

ANNOUNCING

COMING BACK

STRONGER

*Using the Shutdown to Rebuild Audience Loyalty*

**MEMBERS-ONLY VIRTUAL SUMMIT**



*Transforming Arts Organizations Worldwide*

Welcome to the Summit

October 2020

# Agenda for our Time

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01

WELCOME  
Our Summit  
attendees and  
context

02

OCCASION  
FOR THE  
RESEARCH  
Why we are talking  
about audience  
loyalty now

03

AGENDA &  
UPCOMING  
EVENTS  
The Summit  
elements,  
timing and  
calendar

# Our Summit Participants for the PM Session

## ALLEY THEATRE

Dean Gladden  
Rachel Applegate

## AMERICAN SHAKESPEARE CENTER

Ethan McSweeney

## ARTS COMMONS

Kaija Dirkson  
Tasha Komery  
Alex Sarian

## ASPEN MUSIC FESTIVAL & SCHOOL

Alan Fletcher  
Laura Smith

## ASPEN SANTA FE BALLET

Jean-Philippe Malaty

## AUSTIN OPERA

Annie Burr ridge  
Melysa Rogen

## BERKELEY REP THEATRE

Susie Medak

## BRAVO! VAIL

Caitlin Murray

## CENTER THEATRE GROUP

Meghan Pressman  
Garrett Collins

## FORD'S THEATRE SOCIETY

Liza Lorenz

## GOODMAN THEATRE

Roche Schulfer  
Jay Corsi

## GRAND TETON MUSIC FESTIVAL

Emma Kail  
Andy Mahoney  
Willow Larson

## HOUSTON GRAND OPERA

Perryn Leech  
Dale Edwards  
Scott Ipsen

## ICELANDIC OPERA

Steinunn  
Birna Ragnarsdóttir

## JACKSONVILLE SYMPHONY

Steven Libman

