

Audience Building Roundtable

The Arthur M. Blank Family Foundation
IMPACTS Research & Development

2 May 2019

A note from IMPACTS

Thank you for inviting us to share data with the Audience Building Roundtable! We at IMPACTS hope that you will take time to consider the findings, discuss them, and use them as tools to help drive your organization forward in achieving your mission.

Please remember that all information in this deck is the property of IMPACTS. As per our agreements with generous partners who have helped fund the research and allow us to share the information, this deck and/or any parts of it may not be sold or used for commercial purposes. Similarly, this deck and/or any parts of it may not be made available on behalf of an organization outside of IMPACTS (i.e. on an unauthorized organization's website) or re-presented by another entity outside of IMPACTS (i.e. at a conference or similar gathering), without permission granted by the company and its partners. Much of the data in this presentation has been shared in writing on portions of the website *Know Your Own Bone* (www.colleendilen.com). Please see the website for more information.

If you are interested in a deeper dive on these topics or others, or having the data re-presented, please contact Bethany Gotschall at bcgotschall@impactsresearch.com. We would be happy to work with you.

Hello!

We're with IMPACTS Research & Development



Colleen Dilenschneider

Chief Market Engagement Officer

Author/Publisher of *Know Your Own Bone*

Superpower: Translating trend data



Jim Hekkers

Chief Strategy Officer

Former Managing Director at Monterey Bay Aquarium

Superpower: Putting trend data into play

We don't get to decide how best to communicate or program to reach people - our guests do.

Traditional decision making



Data-informed decision making



Where is this data coming from?

- **IMPACTS client data & ongoing monitoring**
 - When permission is granted
- **National Awareness, Attitudes & Usage Study**
 - Ongoing, 124,000+ individuals
 - Lexical analysis
 - Representative
 - Perceptions regarding visitor-serving leisure activities
 - Museums, performing arts, botanic gardens, historic sites, etc.
 - Believed the largest VSO-related survey in US
 - Originally funded in partnership between IMPACTS and The David & Lucile Packard Foundation

Data organized by:

- **US Composite:** US respondents over age 18 ($n=124,113$)
- **Designated Market Area (DMA):** Atlanta, GA MSA + Columbus, GA ($n=4,168$)
- **DMA HPVs:** (High-propensity visitors) Possess the demographic, psychographic and behavioral attributes that indicate heightened likelihood of visiting a cultural organization ($n=1,368$)

Agenda

Outline of the day

8:35a Introduction

8:50a AUDIENCES & ATTENDANCE BEHAVIORS

9:45a Discussion

10:05a BARRIERS & OPPORTUNITIES

[BREAK]

11:35p Discussion

12:00p LUNCH

12:45p REPUTATION

1:30p Discussion

[BREAK]

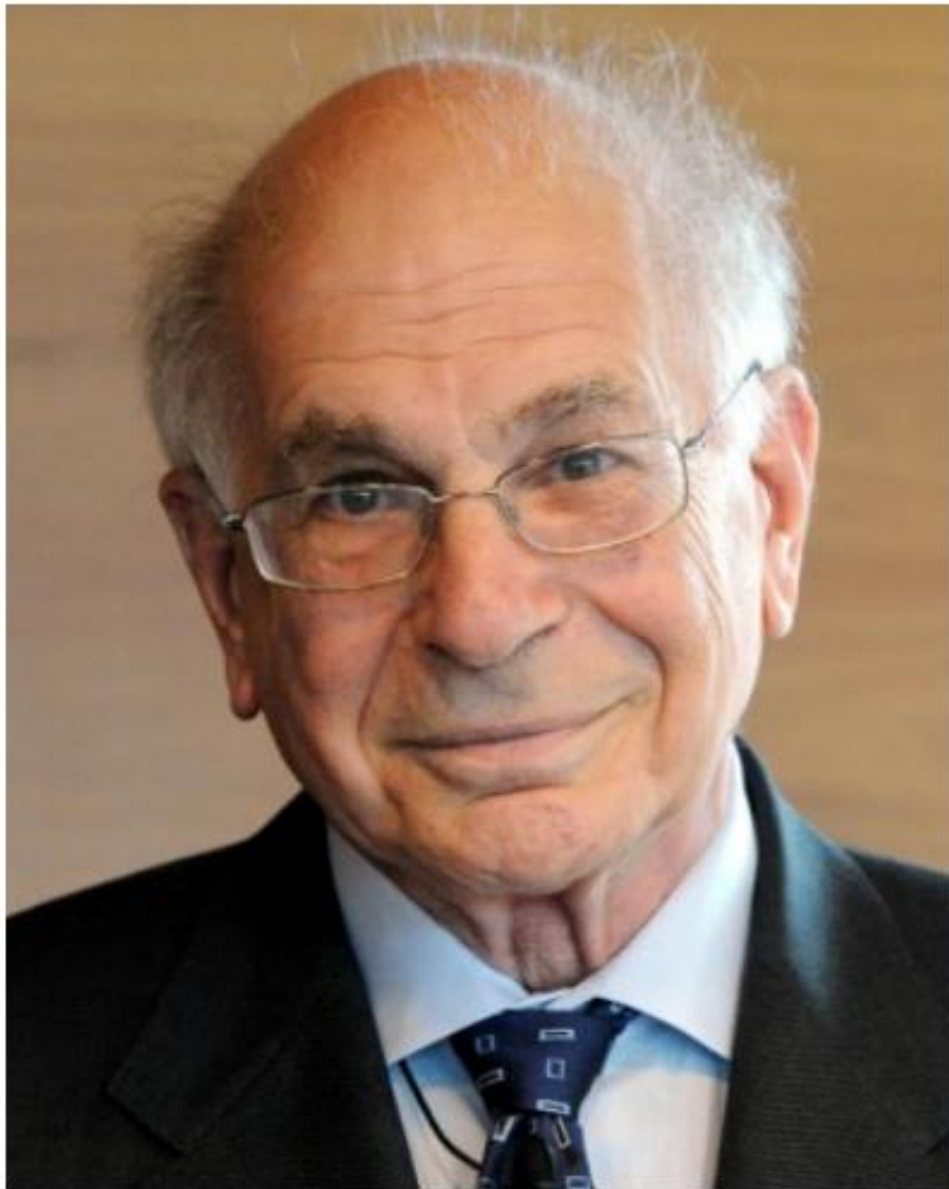
2:00p SATISFACTION

2:45p Discussion

3:05p Wrap up

3:30p End

Introduction



THINKING,
FAST AND SLOW



DANIEL
KAHNEMAN

WINNER OF THE NOBEL PRIZE IN ECONOMICS

[Curiosity Changed the Cultural Organization: Three Non-Museum Books to Inspire Your Thinking](#)

System 1



Fast



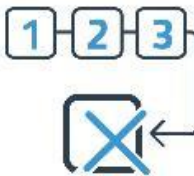
Unconscious



Automatic



Everyday
Decisions



Error prone

System 2



Slow



Conscious



Effortful

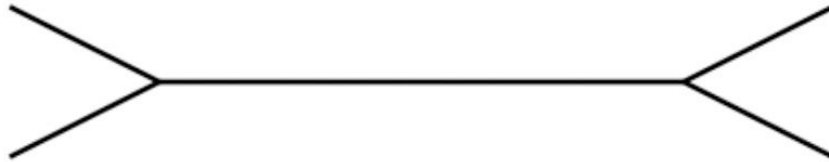
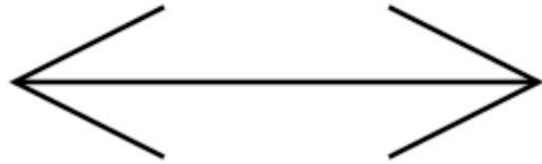


Complex
Decisions



Reliable

Blind spot bias

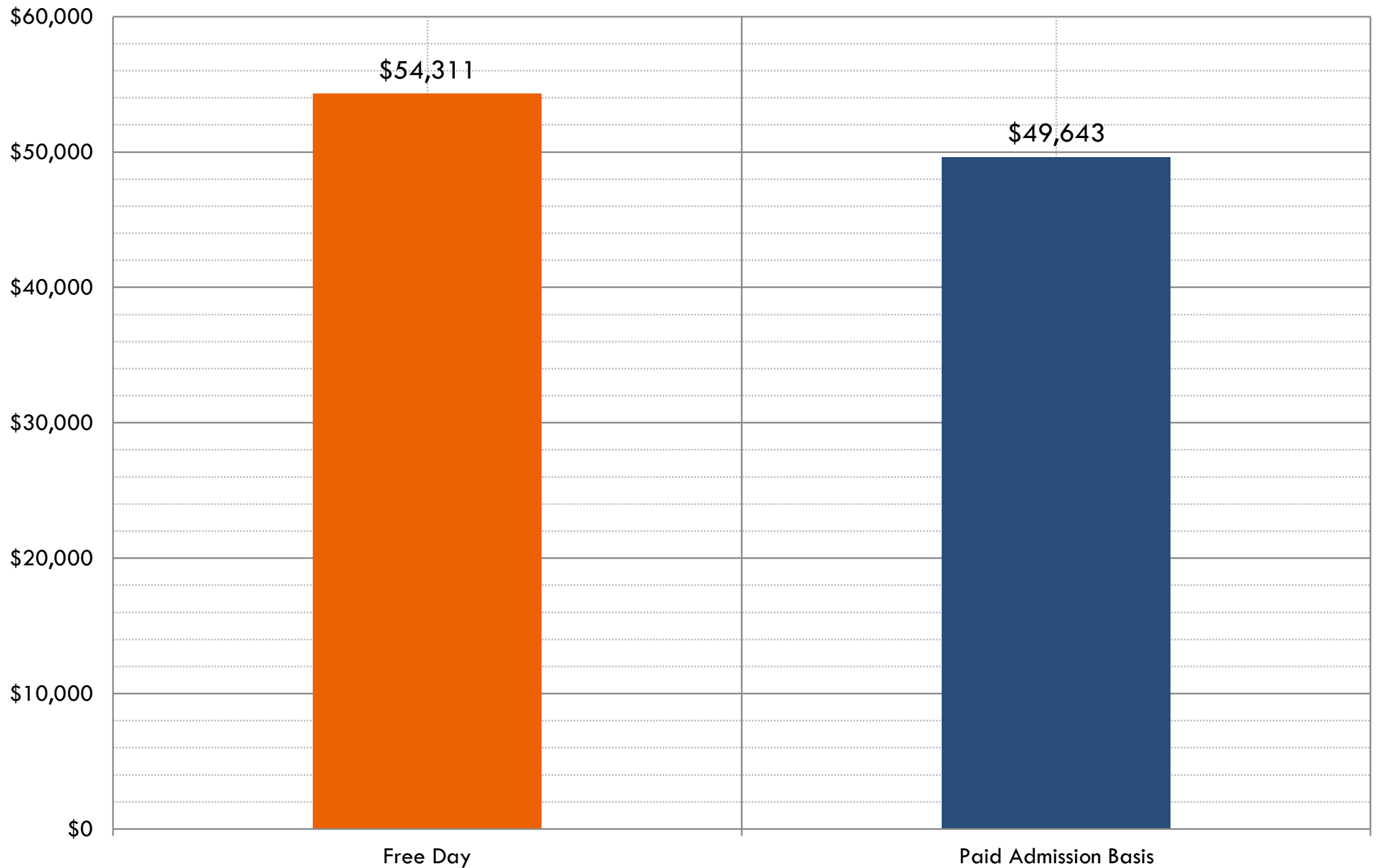


“To resist the illusion, there is only one thing you can do: You must learn to mistrust your impressions of the length of lines when fins are attached to them. To implement that rule, you must be able to recognize the illusory pattern and recall what you know about it.”

– Daniel Kahneman, *Thinking Fast And Slow*, p.27

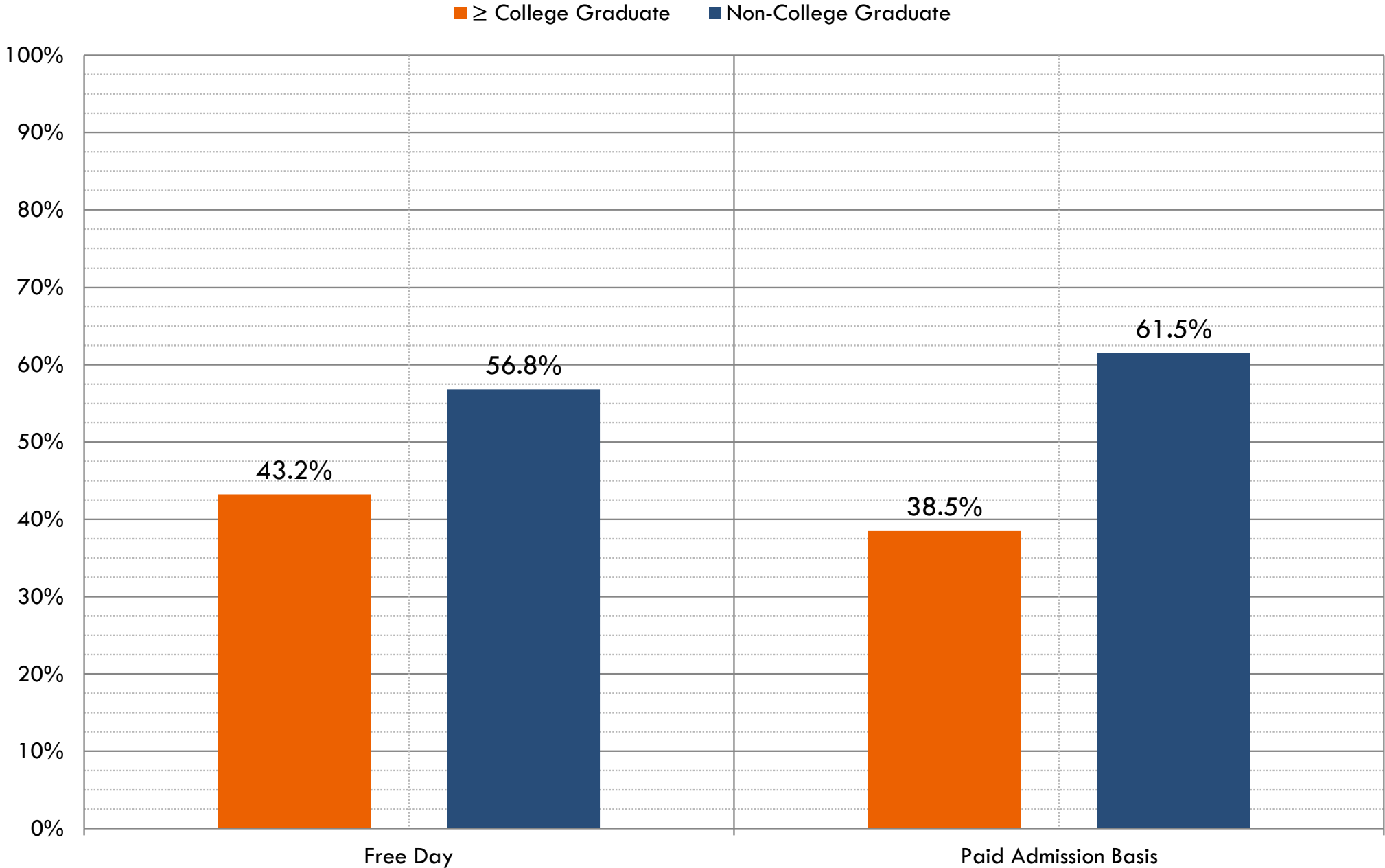
Visitor Annual Household Income

([Free day](#) vs. paid admission comparison)



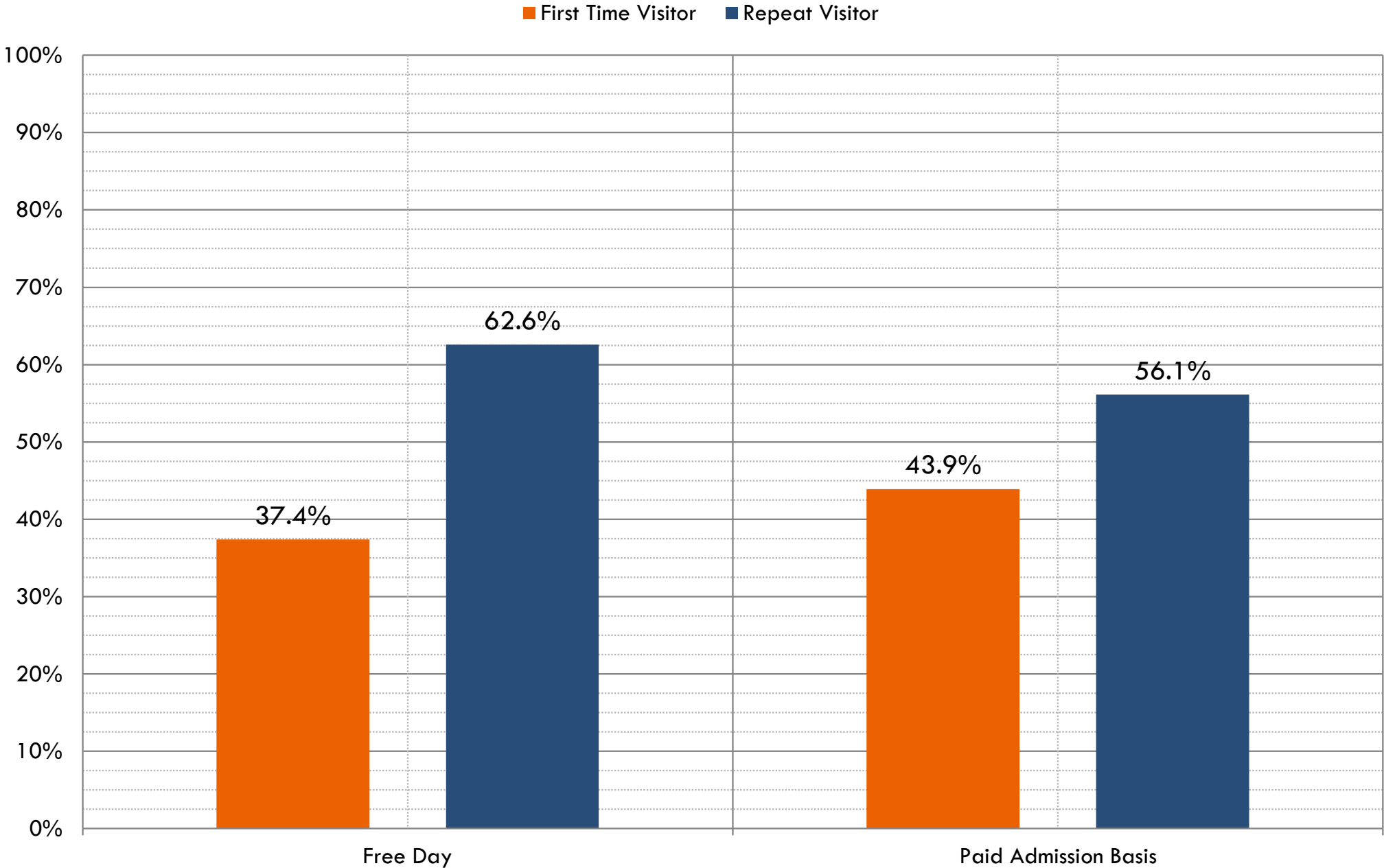
Visitor Educational Attainment

(Free day vs. paid admission comparison)



Visitor Profile

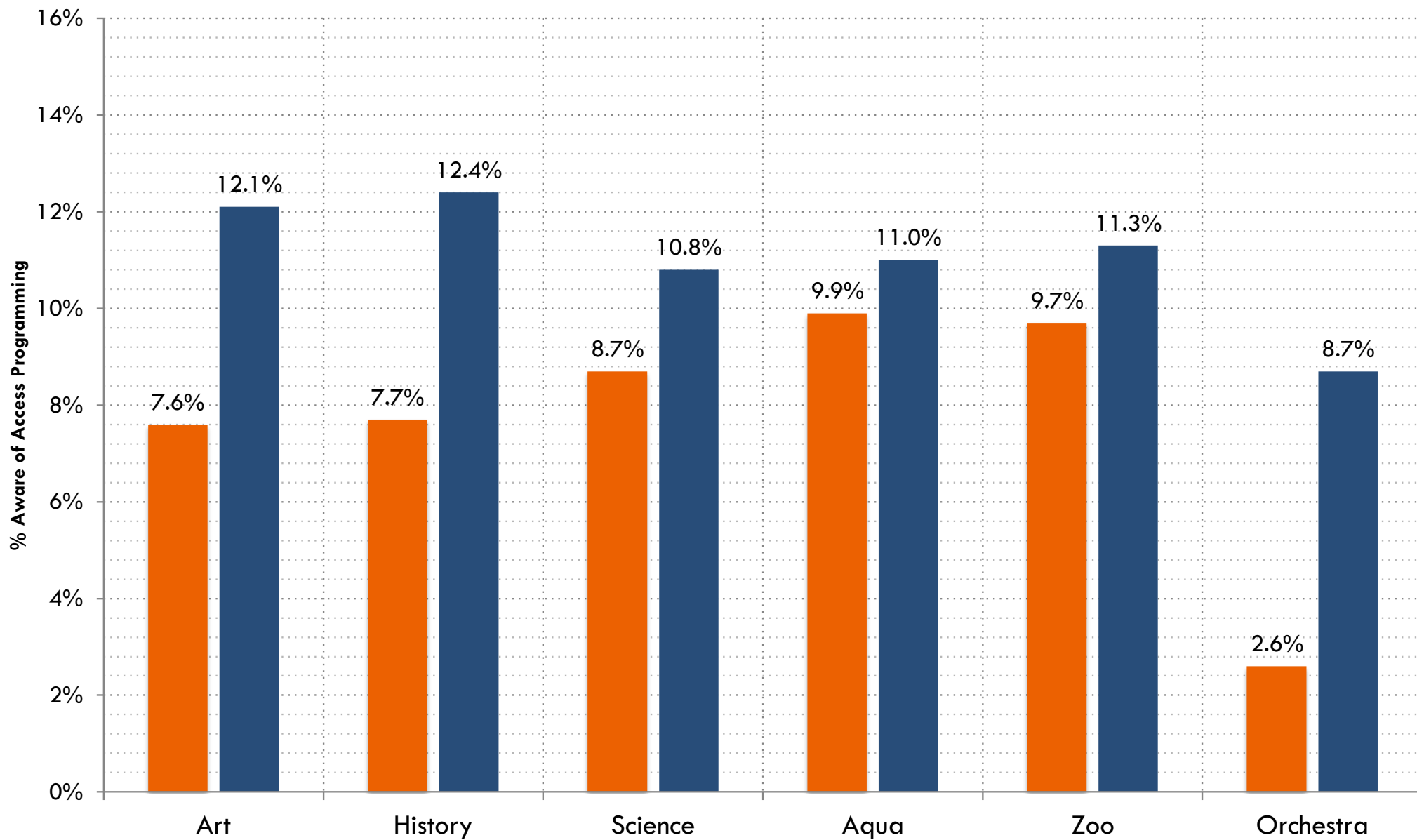
(First time vs. repeat visitor comparison)



Access programming awareness

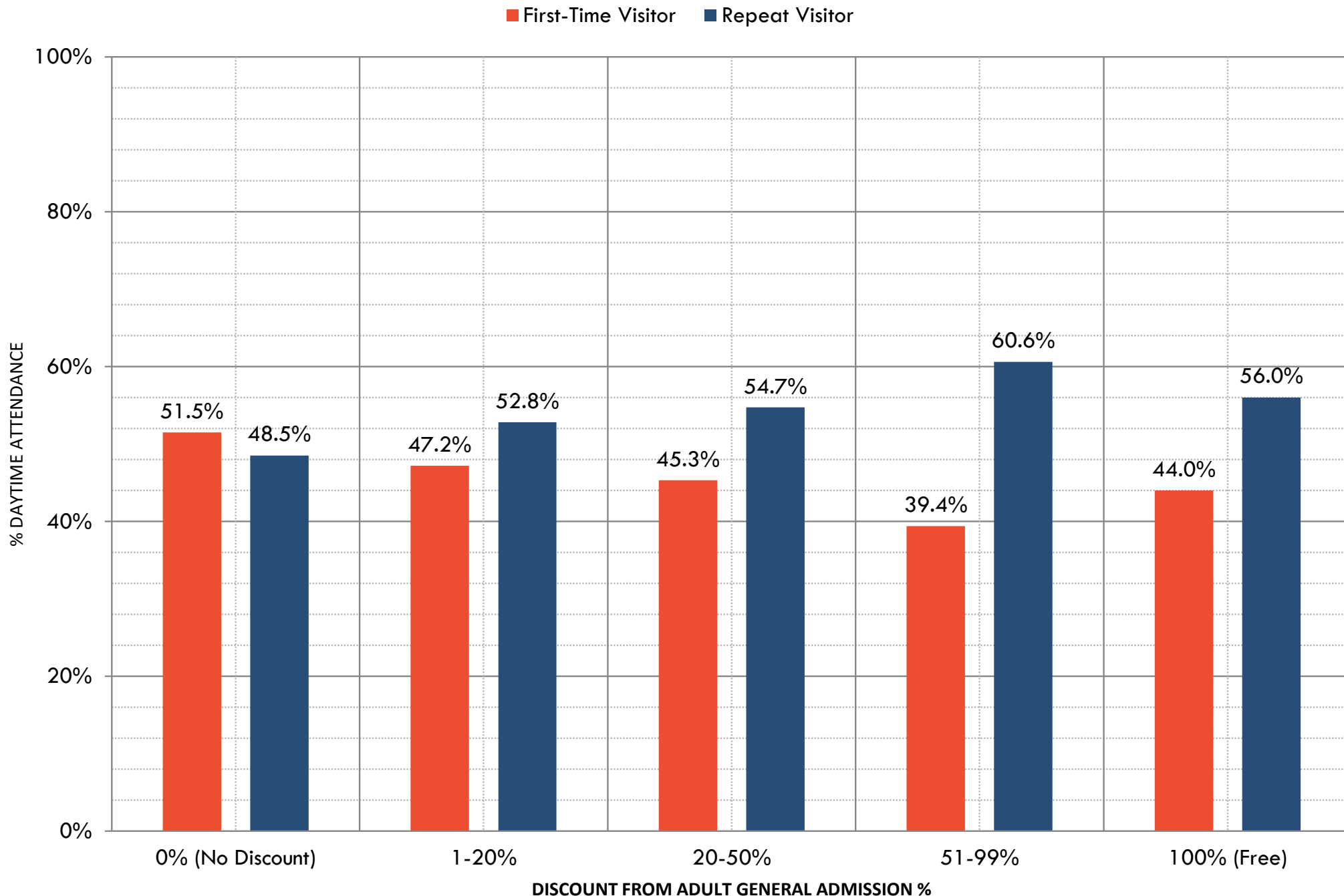
One year affirmative recall by household income

■ HHI <\$25,000 ■ HHI >\$250,000



Daytime Visitor Analysis

New and repeat visitation by reported discount from adult general admission price



Cognitive Biases

Confirmation bias is the tendency to search for, interpret, favor, and recall information in a way that confirms one's preexisting beliefs or hypotheses.

Availability cascade is the self-reinforcing process of collective belief formation by which an expressed perception triggers a chain reaction that gives the perception of increasing plausibility through its rising availability in public discourse.

Conservatism bias is a bias in information processing, which refers to the tendency to revise one's beliefs insufficiently when presented with new evidence. The bias describes human belief revision in which people over-weigh past perceptions and under-weigh new evidence.

~~“That doesn’t apply to us”~~

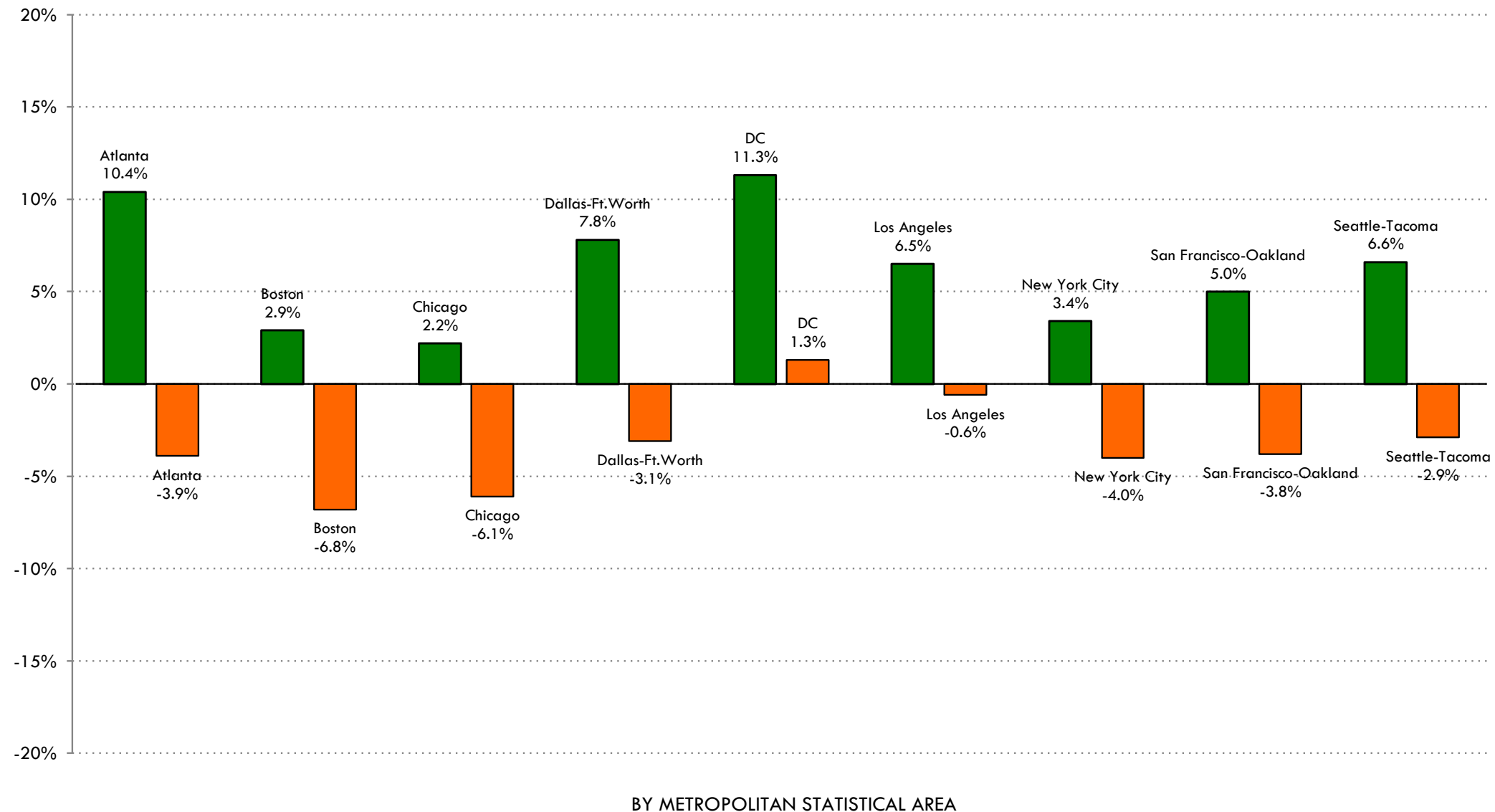
*“To what extent does this apply to us,
and how can we tackle this data-
informed issue?”*

Audiences and attendance behaviors

US Nonprofit Visitor-Serving Organization Performance

Attendance compared to high-propensity visitor population growth, years 2009-2018

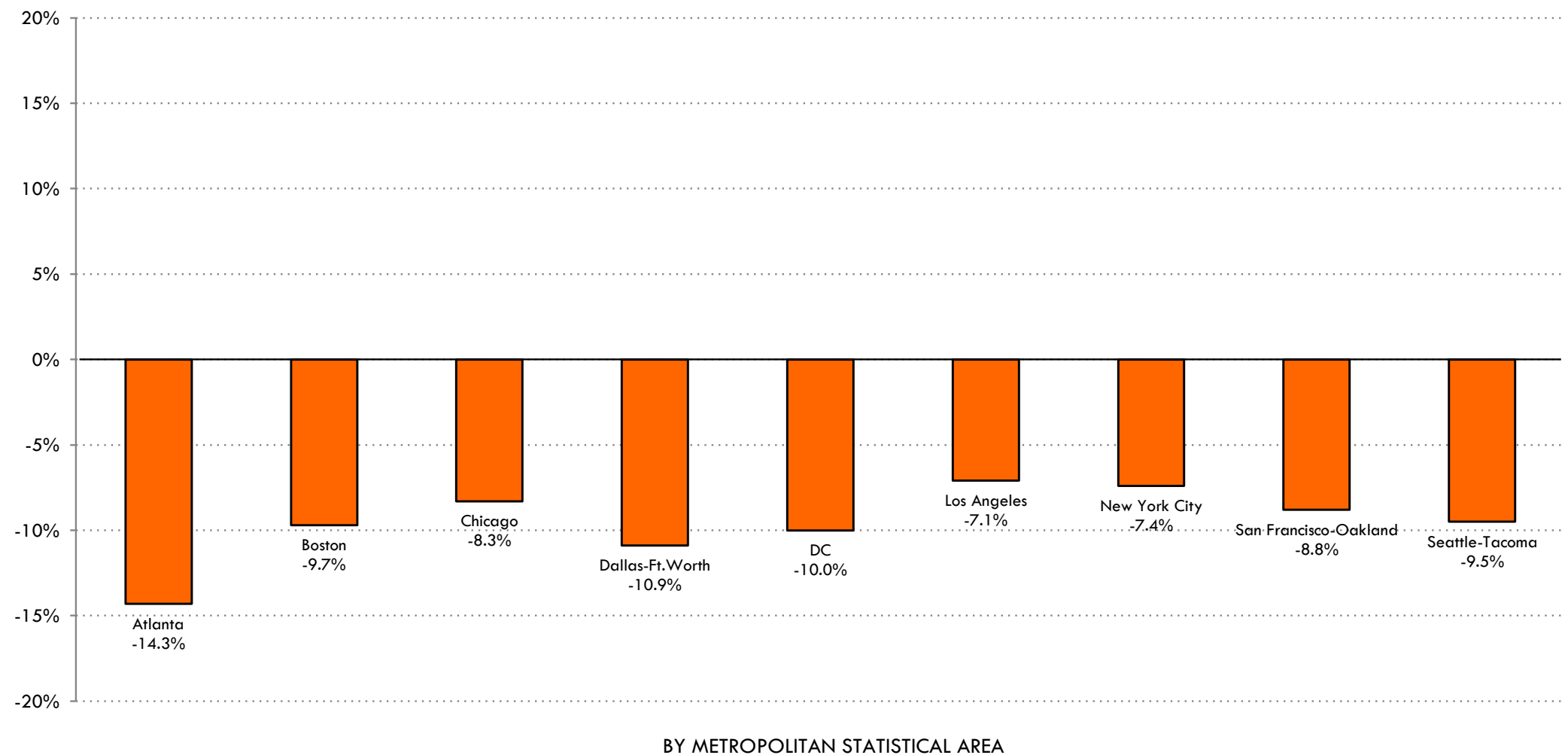
■ High-Propensity Visitor Population ■ Attendance

