

Multi-Buyer Research

Presented May 2, 2018

Agenda

- Background and Approach
- Understanding the Clusters
 - Carpools and Careers
 - Educated and Active Seniors
 - Single Income Varsity Parents
 - Dual Income Varsity Parent
 - Affluent Boomers
 - Single Parent Strivers
- Additional Discoveries
 - Broadening the Audience
 - 7th Unique Cluster Represented
- Appendix

BACKGROUND & APPROACH

Background Approach

This research is based upon the TRG clusters created from Axiom and tessATL data sets.

IDENTIFICATION OF CLUSTERS

6 Clusters
Identified



This research
explores the
largest clusters
in great detail.

PRIMARY RESEARCH

Hybrid
Methodology



The TRG cluster assignment file was used for survey distribution. However, the actual number of invitations sent were much lower than the original TRG file due to the dependence on email availability and validity. The survey field period was extended with multiple reminders sent so that we could maximize the number of completes received within the reporting deadline required by the participating members of the consortium. It is important to keep in mind that the total number of completes span across all cluster groups so sample sizes can be small in some cases. However, the proportion generally mirrors the size of the cluster group cited by TRG overall.

248
Survey completions
-15 min. in length



12
45 – 60 Minute
In-depth Interviews

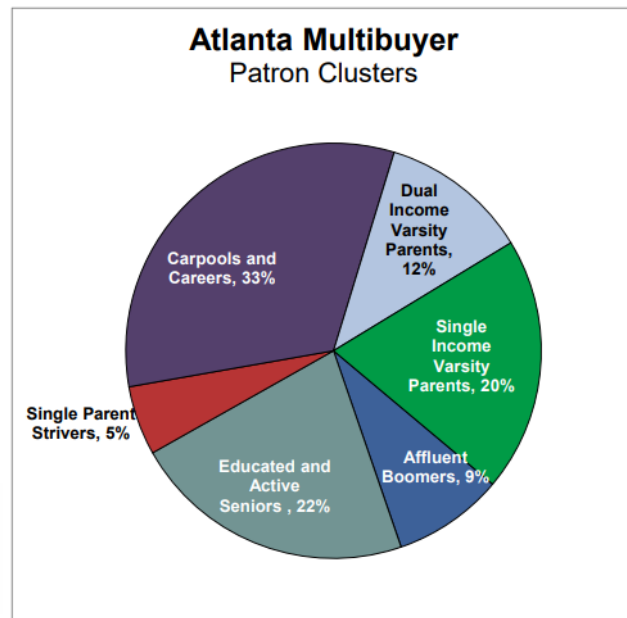


Geographic
Mapping



UNDERSTANDING THE SEGMENTS

TRG Clusters



Six clusters defined from the Atlanta Multibuyer cohort (5,051 households)

Listed from Largest to Smallest

- 1 Carpools and Careers (33%)
- 2 Educated and Active Seniors (22%)
- 3 Single Income Varsity Parents (20%)
- 4 Dual Income Varsity Parents (12%)
- 5 Affluent Boomers (9%)
- 6 Single Parent Strivers (5%)

CARPOOLS AND CAREERS

33%

Atlanta Multi-Buyer Cohort



TRG Clusters: Carpools & Careers (33% of Atlanta Multi-Buyer Cohort)

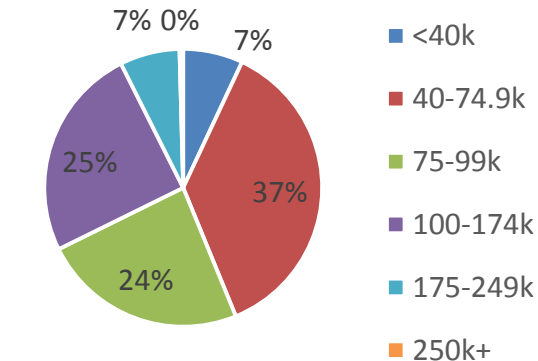
1427

In Data Set

52

Average Age

Income:



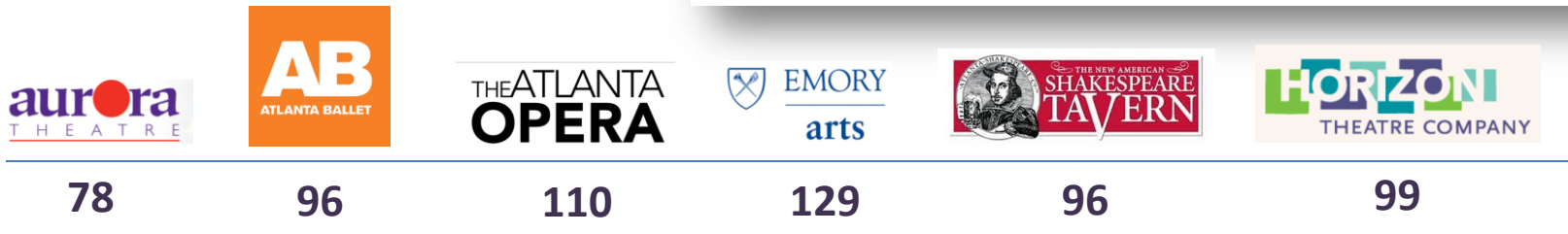
Carpools and Careers

In the middle: middle age, middle income

- Largest cluster within multibuyer cohort
 - 33% of multi-buyers
- Second-youngest group
 - 66% between ages 34-65
- Second lowest income group
 - 79% earn \$45k-\$150k
 - 68% net worth \$100k - \$250k
- Mostly married
 - 72% married
 - 59% have children living at home
- 43% indicated as having a working woman in the home
 - Suggests significant portion of dual-income households
- Self-reported interest in the arts aligns with oldest cohorts

Fast Facts	
% of Database	33%
Primary Age: 34-65	66%
Income: \$45k - \$150k	79%
Net worth: \$50k - \$250k	86%
Education: HS or College	70%
Married or Infer. Marr: Yes	72%
Children Present: Yes	59%
Working Woman: Yes	43%
Interest in Arts: Self-reported	16%
Ethnicity: Caucasian	82%

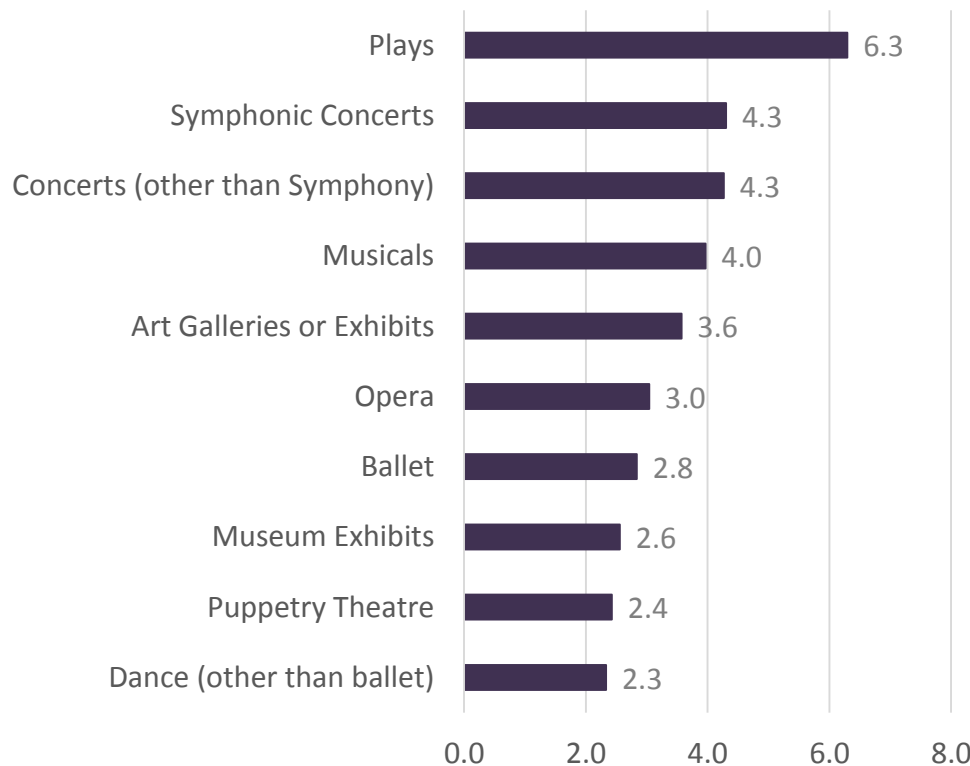
Attendance indexed
across the data set for each company:



TR
ARTS

Carpools and Careers Performance Summary

Arts or Cultural Events Attended in Past 12 Months:



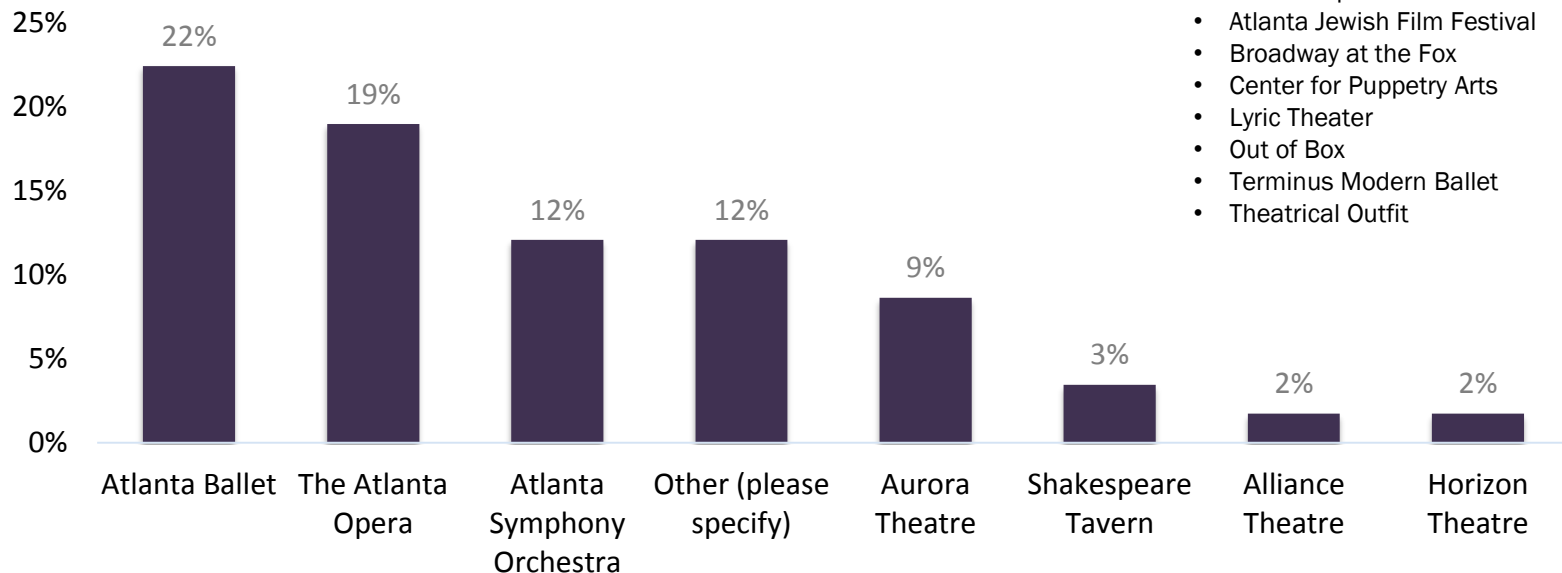
Other Atlanta Events Attended in Past 12 Months:

- 7 Stages
- Actors Express
- Animation Show of Shows
- APO
- Atlanta Baroque Orchestra
- Atlanta Contemporary
- Atlanta festival Singers
- Atlanta Jewish Film Festival
- Bob Jones University
- Broadway at the Fox
- Center for Puppetry Arts
- Concerts at Perimeter College
- Core Dance (B Complex, Decatur)
- Dad's Garage
- DeKalb Symphony
- Fabrefaction Theatre
- Fox Theatre
- Full Radius Dance
- Georgia Ensemble Theatre
- Georgia metropolitan dance
- GloAtl
- GMDT
- GSU – Clarkston
- Gwinnett Ballet Theater
- High
- Lionheart Theatre
- Lucky Penny/Work Room
- Lyric theatre
- Marietta Theater Company
- MOCA
- New Theatre on the Square
- OnStage Atlanta
- Opera via MetLive
- Orbit Arts Academy
- Out of Box
- Phillips Arena
- Rialto
- Roswell Cultural Arts Center
- Serenbe
- Spivey Hall
- Synchronicity
- Terminus Modern Ballet
- Theatrical Outfit
- True Colors Theatre
- Variety Playhouse
- Village Theater
- International Festival

Q2. For each of the following art or cultural events attended, please estimate how many events you attended in the last 12 months for each.
Q4r9oe: And, more specifically to Atlanta, which of the following have you attended in the past 12 months? - Other (please specify)
Among Carpools and Careers segment
"Other" comments shown as written by respondent and shown in alphabetical order.

Carpools and Careers Member Summary

Season Ticket Holder, Member or Subscriber Most Recent Season



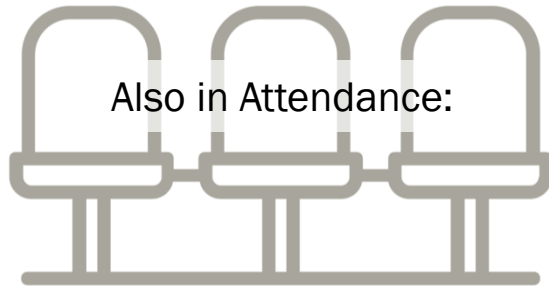
Other Season Ticket or Member Organizations

- Actor's Express
- Atlanta Jewish Film Festival
- Broadway at the Fox
- Center for Puppetry Arts
- Lyric Theater
- Out of Box
- Terminus Modern Ballet
- Theatrical Outfit

47% Are not season ticket holders,
members or subscribers

Carpools and Careers

Atlanta Outlook and Entertainment



Also in Attendance:

- Adult friend(s) (69%)
 - A spouse/partner (59%)
 - Other family >18 years (31%)
 - No one else / attend by myself (29%)
 - Child/children <18 years (22%)
- Measures similar to what we see with the total sample

Atlanta's Current Cultural Landscape

(57% Top Two Box vs. 62% total sample))



Atlanta's Cultural Growth Outlook

(79% Expanding – Improving vs. 78% total sample)



Other Forms of Entertainment:



95%
Dinner



76%
Visiting with Friends



74%
Movies



47%
Watch Sporting Events
Vs. 39% total sample



33%
Outdoor Activity

Carpools and Careers

Motivation and Importance

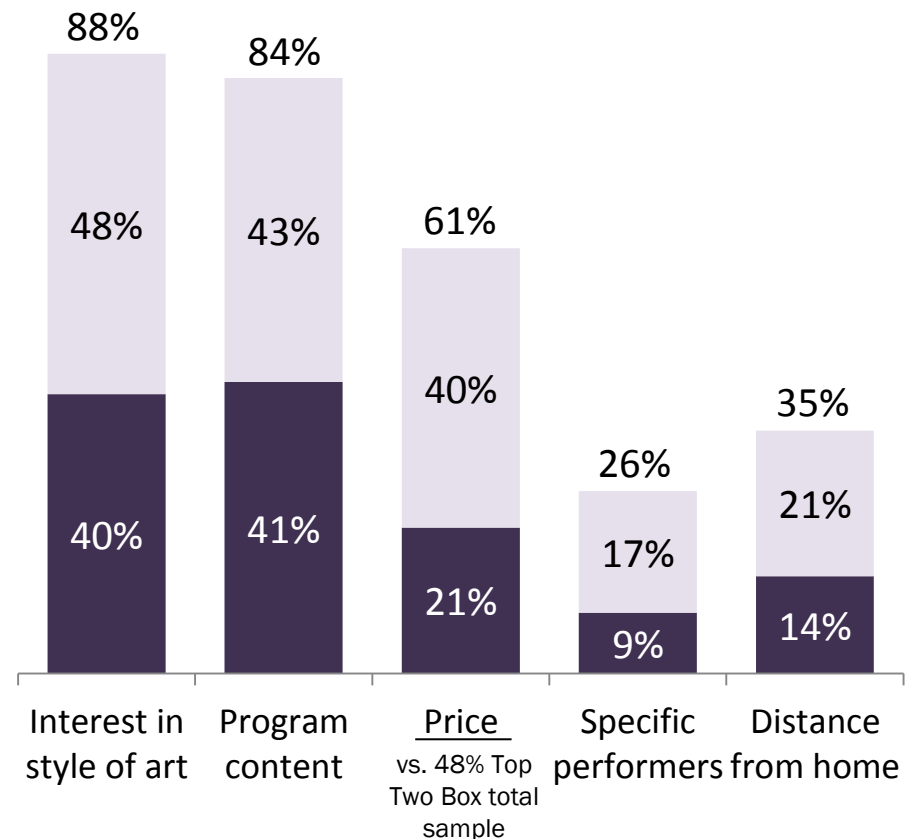
Top Three Motivating Factors

- 1 Lift my spirits (66%)
- 2 Inspire me (48%)
- 3 Provide meaning to my life (47%)
Tied with another cluster as strongest reporting this factor (compared to 40% total sample)



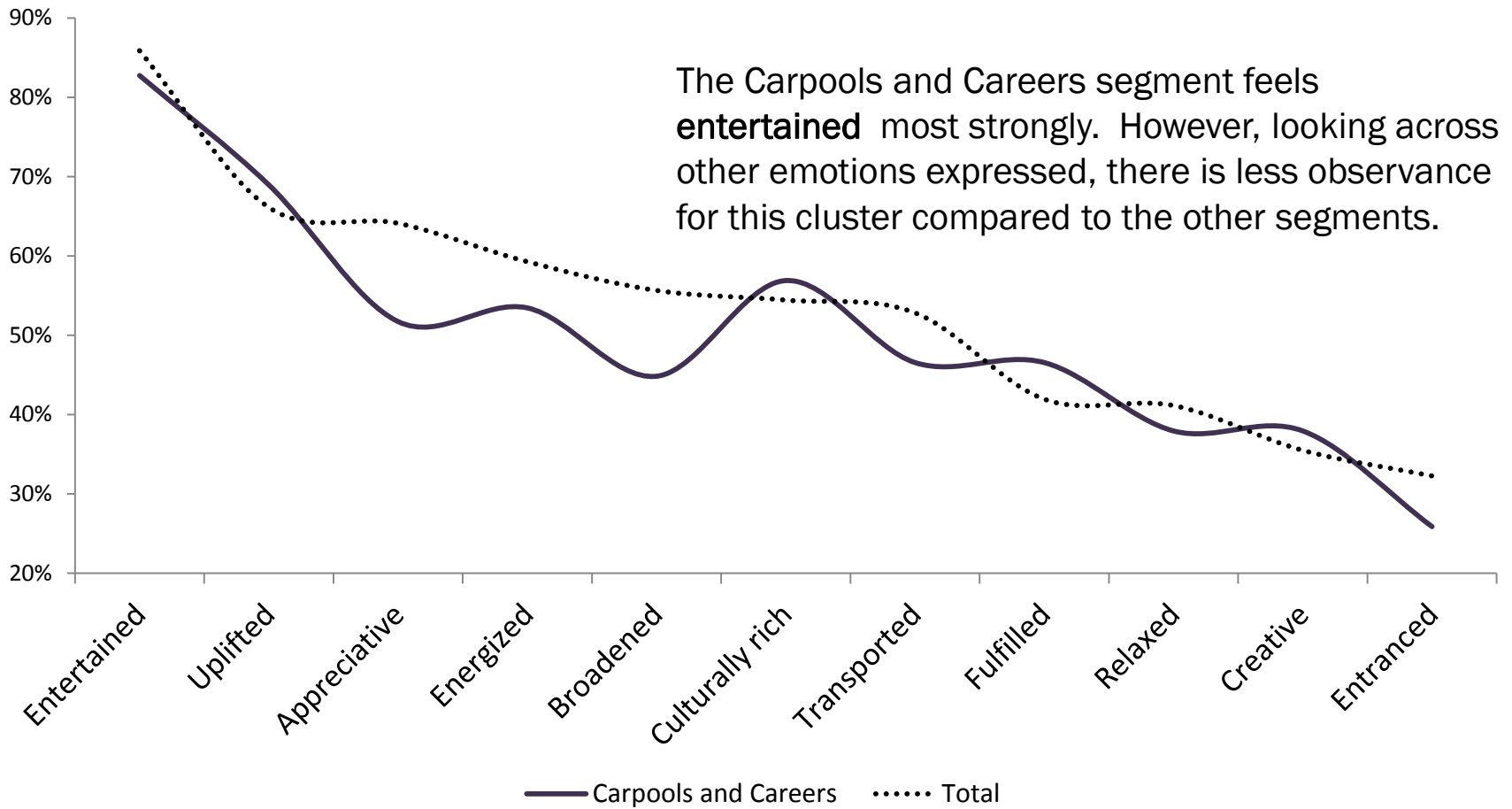
I get so much out of it but I have limited resources of money, and just not enough time because of my work.

■ Extremely important ■ Very important



Carpools and Careers

Emotions Experienced



Carpools and Careers

Benefits Received

AESTHETICS

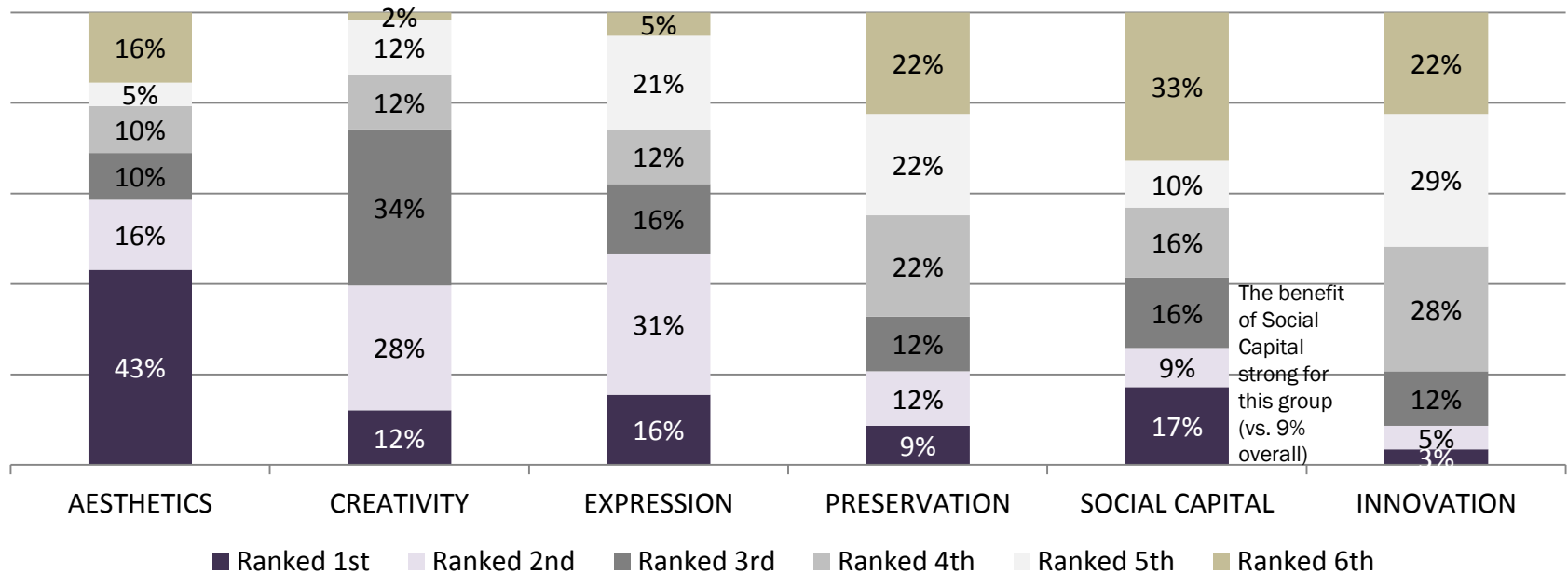
- *The arts create beauty and preserve it as part of culture (59% 1ST/2ND)*

EXPRESSION

- *Artistic work lets us communicate our interests and visions (47% 1ST/2ND)*

CREATIVITY

- *The arts encourage creativity, a critical skill (40% 1ST/2ND)*



Carpools and Careers: Family Focused Faith

It seems like we're always transitioning to life as we move from each phase to the next in our family – and this year is no different. I'll be going back to work after a long break after my second child was born. Fortunately, my husband was able to support our family during that time, but we married young, so we really didn't need much. We figured out how to make ends meet. I feel good about the decision... when my daughter (my oldest) asked for her own Facebook account, it was just another gentle reminder that they are growing up fast and they can handle this change. I'm not sure I'll grant her Facebook wish just yet, but I can say that I'm more conscious of the time I'm spending on it while in front of her!

Our lives are pretty busy, and although it seems like we never have as much time as we would like, I know I'll need to get us completely organized so we can continue to keep the kids involved in their activities and take time for ourselves.

Making the right choices for our family has always been our barometer in life. We enjoy spending time with each other, and it's not something we take for granted. We like doing things and doing things that offer growth for our children are a bonus. For example, the exposure of the arts brings a depth to lives that we don't get from going to a Hawks game, for example. Don't get me wrong, the boys love those nights, and we make it a point to go, but the complexity of entertainment from a cultural performance just doesn't compare. So, we do our best to keep our favorite art venue plus other activities in our budget. Of course, with only so much to go around and only so much spare time, we feel pretty good about the time we spend together doing activities as a family.



RESIDENCE: Decatur
MARRIED: Yes
CHILDREN: Yes
CURRENT HHI: \$40,000 - 75,000

EDUCATED AND ACTIVE SENIORS

22%

Atlanta Multi-Buyer Cohort



TRG Clusters: Educated and Active Seniors (22% of Atlanta Multi-Buyer Cohort)

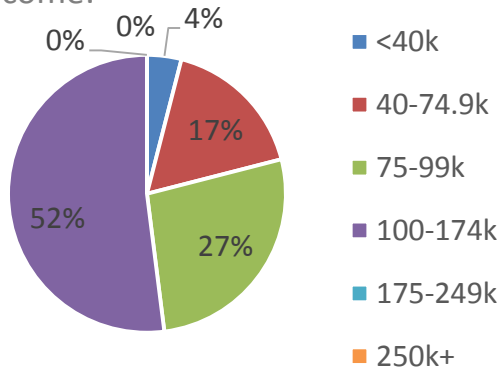
970

In Data Set

65

Average Age

Income:



Educated and Active Seniors

Affluent and highly educated married seniors

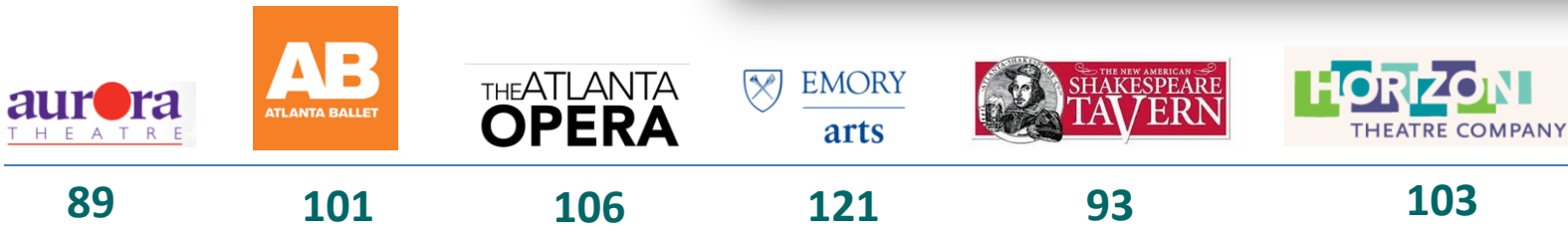
- Second largest cohort
 - 22% of multibuyers
- Age range skews oldest
 - 60% between ages 66-81
- Second highest income group
 - 87% earn \$65k-\$175K
 - 99% have a net worth of \$500k+
- Highly educated
 - 43% have a graduate degree
- Mostly married
 - 69% married or inferred
 - 52% have children present
- Ethnically similar to the Affluent Boomers cohort

Fast Facts	
% of Database:	22%
Primary Age: 66-81	60%
Income: \$65k - \$175k	87%
Net worth: \$500k+	99%
Education: Grad/College	80%
Married or Inferred Marr: Yes	69%
Working Woman: Yes	44%
Interest in Arts: Self-reported	17%
Ethnicity: Caucasian	92%



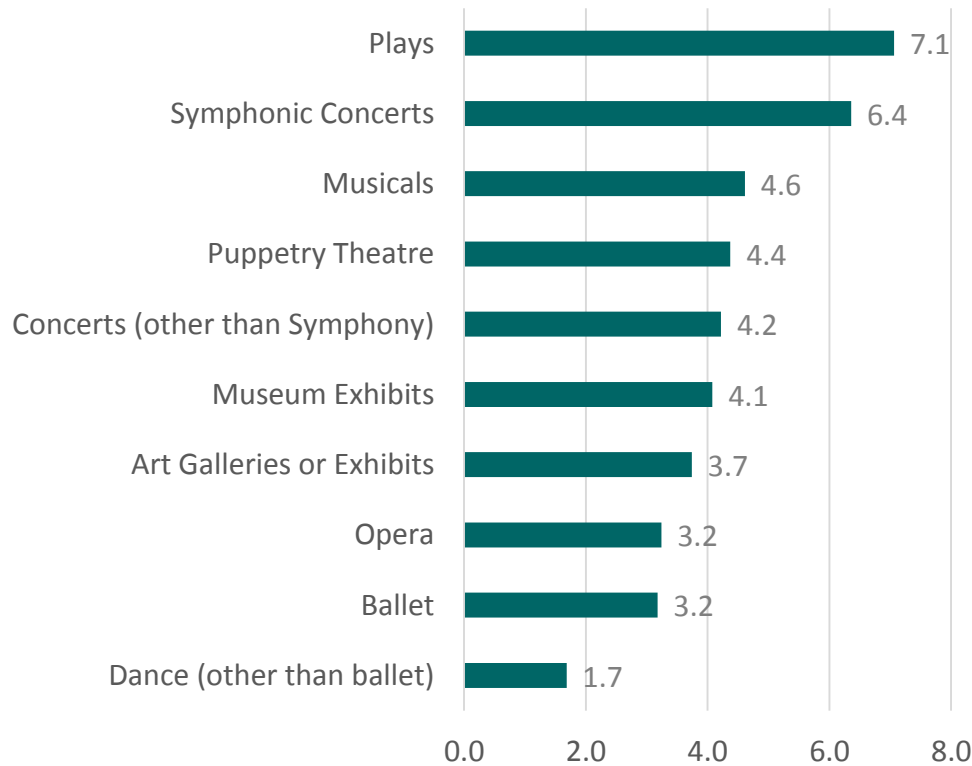
Attendance indexed

across the data set for each company:



Educated and Active Seniors Performance Summary

Arts or Cultural Events Attended in Past 12 Months:



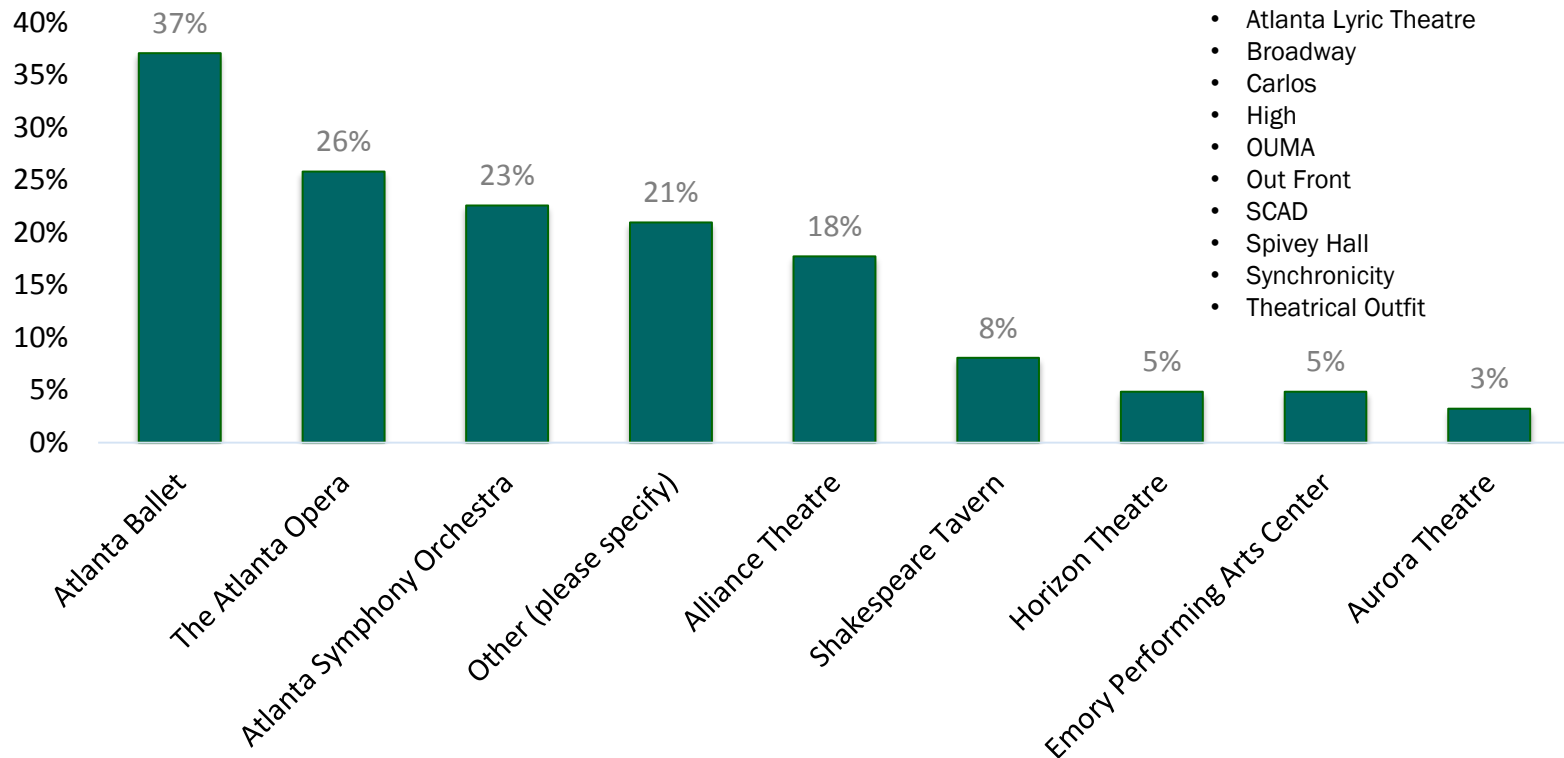
Other Atlanta Events Attended in Past 12 Months:

- 7 Stages
- Actor's Express
- Alliance
- Aris Theatre
- Atlanta Chamber Music
- Atlanta Lyric
- Ballet in NY
- Broadway
- Churches
- Cobb Energy Center
- Columbus Symphony Orchestra
- Concerts in the Garden at Atlanta Botanical Garden
- Gateway Theatre
- Georgia Ensemble
- Gwinnett Ballet
- High
- Jewish Film Festival
- KSU
- PUMC Buckhead
- Rialto Center
- Roswell Arts Center
- Serenbe
- Solstice
- Spivey Hall
- Stage Door
- Synchronicity
- Terminus Ballet
- Theatrical Outfit
- True Colors

Educated and Active Seniors Member Summary

Season Ticket Holder, Member or Subscriber Most Recent Season:

Other Season Ticket
or Member Organizations:



- Actor's Express
- Aris
- Atlanta Lyric Theatre
- Broadway
- Carlos
- High
- OUMA
- Out Front
- SCAD
- Spivey Hall
- Synchronicity
- Theatrical Outfit

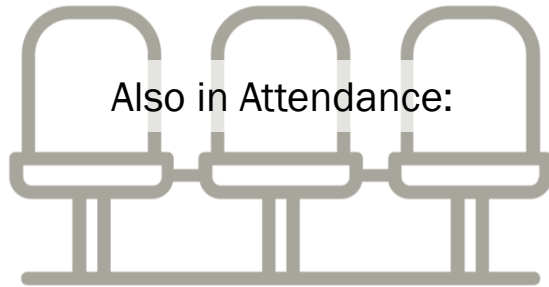
32% Are not season ticket holders,
members or subscribers

Q5. Which of the following are you a season ticket holder, member, or subscriber for the most recent season?

Among Educated and Active Seniors segment

"Other" comments shown as written by respondent and shown in alphabetical order.

