

February 2021

WHAT THEY SAY AND WHAT THEY DO

How post-performance survey data can help arts organizations learn more about their audiences

A study by S. Radoff Associates, as part of Wallace's Building Audiences for Sustainability initiative (2014-2019)

Background and Limitations

Background

- This study seeks to understand whether key survey metrics can effectively predict ticket sales, using data from three organizations in Wallace's Building Audiences for Sustainability initiative* [APPENDICES 1 and 2]
 - Goodman Theatre (Chicago)
 - Lyric Opera (Chicago)
 - Pacific Northwest Ballet (Seattle)
- The data from all three organizations is aggregated, except when noted otherwise, and focuses on 2016 single-ticket buyers (STBs), including **first-time STBs** and **returning STBs**.
- Survey data was augmented by follow-up conversations with staff members at the Goodman Theatre and Pacific Northwest Ballet, but not with Lyric Opera.
- Respondents were asked how likely it was that they would return in the future and then tracked to see whether they did return through 2018.
 - "Return" was defined as coming back to a performance within the next two years.
 - The surveys also asked about enjoyment of the production, overall experience and demographic information.

*It is coincidental that two of the organizations are Chicago based, and we believe this does not affect or change the findings.

Background and Limitations (con't)

- We are not aware of any other studies that examine the link between an arts organization's survey metrics (an audience member's stated likelihood to return) with ticket purchasing databases (an audience member's actual return).
- The findings here are consistent with studies of general consumer studies, which find purchase intent to be a "strong but imperfect" measure of behavior.*

Limitations

- The three pilot organizations are all large, well-established in their discipline and predominantly white institutions, so it is not certain that the behaviors of their audience members would apply to organizations with a different profile.
- The three organizations were selected because they had a robust number of surveys in their database and because survey responses were linked to their ticketing databases. [APPENDICES 3 and 4]
- The analysis was completed before the COVID-19 pandemic, with its resultant economic hardships, and the urgent conversations about racial justice, all of which has led arts organizations to examine their current business practices and mission.

**See: Consumer Insights: Findings from Behavioral Research, chapter 30, "Purchasing Intentions and Purchases," Marketing Science Institute, 2011, Vicki G. Morwitz.*

**“THIS HAS HELPED US
BECOME BETTER
MARKETERS. WE WENT
AFTER THE LOW-
HANGING FRUIT!”**

*—Jenny Gargaro, director of advertising, Goodman Theatre, on their use of
post-performance survey data*

TABLE OF CONTENTS

Executive Summary	6
Detailed Analysis	8
Case Study: Pacific Northwest Ballet	29
Takeaways and Considerations	36
Appendices	39

Executive Summary

- **The single-ticket buyers who said they were most likely to return were more likely than others to *actually* return.** 49% of the STBs in this group returned in the following two years.
- **The reported enjoyment and strength of the overall experience was also associated with actual return, though not as strongly as the stated intention to return.** 40% of those who said they found the performances extremely enjoyable returned in the following two years.
- **Those who say they will definitely return buy twice as many tickets in the following two seasons compared with those who state a lower intent to return.**

Total number of survey responses studied: 31,032

Executive Summary (con't)

- **Among the single ticket buyers who said they would definitely return, those who *actually* returned versus those who did *not* return were:**
 - **More likely to be older.** Actual return is highest for single ticket buyers who are 65 or older—and lowest for single ticket buyers who are younger than 45.
 - **More likely to become aware of the performance by receiving communications from the arts organization itself, or by going to the arts organization's website, as opposed to getting information from publications or other media.** This suggests there already may be engagement with the organization.
 - **Fairly similar in their enjoyment of the performance and overall experience.** What they liked and disliked about the performances did not vary much.
- **Results were remarkably similar for all three organizations in this pilot study.** The consistency of the finding linking intent to return and actual return across the three organizations suggests other organizations might benefit from using this information to bolster their own marketing efforts. [APPENDIX 6]

DETAILED ANALYSIS

Criteria for Selecting Goodman, Lyric and Pacific Northwest Ballet as Pilot Organizations

- Excellent survey Database
- Sizable volume of post-performance surveys for the 2015-2016, 2016-2017, and 2017-2018 seasons
 - Total number of survey responses studied: 31,032 [APPENDIX 3]
- Provided (or could provide) coded performance data
- Surveyed most or all productions or performances
- Survey results were tied to ticketing databases
- High interest on part of the staff of the arts organizations involved in conducting the surveys and analyzing the results

**Key Finding:
The Strength of a Ticket
Buyer's Intent to Return Was
Closely Correlated with
Actual Return**

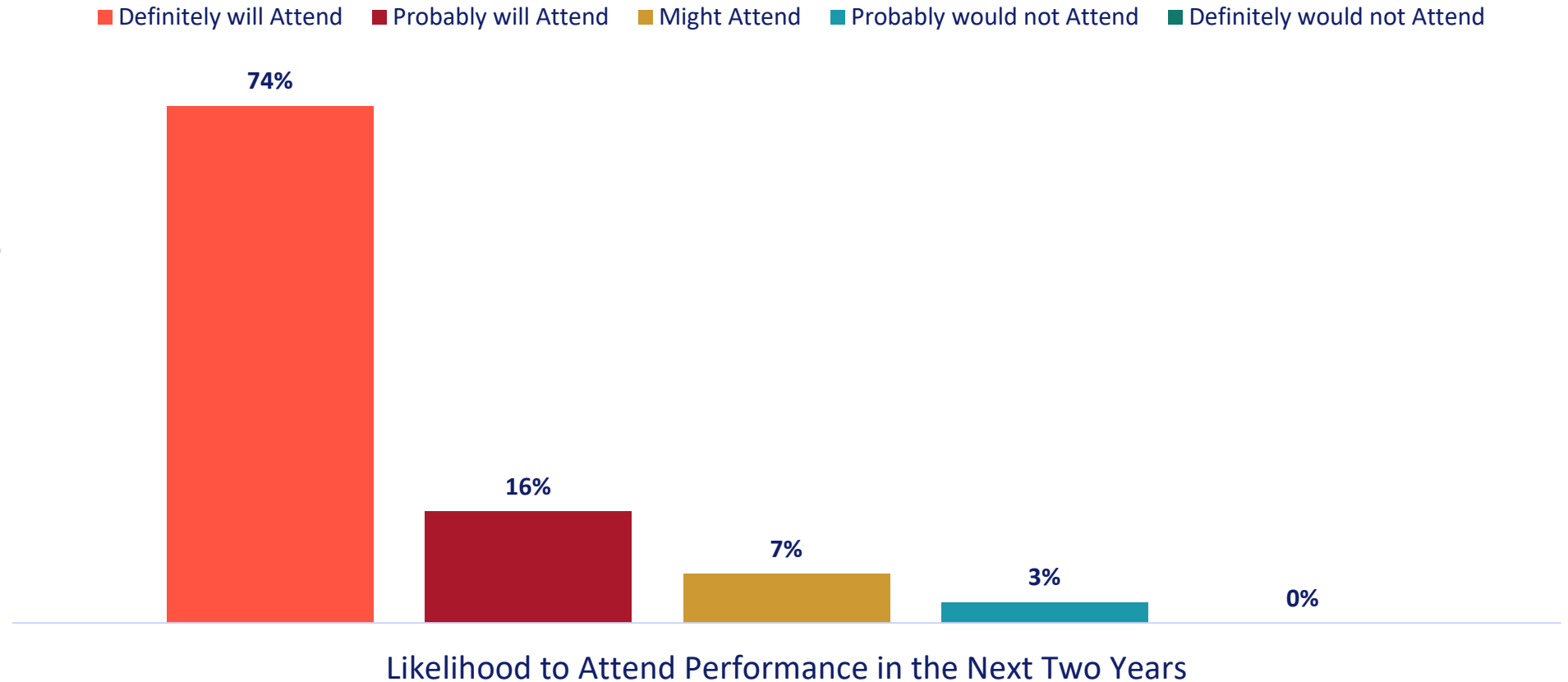
Intent to Return Was Strongly Associated with Actual Return

- Across the three pilot organizations, 49% of single ticket buyers (STBs) who said they would “definitely” return did return within the next two years
- Additionally, 31% of those who said they would “probably” return did return within the next two years*
- The pattern is similar for all three organizations [APPENDIX 5]

**Respondents to the survey were asked to describe the likelihood they would return to another performance within the next two years, choosing from a 5-point Likert scale: definitely will, probably will, might, probably will not, definitely will not. [APPENDIX 6]*