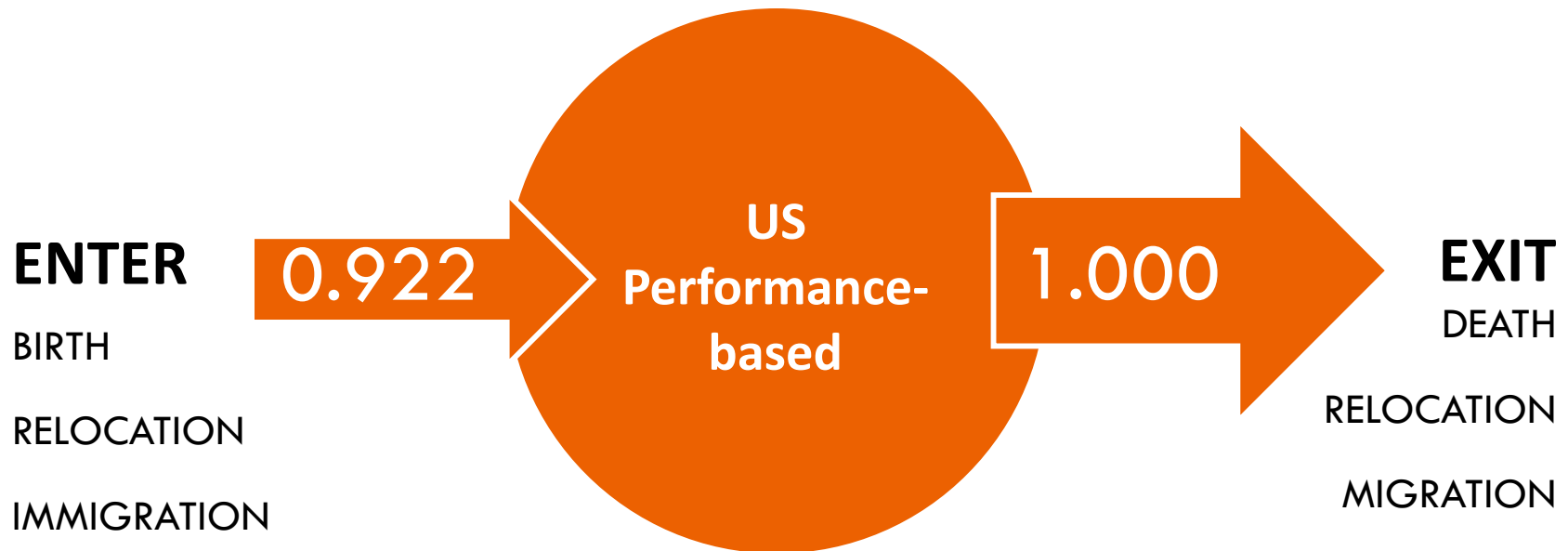
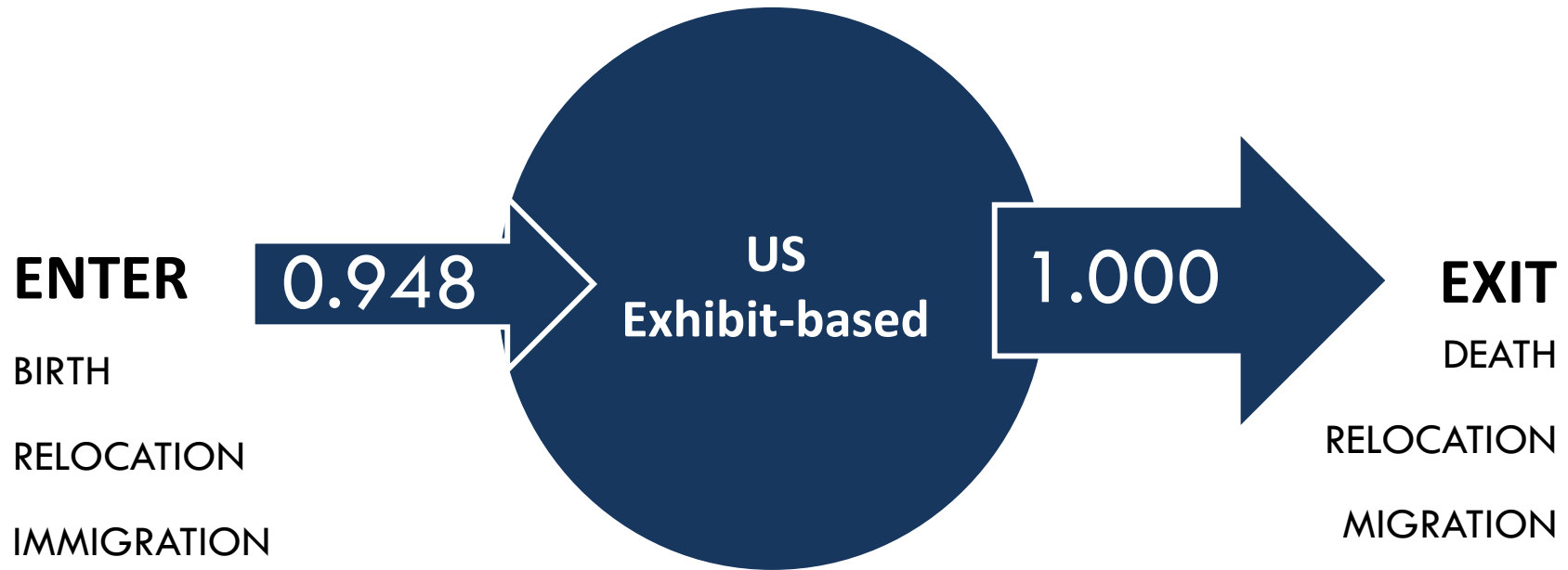


US Nonprofit Visitor-Serving Organization Performance

Attendance performance against high-propensity visitor population expectation, years 2009-2018

■ Performance Against Expectation





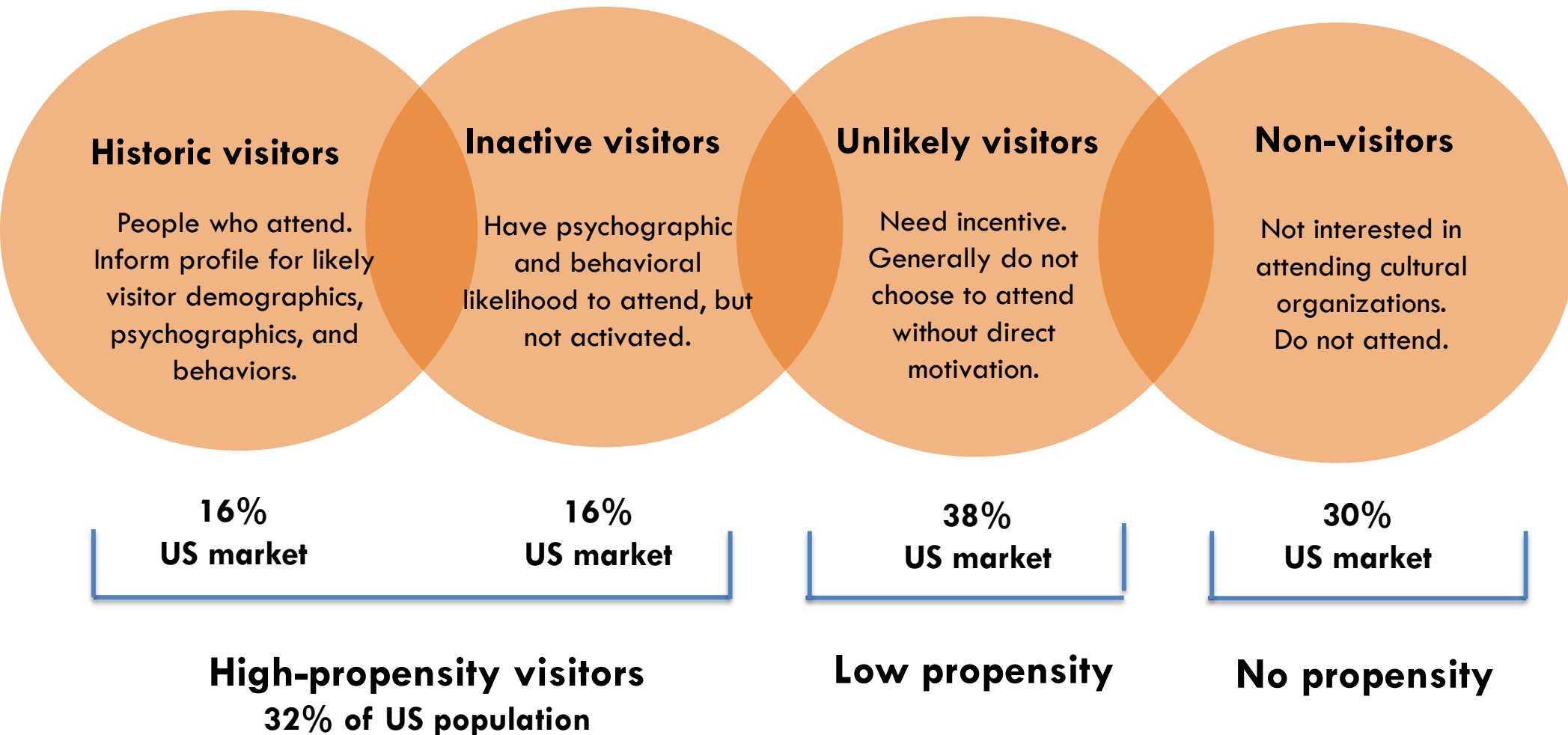
Fewer in + More out = **Shrinking visitor base**
(**NEGATIVE SUBSTITUTION**)



Fewer in + More out = **Shrinking visitor base**
(**NEGATIVE SUBSTITUTION**)

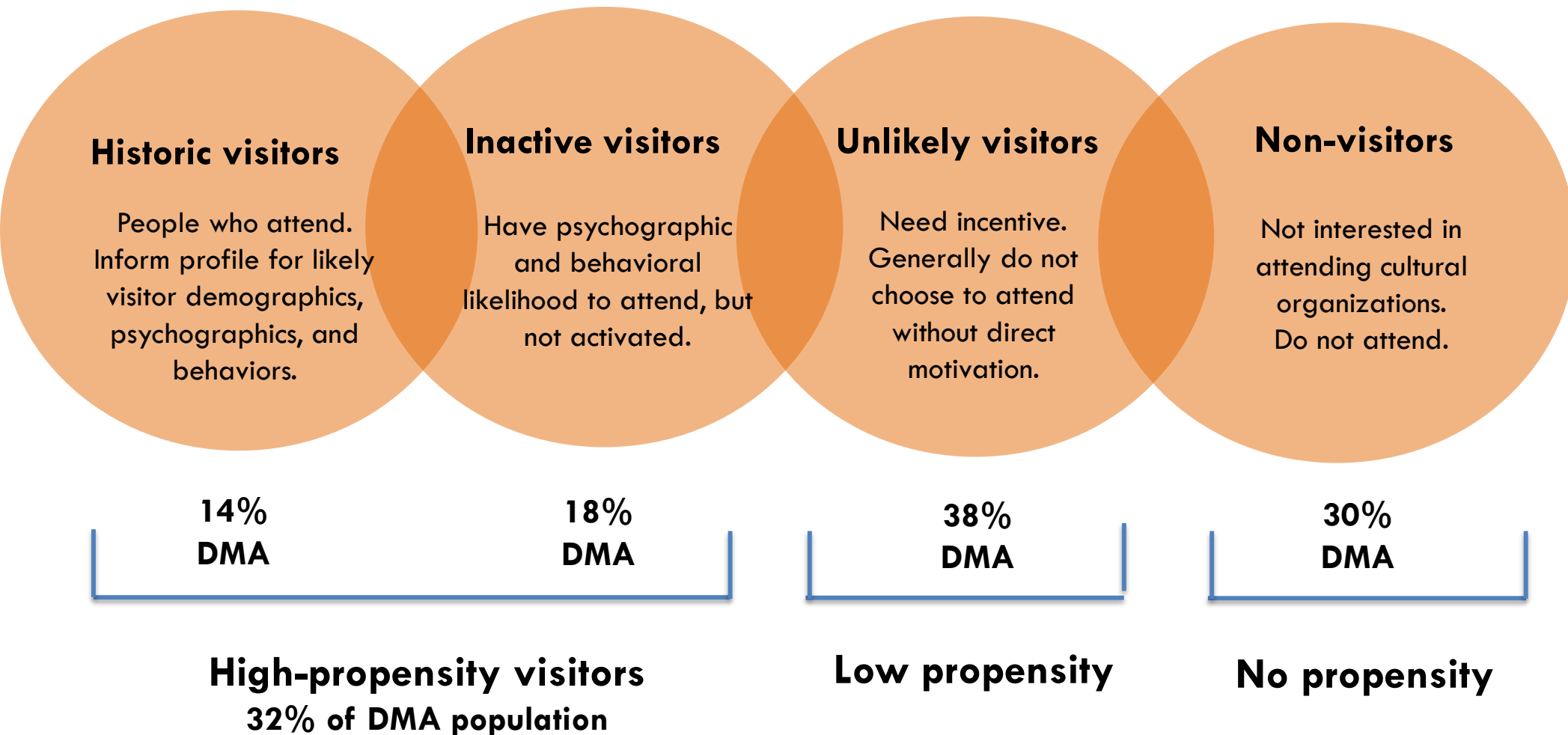
Visitor and non-visitor cohorts for cultural organizations

United States



Visitor and non-visitor cohorts for cultural organizations

DMA (Atlanta, GA MSA + Columbus, GA)



Profile attributes of a cultural historic visitor

(Adult visitors within the past 24 months to a US cultural organization)

1. White non-Hispanic
2. 3.1 x times more likely to have graduated college
3. Average HHI \$113,000
4. Super-connected (i.e. broadband access at home, work and mobile)
5. Home owner (mean value \$359,000)
6. Online shopper/consumer (online annual spend >\$2,500)
7. 4.2x more likely to have traveled for leisure purposes within the past year
8. Resides near urban areas (within 20 miles of major metro)
9. Dines out of home >2x weekly
10. 2.3x more likely to be a domestic pet owner
11. 2.9x more likely to own >2 vehicles... including one “hobby/recreational” car
12. Self-describes as “Active” and/or “Healthy” lifestyle
13. “Organic” consumers (i.e. purchase organics, shop at “Whole Foods-like” outlets, farmer’s markets)
14. 5.4x more likely to subscribe to a travel magazine
15. 3.3x more likely to pursue low intensity outdoor activity within the past year (e.g. hiking, skiing, golfing, etc.)

Attributes of cultural inactive visitors

(Adult non-visitors within the past 24 months to a US cultural organization)

1. 3.0x times more likely to have graduated college
2. Average HHI \$111,000
3. Super-connected (i.e. broadband access at home, work and mobile)
4. Home owner (mean value \$342,000)
5. Loyal online shopper/consumer (online annual spend >\$5,000)
6. 5.1x more likely to have traveled for leisure purposes within the past year
7. Resides near urban areas (within 20 miles of major metro)
8. Dines out of home >3x weekly
9. 2.4x more likely to be a domestic pet owner
10. Self-describes as “Active” and/or “Healthy” lifestyle
11. “Organic” consumers (i.e. purchase organics, shop at “Whole Foods-like” outlets, farmer’s markets)
12. 4.6x more likely to pursue low intensity outdoor activity within the past year (e.g. hiking, skiing, golfing, etc.)
13. 6.8x more likely to have traveled to a foreign country for leisure purposes within the past year
14. 4.3x more likely to be a “cord cutter” (i.e. no cable or satellite residential TV)
15. 5.5x more likely to not subscribe to any print media publications

How do inactive visitors compare to active visitors?

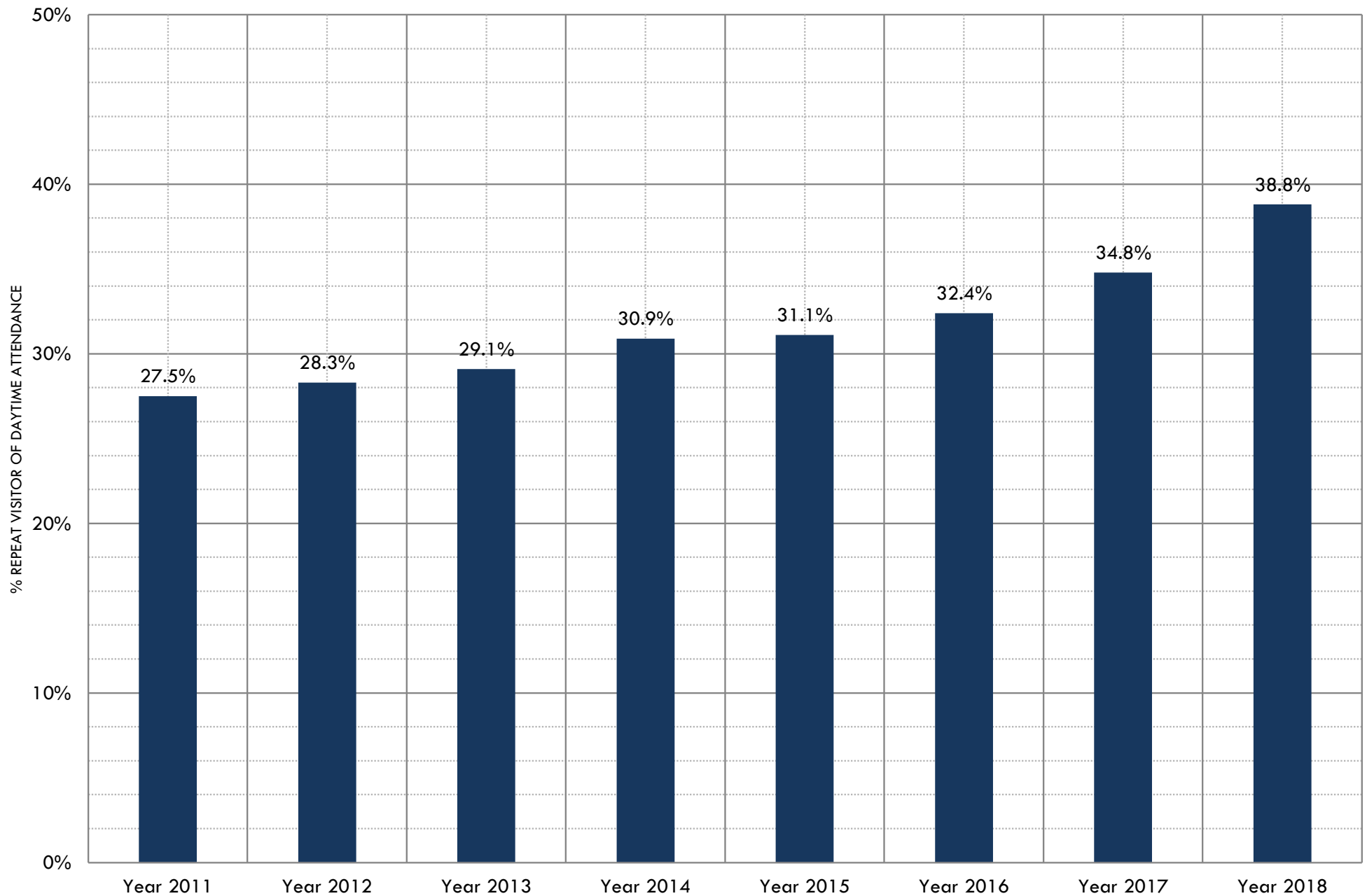
Inactive visitors are...

- more racially and ethnically diverse
- highly educated – similar to active visitors
- Super-connected
 - Online shoppers
 - Not likely to subscribe to print publications
 - “Cord cutters”
- Even more active and competitive
 - Dine out more often
 - More likely to travel for leisure purposes, travel internationally
 - More likely to engage in low-intensity activities

These people are educated, and more diverse and active

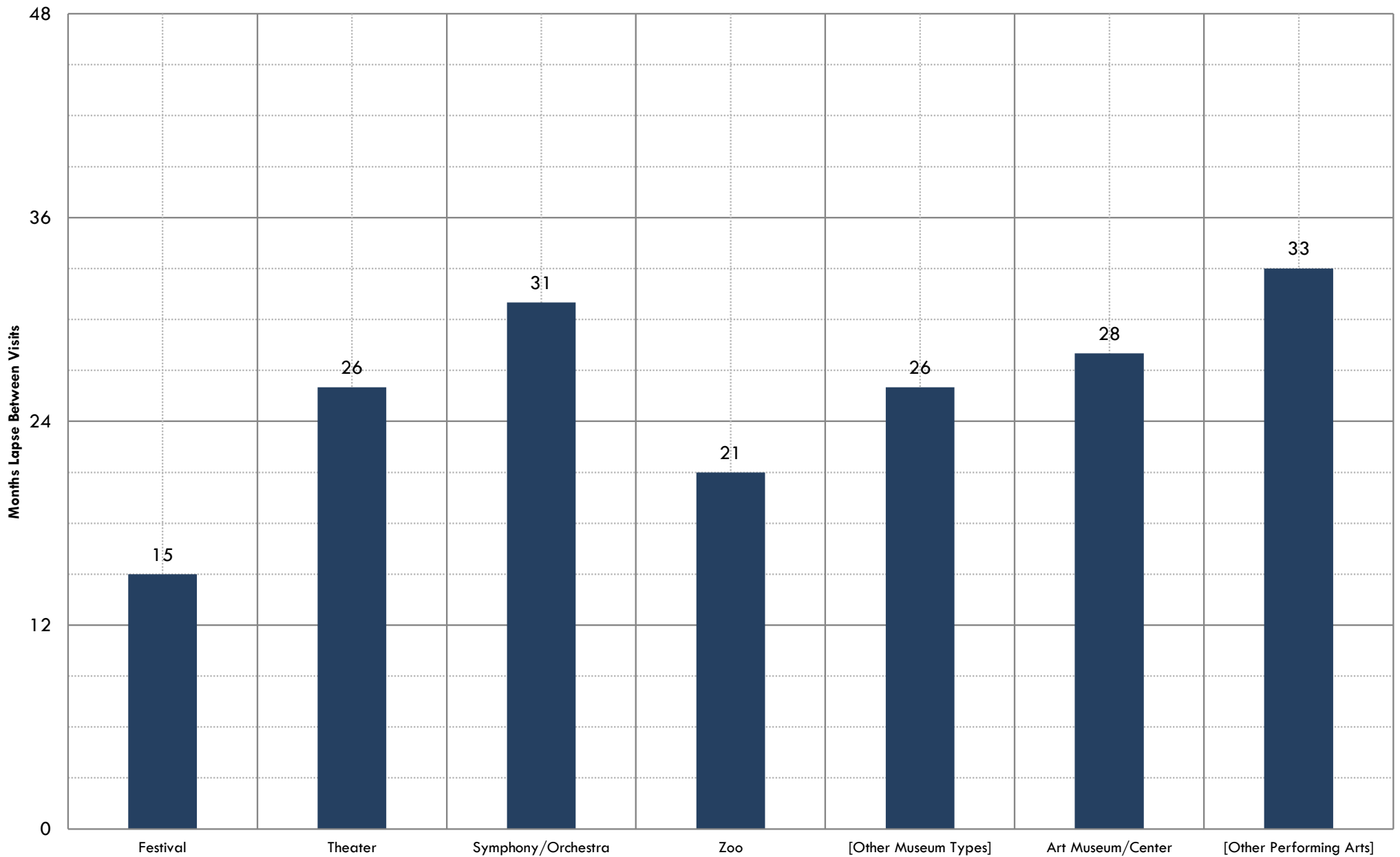
Repeat Visitation to Visitor-Serving Organizations

(US Adults, Years 2011-2018)



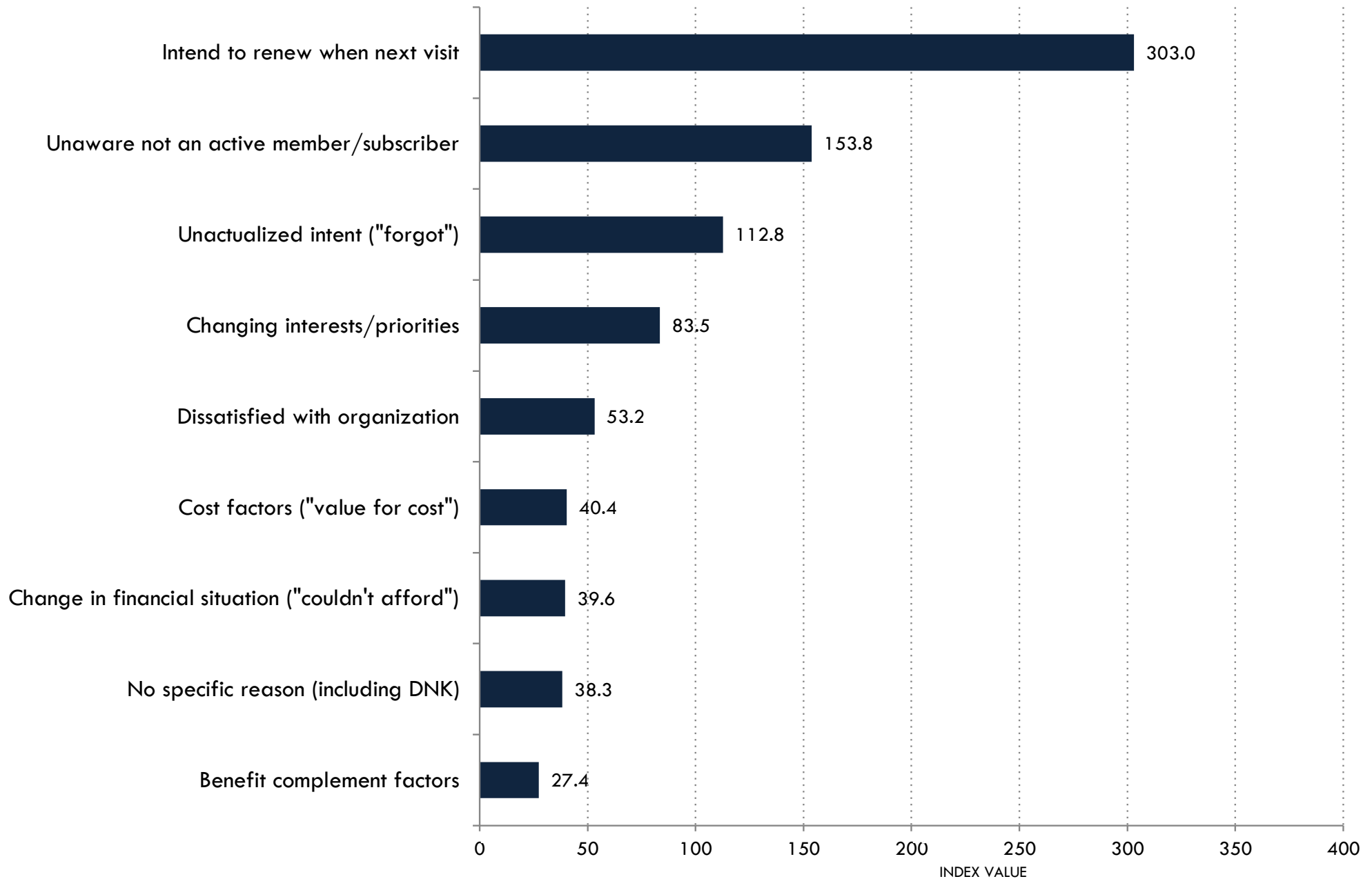
Average Re-Visitation Chronology by Organization Type

United States visitors to cultural organizations



Why did you not renew?

(GA resident, High-propensity member/subscriber profile +
Previous cultural member/subscriber to who had did not renew within 24 months)

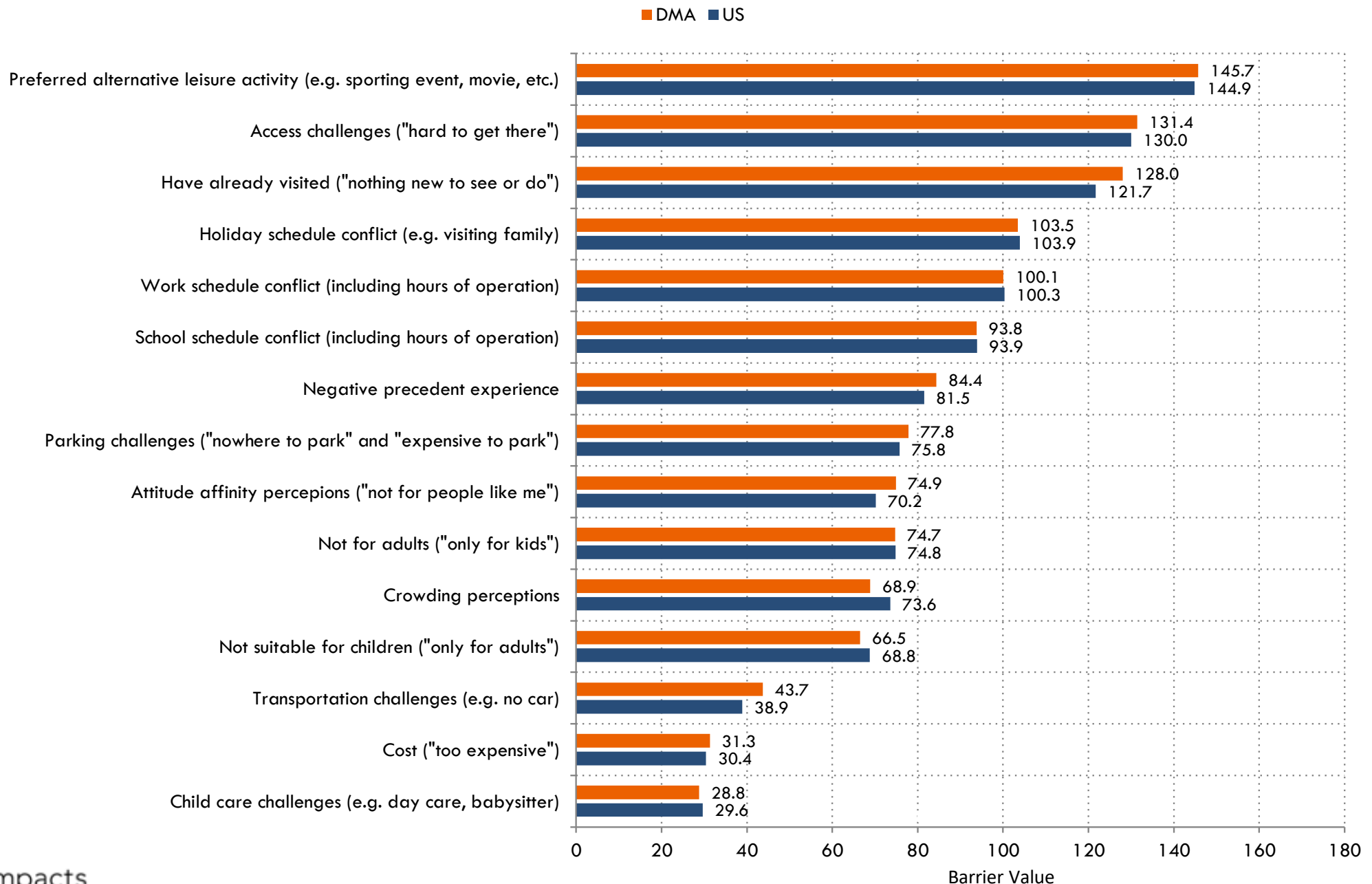


Barriers and opportunities

Barriers to visitation

Exhibit-based

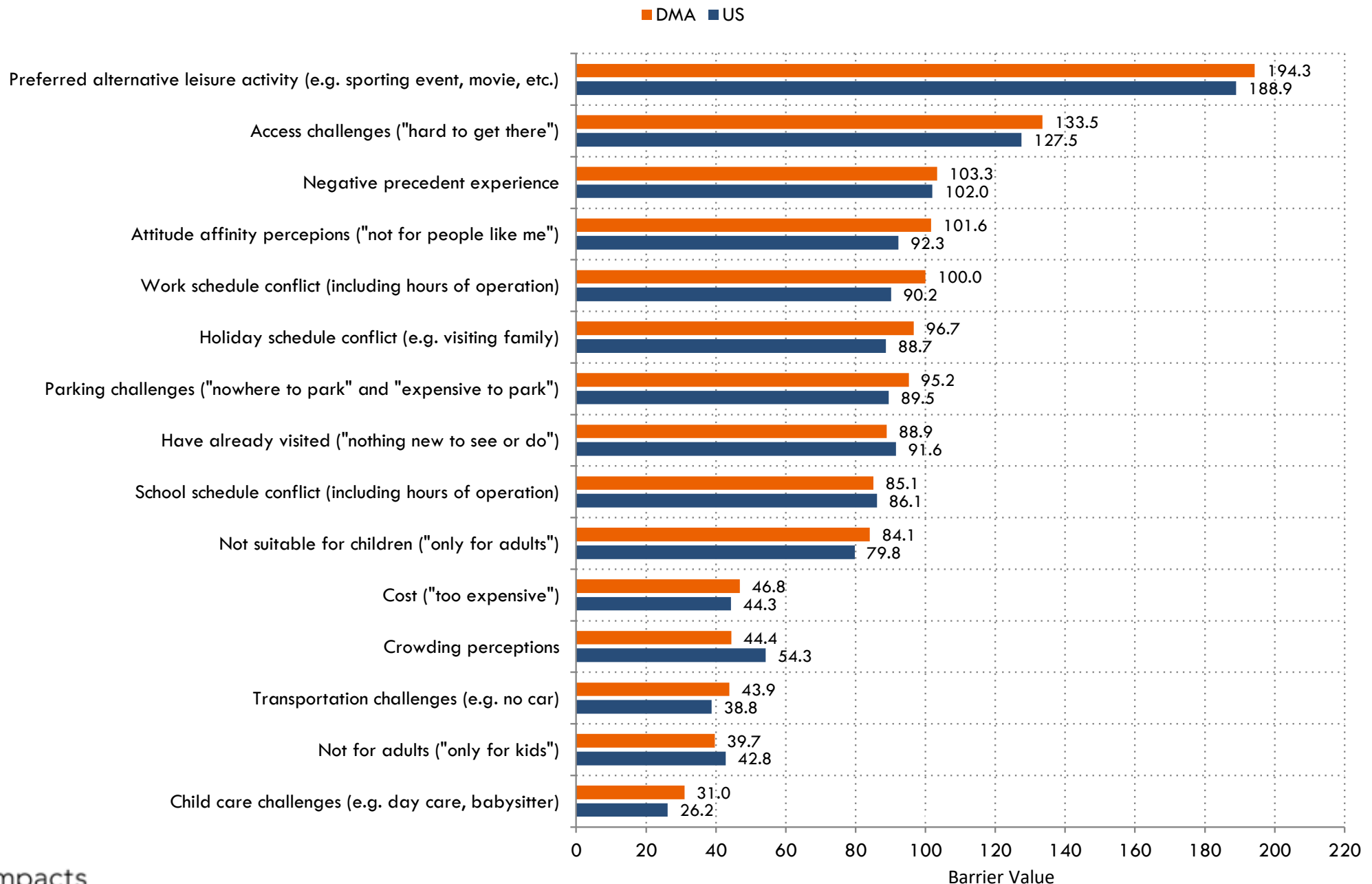
Given your interest in visiting a cultural organization, why haven't you visited within the past two years?