Educated and Active Seniors Atlanta Outlook and Entertainment



A spouse/partner (65%)
Adult friend(s) (63%)
Other family >18 years (26%)
All other groups 15% or less

Atlanta's Current Cultural Landscape

(among the most positive at 69% Top Two Box vs. 62% total sample)

Dissatisfied



Satisfied

Atlanta's Cultural Growth Outlook

(76% Expanding – Improving vs. 78% total sample)

Declining



Expanding

Other Forms of Entertainment:



94%
Dinner



76%
Visiting with Friends



71%
Movies



37%
Watch Sporting Events



32%
Charity Event

Educated and Active Seniors Motivation and Importance

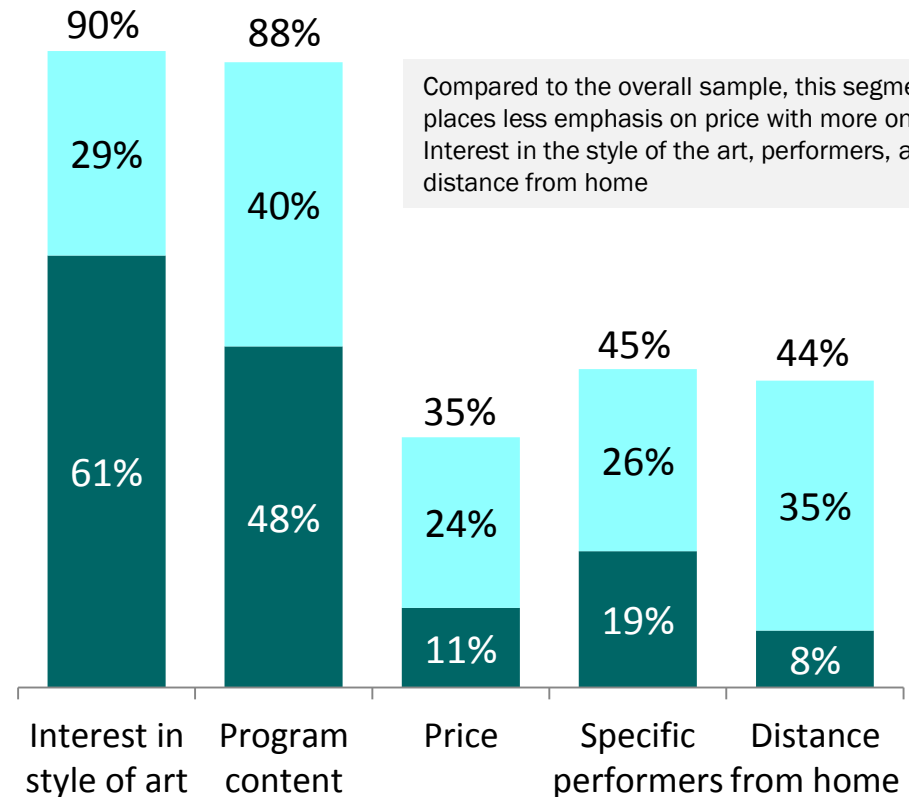
Top Three Motivating Factors

- 1 Lift my spirits (68%)
- 2 Inspire me (66%)
- 3 Provide meaning to my life (47%)
Tied with another cluster as strongest reporting this factor (compared to 40% total sample)



We've gone to more events the last 25 years, than we did the first 15 in Atlanta. It is just the social time together and being around other people enjoying the arts. It feels good and brightens my day.

■ Extremely important ■ Very important



Educated and Active Seniors (22% of Atlanta Multi-Buyer Cohort)

35.2 Years

Length of time lived in the Greater Atlanta area
(compared to 28.5 years for the total sample)

65%

Live Inside the Perimeter
(compared to 44% for the total sample)



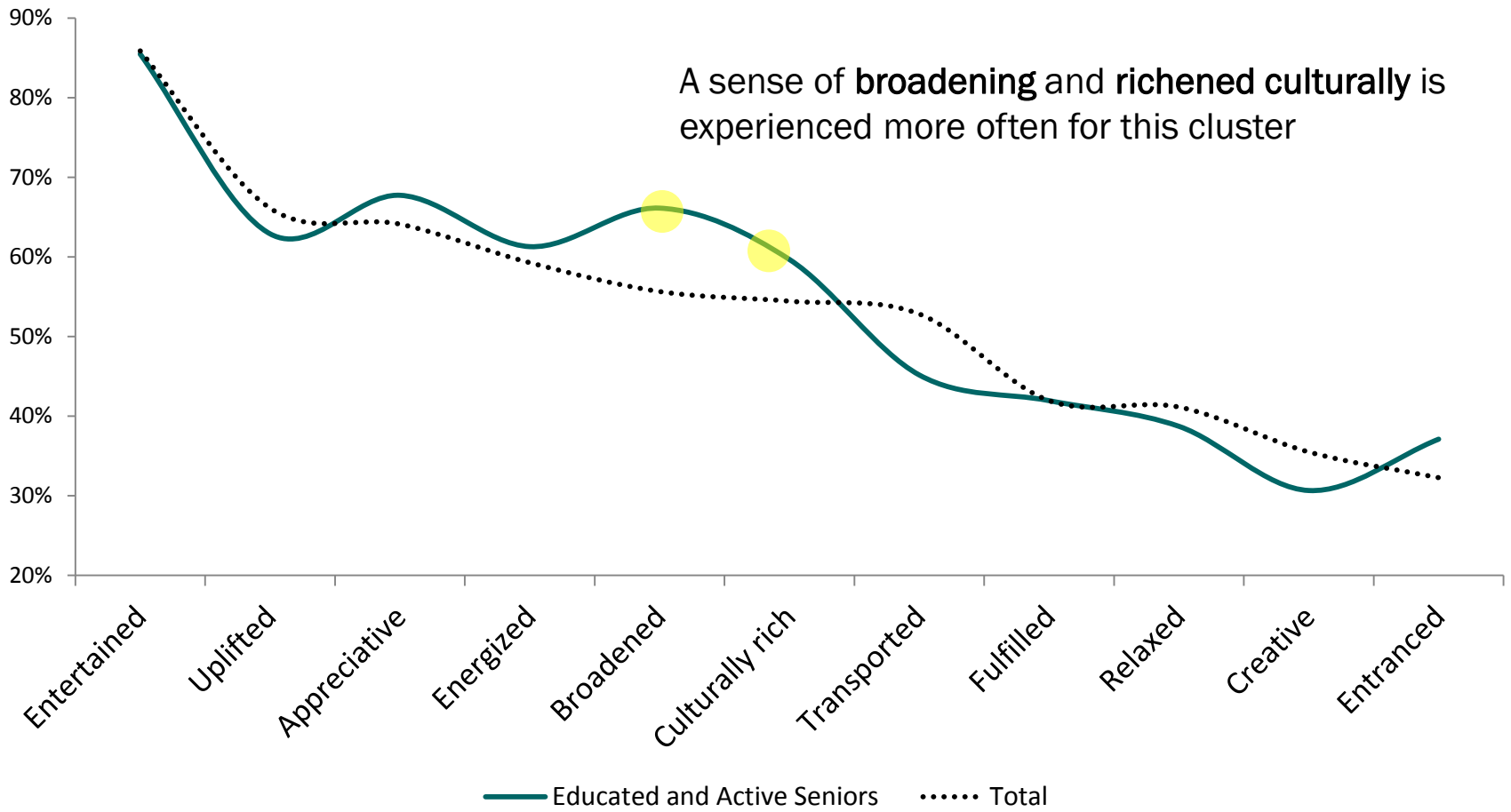
53%

Public service television / cable shows
(compared to 38% for the total sample)

23%

Other (namely PBS, movies, concerts, and sports)
(compared to 23% for the total sample)

Educated and Active Seniors Emotions Experienced



Educated and Active Seniors

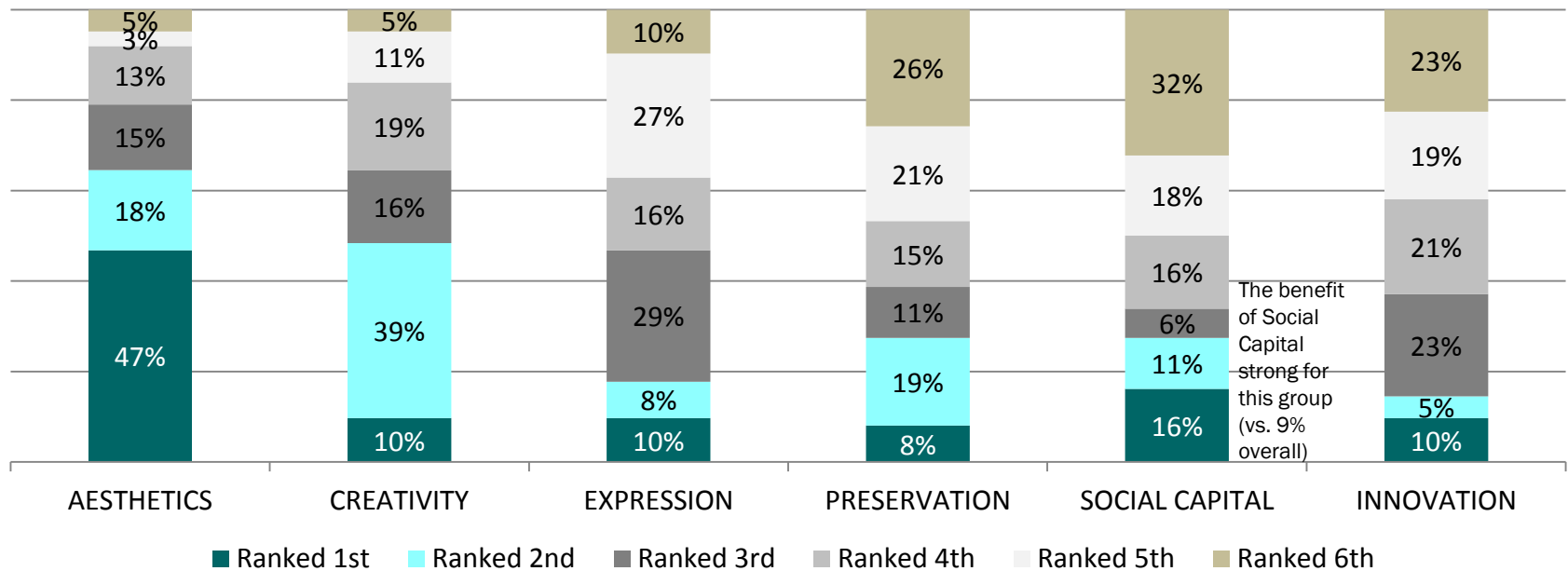
Benefits Received

AESTHETICS

- The arts create beauty and preserve it as part of culture (65% 1ST/2ND strongest among all segments compared to 40% 1st overall)

CREATIVITY

- The arts encourage creativity, a critical skill (49% 1ST/2ND)



Educated and Active Seniors: Social Chairman Charles

To say we have hit our stride after 53 years of marriage would be an understatement. My wife and I have our routine, but we like to make a conscious effort to keep ourselves engaged in life. Our entertainment pallet is virtually the same (although you won't catch me watching General Hospital; I'll be on the computer or reading fiction from the library instead). We have a close group we like to get together with and we all enjoy doing similar types of things together. Somewhere along the way, I was designated as the "cruise director" for our circle of friends. It makes my children laugh but every group needs one, right? About once a month (usually on a Saturday morning) I'll send out an email to the group and outline the shows we might want to see. They let me know which ones will work and I buy the tickets. Then I send out the email saying how much they owe me. It all happens while I'm budgeting our own entertainment dollars – we know we 'can't go to every wedding' so we do some picking and choosing.

We tend to like the smaller theatres that are a little easier to get to. Parking is a breeze there. If it's one that might be more limited on restaurant options, then we might opt for a matinee with the other "gray hairs" and then go to another area of town for dinner. Sometimes I'll go to a show and I might not even know what it's about but I'll be open-minded so I can broaden my horizons.

We might even do something on a weekday because we don't have to worry about getting up for work the next morning. Those days are behind us. If that's the case, then I reserve my weekends for golf or running errands. We try to stay busy. Sometimes it's just about filling up the day because we do have a lot of downtime. But, our feeling is that it's important to keep your brain active – you should never stop learning. That's one of the great things about the arts – it makes you think and discuss. Although, the Internet does that, too. But, above all, we aim to just enjoy an enriched life!



RESIDENCE: Inman Park

MARRIED: Yes

CHILDREN: Yes (out of the home)

CURRENT HHI: \$100,000-\$174,000

SINGLE INCOME VARISITY PARENTS

20%

Atlanta Multi-Buyer Cohort



TRG Clusters:

Single Income Varsity Parents (20% of Atlanta Multi-Buyer Cohort)

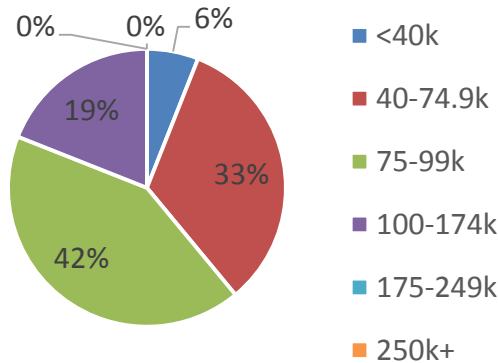
870

In Data Set

58

Average Age

Income:



Attendance indexed
across the data set for each company:

aurora
THEATRE

103

AB
ATLANTA BALLET

101

THE ATLANTA
OPERA

98

EMORY
arts

97

THE NEW AMERICAN
SHAKESPEARE
TAVERN

97

HORIZON
THEATRE COMPANY

102

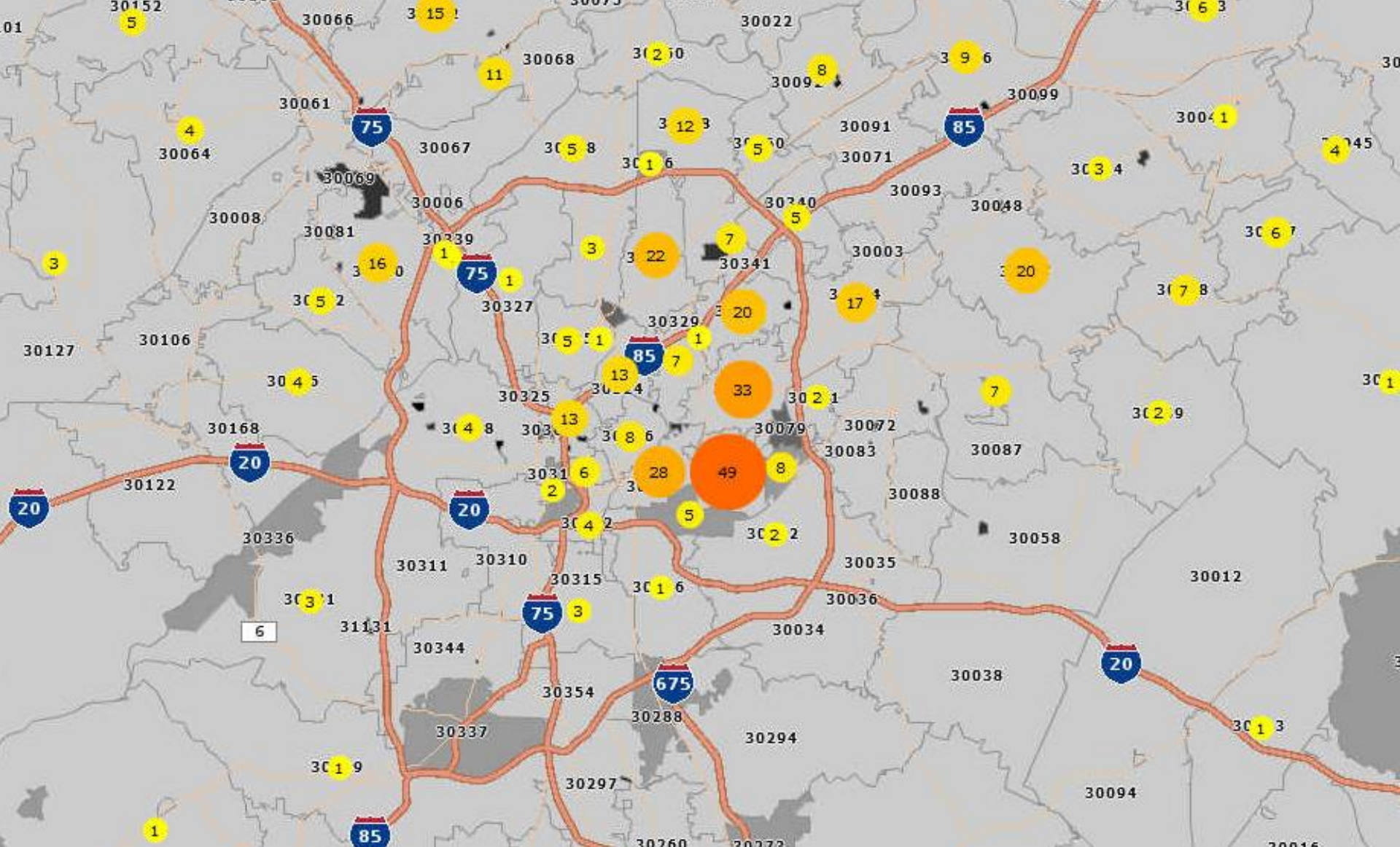
Single Income Varsity Parents

Affluent parents with older children

- Medium sized cohort
 - 20% of database
- Like dual income group, skews towards older Gen X and Boomer
 - 43% are between ages 42-65
- Average income skews lower
 - 42% earn \$75-\$99k
- Net worth comparable to Dual Income Varsity Parents
 - 99.9% net worth \$250k-\$500k
- Lower percentages married and working women
 - 59% married, vs. 90% for dual income
 - 38% working woman, vs. 58% for dual income group

Fast Facts	
% of Database	20%
Primary Age: 42-75	83%
Income: \$65k - \$150k	80%
Net worth: \$250k - \$500k	99%
Education: College or Grad Degree	75%
Married or Infer. Marr: Yes	59%
Children Present: Yes	51%
Working Woman: Yes	38%
Interest in Arts: Self-reported	13%
Ethnicity: Caucasian	89%

TRG
ARTS



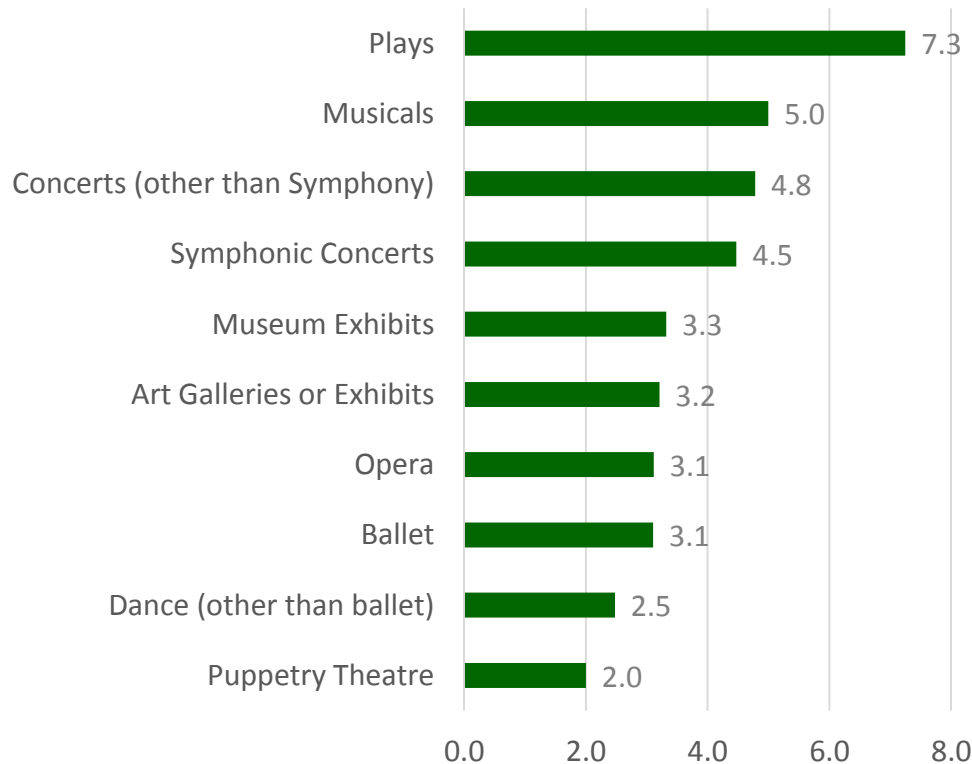
Single Income Varsity Parents Residential Zip Codes

Clusters identified by TRG

Residential zip codes contained in record used to plot geographic concentrations.

Single Income Varsity Parents Performance Summary

Arts or Cultural Events Attended in Past 12 Months:



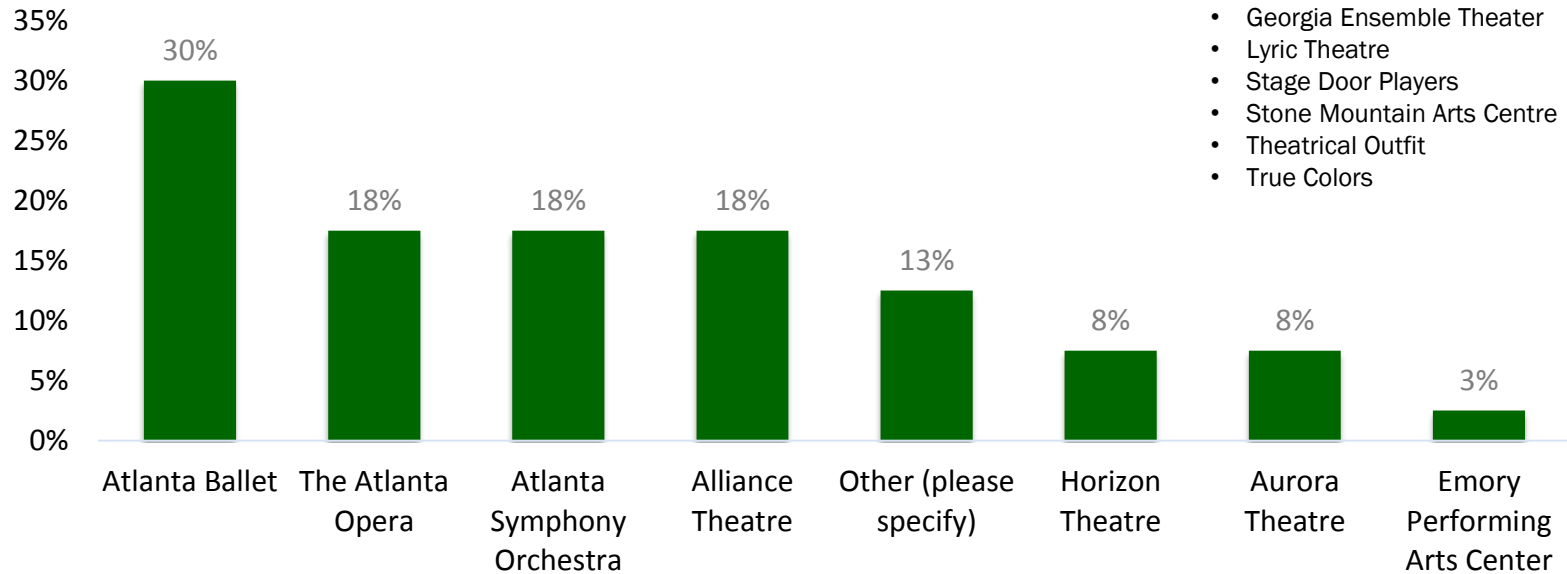
Other Atlanta Events Attended in Past 12 Months:

- Actor's Express
- Book festivAL
- Community theater
- Dad's
- DeKalb Symphony Orchestra
- Dominion Entertainment
- Fox Theatre
- GA State
- Georgia Ensemble Theater
- High school concerts
- Horizon
- Jewish film festival
- Lyric Theatre
- Met HD
- Museums and theaters out of town
- New Trinity Baroque
- NYC Ballet
- OnStage Atlanta
- Serenbe Playhouse
- Spivey hall
- Stage Door Players
- Stone Mountain Arts
- Strand Theatre
- Theatrical Outfit
- True Colors

Single Income Varsity Parents Member Summary

Season Ticket Holder, Member or Subscriber Most Recent Season

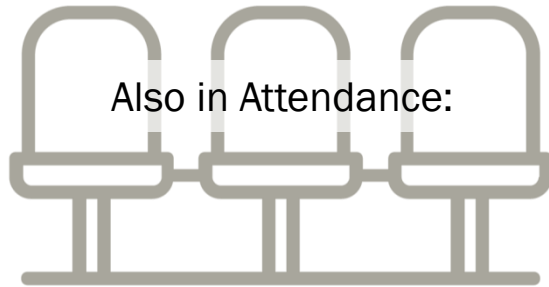
Other Season Ticket
or Member Organizations



- Actor's Express
- Broadway Series at Fox
- Georgia Ensemble Theater
- Lyric Theatre
- Stage Door Players
- Stone Mountain Arts Centre
- Theatrical Outfit
- True Colors

30% Are not season ticket holders,
members or subscribers

Single Income Varsity Parents Atlanta Outlook and Entertainment



Also in Attendance:

Adult friend(s) (60%)

A spouse/partner (43% vs. 60% total)

No one / attend by myself (35% vs. 23% total)

A date (20% vs. 8% total)

All other groups 18% or less

Atlanta's Current Cultural Landscape

(58% Top Two Box vs. 62% total sample)

Dissatisfied



Satisfied

Atlanta's Cultural Growth Outlook

(73% Expanding – Improving vs. 78% total sample)

Declining



Expanding

Other Forms of Entertainment:



100%
Dinner



88%
Movies
vs. 75% total sample



75%
Visiting with Friends



55%
Outdoor Activity



40%
Watch Sporting Events

Single Income Varsity Parents Motivation and Importance

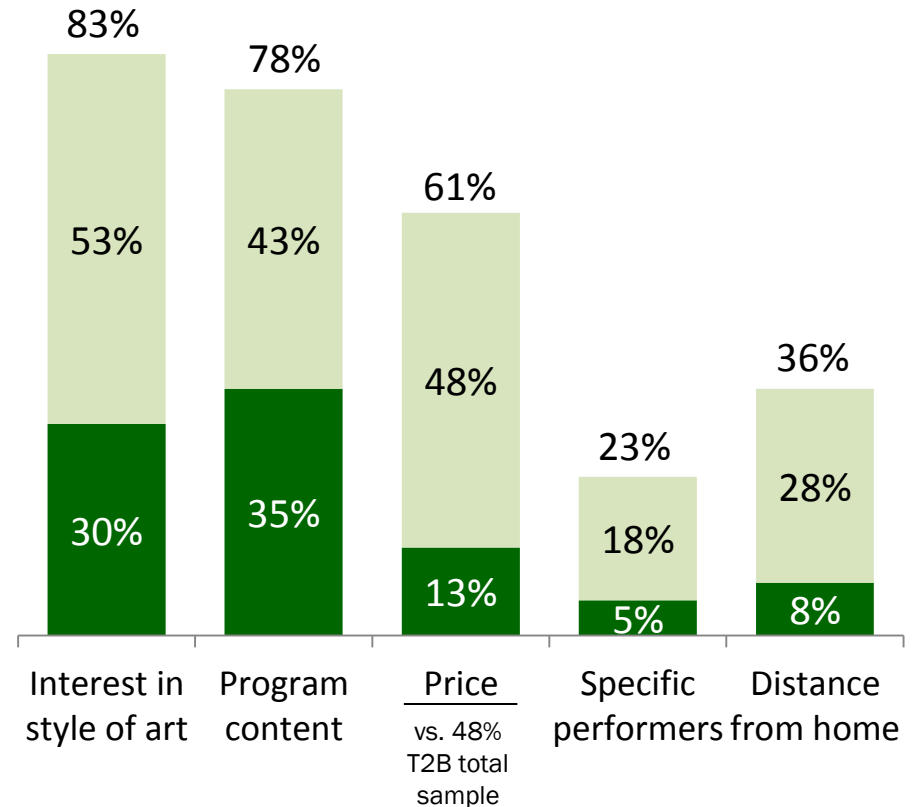
Top Three Motivating Factors

- 1 Inspire me (68%)
- 2 Lift my spirits (63%)
- 3 Provide meaning to my life (43%)

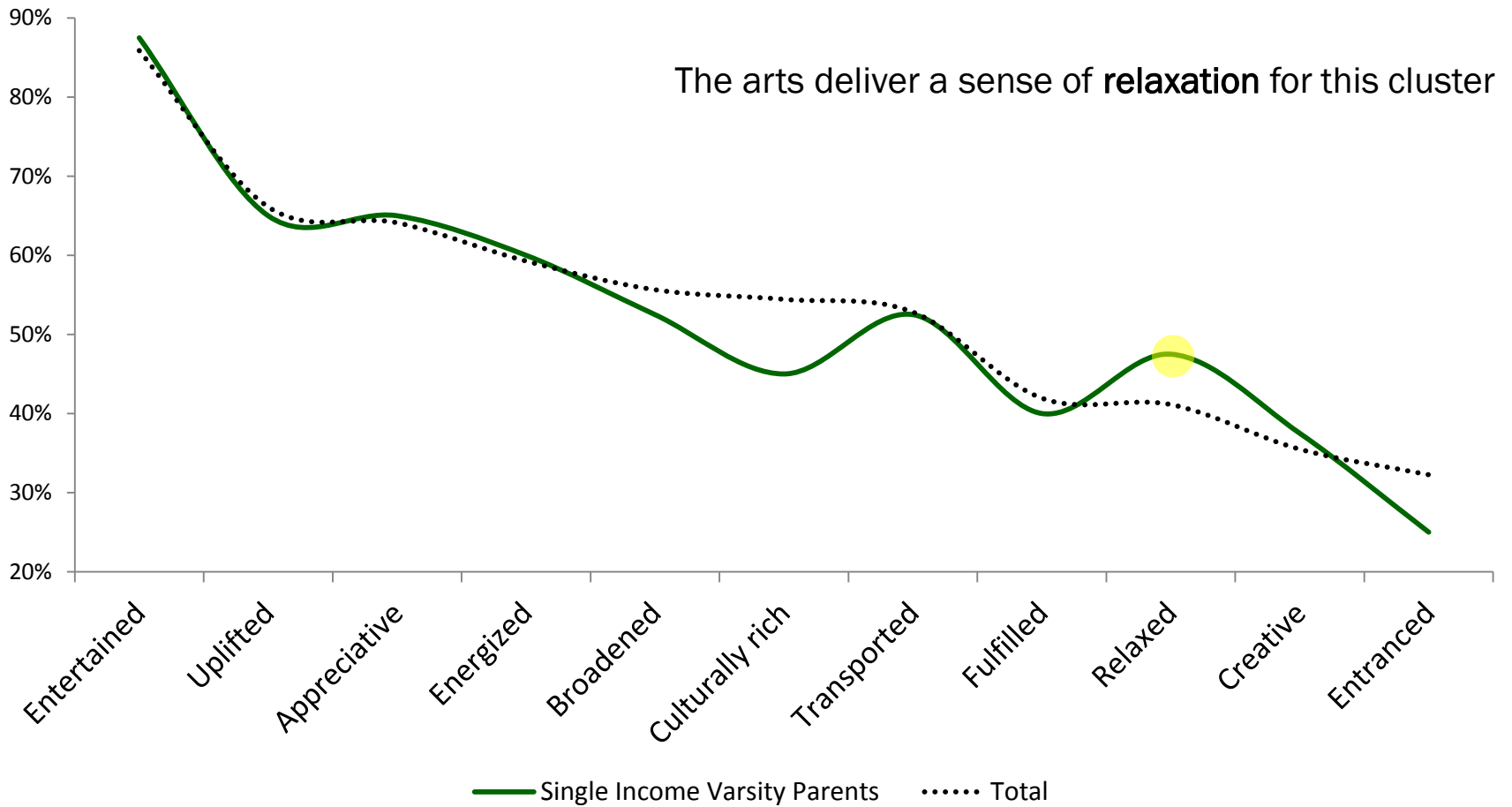
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Just being in a space together with different people and all being present together is special. So often we get wrapped up in our own life and experiences that we don't consider others. But, when we are forced to experience someone else's story in a performance it is pivotal for the human experience.

■ Extremely important ■ Very important



Single Income Varsity Parents Emotions Experienced



Single Income Varsity Parents

Benefits Received

CREATIVITY

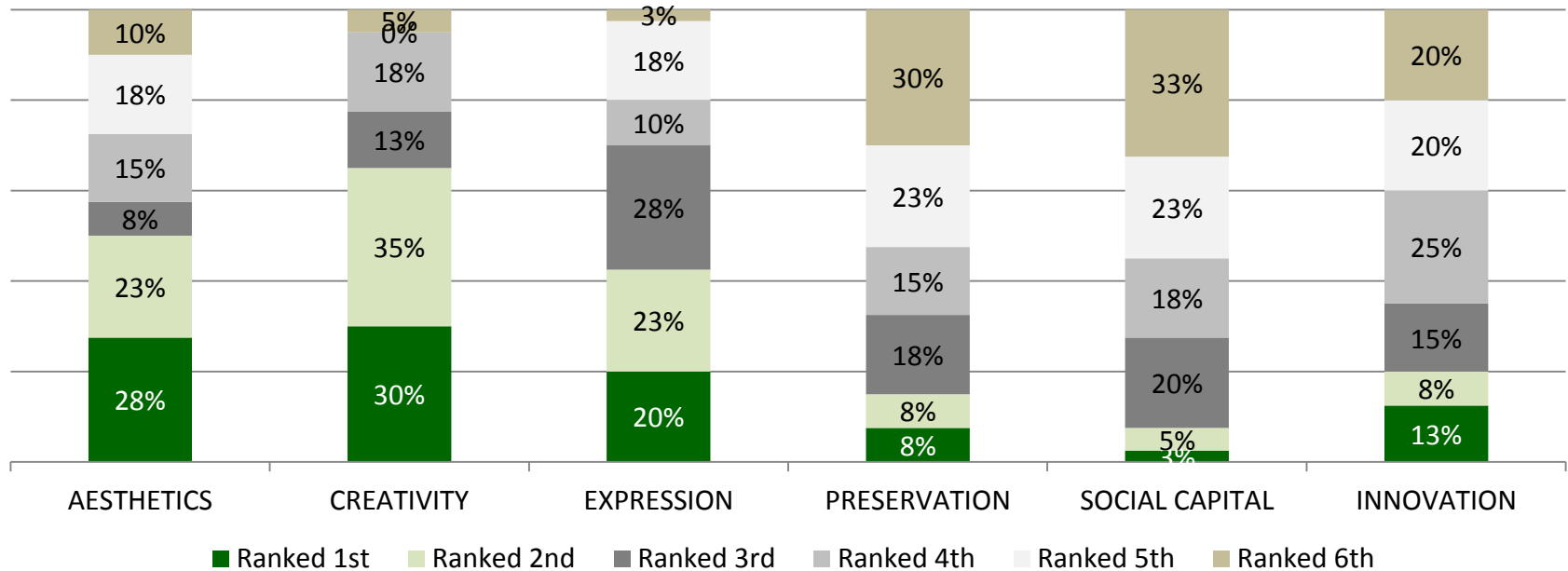
- The arts encourage creativity, a critical skill (65% 1ST/2ND strongest among all segments compared to 18% 1st overall)

AESTHETICS

- The arts create beauty and preserve it as part of culture (51% 1ST/2ND)

EXPRESSION

- Artistic work lets us communicate our interests and visions (43% 1ST/2ND strongest among all segments compared to 15% 1st overall)



Single Income Varsity Parents: Like Minded Lacy

I do well in my career, but it's just not the most important thing in my life (don't tell my boss that). I feel like there are more significant things in life. I like to volunteer and help others. It's my civic duty, but it also plays a more important role: self-fulfillment.

Although I'm comfortable financially, I like to be mindful of spending. I always make time and allocate budget for cultural events. If I can't find someone to go with, I'll go by myself. In fact, it's liberating to do that and soak in the scenes. I find it very relaxing. Plus, it's the great equalizer. You can be in a theatre with people from all different parts of Atlanta, all walks of life, and just a simple nod or a one minute exchange of words about a specific scene or performer suddenly becomes the common denominator. Atlanta is a diverse city, and there are many pockets, but they tend to be pockets of homogenous groups. To see interaction with strangers having something in common is lovely and exciting.

Another thing I like to do is go to the movies. It's fun just to sit back and be entertained. But, I have to say, it doesn't spark the same cultural experience by any means, but I still enjoy it.



