

research into
action

pathways to new opportunities



Philadelphia Live Arts Festival – William Hebert



About us

The Greater Philadelphia Cultural Alliance is committed to advancing the region's cultural sector and making Greater Philadelphia one of the foremost creative regions in the world. The Cultural Alliance also serves as a vital resource to over 375 member organizations.

Since 1972, the Cultural Alliance has provided advocacy, research, and policy services for the field; built audiences and increased earned income for arts and cultural institutions through collaborative marketing programs such as Phillyfunguide and Funsavers; provided access to group health insurance and other discounted business services for its members; and distributed grants to support innovative community-based arts projects and to assist organizations during the recent economic crisis.

Complete information on the Cultural Alliance's activities is available at www.philaculture.org. The Cultural Alliance is an independent nonprofit 501c(3) organization.

Research into Action: Pathways to New Opportunities is part of Engage 2020, the Cultural Alliance's research and marketing initiative aimed at doubling cultural engagement in Greater Philadelphia by 2020. Engage 2020 focuses on three key strategies:

- Conducting groundbreaking research on emerging trends in cultural engagement
- Providing seed capital and marketing support to cultural organizations for innovative planning and product development
- Applying new technology and building social networks in the cultural sector



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Peggy Amsterdam, President

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Research into Action: Pathways to New Opportunities represents the culmination of two years of qualitative and quantitative research by the Cultural Alliance and others on consumer cultural engagement. As the title indicates, we believe these findings represent important new pathways for expanding cultural participation and building the next generation of cultural consumers.

Despite the many challenges facing cultural organizations in the early 21st century, our research points to multiple opportunities to grow arts participation. More than ever before, consumers are looking for new ways to engage creatively. Research provides us with the ability to assess emerging cultural practices, shifting demographic patterns, and barriers to wider participation. This is a critical first step in building engagement and ensuring that culture continues to play a vital role in our region's vibrant civic life.

The next step is even more important and is one of action. We hope these findings provide a springboard for cultural organizations looking to build audiences and deepen engagement. As part of our Engage 2020 initiative, we too will be focusing on action — shifting from research into implementation by offering resources for cultural organizations looking to establish innovative new approaches to engage participants.

On behalf of the many contributors to and supporters of this publication, I want to thank you for reading *Research into Action: Pathways to New Opportunities*. With knowledge, artistic excellence, and creativity, together we can ensure that our future holds great promise.



Mary Meder, President

Harmelin Media

At Harmelin Media, we've long believed that culture is one of Philadelphia's defining strategic advantages. As one of the largest media buying agencies in the country, we know firsthand that our success depends entirely on the quality of employees we're able to attract and the creative environment we're able to offer them. So we're grateful to the Philadelphia arts and culture community for making our region, and all of us within it, stronger, more creative and more inspired.

That's why Harmelin Media is especially pleased to underwrite the publication costs of this report, *Research into Action: Pathways to New Opportunities*. We want arts organizations to have access to the same kind of cutting edge, timely research that our private sector clients use to develop their strategies. We know that 21st century consumers demand innovative, participatory experiences. If we're not innovative, we cease to be relevant. At the same time, innovation without information is exceedingly risky. In this economic environment, we need to be highly strategic, and we need market research about consumer trends, tastes, and demographic shifts to make smart choices.

That informed strategic approach guides all of Harmelin Media's work with clients both large and small, for-profit and non-profit. And that's why we're pleased to sponsor *Research into Action* — a report that we hope will contribute to the strategic planning discussions at all of your organizations. It's part of our investment in the cultural community that returns manyfold to all of us who live and work here.

table of contents

10 key findings	6
introduction	13
programming	25
increasing and improving access	35
marketing	49
10 implications	59
conclusion	68
appendix	70



10 key findings

Greater Philadelphia, like many regions in the country, is proud of the depth and breadth of its cultural offerings. Yet the reality is that many seats still go unfilled and many lives untouched. So why aren't we fulfilling our cultural potential, and what can we do about it?

Over the past two years, as the first step in our Engage 2020 Initiative, the Cultural Alliance has undertaken five separate pieces of research to uncover answers, to detect trends, and to map a path to a brighter future:

- Cultural Engagement Index
- Demographic Trends and Forecasts in the Philadelphia Region Study
- Culture & the Arts Survey
- Paid Patronage Study
- Engage 2020 Focus Groups



Conservation Center for Art and Historic Artifacts – Image courtesy of the Conservation Center for Art and Historic Artifacts

1) Philly scores well, but there's still room to grow

In 18 out of 20 cultural disciplines, Greater Philadelphia's cultural attendance rates were above the national average. However, even here, many residents still view arts attendance as a "special occasion" event, not a part of everyday life, and others never attend at all.

2) Our bucket is leaking

We are good at attracting customers, but not so good at keeping them. Traditionally, our industry has accepted "churn" at individual organizations, assuming that customers were simply migrating from one venue to another. It turns out that that is not the case. The Paid Patronage Study of 17 major organizations looked at churn within a broader community, and showed that 2 out of 3 new patrons did not return to ANY of the organizations studied in the 12 months following their purchase. There is a major opportunity to increase engagement simply by increasing our retention rate.

2 out of 3 new patrons did not return to ANY of the studied organizations in the 12 months following their purchase.

3) Personal practice is a gateway

Philadelphians are actively engaged in many forms of creative expression. The Cultural Engagement Index shows that, increasingly, it is participatory. There is a strong correlation between personal practice and attendance. For example, respondents who reported taking music lessons "at least once a month" were about 75% more likely than the average respondent to attend live concerts.

4) People of color are more engaged & growing in population

The Cultural Engagement Index shows that both African Americans and Hispanics were more culturally active than whites. This is particularly important, given that Greater Philadelphia's population is forecasted to grow by 550,000 between 2000 and 2020, and virtually ALL of that growth is projected to come from people of color.



CEI

Cultural Engagement Index

The Cultural Engagement Index is a measure of regional cultural engagement based on a consumer survey that asks questions about both personal practice activities (including creating music or dance, painting or drawing, writing in journals or blogs, and sharing photos, music or videos online) and questions about audience-based attendance in traditional cultural activities (including attendance at live performing arts, visiting museums, and attending community events).

By definition, the index sets a baseline of 100. Throughout this report we refer to how subsets of the population had responses above or below this overall average index of 100.



Fleisher Art Memorial - Aaron Stock

5) Family matters

Traditional wisdom has been that when a couple has children they drop out of the cultural system. The Cultural Engagement Index shows that tenet to be false. In fact, families with children have the highest engagement index of any life-stage cohort.

4 out of 5 of Philadelphians surveyed see the arts as vital to children’s social, intellectual and civic development. At the same time, less than half of them see arts organizations as “children-friendly.”

figure 2:

88% agree that “encouraging children to attend arts events enriches their understanding of the world.”

84% agree that “it is important to introduce children to the arts at an early age.”

39% of survey respondents agree that “most organizations are children-friendly.”

source: Culture & the Arts Survey

6) Role models are key

Adults who report having had mentors both inside *and* outside their family who introduced them to culture when they were children are more than twice as culturally engaged as those who had no role model.

7) Marketing is multi-channel

The average consumer is exposed to hundreds of marketing messages per day. Standing out in all that clutter can be daunting. Cultural marketers have to rely on a mix of marketing media to reach consumers and close the sale. According to the *Culture & the Arts Survey*, newspaper articles are the number one source of information for consumers, word of mouth is second, e-mail is third and newspaper advertising is fourth. Yet when consumers are asked how they wish to purchase tickets, the Internet is an overwhelming favorite. So, different communications channels are needed at different stages of the purchase process.