Barriers to visitation

Performance-based

Given your interest in visiting a cultural organization, why haven't you visited within the past two years?



Top barriers to visitation within the region

Exhibit-based:

1. Preferred alternative leisure activity
2. Access challenges
3. “Nothing new to do or see”
4. Holiday schedule
5. Work schedule

Performance-based

1. Preferred alternative leisure activity
2. Access challenges
3. Negative experience
4. “Not for people like me”
5. Work schedule

Top barriers to visitation within the region

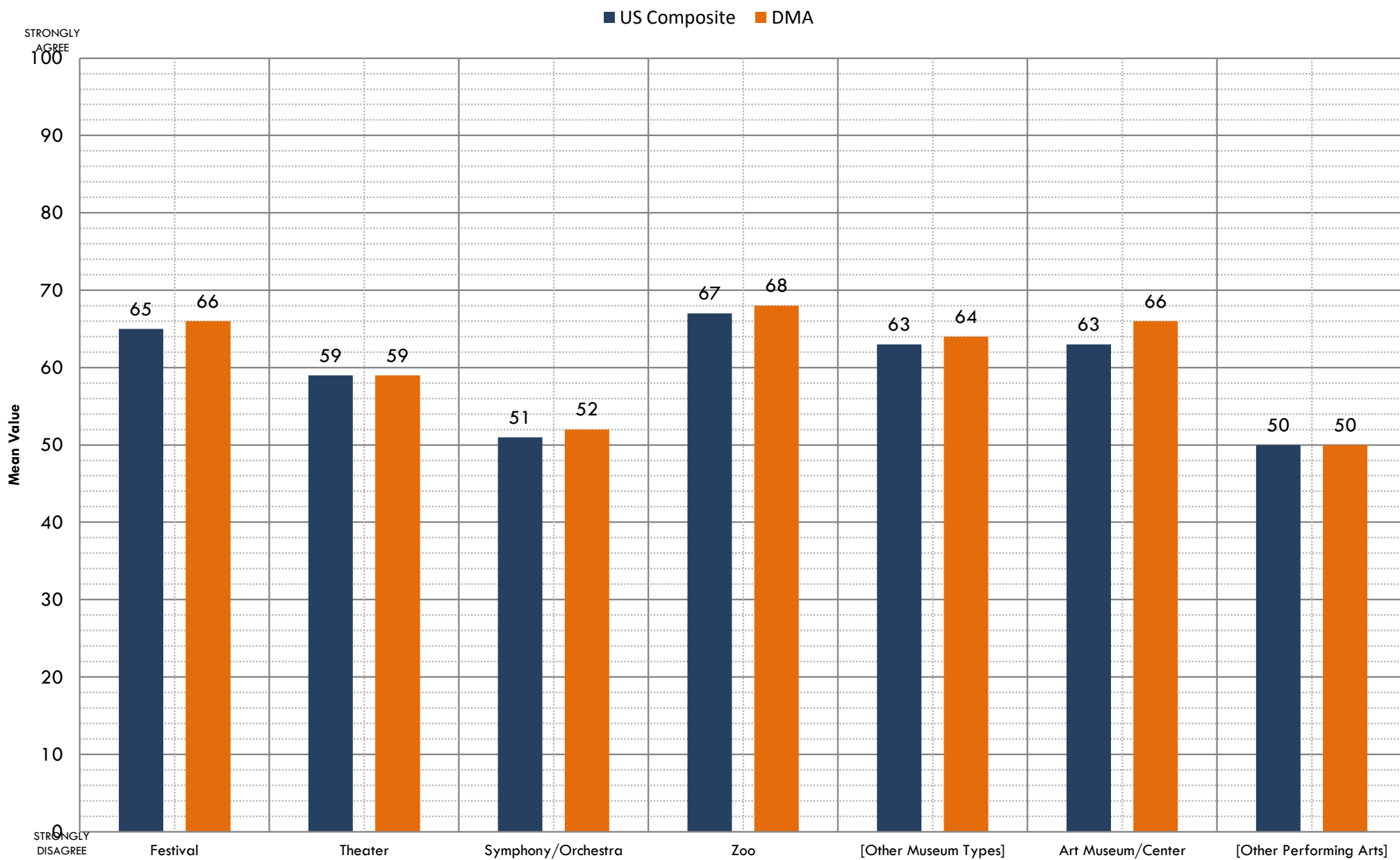
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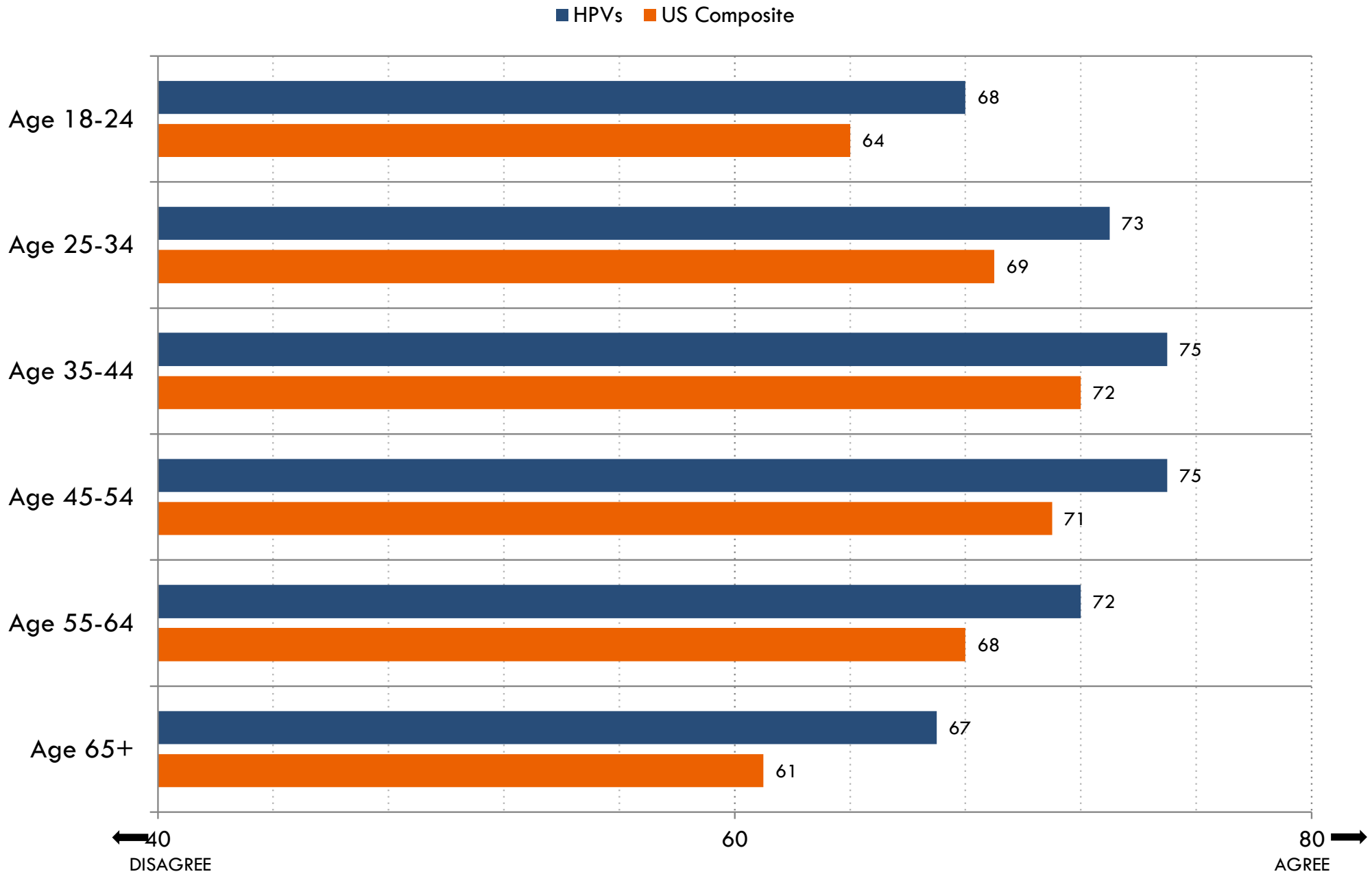
Performance-based

1. Preferred alternative leisure activity
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I am interested in visiting a(n) ...

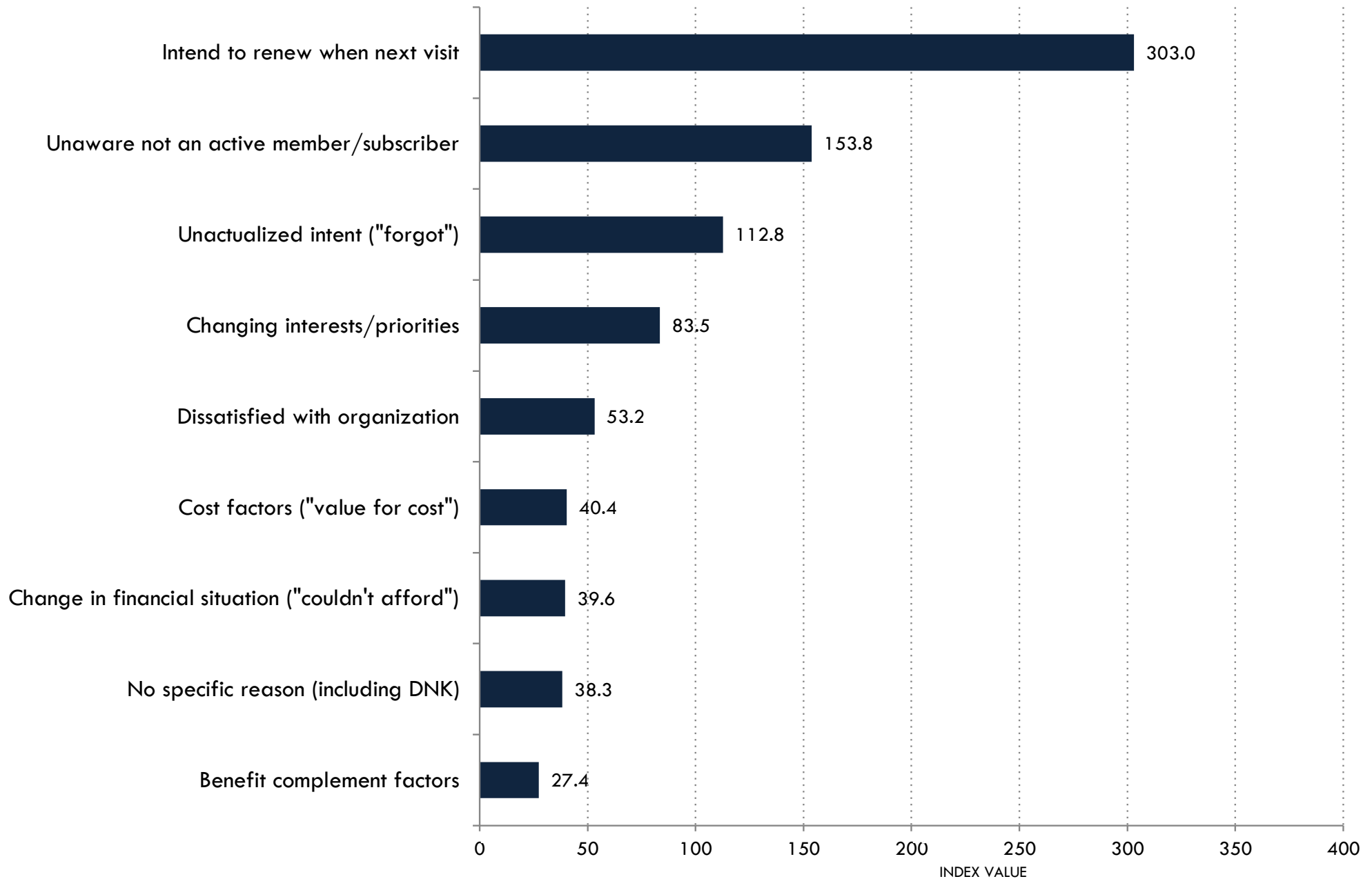


“My time is more valuable than my money.”



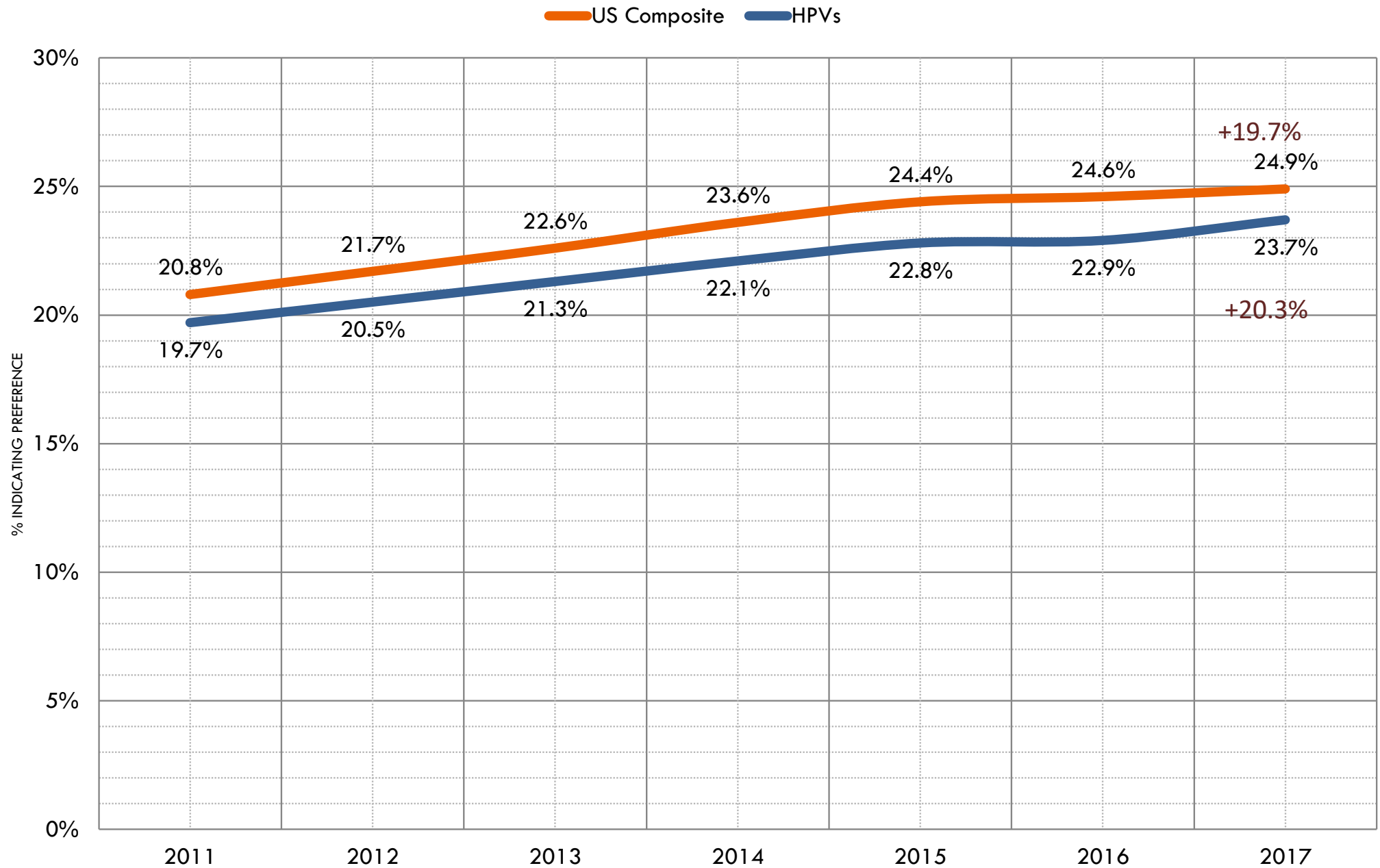
Why did you not renew?

(GA resident, High-propensity member/subscriber profile +
Previous cultural member/subscriber to who had did not renew within 24 months)



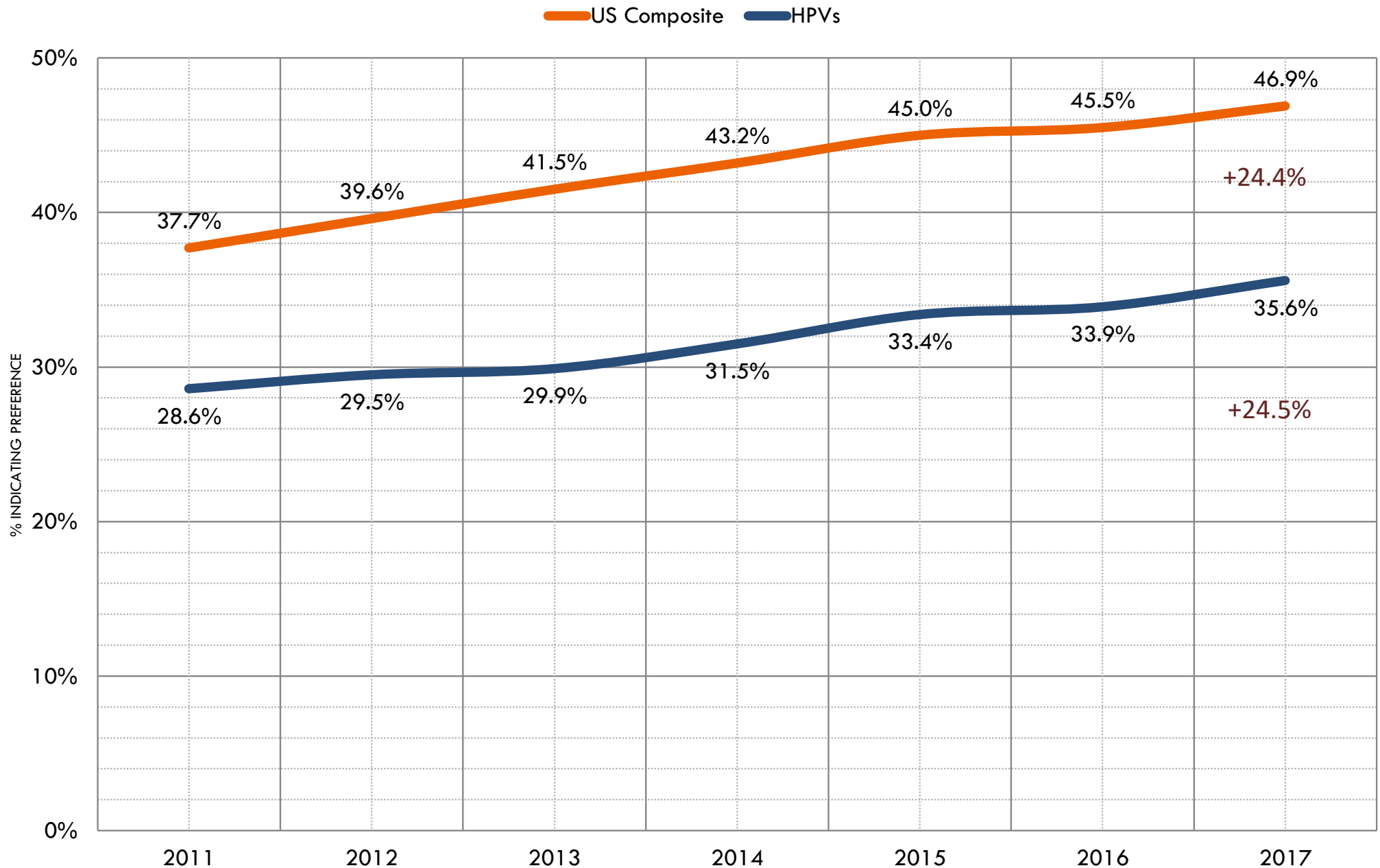
“Stay home” during week preference

Five-year tracking (years 2011-2017)



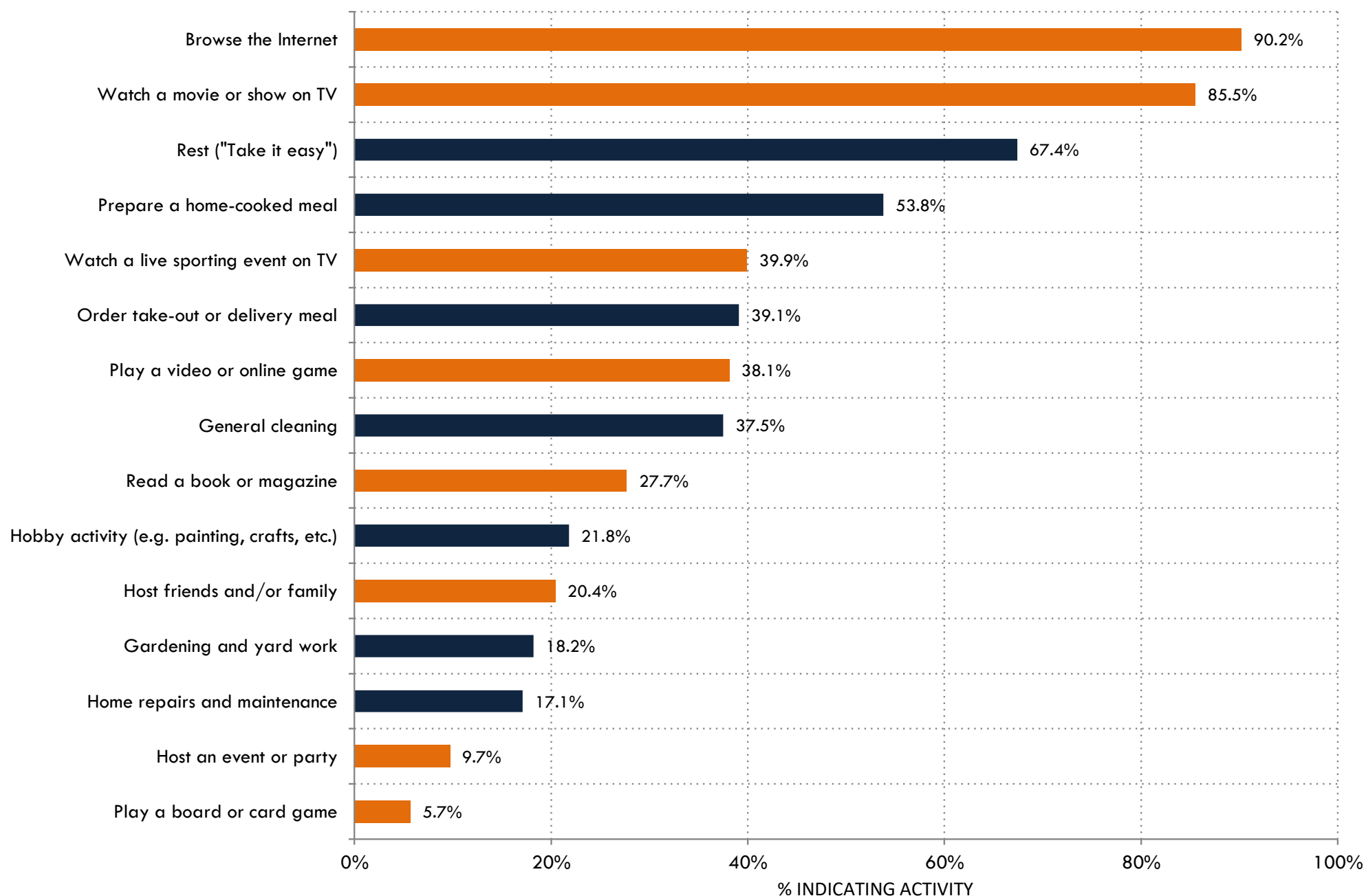
“Stay home” during weekend preference

Five-year tracking (years 2011-2017)



Home-based activities

(Among respondents preferring to stay home)



Top barriers to visitation within the region

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Performance-based

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5. Work schedule

Barriers: Access Challenges

Lexical analysis of perceived complaints by descending frequency of mention

1. Hard to get there/travel distance

(physical remoteness and/or time required to commute)

2. Hard to plan

(lack of advance planning information)

3. Hard to purchase/transact

(advance purchase and/or ticketing infrastructure)

4. Non-responsive to inquiries or requests

(inadequate social care)

5. Non-compliant building or experience

(physical and/or health limitations)

Top barriers to visitation within the region

Exhibit-based:

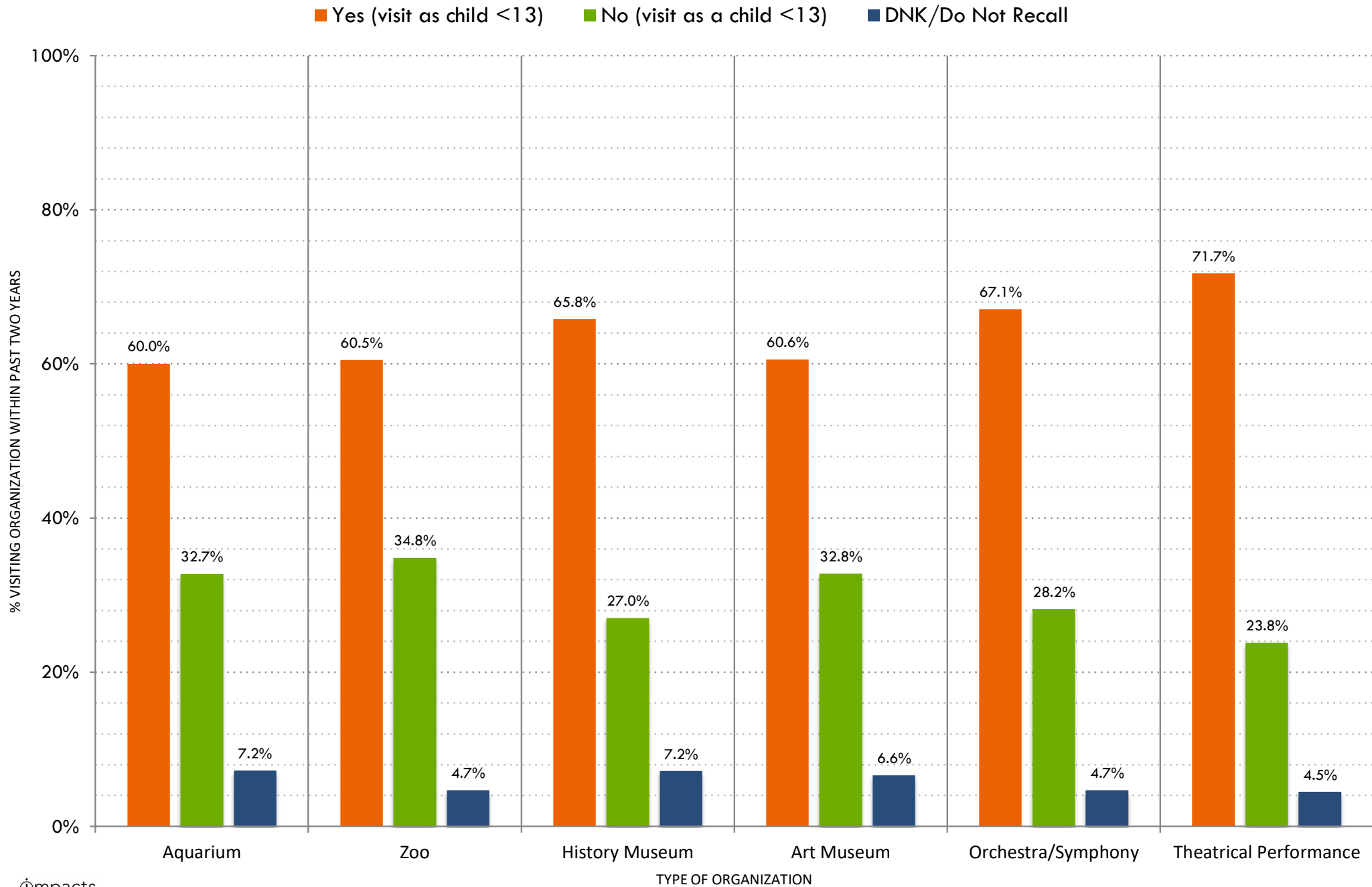
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Performance-based

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Precedent childhood experiences of recent visitors

All recent visitors segmented by visit to same organization type as a child under age 13



What does this barrier mean for us?

1. Past decisions and programs are impacting attendance today
1. Current decisions and programs are impacting attendance tomorrow
1. We need to work that much harder to “show” that today is different than yesterday.

Top barriers to visitation within the region

Exhibit-based:

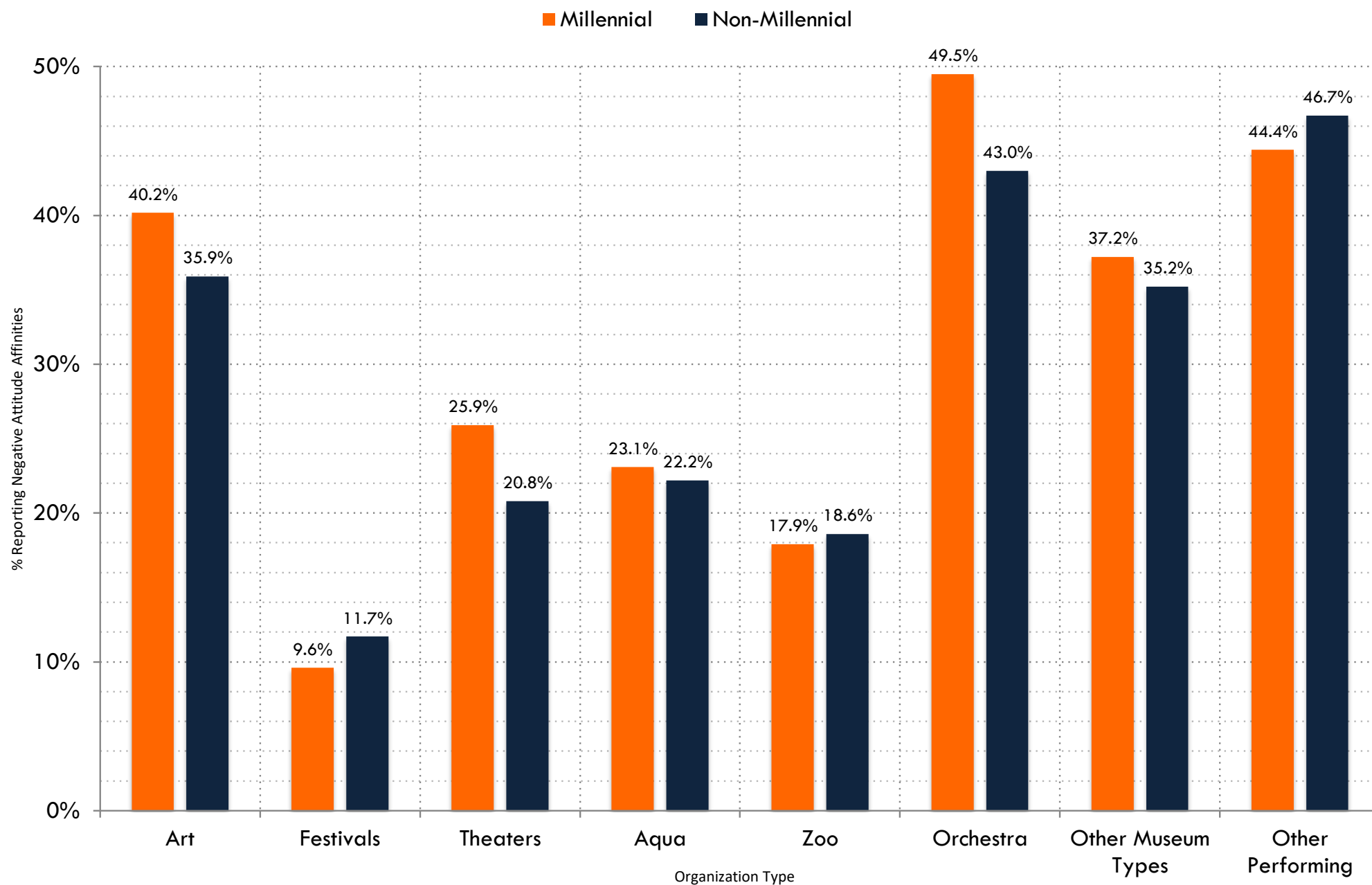
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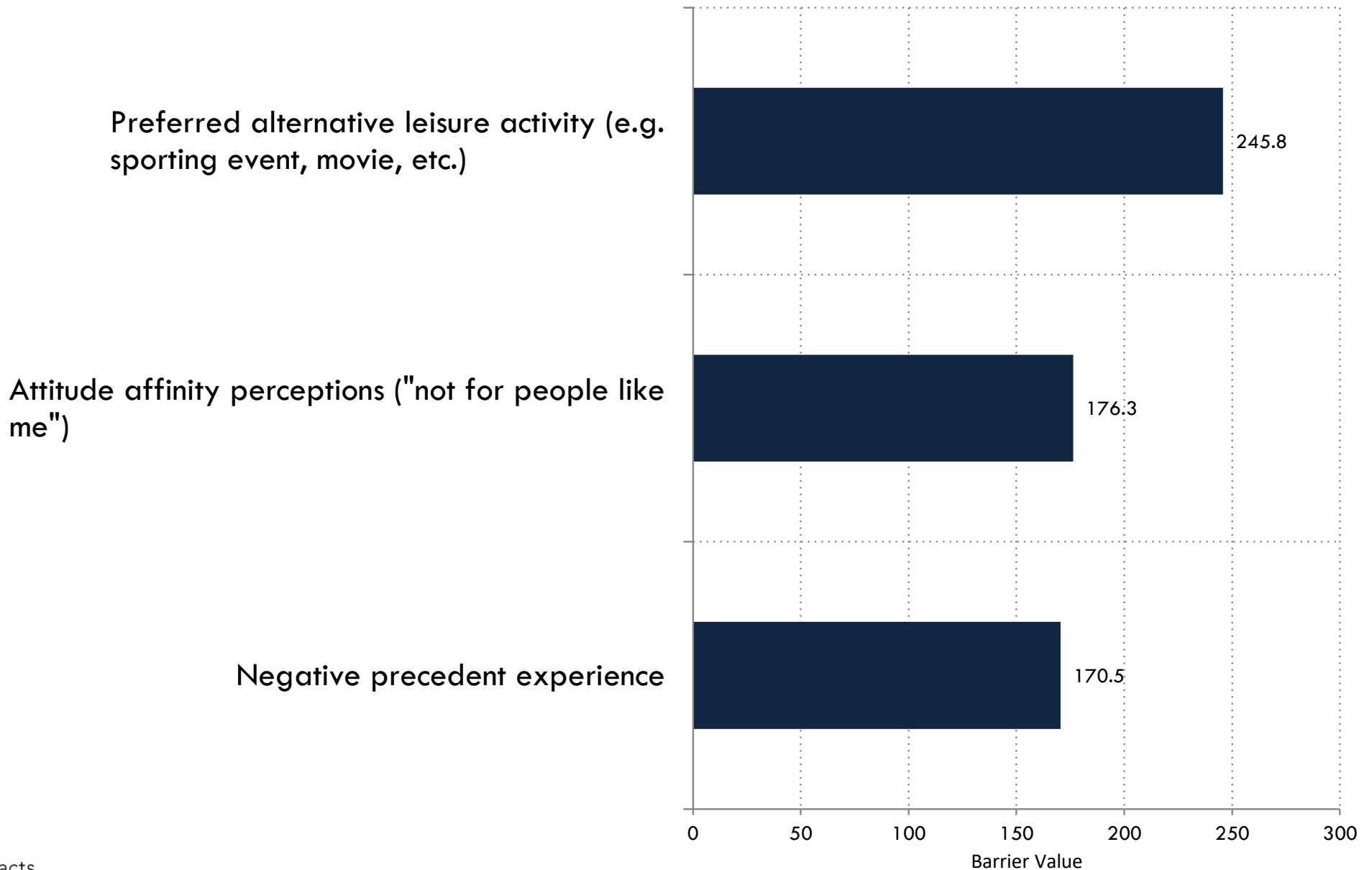
Negative attitude affinities

Adult visitors by organization type



Barriers to visitation

Why do you describe yourself as “unlikely” to visit a cultural organization in the next two years?