RESIDENCE: North Druid Hills
MARRITAL STATUS: Divorced
CHILDREN: Yes (older)
CURRENT HHI: \$75,000-\$99,000

DUAL INCOME VARISITY PARENTS

12%

Atlanta Multi-Buyer Cohort



TRG Clusters:

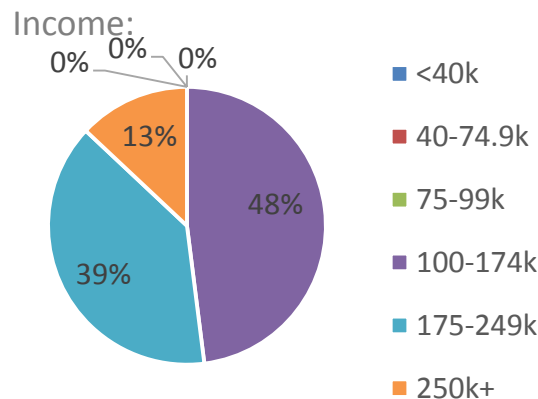
Dual Income Varsity Parents (12% of Atlanta Multi-Buyer Cohort)

508

In Data Set

55

Average Age



Attendance indexed
across the data set for each company:

aurora
THEATRE

103

AB
ATLANTA BALLET

101

THE ATLANTA
OPERA

98

EMORY
arts

97

THE NEW AMERICAN
SHAKESPEARE
TAVERN

97

HORIZON
THEATRE COMPANY

102

Dual Income Varsity Parents

Multi-income households, parents of teenagers

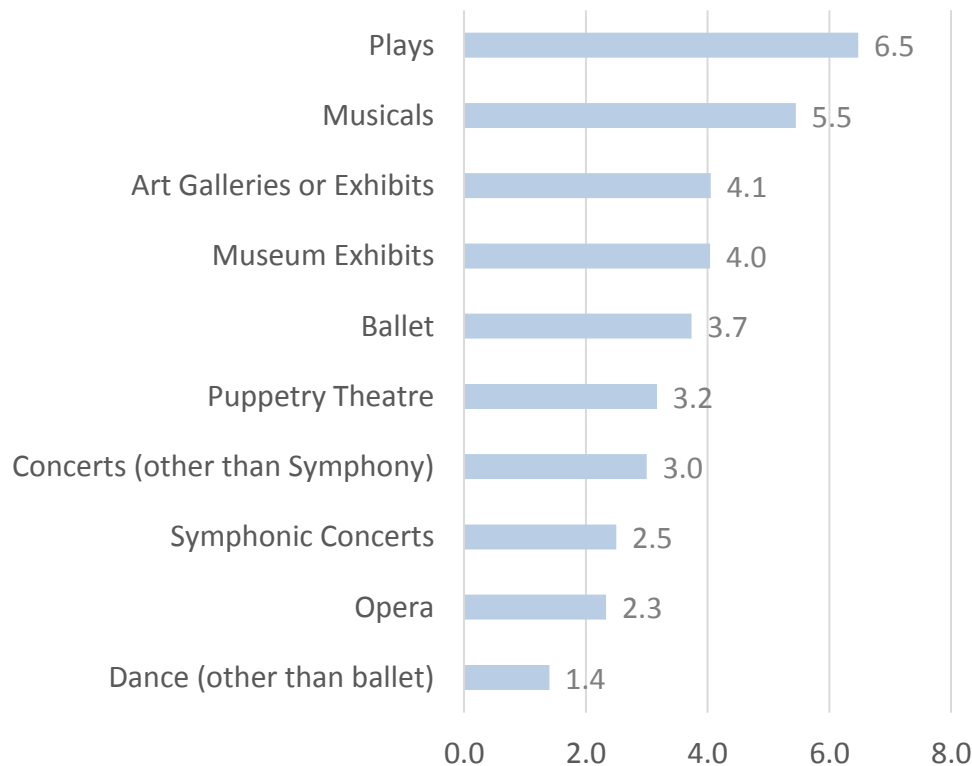
- Medium sized cohort
 - 12% of database
- Age range skews towards older Gen X and Boomers
 - 76% are between 45-67
- Income in middle range for total multibuyer group
 - 87% earn \$100k-\$250k
- Higher levels of education
 - 37% have graduate degrees
- Overwhelmingly married with children
 - 90% married
 - 80% have children at home

Fast Facts	
% of Database	12%
Primary Age: 46-67	76%
Income: \$100k - \$250k	87%
Net worth: \$250k - \$500k	94%
Education: College or Grad Degree	79%
Married or Infer. Marr: Yes	90%
Children Present: Yes	80%
Working Woman: Yes	59%
Interest in Arts: Self-reported	14%
Ethnicity: Caucasian	92%

TR
ARTS

Dual Income Varsity Parents Performance Summary

Arts or Cultural Events Attended in Past 12 Months:



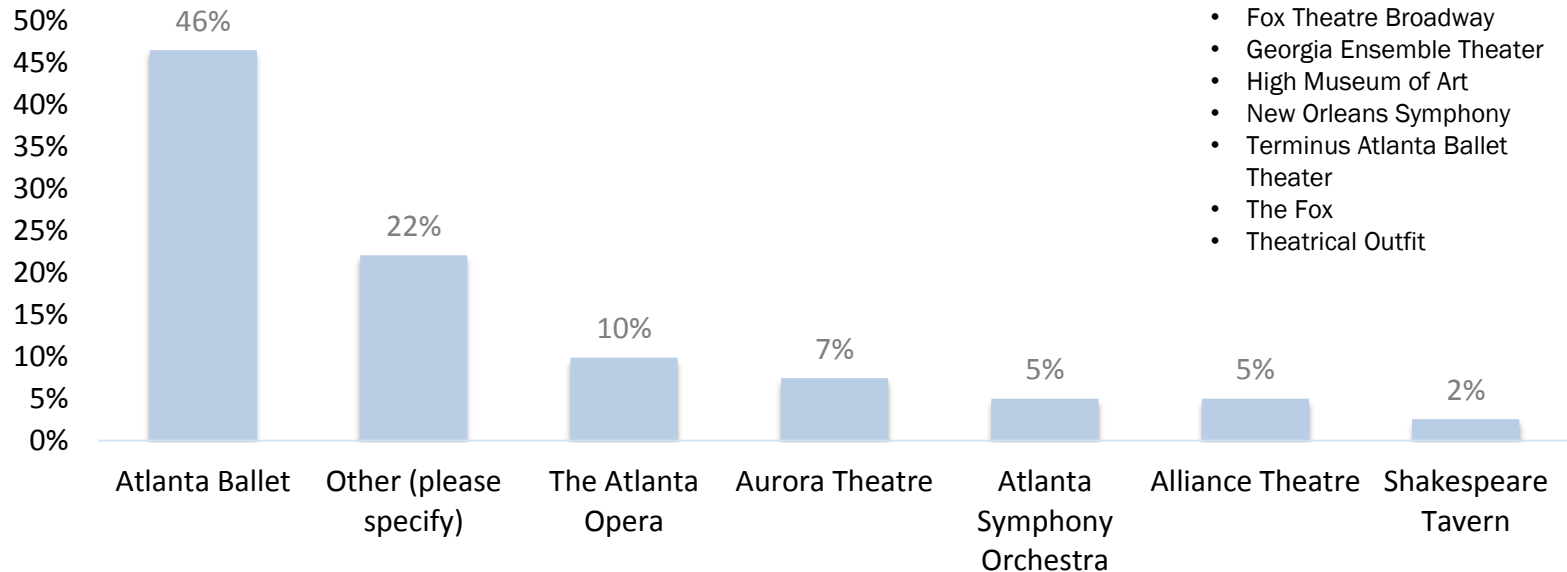
Other Atlanta Events Attended in Past 12 Months:

- Actor's Express
- Acts at Phillips
- Atlanta Dance Collective
- Atlanta Lyric Theatre
- Atlanta Young Singers
- Ballethnic
- Broadway at The Fox
- CCCEPA performances
- Center for Puppetry Arts
- City Winery
- Cobb Entergy Performing Arts center
- Fox Theatre
- Georgia Ensemble Theater
- High Museum
- Jazz on Tap festival
- Kennesaw University
- Kenny Leon
- Lyric's Studio
- Marietta Theatre Company
- Seven Stages
- Synchronicity
- Terminus Modern Ballet Company / Theater
- Theatrical Outfit
- True Colors Theatre
- Verizon Amphitheater
- Woodruff Arts Center

Dual Income Varsity Parents Member Summary

Season Ticket Holder, Member or Subscriber Most Recent Season

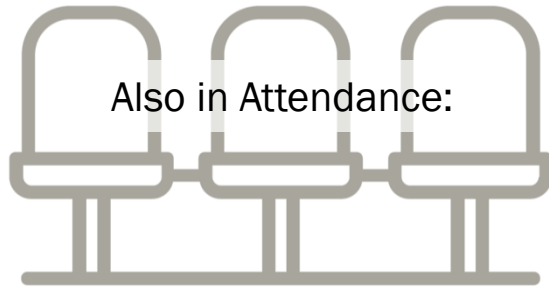
Other Season Ticket
or Member Organizations



- Atlanta Falcons
- Center for Puppetry Arts
- Fox Theatre Broadway
- Georgia Ensemble Theater
- High Museum of Art
- New Orleans Symphony
- Terminus Atlanta Ballet Theater
- The Fox
- Theatrical Outfit

41% Are not season ticket holders,
members or subscribers

Dual Income Varsity Parents Atlanta Outlook and Entertainment



Also in Attendance:

A spouse/partner (78% vs. 60% total)

Adult friend(s) (54%)

Other family >18 years (51% vs. 31% total)

A child <18 years (44% vs. 21% total)

All other groups 10% or less

Atlanta's Current Cultural Landscape

(among the most positive 68% Top Two Box vs. 62% total sample))

Dissatisfied



Satisfied

Atlanta's Cultural Growth Outlook

(80% Expanding – Improving vs. 78% total sample)

Declining



Expanding

Other Forms of Entertainment:

This cluster is slightly stronger across activities



93%
Dinner



78%
Visiting with Friends



78%
Movies



46%
Watch Sporting Events



49%
Outdoor Activity

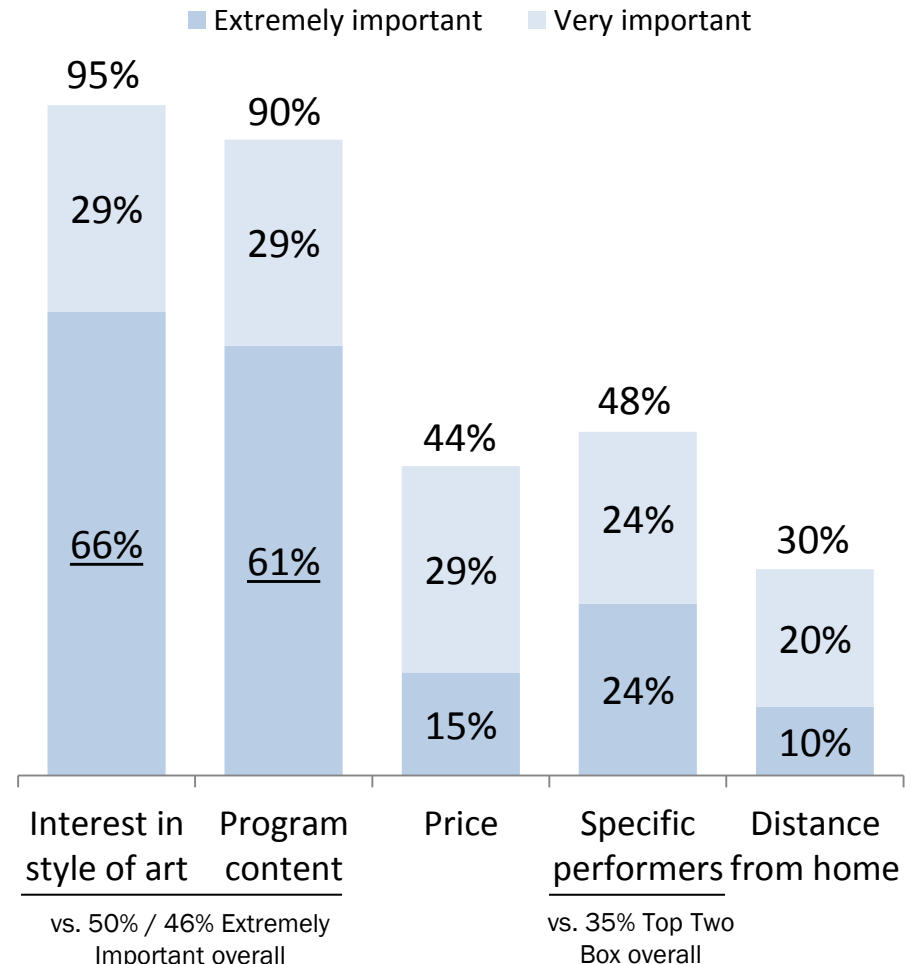
Dual Income Varsity Parents Motivation and Importance

Top Three Motivating Factors

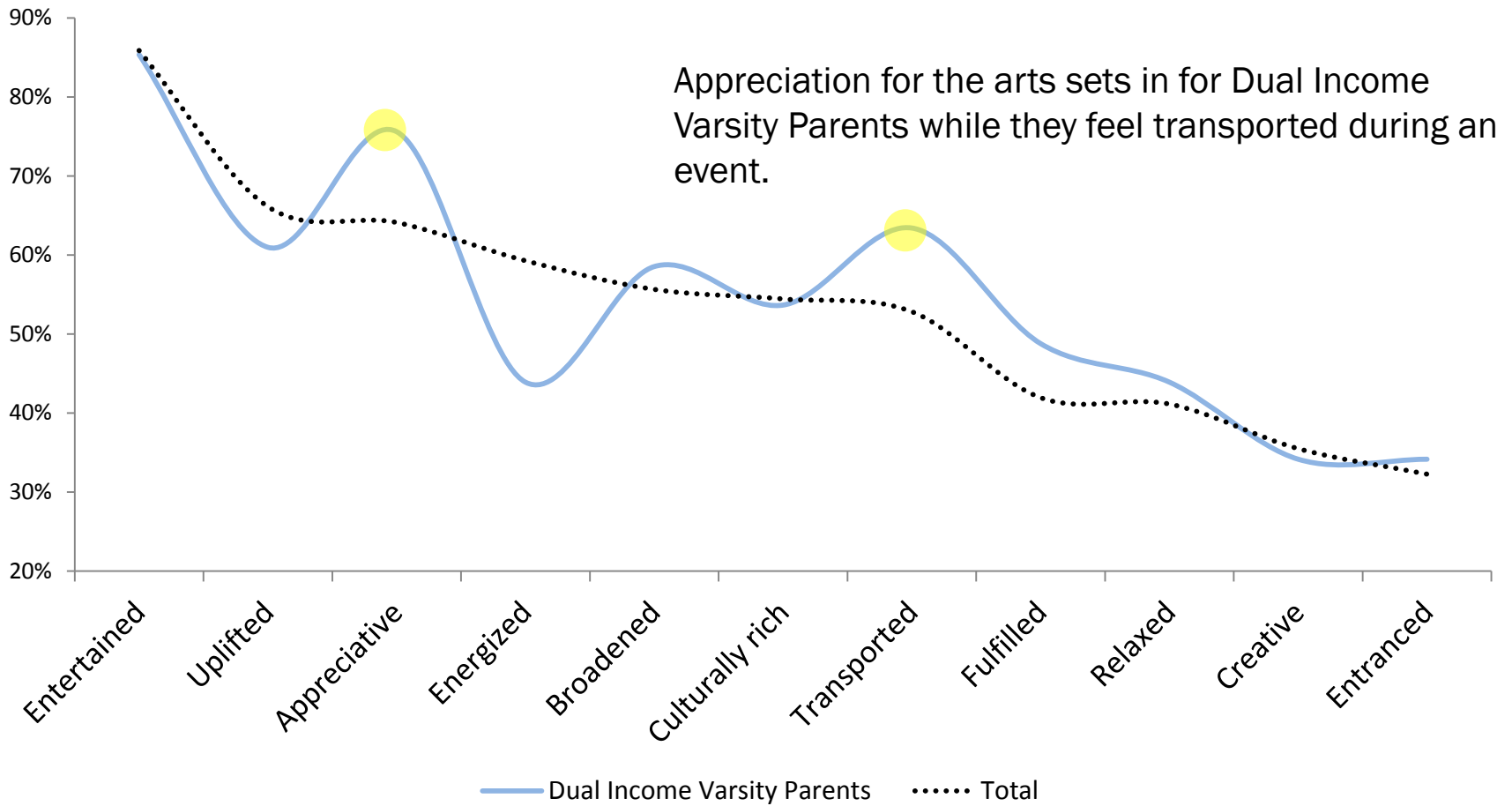
- 1 Lift my spirits (73%)
- 2 Inspire me (68%)
- 3 Provide social opportunities with family or friends (41%)



Where ever we lived, we had season tickets. When the kids were young we had little money, but would always do birthdays and Christmas events. It was always a treat for the kids and us too. They went to see Shakespeare when they were 12. Now, we take our boys and their families.



Dual Income Varsity Parents Emotions Experienced



Q16. When you attend an art or cultural event, how does that make you feel?
25% or less of the total survey sample felt the following emotions therefore they are not shown: In touch, Sophisticated, Beautified, and Intense
Dual Income Varsity Parents compared to total survey sample = 248

Dual Income Varsity Parents

Benefits Received

AESTHETICS

- The arts create beauty and preserve it as part of culture (49% 1ST/2ND)

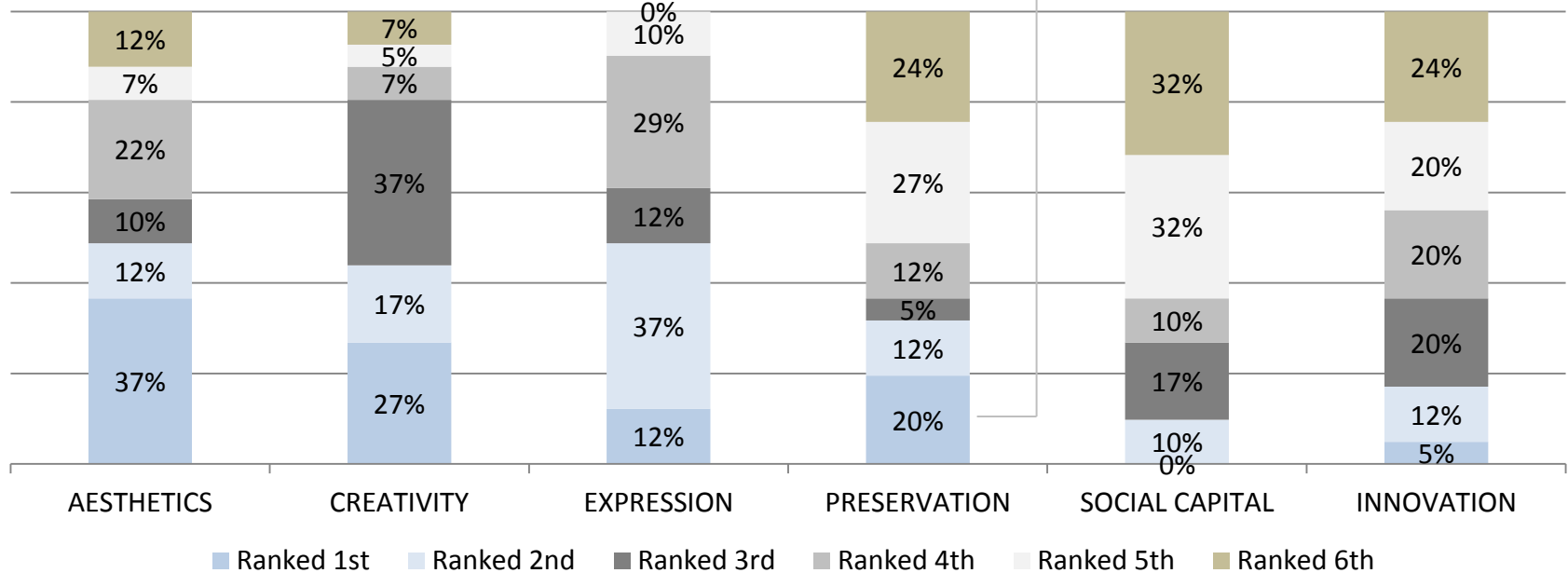
EXPRESSION

- Artistic work lets us communicate our interests and visions (49% 1ST/2ND)

CREATIVITY

- The arts encourage creativity, a critical skill (44% 1ST/2ND which is strong compared to overall)

The benefit of Preservation strongest for this group (vs. 10% 1st overall)



Dual Income Varsity Parents: Positive Practices Paige

Celebrating is a theme for us lately, my husband is hitting a milestone birthday this month, our daughter is going to end the school year with honors, and I'm getting another promotion at work. It's an exciting time for our bunch. We're planning a dinner party for a few close friends, and then in a few weeks, we're going to a theatrical event with my sister and her family as well. As busy as we are, we believe victories, even the small ones, should be celebrated. And, with so much to choose from in Atlanta, why not? The cultural landscape seems broader than it used to be. Going to cultural events has been a long-standing tradition in our family, and we're finding ourselves going to different kinds of performances than in years past. But, if I know there is a specific performance that I like coming up or maybe even someone particular that I want to see, then that event automatically jumps to the top of our list.

My interest in the arts began with my parents. They originally planted the seed, and my mother made sure I was exposed to many art forms. They didn't have that same upbringing interestingly, but she wanted to make sure I knew about its existence. So, I think it starts early, and I'd like to think I did the same thing. We are planting the seeds, and my daughter is beginning to find a few genres that she loves, and she can hold on to that her whole life. Hopefully, she'll reflect back on her childhood with an appreciation for these exposures and traditions we've enjoyed.

We stay occupied and are rarely home. My husband likes to say we are as ambitious in our personal lives as we are in our work lives. Maybe we are ambitious across the board, but, that's the way we like it, and as long as everyone's smiling, I don't see us changing a single thing.



RESIDENCE: Dunwoody

MARRIED: Yes

CHILDREN: Yes (teenager)

CURRENT HHI: \$175,000-\$249,000

AFFLUENT BOOMERS

9%

Atlanta Multi-Buyer Cohort



TRG Clusters:

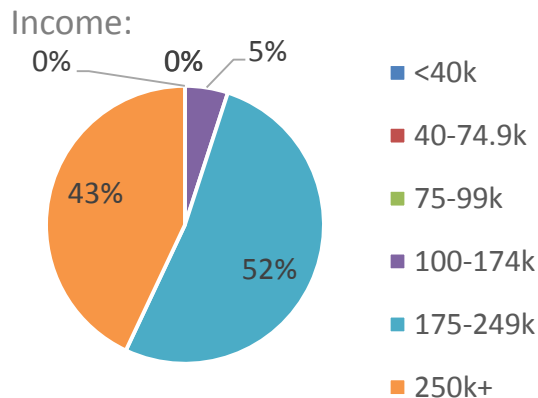
Affluent Boomers (9% of Atlanta Multi-Buyer Cohort)

378

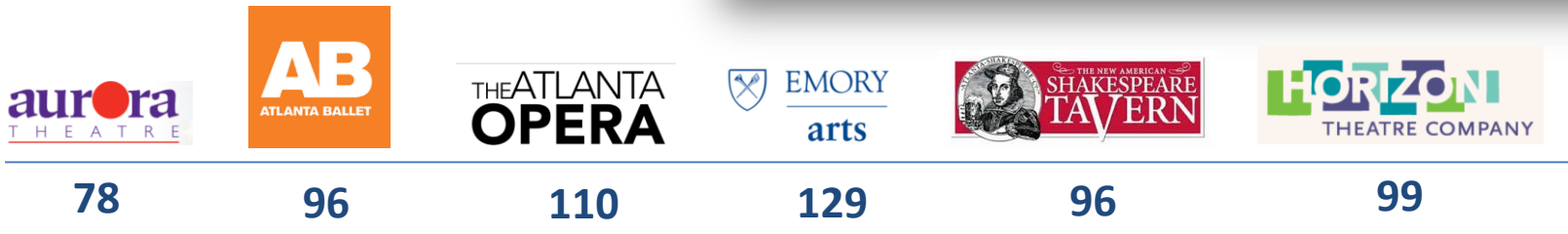
In Data Set

62

Average Age



Attendance indexed
across the data set for each company:



Affluent Boomers

Married, well-established Boomers

- Second smallest cohort
- Relatively mature
 - 69% between ages 54-75
- Highest income group
 - 95% earn \$175k+
 - All have a net worth of \$500k+
- Highly educated
 - 51% have a graduate degree
- Overwhelmingly married
 - 83% married or inferred
- Highest self-reported interest in the arts of the six cohorts
- Most heavily caucasian cohort

Fast Facts	
% of Database:	9%
Primary Age: 54-75	69%
Income: \$175k+	95%
Net worth: \$500k+	100%
Education: Grad/College	78%
Married or Inferred: Yes	83%
Working Woman: Yes	54%
Interest in Arts: Self-reported	18%
Ethnicity: Caucasian	93%

TR
ARTS

Affluent Boomers Residential Zip Codes

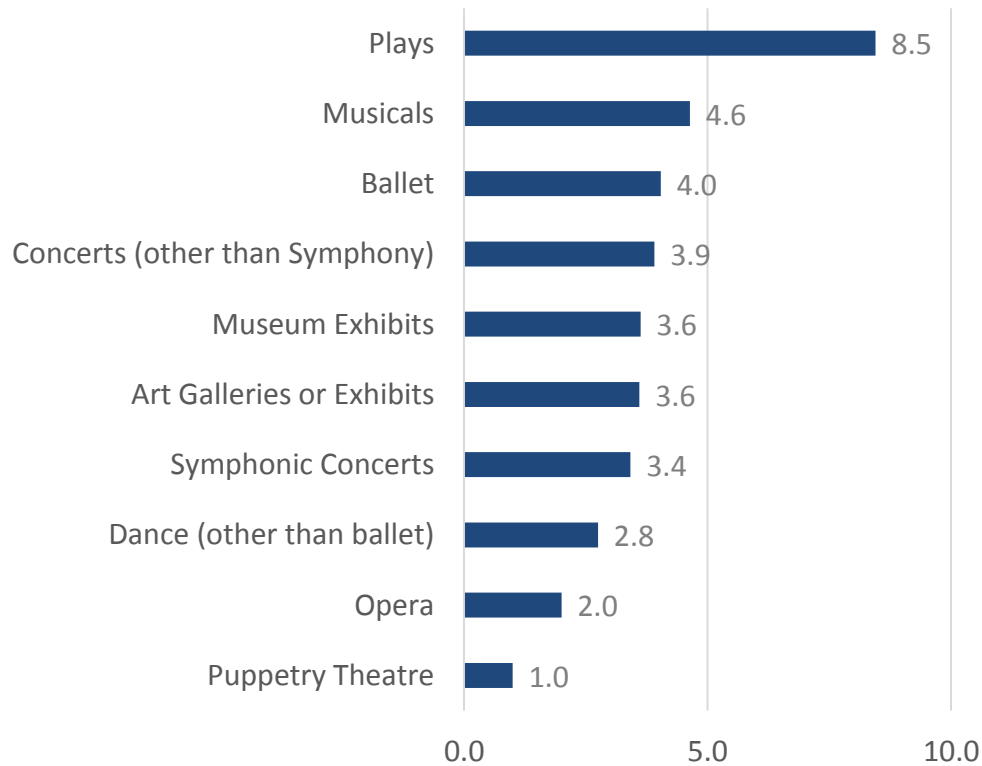
Clusters identified by TRG

Residential zip codes contained in record used to plot geographic concentrations.

Affluent Boomers

Performance Summary

Arts or Cultural Events Attended in Past 12 Months:



Other Atlanta Events Attended in Past 12 Months:

- 7stages
- Actor's Express
- Atlanta Contemporary
- Atlanta Lyric
- Balalaika Society
- Booth Museum
- Carlos Museum
- Cobb Energy Center
- GA Ensemble
- Georgia Festival Chorus
- High Museum
- Museum of Design
- OnStage Atlanta
- Out of town venues
- SCADfash
- Serenbe Playhouse
- Synchronicity
- The Fox Theatre
- Theatrical Outfit
- True Colors
- Youth Dance Competition

Q2. For each of the following art or cultural events attended, please estimate how many events you attended in the last 12 months for each.

Q4r9oe: And, more specifically to Atlanta, which of the following have you attended in the past 12 months? - Other (please specify)

Among Affluent Boomers segment

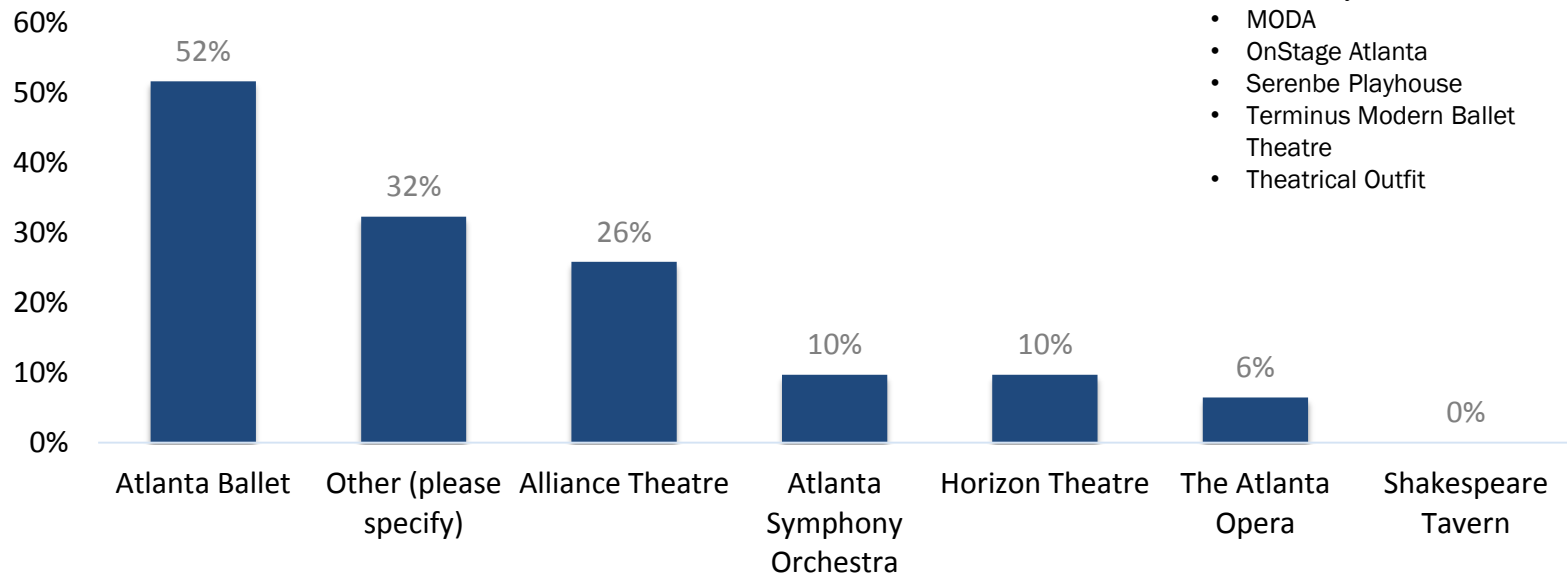
"Other" comments shown as written by respondent and shown in alphabetical order.

Affluent Boomers Member Summary

Season Ticket Holder, Member or Subscriber Most Recent Season:

Other Season Ticket
or Member Organizations:

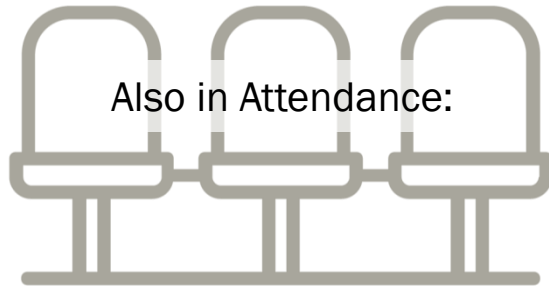
- Atlanta Lyric
- Broadway Series
- MODA
- OnStage Atlanta
- Serenbe Playhouse
- Terminus Modern Ballet Theatre
- Theatrical Outfit



26% Are not season ticket holders,
members or subscribers

Affluent Boomers

Atlanta Outlook and Entertainment



Also in Attendance:

- A spouse/partner (65%)
- Adult friend(s) (48%)
- Other family >18 years (26%)
- No one else / attend by myself (26%)
- All other groups 16% or less

Atlanta's Current Cultural Landscape

(65% Top Two Box vs. 62% total sample))



Atlanta's Cultural Growth Outlook

(most positive at 84% Expanding – Improving vs. 78% total sample)



Other Forms of Entertainment:



84%
Dinner



84%
Visiting with Friends
vs. 77% total sample



65%
Movies



42%
Charity
vs. 25% total sample



39%
Outdoor Activity

Affluent Boomers

Motivation and Importance

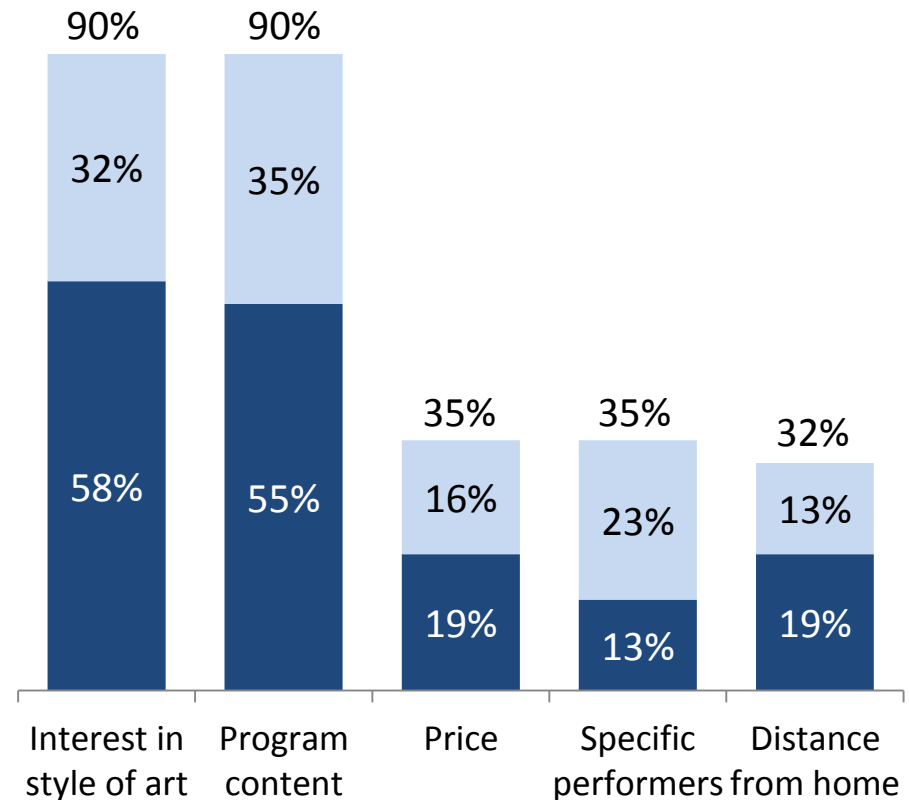
Top Three Motivating Factors

- 1 Lift my spirits (84%)**
Strongest cluster reporting this factor
(compared to 70% total sample)
- 2 Inspire me (71%)**
Strongest cluster reporting this factor
(compared to 63% total sample)
- 3 Take me to another place (48%)**

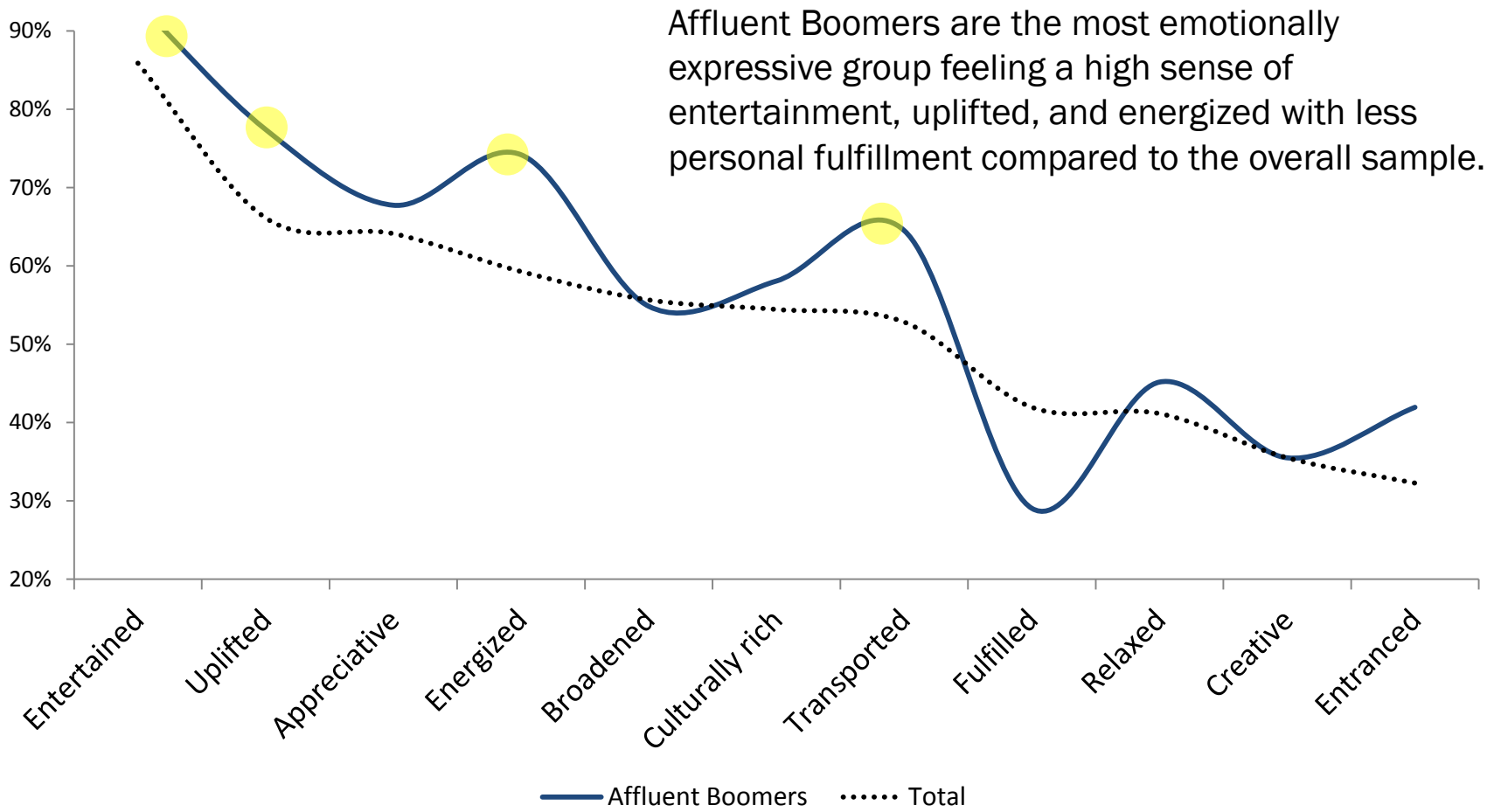
“

The beauty and perfection in the performance is like a glimpse of heaven, even for people with out that concept. The joy and lightness pulls you out of the heaviness and burdens of day-to- day life.