Despite shrinking circulation, newspaper articles remain the number one source of information for consumers.



Art-Reach – Image courtesy of Art-Reach

8) Product matters

The top two reasons people cited to attend a cultural event, ahead of both time and money, were personal interest in the event or personal interest in the genre. Everything starts with product. Yet focus group comments revealed that many people did not feel that the arts were consistently relevant to them personally, or felt that the experience was a letdown. Focus group responses were consistent with quantitative data that show consumers “dropping out” of the cultural community after just one experience as measured by the Paid Patronage Study, and relatively low attendance levels at professional performances as measured by the Cultural Engagement Index.

9) Social connection is a huge, undermarketed benefit

The explosion of social media (Facebook, Twitter, Yelp, etc.) is not an isolated or even new phenomenon. It is just the current, technology-enabled manifestation of our longstanding human need to connect with one another. Fortunately, the arts are ideally suited to fulfill this need. In fact, when the *Culture & the Arts Survey* asked Philadelphians about factors that influence their desire to attend a cultural event, three of the top four responses were social. Connection is central both to the experience itself (the way we share it with others) and to the way we learn about it (word of mouth). Both of these attributes are ripe for further development.

Connection is central both to the experience itself (the way we share it with others) and to the way we learn about it (word of mouth).

10) Service is central

An arts experience begins not when the turnstile clicks, but weeks before when it first occurs to someone to attend. When participants consider a cultural experience, logistics and welcome are both integral to their satisfaction. Information-gathering, ticket purchase, customer service, transportation, parking, safety, and even meeting up with people and deciding what to do afterwards are all part of the experience in the mind of the consumer.

Philadelphia Live Arts Festival. Photo © Jacques-Jean Tizrou / www.jltizrou.net





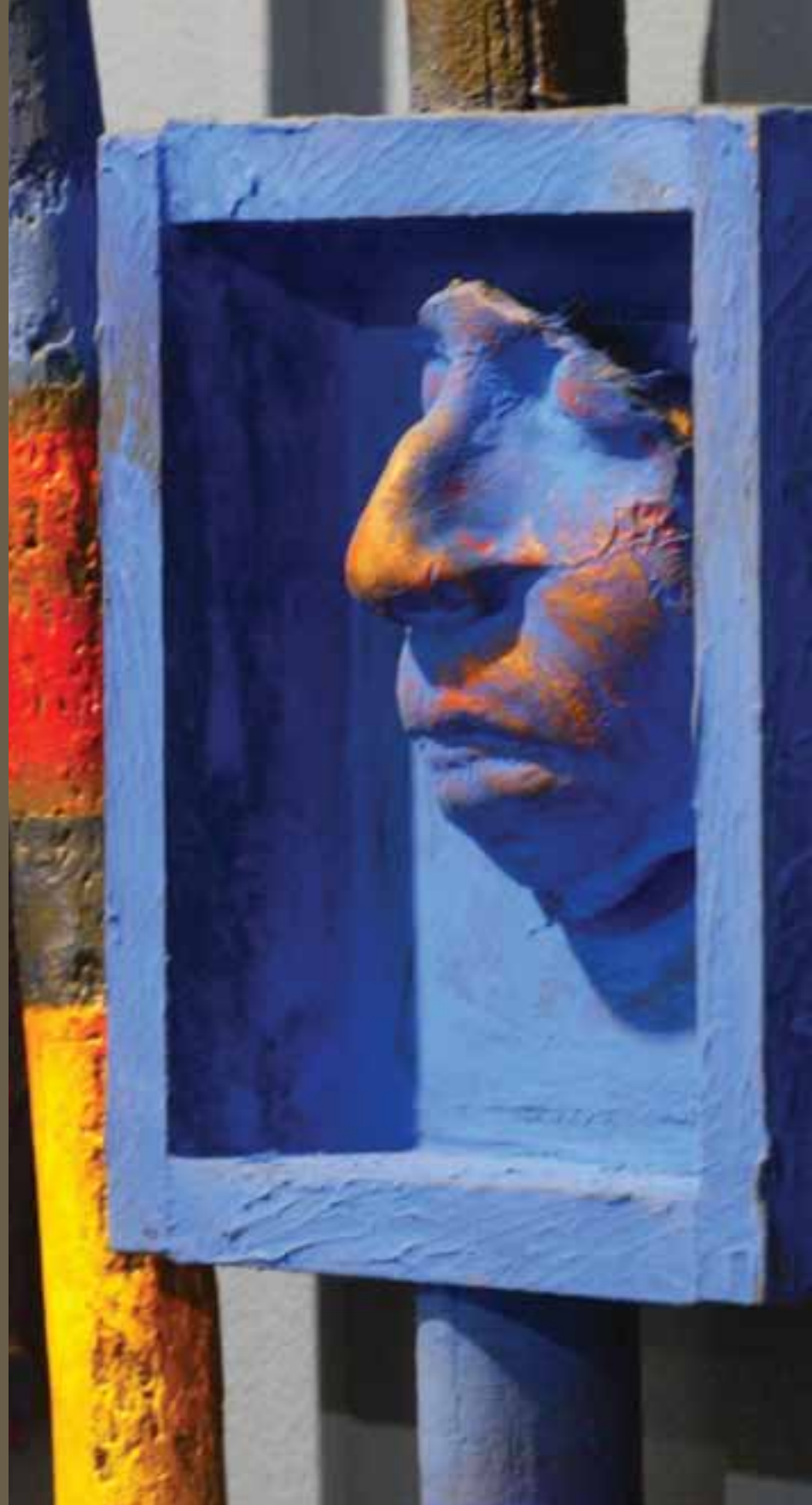
Please Touch Museum - Michael Branscom



We need to begin
by reframing our
mission from putting
“butts in seats” to
engaging people in
an experience.

introduction

In May 2008, the Greater Philadelphia Cultural Alliance announced an ambitious goal to double the region's cultural participation in a dozen years. Our plan, dubbed "Engage 2020," seeks to counteract a national trend of declining arts participation.*



* The National Endowment for the Arts' 2008 *Survey of Public Participation in the Arts* reports that arts attendance dropped from 40% in 2002 to 35% in 2008.

The African American Museum in Philadelphia - R. Kennedy for GPTMC

So, how can the Philadelphia region help lead the turnaround? We need to begin by reframing our mission from ticket sales to engagement. At its heart, cultural engagement represents an evolution from passive attendance to active participation. Engagement is about our understanding that an arts experience does not begin when the turnstile clicks; it actually begins weeks or months in advance with planning and anticipation, and extends with conversation long after the event is over. As we raise our sights from attendance to engagement, we begin to see the potential to dramatically expand public arts participation. Engagement is about making the pie bigger, not cutting it into more slices.

The shift from focusing on attendance to focusing on engagement also entails seeing the creative process through the lens of the consumer. To engage consumers, we need to meet them right where they live. Today's consumers are actively creative and like to talk back, as evidenced by the lively participation of individuals on Internet sites like YouTube™, Facebook and flickr®.

Engagement is about making the pie bigger, not cutting it into more slices.

The research

This report, *Research into Action*, represents a critical first step towards our goal of doubling engagement. Several years ago, as the Cultural Alliance was contemplating the next phase of umbrella marketing for the sector, we asked many of you, our key stakeholders, how we could best support you in your work going forward.