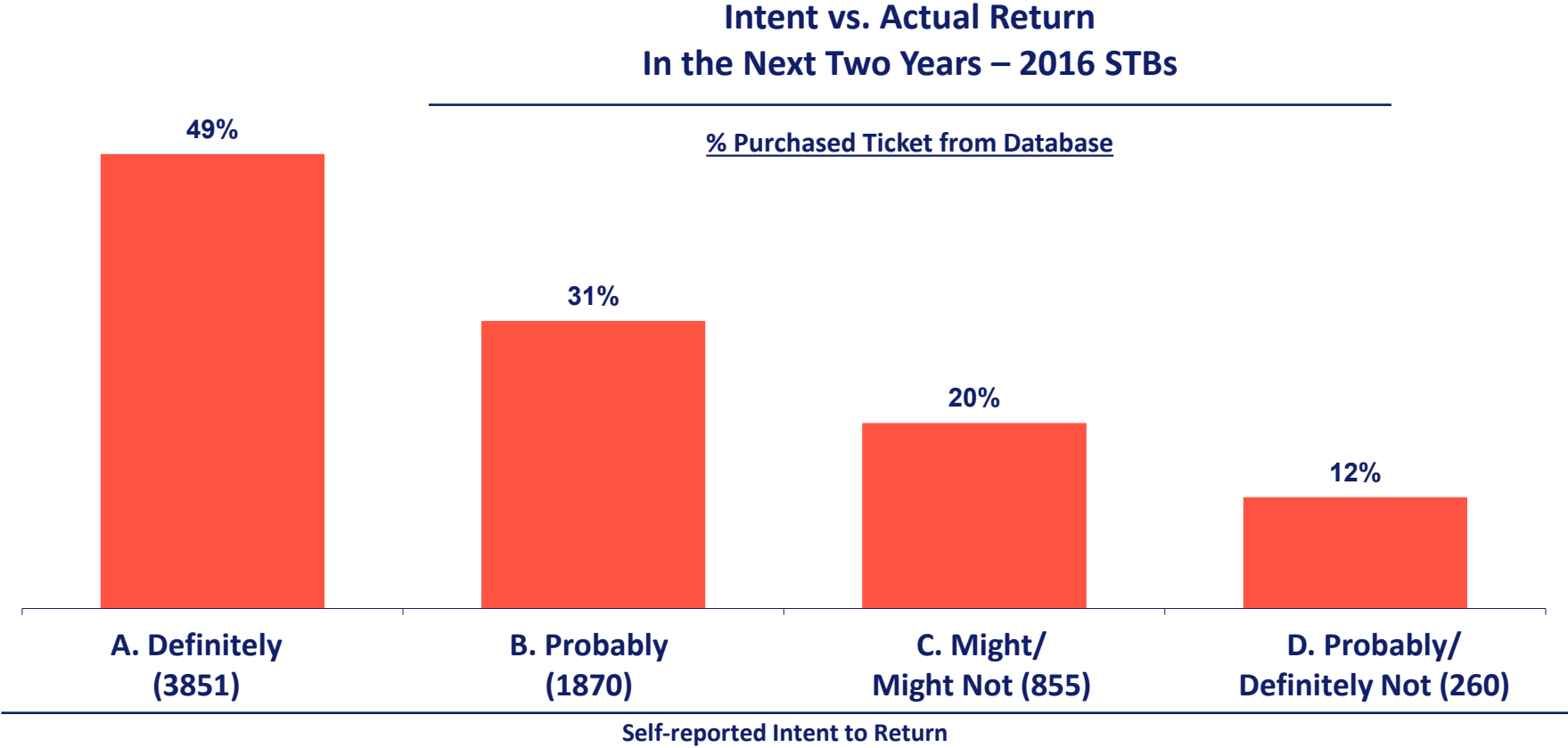
A Large Majority of Pilot STBs Surveyed *Said* They Were Likely to Return

Note that people who respond to audience surveys are more likely to skew positively toward the organization to begin with.



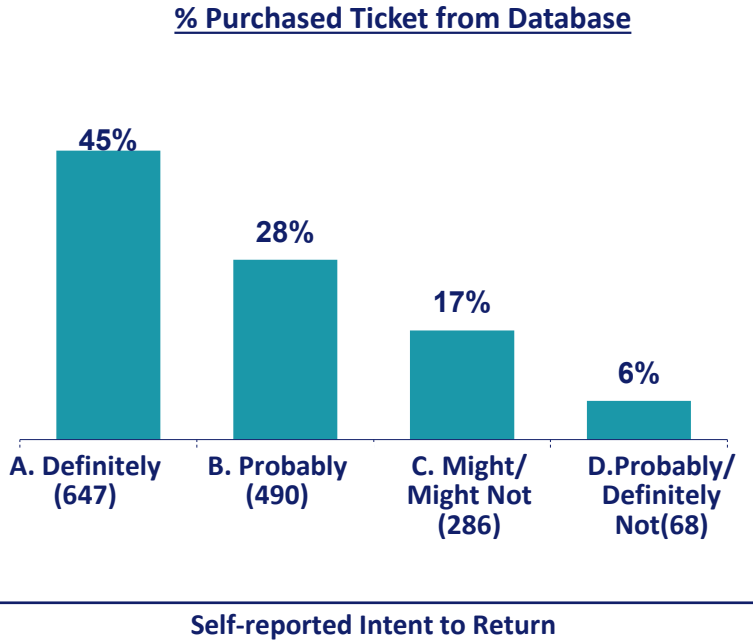
The Stronger the *Intent* to Return, the Greater the *Actual* Return

Across the three organizations, those who indicated they would “definitely” return were more likely to return.

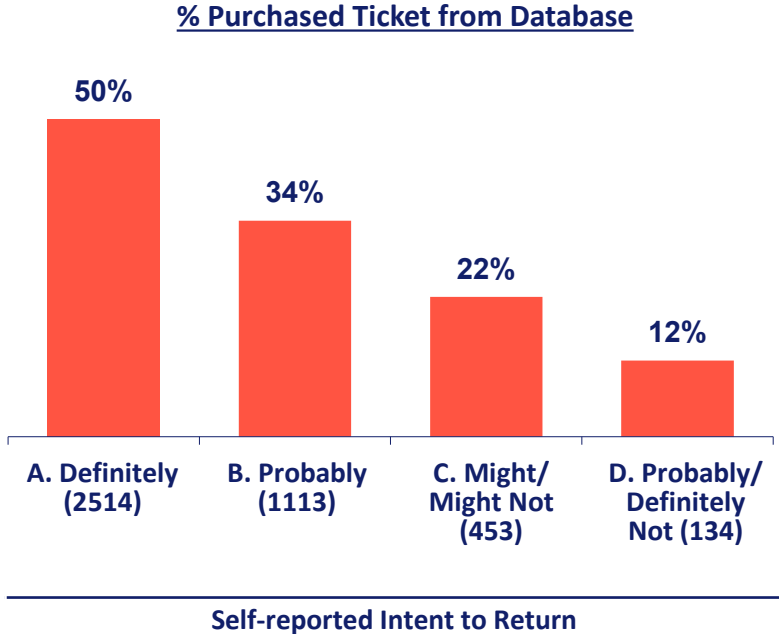


This Pattern Was Remarkably Similar Across all Three Organizations

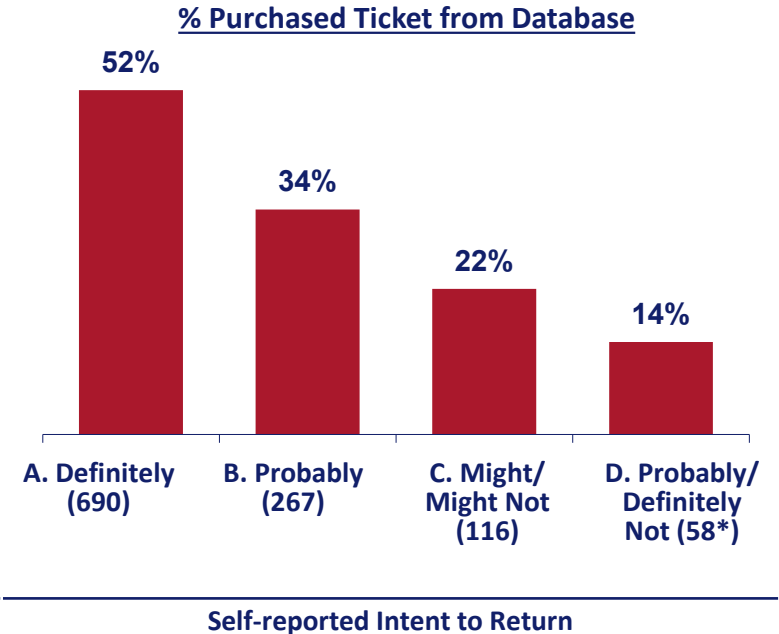
Intent vs. Actual Return in the Next Two Years – **Goodman STBs**