■ Extremely important ■ Very important



Affluent Boomers Emotions Experienced



Affluent Boomers Benefits Received

AESTHETICS

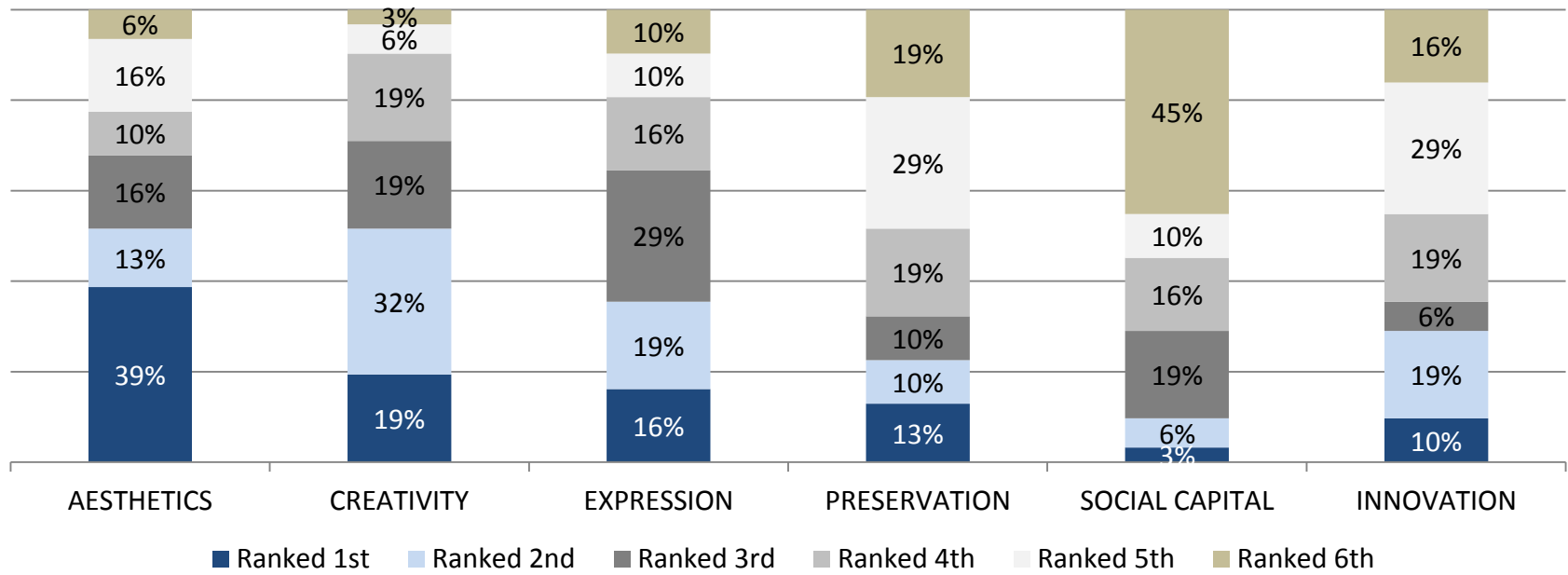
- *The arts create beauty and preserve it as part of culture (52% 1ST/2ND)*

EXPRESSION

- *Artistic work lets us communicate our interests and visions (35% 1ST/2ND)*

CREATIVITY

- *The arts encourage creativity, a critical skill (51% 1ST/2ND)*



Affluent Boomers: Stimulated Supportive Sarah

At this point, my husband and I certainly know who we are – there's no pretenses or pretending. Looking back, I doubt we knew our true selves when we met in graduate school - we were just trying to get past the next final. But, maybe in our 30s or even perhaps our 40s we finally figured it out. Now, we stay true to ourselves and do things that make us sincerely happy and the people around us happy. Attending art events is part of that. We get so much from an event – we walk away feeling lighter with a refreshed outlook. Sometimes, they are thought-provoking discussion pieces that inspire communication that would not have typically taken place. Along with being simply entertained, the arts make us feel, and that keeps us energized.

We've been in Atlanta long enough to notice a shift in the cultural arts scene. To us, it seems like it's exploded – there are so many universities, for example, that also offer terrific arts. We seek out the most exciting and stimulating – it's an environment we love to absorb.

Charitable organizations are another area where I spend my time. We've always supported the arts, but we also contribute to educational programs, some political candidates we like to get behind, in addition to some environmental and social organizations. And, I spend a good bit of our Sunday at church with the youth ministries.

Retirement is around the corner, and we're excited but also unsure of what we'll do with so much time. We're planning to take a grand vacation to mark the event, and I'd imagine volunteering more of my time to those charities that mean the most.



RESIDENCE: Chastain Park

MARRIED: Yes

CHILDREN: Yes (out of home)

CURRENT HHI: \$250,000+

SINGLE PARENT STRIVER

5%

Atlanta Multi-Buyer Cohort

Note: Caution should be used when interpreting findings for this segment as sample sizes can be small



TRG Clusters:

Single Parent Striver (5% of Atlanta Multi-Buyer Cohort)

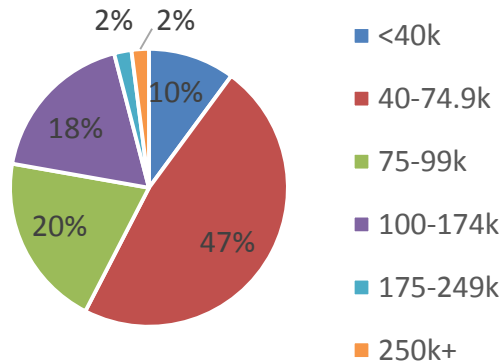
237

In Data Set

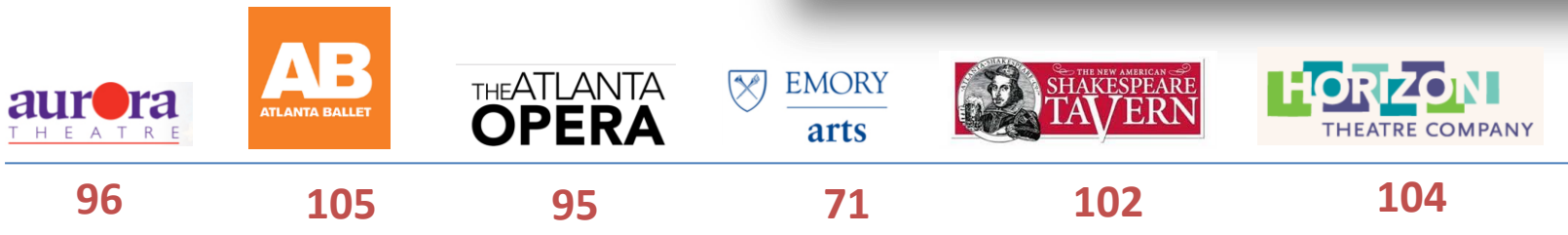
47

Average Age

Income:



Attendance indexed across the data set for each company:



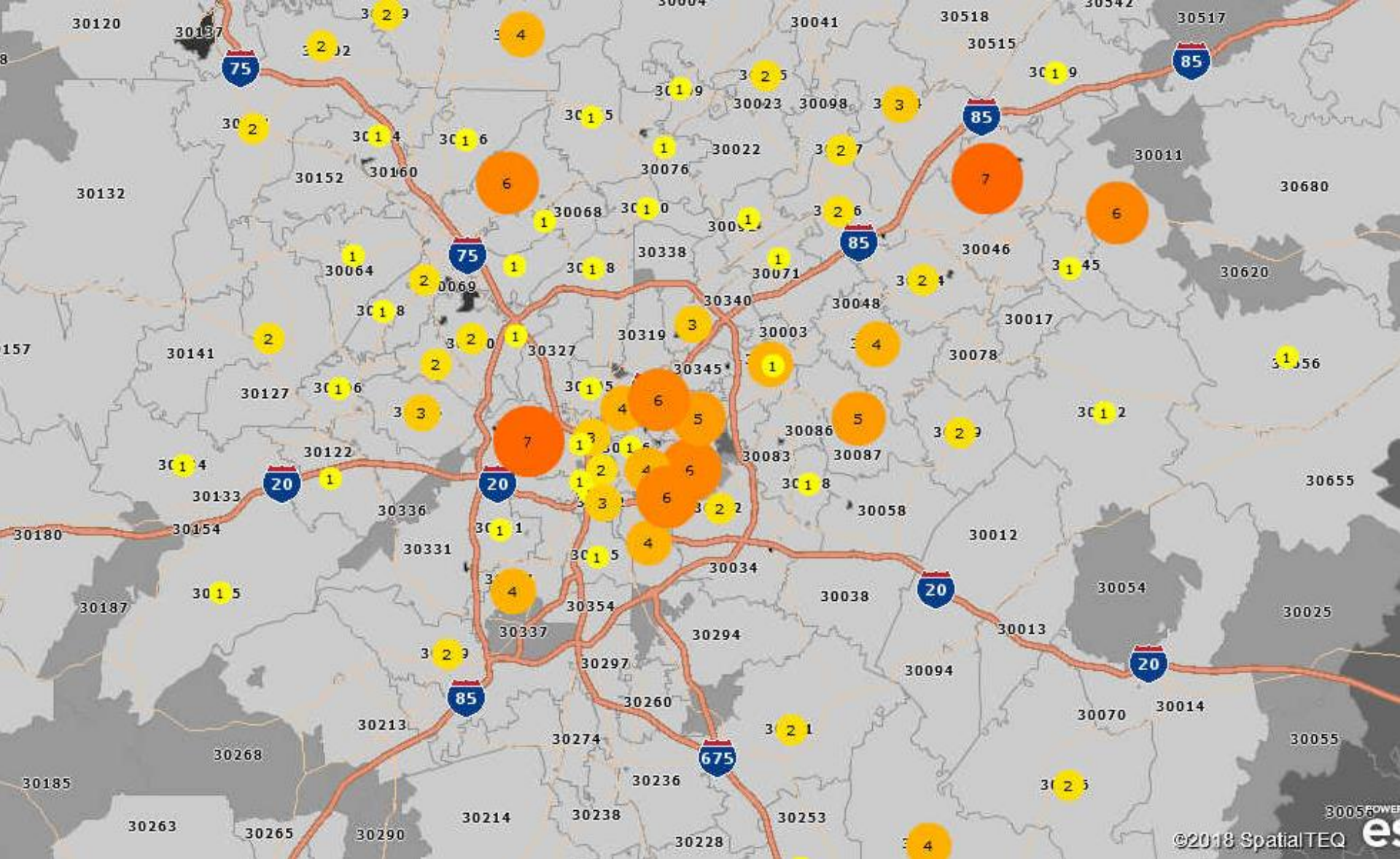
Single Parent Strivers

Diverse middle class, middle-age single parent families

- Smallest cluster group
 - 5% of multi-buyers
- Youngest of the six clusters
 - 66% between ages 32-55
- Lowest wealth ranges
 - 79% earn \$45k-\$125k
 - 93% net worth \$25k - \$250k
- Education levels lowest of the 6 multibuyer cohorts
 - 49% have high school degree, but no collegiate or graduate education
- Primarily single parents
 - 99% have children living at home, but only 5% indicated as married
- Lowest self-reported interest in arts
- Most ethnically diverse group of the six clusters
 - 18% African-American

Fast Facts	
% of Database	5%
Primary Age: 32-55	66%
Income: \$45k - \$125k	79%
Net worth: \$25k - \$250k	93%
Education: HS or College	81%
Married or Infer. Marr: No	95%
Children Present: Yes	99%
Interest in Arts: Self-reported	8%
Ethnicity: Caucasian	75%





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Single Parent Striver Residential Zip Codes

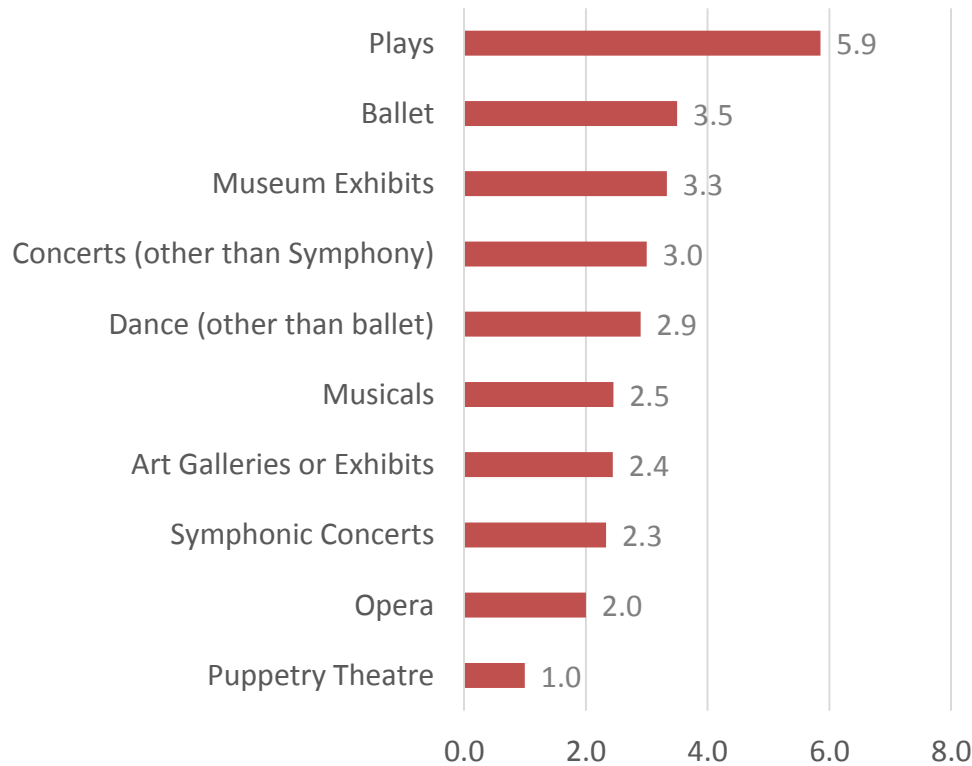
Clusters identified by TRG

Residential zip codes contained in record used to plot geographic concentrations.

Single Parent Strivers

Performance Summary

Arts or Cultural Events Attended in Past 12 Months:



Other Atlanta Events Attended in Past 12 Months:

- 7 Stages
- Actor's Express
- Broadway in Atlanta
- Dad's Garage
- Dance Canvas
- Full Radius
- HD performances of opera & ballet
- Terminus Modern Ballet Theatre
- The Georgia Ballet
- Theatrical Outfit
- True Colors

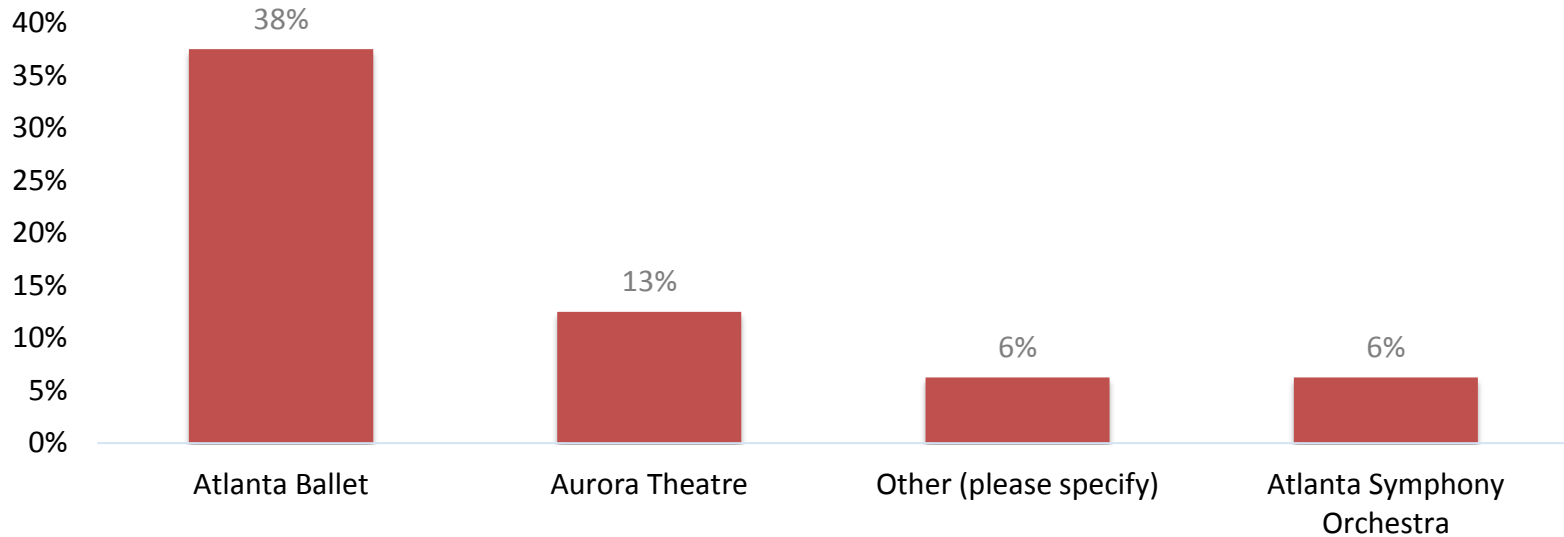
Q2. For each of the following art or cultural events attended, please estimate how many events you attended in the last 12 months for each.
 Q4r9oe: And, more specifically to Atlanta, which of the following have you attended in the past 12 months? - Other (please specify)
 Among Single Parent Strivers segment
 Note: Caution should be used when interpreting findings for this segment as sample sizes can be small
 "Other" comments shown as written by respondent and shown in alphabetical order.

Single Parent Striver Member Summary

Season Ticket Holder, Member or Subscriber Most Recent Season

Other Season Ticket
or Member Organizations

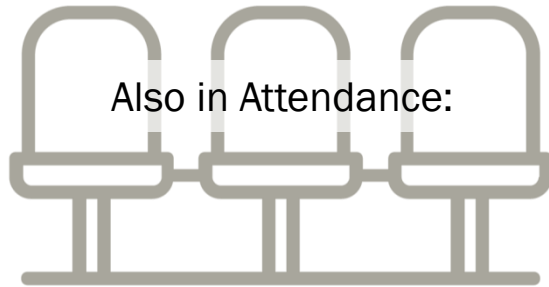
- Broadway Series at FOX



56% Are not season ticket holders,
members or subscribers

Single Parent Strivers

Atlanta Outlook and Entertainment



Adult friend(s) (81% vs. 62% total)

Other family >18 years (50% vs. 31% total)

No one / attend by myself (38% vs. 23% total)

A date (38% vs. 8% total)

A spouse/partner (31%)

Co-worker(s)/client (31% vs. 10% total)

All other groups 19% or less



88%
Dinner



81%
Visiting with Friends



75%
Movies



75%
Outdoor Activity
vs. 42% total sample

Atlanta's Current Cultural Landscape

(44% Top Two Box vs. 62% total sample))

Dissatisfied



Satisfied

Atlanta's Cultural Growth Outlook

(75% Expanding – Improving vs. 78% total sample)

Declining



Expanding

Single Parent Striver Atlanta Background

21.1 Years

Length of time lived in the Greater Atlanta area
(compared to 28.5 years for the total sample)



25% Moved within Atlanta
(compared to 7% for the total sample)

Single Parent Strivers

Motivation and Importance

Top Three Motivating Factors

1 Lift my spirits (75%)

2 Inspire me (69%)

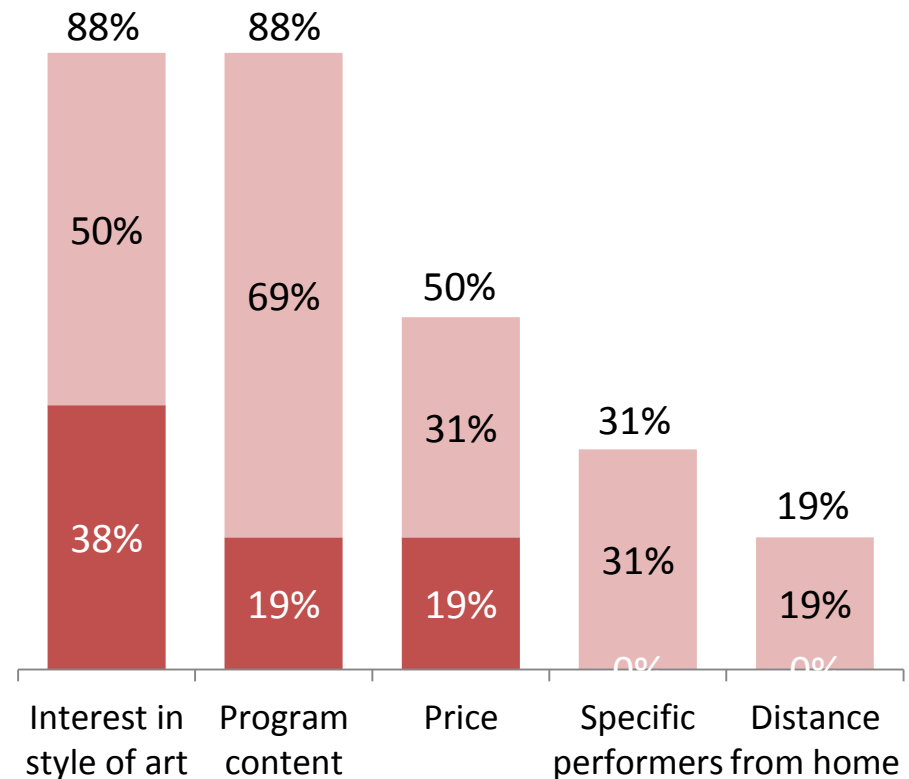
3 Provide social opportunities with family or friends (50%)

Strongest cluster reporting this factor
(compared to 40% total sample)

4 Take me to another place (50%)

Strongest cluster reporting this factor
(compared to 35% total sample)

■ Extremely important ■ Very important



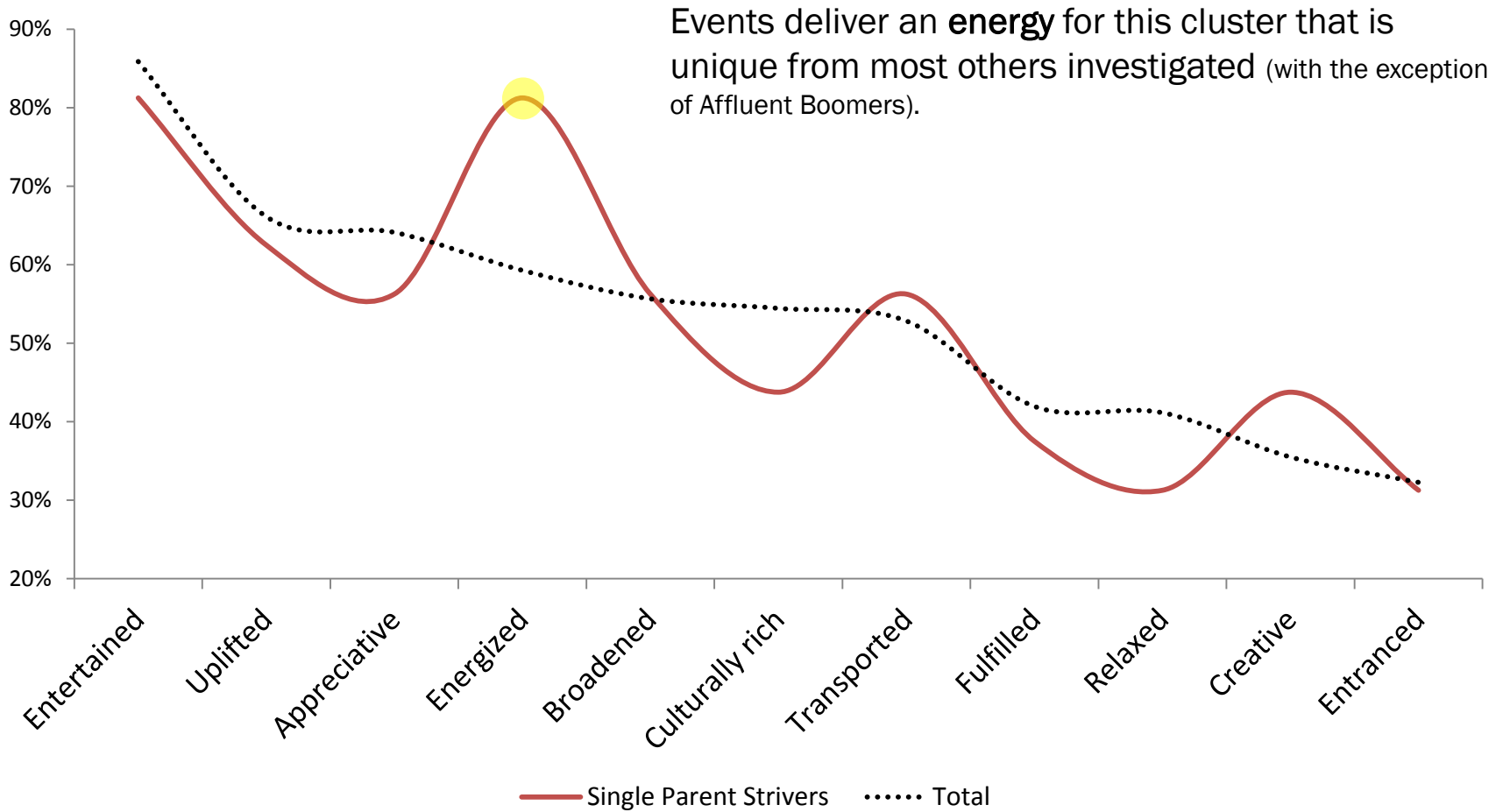
Q12a. How important are each of the following when making a decision regarding which events you may or may not attend?

Q13a. Please select the top three reasons that most closely align with your motivation to attend art and cultural events.

Single Parent Strivers compared to total survey sample = 248

Note: Caution should be used when interpreting findings for this segment as sample sizes can be small

Single Parent Strivers Emotions Experienced



Q16. When you attend an art or cultural event, how does that make you feel?
 25% or less of the total survey sample felt the following emotions therefore they are not shown: In touch, Sophisticated, Beautified, and Intense
 Single Parent Strivers compared to total survey sample = 248
 Note: Caution should be used when interpreting findings for this segment as sample sizes can be small

Single Parent Strivers

Benefits Received

AESTHETICS

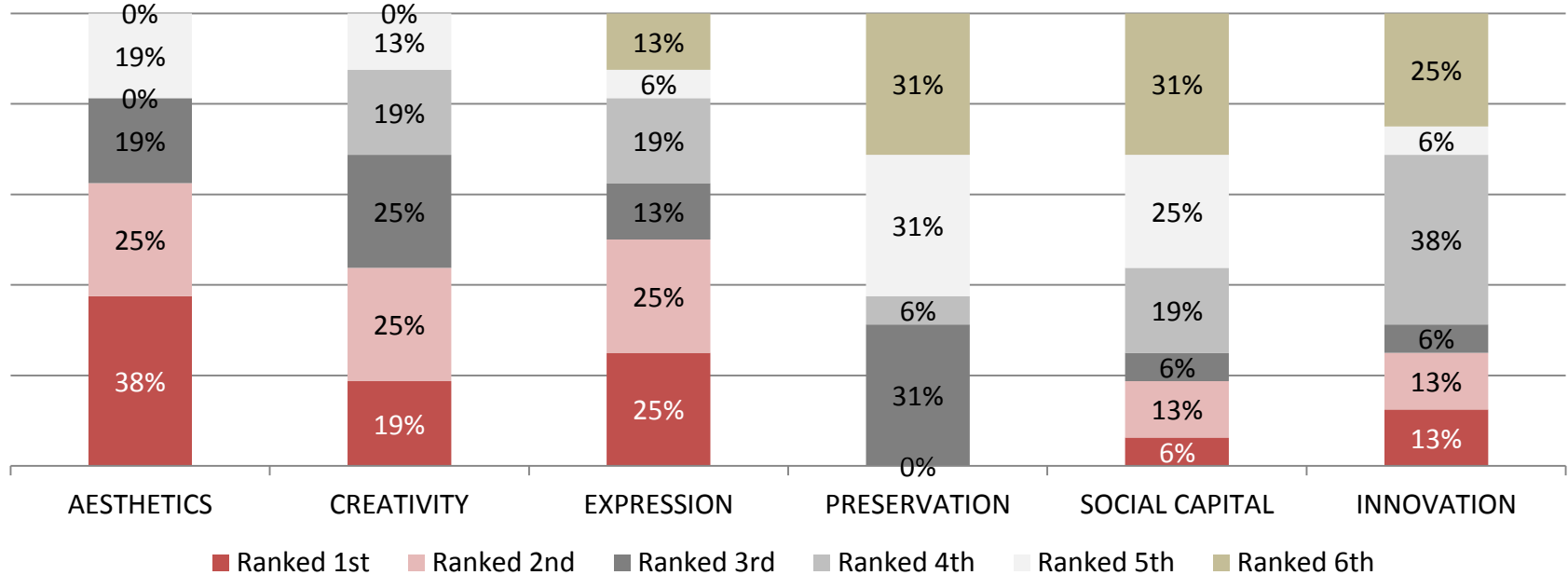
- *The arts create beauty and preserve it as part of culture (63% 1ST/2ND)*

EXPRESSION

- *Artistic work lets us communicate our interests and visions (50% 1ST/2ND)*

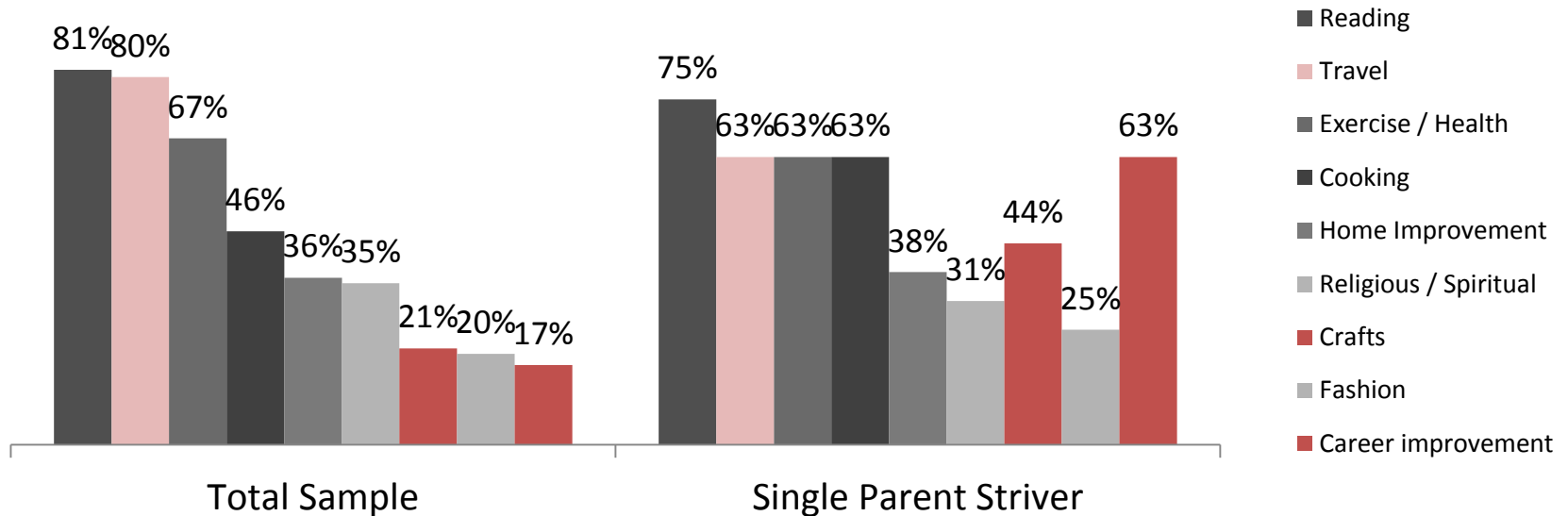
CREATIVITY

- *The arts encourage creativity, a critical skill (44% 1ST/2ND)*



Single Parent Strivers

Additional Interests

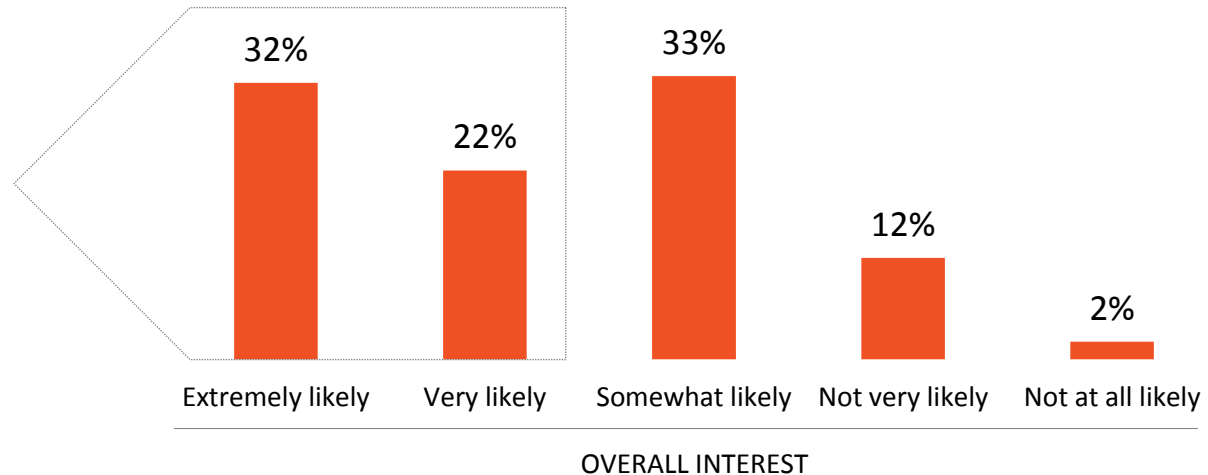


There is stronger interest in **Career Improvement** (63%) compared to the total sample. Additionally, this segment expresses more interest in **Crafts** (44%) and slightly less in **Travel** (63% compared to 80% overall).

ADDITIONAL DISCOVERIES

Broadening the Audience

54%
Extremely / Very Likely



The existing audience could be a useful advocate as more than half (54%) say they would be extremely or very likely to invite someone new – especially through a voucher offering.