Embedding vs. “adding on” diversity, equity, and inclusion

- Board members who represent desired audiences
- Leaders that represent desired audiences
- Staff that represent desired audiences
- “Showing” audiences that this value is embedded when they attend

It is difficult to “one-off program” your way to overcoming negative attitude affinities.

Top barriers to visitation within the region

Exhibit-based:

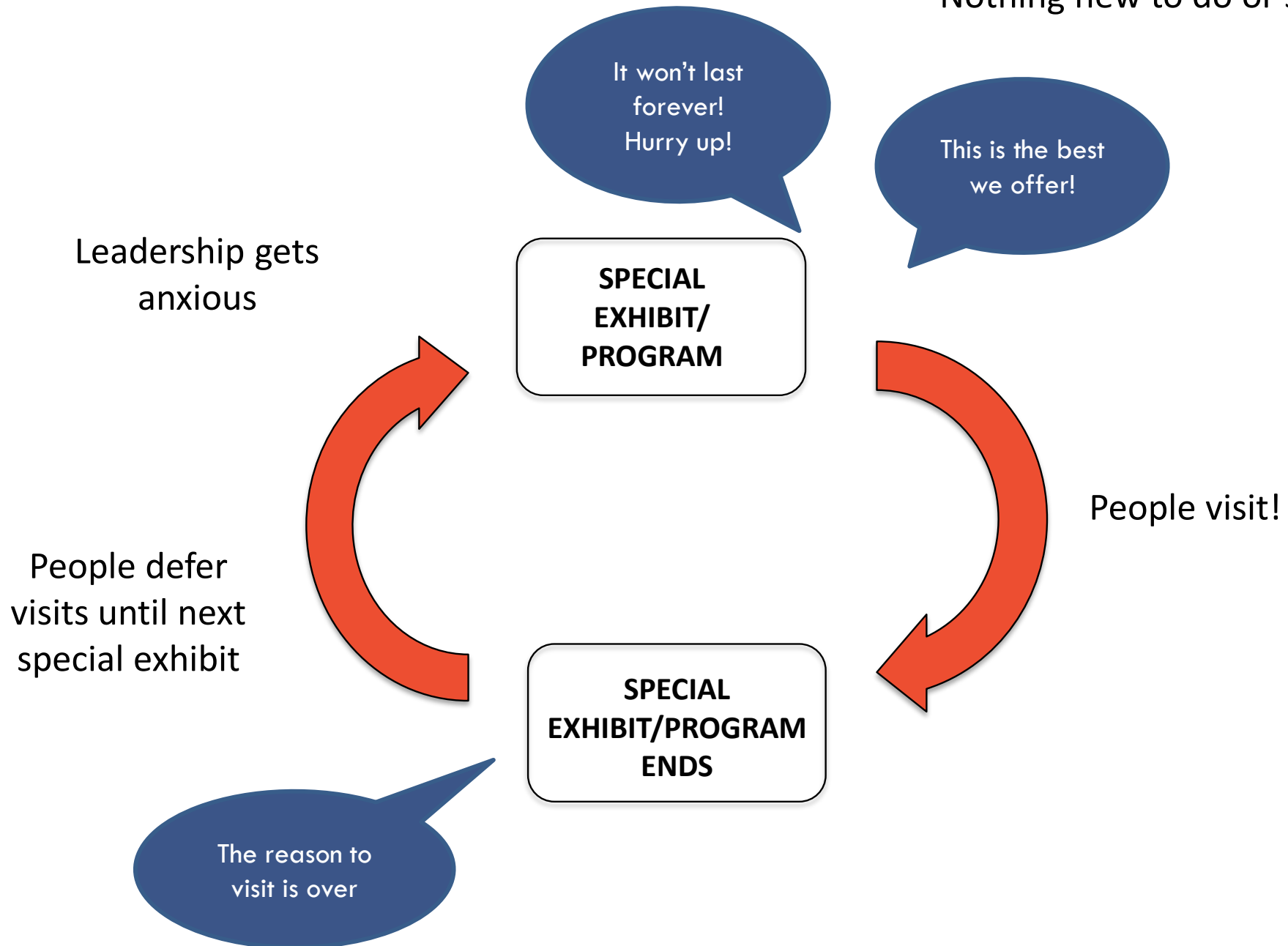
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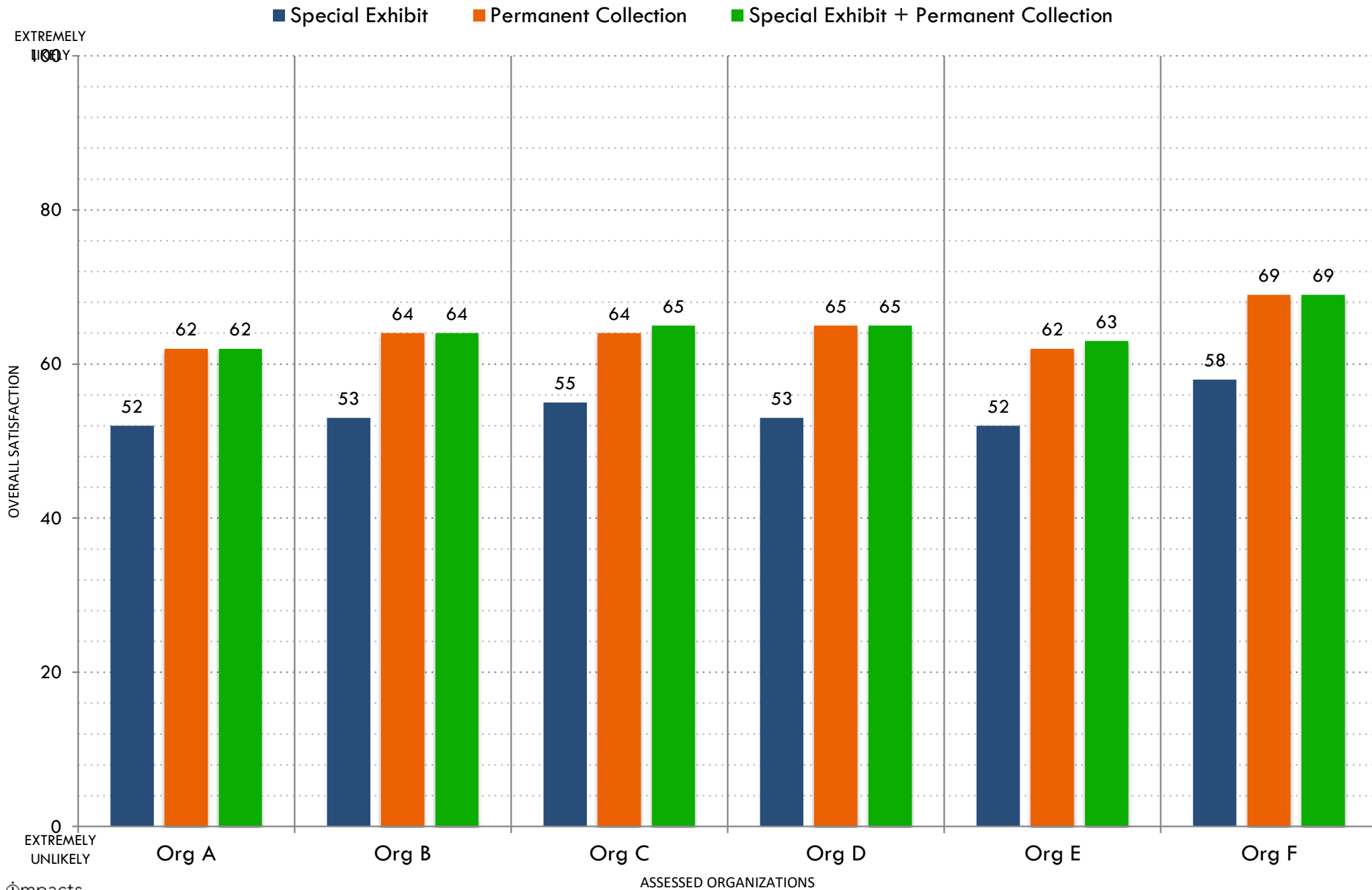
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“Special” exhibit/program cycle

“Nothing new to do or see”



Intent to re-visit within one year by onsite experience



Desired perception:

We can be counted upon to provide a *reliably relevant* and satisfying experience. This is not conditional based upon the program, exhibit, or performance.

Top barriers to visitation within the region

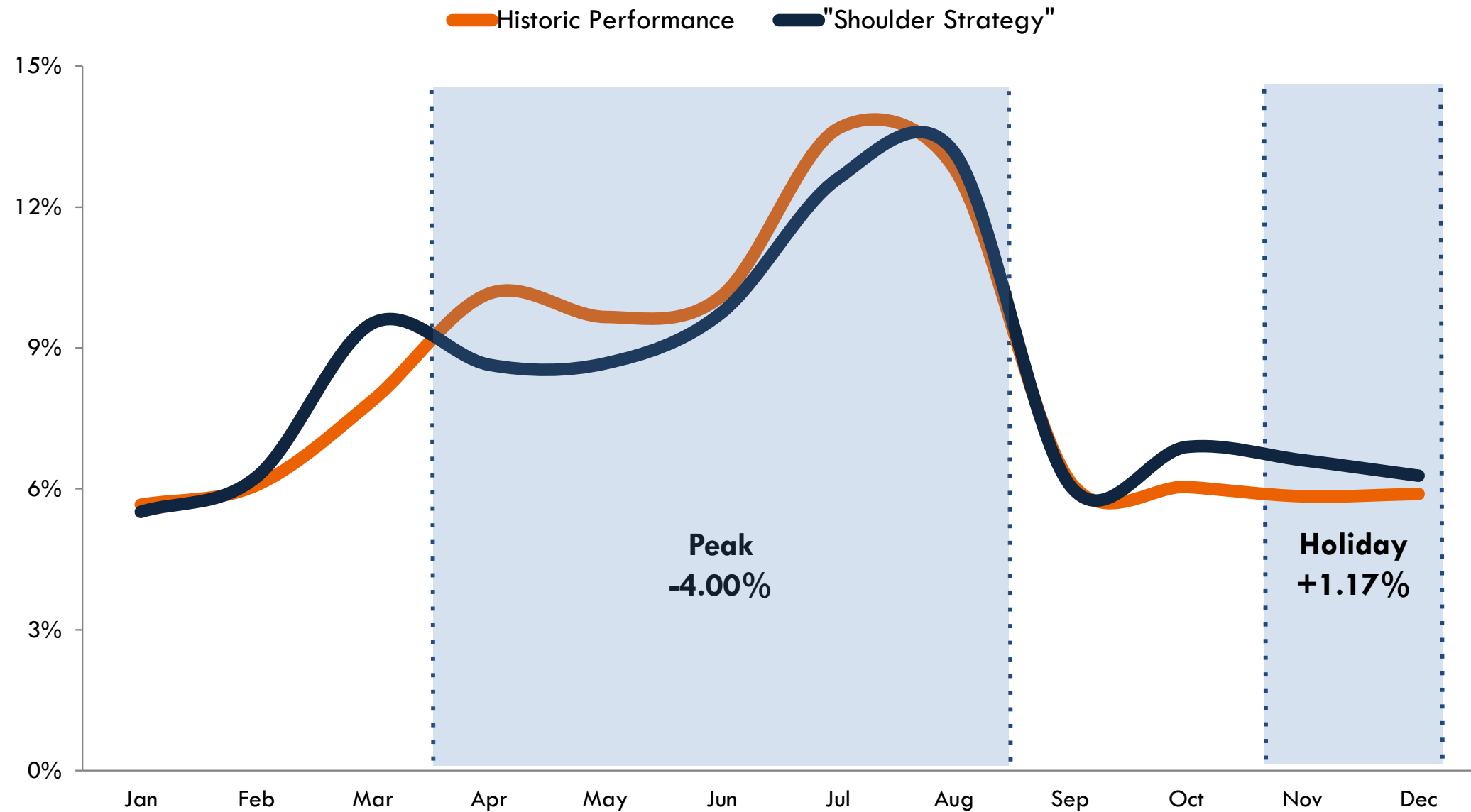
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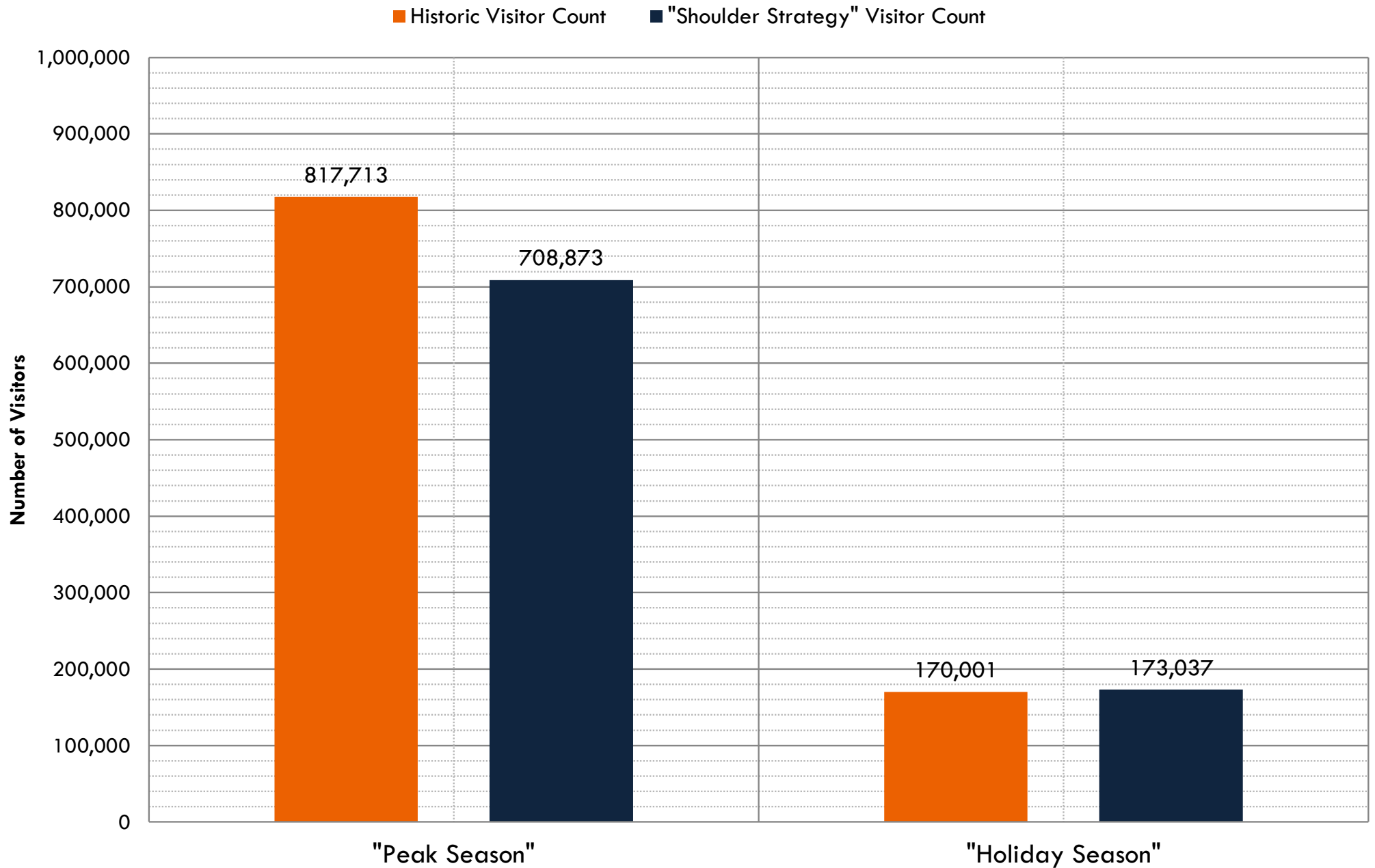
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Case Analysis: Attempt to Maximize Off-Peak Attendance for a Cultural Visitor-Serving Organization



Case Analysis: “Shoulder Strategy” Performance Analysis

Historic and “Shoulder Strategy” Attendance Comparison

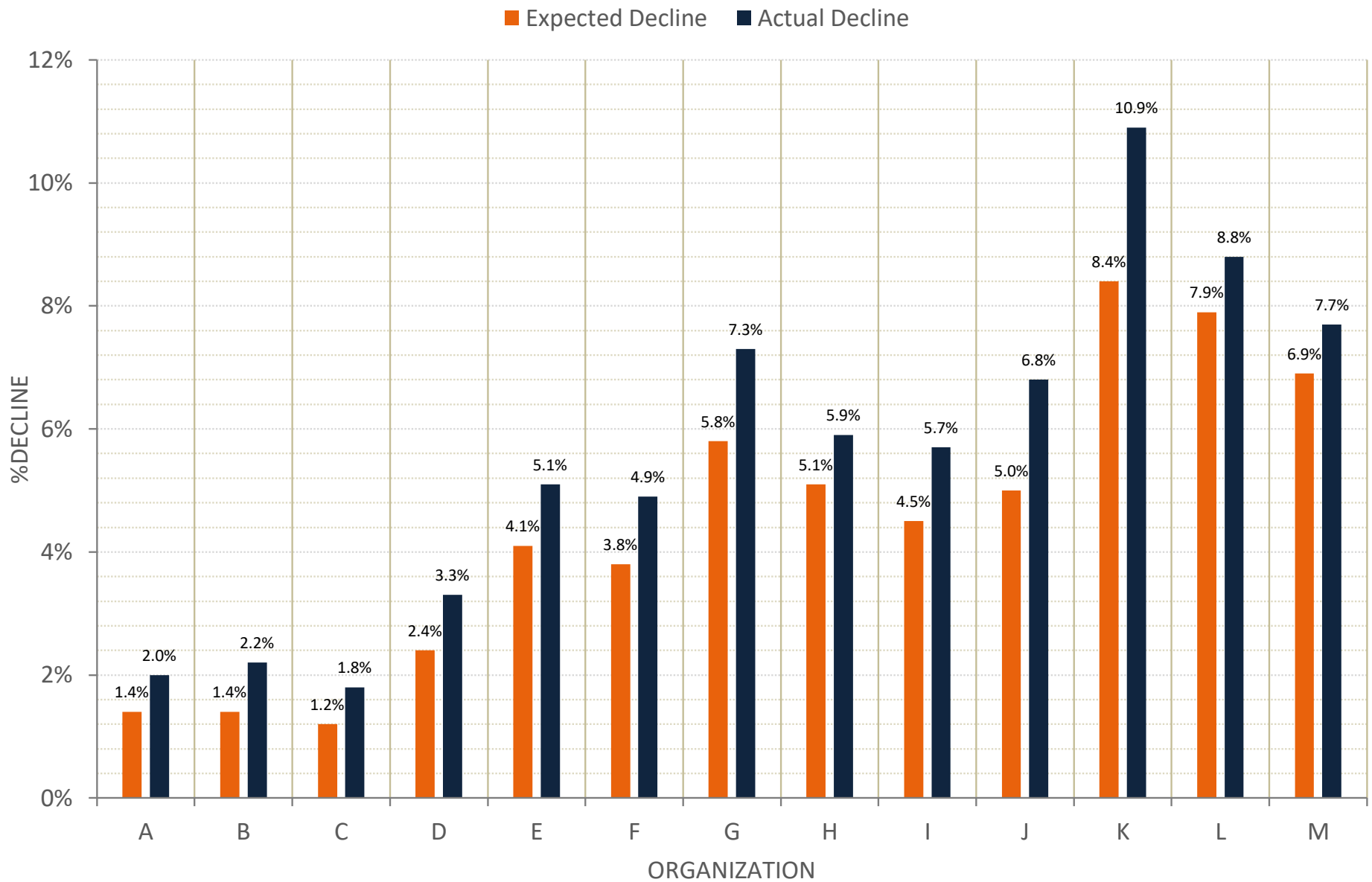


“Shoulder strategy” case study outcome

- Reinvested \$300,000 (10-12% marketing budget)
- Increased holiday season attendance by 1.17% (3,306 visitors)
- Decreased peak season attendance by 4% (108,840 visitors)
- Paid \$300,000 to lose 105,534 visitors

Visitor-Serving Cultural Organization Imitative Value Applied Analysis

(Three year average, 2013- 2015)



Reputation

What influences the decision-making process?

Discretionary decision-making utility model

US Composite

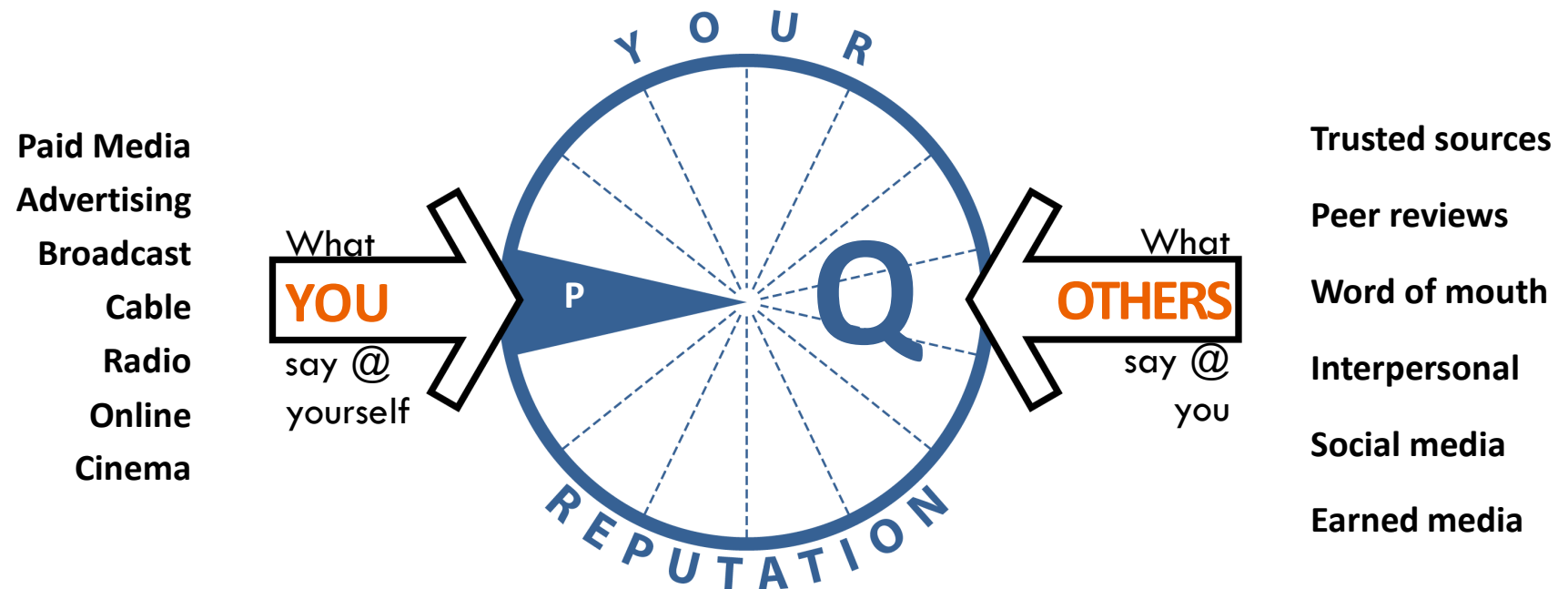
Utility	Index
Schedule	147.9
Cost	121.3
Travel distance (proximity)	120.5
Special events	118.8
Reputation	117.5
“Family-friendly”	116.4
Nightlife	110.0
Climate	107.7
“Friends and family”	105.3
Safety	102.6
Specific activity/attraction	101.9
Ease of access	100.2

High-Propensity Visitors

Utility	Index
Schedule	203.5
Reputation	181.2
Travel distance (proximity)	129.5
Ease of access	120.4
Planning convenience	116.3
Climate	112.9
Special events	108.0
Specific activity/attraction	107.8
Travel loyalty programs	105.6
Nightlife	103.3
Fine dining	102.7
Cost	100.4

Reputation

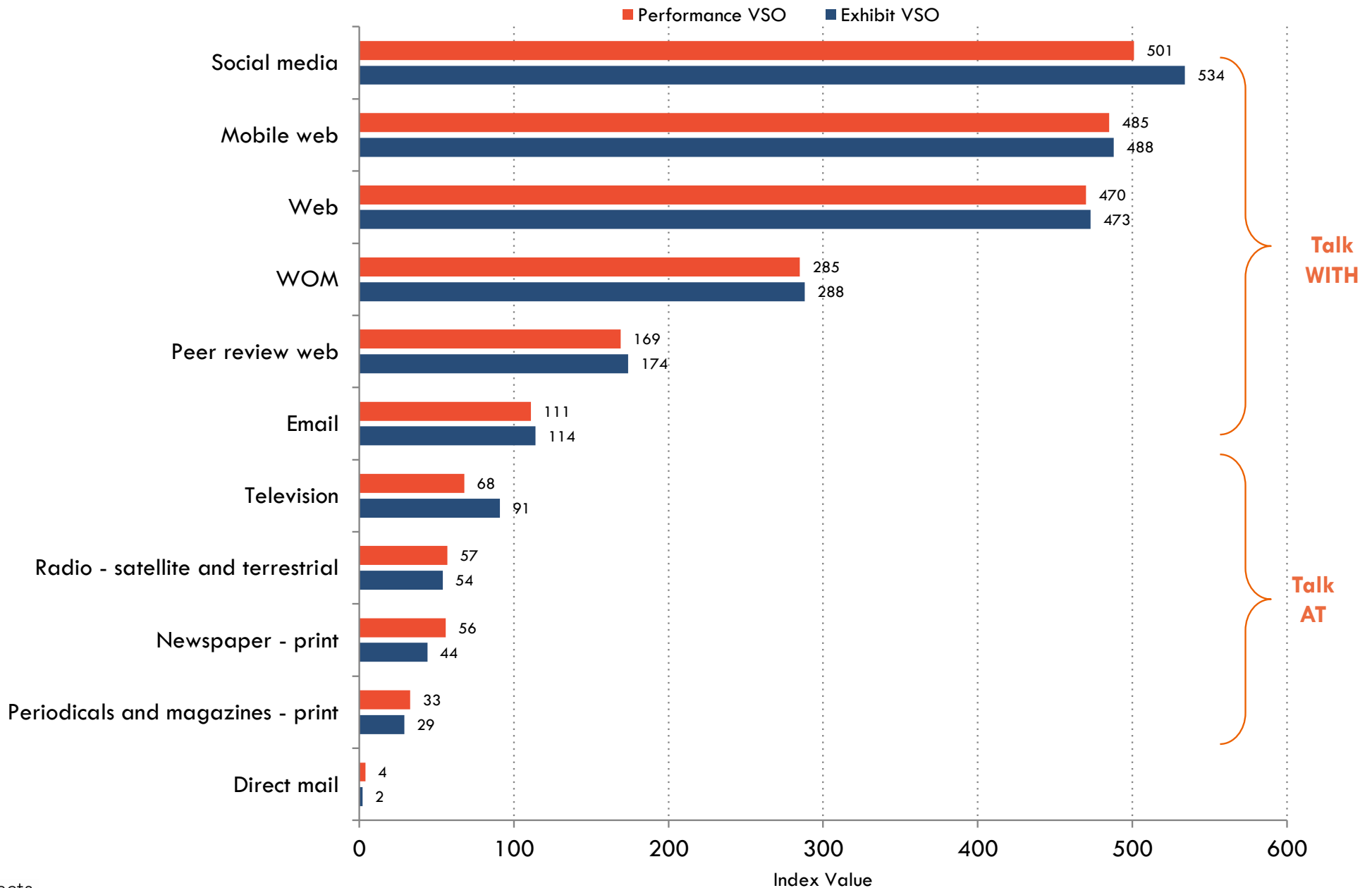
Reputation plays a role in driving **success**



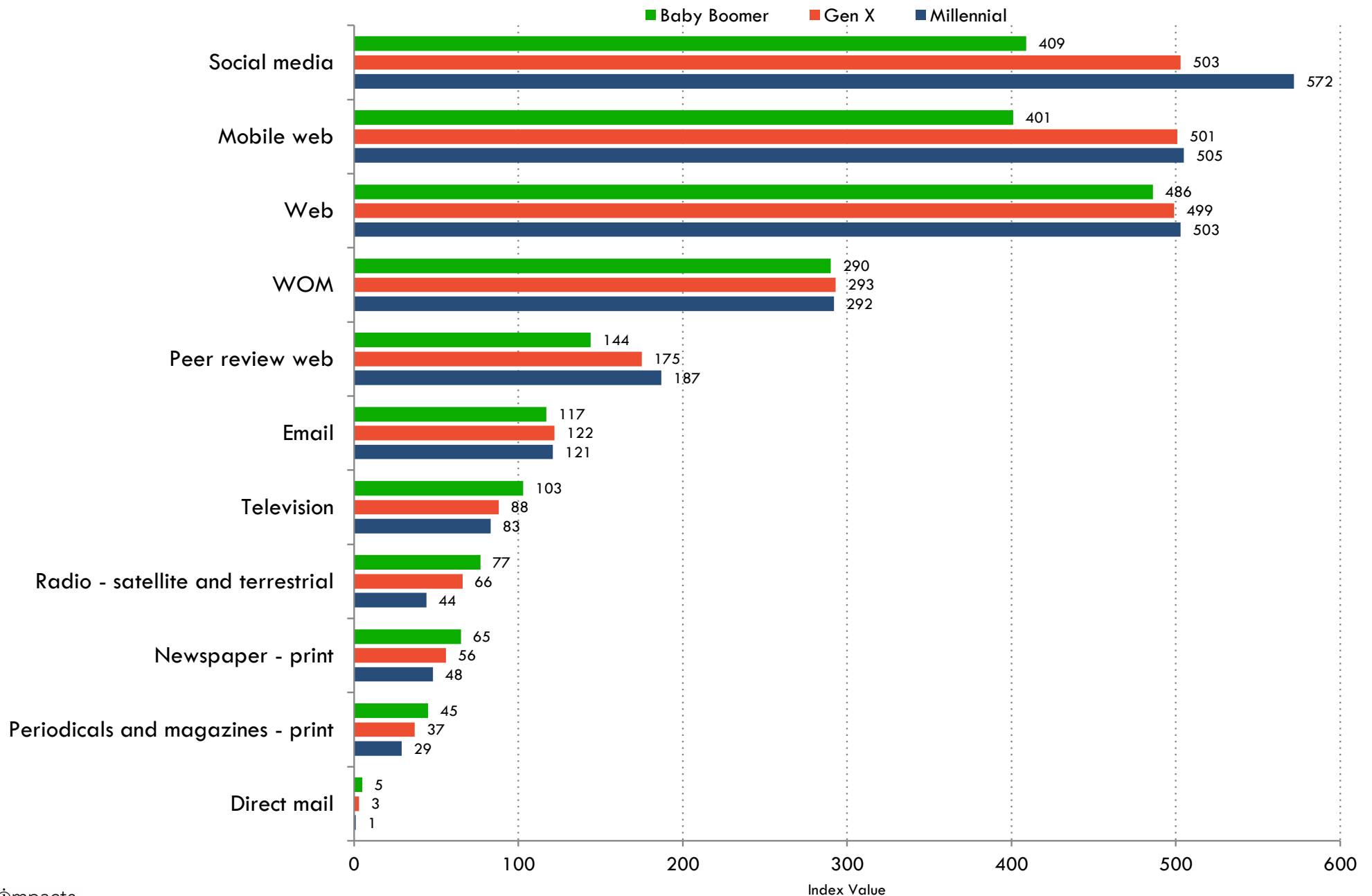
Q (the coefficient of imitation) has a value **12.85x** greater than that of
P (the coefficient of innovation)

Sources of information for high-propensity visitors

DMA (Atlanta, GA MSA + Columbus, GA)



Sources of information for high-propensity visitors



Transparency

Social mission

Self-curation

Authenticity

Real-time

Personalization

Integrity

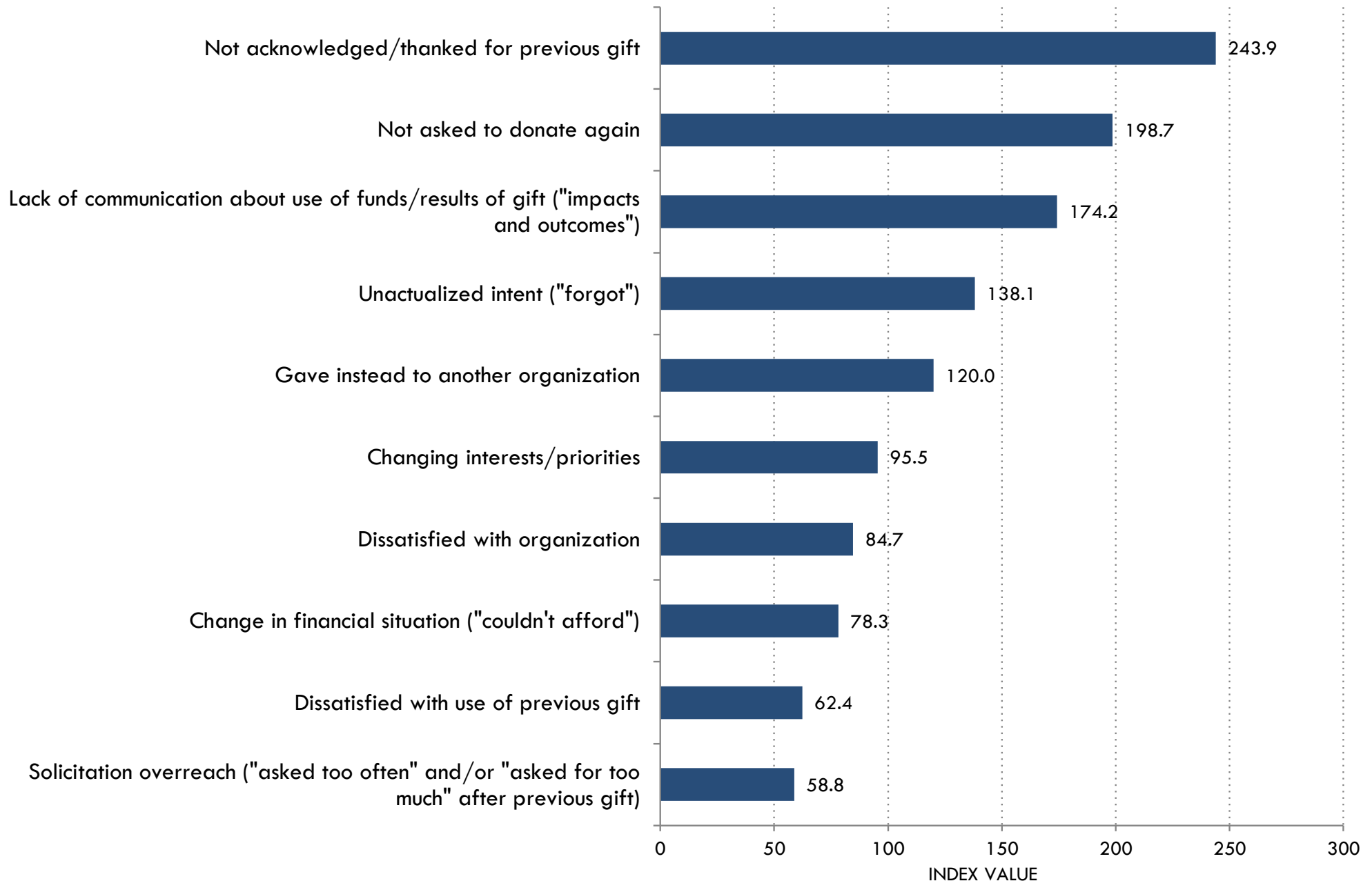
Connection

Show vs. Tell



Why did you not make a donation?