Intent vs. Actual Return in the Next Two Years – **Lyric STBs**

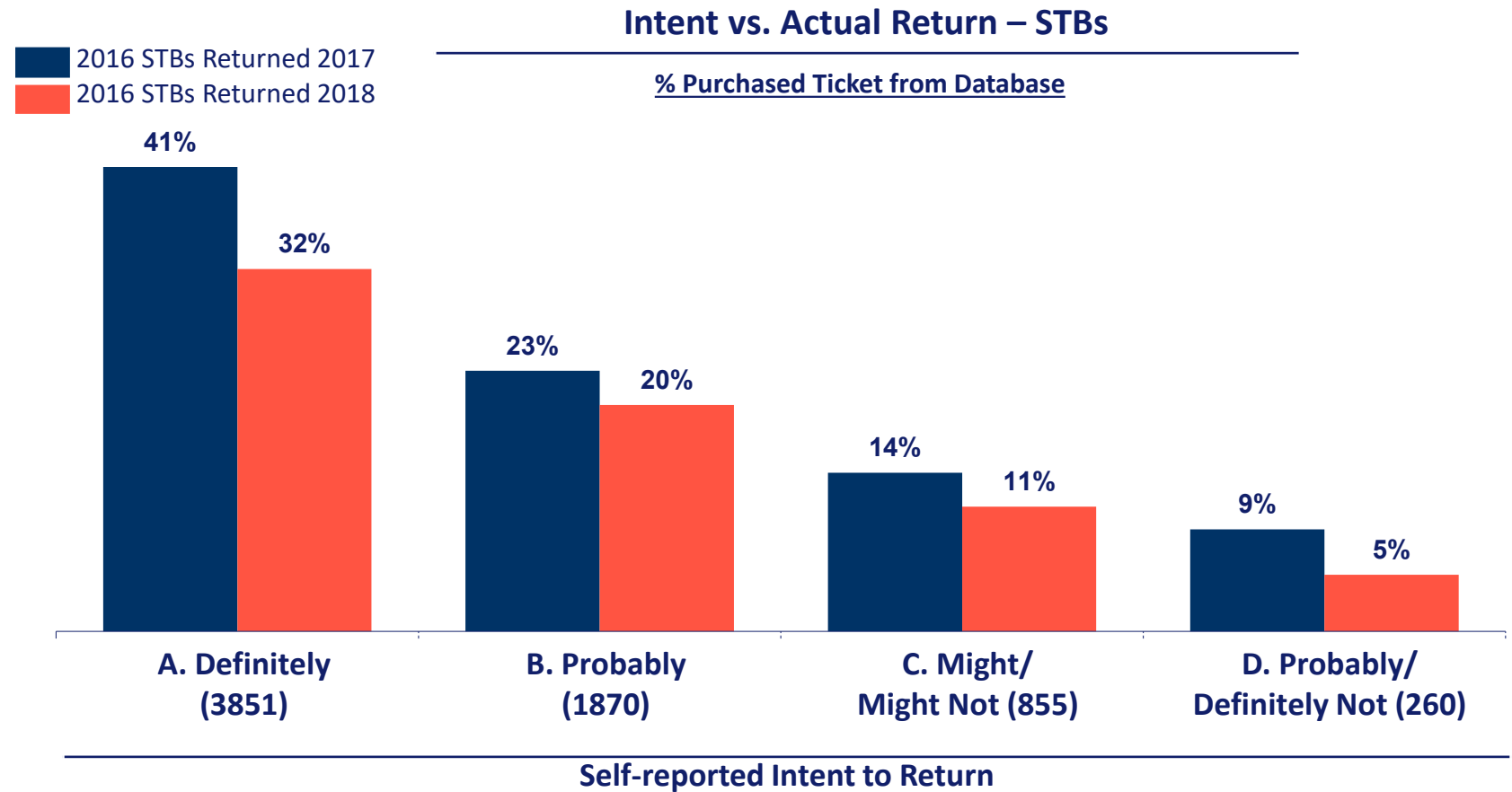


Intent vs. Actual Return in the Next Two Years – **PNB STBs**

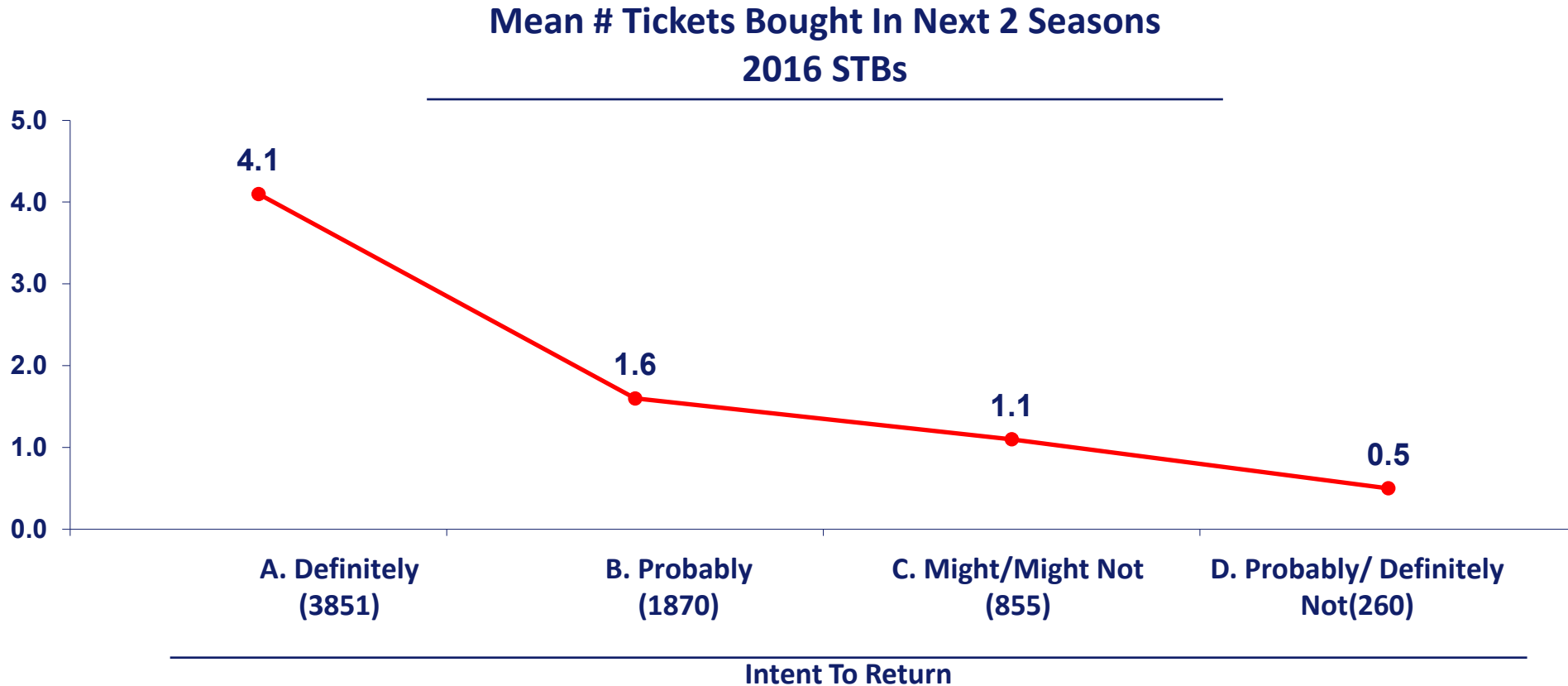


Return Was Strongest Within One Year of Attending a Performance

Single ticket buyers in the pilot organizations returned in the greatest numbers the first year and in lesser numbers the second year