## JOFFREY BALLET

Greg Cameron

## KANSAS CITY SYMPHONY

Jeff Barker

## LA JOLLA MUSIC SOCIETY

Leah Rosenthal  
Adam Thurman

## LA JOLLA PLAYHOUSE

Mary Cook  
Mia Fiorella

## MELBOURNE SYMPHONY

Sophie Galaise  
John Nolan  
Fraser Stark

## MIDLAND CENTER FOR THE PERFORMING ARTS

Diane Wilcox

## PHILADELPHIA ORCHESTRA

Matias Tarnopolsky

## PORTLAND CENTER STAGE

Cynthia Furman  
Sharon Martell

## RICHMOND SYMPHONY

Frances Sterling

## ROCO

Greta Rimpo  
Alecia Lawyer

## ROYAL IRISH ACADEMY OF MUSIC

Audrey Phelan

## SAN DIEGO OPERA

David Bennett

## SAN FRANCISCO OPERA

Matthew Shilvock  
Jen Lynch  
Chi-Hsuan Yang  
Troy Smith

## STEPPENWOLF THEATER

Kara Henry  
Kerstin Adams

## TEATRO SAN CARLO

Francesca Pecoraro

## THE OLD GLOBE

Tim Shields  
Dave Henson  
Llewellyn Crain

## THE WALLIS

Rachel Fine  
Mark Slavkin  
Joel Hile

## VERBIER FESTIVAL

Stephen McHolm

## VICTORY GARDENS

Roxanna Conner

## WOLF TRAP FOUNDATION

Arvind Manocha

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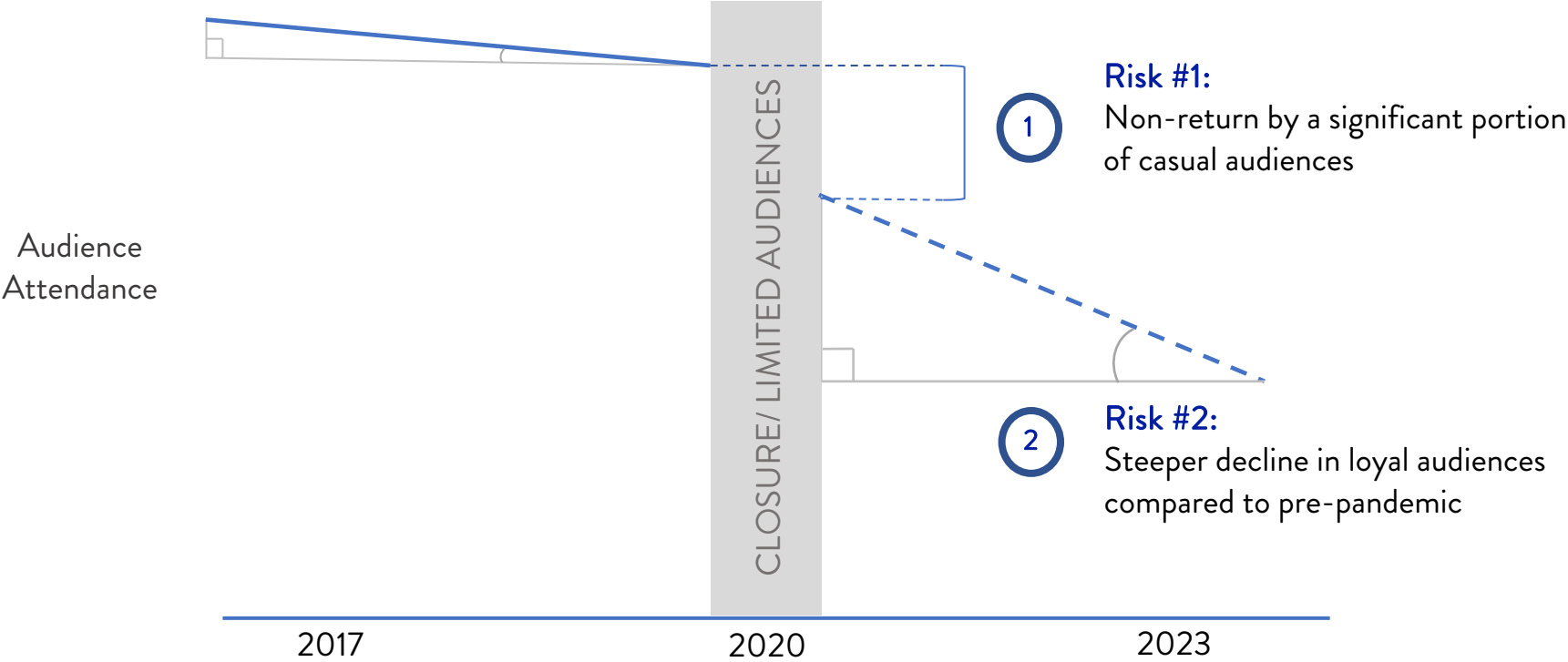
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# The Risks to Audience Return Post-Pandemic Are Real

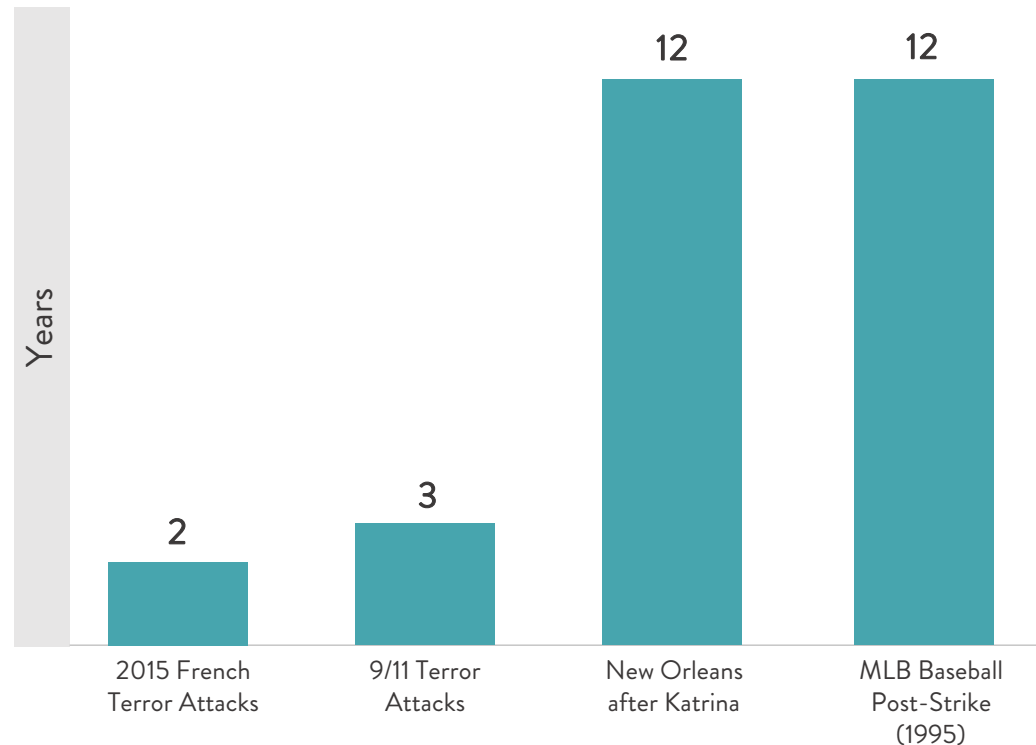
## Post-Pandemic Risks to Audience Loyalty at Arts and Culture Organizations



Source: ABA research.