(Previous \$250-\$2,500 annual donors who had did not donate again within 24 months)

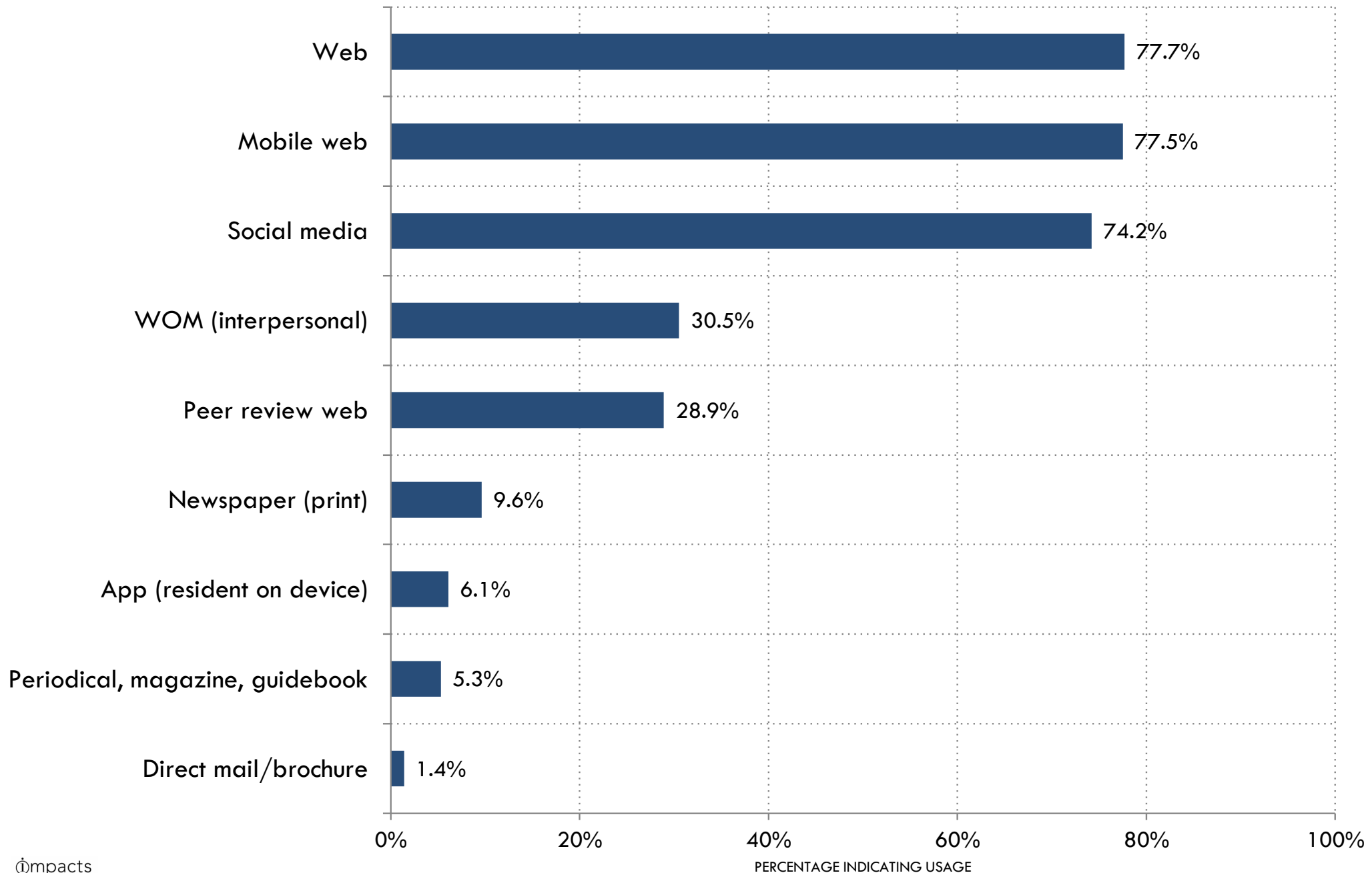


(Digital) connection does not “belong” to marketing

- Impacts engagement of high-propensity visitors
(marketing, operations)
- Impacts engagement of members and donors
(development, membership, subscribers)
- Impacts engagement of income-qualified audiences
(outreach, access programs)

Pre-visit usage of information source

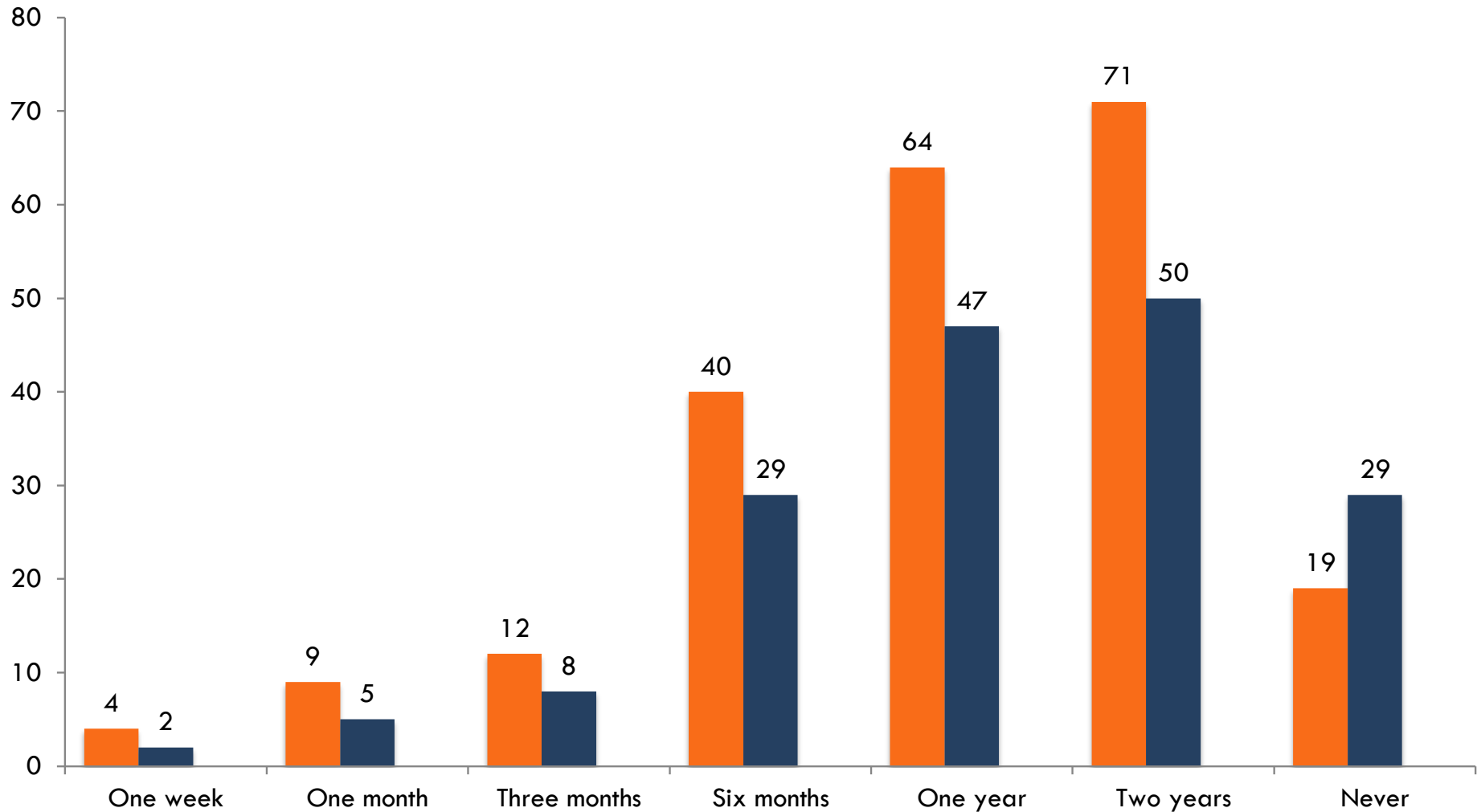
By channel/platform for visits within the past 12 months (Q1 2019)



Intent to Visit

Intent by Chronology of Next Intended Visit by Social Media Use
104 visitor-serving organizations

EOY 2018 SM EOY 2018

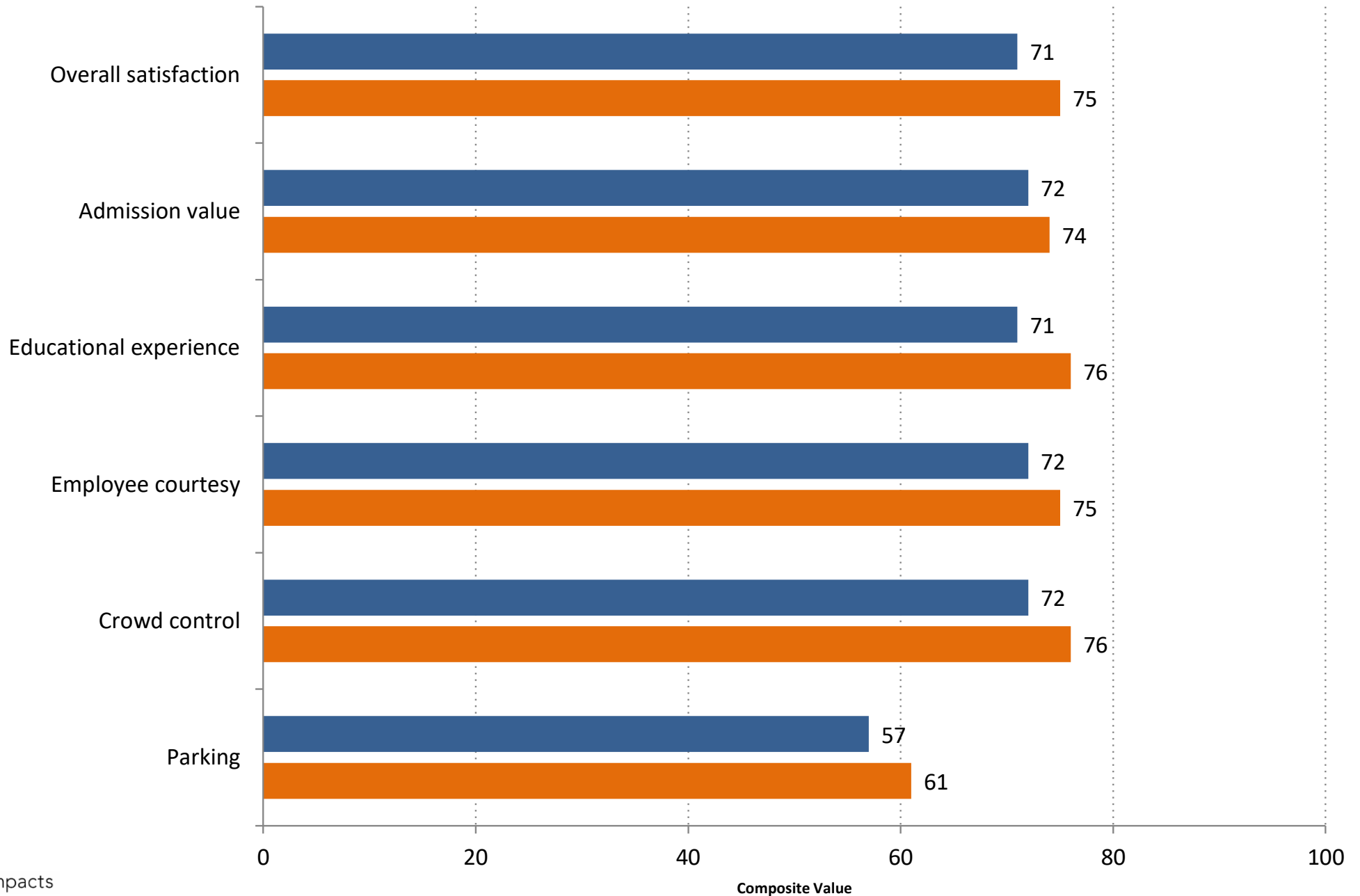


Intended Time to Next Visit

Social media influence on visitor experience

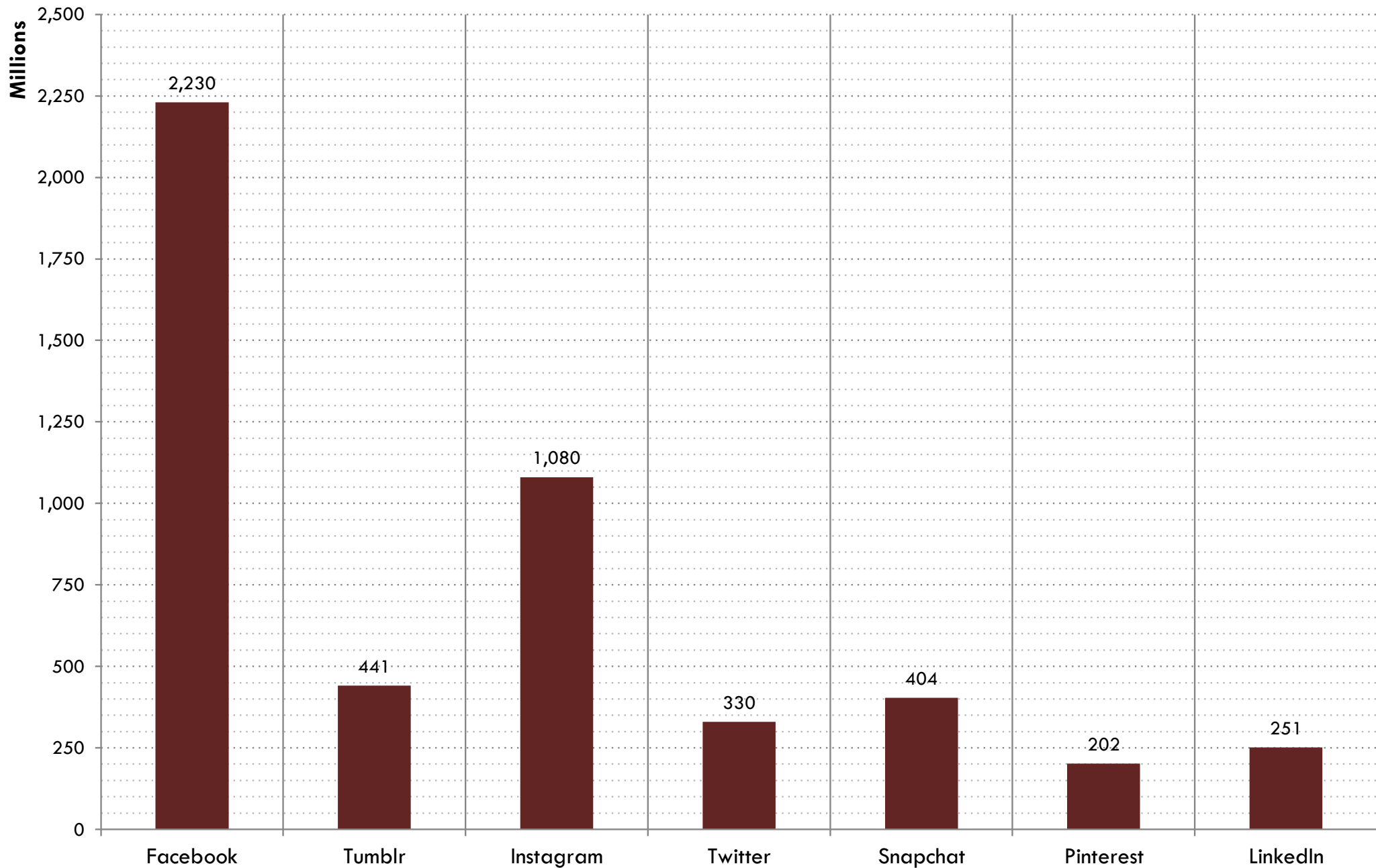
74 visitor-serving organizations

■ EOY 18 Non-SM ■ EOY 18 SM



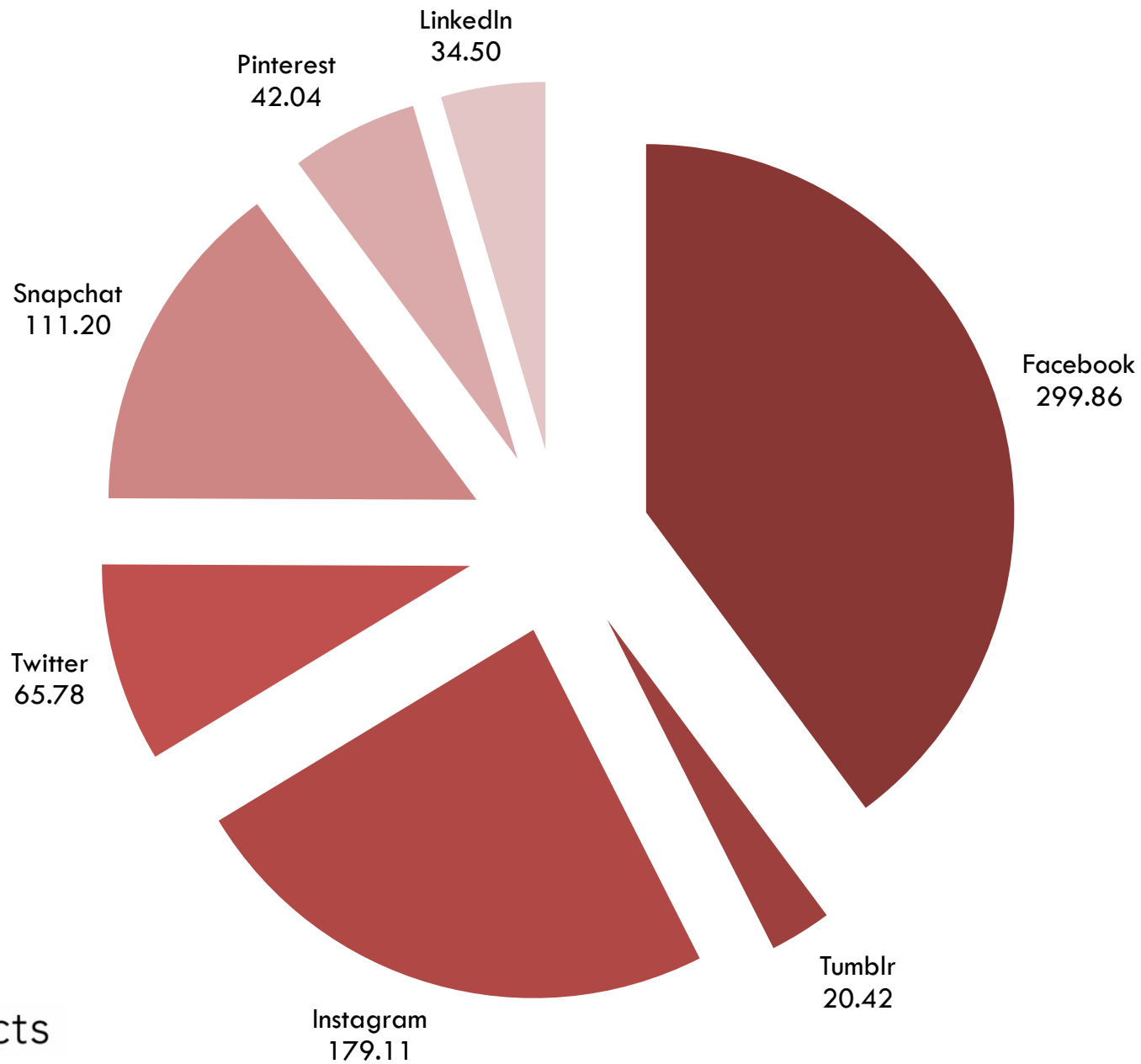
Social media usage

Worldwide monthly users by platform (June 2018)



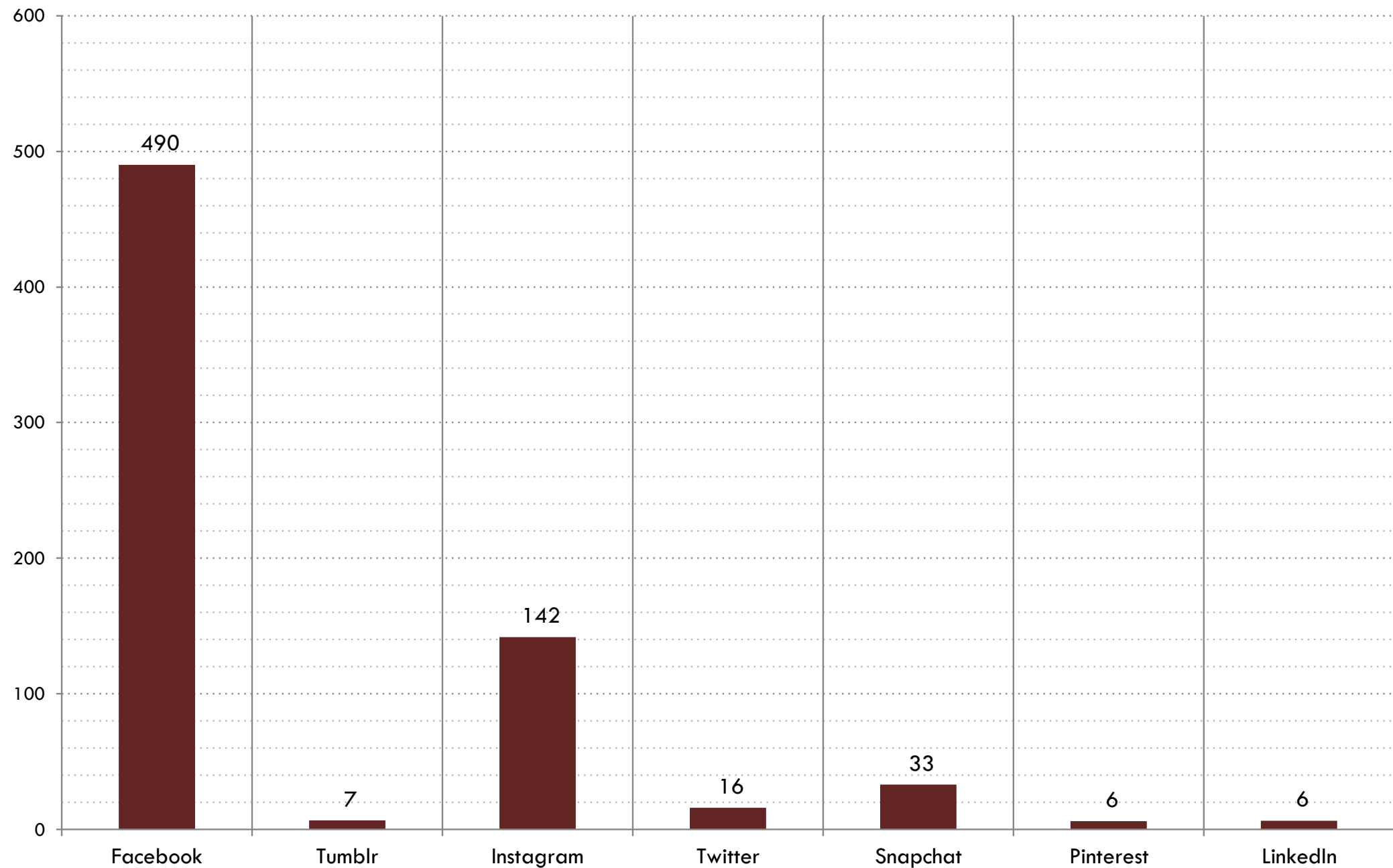
Relative social media timeshare

By platform (October 2018)



Relative social media “power”

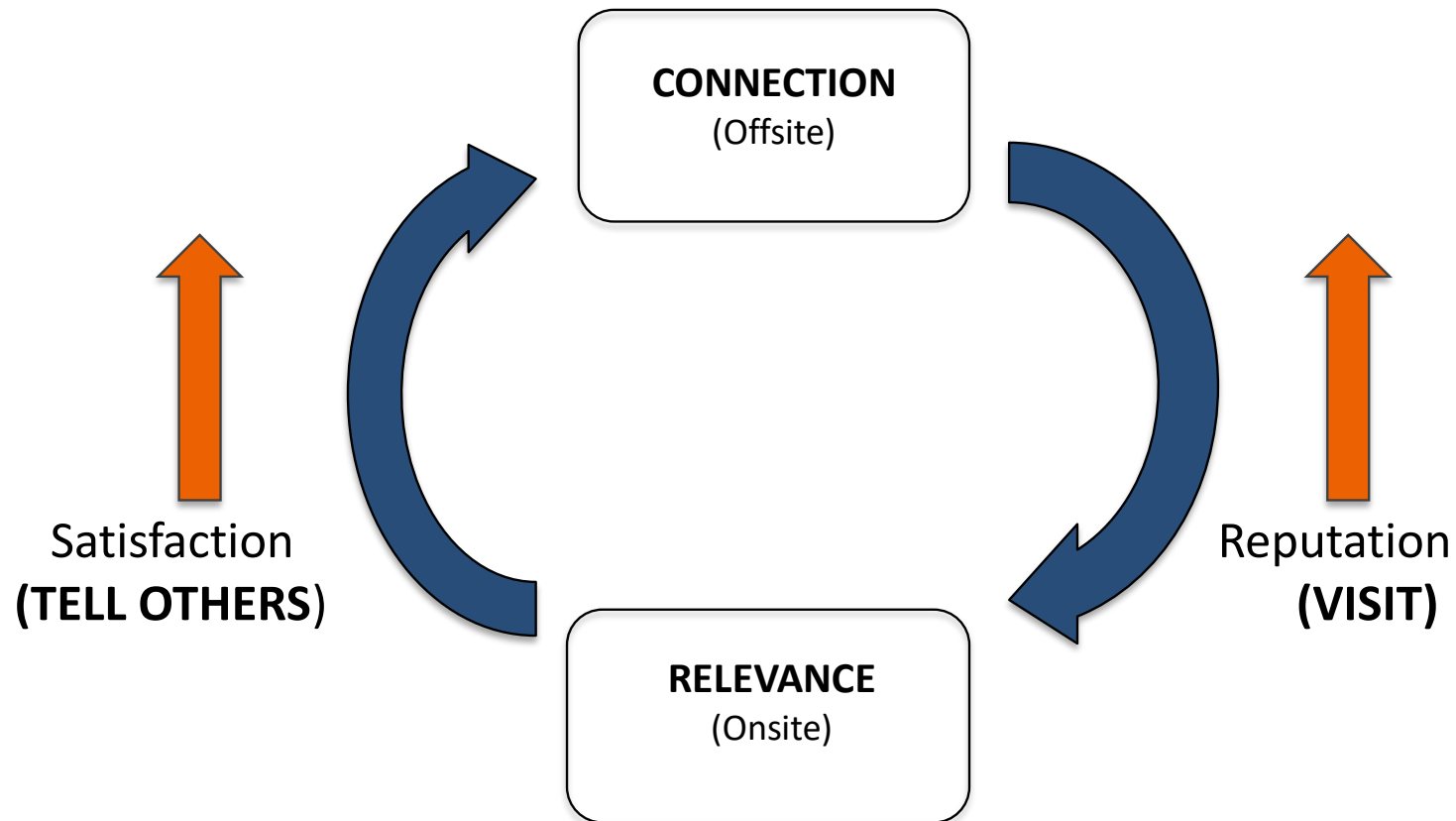
Product of usage and share, Indexed by platform (October 2018)



Satisfaction

The Visitor Engagement Cycle

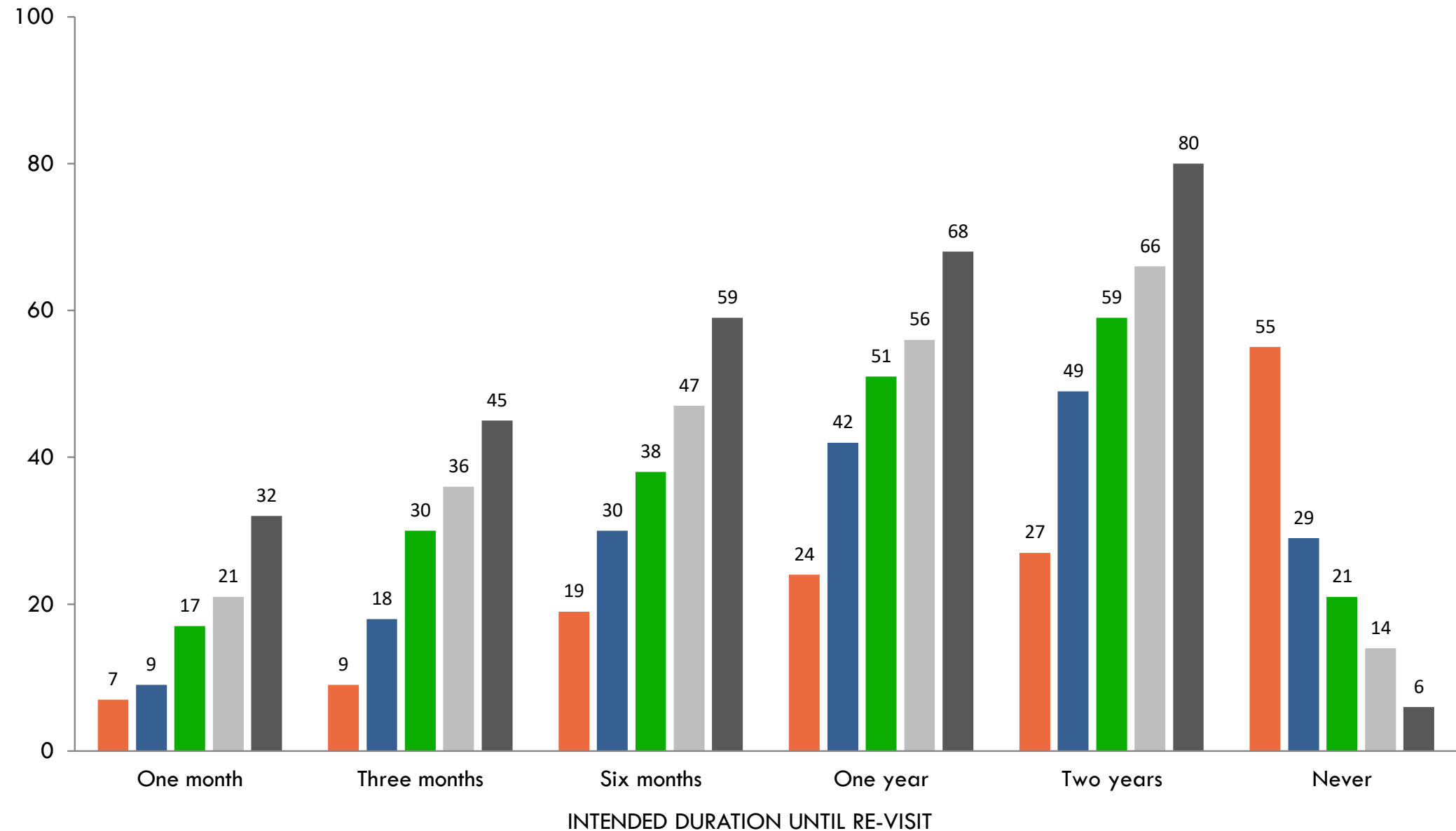
Building affinity and securing visitation