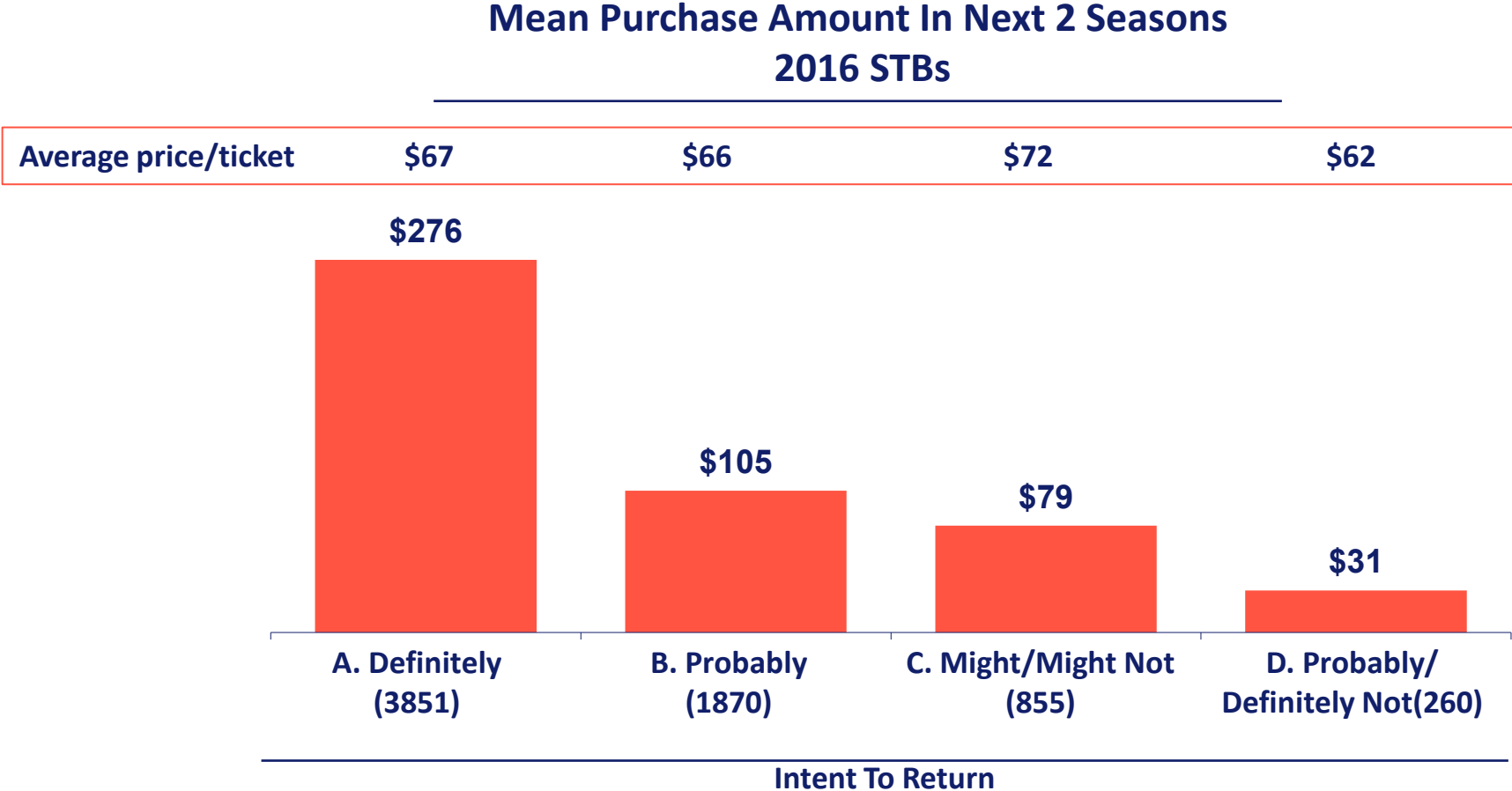


Those Who Said They Would Definitely Return Bought More Tickets



Those Who Said They Would Definitely Return Spent More Money

Pilot STBs who say they'll definitely return spent more than twice as much in total on tickets in total on tickets than the other groups, but the average amount spent per ticket is similar for all groups.



On responding to audiences...

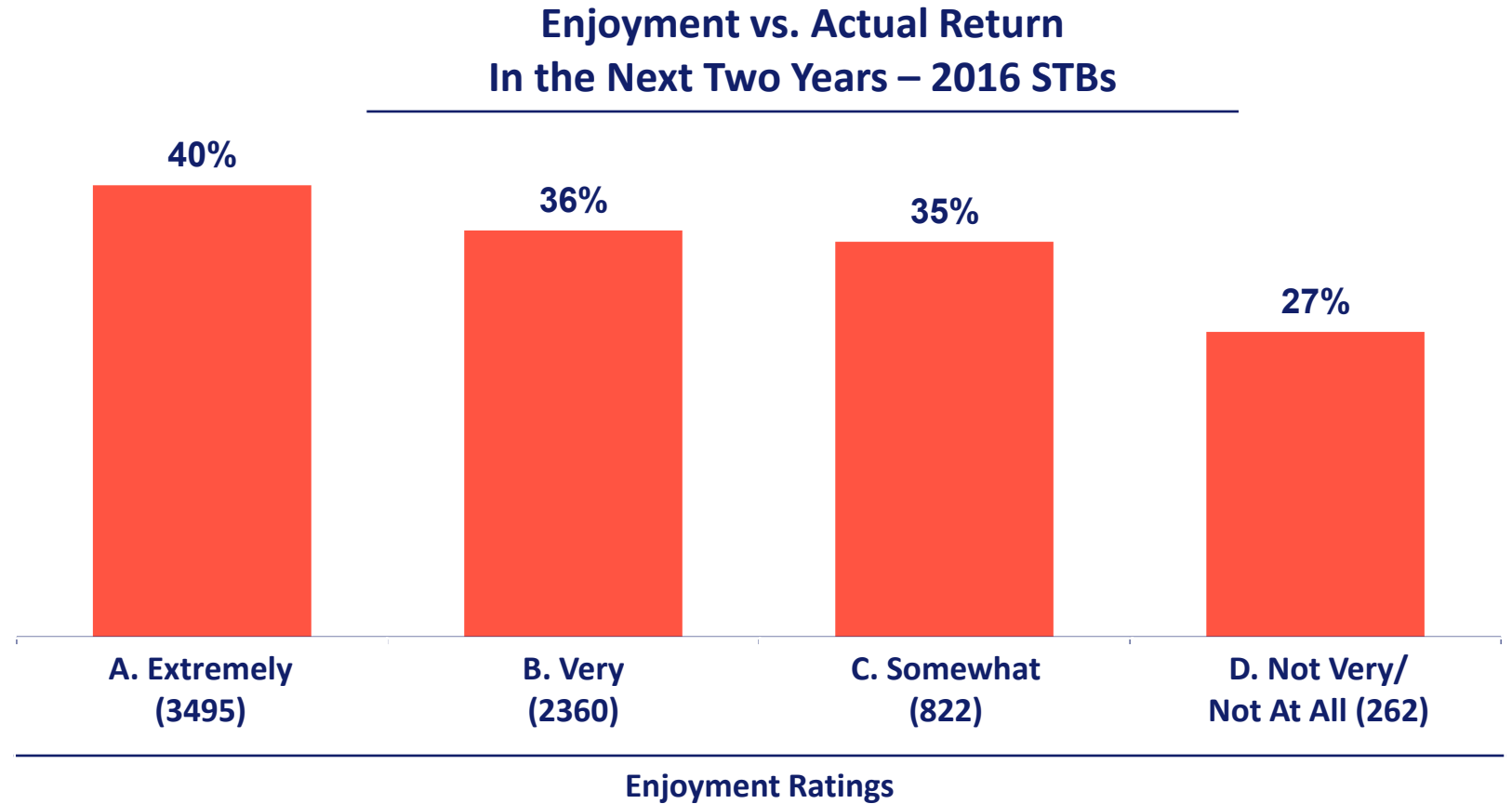
Jenny Gargaro, director of advertising at the Goodman Theatre, says the theatre had already been targeting single ticket buyers who said they would definitely return, and that they sent more communications to this group within a year of their response on the post-performance survey.

“We focus our marketing efforts, especially more expensive physical marketing mailers, on the most recent attendees,” she said. “We get a higher return on them. That’s why we say it’s the low-hanging fruit. It also allows us to have more confidence.”

