

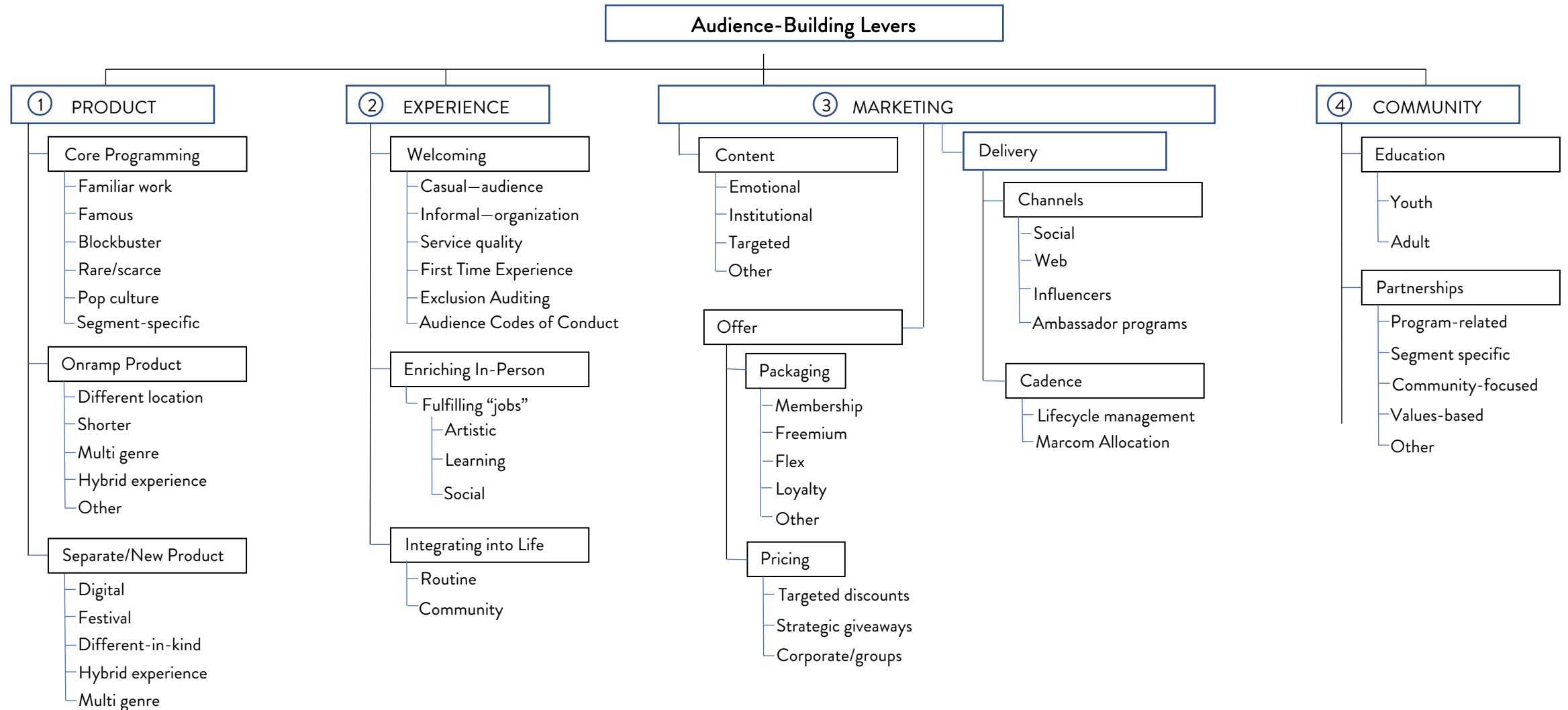


Transforming Arts Organizations Worldwide

Addressing Audience Decline: A Taxonomy of Approaches

November 2022

Addressing Audience Decline: Taxonomy of Arts Organization Efforts



1

Product-Based Audience Development Practices

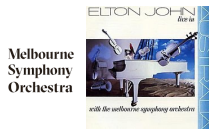
CORE PROGRAMMING

“Populist” work



Most orchestras now play concerts accompanying pop culture phenomena (e.g., movies, video games). In 2022, BBC Proms concluded its season with its first “Gaming Prom,” From 8-Bit to Infinity (RPO).