We repeatedly heard the need for solid market research so we sought answers to some challenging questions:

- What are the emerging forms of cultural practice?
- What will Philadelphia region's population look like in 2020?
- How does our region's engagement compare nationally?
- How do people migrate between cultural organizations?
- Who and what influences the decision to participate culturally?

To answer these questions we undertook an aggressive, five-part research campaign designed to be both informative and actionable.



The 5 Studies*

The Cultural Engagement Index

What are emerging patterns of cultural practice?

This research is an ongoing assessment of cultural engagement in the Philadelphia region. The innovative element of this study — first conducted in 2008 — is its broad definition of cultural engagement using a wide range of curatorial, personal creative practice and audience-based activities. Respondents were asked about their involvement in 57 specific cultural activities, including music, dance, theatre, drama; reading and writing; visual art and craft activities; and historic and science activities.

The centerpiece of the study is the creation of an index, a “market basket” of creative and cultural activities that includes traditional and non-traditional cultural activities: attendance at professional performances; museum-going; personal creative practices like writing, singing and acting; and community-based culture such as ethnic festivals and school and church performances. The study indexes the engagement of regional residents by age, life-stage, gender, educational attainment and ethnicity, and finds that:

- Families with children at home have more active creative lives than those without children at home.
- African American and Hispanic residents have higher levels of cultural engagement than whites.
- There is a strong correlation between personal creative practice and audience-based attendance.
- Role models are powerful motivators for many groups, particularly African Americans.
- There is a strong correlation between civic engagement and cultural engagement.

The Cultural Engagement Index was conducted by WolfBrown. The first cycle of data collection was completed in summer 2008 to establish a baseline measure, with the next cycle of data collection planned for 2010 and bi-annually thereafter.

Demographic Trends and Forecasts in the Philadelphia Region Study*

What will the Philadelphia region's population look like in 2020?

In April 2008, The Delaware Valley Regional Planning Commission (DVRPC) conducted a regional demographic analysis and forecast of anticipated socioeconomic shifts by the year 2020. The report includes baseline data for 80 separate planning areas in a 10-county region.

Future changes in population, population characteristics (age, sex, race, ethnicity, household income and household type) and employment were projected through 2020. Key findings of the analysis include:

The increasing diversity of the regional population:

The 10-county region is expected to grow 9% between 2000 and 2020, from 5.9 million to 6.4 million, and virtually all of this increase is forecasted to come from people of color.

The aging of the regional population:

By 2020, almost 20% of the region's residents will be over 65. In 2000, just 13% were 65 or older. The expected growth forecasts an impact on the physical ability of residents to access facilities and events.

figure 15:

Greater Philadelphia's forecasted population change 2000-2020

	2000	2020	aggregate % change
total population	5,887,672	6,439,016	9%
non-whites	1,652,275	2,226,050	35%
whites	4,235,397	4,211,967	-1%

source: Demographic Trends and Forecasts in the Philadelphia Region



Brandywine Workshop - Image courtesy of Brandywine Workshop

* Commissioned by the Philadelphia Cultural Management Initiative, Pew Center for Arts and Heritage.

Culture & the Arts Survey

How does our region's engagement compare nationally?

This survey is a national longitudinal study of attitudes and behaviors of cultural audiences that covers three areas: attitudes and behaviors of cultural audiences, trends in attendance at visual and performing arts events, and motivators and barriers affecting participation. The 2008 edition of the study included 660 Greater Philadelphia residents and allows us to compare local and national patterns of cultural consumption. The survey focuses on attendees of traditional cultural events and sites. Both frequent and infrequent attendees were included in the sample.

The study demonstrates:

- The high cultural involvement of Philadelphians relative to the national sample. Cultural participation in Philadelphia tracks above the national average in 18 of the 20 cultural disciplines.
- The importance of marketing through multiple forms of media for cultural events.
- The strong desire of cultural attendees to enjoy the event with others.
- The importance of the artistic genre or performance in motivating people to attend.

The study was conducted online by the research firm Penn, Schoen & Berland Associates on behalf of LaPlaca Cohen, a strategic marketing, advertising and design firm.

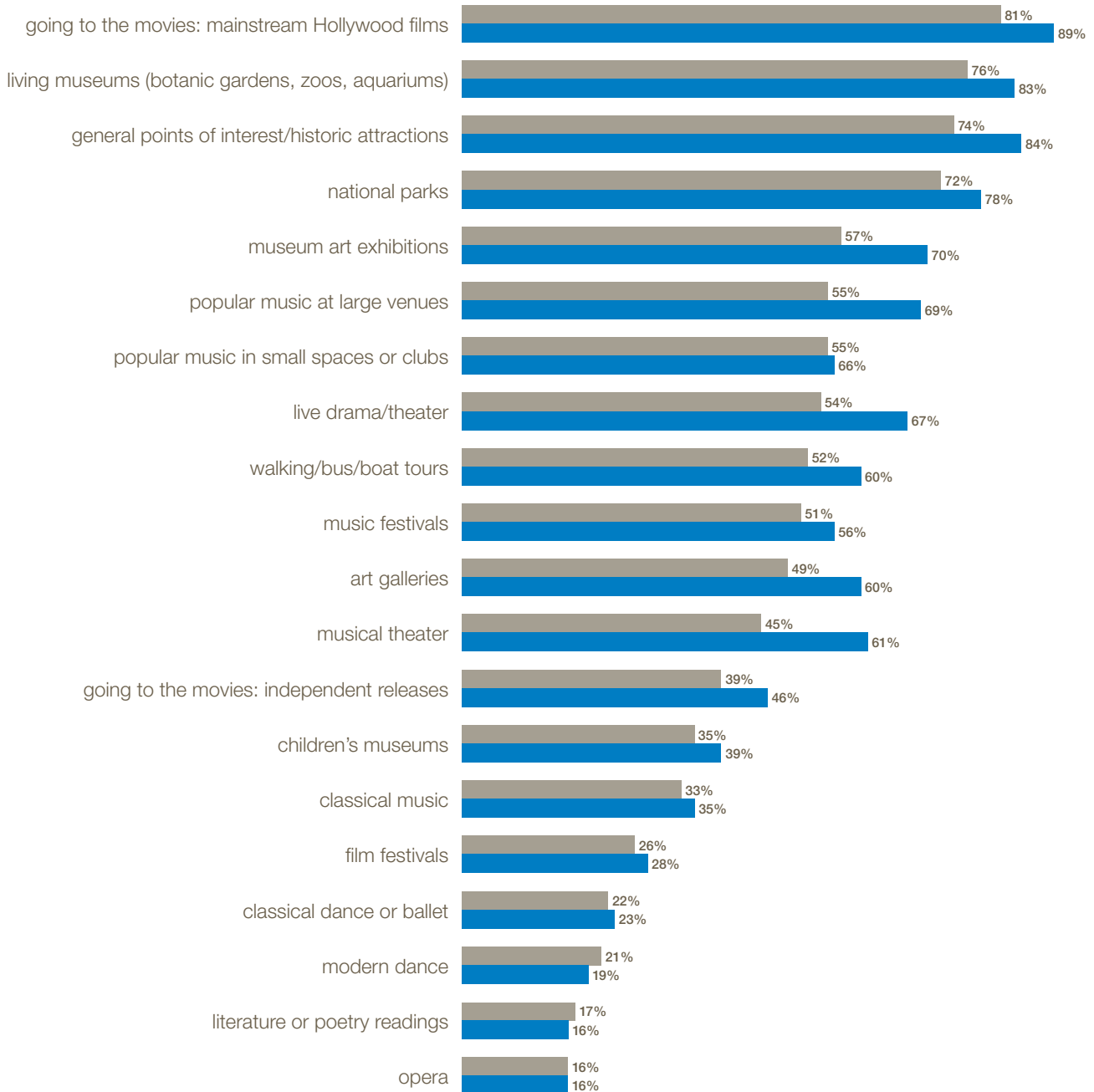


Philadelphia Live Arts Festival, Photo © Jacques-Jean Tiziou / www.jjtiziou.net

figure 4:

Attendance at cultural events

national
Philadelphia region



source: Culture & the Arts Survey

2 out of 3 patrons who attended a cultural event did not come back to any of the 17 organizations the next year.