Other Notable Findings

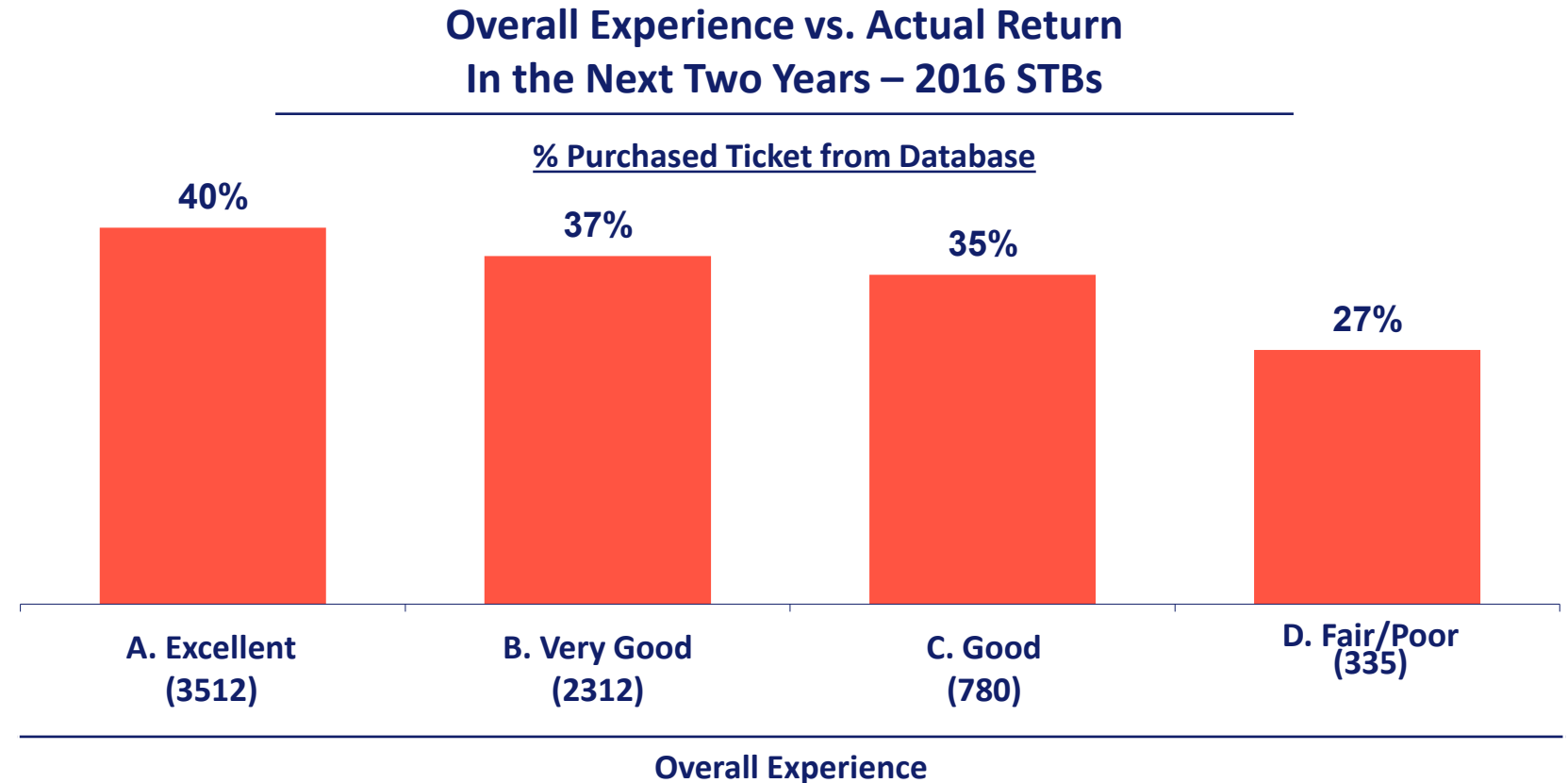
Performance Enjoyment Is Associated with Actual Return, but to a Lesser Degree

Single ticket buyers who said they enjoyed a performance returned at slightly greater numbers than those who did not enjoy it. The relationship is not as strong as intent to return versus actual return, in part because the Goodman Theatre showed no relationship between enjoyment and return.



Quality of Experience Is Associated with Actual Return, But Not as Strongly as Intent

Single ticket buyers who said they had an excellent or very good experience returned at slightly greater numbers than those who did not. The relationship is not as strong as intent to return versus actual return, in part because the Goodman Theatre showed no relationship between overall experience and return.



What Attendees Like Does Not Vary Much

2016 STBs
Who Said Definitely Will Return

Among single ticket buyers who said they would definitely return, positive comments were similar whether they returned or not.

Returned

performance
great costumes loved good
production excellent music staff
opera show wonderful seats dancing
beautiful theater play sets helpful well quality
amazing enjoyed performances orchestra set staging
always love new friendly ballet one dancers time choreography like
intermission goodman singing acting really experience stage seat ushers
theatre outstanding nice parking

Did Not Return

performance
great seats show staff
costumes theater beautiful good
wonderful production excellent loved
helpful well friendly enjoyed music play theatre
seating experience sets quality dancing set new
performances love dancers comfortable tickets always ushers really
parking ballet everything about seat orchestra amazing goodman opera
choreography like easy one cast staging

What They Dislike Is Similar, Too

Among single ticket buyers who said they would definitely return, negative comments were similar whether they returned or not as well.

2016 STBs Who Said Definitely Will Return

Returned

performance long
time people intermission
opera parking seats during
show good line first experience
understand many hard lines one before
garage floor little better just front ticket about
like seat great bit much know after back well ballet
think problem nothing row times traffic really act play
difficult production music

Did Not Return

performance long
seats parking time people
seat great experience
understand intermission nothing
show first line good like one everything
hard after garage balcony little during row
opera better bit thought accent think theater
difficult before tickets stage act other much just lyrics
really dancers seemed two problem 2 play problems

On responding to audiences...



Lia Chiarelli, chief marketing and advancement officer at the Pacific Northwest Ballet, said that she and her colleagues read the post-performance survey comments carefully and responded rapidly, when possible, because they found making changes could build their relationship with the audience members and encourage return.

“Some of the comments were complaints and we really looked at those,” she said. “We adjusted quickly to improve the experience because we know that helps.”