# Disruptions Have a History of Changing Behaviors

## Time To Visitor Recovery Post Incident



## What Determines Likelihood of Returning to Old Habits After Disruption?

- How frequent and rigid is the new behavior compared to the old behavior?
- How strong and disciplined was the original habit?
- How much does the habit depend on context? (social context, technology changes)

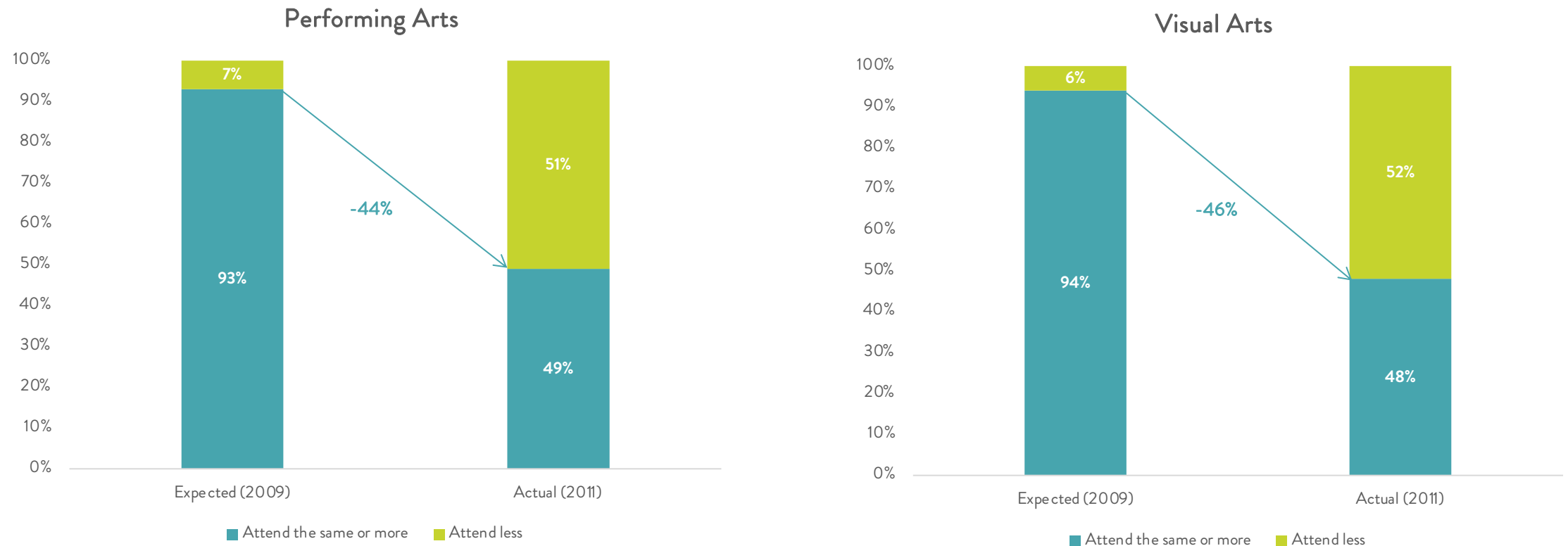
**For most, arts consumption habits were not strong pre-pandemic and there are now many culture and entertainment replacements**

Sources: [EDN Hub](#), [US Dept of Transportation](#), [Baseball Reference](#), [New Orleans CVB](#)

Sources: <https://lrwonline.com/perspective/consumer-psychology-and-coronavirus-turning-new-habits-into-opportunities/>  
<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7269931/>

# We Can't Count on Audiences To Predict Their Own Behavior

When performing and visual arts audiences were asked in 2009 about the likelihood of the economy affecting their ability to return after the financial crisis, their expectations were far more optimistic than the reality two years later.



Source: [Culture Track 2011](#)