74%
Extremely (48%) /
Very Likely (26%)

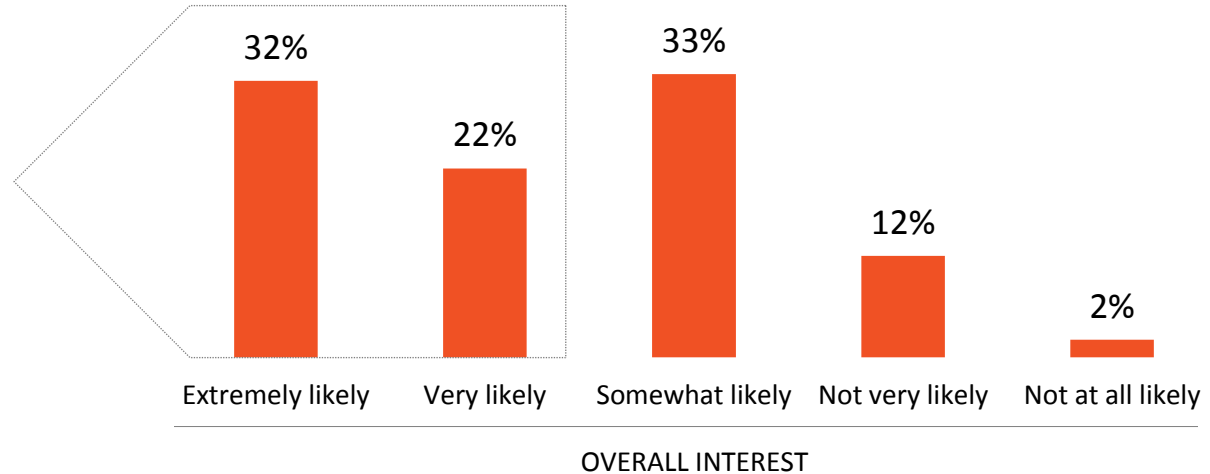
COMPLIMENTARY
VOUCHER FOR A FRIEND TO
ATTEND, AWARDED BY YOU

Voucher preferred over other suggestions such as:

- Behind the scenes insight discussion into the performance with Director or Choreographer for you and a new-to-the-arts guest (44% Top Two Box)
- Invitation from the performing company for backstage “Green Room” passes or pre-show reception for you and a new-to-the-arts guest (40% Top Two Box)

Broadening the Audience

54%
Extremely / Very Likely



Which clusters feel most passionate about this?

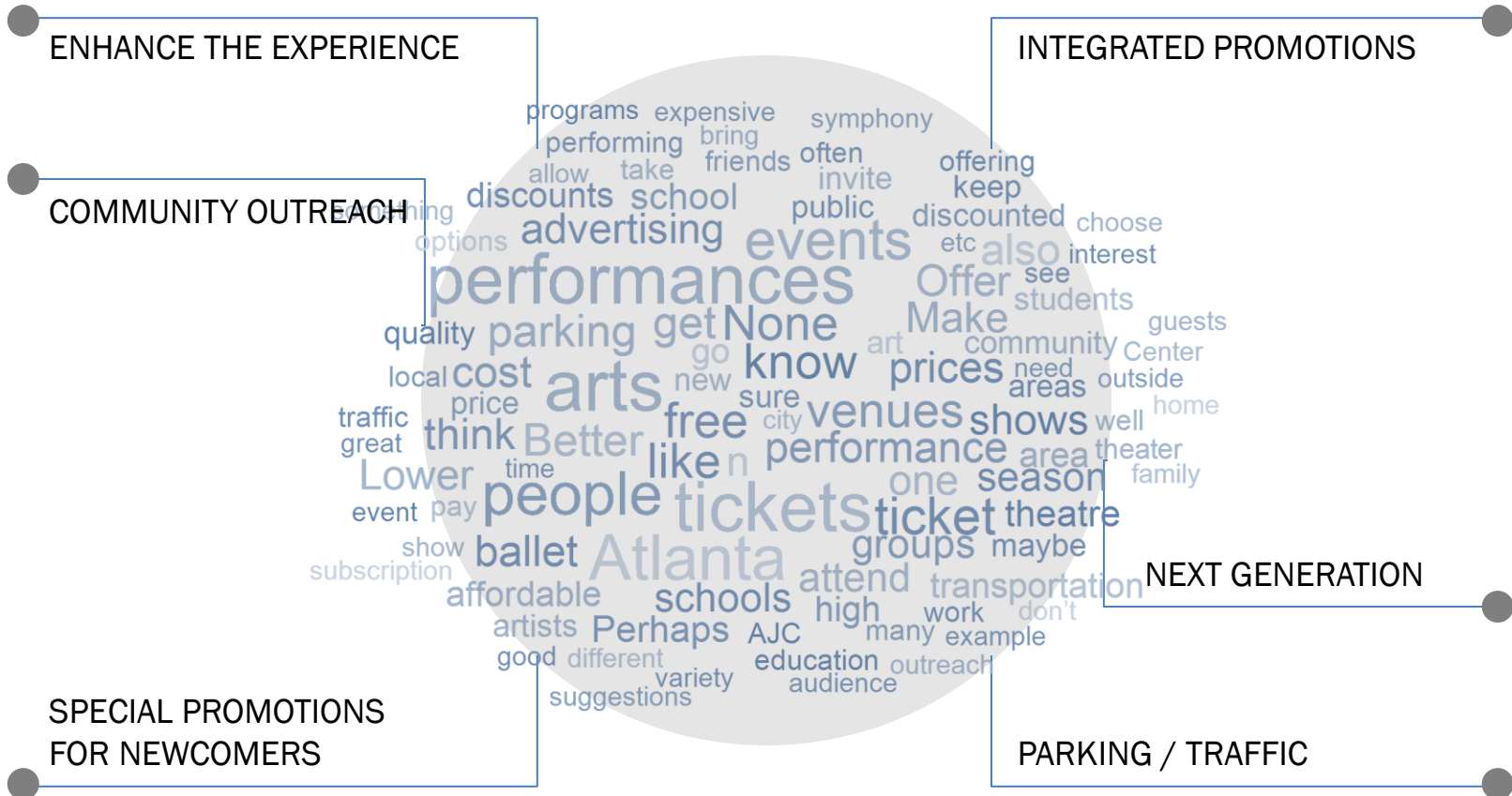
Dual Income Varsity Parents

46%
Extremely Likely
(66% Top 2 Box)

Single Income Varsity Parents

43%
Extremely Likely
(55% Top 2 Box)

Broadening the Audience



Broadening the Audience

ENHANCE THE EXPERIENCE

*“Meet and greet, photo ops with artists, **drink vouchers.**”*

*“Recently, I attended the Atlanta Ballet and there were drinks and food available along with a DJ playing music in the lobby before the show. It was quite festive and the **audience was having a great time.** I went home and ordered tickets for a ballet in May. Many **choral concerts have receptions after for the audience.** Very enjoyable experience to go with the music.”*

*“Gatherings that allow people to **minge and socialize** and discuss the arts or performances.”*

“Complementary glass of wine prior to performance.”

COMMUNITY OUTREACH

*“Include or reach out to the working class person, police, veteran, teachers who are in contact with the public everyday. **Word of mouth is very powerful.**”*

*“Perhaps offering some of the **local senior centers the opportunity to bring guests.**”*

NEXT GENERATION – PRICE SENSITIVITY

“Encourage school field trips to performances and tours. Make the entrance fee for these groups as low as possible.”

“Keep prices lower so young people can learn about the arts.”

“Offer deeper discounts for College students

Broadening the Audience

SPECIAL PROMOTIONS FOR NEWCOMERS

*“Maybe an **introductory ticket price?**”*

*“I have been able to attend more ballets than I normally would be able to thanks to the generous **Veterans Ticket Program sponsored by Home Depot**. My teenage daughter is a dancer and being able to take her to these ballets is such a treat. Perhaps there are other Veterans ticket programs I don’t know about for other Atlanta arts, or if not, they could be implemented. Or, perhaps a free or reduced ticket program for current young performing artists so that they are being exposed to Atlanta performing arts.*

*“When **pre-show discussions** are held for the ballet it has been incredible to allow guests that I’ve invited learn more about ‘why’ a piece is significant. **Simply saying it is a world-premiere means very little to someone first being introduced to ballet.**”*

INTEGRATED PROMOTIONS

*“Advertise **ALL arts productions in a calendar**. For instance, on a given weekend, all symphony, dance, museum, art and theater events are listed in one place. **If this already exists, it is not advertised enough.** Also, late summer/early fall when the season tickets are being pushed, have a free publication dedicated to the arts and performance in the metro area. It can be electronics as well as newsstand.”*

Broadening the Audience

PARKING / TRAFFIC

“Transportation and parking are issues. I don't go down to the Fox any longer because it is a logistic nightmare. I prepay parking at the Arts Center when I purchase season tickets. I no longer attend the Rialto or Ferst Center due to logistics also.”

“Food. Often the timing of rushing from work across town thru traffic means that either we're scrambling for food or spending a lot on a l-o-n-g evening out with multiple parking fees, etc. Part of the ease of taking people as guests to the Shakespeare Tavern is that there are affordable food and drink options on site, not just concessions or expensive cocktails.”

7th Unique Cluster Possible

Listed from Largest to Smallest

+

- 1 Carpools and Careers (33%)
- 2 Educated and Active Seniors (22%)
- 3 Single Income Varsity Parents (20%)
- 4 Dual Income Varsity Parents (12%)
- 5 Affluent Boomers (9%)
- 6 Single Parent Strivers (5%)

7

Demographics differences noted:

Generation:	GEN Y / GEN X
Marital Status:	Single / Newly Married
Children:	Not present
Employment:	Work Full-Time

7th Unique Cluster Possible

7

How do they spend their time?

- Work full days and have plans with friends or family once or twice a week
- Social outlets are important as well as networking events
- Can be budget conscious but place emphasis on experiences

"I get a lot of my tickets from GoldStar. They usually have tickets for half-price. I try to set aside a little money and time to do this [go to arts events]"

What do the arts mean to them?

- A way to recharge and be stimulated in a way they may not have otherwise have encountered in their daily lives while satisfying the craving for deep experiences

"I go to most shows on weeknights with my friends. Most of them are open to new events or experiences. Usually if they go with me one time, they are interested in going back. Just getting people in the door opens up a pathway!"

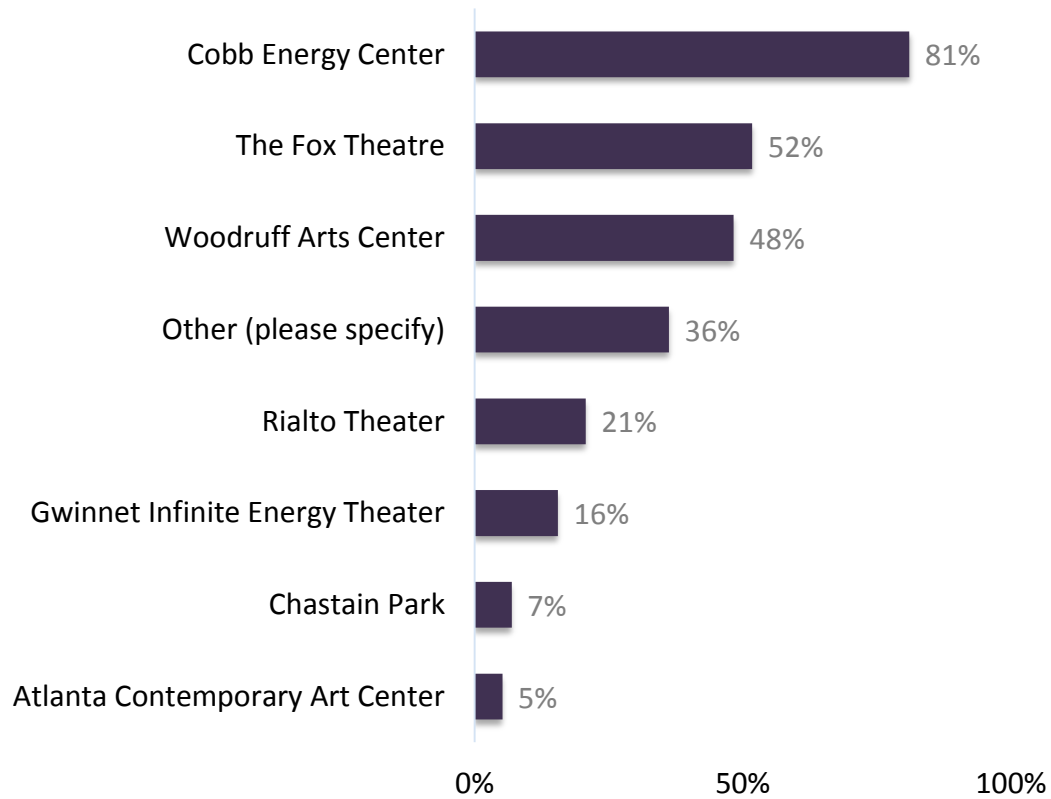
SEGMENT ATTENDANCE DETAILS

AS TIME ALLOWS

Carpools and Careers

Venue Summary

Venues Attended in Last 12 Months



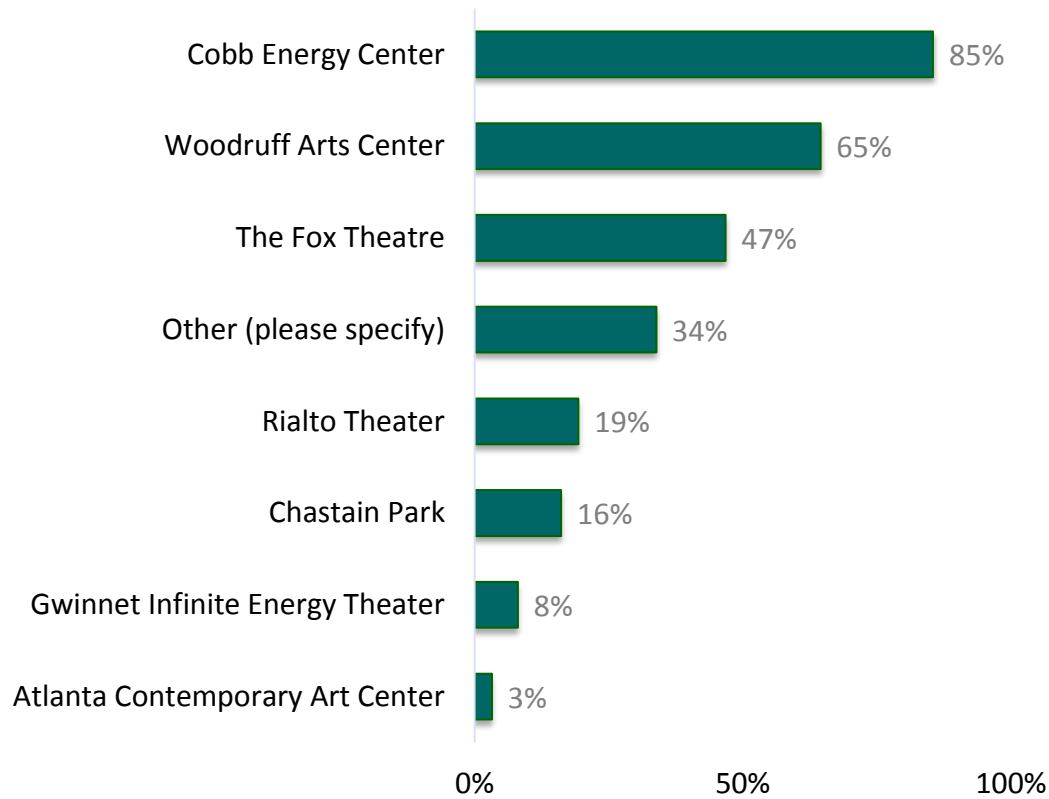
Other Venues

- Birmingham BJBB
- Cathedral of St.Philip
- Centre Stage
- Fernbank
- Ferst Center
- Local outdoor art shows
- Lucas Theatre in Savannah
- Marietta theater
- Oglethorpe University
- Outfront
- Paris on Ponce
- Peace Centre
- SCAD Show
- Serenbe
- Spivey Hall
- Tabernacle
- Theatrical Outfit/Balzer
- Variety Playhouse
- Various churches with concert seasons

Educated and Active Seniors

Venue Summary

Venues Attended in Last 12 Months



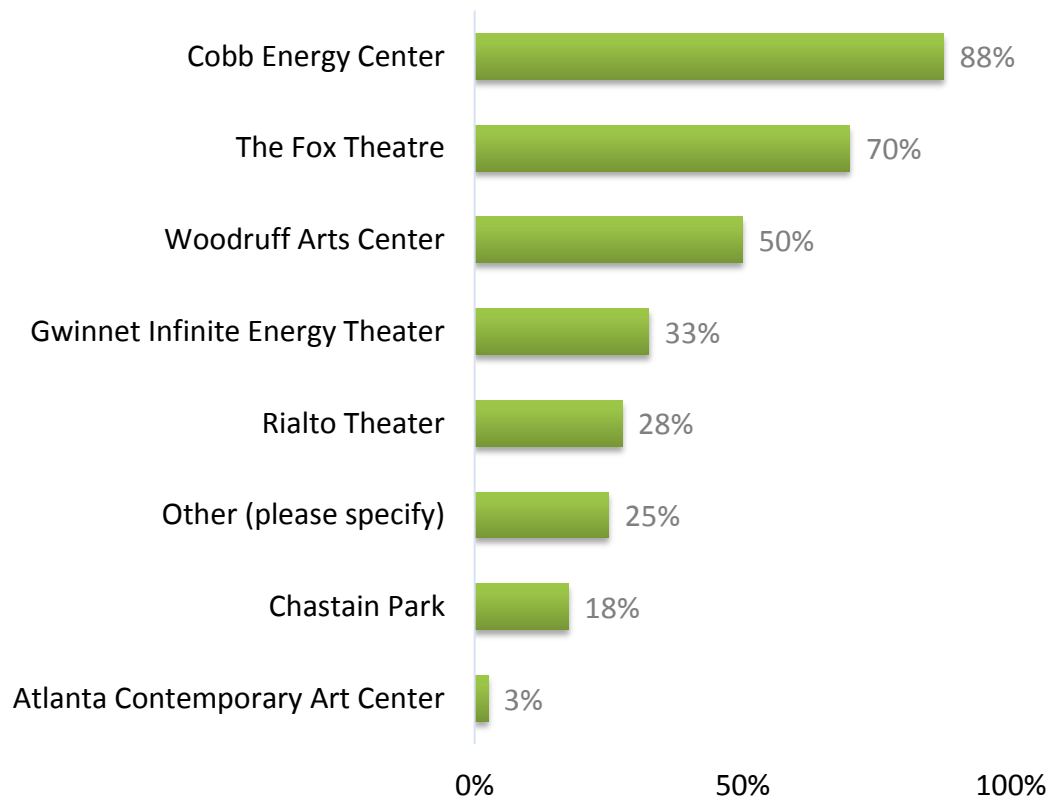
Other Venues

- Actor's Express
- Alliance
- Church buildings
- Eddies Attic
- Georgia Ensemble Theater
- High Museum
- King Plow
- Marcus center for the performing arts
- Marietta Arts Center
- Michal Carlos Museum
- Moda
- Oglethorpe Univ. Art Museum
- Philips arena
- Roswell Cultural Arts Center
- Sandler Hudson Gallery
- Schartz Center, Emory
- Schwartz Center
- Serenbe
- Spelman College Art Museum
- Spivey Hall
- Stage Door Players
- The Balzer
- Tom Key's Theatre
- Variety
- Verizon

Single Income Varsity Parents

Venue Summary

Venues Attended in Last 12 Months



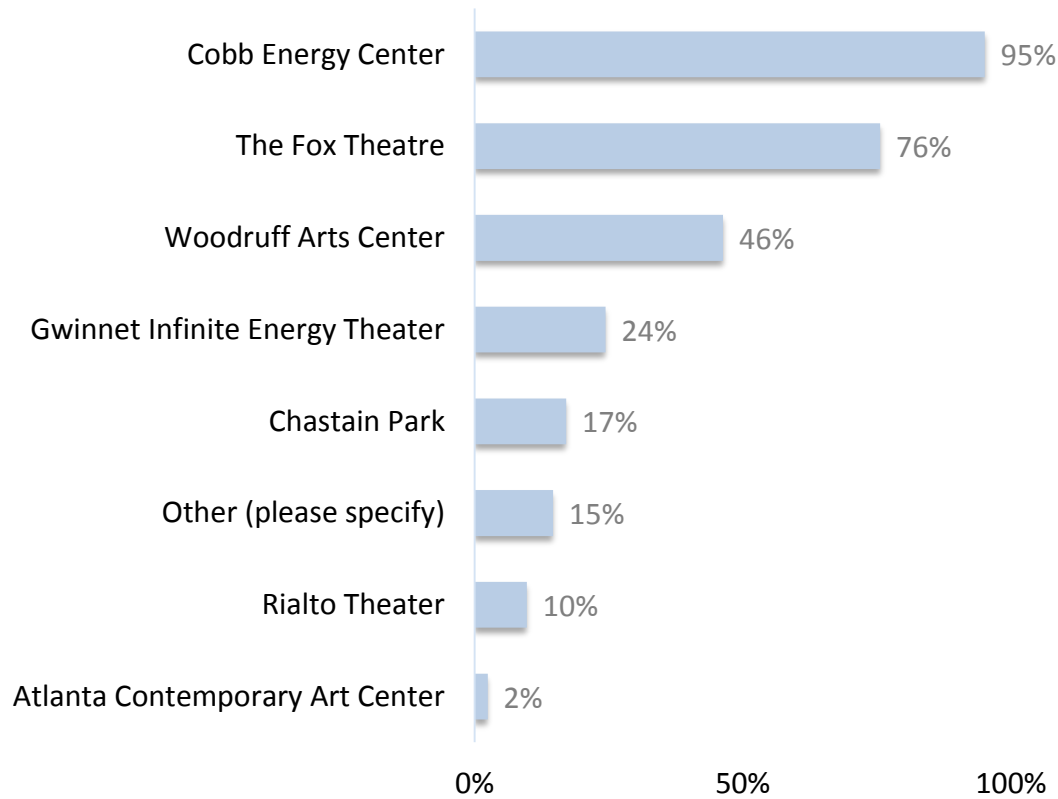
Other Venues

- Actor's Express
- ARTS @TECH
- Balser Theatre
- Dunwoody Arts Center
- Eddies Attic
- Ferst
- Horizon
- JC Methodist church
- Jewish Community Center.
- Kennedy Center in DC
- Places out of town
- Red Clay
- Roswell Arts Center
- Roxy
- Southwest Arts Center
- Spivey Hall

Dual Income Varsity Parents

Venue Summary

Venues Attended in Last 12 Months



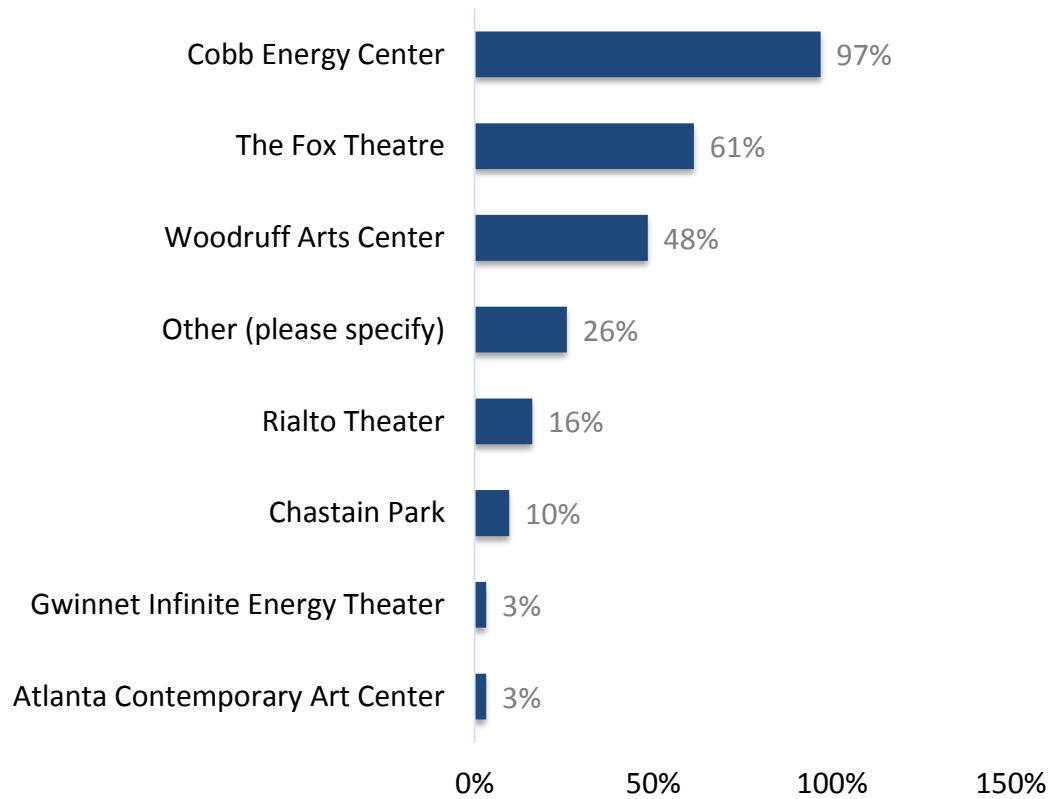
Other Venues

- Atlanta Botanical Gardens
- Atlanta Falcons
- Balzer Theatre
- City Winery
- Ferst Center for the Arts
- Gallaway School
- Jennie T. Anderson Theatre at Cobb Civic Center
- Marcus Jewish Community Center
- Phillips

Affluent Boomers

Venue Summary

Venues Attended in Last 12 Months



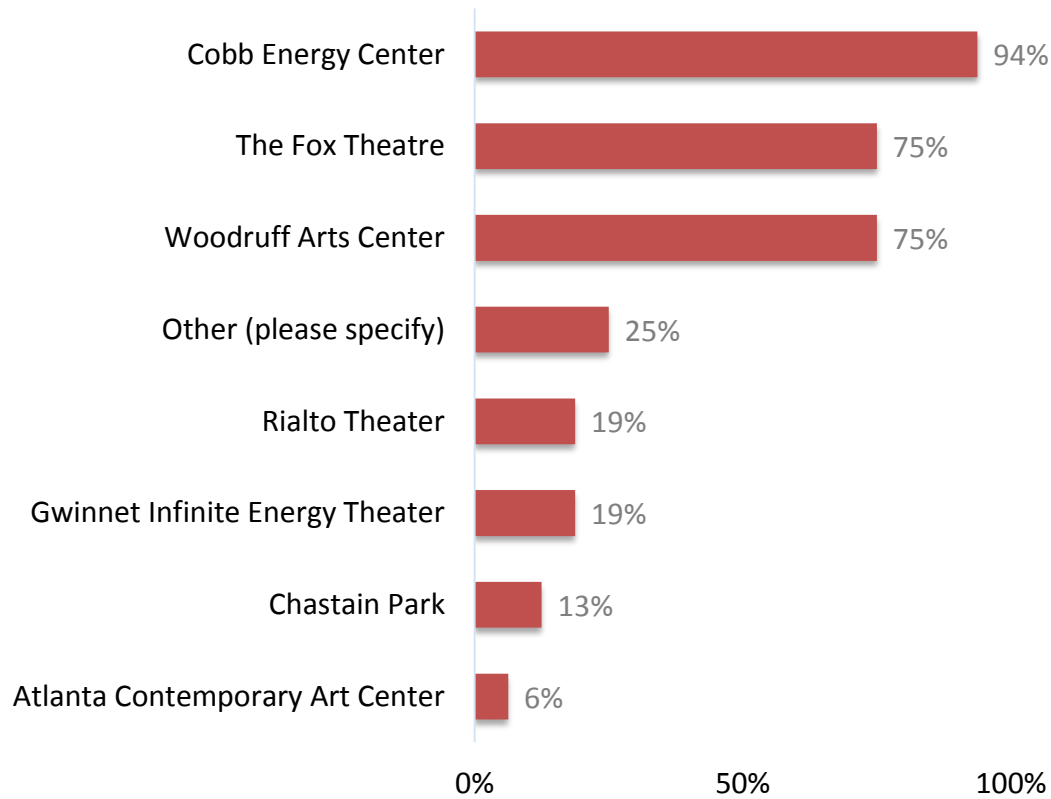
Other Venues

- Alliance all over
- Arts Center
- Booth Museum in Cartersville
- FOX
- Jennie T. Anderson Cobb
- Roswell Theatre
- Serenbe
- Synchronicity
- Theatrical Outfit
- Variety Theater
- Westside Cultural Arts Center

Single Parent Striver

Venue Summary

Venues Attended in Last 12 Months



Other Venues

- 7 Stages
- Broadway
- Carnegie Hall
- Emory Schwartz
- Ferst Center
- King Plow Center
- Lincoln Center
- Westside Cultural Arts Center

Q6. Which of the following venues have you attended in the past 12 months?

Among those in segment

Note: Caution should be used when interpreting findings for this segment as sample sizes can be small

"Other" comments shown as written by respondent and shown in alphabetical order.

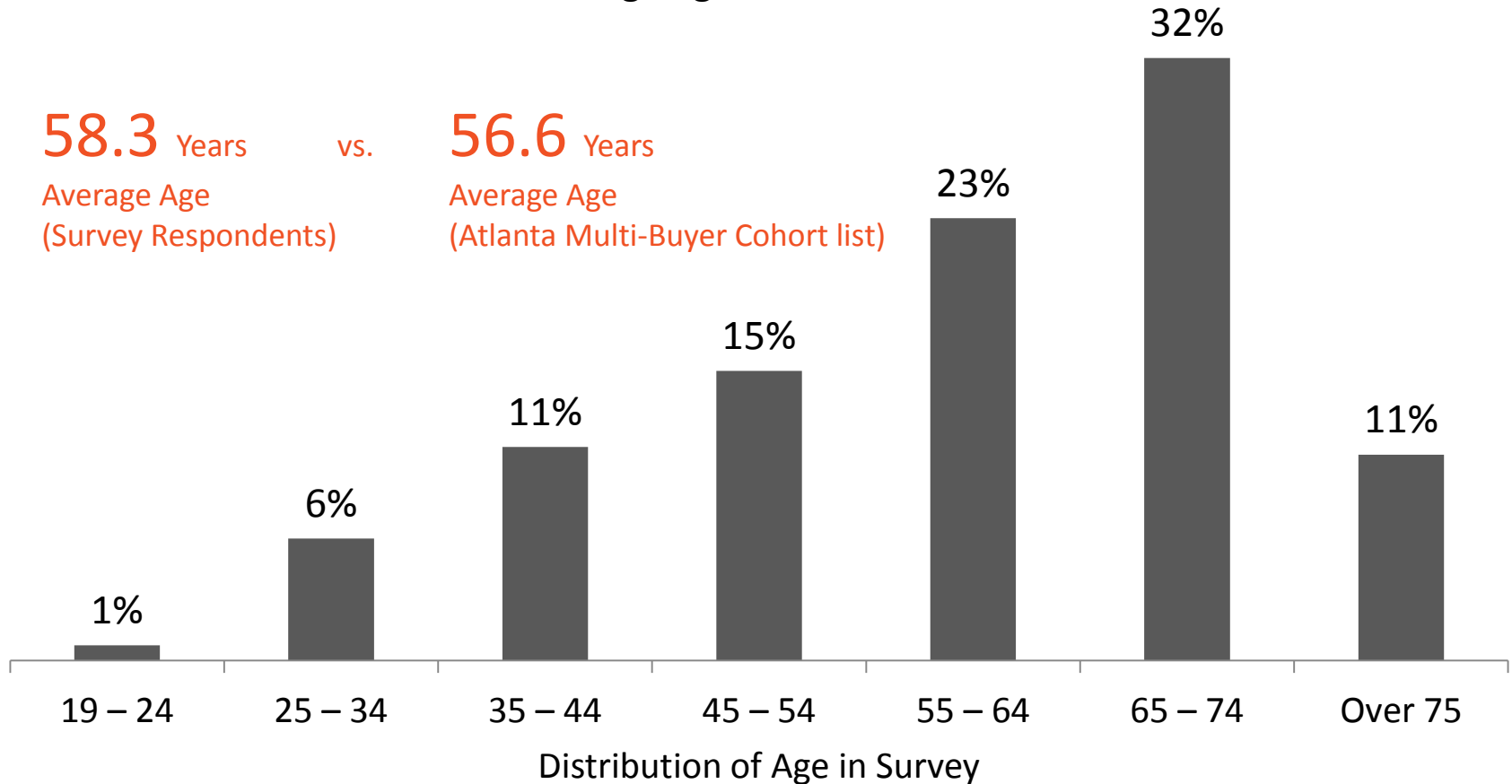
APPENDIX

APPENDIX

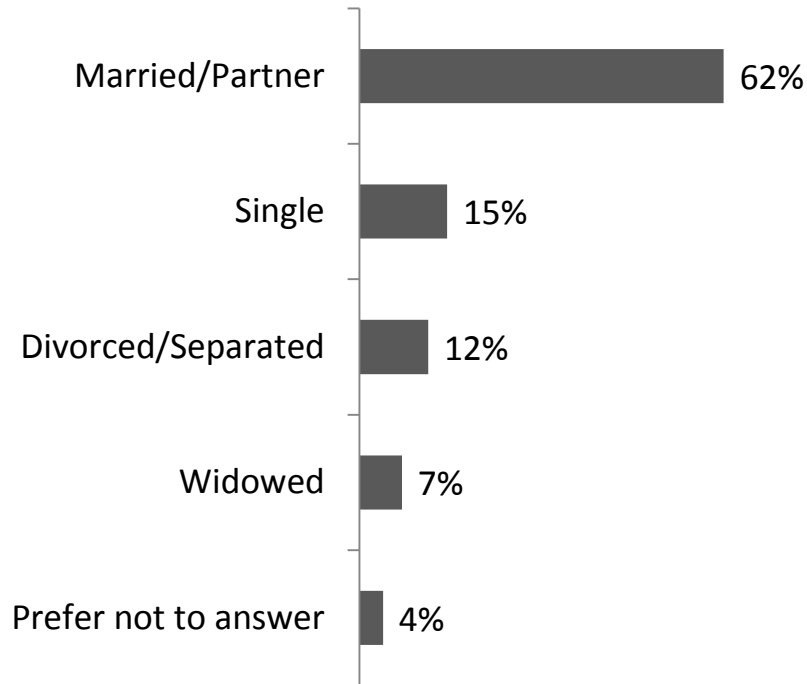
Demographics Data

Age

While it seems the sample skews older, when evaluating the overall invitation list, the average age similar.