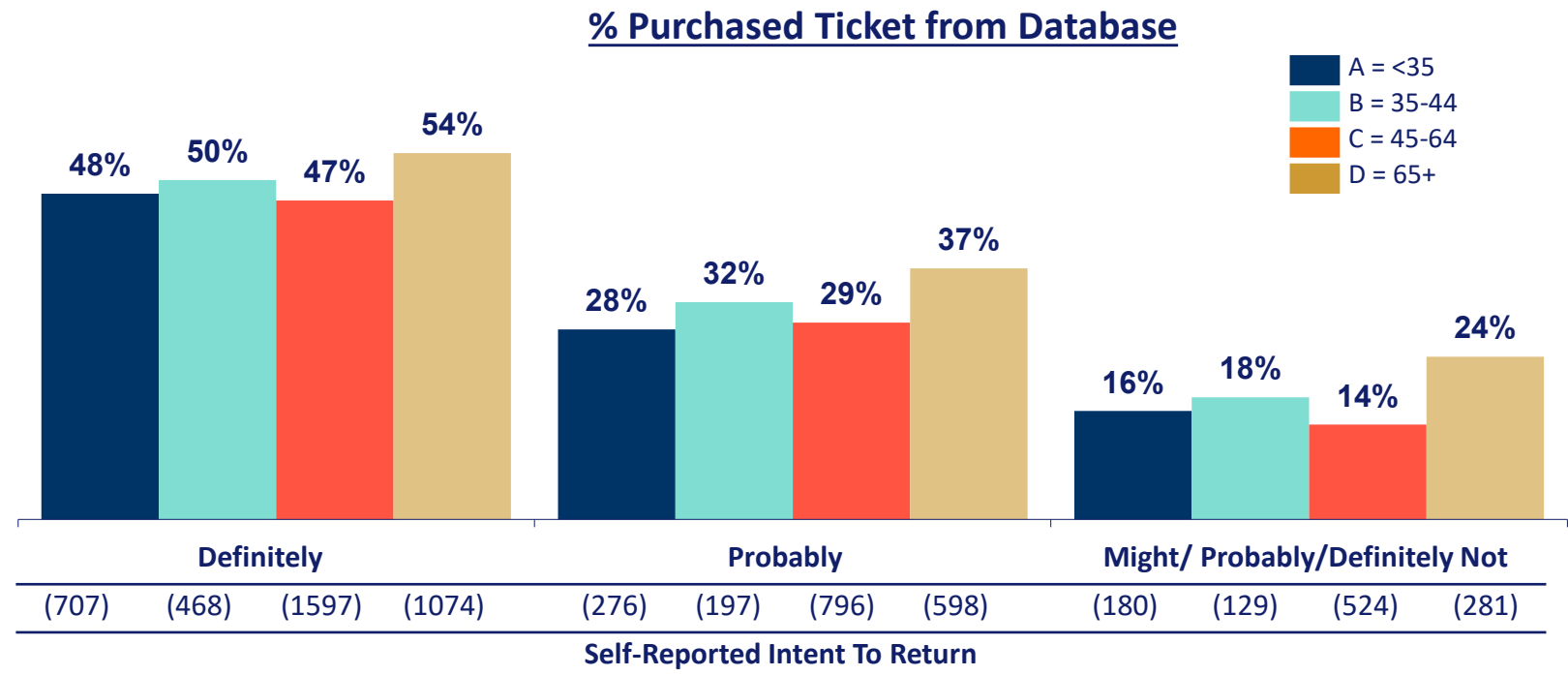
Using Experience and Enjoyment Data

- While experience and enjoyment data do not explain why some people return and some do not (among those who said they would “definitely” return), staff at the pilot organizations indicated that this data was helpful to see
- Some marketing staff said they could use the data to change things they could control about the experience (parking, refreshments, comfortable seating)
- Particularly useful was a comments section, where audience members were asked to write in suggestions, compliments and complaints, giving the organizations the chance to respond personally or make quick changes
- However, the organizations were skeptical about making large investments in the overall experience to encourage frequent attendance, given that there were no notable differences in what motivated actual return versus no return

Strength of Intent to Return Was Associated with Actual Return in All Age Groups for STBs

Single ticket buyers 65 and over, not surprisingly, have slightly higher rates of return overall and among those who say they will definitely return.

Intent vs. Actual Return In the Next Two Years By Age 2016 STBs



How STBs Heard About Performances Is Associated with Likelihood to Return

Among those who said they would definitely return, those who receive communications from the organization (email, postcards, mailings) or who visit the website were more likely to return than those who saw notices in the media. While the data here is for Lyric, the pattern was the same for all three pilot organizations.

Sources of Awareness Among 2016 STBs Who Said Would Definitely Return

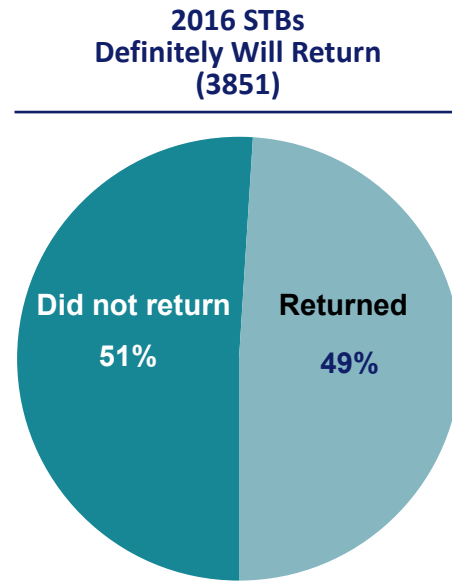
	Returned [†] (1902) %	Did Not Return (1949) %
<u>Grantee Communications</u>	<u>77</u>	<u>58</u>
Grantee website	37	29
Postcard/brochure in mail	36	24
Grantee email	31	21
Grantee e-newsletter	9	5
Lyric Opera News	3	2
<u>Media</u>	<u>48</u>	<u>53</u>
Print article	23	25
Print ad	19	18
Online ad	12	12
Online events calendar	10	11
Radio	9	9
TV ad	6	7
TV	4	5
Outdoor media	2	2
Online search	1	1
<u>Word of Mouth</u>	<u>33</u>	<u>38</u>
Social media	21	22
Family/friend recommendation	16	21

† Returned in either 2017 or 2018

From Returnee to Donors and Subscribers

18% of those who said they would definitely return ended up becoming subscribers. While the data here is for Lyric, the pattern was the same for all three pilot organizations.

Who Comes Back and Who Doesn't



	Returned [†] (1902) %	Did Not Return (1949) %
<u>Age</u>		
<45	33	33
45-64	40	44
65+	27	23
<u>Mean</u>		
	<u>52</u>	<u>51</u>
Children <18	17	18
<u>Ethnicity*</u>		
Caucasian/White	85	83
Asian	6	5
Hispanic/Latino	5	6
African-American/Black	4	5
<u>Gender</u>		
Male	30	27
Female	70	72
<u>Organizational Relationship</u>		
Made a donation** (2014-2018)	33	12
Lapsed Subscriber** (2014/2015)	8	2
Future Subscriber** (2017/2018)	18	0

*Could choose more than 1 option

**From database

† Returned in either 2017 or 2018

CASE STUDY:

**How The Pacific Northwest
Ballet Attracts Younger
Audience Members**

Wooing Younger Audiences to the Ballet

- Younger audiences for ballet have over the years been declining
- So PNB staff decided to focus its marketing on this group, which it defined as audiences ages 25-40
- They created a group called “The Pointe,” specifically for this audience



“Get The Pointe”

- Staff combed through comments on the post-performance surveys to try to enhance the experience of performances for those in this target group
- They sent members of The Pointe a regular stream of emails and communications guided by the data, offering ticket discounts and invitations to events like Beer and Ballet Night

Get The Pointe.

PNB
301 Mercer Street
Seattle, WA 98109

Non-Profit Org.
U.S. Postage
PAID
Pacific Northwest Ballet

LOVE A GREAT DEAL? US TOO!

That's why we're inviting you to *The Pointe*,
PNB's opt-in email list for arts and dance lovers ages 20-40.

① Membership is free and easy,
sign up here: pnb.org/thepointe

② Then watch your inbox
for occasional emails.
Offers will include \$15 tickets, half-off super sales, and
behind-the-scenes opportunities to get to know PNB a
little better.

SAVE THE DATE 8.11.16
SUMMER AT SAM: SCULPTURED DANCE
PNB & Seattle Art Museum present a special evening of free dance and sculpture
at the Olympic Sculpture Park with works by Kiyon Gaines & Ezra Thomson (PNB),
Donald Byrd (Spectrum Dance Theatre), Olivier Wevers (Whim W'Him) and Kate Wallich.

xoxo,
PNB

“We adjusted The Pointe based on the surveys and focused on who they showed us were those most likely to return,” said Lia Chiarelli. “It was worth investing in them. The surveys made us more intentional about what we were doing with our marketing. It affected who we invited to join us and how we invited them.” She said that the intent to return among this group rose over the duration of the BAS grant.