Famous



Many arts organizations leverage talent with fame outside the genre to draw people in and expand appreciation of the artform. With rare exception (e.g., Pavarotti, Misty Copeland, Ma), in-genre talent doesn’t draw new audience.

Blockbuster/Rare/scarce



Across entertainment, economics are favoring “blockbuster” performances and once-in-a-generation events. To offset the considerable expense of Hamilton, The Kennedy Center tied ticket access to the purchase of multi-year subscriptions.

Segment-specific



Many arts organizations now create programming targeted at specific segments. However, one-off events (such as Houston Symphony’s Selena tribute concert), have very little crossover to “core” programming.

ONRAMP PRODUCT

Atypical Locations

Philharmonia



Many arts organizations are exposing new audiences to their work by bringing performances into the community. The The Philharmonia packs parking garages with 20- and 30-somethings for eclectic £8 shows.

Shorter



Shortened performances acknowledge the reduced attention spans of adult audiences and children. The Florida Ballet provides abbreviated performances (and educational resources) for student groups.

Multi Genre



Younger audiences are often less interested in boundaries within arts genres. Carl Craig is known for attracting younger audiences by merging classical and techno sounds.

Format-Bending



To challenge stereotypes that may be keeping potential audiences away, some arts organizations are creating experiences that defy categorization within a single artform.

SEPARATE/NEW PRODUCT

Festival



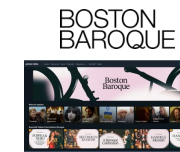
The festival model allows more diversity in programming and overall experience and can complement core programming. Opera Philadelphia adopted the approach to attract more opera lovers to the region.

Immersive



Organizations are breaking down walls between artists and audiences to cause patrons to “feel” the art in a personal way. In EXO’s Rite of Spring, audience-members dance and interact with artists.

Digital



While few organizations have monetized digital product, some have developed consistent revenue streams. Boston Baroque has cultivated worldwide audiences for its concert streams

Different-in-kind



Some organizations, including “Death of Classical” are trying to bring new life to the performing arts by “killing” its traditional form through creation of unique, unexpected experiences.

2

Experience-Based Audience Development

WELCOMING

Casual—Audience



Many organizations have loosened dress requirements and removed other barriers to participation. Battersea starts each performance by announcing that patrons are free to come and go, and even make noise.

Informal—Organization



To humanize the experience, organizations are loosening behavioral restrictions for their own artists and staff. The Oakland Symphony allows musicians to wear casual dress and talk to the audience from the stage.

Service Quality

Organizations are increasingly focusing on improving the experience across all audience touchpoints. Steppenwolf has invested in hotel-industry staff to offer concessions/lobby experiences as the same level of the artistic experience.

STEPENWOLF

First-Time Experience



Organizations are increasingly focused on providing different experiences at different points in the customer journey. California Symphony provides high touch experiences to first-time attendees.

Exclusion Auditing



Organizations can unintentionally turn off diverse audiences through small, unintentional signals (e.g., no Nutcracker dolls of color) PNB conducted an experience audit to identify and fix exclusionary moments across the end-to-end experience.

Audience Codes of Conduct



Increasingly, arts organizations are creating codes of conduct to ensure audience-members are not turned-off by fellow patrons. The Children’s Museum of Manhattan’s code focuses on empathy and kindness.

ENRICHING IN-PERSON

Artistic



Arts organizations are becoming more permissive of electronics during performances. Notestream, developed by the creator of Guitar Hero, pushes commentary timed to specific moments in the performance.

Learning



PRE- & POST-SHOW ENGAGEMENT

Arts organizations can appeal to lifelong learners seeking personal growth in the arts (among many other areas). CTG provides a specific source for learning on its website.

Social



To break down opera stereotypes, the San Francisco Opera presented the first act of La Traviata, followed by an evening of food, drinks and dance themed around the remaining acts.

INTEGRATING INTO LIFE

Routines



To keep in the consciousness of audiences, organizations are finding ways to embed in their routines. For example, Boston Baroque has playlists for meditation, sleep and wedding dinners.

Community



Houston-based ROCO places QR codes in a local park to enhance the outdoor experience and raise awareness of music’s ability to enhance life experiences.