Marital Status / Household Size



2.1

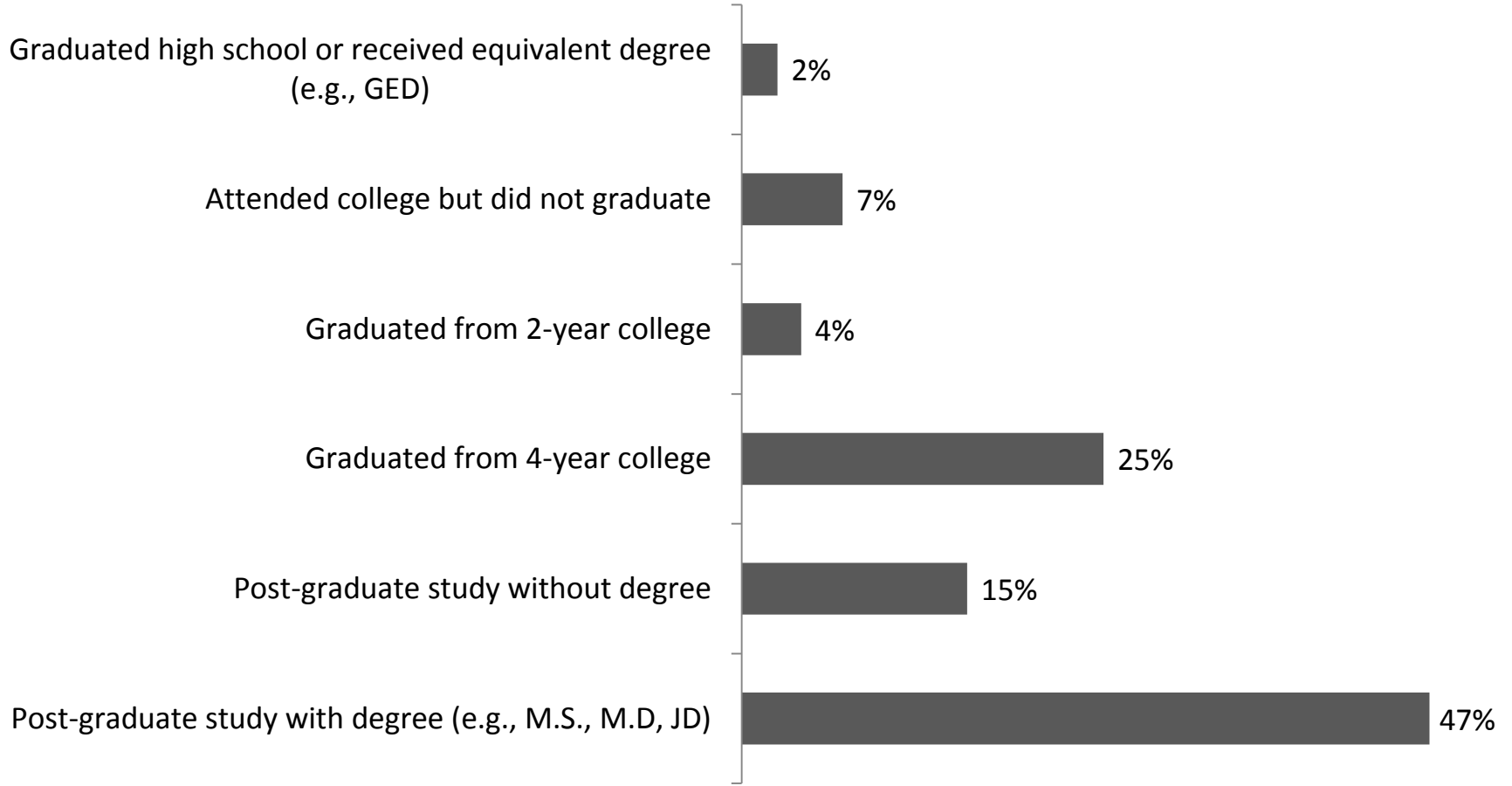
Average Number in Household

	%
One	30%
Two	48%
Three	9%
Four	8%
Five	2%
Six	1%

82%

Do Not Have Children
< 18 years in Household
(among those with more than one in HH)

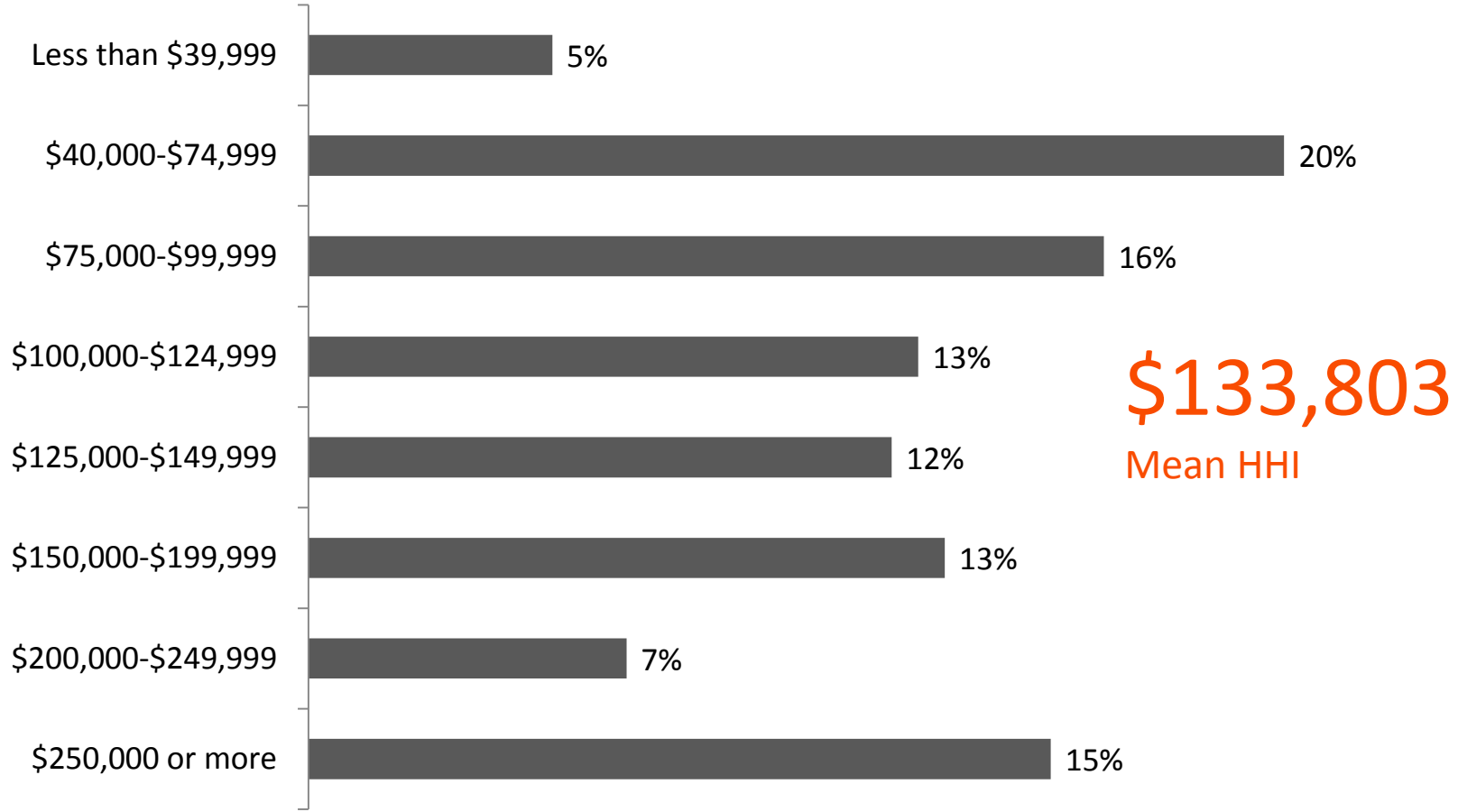
Education



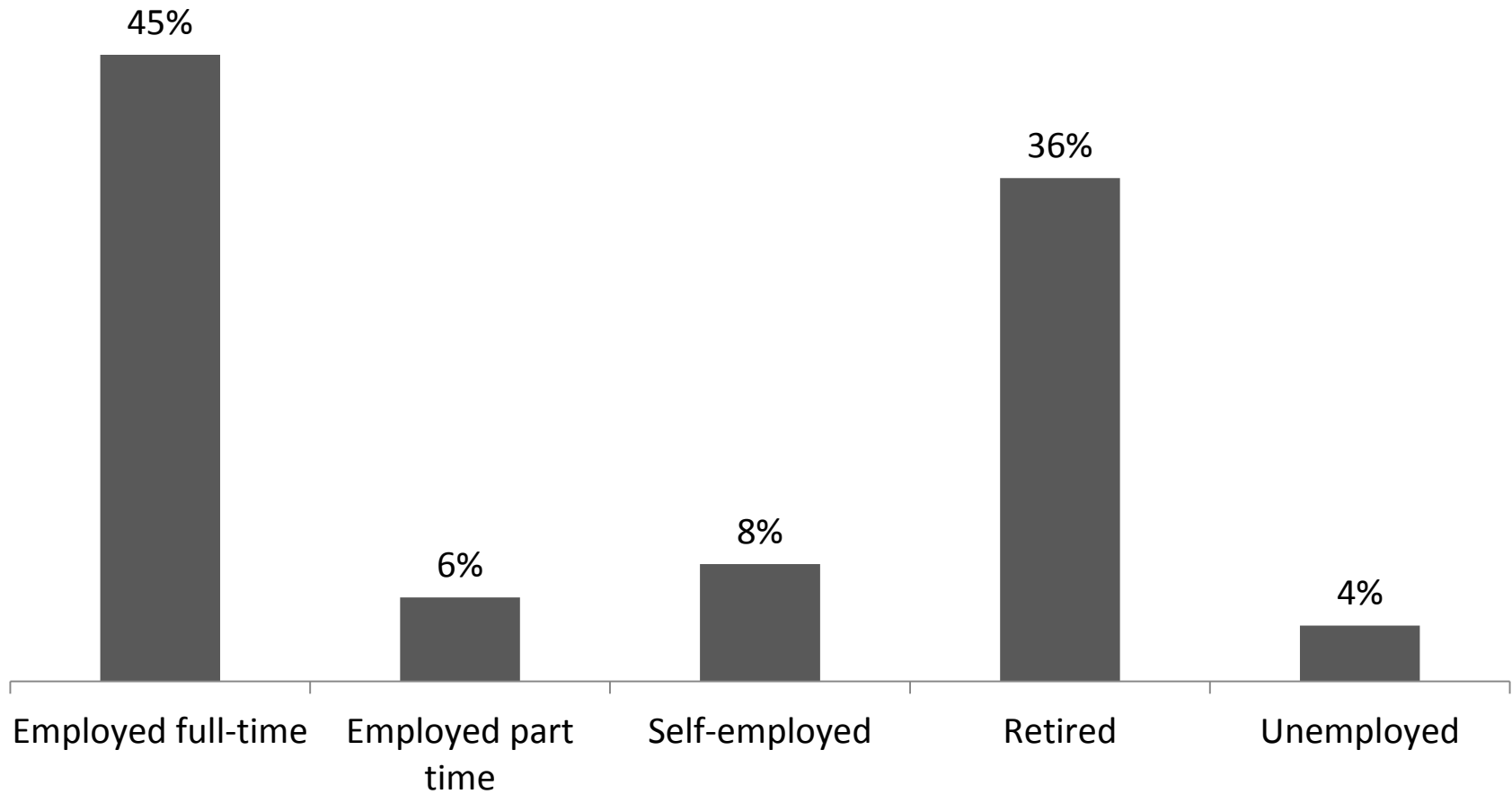
D6: What is the highest level of education you have completed or the highest degree you have received?

Base n = 248

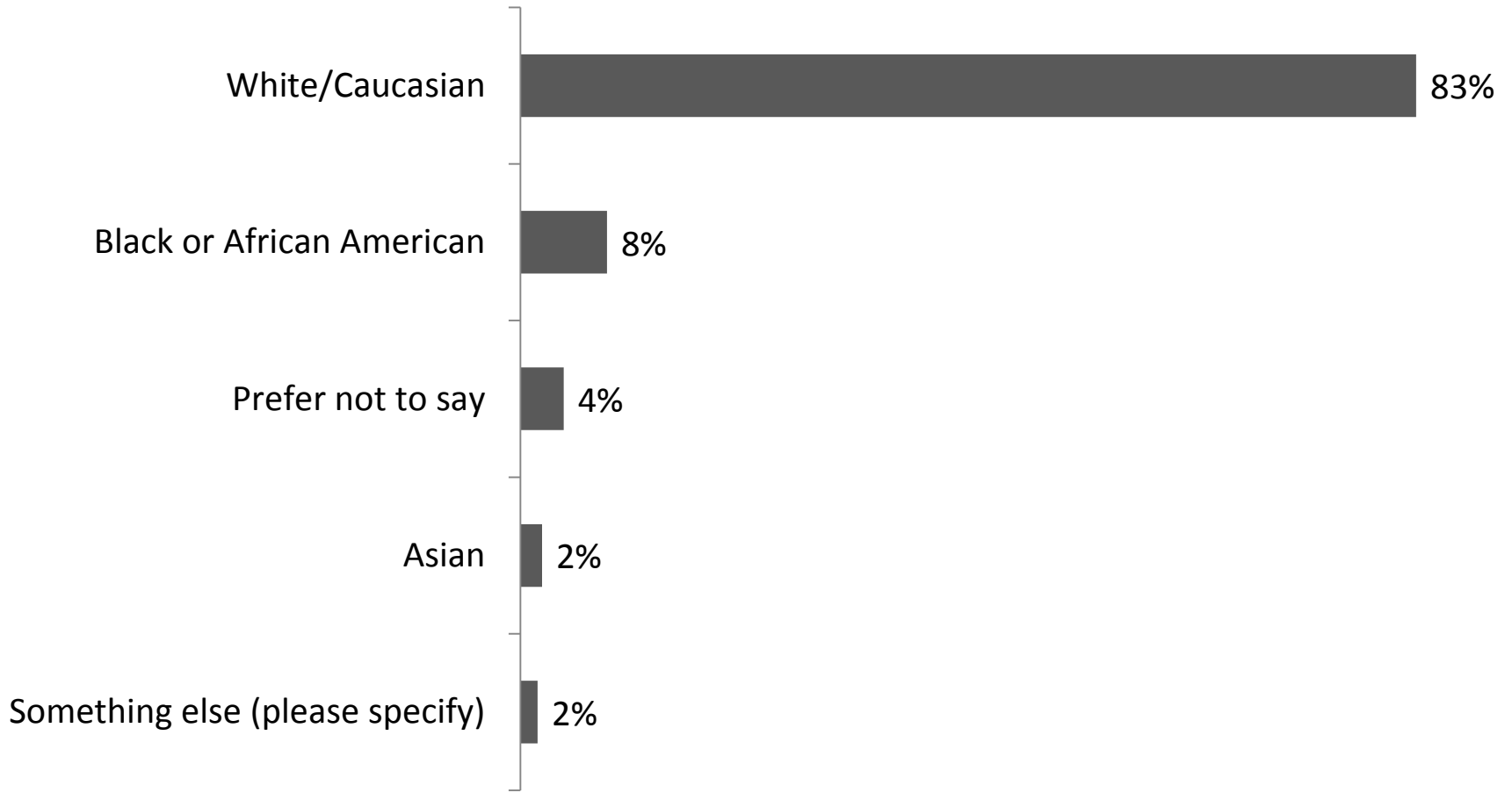
Annual Household Income



Employment Status



Ethnicity

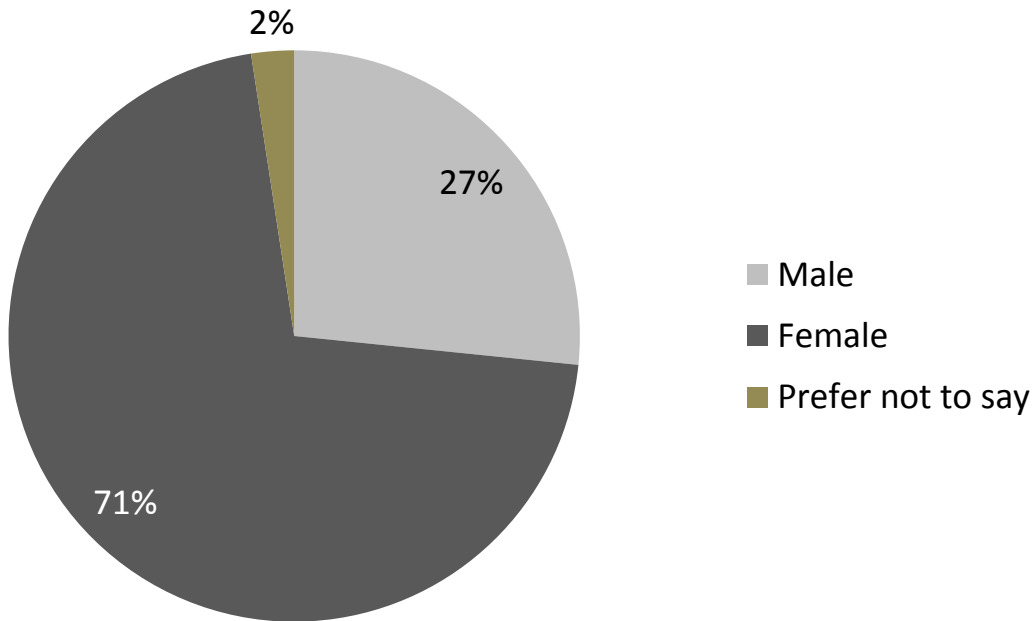


D9: How would you classify yourself?

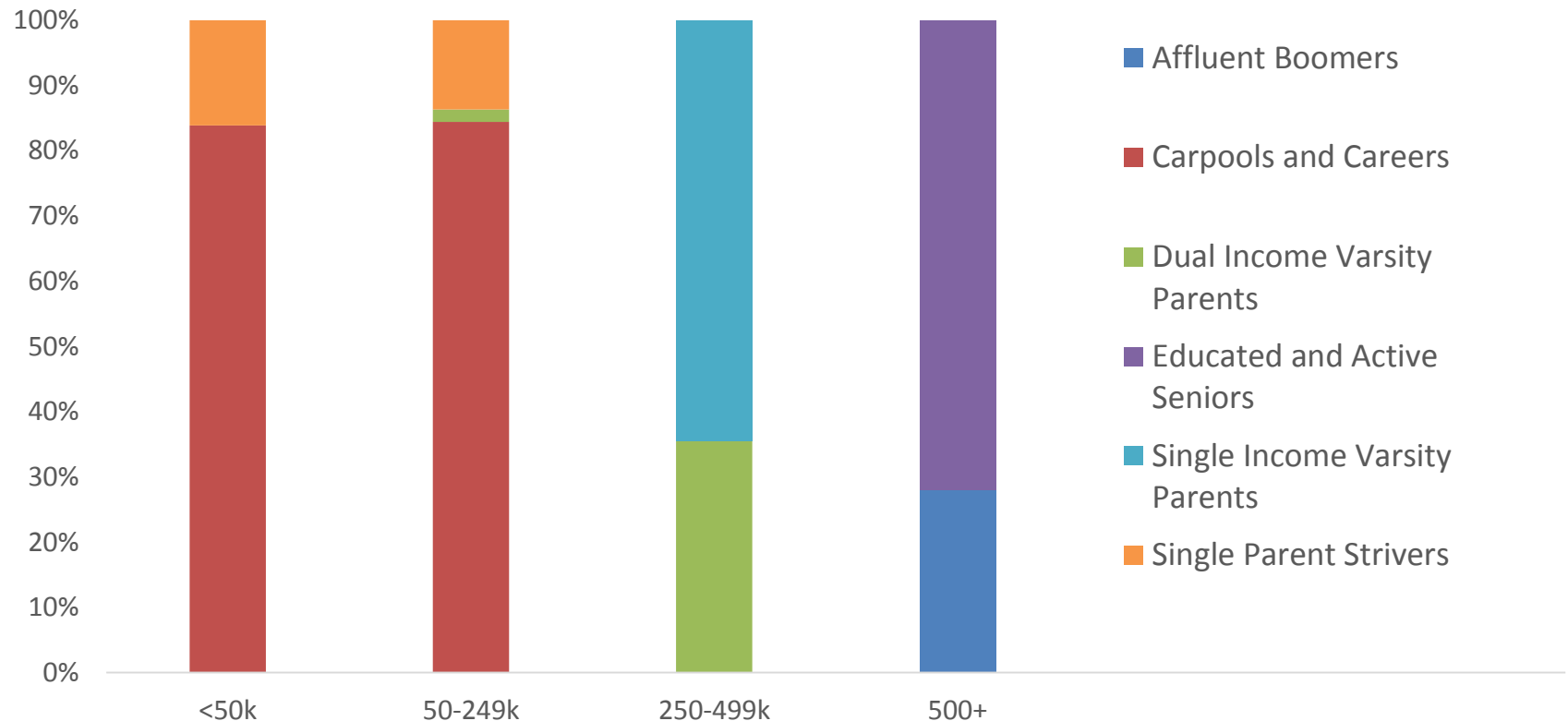
Base n = 248

Note: There were no Hispanics or American Indian / Alaska Native respondents within the survey

Gender



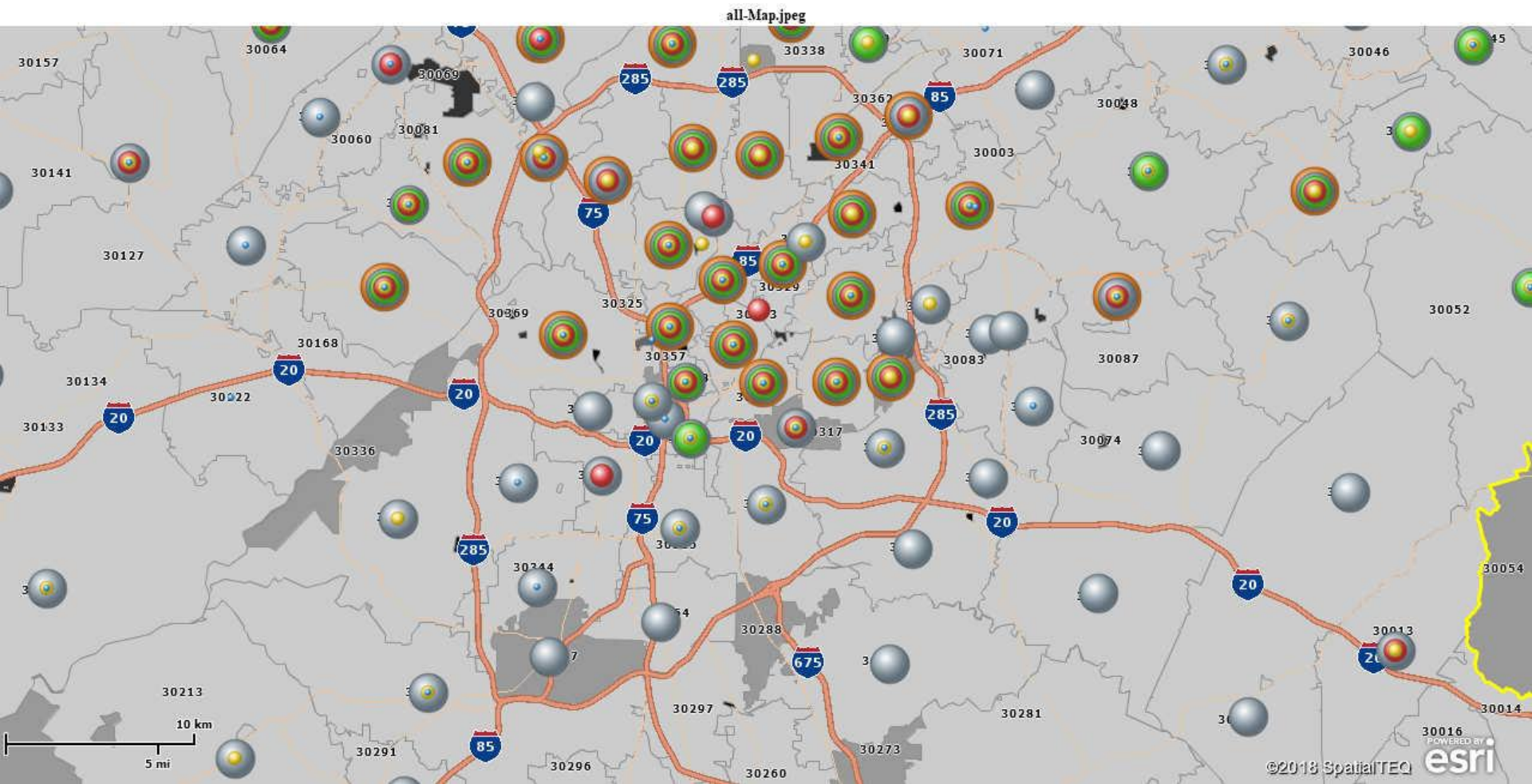
TRG Clusters Distributed Across Net Worth Bands



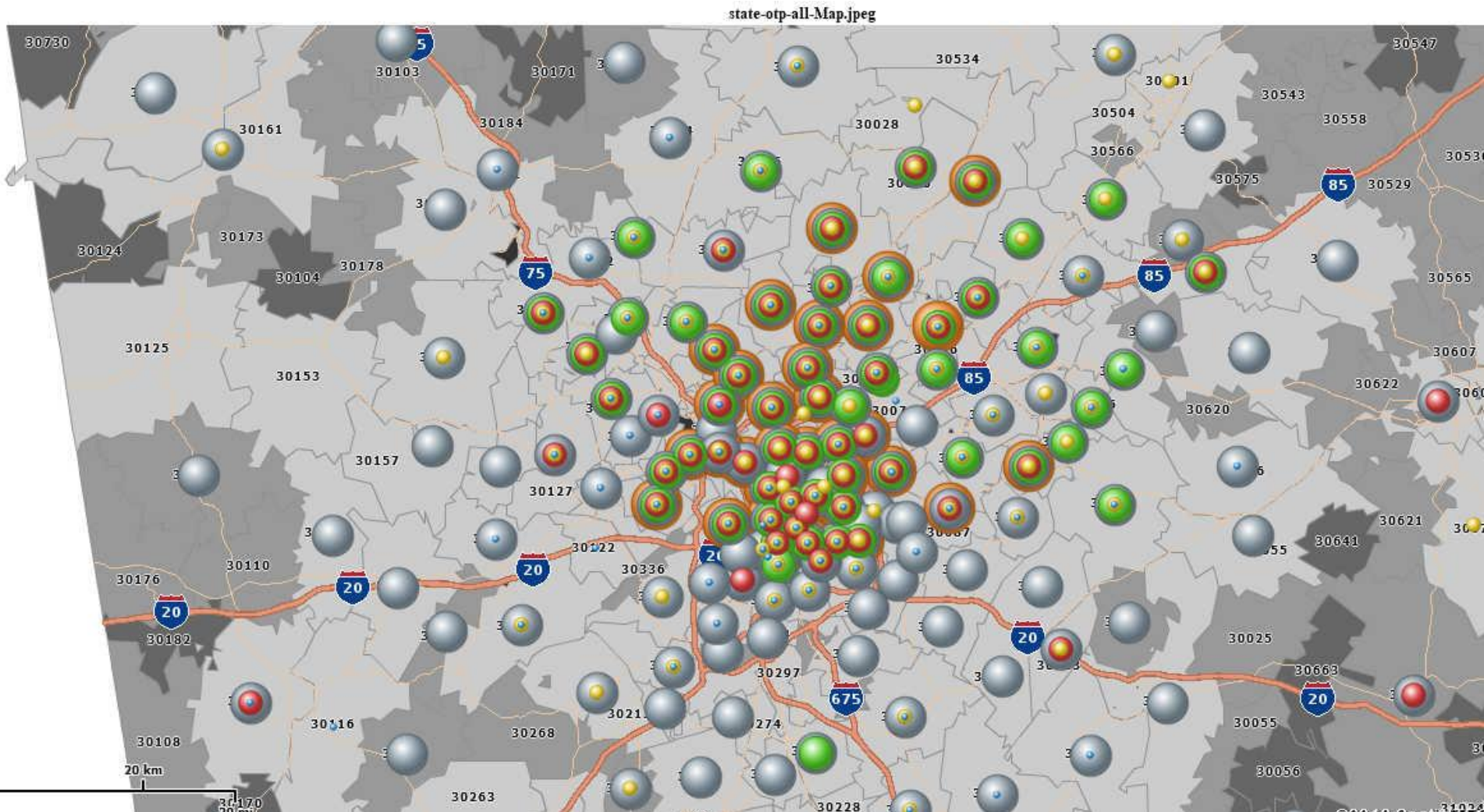
APPENDIX

Additional Zip Code Maps (Overall Atlanta Multi-Buyer)

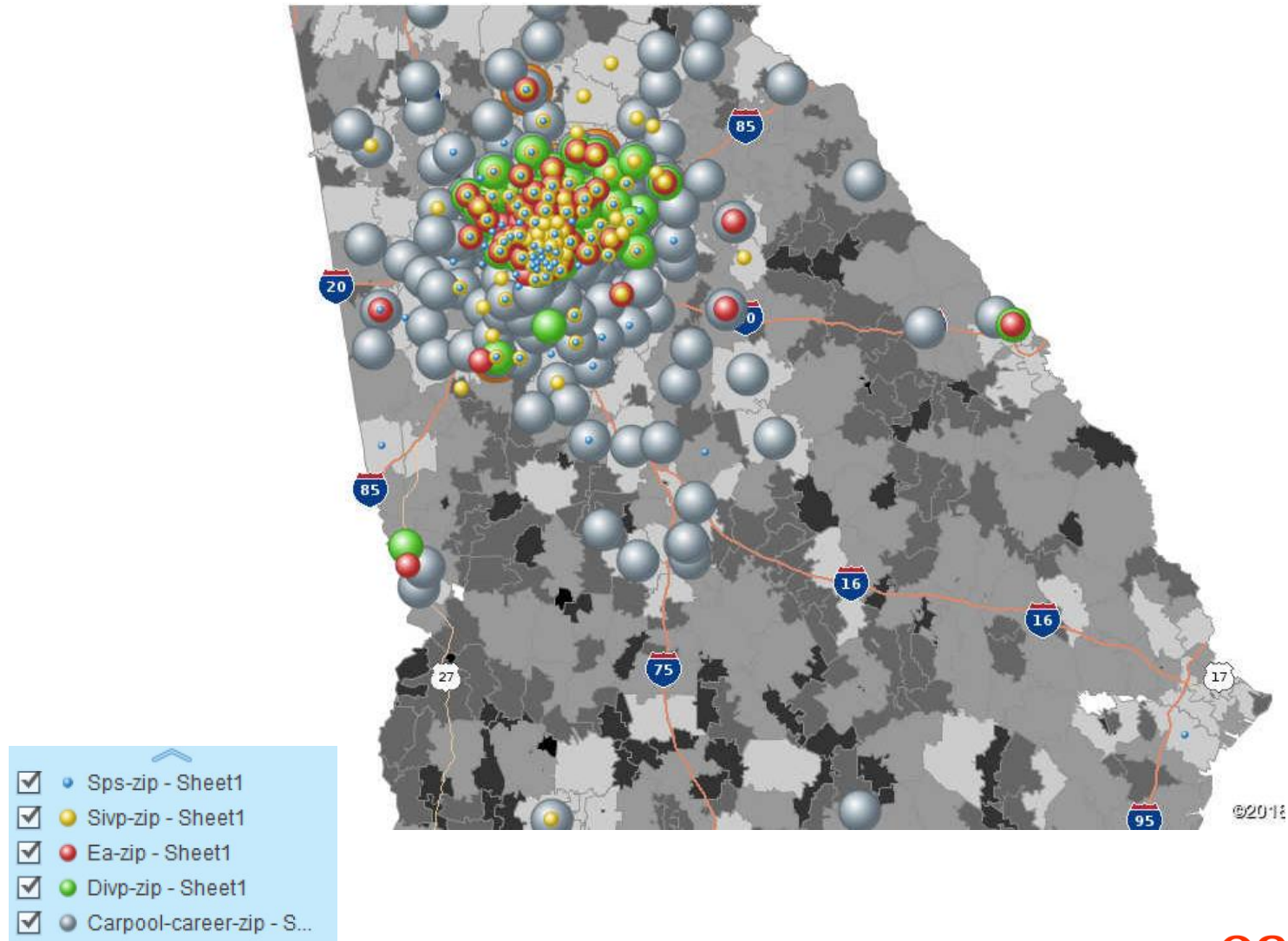
All Clusters Stacked by Zip Code - ITP



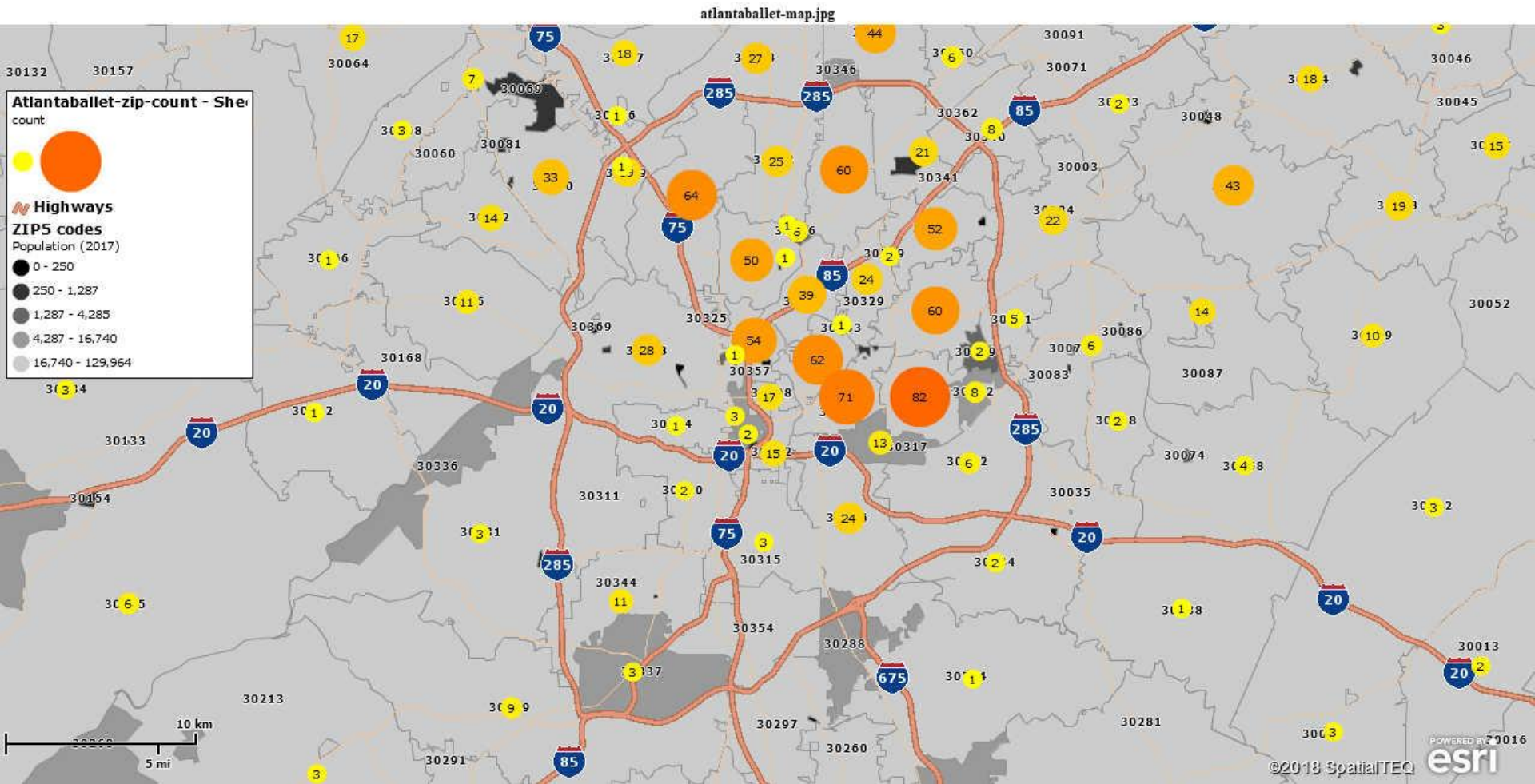
All Clusters Stacked by Zip Code – Outside of the Perimeter (OTP)



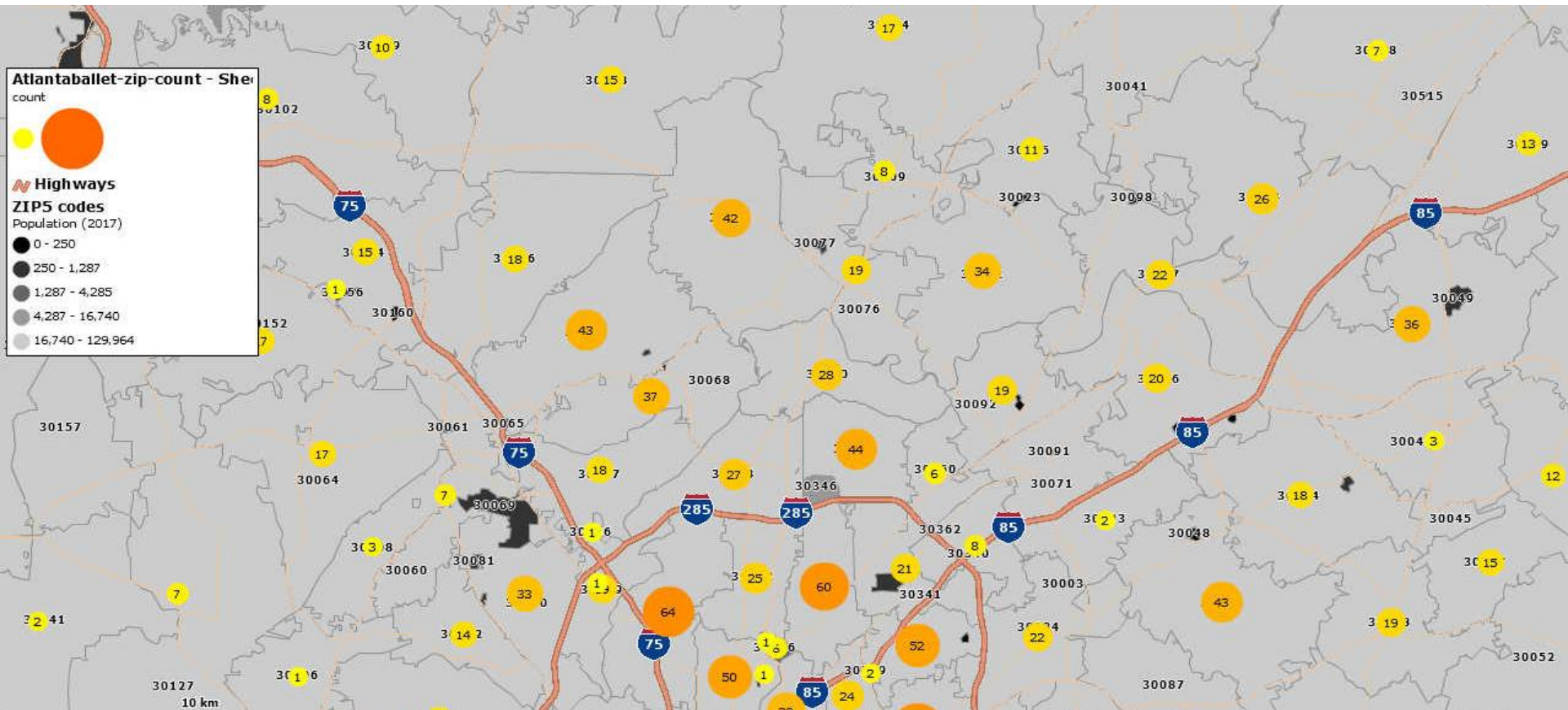
All Clusters Stacked by Zip Code – State of Georgia