Paid Patronage Study

How do people migrate between cultural organizations?

Target Resource Group conducted an analysis of 1.64 million transactions that took place from 2003 to 2008 at 17 regional museums and cultural organizations. The analysis outlines migratory patterns, i.e., when patrons began and ended paid patronage, and how patronage lapsed and was reactivated over the study period. Transactions included in the study were single admission and subscription purchases, memberships, and individual donations.

The study reveals strong success in attracting new patrons each year, but serious challenges in retaining these patrons beyond a one-time experience (or transaction). The key finding from the study is that in the Philadelphia region, two out of three patrons who attended a cultural event did not come back to any of the 17 organizations the next year.

The study found three dominant categories of customer behavior:

- One-timers, the dominant category, represent patron households that made one and only one transaction with any of the 17 organizations in the study within the study period.
- Return-after-lapse are patrons who resumed paid transactions after an absence from any of the 17 organizations for a year or more.
- Loyalists, the smallest category, are households that invested in paid transactions with any of the 17 organizations each year of three or more years of the study period.



Opera Company of Philadelphia – Kelly & Massa



Focus group respondents represented the vast majority of the population in their cultural consumption patterns.

Engage 2020 Focus Groups

Who and what influence the decision to participate culturally?

In spring 2009, consumer insight and brand strategy consultant Maureen Craig conducted 12 focus groups with regional residents from various demographic and psychographic segments:

- Age 55+
- Age 18 - 24
- Age 25 - 54, college educated with kids
- Age 25 - 54, college educated without kids
- Age 25 - 54, high school to some college with kids
- Age 25 - 54, high school to some college without kids
- African American, age 25-39
- African American, age 40-54
- Asian, age 25-54
- Hispanic, age 25-54
- Those highly engaged in the personal practice of arts and culture, age 25-40
- Those interested in science, history, personal history and heritage

This study explored the Cultural Engagement Index field survey findings more deeply to hear — in residents' own words — their thoughts, feelings and ideas about cultural participation. The focus groups recruited residents who were neither heavy users nor rejecters of culture, but represented the vast majority of the population that occasionally buys a ticket, sees a performance or goes to a museum.

Focus group respondents emphasized the following:

- The importance of the social element of arts and culture experiences (going out and enjoying time with friends and family).
- The sometimes intimidating nature of arts and culture venues (not knowing the standards for how to behave, the need to sit still and be quiet).
- The desire to have high-quality experiences that were relevant to them (cultural activities that lived up to expectations and the price tag of the experience).

The report

These five studies were designed to work together to answer the tough questions that our sector must face if we are serious about building engagement. We know so much more now about the relationship between our regional residents and cultural organizations. How can we use this knowledge to get more people active and engaged? This report takes those five detailed research studies and pulls their results together to answer that question. Having started with an overview of 10 Key Findings and this introduction, the balance of the report contains the following chapters:

Programming: *The Cultural Engagement Index, Culture & the Arts Survey* and focus groups demonstrate the importance of high quality and relevant programming to achieving strong attendance and engagement. The *Trends and Forecasts in the Philadelphia Region* study indicates that the audience composition for performances and exhibitions is likely to change as the demographics of our region change. This chapter describes what the research findings are for cultural programming in our region.

Increasing Access: The *Culture & the Arts Survey* and focus groups revealed the barriers that residents associate with attending arts and culture activities. This chapter identifies what the research says about those barriers and suggests ways of breaking down the barriers that now exist between cultural presentations/venues and audience members.

Marketing: This chapter demonstrates what the research tells us about reaching new audiences, cultivating relationships with existing audiences and building attendance through marketing.

10 Implications: The 10 Key Findings that opened this report are reprised at the end. We also incorporate some key implications from the research studies covered in our central chapters, taking our findings from research to action.


This report, *Research into Action*, distills the results of the five separate studies down to a single summary of central, overriding themes. Collectively, these themes provide an overview of the marketplace — a starting point. We hope that you, as organization leaders, front-line staff, board members, artistic directors, funders, civic leaders, policy-makers, vendors and supporters will use the findings of *Research into Action* to stimulate discussion, inform planning and drive innovation.



American Philosophical Society - Lisa Godfrey



The Wilma Theater – Jim Roesse



When the barrier
between artist and
audience breaks
down, people get
excited, and want
to participate more.

programming

programming

Marketing and promotion are key components to increasing arts and culture engagement over the next ten years. But, as arts expert Diane Ragsdale says: “to solve the mystery of why 30-year-olds won’t buy tickets to the symphony, we’re going to need to put more on the autopsy table than the season brochure.”* In other words, relying solely on new marketing strategies will only get you so far. There is still the foundational question of how the arts and culture product will have to change in order to attract and engage larger audiences.



Arden Theatre Co. – Mark Garvin

*“Surviving the Culture Change,” Keynote Address, Australia Arts Marketing Summit, Melbourne, Australia, July 2008. Diane Ragsdale is a Program Officer for the Performing Arts at the Andrew W. Mellon Foundation.

Results from the *Culture & the Arts Survey* show that for those who do attend arts and culture activities, the product being offered is the primary reason to go. Interest in the particular exhibition or performance and interest in the genre/period/style of the event were cited as the top two motivators, coming in at 75% and 64% respectively (see Figure 5).

In the same study, respondents report that their attendance is likely to hold steady or decline in the coming year. Regional residents could be described as “*holding steady*” in their demand for arts and culture: 87% report that their participation in arts and culture activities was “*about the same*” or had declined this year as opposed to last (see Figure 6).

The product being offered is the primary reason to go.

figure 5:

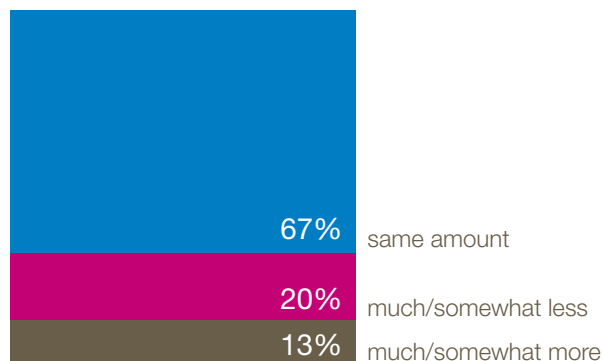
Top five motivations to participate in cultural activities

interest in particular exhibition or performance	75%
interest in the genre/period/style of the event	64%
convenient time or location	62%
cost of admission	55%
educational experience	50%

source: Culture & the Arts Survey; Philadelphia region only

figure 6:

Arts and culture participation last year to this year



source: Culture & the Arts Survey; Philadelphia region only



In this chapter we outline four principles of change for programming based on the research studies conducted:

- 1) Relevance
- 2) Quality
- 3) Power of the personal
- 4) Participation & interactivity

1) Relevance

What makes a program appealing? Focus group and survey research reveal the importance of relevance to consumers in determining what they attend and whether they choose culture or some other type of leisure activity. For many, relevance includes the ability to participate in the art experience and to find a personal connection to the art being presented. We discuss both of those elements in this section. Focus group research also revealed another dimension to relevance: tapping into how and why people want to use their leisure time.