3 Marketing-Based Audience Development—Content

EMOTIONAL

Creating emotional connection is the key to building customer loyalty. Increasingly, arts organizations are creating marketing content that moves beyond program marketing to connect with the deeper feelings that the arts tap into.

Utah Symphony interviewed audiences using a special technique designed to elicit their deepest emotional connections to the organization

UTAH SYMPHONY
CLASSICALLY CHARGED
THIERRY FISCHER, MUSIC DIRECTOR



INSTITUTIONAL

To bring in casual and first time customers, consumer brands market institutionally (rather than at a product level). Some arts organizations are beginning to embrace the power of connecting audiences to the organization through emotional, institutional campaigns.

The Royal Ontario Museum has launched ROM Immortal, an institutional campaign to launch its natural and human collections.

ROM



LIFECYCLE

Some arts organizations are segmenting their messaging to audiences based on where they are in their audience development journey. Marketing is focused on getting customers in each stage of the development to the next step—and nothing more.

The Minnesota Opera directs special messages to first-time audience members, encouraging them to return before they leave the venue and recommending specific seats.

MN
OPERA

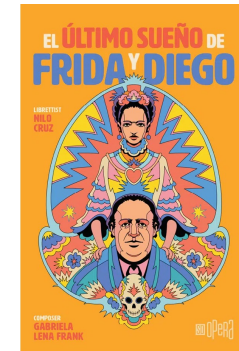


TARGETED

To grow faster than the rate of population growth, it's important to target customer groups that are growing faster than the market. Some arts organizations are beginning to make sustained efforts to cultivate the attention and trust of fast-growth segments.

The San Diego Opera has developed and marketed a variety of initiatives to create connections and celebrate the cultures of Hispanic communities around the city.

SD OPERA



3 Marketing-Based Audience Development—Offer Design

PACKAGING

Freemium



To encourage early engagement and in return for basic customer information, [Scottish Ballet](#) offers a free membership program that gives access to scalable, fixed cost product (e.g., digital magazine, film access). The platform gives the ballet a base from which to expand the relationship over time.

Simplified Membership



Zach Theatres people are more likely to commit to a single, simple membership program (rather than one with complex tiers). Zach's simple membership offers unlimited access to tickets, free parking and discounts on tickets and other items.

Flex

STEPPENWOLF



To make it easy for young audiences to establish attendance patterns, [Steppenwolf](#) makes economical to buy tickets in bulk and allocate them across performances as they wish.

Loyalty Programs



Loyalty programs abound in the consumer products space, so it's no surprise that arts organizations are experimenting with points-for-purchase programs. At the London Philharmonic, members receive redeemable points with each ticket purchase.

PRICING

Targeted Discounts



To make a push into specific segments, [Minnesota Opera](#) provides deep discounts available to new and seasoned patrons.

When introducing the program, the organization analyzed and accepted the cost of cannibalization from young patrons already paying for seasons tickets at higher prices.

Tempo members can include friends (in the same age range) in their ticket purchases.

Strategic (Near) Giveaways



PNB provides nearly-free tickets to holders of a TeenTix Pass (which is available for 70+ cultural organizations in the Seattle area).

In addition to creating a long-term pipeline of arts lovers, the program creates visibility and goodwill in the larger community.

The key to the program is to use excess capacity to build long-term audience potential without undermining the brand in the near term.

Corporate/Groups



A small number of arts organizations equip enthusiasts who are also executives in large companies to organize group attendance deals.

While "foxhole by foxhole" marketing can seem formidable for leanly staffed marketing organizations, the use of advocates within corporate partners (rather than corporate community relations staff) can reduce the burden significantly.

3 Marketing-Based Audience Development—Delivery

CHANNELS

Social



Creating a strong social media presence requires constant care and feeding as well as content purpose-built for particular social media platforms.

To bring focus, best organizations think hard about what social media presence is most important to advance their mission.

The Museum of Neon Art creates content that effectively sparks interest in the art form, in line with its mission to “spark curiosity and keep history aglow”

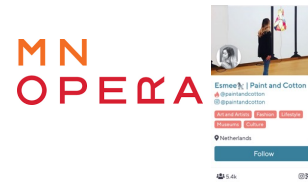
Web



The best websites are organized around what target customers most want to accomplish, not what organizations most wish they would accomplish.