Atlanta Ballet Inside the Perimeter (ITP)



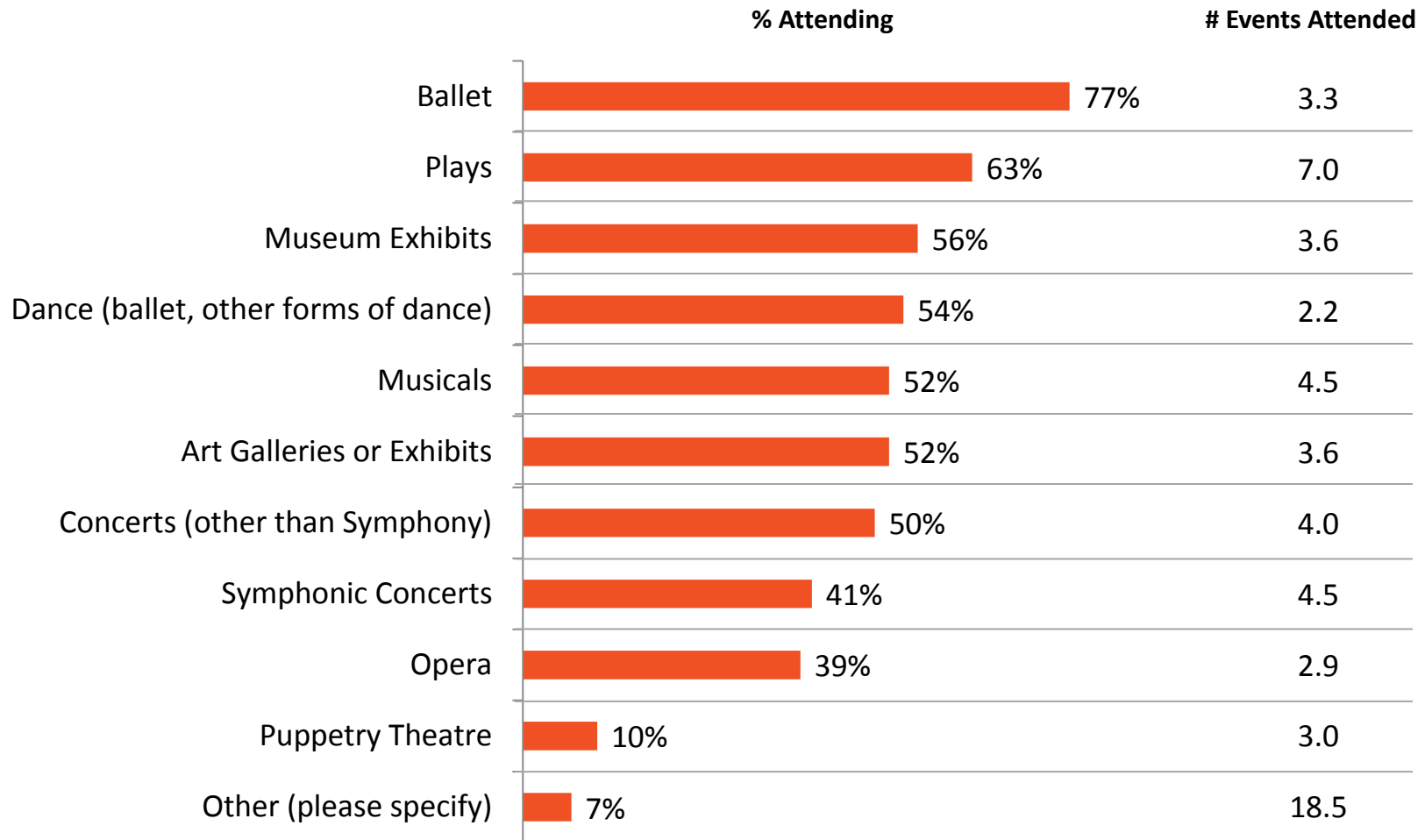
Atlanta Ballet Outside of the Perimeter (OTP)



APPENDIX

Overall Survey Data (if needed)

Art / Cultural Events Attended (Past 12 Months)



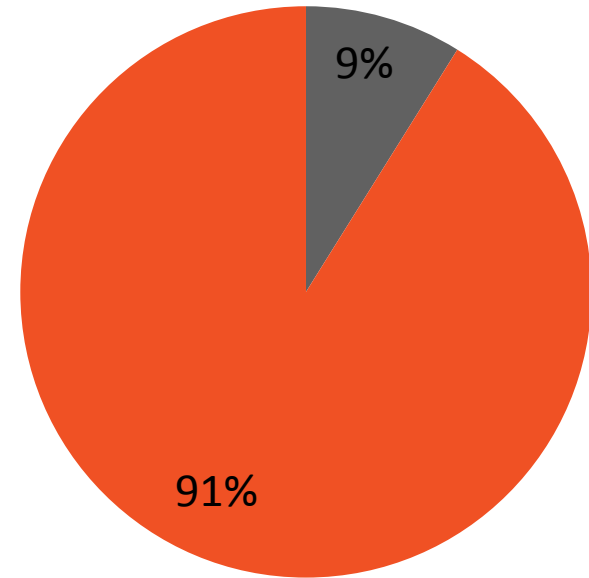
Q1. Which of the following art or cultural events have you attended in the past 12 months? Base n = 248

Q2. For each of the following art or cultural events attended, please estimate how many events you attended in the last 12 months for each.

Base varies according to those attending each.

Nutcracker Attendance

Among those single ballet attendees, the vast majority attended something other than The Nutcracker.



- Yes, it was The Nutcracker
- No, it was something else

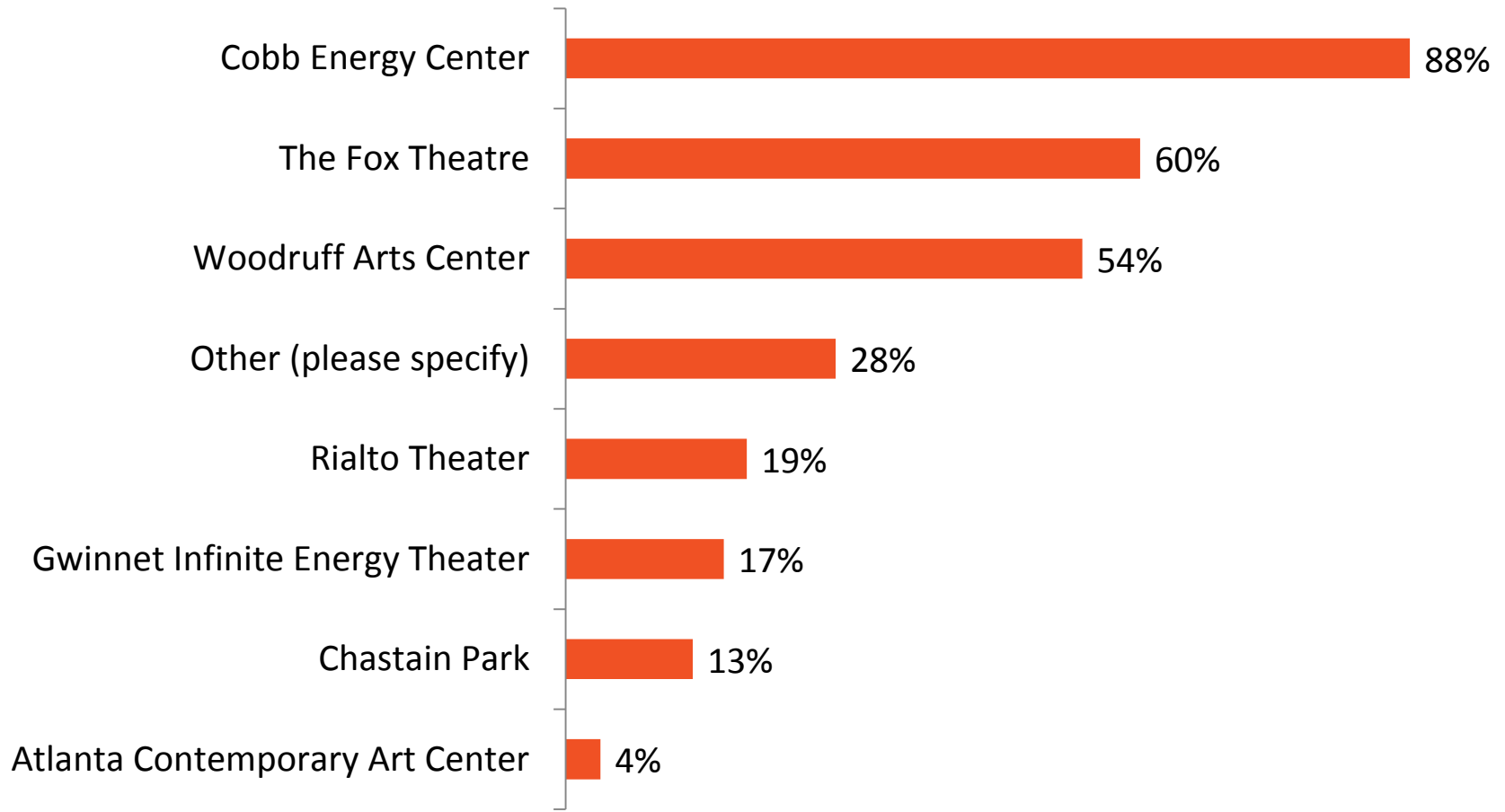
Attendance / Subscription

	% Attending	% Season Ticket Holder / Member / Subscriber
Atlanta Ballet	74%	36%
The Atlanta Opera	35%	16%
Alliance Theatre	34%	12%
Aurora Theatre	23%	6%
Emory Performing Arts Center	20%	2%
Horizon Theatre	21%	4%
Shakespeare Tavern	19%	3%
Atlanta Symphony Orchestra	39%	14%
Other (please specify)	46%	18%

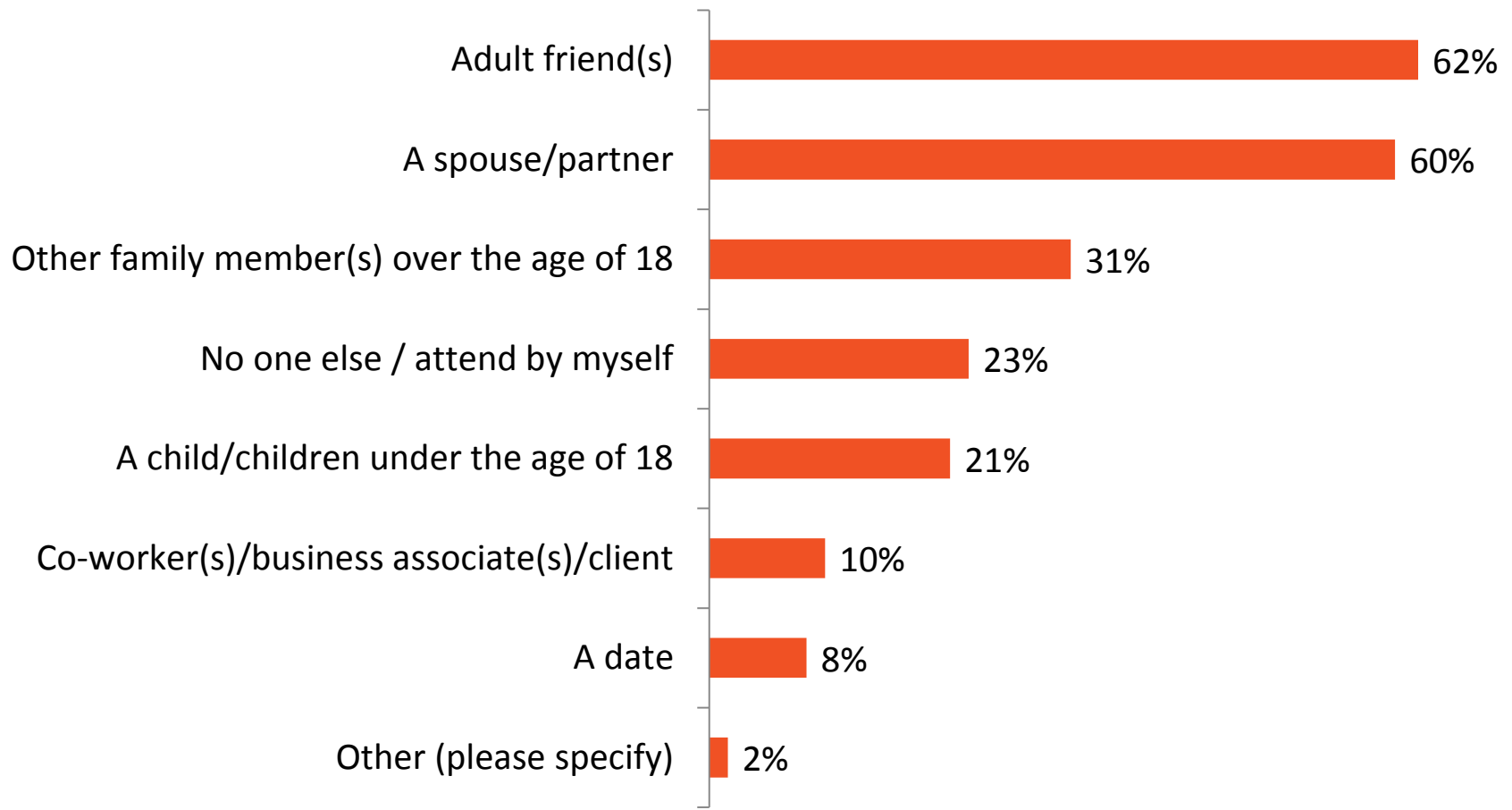
62%
Subscribers

38% Do not subscribe

Venues Attended (past 12 months)



Attending Events with Other Adults / Spouse



Entertainment

Most Popular forms of Entertainment:



93%
Dinner



77%
Visit with family / friends

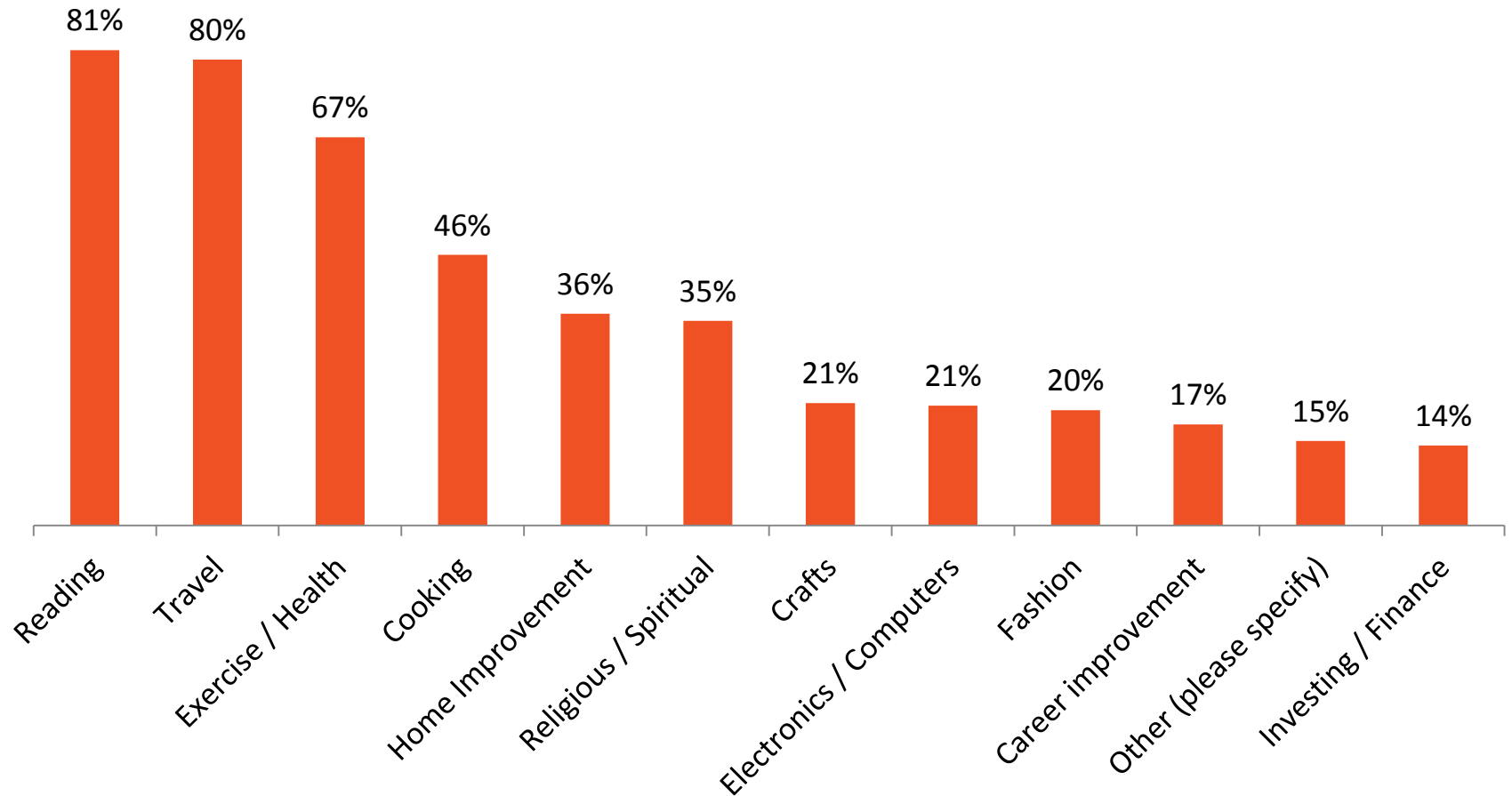


75%
Movie

Additional forms of Entertainment:

	%
Outdoor activity	42%
Watch sporting event	39%
Charity events	29%
Participate in sporting event	11%
Member of Club (i.e., Cherokee Club)	11%
Lounge / night club	10%
Other (please specify)	13%

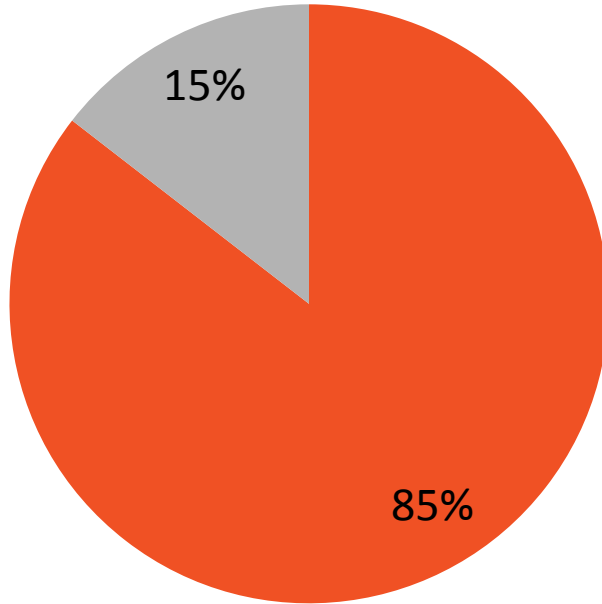
Other Interests



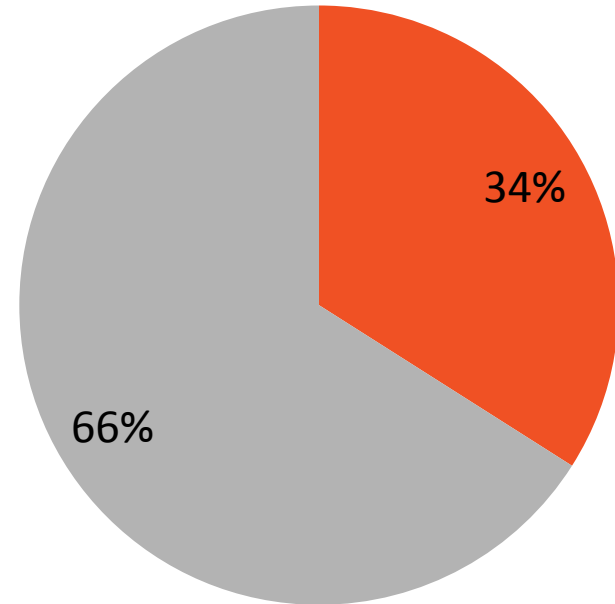
Q9. Please select from the list below other interest you may have or ways you like to spend your free time?

Base n = 248

Performance / Event Driven Decisions at Various Locations



- I choose based on a specific event or performance that I know will interest me
- I choose to attend no matter the event or performance because I tend to enjoy it no matter what



- I tend to lean toward one type of art or cultural event
- I tend to mix it up and try and attend a variety of art or cultural event types

Importance

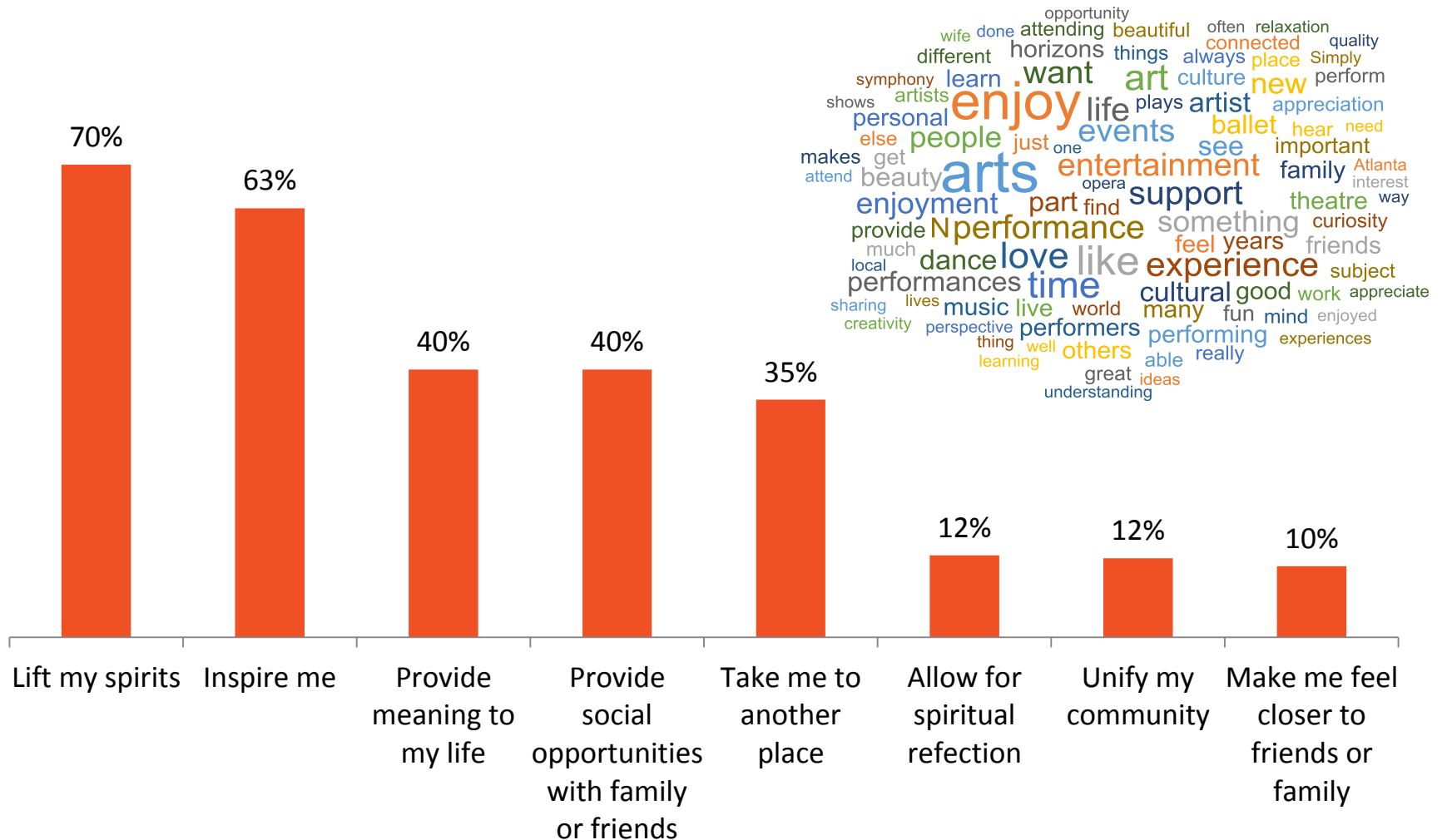
Row %	Extremely important	Very important	Somewhat important	Not very important	Not at all important
My personal interest in that style of art / cultural event	50%	39%	9%	1%	0%
Program content shown / presented	46%	41%	12%	2%	0%
Price for admission	16%	32%	36%	13%	4%
Specific performers in the program that I like to follow	13%	22%	39%	20%	6%
Distance from my home	10%	24%	46%	14%	5%



canvas 110
on what was previously listed,
MARKET RESEARCH

Q12a. How important are each of the following when making a decision regarding which events you may or may not attend? Q12b: Other than what was previously listed, what else is important to you regarding which events you may or may not attend? Base n = 248

Motivation for Art / Cultural Events



Q13a. Please select the top three reasons that most closely align with your motivation to attend art and cultural events.

Q14: Other than the reasons previously listed, what other motivation do you find personally that drives your decision to attend art and cultural events?

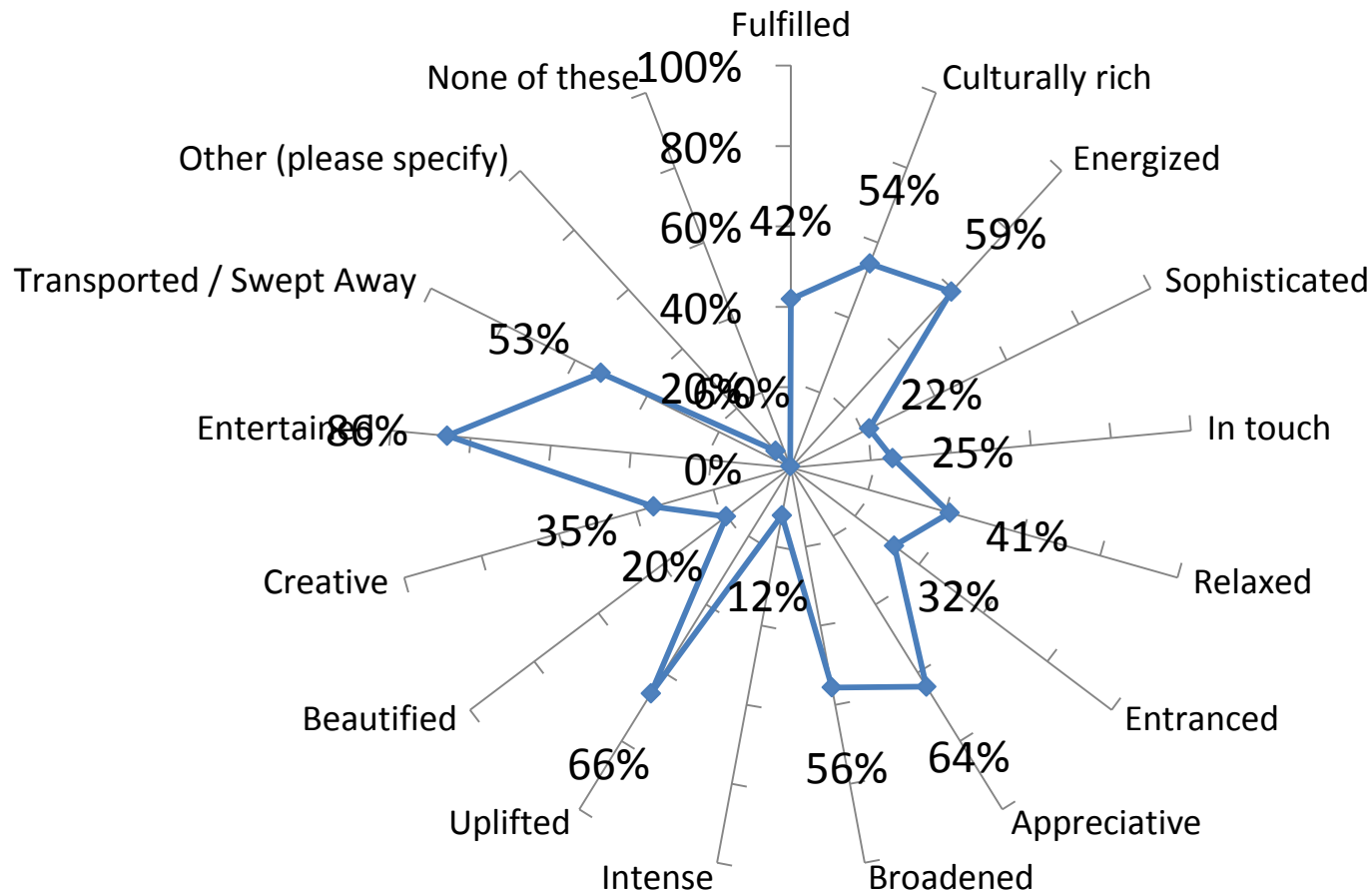
Base $n = 248$

Benefits Received

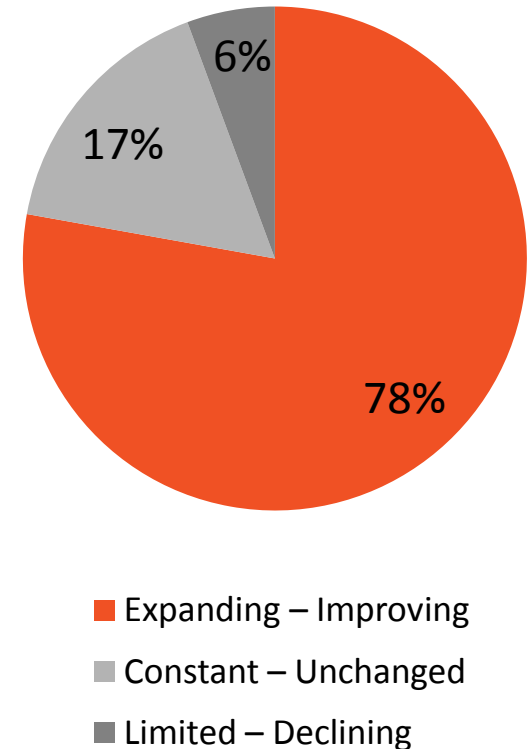
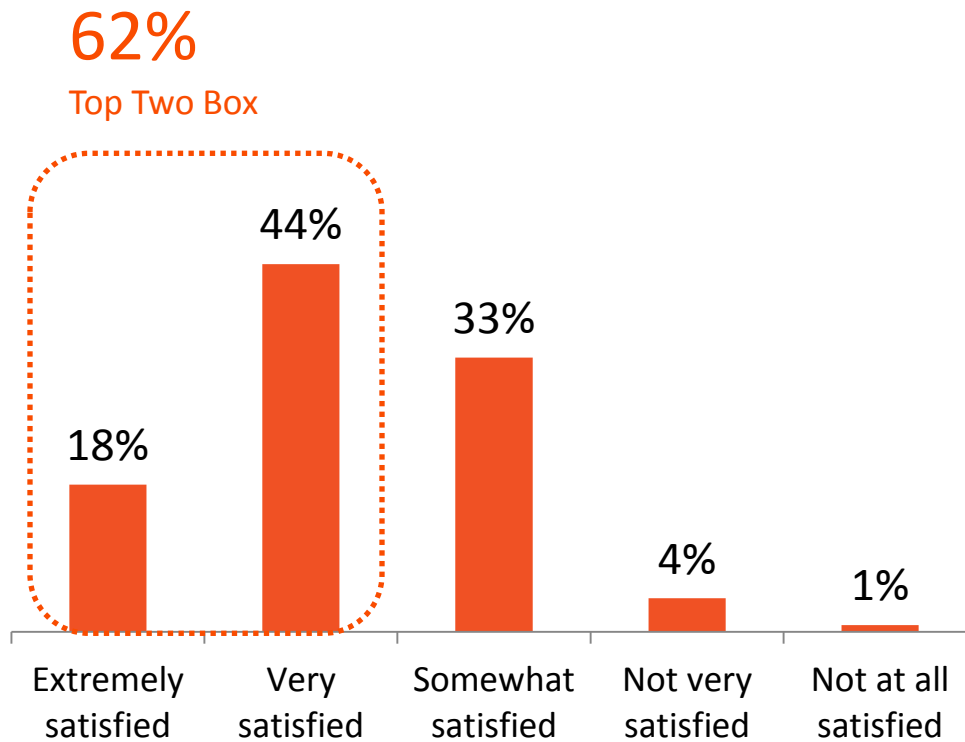
Ranked in Order of Importance

Row %	1st	2nd	3rd	4th	5th	6th
Aesthetics - The arts create beauty and preserve it as part of culture	40%	17%	12%	13%	9%	9%
Creativity - The arts encourage creativity, a critical skill	18%	30%	24%	15%	8%	4%
Expression - Artistic work lets us communicate our interests and visions	15%	23%	22%	17%	18%	6%
Preservation - Arts and culture keep our collective memories intact	10%	12%	13%	16%	24%	25%
Social Capital - We enjoy the arts together, across races and generations	9%	9%	14%	15%	19%	34%
Innovation - The arts are sources of new ideas, future concepts and connections	8%	9%	15%	24%	22%	22%