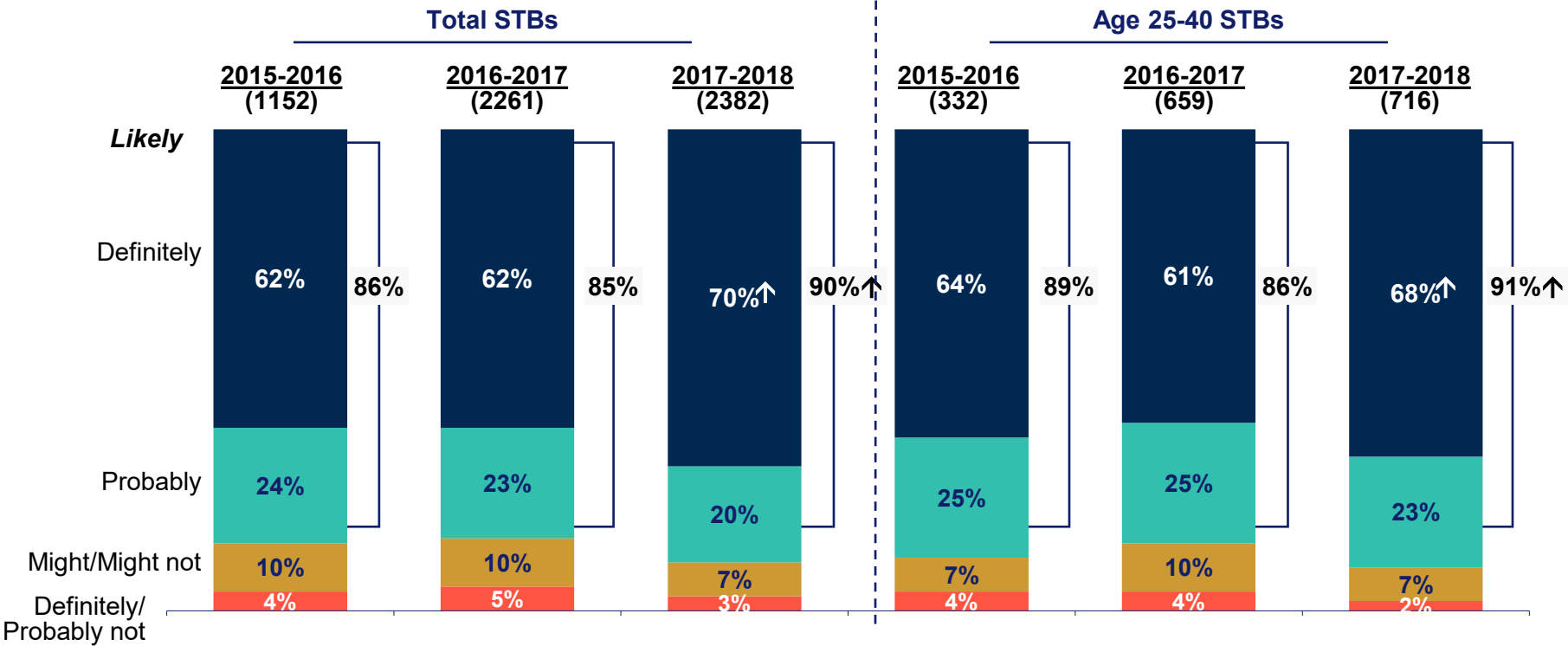
The result is that “we tend now to do fewer blanket email blasts. We tend to send to people that the data suggests are more likely to be interested and to follow up with.”



Tracking the Age Factor

Intent to return strengthened in 2017-2018 among STBs overall and among 25-40 year old STBs.

Likelihood to Attend PNB Performance In Next Year or Two



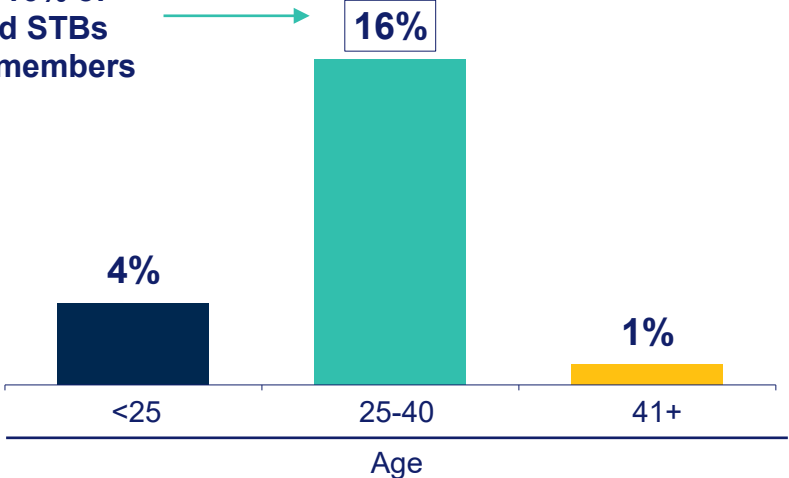
↑ = Significantly higher than previous season at the 90% confidence level.

Intent to Return Was Stronger for Members of The Pointe than for Others 25-40

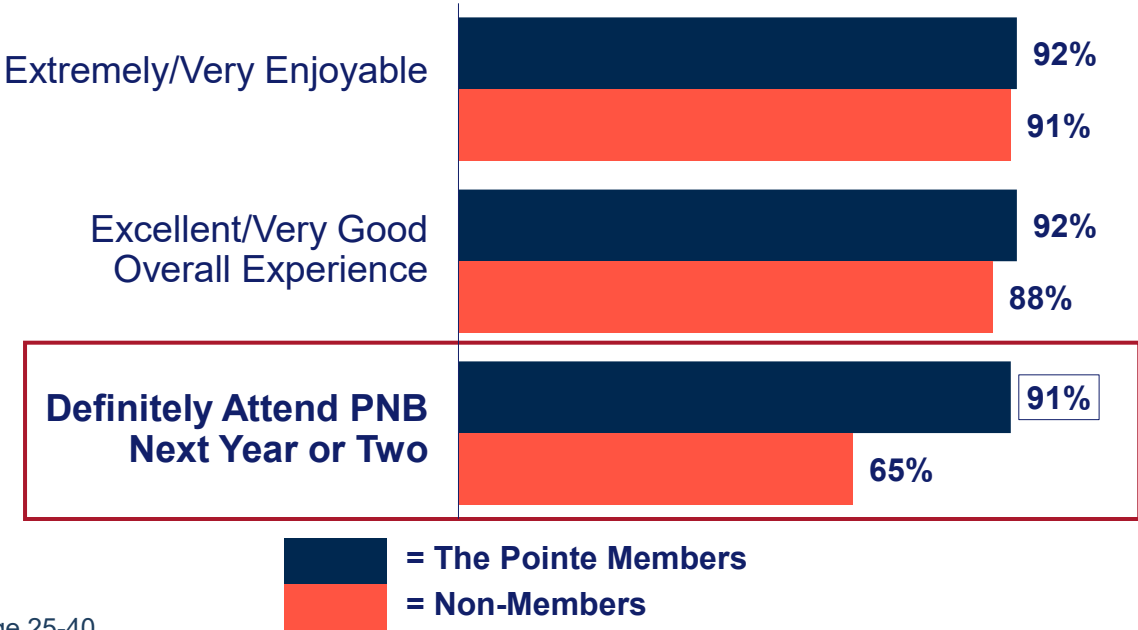
Although the two groups are similar in their enjoyment and overall ratings of the experience, intent to return is stronger for members of The Pointe than for others in the target age group.

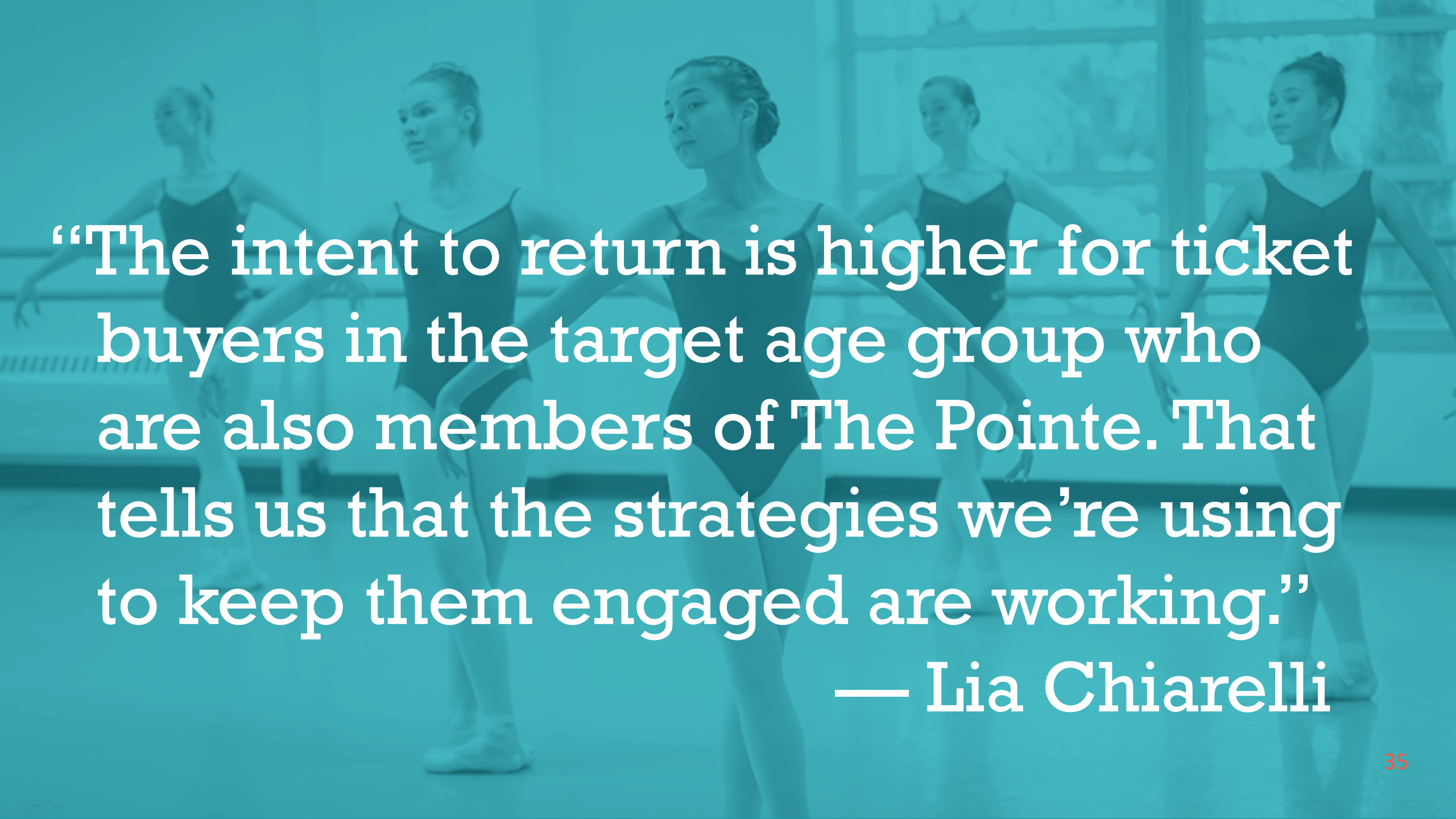
The Pointe Current Membership[‡]