We learned during the focus groups that there are four key values that drive how people spend their leisure time. People want to *de-stress, recharge, connect and become* (i.e., *advance personal growth*.) Arts and culture can truly deliver on these critically important values, allowing cultural organizations to promote themselves as the vehicle for fulfilling what consumers seek.

De-stress

Recovering from the pressures of daily life:

“It’s time when you don’t have to account to anyone for anything. Walking the dog — you have no responsibility. It’s total downtime.”

Recharge

The more active cousin to de-stressing:

“It makes your work feel worth it. Sometimes you’re caught in the rat race everyday and you feel that you’re living for work. You get to enjoy the fruits of your labor when you go out and do something...as if there is a purpose to what I’m doing.”

Connect

Intimacy, belonging and reciprocity are powerful motivators:

“When my husband and I get together and go out salsa dancing, we are laughing more and connecting more and we’re more in tune with one another. It’s like synchronicity.”

Become

The act of personal growth — learning, growing and self-actualizing. Here is where arts and culture is most frequently mentioned:

“Have fun but learn while you’re having fun. You should want to grow mentally. Explore and see more of the world.”

People want to use their leisure time to de-stress, recharge, connect and become.

84% report that first-hand experience with high-quality performance is an important benefit of attending visual arts exhibitions.

2) Quality experiences

The *Culture & the Arts Survey* demonstrates the value of quality programming to audience members:

- 75% of respondents report that experiencing the high quality of the performance/art plays an important role in their desire to make arts and cultural activities a part of their lives.
- 86% report that firsthand experience with high-quality performance is an important benefit of attending the performing arts.
- 84% report that firsthand experience with high-quality performance is an important benefit of attending visual arts exhibitions.

What constitutes a high-quality experience?

Focus group research reveals that quality is a combination of both product artistry and logistics competence. The following is a list of expectations we heard during the focus groups:

Product Artistry

Living up to expectations
Talent, quality
Looking forward to the experience
Deeply engaging when happening
Energy within the audience
Surprises (pleasant ones, surpassing expectations)
Talking about it afterwards
Everyone leaves having had fun
Multi-sensory/
interactive experiences
Creates a memory

Logistics Competence

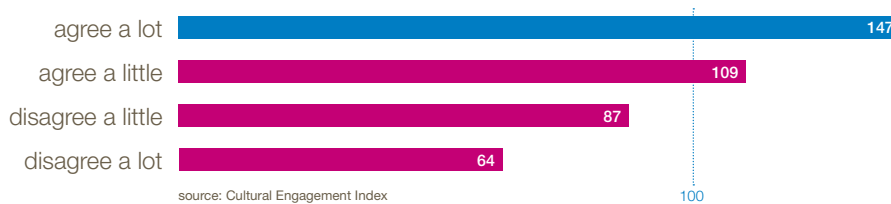
Affordability
Not too crowded
Good pacing, little waiting
Good seats, acoustics, sightlines
Stress-free logistics
(parking, way finding)
Gestures of gratitude
Genuinely welcoming service

3) The power of the personal

A strong connection between personal identity and arts interest is revealed in the research studies. Identity issues around race, ethnicity, religion and cultural heritage are particularly powerful motivators.

The Cultural Engagement Index shows that people who identify with their cultural roots report higher levels of engagement. Those who “agree a lot” that they *take a strong interest in the arts and cultural customs and practices of my ancestors* have a cultural engagement index of 147 versus 63 for those who “disagree a lot” that they *have interest in the arts and cultural customs and practices of my ancestors*.

figure 7:
CEI components by level of agreement with
“I take a strong interest in the arts & cultural
customs and practices of my ancestors.”



Raíces Culturales Latinoamericanas — Veronica Castillo-Perez

example from the field

On the last Friday of every month, Raíces Culturales Latinoamericanas of Philadelphia converts their Talentos studio into a café to host *Tertulias*. *Tertulia* is one of Raíces’ most popular programs, presenting monthly lectures and discussions on Latin American cultural topics. At the end of each *Tertulia*, the microphone is open to any individual who would like to share their talents in music, poetry and dance. A recent *Tertulia* explored Bolero — the soulful singing style adopted by many regions of Latin America. In addition to hosting a concert that featured two celebrated singers, participants played trivia to learn about the history of Bolero, shared stories about their favorite Boleros, and had the opportunity to sing them during the open mic portion of the program.



The African American Museum in Philadelphia — Image courtesy of GPTMC



4) Participation & interactivity

Regional residents are engaged in several forms of creative expression. The Cultural Engagement Index reveals that increasingly, this cultural involvement is participatory, not passive.

The Cultural Engagement Index also demonstrates that there is a strong correlation between personal creative practice and higher levels of attendance. For example, respondents who reported taking music lessons “at least once a month” were about 75% more likely than the average respondent to attend live concerts.

Similar patterns of correlation are seen in each of the disciplines included in the Cultural Engagement Index study including:

-
- Higher frequency of making up dance steps correlated with higher attendance at professional dance performances
-
- Higher frequency of taking photographs with artistic intent correlated with higher attendance at art museums
-
- Higher interest in researching or exploring family history correlated with higher attendance at history and science museums
-
- Higher frequency of taking music lessons is correlated with higher attendance at live concerts
-
- Higher frequency of rehearsing or performing in plays or musicals is correlated with higher attendance at musical or stage plays
-

Additionally, focus group participants and evidence from some regional arts organizations suggest that when the barrier between artist and audience, between professional and amateur, between performer and observer breaks down, people get excited, they want to participate more and they feel more engaged. To put it simply, participation helps to make art more relevant. In discussing why a recent trip to a museum was not more exciting, one young woman in a focus group said: “I don’t understand modern art. It takes away from the experience.” Then she observed: “That gave me an idea — if they offered a lesson on how to do some art technique that’s in the exhibit they are showing, I would appreciate it so much more.”




example from the field

Site-based choreographer Kate Watson-Wallace presented *Car* at a parking garage in West Philly during the 2008 Philadelphia Live Arts Festival & Philly Fringe. *Car* is a movement-based installation for three audience members at a time that takes place in and around a moving vehicle. The performance breaks down the wall between spectator and performer: audience members buy a ticket, go to the garage, give the ticket to the parking attendant and then literally take the back seat as dancers use a vehicular landscape to unravel the secrets and history of car culture.



Anne-Marie Mulgrew and Dancers Co. – Bill Hebert



An arts and culture
experience begins
when someone first
thinks about trying
something out.

increasing and improving access

increasing & improving access

A key component to increasing engagement in arts and culture is removing barriers. Improving the product provides people with positive reasons to engage culturally. Increasing and improving access removes the barriers that many cite as reasons for not attending cultural activities.