Intent to re-visit by overall satisfaction

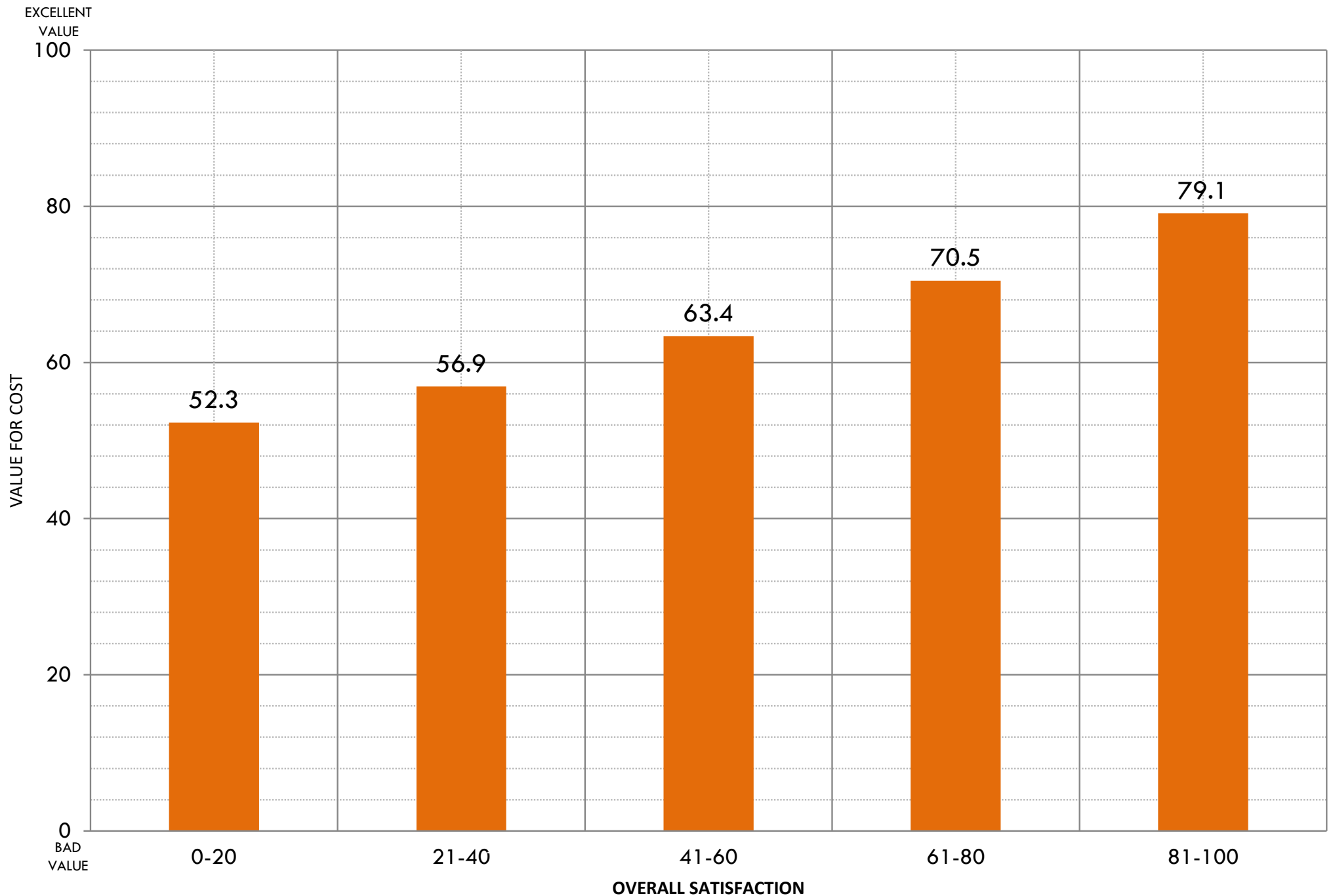
(Duration until anticipated return visit by overall satisfaction)

0-39 40-59 60-69 70-79 80+

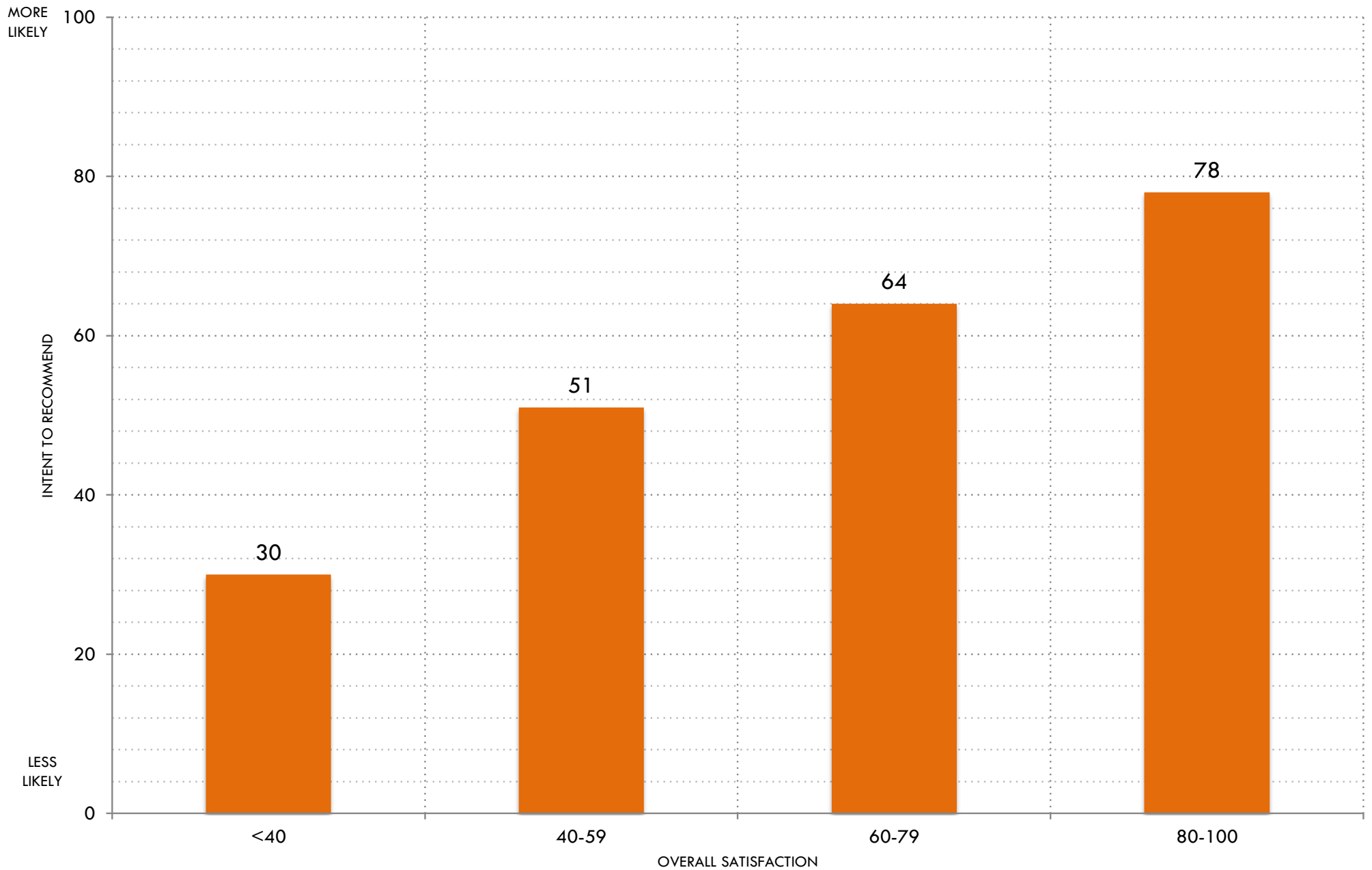


Value for cost by overall satisfaction

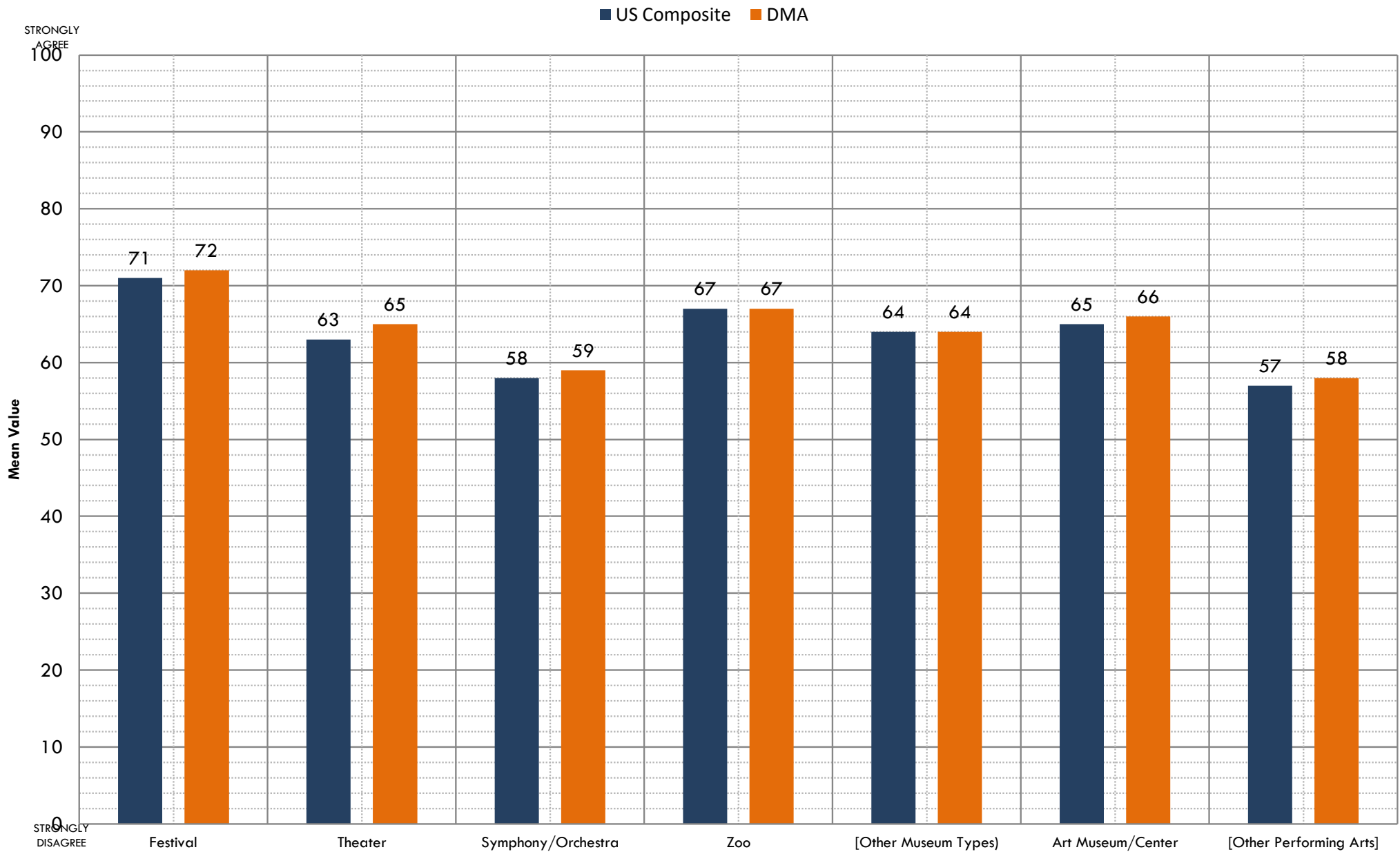
Year 2017, US visitor-serving organizations



Intent to Recommend by Overall Satisfaction

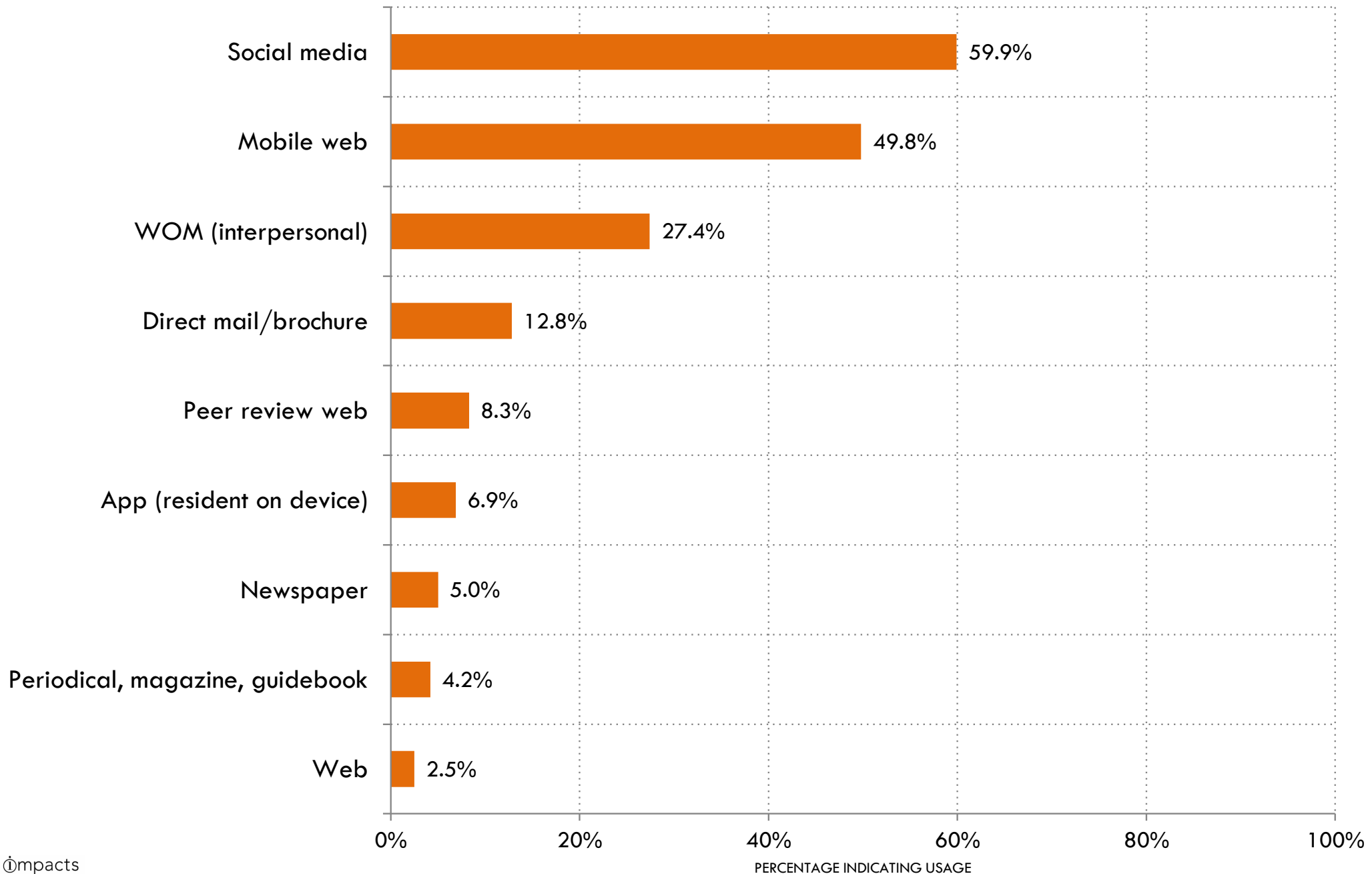


I am satisfied with my experience when I visit a(n) ...



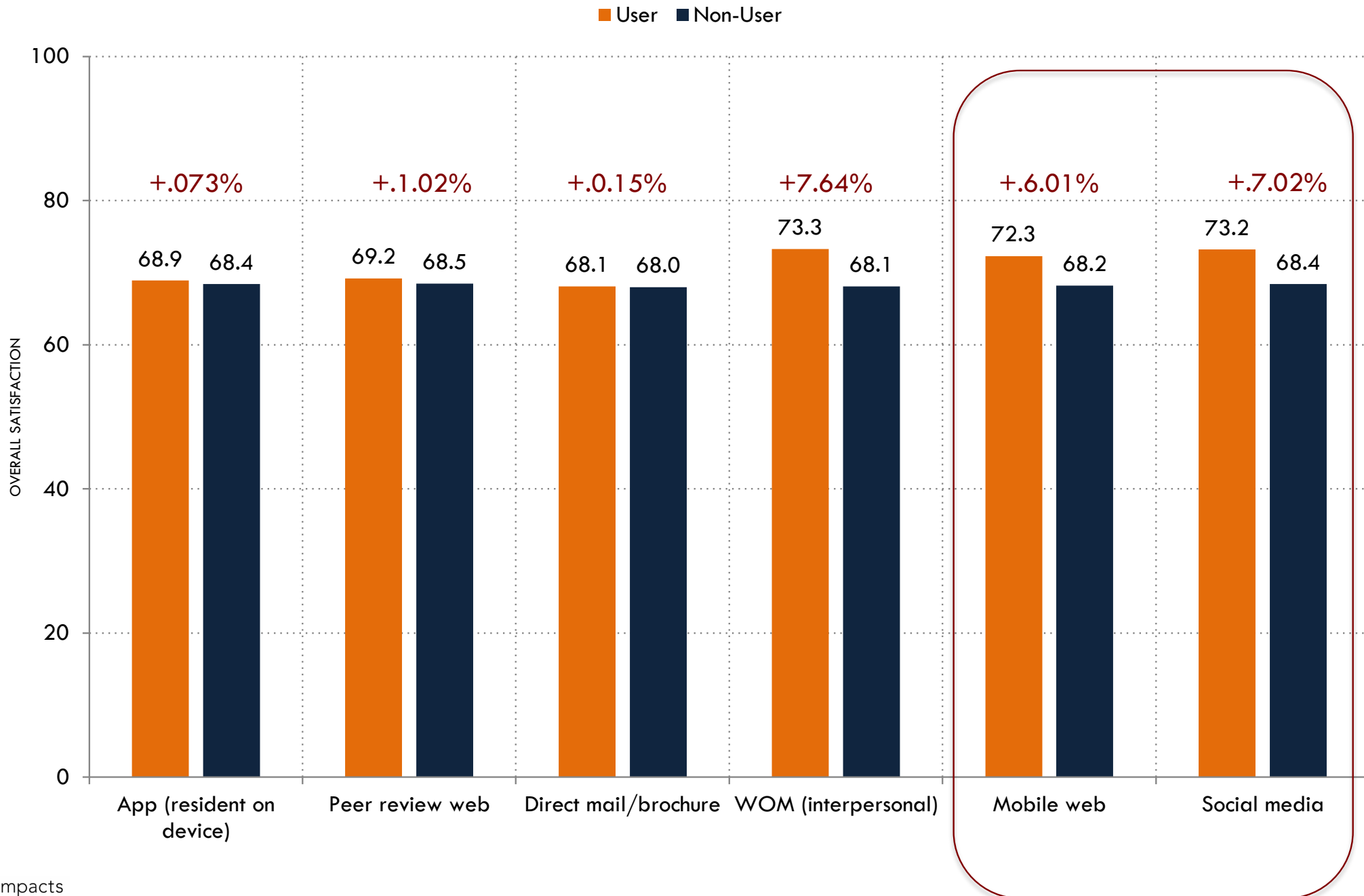
Onsite usage of information source

By channel/platform during visits within the past 12 months (Q1 2019)



Satisfaction by onsite usage of information source

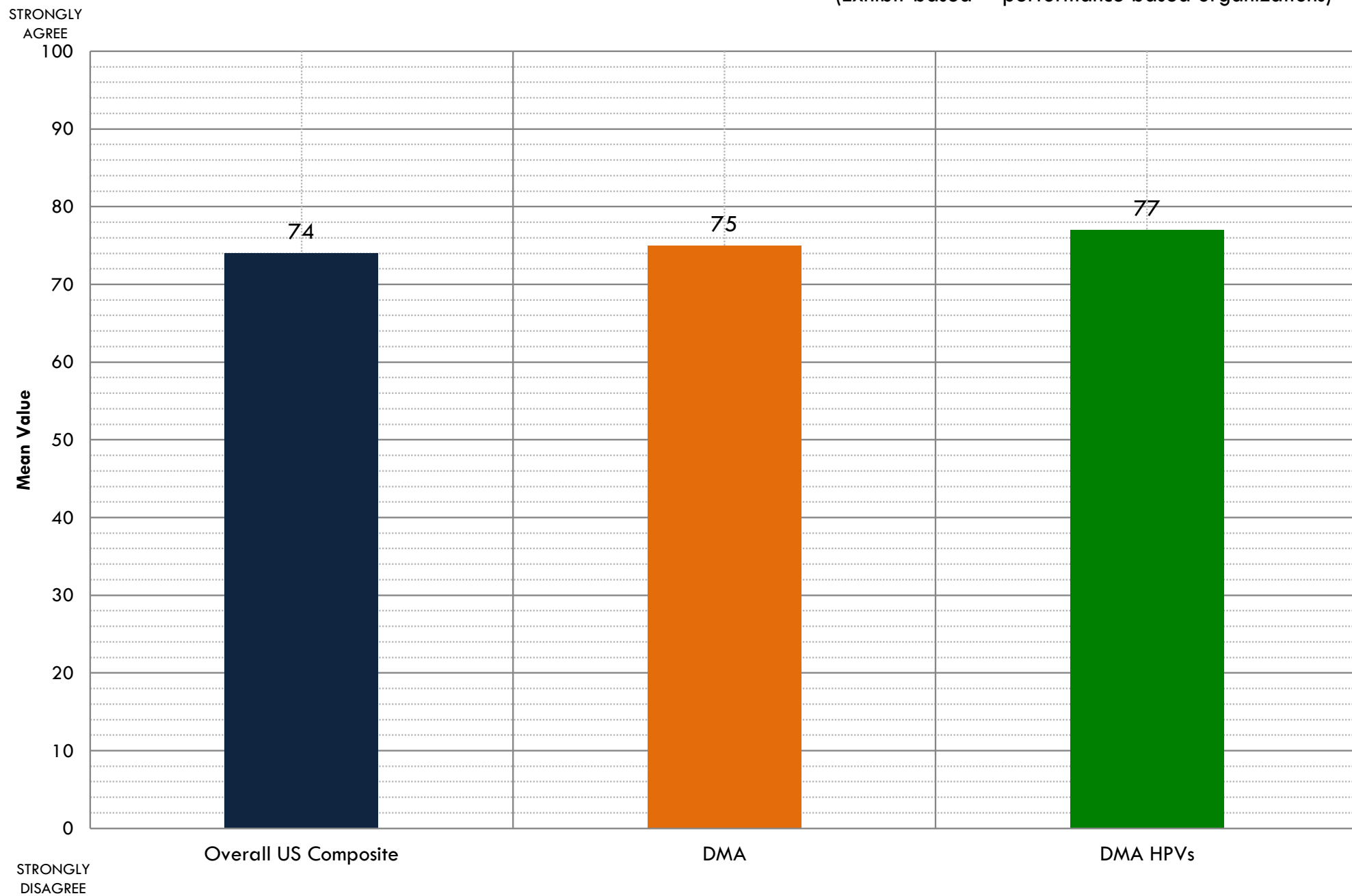
By channel/platform during visits within the past 12 months (Q1 2019)



EVALUATION CRITERIA	WEIGHT	%
Entertainment experience	0.2083827	20.84%
Favorability	0.1973655	19.74%
Admission value	0.1392858	13.93%
Employee courtesy	0.1058746	10.59%
Cleanliness	0.0839291	8.39%
Crowd control	0.0693879	6.94%
Parking	0.0685503	6.86%
Food service	0.0483722	4.84%
Educational experience	0.0476664	4.77%
Retail	0.0311855	3.12%
OVERALL SATISFACTION (COMPOSITE)	1.0000000	100.00%

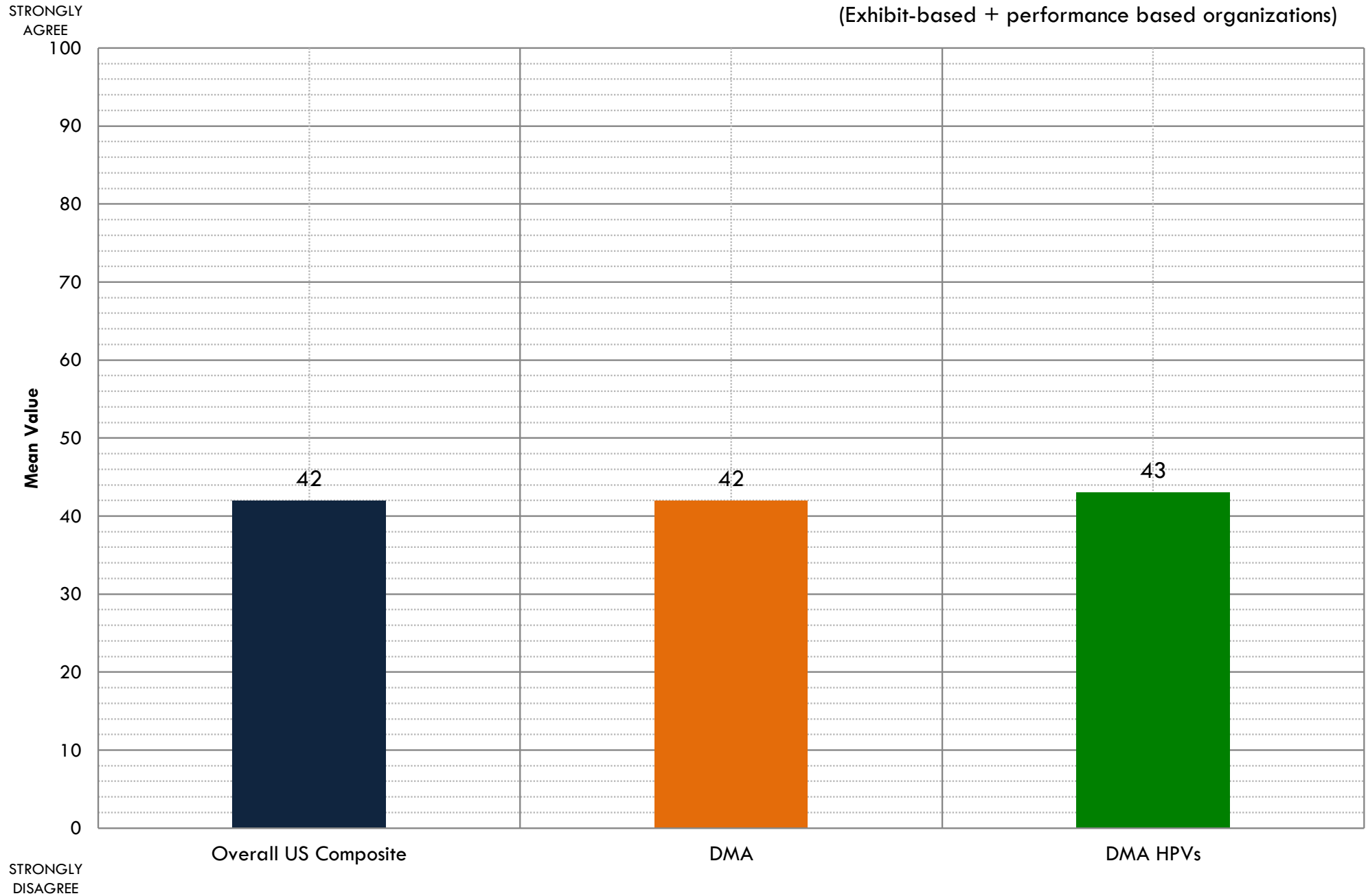
I primarily visit cultural organizations to be entertained.

(Exhibit-based + performance based organizations)



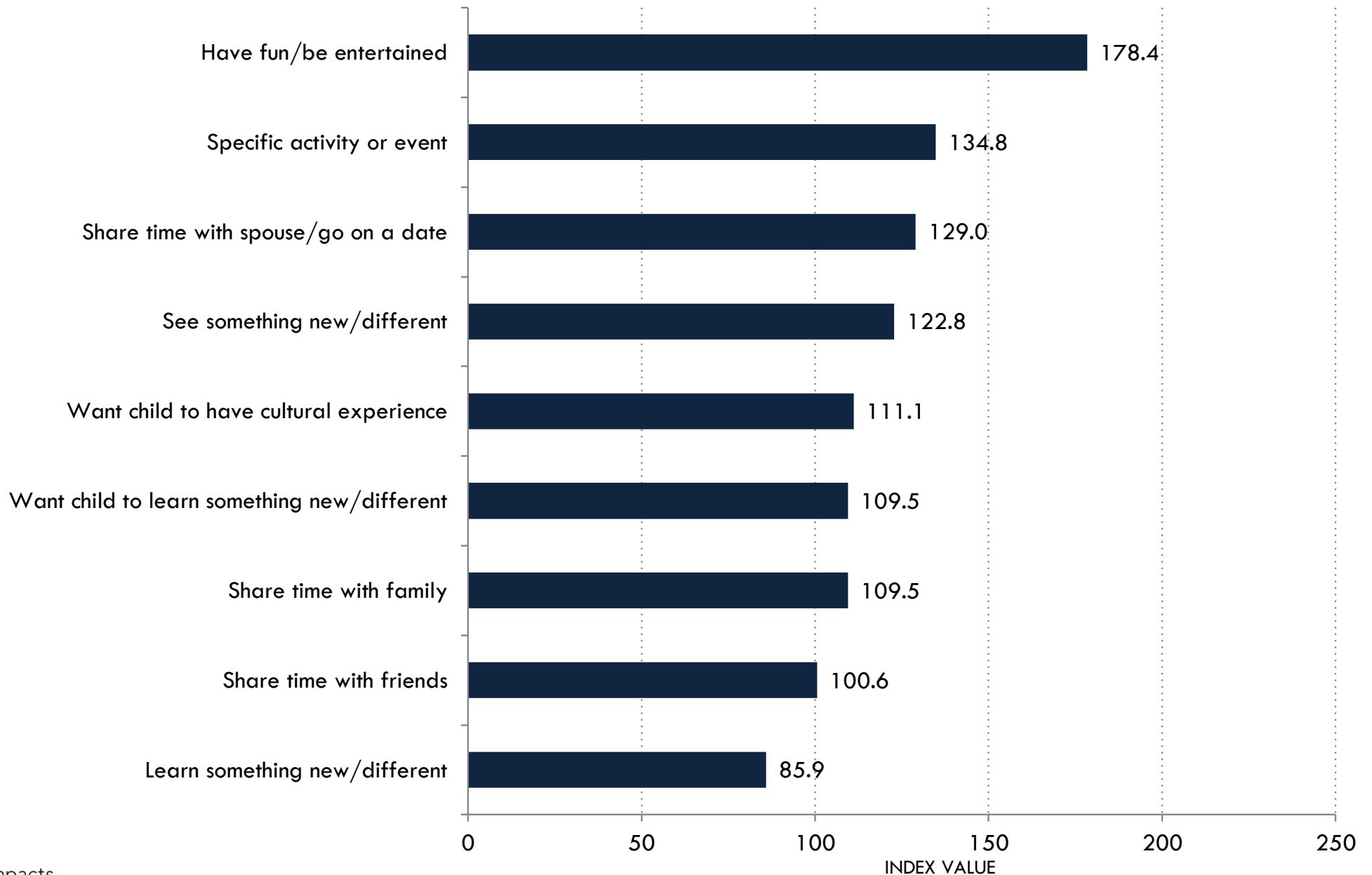
I primarily visit cultural organizations to learn and/or be educated.

(Exhibit-based + performance based organizations)



What was the primary purpose of your visit to the ... ?