In 2016-2017 16% of 25-40 year old STBs were Pointe members



*Current members of The Pointe's Members include some members who are not age 25-40.
[‡] From PNB database
 □ = Significantly higher than other group at the 90% confidence level.





“The intent to return is higher for ticket buyers in the target age group who are also members of The Pointe. That tells us that the strategies we’re using to keep them engaged are working.”

— Lia Chiarelli

TAKEAWAYS and CONSIDERATIONS

Key Takeaways from the Pilot Study

- Single ticket buyers who say they will “definitely” return are more likely to *actually* return than those who say they’re less inclined, based on this data. About half of those who said they would return actually did in the following two seasons.
- Single ticket buyers who say they’ll return come back in greater numbers the first year after they’re surveyed, lesser in the second year.
- Single ticket buyers who return are likely to be older, with the largest returning age group being audience members 65 and older.
- Communications from the organization itself are more likely to be correlated with actual return than communications from other sources.
- Surveys linked to ticketing databases can help organizations see if their return patterns are similar to those in this study and create potential marketing opportunities.
- Surveys can also give staff a window on what audiences are thinking after the performance, making quick messaging adjustments possible.

Considerations for Examining and Using Post-Performance Survey Data

- In the pilot study, roughly half of the people who say they will “definitely” return do...and half do not. Of those who say they “probably” or “definitely” *will not* return, 12% do come back. Think about whether this is a reliable basis for strategic marketing or what you might want to see in your own data.
- If using a subset of the “definitely” return group as a target, consider its potential size. For example, if targeting younger audience members (those least likely to return by age), ensure you have enough people in your database for a successful return on investment.
- When comparing those who say they will “definitely” return with those who don’t, it helps to take into account existing relationships with your organization. For the pilot organizations:
 - Those who said they would return and did were more likely to hear about performances through the organization’s own media channels, suggesting at least prior knowledge of the organization
 - Those who said they would return and did were more likely to have purchased tickets or made a donation in years prior to those in the analysis, suggesting a level of engagement from the start
- If using survey data to segment and market to specific audiences, it is important to state the purpose of your survey up front, along with your privacy policy that covers how you will use people’s personal data.

APPENDICES

APPENDIX 1: BACKGROUND ON INITIATIVE AND DATA

- The Wallace Foundation, based on its years of experience working with arts organizations, launched the Building Audiences for Sustainability (BAS) initiative from 2015 to 2019.
- The initiative provided funding to 25 performing arts organizations to learn together whether they could attract new audience segments while strengthening relationships with current ones, and whether their efforts could contribute to financial health.
- Organizations designed and implemented their individual audience-building projects in an iterative continuous learning process, using data and market research to analyze their approach and make changes where needed.
- As part of their research, the organizations conducted post-performance audience surveys over a three-year period to help determine whether they were on track with their audience-building goals.

APPENDIX 2: THE THREE PILOT ORGANIZATIONS



The Goodman Theatre, established in 1922, is Chicago’s oldest and largest not-for-profit theater and it produces classic and contemporary works. The theater’s artistic priorities include new play development (more than 150 world or American premieres), large scale musical theater works and reimagined classics.



The Lyric Opera was formed in 1954 and operates a 3,563-seat theater, second in capacity only to New York’s Metropolitan Opera in North America. In addition to producing classical performances throughout the year, The Lyric Opera provides talented new singers with training and experience through its professional artists development program. In its Lyric Unlimited program, it has introduced new audiences to opera with programming for young people and in collaboration with community organizations, also commissioning and presenting new works.



The Pacific Northwest Ballet, one of the largest ballet companies in the United States, was founded in 1972. It has nearly fifty dancers and presents more than 100 performances each year of full-length and mixed repertory ballets at Marion Oliver McCaw Hall in Seattle and on tour.

APPENDIX 3: NUMBER OF SURVEY RESPONSES PER YEAR

	Lyric Opera	PNB	Goodman Theater	Total
2016	8,086	1,844	2,342	12,272
2017	6,880	1,811	1,775	10,466
2018	5,266	1,824	1,204	8,294
Total	20,232	5,479	5,321	31,032

Number of post-performance survey responses for each organization, by year.

**Note: Numbers were weighted in the analysis because to balance for Lyric Opera's large database.*

APPENDIX 4: LINKING SURVEYS TO DATABASE

- To link surveys to patron databases, it is in most cases necessary to use a premium version of survey programs. The BAS organizations all upgraded to the paid Survey Monkey subscriptions.
- The premium survey program creates an individual web page for each email address, allowing the responses to be tracked to the individual ticket buyer.
- Linking to the database improves the survey experience because it allows organizations to ask fewer questions about the performance they'd just seen.
- Linking to the database allows for deeper analysis, such as the one conducted in this pilot study, by connecting responses about the performance to purchase history, donations, etc.
- It also allows for people to report their own personal data (age, ethnicity, etc.), which is thought to be more reliable than information from purchased audience lists.
- It is important to send a note to recipients stating what sort of personal information you will collect and how it is appended to the database and used. You should also state whether it will be used for marketing or shared with other organizations.

APPENDIX 5: SIMILAR FINDINGS ACROSS ORGANIZATIONS

Finding	
1. Intent to return is strongly associated with actual return.	Same for all 3 organizations
2. This is true for STBs overall and for first time attendees.	Same for all 3 organizations
3. STBs who say they definitely will return <u>and</u> return are somewhat older than those who said they would return and did not.	Most evident for Goodman, less so for Lyric, no difference by age for PNB
4. Among STBs who said they definitely would return, the ethnic profile for returnees and non-returnees is similar.	Same for all 3 organizations
5. Past attendees, especially more frequent attendees, have a greater propensity to return compared to first time attendees (among STBs who said they definitely would return).	Same for all 3 organizations

APPENDIX 5: SIMILAR FINDINGS ACROSS ORGANIZATIONS (CON'T)

Finding	
6. Grantee communications are more frequent sources of awareness among STBs who said they definitely would return and did return compared to those who did not return.	Same for all 3 organizations
7. Among STBs who said they definitely would return, performance enjoyment and the overall experience are similar or stronger for STBs who did not return compared to those who did return.	Same for all 3 organizations
8. The majority of 2016 STBs had <u>not</u> bought a ticket in the previous two seasons.	Same for all 3 organizations
9. Previous attendance is strongly linked to future attendance.	Same for all 3 organizations

APPENDIX 6: THE LIKERT SCALE

- Respondents to the survey were asked to describe the likelihood they would return to another performance within the next two years. They were asked to choose one of five descriptions of that likelihood:
 - definitely will attend
 - probably will attend
 - might attend
 - probably would not attend
 - definitely would not attend
- This system is called a five-point Likert scale, named for its inventor, the American social scientist Rensis Likert, who devised the approach in 1932. The Likert scale is the most widely used approach to scaling responses in quantitative survey research since they give respondents a fixed range of answers and create easily compared data on a common scale.