Boyer College of Music and Dance – Temple University Photography/Joseph Labolito

When asked what barriers prevent them from attending cultural events, *Culture & the Arts Survey* respondents cited *the program or event doesn't appeal to me, it is too much of a hassle to get there, it is difficult to find the time to attend, I cannot find anyone to go with, and the hours of operation are inconvenient* as top barriers to attendance. Findings from focus groups reveal that consumers perceive a range of barriers to arts and culture participation, including:

- Uncertainty about how to behave in arts and culture settings
- Not having friends to go with and not wanting to go alone to an arts event
- Not enjoying the 'sit still and be quiet' element of traditional arts presentations
- Feeling that other people like them are not going to be there
- Having to plan more and further ahead to have an arts and culture experience than to have a competing experience (like going to a movie or meeting friends at a bar or club)

For many, the buildings that house arts and culture activities are intimidating and the events that go on inside are foreign. Our research also made it clear that an arts and culture experience begins when someone first thinks about trying something out, not from the time they enter the doors of the museum or concert hall. These two conditions — that arts and culture venues can be intimidating and that planning and getting to a performance or exhibition is part of the artistic experience — mean that increasing engagement requires improving access.

Those who cite cultural mentors are a prime example of how barriers to access can be overcome. The Cultural Engagement Index shows us how important having a mentor is to one's own participation in the arts because a mentor literally acculturates one to culture. Those who report having had mentors both inside and outside their family introduce them to culture when they were children are more than twice as culturally-engaged as those who had no role model at all.

Our research identifies seven areas of access that are most critical to potential audiences and, therefore, the most likely to have an impact on increasing attendance:

- 1) Varied performance, show and exhibition schedules
- 2) Socializing opportunities
- 3) Planning made simple
- 4) Cultural role models
- 5) Family-friendly options
- 6) Friendly and welcoming service
- 7) Diversity

1) Varied performance, show and exhibition schedules

One advantage movies, bars and clubs have over arts and culture performances and venues is the varied schedule they offer and the proximity they have to where people live and work. These advantages make it easier for people to enjoy these ways of spending their “down time” for an hour or two, whether it is happy hour at 5 PM or after-hours at 3 AM. While many museums have successfully introduced extended hours and flexible visiting, it is a challenge for performing arts venues.

The Culture & the Arts Survey shows how it is *difficult to find time to attend* and *the hours of operation are inconvenient* as top-ranked barriers to cultural event attendance, cited by 39% and 27% of respondents, respectively.



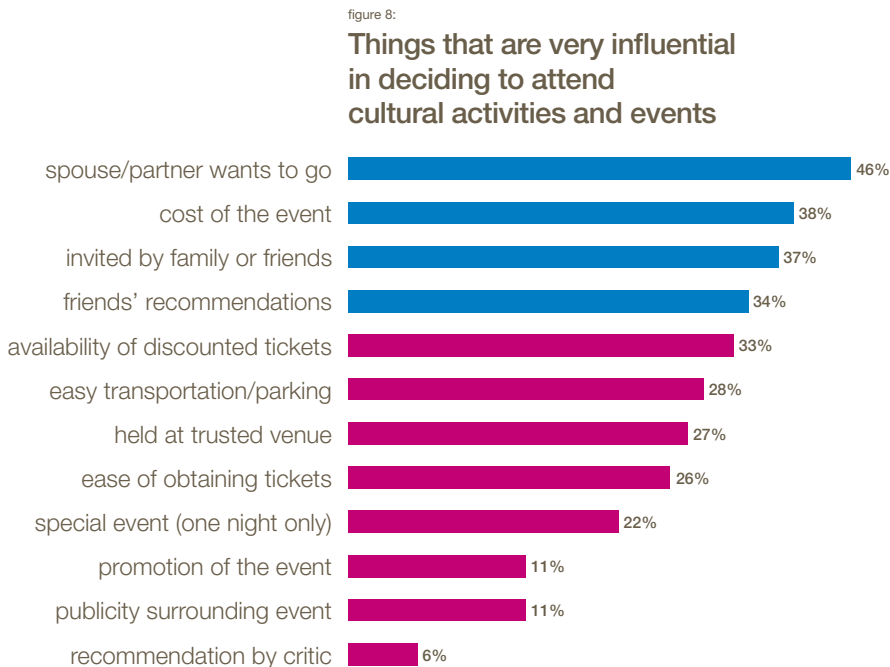
Colonial Theatre - Image courtesy of Colonial Theatre

2) Opportunities to socialize

People seek time, space and opportunities for socializing, and places that provide that are places they will go. When focus group participants were asked to label the category that contained things like *attending museums, going to plays or concerts, seeing dance performances*, they called them “outings” more often than “cultural activities.” In other words, for these participants, the object is to enjoy time with friends and family and the vehicle for doing so is the arts or culture activity.

When asked what influences their desire to attend a cultural event, respondents to the *Culture & the Arts Survey* cited *my spouse/partner is interested in attending, invited by friends/family, and friends’ recommendations* as three of the top four influences.

The object is to enjoy time with friends and family and the vehicle for doing so is the arts or culture activity.



source: Culture & the Arts Survey; Philadelphia region only

The Clay Studio - Image courtesy of The Clay Studio



examples from the field

The Clay Studio hosts Date Night twice a month. Participants can bring along a date, come with friends or take advantage of an opportunity to meet someone new while learning to make a piece of pottery. Beer, wine, light fare, materials and kiln firings are all included.

The Atlanta Shakespeare Company now resides at The New American Shakespeare Tavern®. Patrons simultaneously enjoy theater, food, drink and each other's company in a casual setting.

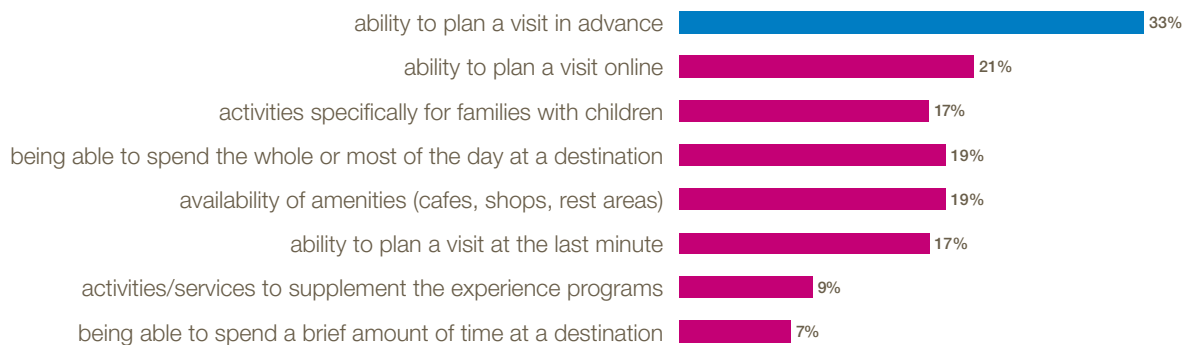
Before every Friday evening performance, CENTERSTAGE of Baltimore transforms their lobbies into Club CENTERSTAGE, with live entertainment, happy hour drink prices, and food samplings from local restaurants.

3) Planning made simple

An arts and culture experience begins when it occurs to someone to try something out, not from the time they enter the doors of the museum or concert hall. *Culture & the Arts Survey* respondents cite the *ability to plan a visit in advance* of the show as the most important factor in deciding to attend a cultural event. Focus group participants told us that information-gathering about the times and dates of shows, ticket purchases, parking and other amenities, meeting up with the people you are going with, and going out or getting home afterwards are all part of what arts and culture organizations have to consider as part of the art experience.

figure 9:

Very important aspects of cultural engagement



source: Culture & the Arts Survey; Philadelphia region only

Respondents cite the ability to plan a visit in advance of the show as the most important factor in deciding to attend a cultural event.