# The Risk Is Not the Same for All Audiences



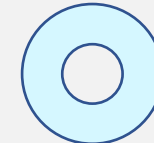
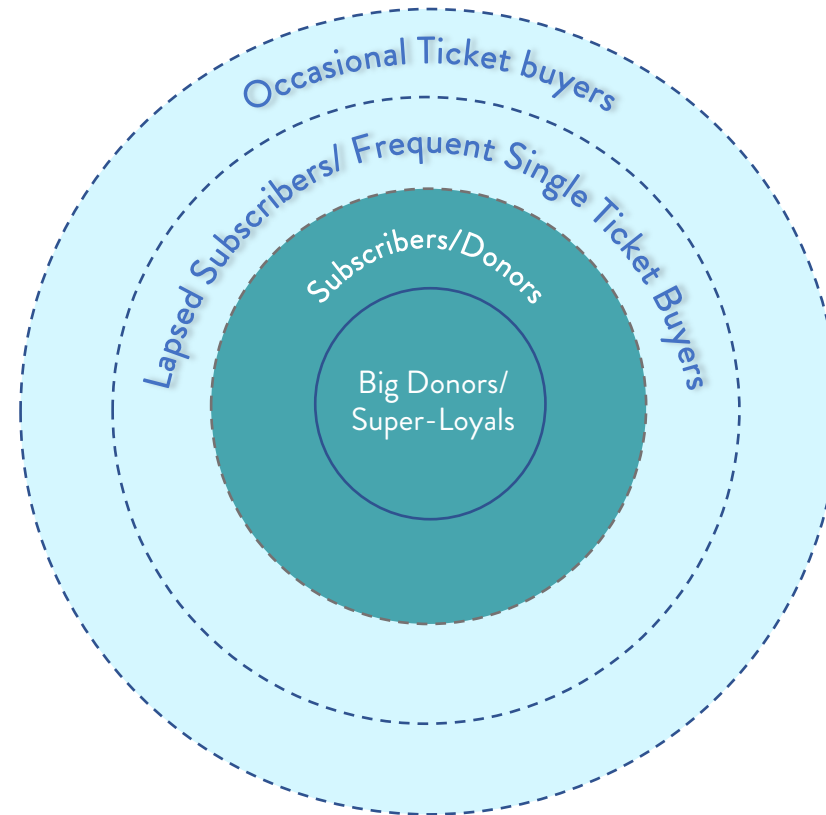
## Loyals

### More Likely to Consume Our Current Offer

Digital content frequently repackages the in-person experience in a home-friendly way, which is exactly what “Loyals” want.

### More Likely To Return on Their Own

For a large minority of your audience, your artform or cultural genre is intrinsically valuable. They would likely return no matter what you do during closure.



## Not-Yet-Loyals

### Less Likely to Consume Our Current Digital Offer

Most arts and culture organizations (79%) tell ABA that their digital efforts are directed at all existing audiences, but not-yet-loyals are significantly less likely to consume.

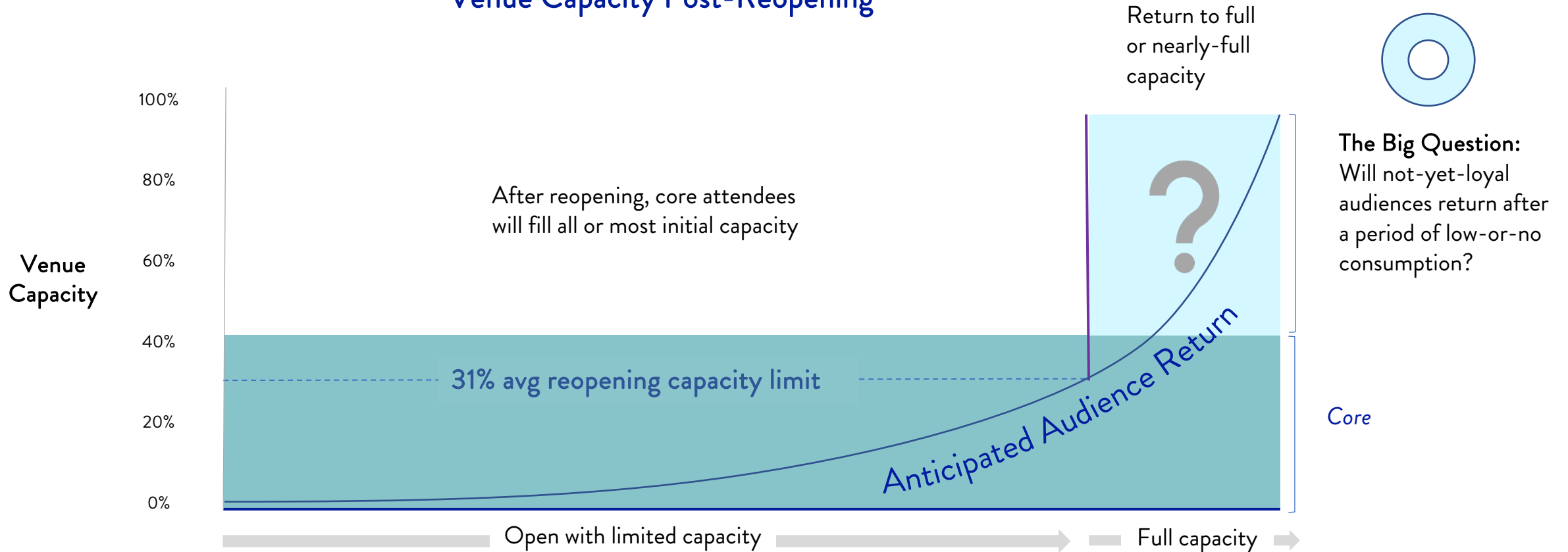
### More Likely To Diverted from the Arts

Because they’re less attached to the arts, single ticket buyers are more susceptible to distraction and change during closure.