(US performing arts organizations)

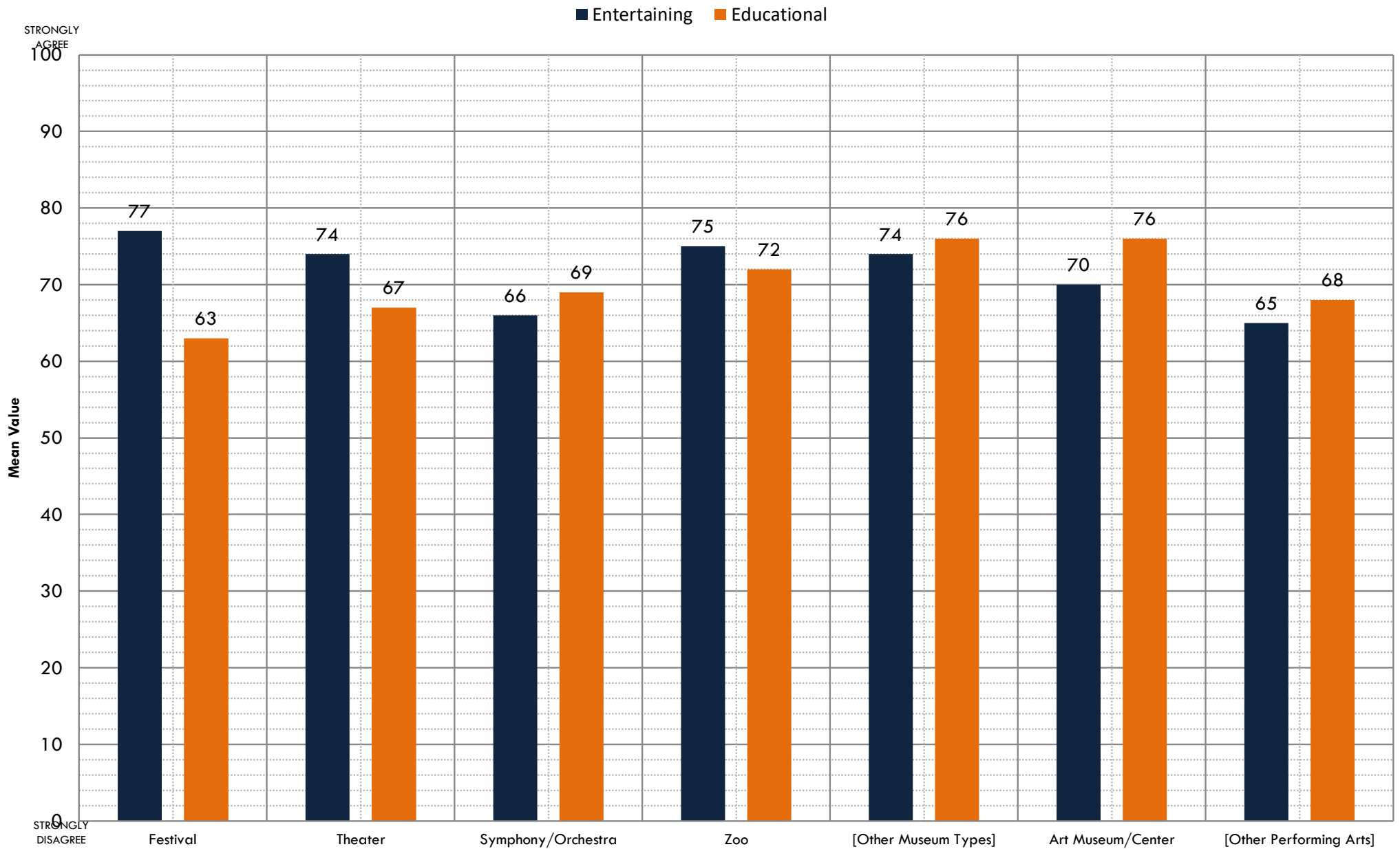


Entertainment?

It doesn't mean "necessarily vapid" or "necessarily joyful." It can mean "relevant." It can mean "connective." After all, we don't only watch comedies to be entertained. We also watch dramas, tear-jerkers, and documentaries.

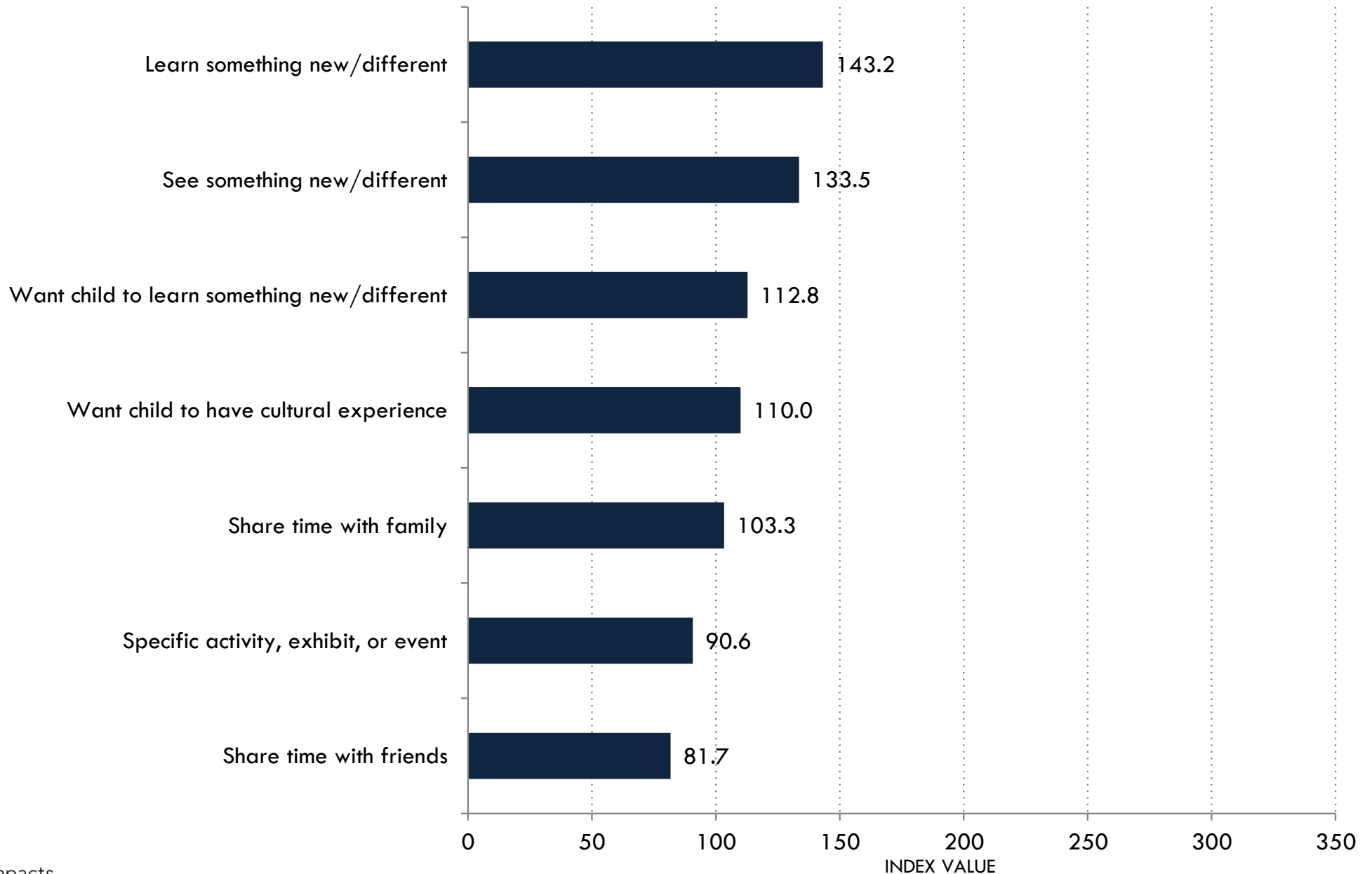
Visiting a(n) [organization type] is ...

DMA (Atlanta, GA MSA + Columbus, GA)

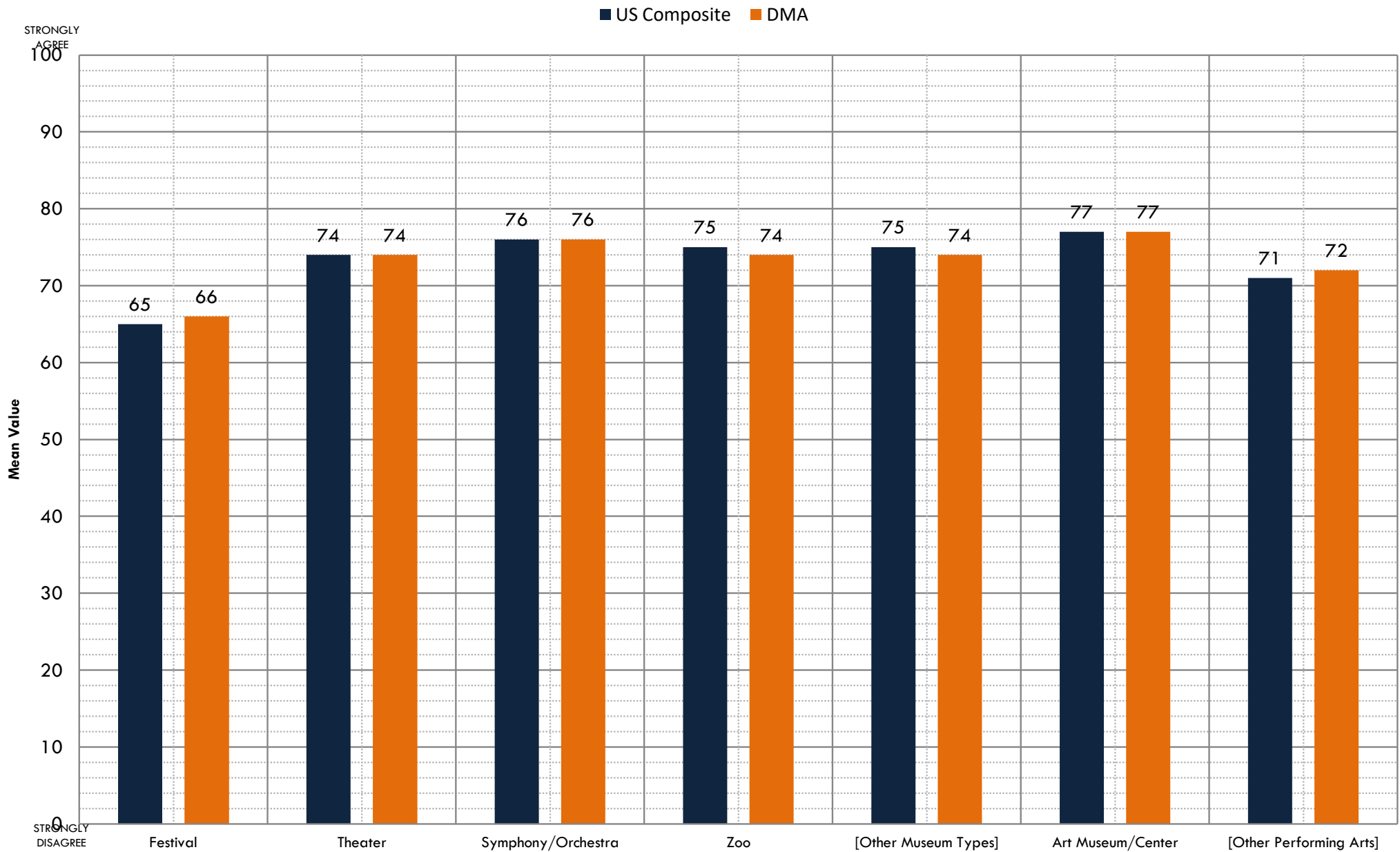


What was the primary purpose of your visit to the ... ?

(US exhibit-based cultural organizations)

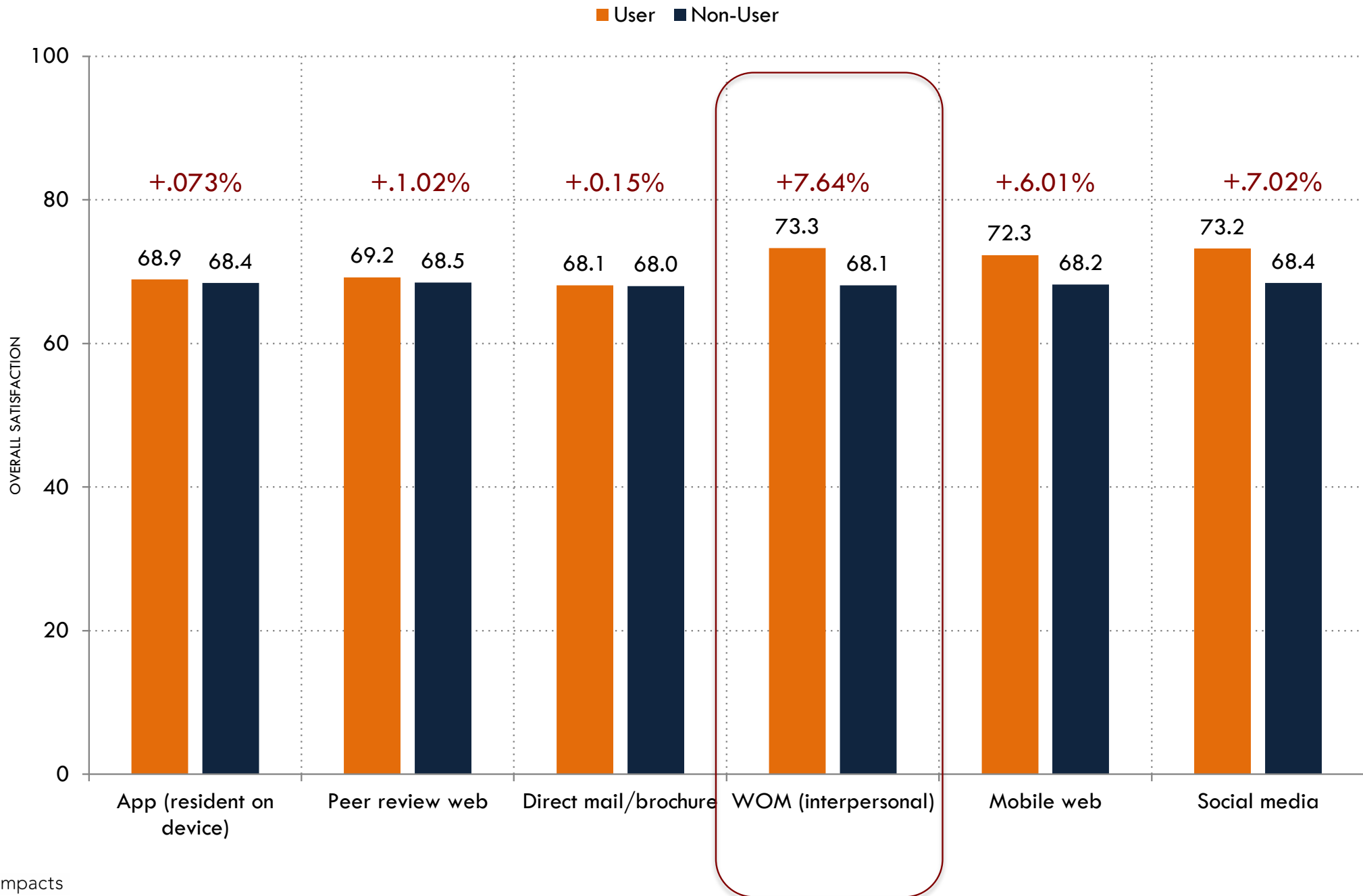


Taking a young child to visit a ... gives the child an “edge” or “advantage” in their academic or intellectual development.



Satisfaction by onsite usage of information source

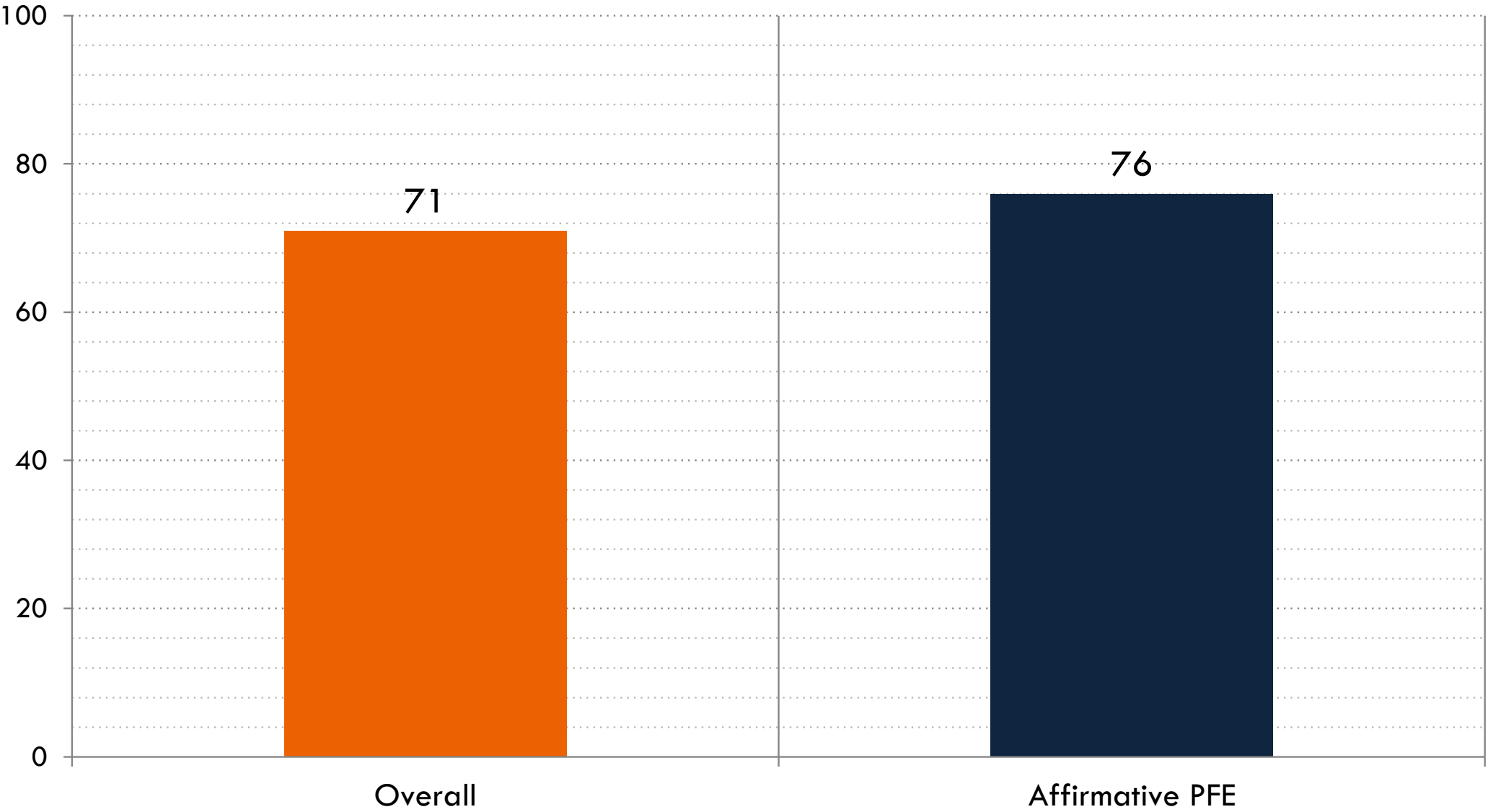
By channel/platform during visits within the past 12 months (Q1 2019)



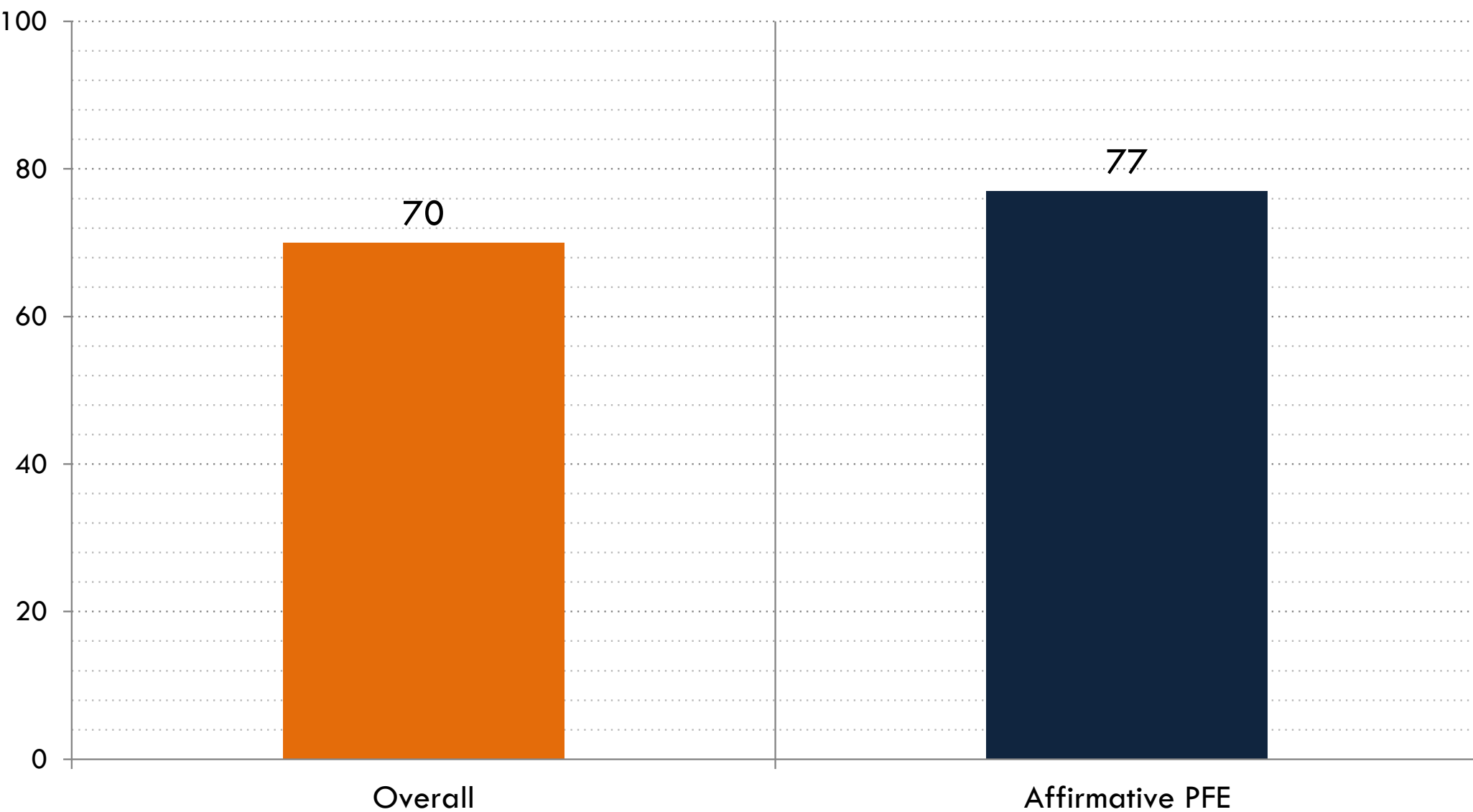
Personal Facilitated Experiences (PFE)

A PFE is a one-to-one or one-to-few interaction between a **staff member or volunteer** and an **individual, couple, or small family**.