4) Cultural role models

The Cultural Engagement Index shows that cultural role models are key to increasing engagement. People with mentors both inside and outside of the family are twice as culturally active as those who have no role model. It is in cultural providers' best interest, therefore, to empower and thank mentors as well as facilitate opportunities to create new cultural role models for those who do not have them.

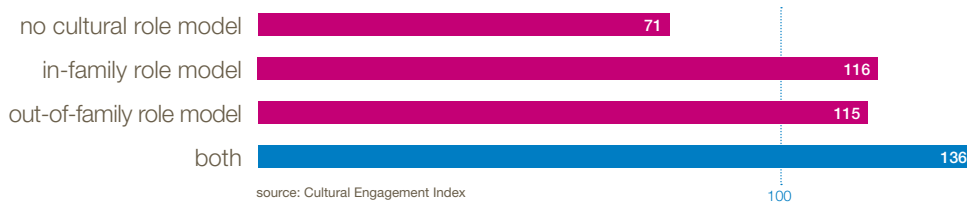
Focus group participants who enjoy and participate in arts and culture activities typically had mentors who took them to performances and museums when they were young. For many, these mentors continue to be influential as a source of ideas and encouragement when it comes to trying new cultural offerings:

“I have a girlfriend who is very interesting. I met her at a Pow Wow and because of her I started dancing the Pow Wows. She’s the one who took me to my first opera at the Met.”

“My mother, she raised five of us. Besides instilling a heavy amount of classical music in us, when we went to school it just seemed it was enhanced. Sometimes we would have great teachers that would take us on great field trips and so it grew from there into high school and college.”

figure 10:

Cultural Engagement Index by presence of cultural role model



Taller Puertorriqueño — Nerys Jaquez

example from the field

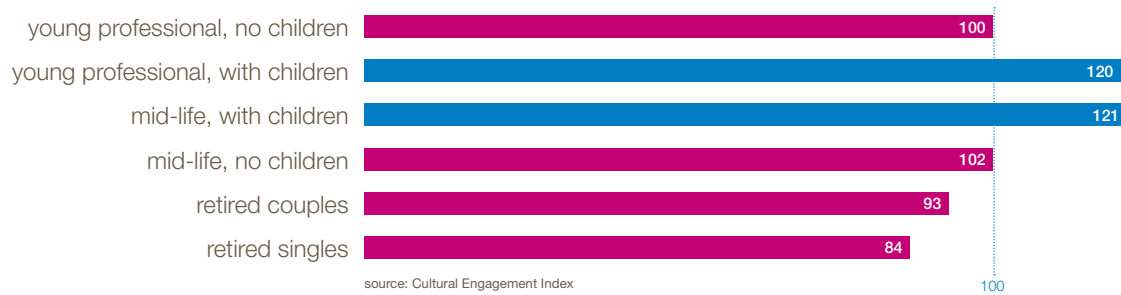
Taller Puertorriqueño offers a Youth Artist Program, a two-year professional art-training program for high school students. One of the primary objectives of Taller's programming is to serve as an educational vehicle advancing cultural identity and reaffirmation. A student's personal experience is often indicative of the impact they are making. Youth Artist Program participant Nerys Jaquez puts it this way: "Taller Puertorriqueño is an ideal place for me to grow as an artist, and as a young Latina in my community. Thanks to Taller, I have begun to understand many important things like defining my future, and it has inspired me to become a great photographer."

5) Family-friendly options

It is generally believed that when a couple has children they tend to drop out of the cultural system. The Cultural Engagement Index proves this belief to be false. In fact, families with children have the highest engagement index of any life-stage cohort included in the study.

figure 11:

Cultural Engagement Index by life-stage



Historic Philadelphia, Inc. - M. Kennedy

Focus groups confirm that exposing children to culture and keeping them busy and entertained are a huge focus of parents' lives. In fact, parents' interest in providing cultural experiences for their children could be a key to increasing participation and engagement more generally. There will be an estimated 662,000 households with children in the Greater Philadelphia region in the year 2020 (DVRPC). Even a minor increase in those households' participation would yield significant returns for the arts and culture community.

The *Culture & the Arts Survey* references these findings but also reveals a serious conundrum for families with children who value arts and culture experiences: *only a minority of respondents agreed that most organizations are children-friendly.*

figure 12:

According to the Culture & the Arts Survey:

88% agree that “encouraging children to attend arts events enriches their understanding of the world.”

84% agree that “it is important to introduce children to the arts at an early age.”

39% of survey respondents agree that “most organizations are children-friendly.”

source: Culture & the Arts Survey; Philadelphia region only

While it is important to provide more cultural programming and venues that are accessible to families with children, we must recognize that one product does not fit all ages. There is big difference between what interests a teenager as opposed to a toddler. As one focus group participant put it, “My children are different in ages so a lot of things are geared to my younger children. My 17-year-old is either forced to go or left at home because he doesn't want to go because it's kids' stuff. It's hard to do things as a complete family.”

The *Culture & the Arts Survey* shows that a number of areas are key for increasing participation for households with children. The following page includes the five most significant differences between households with and without children when it comes to the question of increasing family participation.

example from the field

The Museum of Modern Art in New York offers families with children ages four to fourteen a range of opportunities to explore the museum's collections and special exhibitions. Activities include:

Tours for Fours: a program specifically designed for four-year-olds and their parents. Families are introduced to painting, sculpture, photography, works on paper, and more through interactive gallery activities and discussions.

A Closer Look for Kids: an opportunity for children ages five to ten and their parents to explore artworks in the Museum's collection and special exhibitions through theme-based discussions and gallery activities. New topics are explored each month.

Tours for Tweens: a series designed for families with eleven- to fourteen-year-olds. Participants engage in activities together, share ideas, and exchange opinions about modern and contemporary art.



figure 13:

Top 5 influences for increasing family participation

Free programs

influences 60% with children vs. 47% without children

Incentives for bringing family or friends

influences 58% with children vs. 28% without children

I could dress casually

influences 34% with children vs. 28% without children

Connections with local community organizations

influences 20% with children vs. 13% without children

Friendlier staff

influences 18% with children vs. 11% without children

source: Culture & the Arts Survey; Philadelphia region only



Morris Arboretum of the University of Pennsylvania – Image courtesy of Morris Arboretum of the University of Pennsylvania



example from the field

Servicing an arts and culture newcomer is different than providing customer service to an aficionado. Newcomers are sensitive to feeling out of place, so it is important to ensure that all staff know how to welcome, direct and inform people who are unfamiliar with the venue. The Atlanta Opera offers free “study guides” to novice opera-goers so that they know what to expect from their first visit. These guides provide tips for making a trip to the opera more comfortable, a brief overview of the performance’s storyline, bios about the composer, conductor, director and set designer, and a history of opera in Atlanta.

6) Friendly and welcoming service

Focus group research revealed another barrier: that the rules of engagement at arts venues are unfamiliar to many. As one focus group participant said: “When you’re at a ball game, there’s no dress code, no language code. You all see the same tip-off and watch the same game.” Front-line customer service staff are the people who can make the difference between someone feeling they belong and are part of an important and fun experience, and someone feeling uncomfortable and unwelcome at a cultural event or activity.