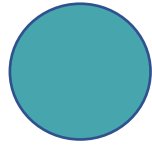
# We Particularly Need to Secure Casual Audiences

## Venue Capacity Post-Reopening



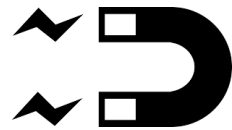
Source: ABA research; segment analytics of ABA's arts motivation survey.

# How Do We Increase Our Bond to Not-Yet-Loyals?







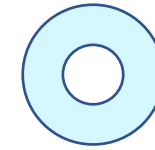
## Current Loyals

- ✓ Value our “pandemic” offerings
- ✓ Attached to our genre at an emotional level
- ✓ Feel a connection to us as purveyor of the genre



**Arts and Culture Offer During the Pandemic**

 Digital Content	 Limited In-Person
 Community Engagement	 Virtual Education



## Not-Yet-Loyal Audiences

- ✓ Barely consume “pandemic” offerings
- ✓ Are less emotionally engaged to the genre itself
- ✓ Not especially attached to our organization separate from our programming

# Key Question of Our Research

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“How should I engage with audiences right now to shorten recovery time post-reopening?”

# Dove Real Beauty Sketches

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What is Dove trying to achieve with this video?  
Who are they trying to reach?

# You Might Be Wondering...

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Why are we talking about brands starting movements?

# We Have Plenty of Data to Talk About During Our Sessions

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## *The New Loyals Data Collection*

“Jobs to be done” interviews, market research and in-depth survey with 5,000 responses from broad range of arts attendees.