Feelings Evoked from Art / Cultural Event



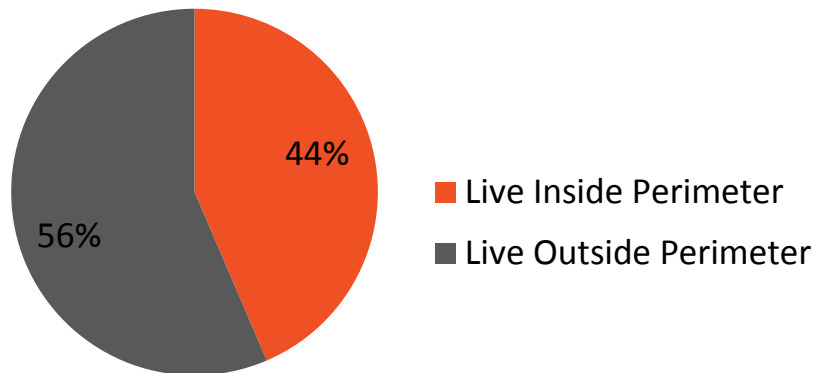
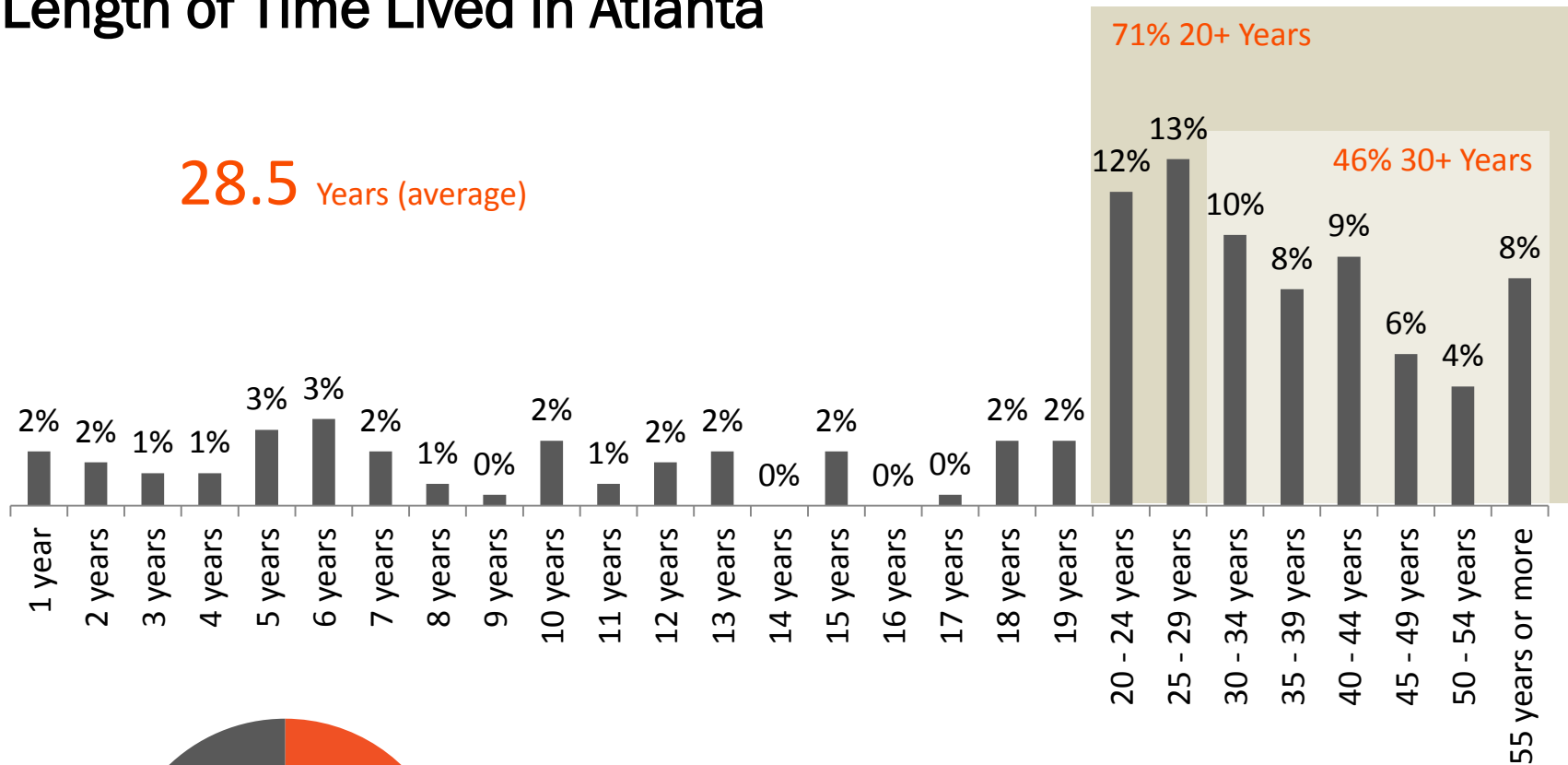
Satisfaction with an Expanding Cultural Landscape



- Expanding – Improving
- Constant – Unchanged
- Limited – Declining

Length of Time Lived in Atlanta

28.5 Years (average)

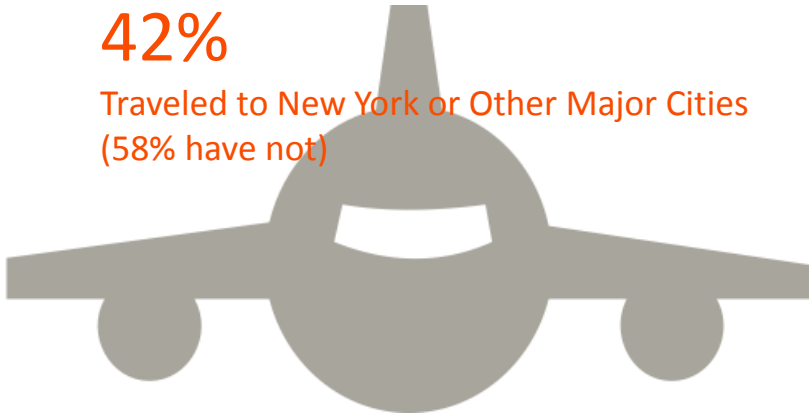


93%
Have Not Moved in Last Year

Travel for Arts / Cultural Events

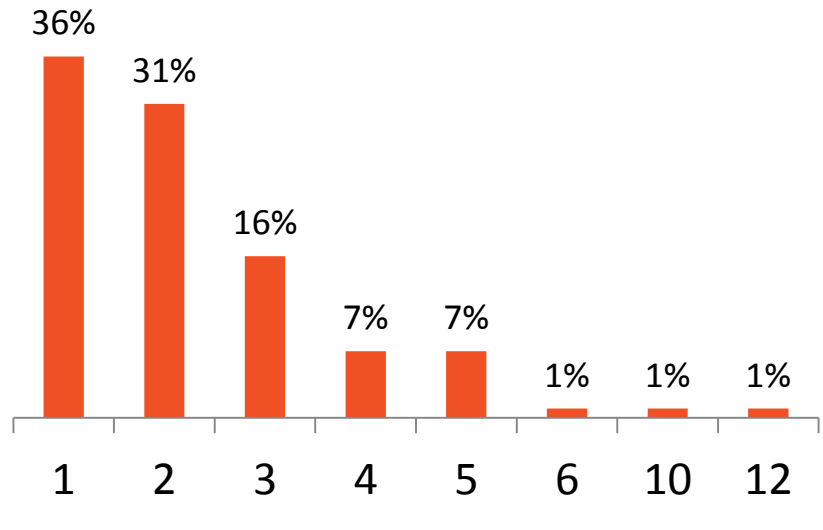
42%

Traveled to New York or Other Major Cities
(58% have not)



2.3

Average Number of Times
Traveled to Major Cities

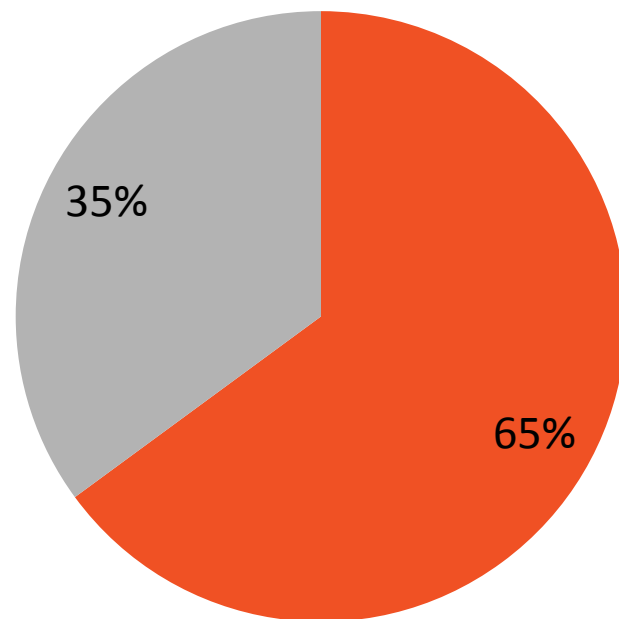


Number of Times Traveled to Major Cities

Q23: In the last year, how many times have you traveled to New York or other major cities to attend other arts or cultural events? If you have not traveled to New York for this purpose, please select zero.

Base n = 248

Attendance Frequency / Barriers



- I wish I could attend more often
- I am attending just the right amount

Barriers from Attending More Often

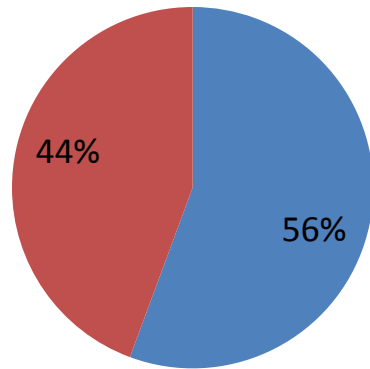


Q24: Thinking about the frequency that you attend art or cultural events, are you attending these kinds of events as much as you like?

Q25: You mentioned that you wish you could attend more often. What are the barriers that keep you from attending more? Please be as detailed as possible.

PERSONAL ATTITUDES

Time Pendulum



- Don't have enough time in a day to get everything done
- I manage my time well and don't feel hurried often

Column %	Carpools and Careers	Educated and Active Seniors	Single Income Varsity Parents	Dual Income Varsity Parents	Affluent Boomers	Single Parent Strivers
Don't have enough time in a day to get everything done	62%	52%	50%	63%	42%	69%
I manage my time well and don't feel hurried often	38%	48%	50%	37%	58%	31%

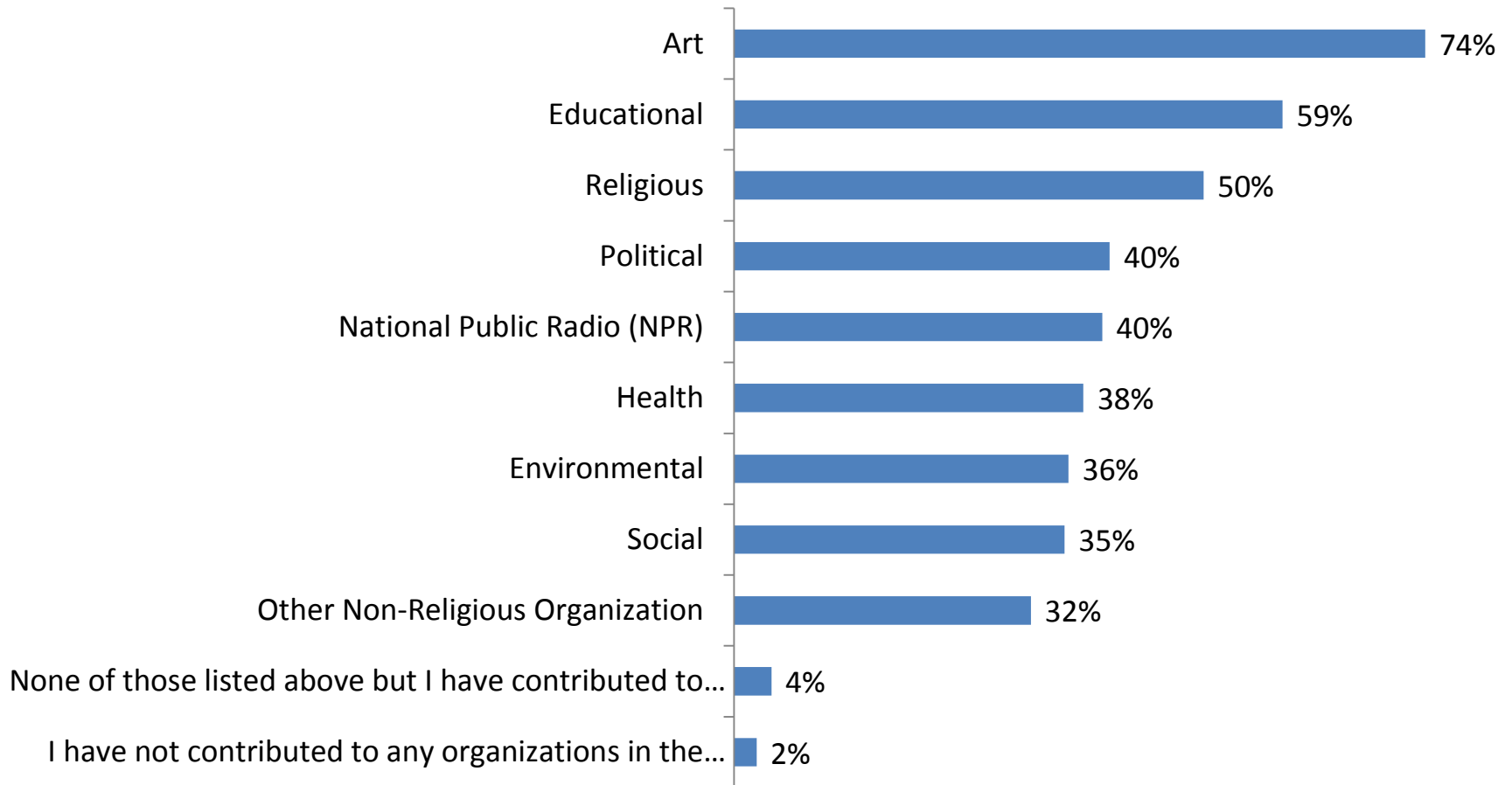
Personal Value Statements

Row %	Extremely important	Very important	Somewhat important	Not very important	Not at all important
Family: Protecting and supporting family	63%	25%	8%	2%	1%
Learning: Continuing to learn throughout my life	63%	28%	8%	0%	0%
Knowledge: Being well educated	60%	33%	7%	0%	0%
Authenticity: Being true to myself	57%	34%	7%	1%	0%
Open-mindedness: Being broad-minded	53%	38%	8%	0%	1%
Equality: Desiring equal opportunity for all	52%	25%	18%	4%	1%
Friendship: Having close, supportive friends	51%	35%	12%	1%	0%
Enjoying life: Doing things because I like them	50%	41%	8%	1%	0%
Curiosity: Wanting to explore and learn about new things	44%	41%	14%	1%	0%
Helpfulness: Making the effort to assist others	35%	46%	18%	2%	0%
Creativity: Being creative, imaginative	32%	41%	24%	3%	0%
Excitement: Having stimulating experiences	29%	39%	27%	4%	0%
Social responsibility: Working for the welfare of society	29%	37%	27%	7%	1%
Environmental: Helping to preserve nature	28%	39%	27%	6%	0%
Faith: Holding to religious faith and belief	27%	22%	19%	13%	19%
Thrift: Being economical or careful with money and avoiding excesses	21%	39%	31%	8%	1%
Tradition: Preserving time-honored customs	21%	29%	34%	13%	3%
Ambition: Aspiring to get ahead	9%	21%	35%	28%	7%
Looking good: Seeking the utmost attractive appearance	8%	22%	43%	23%	4%
Wealth: Having material possessions, a lot of money	4%	12%	52%	28%	3%

Q29. Of the statements of personal values listed below, please select the most appropriate level that best describes how important, if at all, it is to you as a guiding principle in your life.

Base n = 248

Organizations Contributed



Social Media Used Regularly

	%
Facebook	60%
Instagram	26%
Twitter	14%
Pinterest	14%
Snapchat	5%
Other (please specify)	6%
I don't participate in any social media	30%



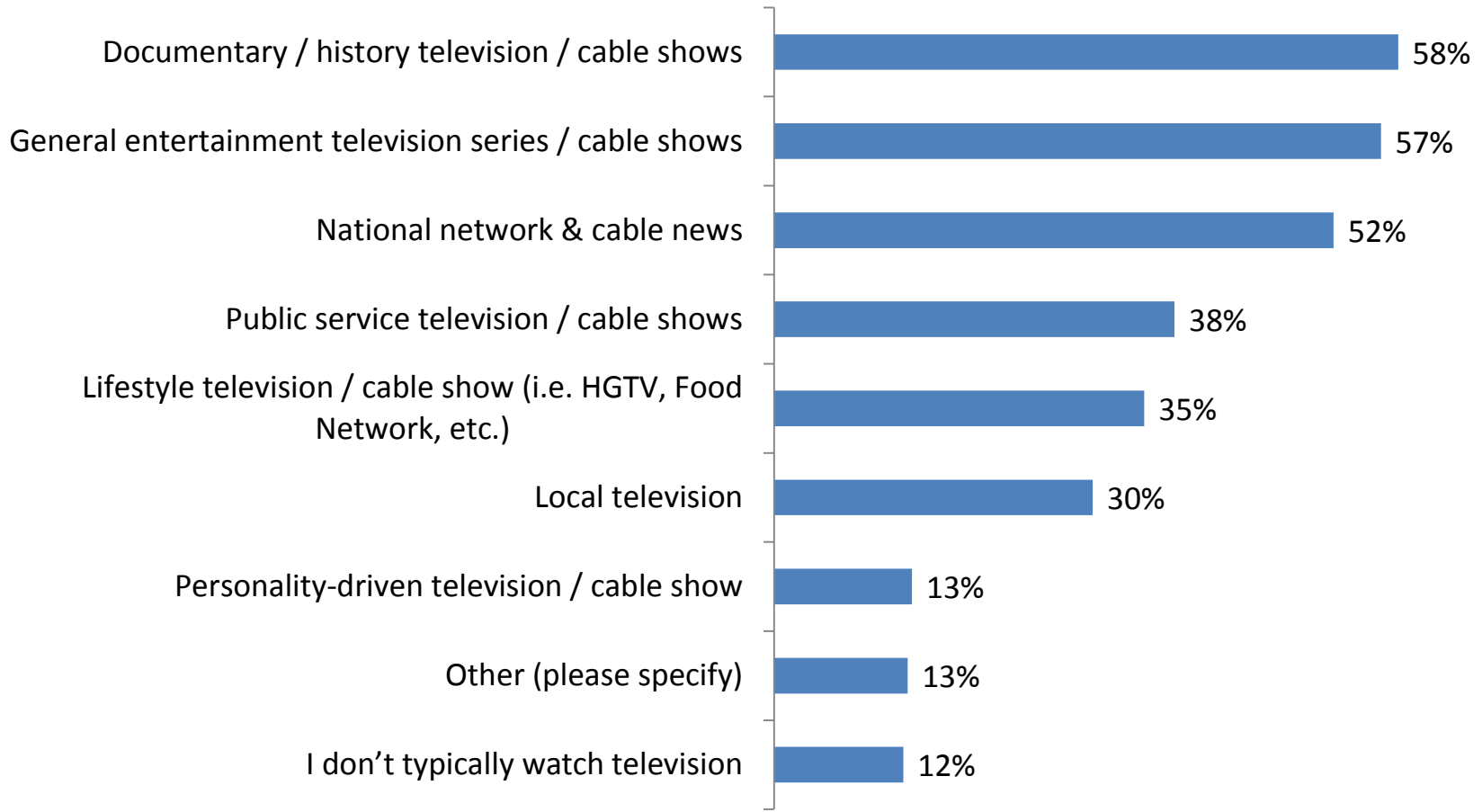
Facebook is used most regularly and this same pattern is observed across clusters.

Column %	Carpools and Careers	Educated and Active Seniors	Single Income Varsity Parents	Dual Income Varsity Parents	Affluent Boomers	Single Parent Strivers
Facebook	66%	58%	58%	61%	58%	63%
Instagram	28%	18%	20%	32%	23%	56%
Twitter	19%	5%	20%	15%	10%	25%
Pinterest	14%	8%	13%	22%	23%	6%
Snapchat	5%	2%	5%	10%	3%	6%
Other (please specify)	2%	5%	10%	10%	3%	13%
I don't participate in any social media	24%	37%	33%	32%	26%	19%

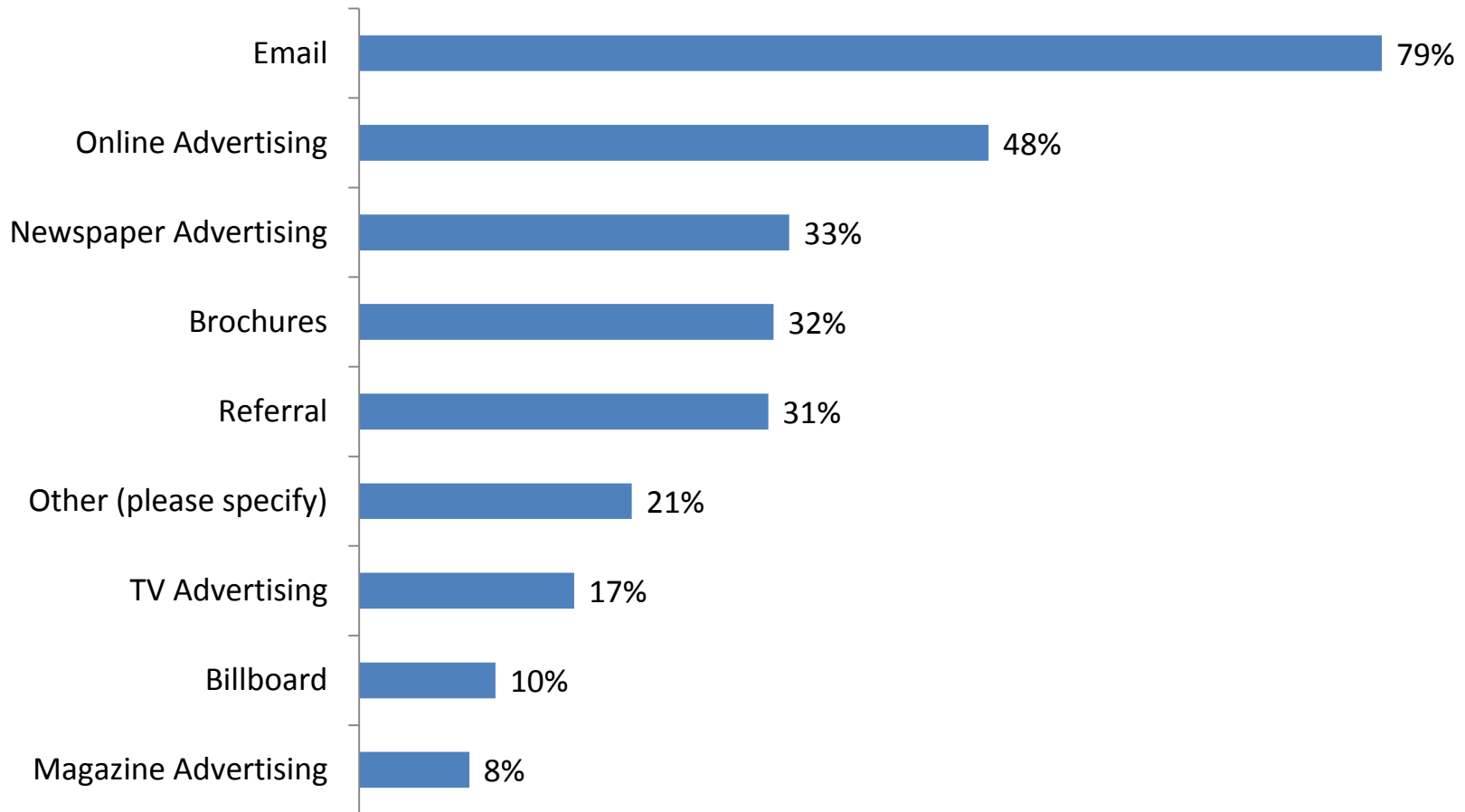
Q31. Which of the following social media sites do you regularly use?

Base n = 248

Television Watched



Informed About Performing Art Events in Atlanta



Q33. How do you typically find out about performing arts events in Atlanta?

Base n = 248

Keeping Informed of Performing Arts in Atlanta

Column %	Carpools and Careers	Educated and Active Seniors	Single Income Varsity Parents	Dual Income Varsity Parents	Affluent Boomers	Single Parent Strivers*	Total Survey Sample
Email	81%	81%	83%	68%	81%	75%	79%
Online Ad	53%	48%	40%	51%	42%	56%	48%
Newspaper Ad	26%	52%	35%	17%	39%	13%	33%
Brochures	31%	34%	23%	37%	35%	31%	32%
Referral	26%	37%	23%	22%	42%	56%	31%
Other	36%	15%	20%	24%	13%	0%	21%
TV Ad	14%	18%	13%	12%	26%	25%	17%
Billboard	12%	6%	13%	15%	3%	19%	10%
Magazine Ad	7%	11%	8%	5%	10%	13%	8%

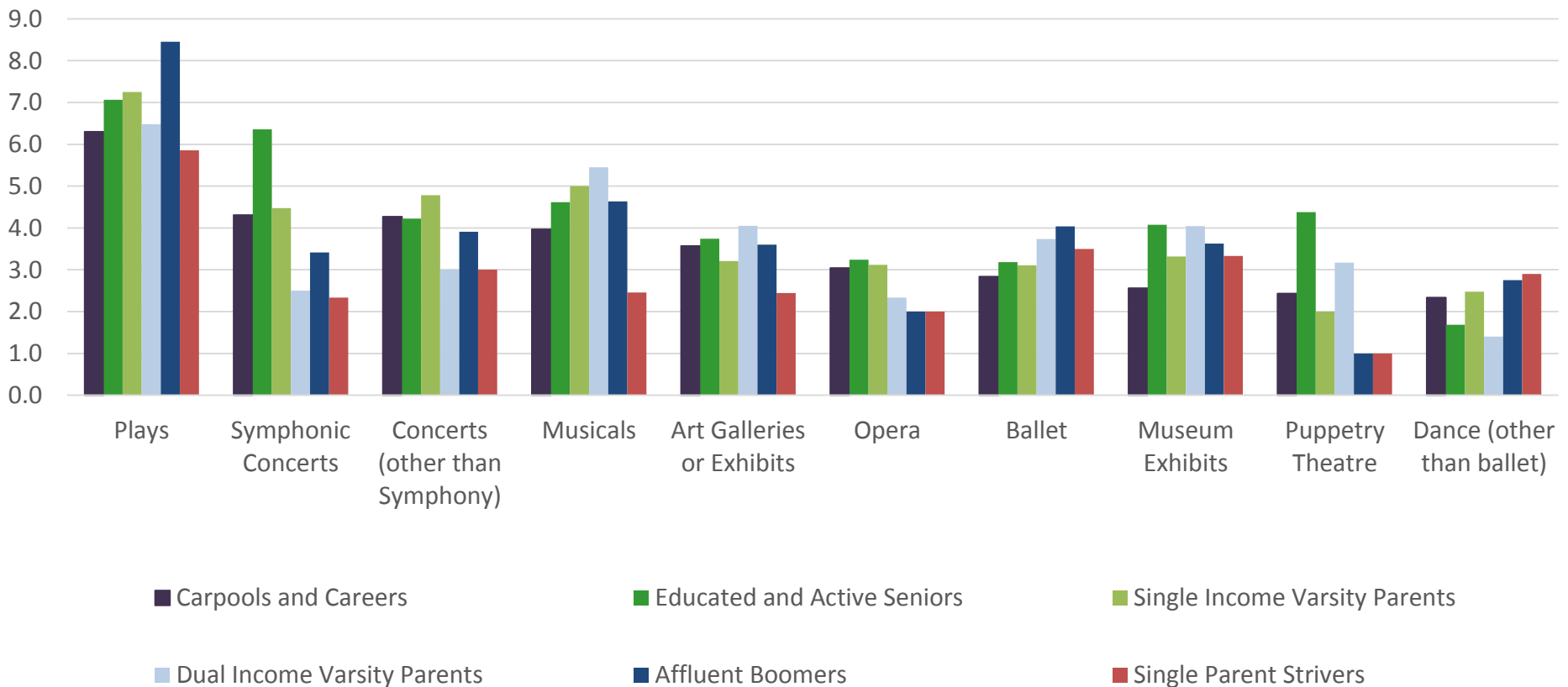
- Carpools and Careers are also learning about events from other sources such as friends, word of mouth, personal research
- Educated and Active Seniors read the news paper more often
- Dual Income Varsity Parents also rely on brochures more so than the total sample
- Affluent Boomers seem to be relying upon email just as the other groups do but they are also using a variety of other sources more often

Q33. How do you typically find out about performing arts events in Atlanta?

*Caution should be used when interpreting results as sample size is extremely small

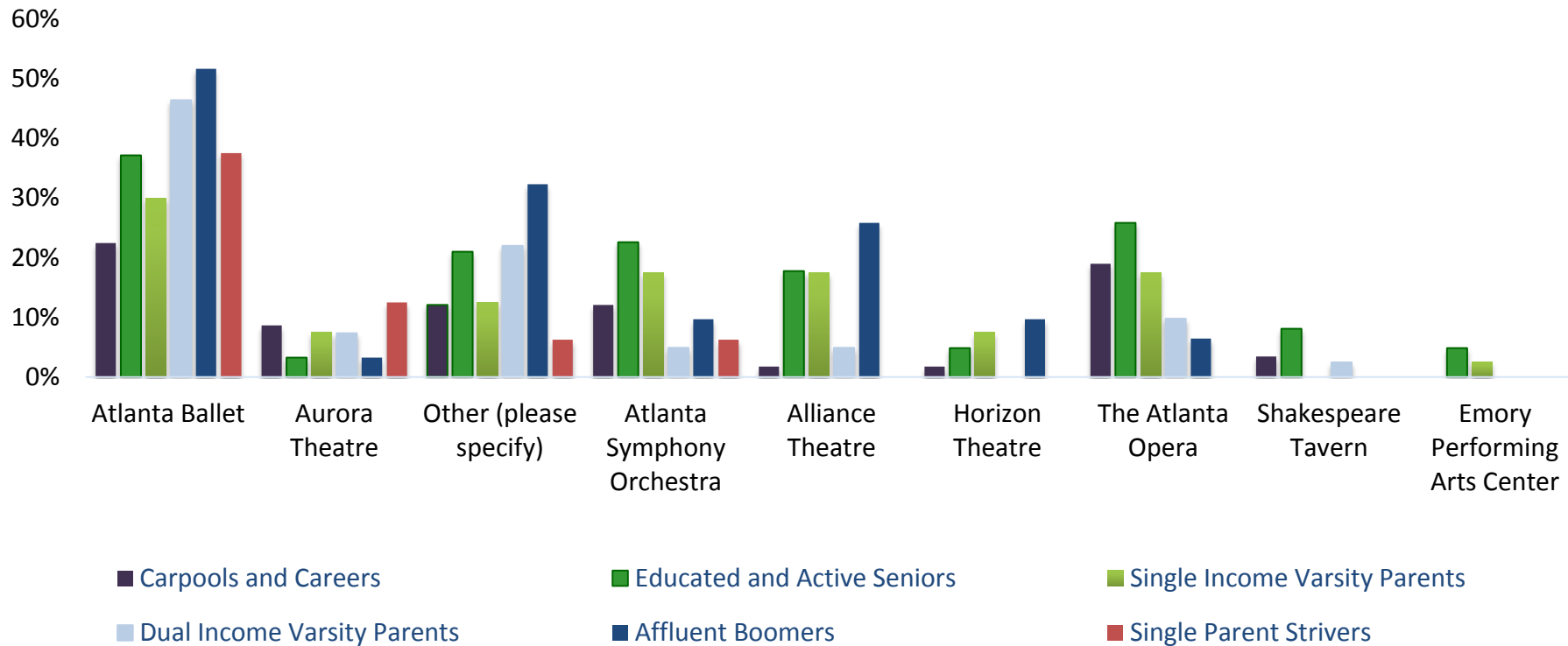
Performance Summary

Arts or Cultural Events Attended in Past 12 Months:



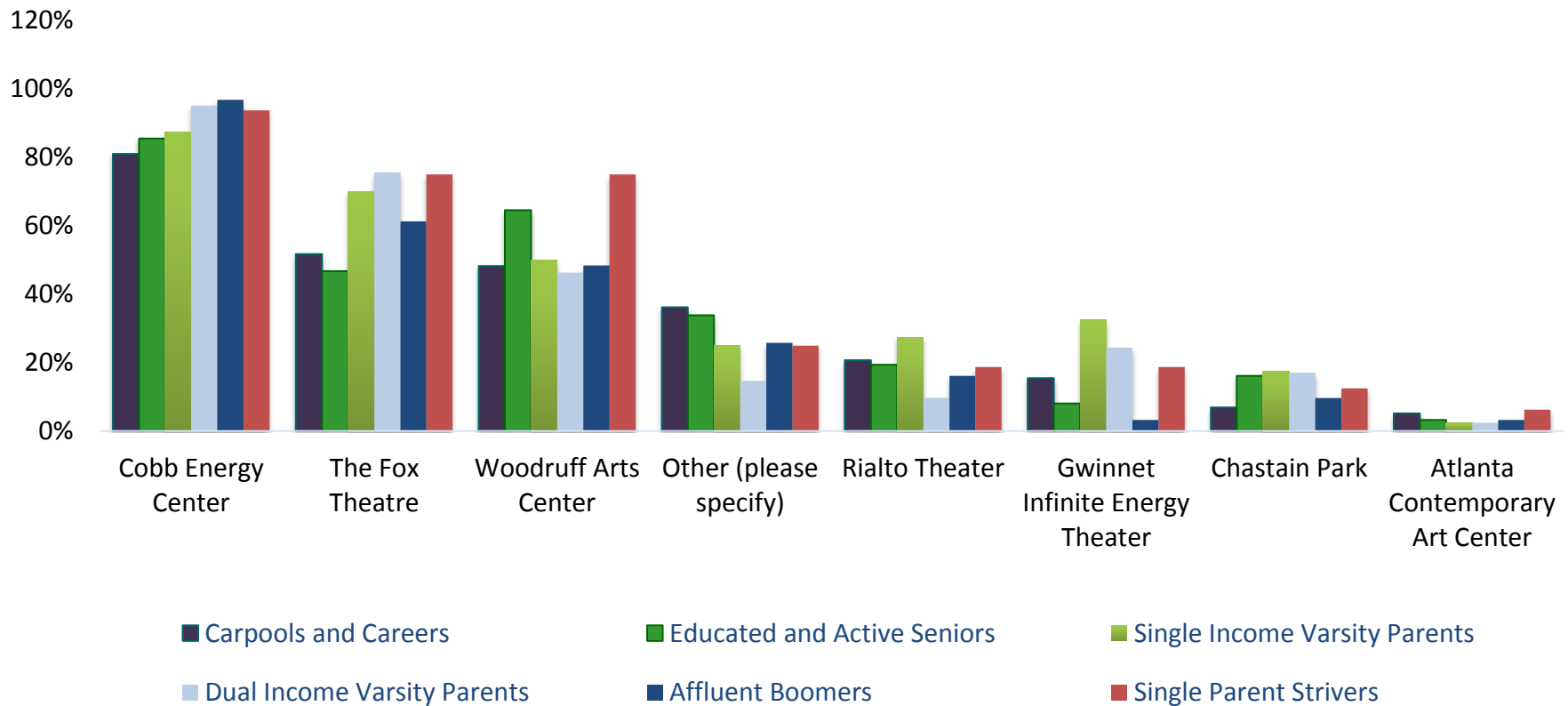
Member Summary

Season Ticket Holder, Member or Subscriber Most Recent Season



Venue Summary

Venues Attended in Last 12 Months



Preparing for Quantitative Survey

- As the interviews unfold, some deviations from the cluster assignments are emerging.

Interviewee A.C. : A young adult female living on the west-side of Atlanta was a newly married graduate of Auburn and fully immersed in theater, along with occasional ballet.

Age 24 - 25	Children Present	Completed High School	Female	Home Owner	Working Woman	Inferred Married	Greater than \$499,999	Educated and Active Seniors	131.7128
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Interviewee K.J. : A recently retired female living in Decatur was married with no kids. She and her semi-retired husband enjoyed many performing arts but were cutting back a bit to focus resources on travel now that they had less work commitments.

Age 68 - 69	No Children Present	Completed College	Female	Home Owner	Working Woman	Married	\$250,000 - \$499,999	Single Income Varsity Parents	162.3997
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- Therefore, through the remainder of the research process, including the quantitative process, the respondents will be reclassified into the more appropriate demographic cluster.

Preparing for Quantitative Survey (continued)

- Scanning through the data has identified some additional items:

Age > 99	Children Present		Male	Home Owner		Single	Greater than \$499,999	Educated and Active Seniors	157.8022
Age > 99	No Children Present	Completed High School	Male	Home Owner	Working Woman	Inferred Married	Greater than \$499,999	Educated and Active Seniors	111.1427
Age > 99	No Children Present	Completed College	Male	Home Owner	Working Woman	Married	\$100,000 - \$249,999	Carpools and Careers	130.0051
Age > 99				Home Owner		Married	\$50,000 - \$99,999	Carpools and Careers	146.1379
Age > 99	No Children Present	Completed College	Male	Home Owner	Working Woman	Married	Greater than \$499,999	Affluent Boomers	138.402

13 individuals in the data set are over 92 years old. Of that group:

5 Carpools and Careers

3 Single Income Varsity Parents

2 Affluent Boomers

3 Educated and Active Seniors

1 Single Parent Striver



Intend to not distribute survey to records such as these.

Preparing for Quantitative Survey (continued)

- Zip codes to match the additional (second) email file sent needed
-

- Survey invitation launch suggestion

~3,300

Estimated number of
Records for Survey Invitation

-----> Suggest Atlanta Ballet send survey link to the list

- Optimizes response rate among the finite list
- Minimizes field time as a result

Survey Launch Tasks & Roles (see Timeline on Slide 3 in Update)

- Canvas to draft survey and gain approval from Atlanta Ballet
- Canvas to program survey
- Canvas to draft email invitation for Atlanta Ballet (with client input)
- Canvas to provide unique links for respondents
- Atlanta Ballet to send invites
- Canvas continues to monitor incoming responses



Qualitative In-Depth Interviews

As of 2/7/18

10

45 – 60 Minute

In-depth Interviews

- Ten interviews completed so far, three more on the schedule for today.
- Initial conversations are identifying themes:

**Making time in a busy
schedule for the arts**

**Value and appreciation for the
talent/skills/technique of the performers**

**The arts provide a reprieve from
the drudgery of everyday life**

**Involve kids in attending
performances to expand their
horizons/exposure**

**The arts are a venue to help me continue
learning and having new experiences**