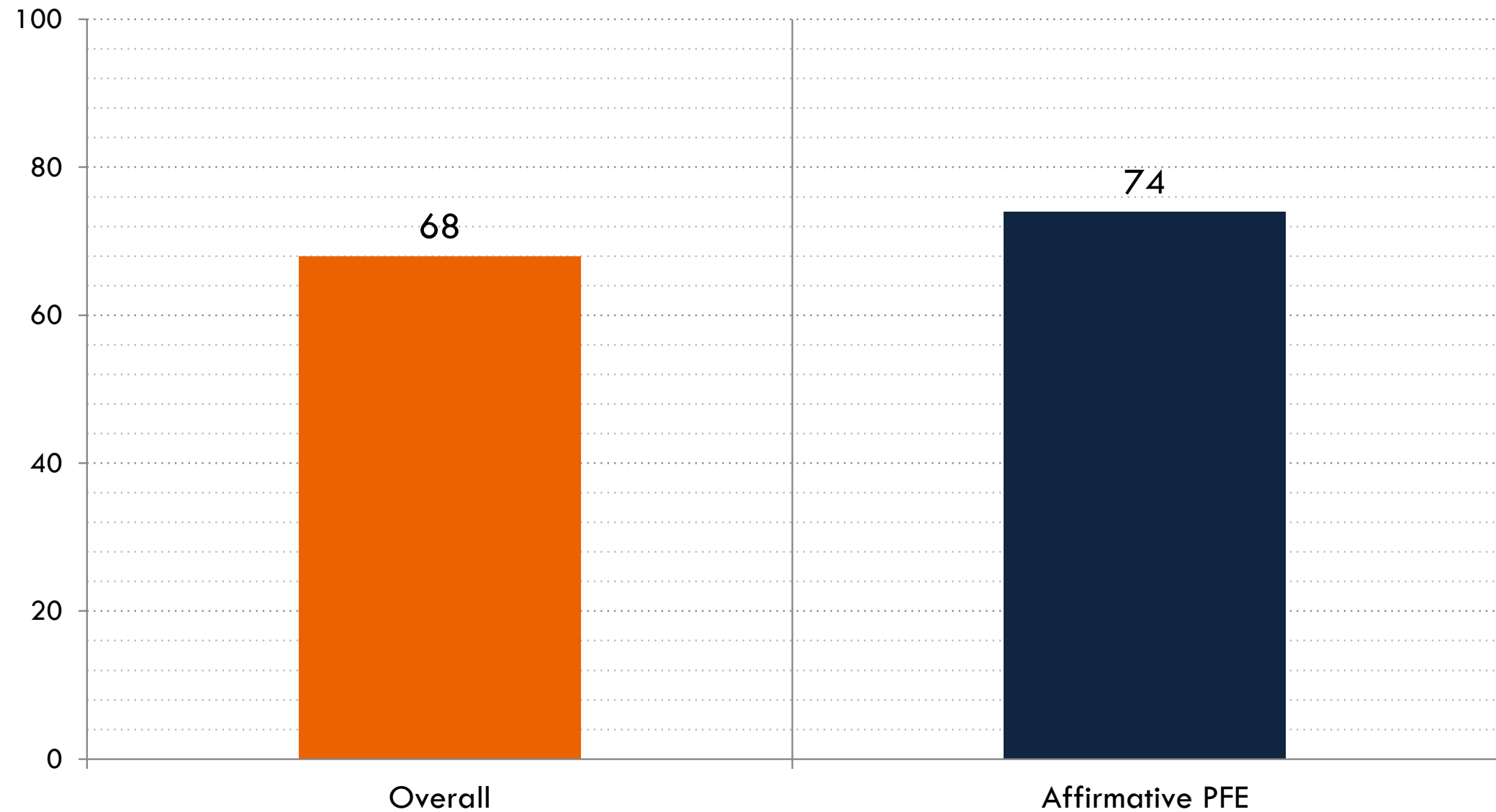
Employee courtesy



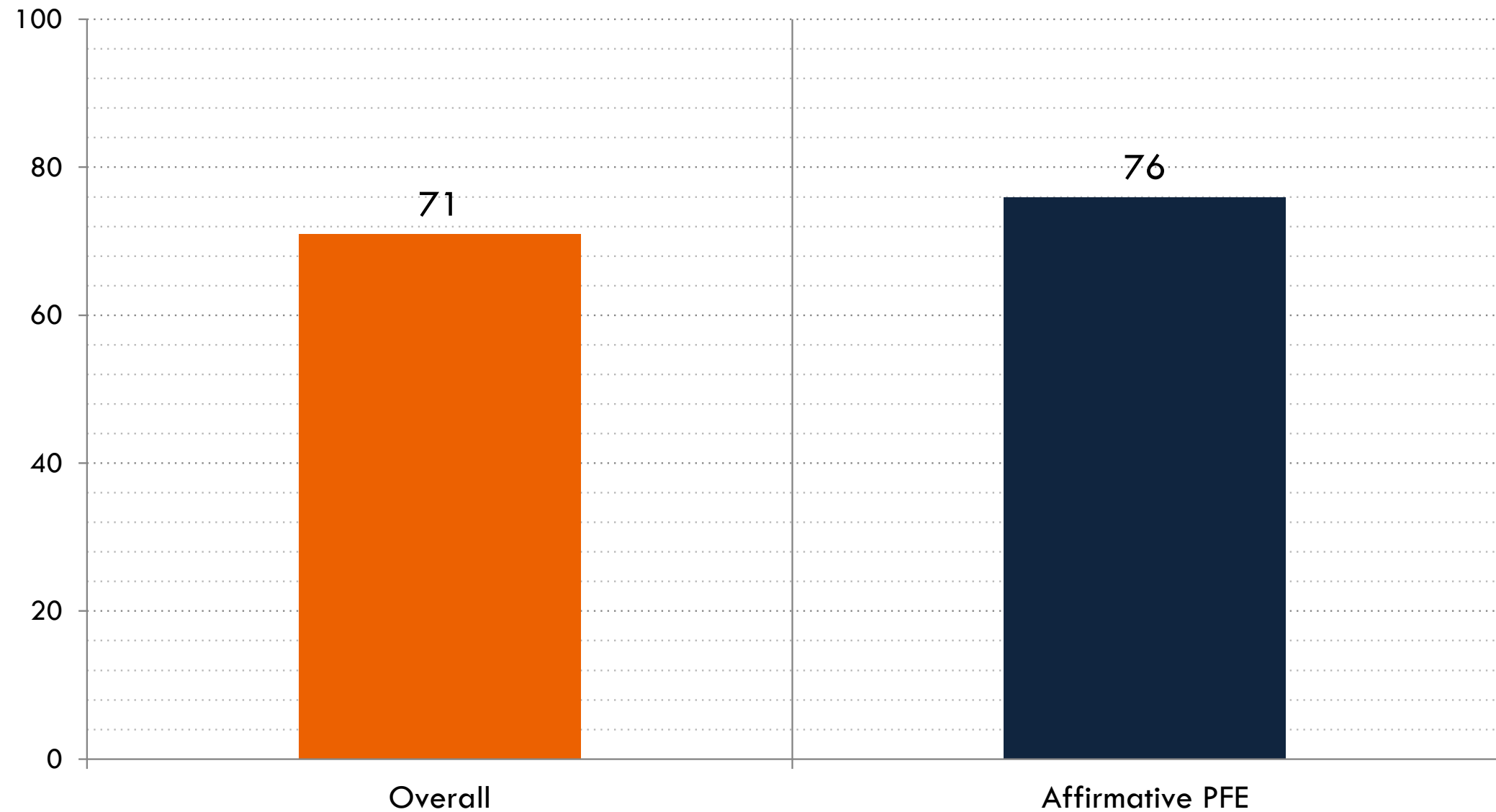
Admission value



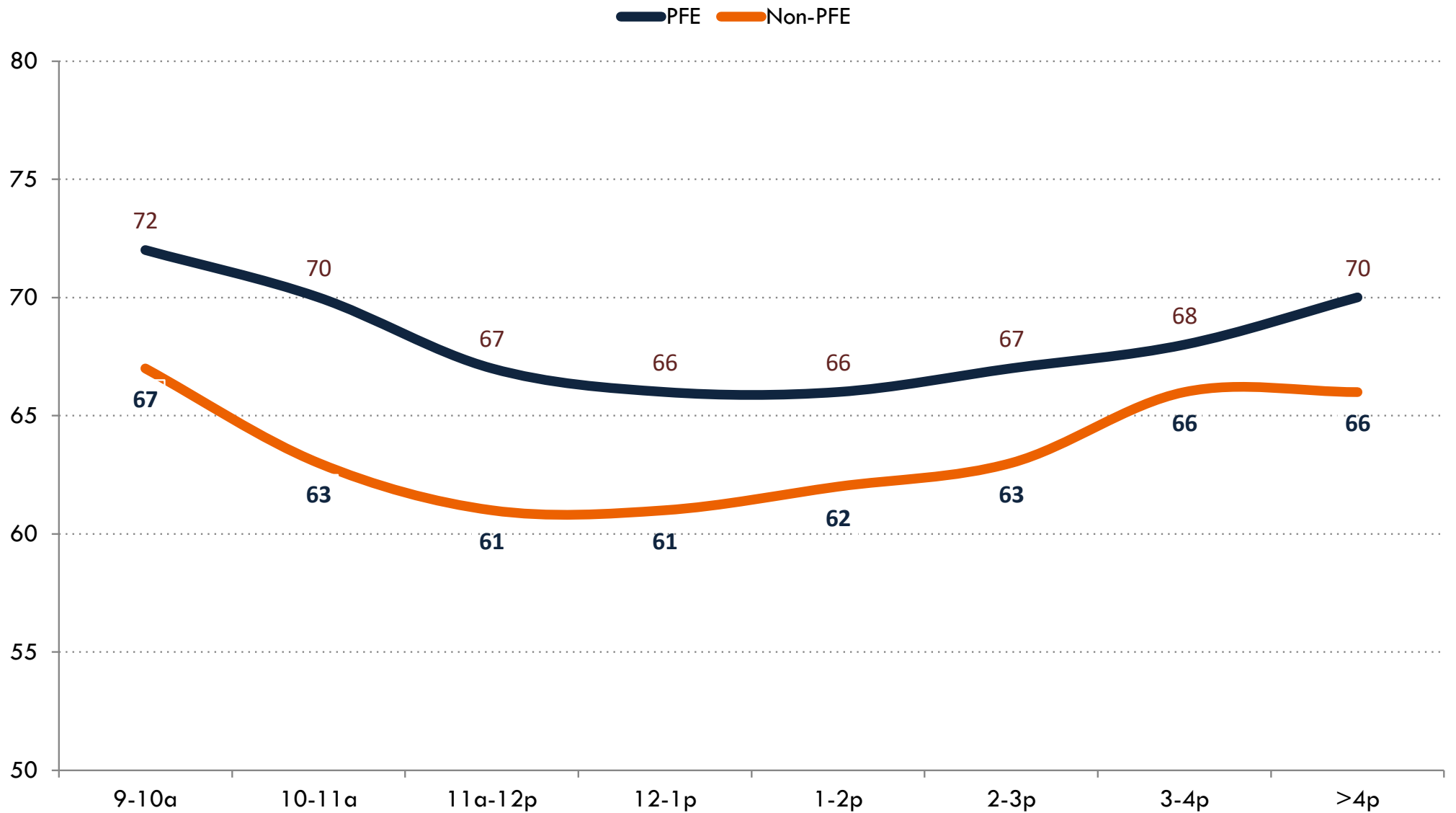
Entertainment experience



Educational experience

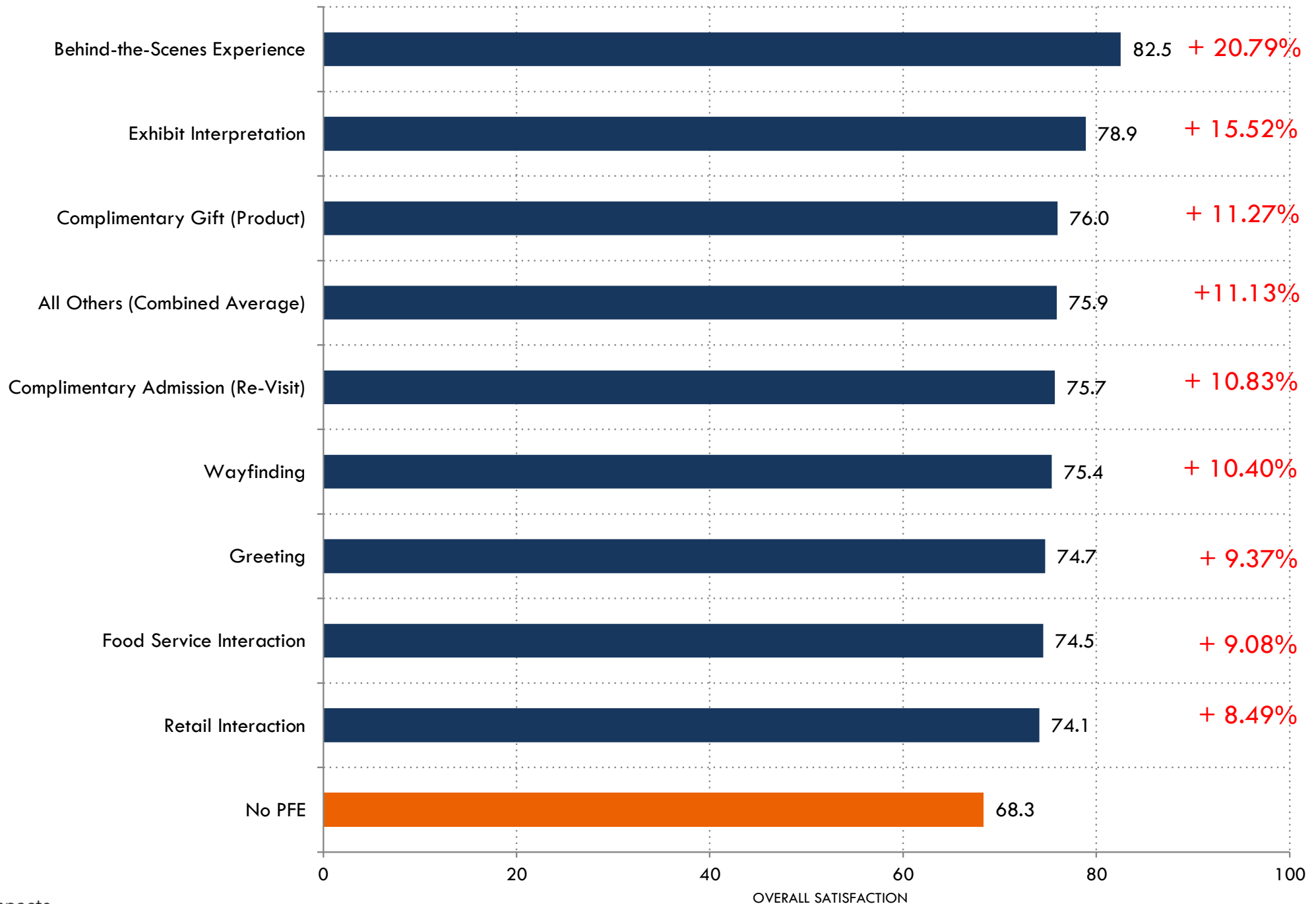


Overall satisfaction by day part



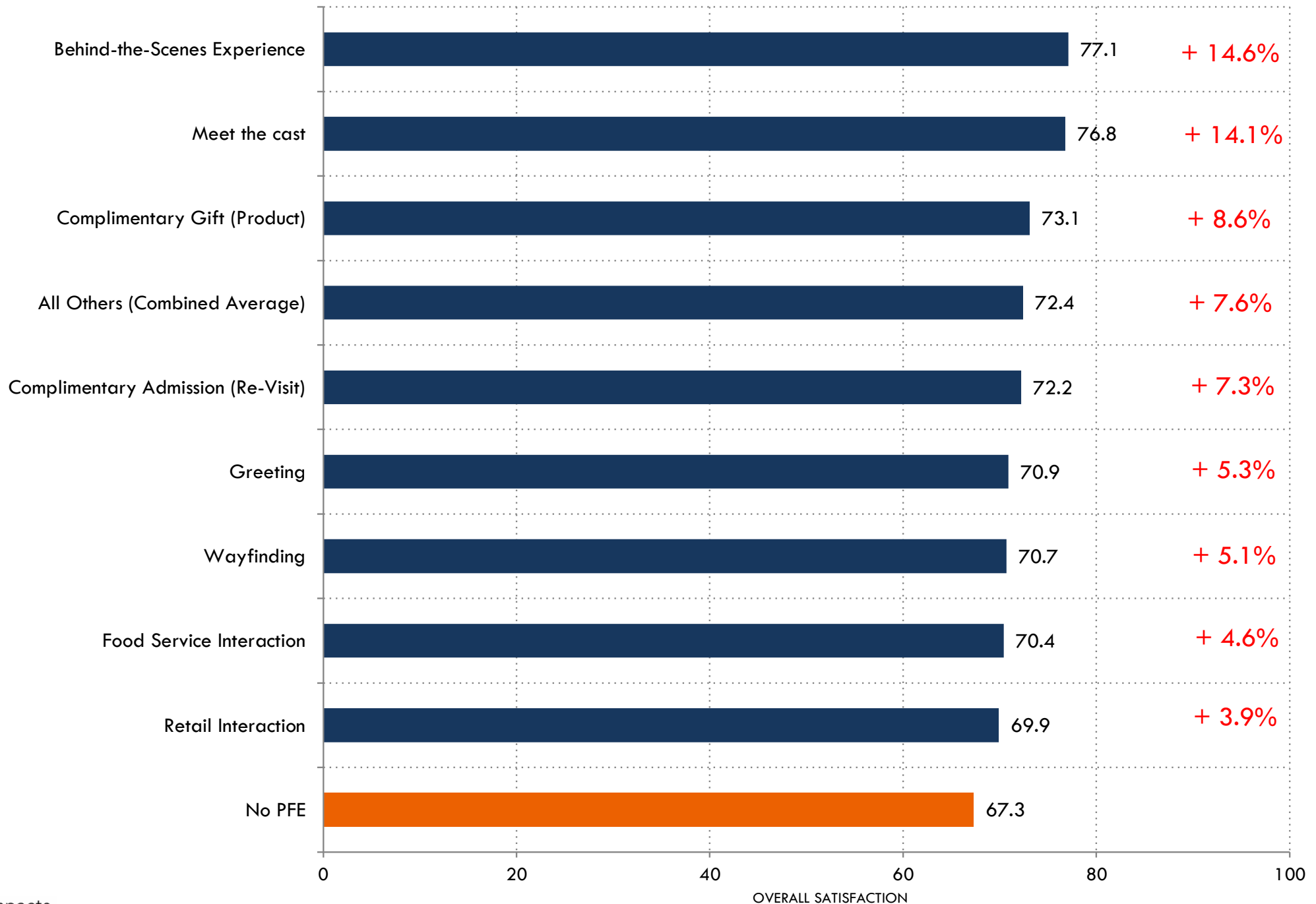
Overall Satisfaction by Primary PFE Descriptor

US Cultural Organizations



Overall Satisfaction by Primary PFE Descriptor

US Performing Arts Organizations



Overall Satisfaction

Among US visitor-serving organizations

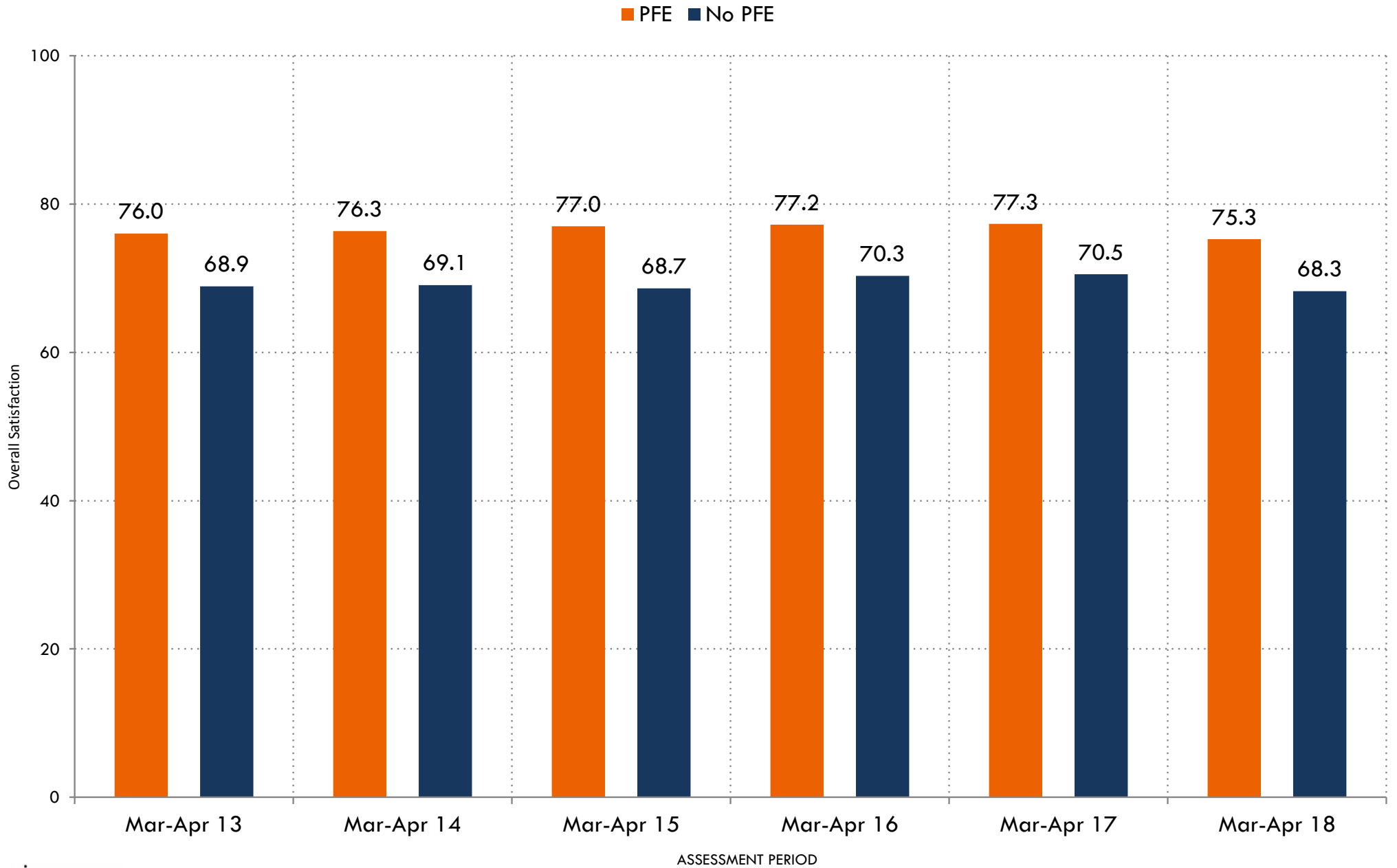
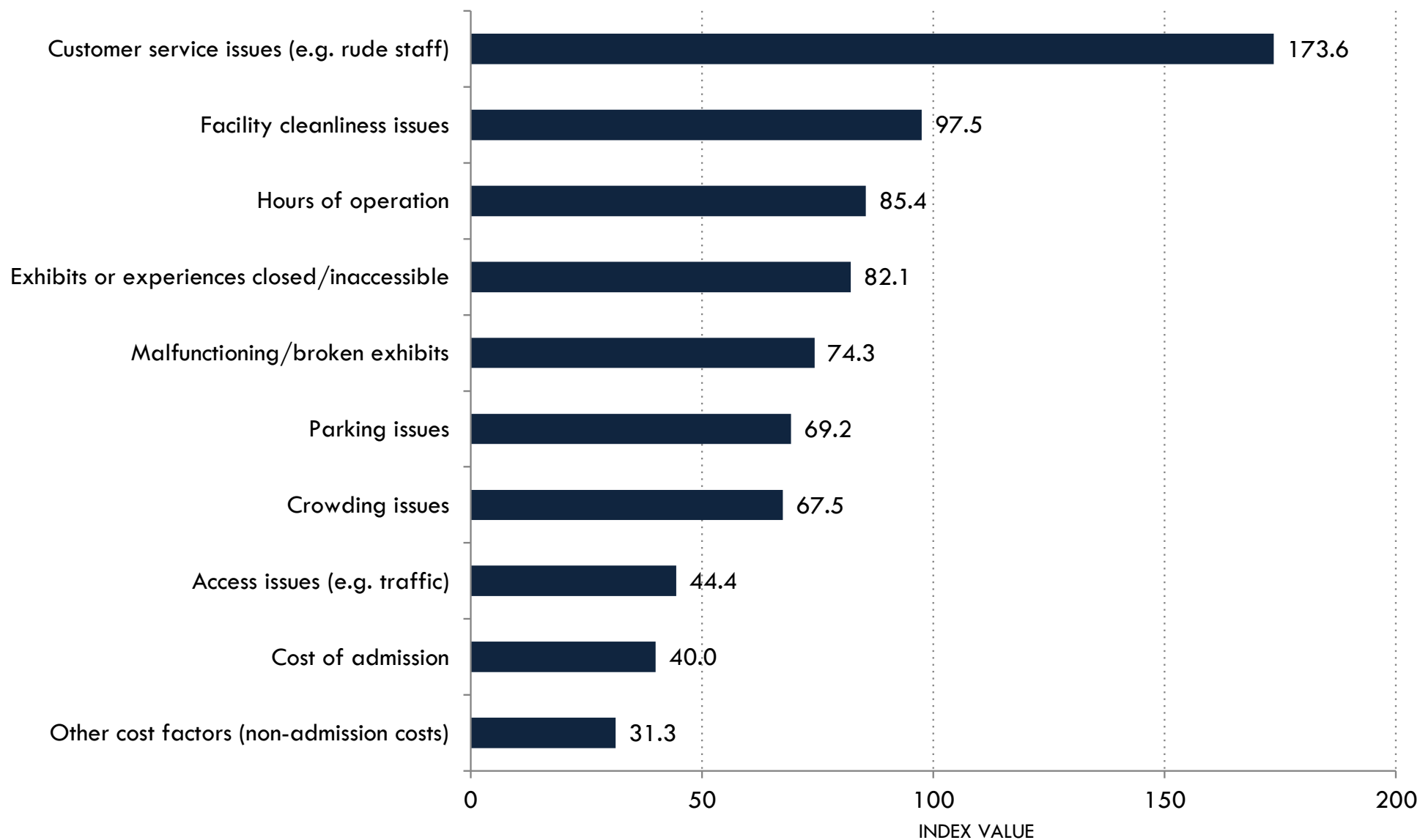


Exhibit-based VSO dissatisfiers

(Most recent visit reporting overall satisfaction <60)

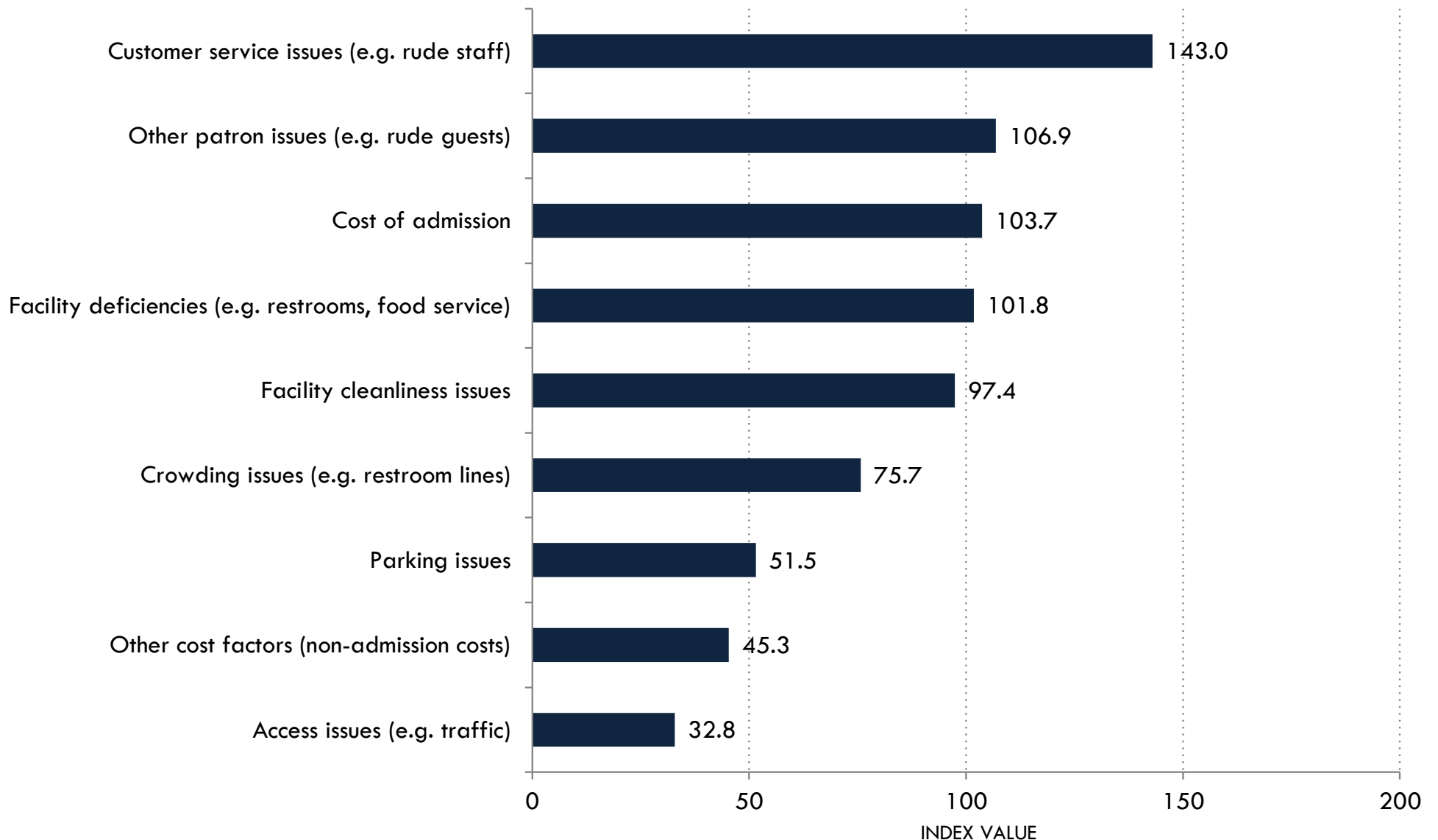
What factors contributed to your less-than-satisfying experience when you last visited a ... ?



Performing arts VSO dissatisfiers

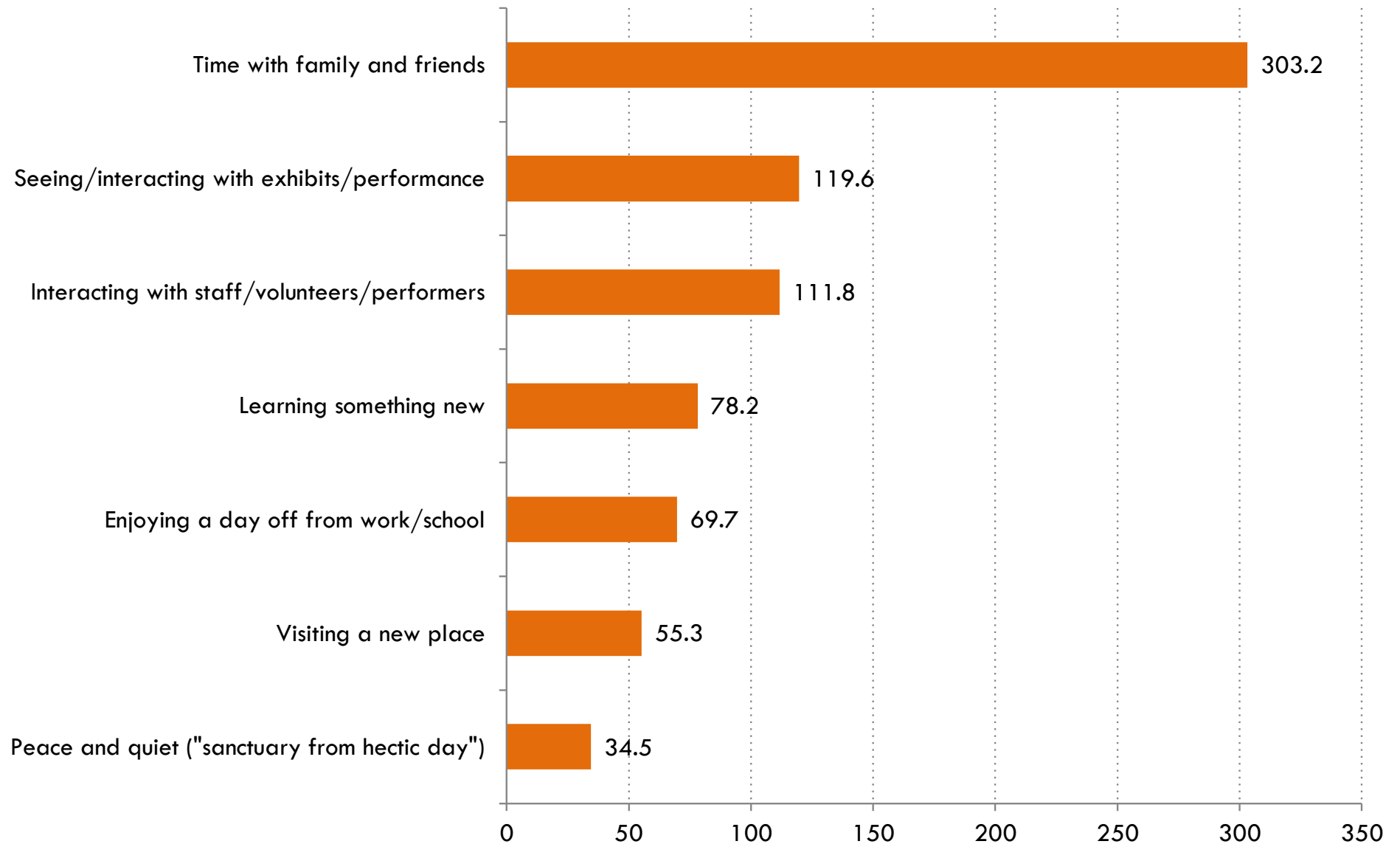
(Most recent visit reporting overall satisfaction <60)

What factors contributed to your less-than-satisfying experience when you last visited a ... ?

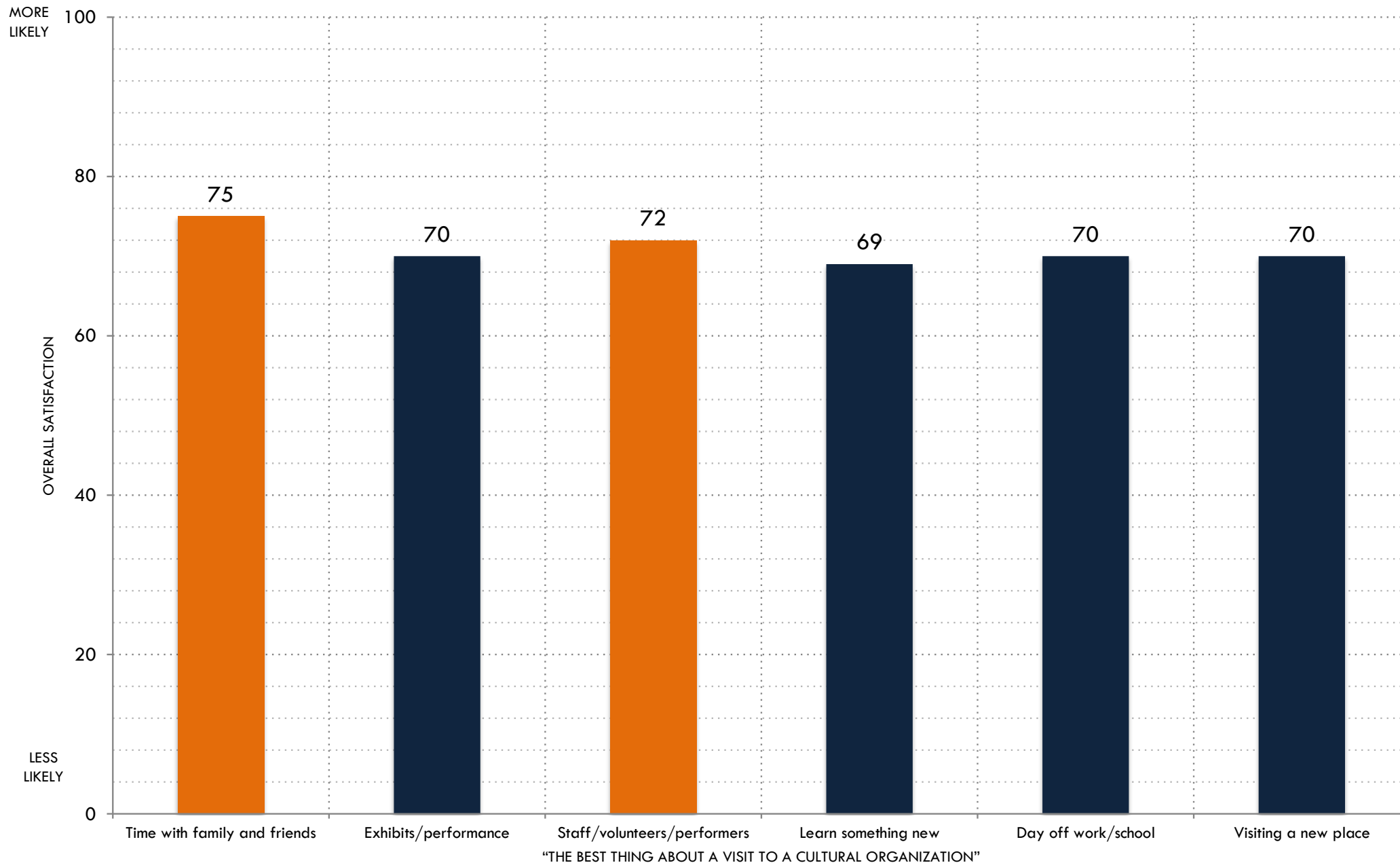


What is the best thing about a visit?

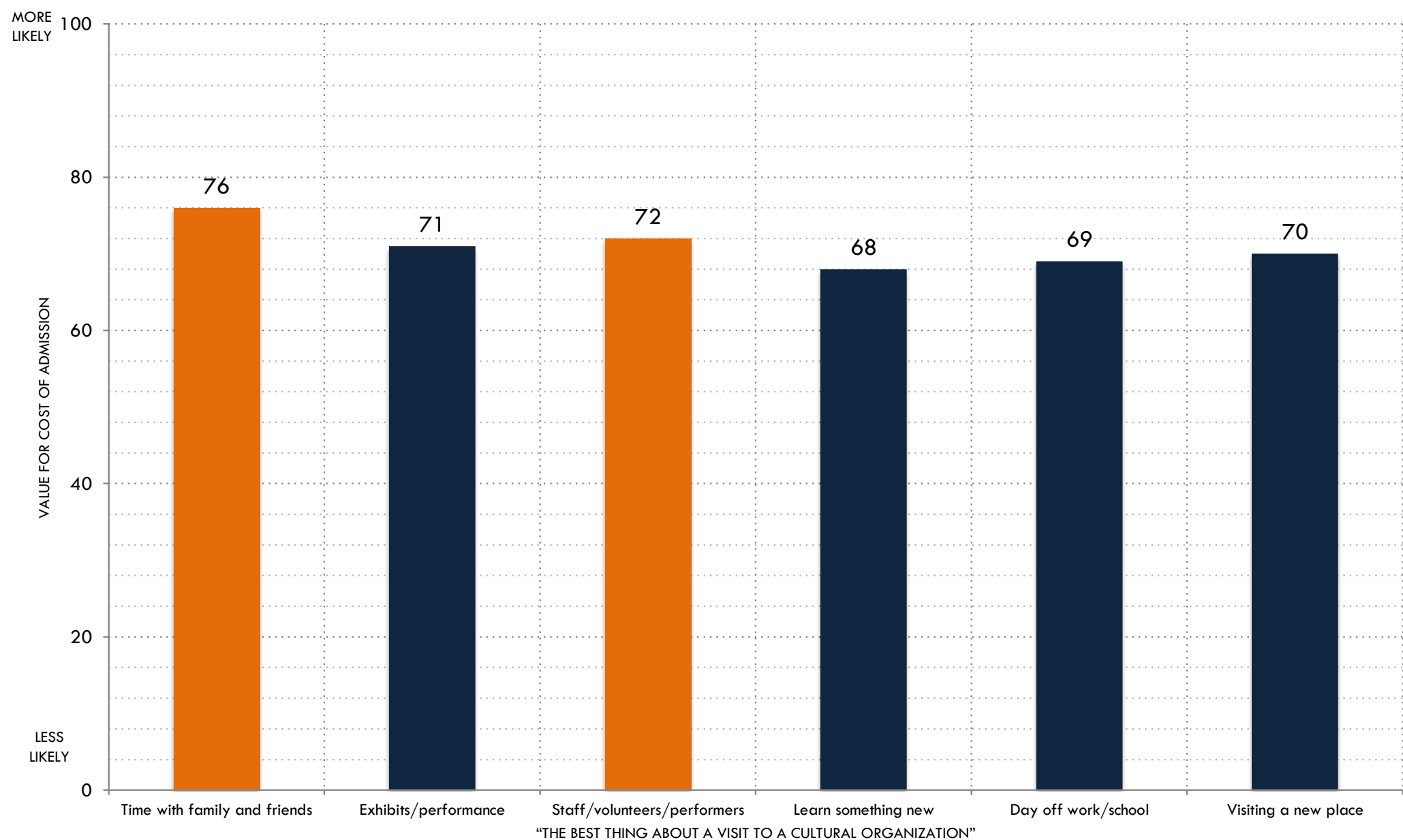
With > what



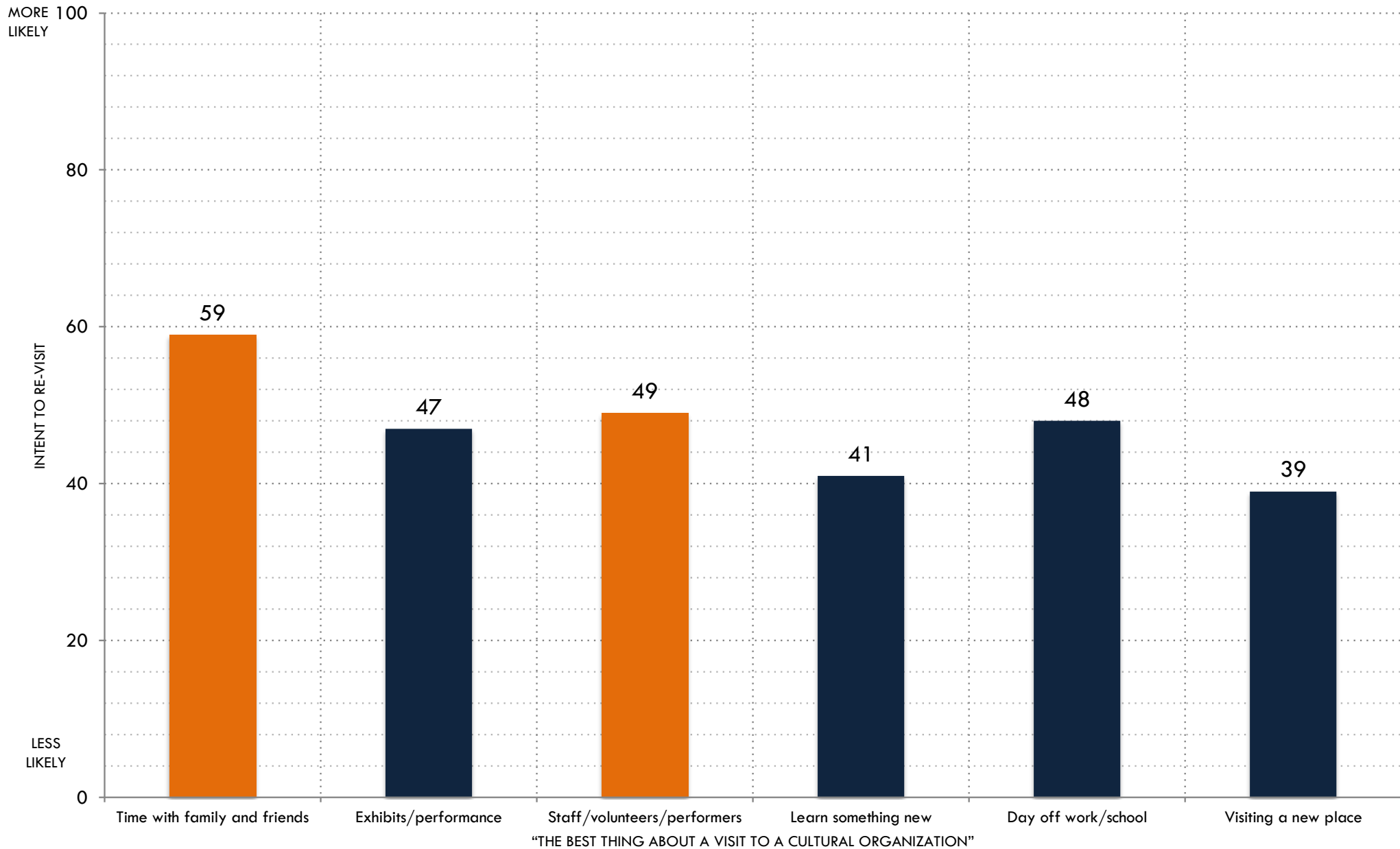
Overall Satisfaction by Best Visit Attribute



Value for Cost by Best Visit Attribute



Intent to Re-Visit Within One Year by Best Visit Attribute



Our goal is to share data that enables you to understand audiences so that you can “meet people where they are.”

Thanks and appreciation to...

- California Academy of Sciences
- Carnegie Museums
- Exploratorium
- European Union
- European Union Cultural Consortium
- Google
- IMPACTS Research & Development
- MAXXI, Museo Nazionale delle Arti del XXI Secolo
- Monterey Bay Aquarium
- Musée du Louvre
- Musée d'Orsay
- National Aquarium
- National Oceanic and Atmospheric Administration
- Stanford University
- Tennessee Aquarium
- The Ocean Project
- United Nations Educational, Scientific and Cultural Organization
- US Department of State

Nerd out with us...



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