Ballet Austin positions itself as an organization seeking to advance the physical and mental health of the community. It organizes the community section of its website around all the ways it can help individuals become more healthy (rather than recounting its community engagement activities).

Influencers



While JZ and Beyonce’s photoshoot at the Louvre yielded a 25% bump in visitors, very few arts organizations have the funds to work with mega-influencers.

However, micro-influencers in local markets (with fewer than 25,000 followers) can be powerful marketing amplifiers. Inviting them to events and trading tickets for playbill posts is an easy way to experiment and build relationships.

The **Minnesota Opera** has used a local media personality to focus on referrals.

Ambassadors



Word of mouth is a powerful driver of attendance. Social network analysis shows that a small number of people are responsible for a large percentage of high-quality referrals.

The **Charlotte Ballet** has designed a program for community ambassadors, called the “Corps de Ballet,” which it equips with knowledge to evangelize in the community. In addition, the ballet explicitly designates board Advocates to represent the organization publicly.

CADENCE

Lifecycle Management



Because of the reliance on contributed income, organizations are often quick to view new-to-list customers as donor prospects. However, few of these customers would describe their relationship as “ready to donate.”

The **California Symphony** refocused its marketing efforts on getting customers to the *next* milestone, requiring a different set of metrics and segmented communications. Key metrics include: number of first-time audience members who return and new-subscriber renewal rate.

Marcom Allocation



Savvy marketers create marketing budgets based on performance of past productions with similar characteristics, closely track sales relative to projections and double down on winners rather than try to ‘salvage’ laggards.

Coming out of Covid, some marketing departments, including the **Old Globe**, are splitting spend, raising awareness in advance, then spending on conversion later-than-usual in the cycle to capitalize on “indecisives.”

4 Audience Development through Community Engagement

EDUCATION

Youth



From the audience-development perspective, focusing on K-12 represents the “long game.” [The Spoleto Festival](#) hopes to encourage next-generation viewers through active engagement and support, rather than just inviting them to performances.

[Spoleto](#) developed the Omar project, for example, to create deeper ties with teachers, students, and their parents.

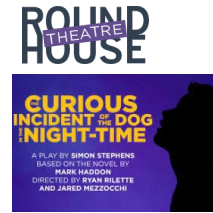
Adult



Especially in artistic forms that feel ‘limited’ by tradition, adult education can provide an opportunity to engage with prospective adult audiences in a dynamic way.

The [Barnes Collection](#), an organization contractually prohibited from changing its space or collection, uses adult education programs to advance its mission while at the same time bringing its collection to life in a way it cannot in its physical space.

Situational



Arts organizations are increasingly putting on works that resonate with important conversations taking place in the community.

The [Round House Theatre](#) creates situational partnerships with organizations that have a stake in themes being raised on stage.

PARTNERSHIPS

Segment-Specific



To boost build more diverse audiences, organizations are increasingly reaching out to specific ethnic communities. These relationships require slow, steady trust-building to be successful.

The [Santa Cruz Museum of Art and History](#) has developed a strong multi-year partnership with the Hispanic community by opening its facilities and providing resources to improve the Day of the Dead festival with one of its partner organizations.

Community-Focused



Arts organizations can encourage attendance by community-minded patrons by demonstrating that they, themselves are investing in the community.

Calgary-based [Arts Commons](#) has announced its intent to be a “key contributor to the social, economic, cultural and intellectual life and well being of Calgarians...” It has launched a building project to spur job creation, diversification and economic growth in downtown Calgary.

Values-Based



CORE PARTNER PROGRAM

During Woolly's 20-21 season we will be launching the Connectivity Core Partner Program. These are long-term mutually beneficial relationships with organizations who share the same values around inclusion, anti-racism, social justice, and the power of art. These core partnerships will allow both parties to accomplish together what neither could do alone, resulting in opportunities for cross-sector learning and participation in Washington DC's arts, cultural, and civic life.

Increasingly, audiences view purchases as a way to signal to others “who they are.” Values based organizations are increasingly important to younger audiences.

The [Woolly Mammoth Theatre](#) has created long term community partnerships that signal its deep commitment to “radical inclusion.” This deep commitment attracts audiences so compelled by its vision that they may or may not care about the product on stage.