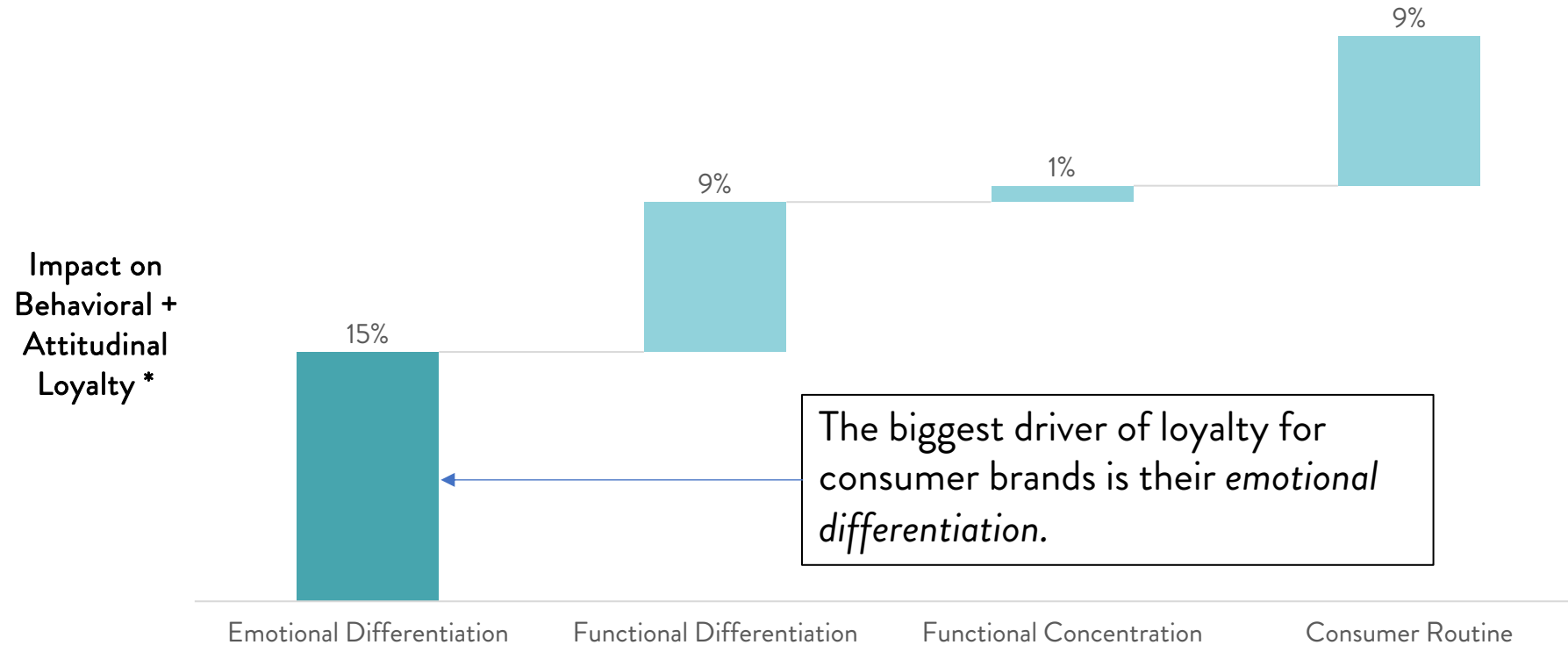


## *Brand Loyalty Analysis*

125 interviews with 23 consumer brands, survey of 10,000 consumers from 16 categories and 73 brands in the US and UK.

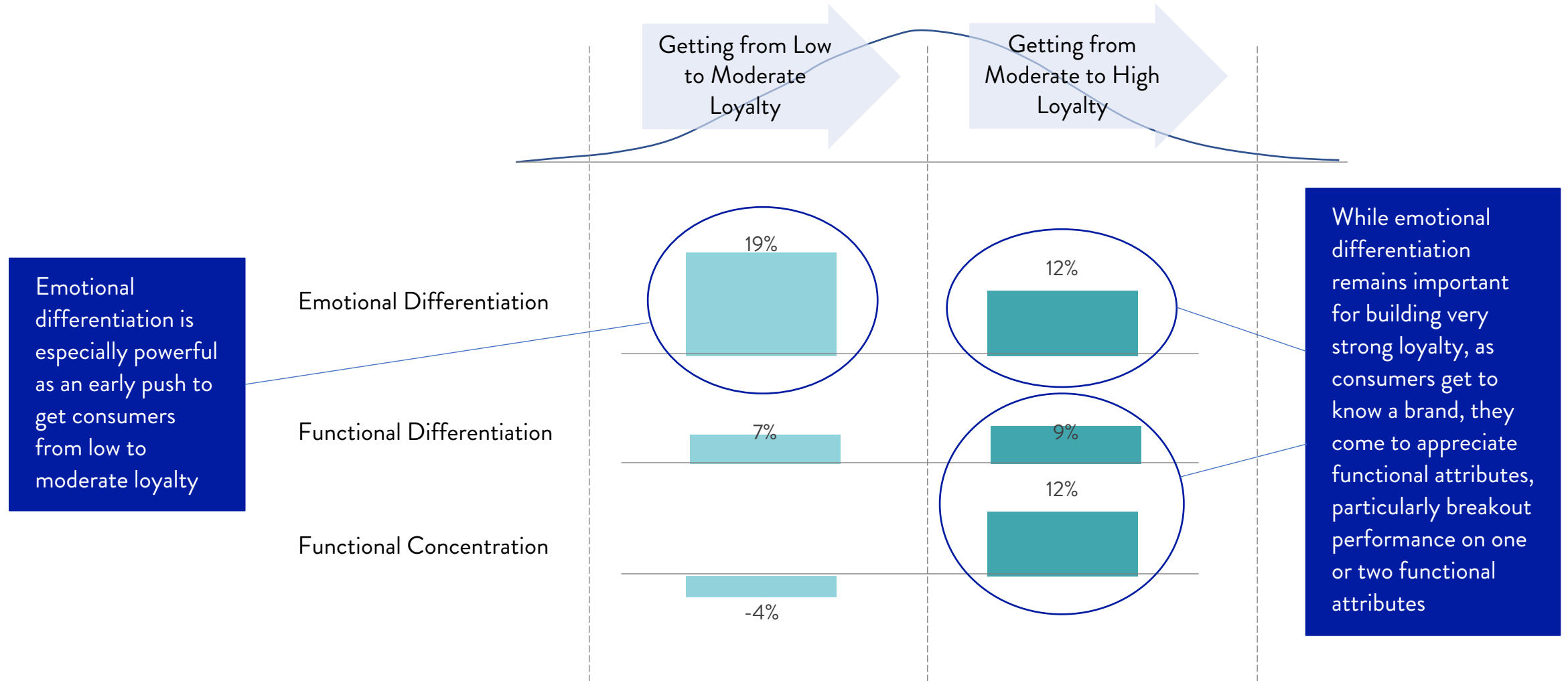
# The Key to Boosting Brand Loyalty is 'Emotional Connection'

## Relative Impact on Loyalty of Brand Attributes



\* Measured as Impact of Moving from 25<sup>th</sup> to 75<sup>th</sup> Percentile Performance on Each Driver. N = ~10,000 consumers. Loyalty defined by behavioral measures (share of requirements, price premium, intent to repurchase) and attitudinal measures (willingness to recommend, word-of-mouth quality, satisfaction and self-identified loyalty). Source: CEB

# Emotional Connection Matters as a Way To Build Initial Loyalty





# Shared Values Achieve a More-Intense Bond in Brands

Higher Order

Level of Emotional Connection

Lower Order



## Functional Benefit

Generating excitement around specific functional aspects of the product/service

Examples:

- Famous spokesperson
- Well reviewed
- New features



## Emotional Benefit

Drawing attention to emotional aspects of the value proposition

Examples:

- Have more confidence
- Experience range of emotions
- Spend time on self care



## Shared Value

Connecting your purpose to beliefs that your target customer holds dear

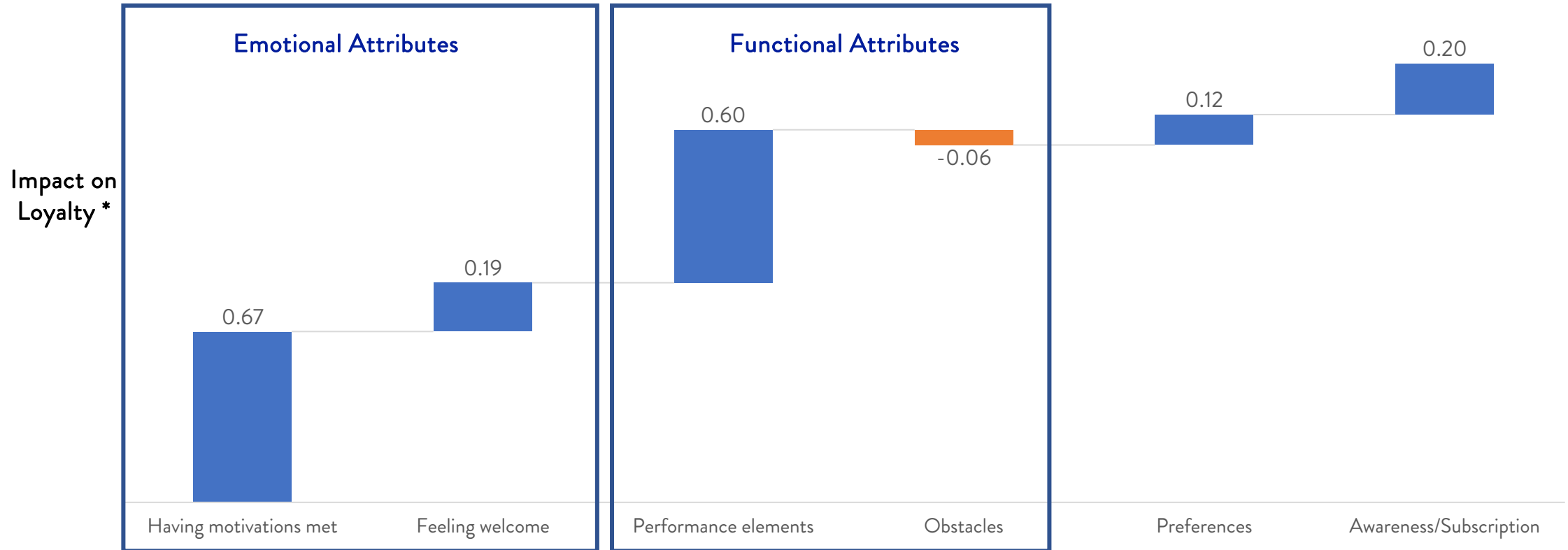
Examples:

- A life spent outdoors is a life well spent
- If you have a body, you are an athlete
- Every dog deserves love



# Arts Audiences Reward Emotional Connection with Loyalty

Relative Impact on Recommendation\*\*



\* Measured as impact of moving from 25<sup>th</sup> to 75<sup>th</sup> percentile performance on each driver. N = ~5,000

\*\*Performance elements = rating of things like performers, composition, staging, seats, staff service, value for money. Preferences refers to interest in challenging or familiar art, or desire to know behind-the-scenes details. Genre was also relevant to recommendation but similarly high for all and uncontrollable, so we did not include it above.

# ...So the Conclusion is This

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Now is the time to know what you stand for  
with enough clarity to take a stand.

# The Consequences Small and Large

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## The Short-Term Opportunity

Aligning messaging around a shared value in the current moment will gain traction.

Telling audiences about your community engagement work will help them understand why they should help your organization right now.

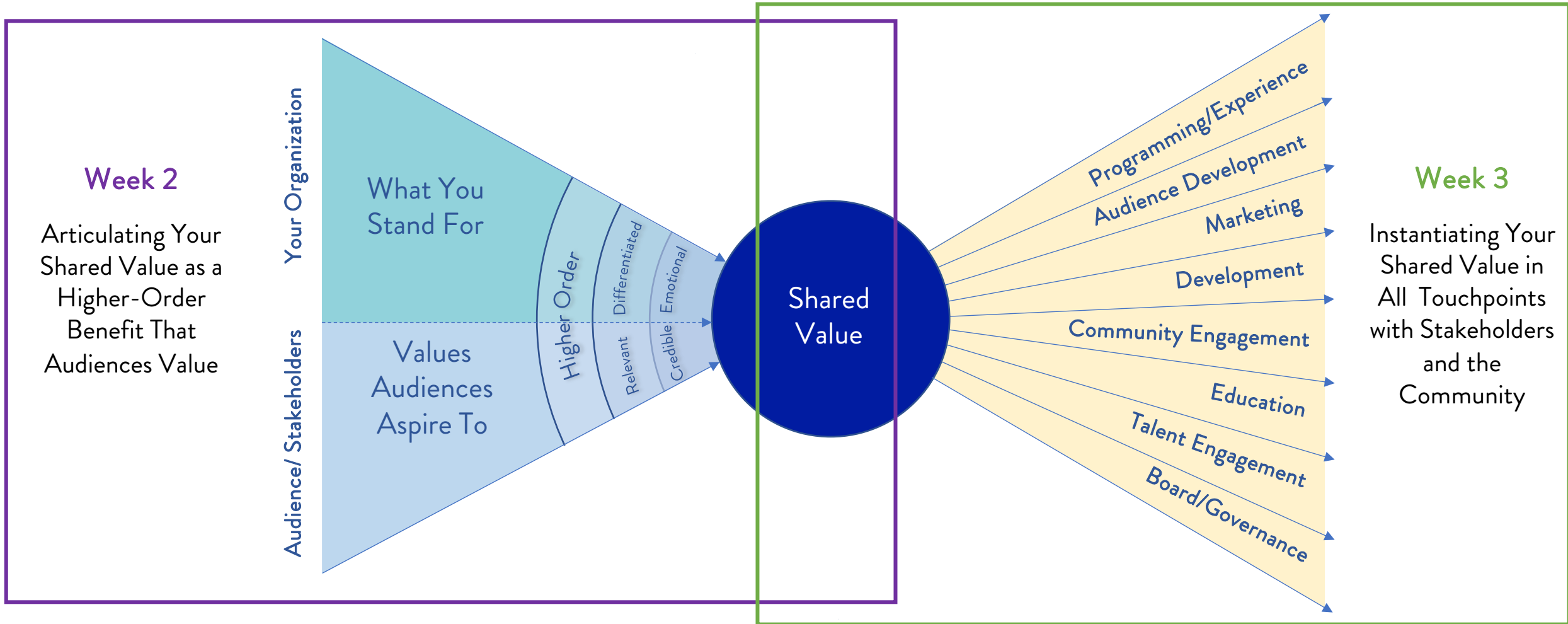
Putting the work you do under a single frame will communicate your organization's meaning more effectively.

## The Long-Term Opportunity

Purpose-driven organizations that **align around shared values** build brand loyalty above and beyond those that focus on functional attributes.

Being purpose-driven means using the shared values statement to make organizational decisions beyond marketing communications, including **partnerships, community engagement, performance experience, digital and philanthropy activities**.

# Building the Purpose-Driven Arts Organization



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The Summit elements, timing and calendar

# Calendar of Events

## Weekly Topics and Overall Agenda

Kickoff Session Oct 29 – for all

Week 1: *The Case for Shared Values*

Week 2: *Defining Your Shared Value*

Week 3: *What to Do Now to Bring Audiences Back*

Closing Session Nov 19 – for all

## Weekly Schedule

Friday	Monday	Wednesday*
Pre-Reads Released	Q&A Session on Pre-Read	Peer Group Session



Consume the “lecture” portion of each week’s content on your own schedule



Attend Monday session to ask questions and reinforce core insights



Meet with breakout group to improve ability to execute, collectively problem-solve

\*The second week peer session will be held Thursday, Nov 12 to avoid the Veteran’s Day holiday in the US

# Ground Rules of the Summit

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CEOs are always welcome but not always required

Join our LinkedIn group

Please preserve the peer sessions

Q&A sessions will help your understanding

Pre-reads available Fridays in 3 forms: course, printout, podcast