Are we doing enough to welcome diverse audiences into our venues, which often are perceived to be exclusive havens for older, white and wealthy patrons?

7) Diversity

On the one hand, we know from the focus groups that personal identity does drive interest in and attendance at arts and culture activities. On the other hand, people value cultural diversity, which includes sharing art from their culture with others as well as experiencing art and culture in diverse, ethnically-mixed environments. Here are some of the comments we heard from the focus groups:

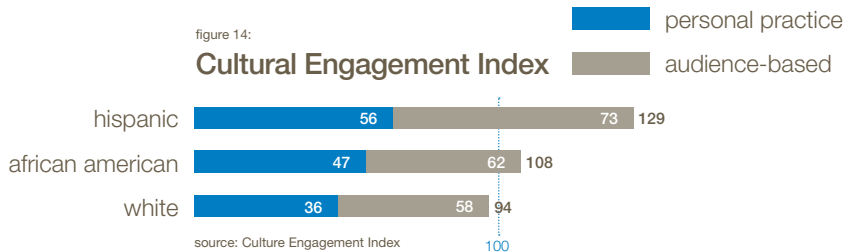
“Cultural exhibits and ethnic festivals... I believe they interconnect. I like going to different parades like the Puerto Rican Day parade to expose myself to different cultures and the food.”

“One nice thing about Chris’ [Jazz Café] is that it gets all kinds of people: white, black, young, old. And you see the same people and new people.”

“When you have little kids who are not that familiar with their own ethnicity and when you go to your ethnic places and see a totally 100% American guy there eating your own food and appreciating it, that gives them a little bit more boost. Yes, we are one of these.”

Our research shows that people of color in our region are highly engaged and their population is growing. But are we doing enough to welcome diverse audiences into our venues, which often are perceived to be exclusive havens for older, white and wealthy patrons?

The Cultural Engagement Index reveals that both African Americans and Hispanics are more culturally engaged than whites.





Latin Fiesta, Inc. - Paul Cichas, Lafayette Studios



Greater Philadelphia Tourism Marketing Corporation - Marco Roddan

example from the field

Over the summer of 2009, The Greater Philadelphia Tourism Marketing Corporation (GPTMC) launched a new initiative called Philly 360°, a marketing strategy to promote the region's strong African-American cultural heritage and creative scene. The campaign focuses on expanding Philadelphia's current visitor base by attracting a new group of African-American travelers who are younger, technologically savvy and driven to an urban destination based on its history, mainstream attractions and underground culture. The online calendar of events created as part of this initiative can be found at www.gophila.com/campaign/philly360. This site serves as a comprehensive guide to the region's diverse creative scene, nightlife, music, history, food and more.

figure 15:

Greater Philadelphia's forecasted population change 2000-2020


	2000	2020	aggregate % change
total population	5,887,672	6,439,016	9%
non-whites	1,652,275	2,226,050	35%
whites	4,235,397	4,211,967	-1%

source: Demographic Trends and Forecasts in the Philadelphia Region

Our research shows that people of color in our region are highly engaged and this population is growing.



Arden Theatre Co. - Mark Garvin



Being aware of a
cultural event is
different than
feeling invited.

marketing

Our regional nonprofit arts and culture organizations are spending an average of 5.5% of their budgets on marketing, or an average of \$150,000 per organization per year.* In an advertising-saturated world, consumers are exposed to scores of marketing messages per day — *Consumer Reports* estimates the number at 247 — and making a dent with \$150,000, or even \$1.5 million, can be a challenge.



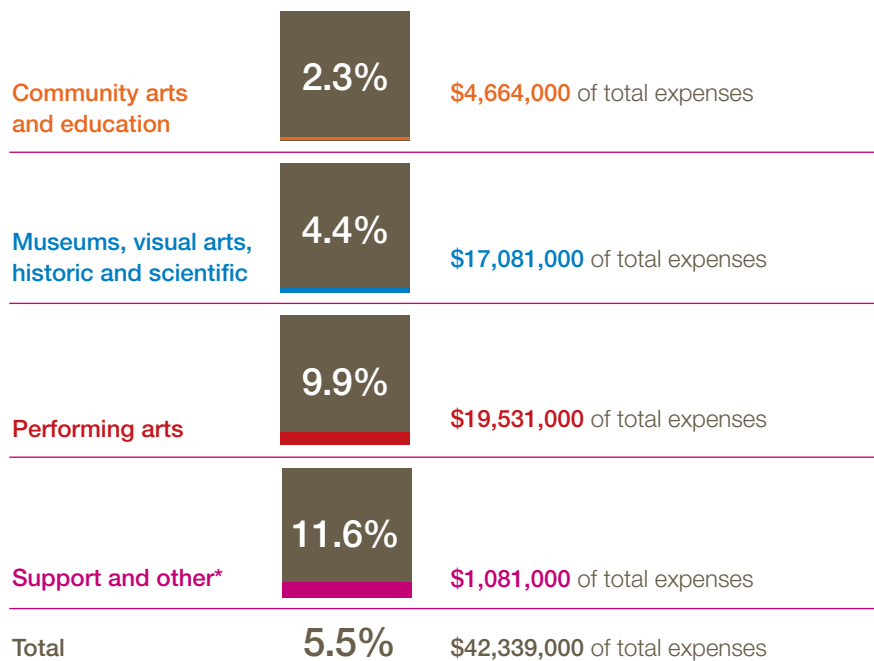
* 2008 Portfolio, Greater Philadelphia Cultural Alliance

1812 Productions – Mark Garvin

Marketing budgets vary widely for nonprofit arts and culture organizations depending on their discipline and size. Figure 16 shows marketing expenses in dollar amounts and as a percent of total organizational budget for nonprofit arts organizations in different sectors.

figure 16:

Marketing expenses by organization type



*A large percentage (86%) of marketing expenses by Support and Other organizations are from two organizations.
source: 2008 Portfolio

The research for Engage 2020 shows that there are marketing opportunities for arts and culture organizations that would allow even limited marketing budgets to work harder and more productively.

In this section, we present findings on four key marketing elements to guide arts and culture organizations:

- 1) Demographic trends
- 2) Retention
- 3) Marketing on- and off-line
- 4) Women as decision-makers, moms as mentors

1) Demographic trends

The changing demographics in the region will greatly impact where and how organizations will need to market over the next decade. DVRPC's study, *Demographic Trends and Forecasts in the Philadelphia Region*, demonstrates population shifts that will be relevant to marketers trying to reach new audience members. Key findings from the demographic study show:

- Residents of color will account for virtually all of the region's population growth by the year 2020, particularly in a number of communities outside the city of Philadelphia.
- Philadelphia (with the exception of Center City) will continue to lose population, while the suburbs in Burlington, Gloucester, and Chester counties will gain the most new residents.
- By the year 2020, one in five of the region's residents will be over the age of 65.

figure 17:

Population shifts for key communities 2000-2020

forecasted
percent change

planning area	total population	white	non-white
Upper Perkiomen Valley (Montgomery)	29%	25%	141%
New Hope (Bucks)	41%	38%	136%
Quakertown (Bucks)	39%	35%	135%
Spring-Ford (Montgomery)	44%	38%	135%
Central Pencader (New Castle)	46%	22%	133%
Central Buck East (Bucks)	33%	30%	132%
Newtown (Bucks)	30%	25%	125%
Indian Valley (Montgomery)	26%	20%	121%
Central Bucks West (Bucks)	28%	23%	118%
Hopewell/Pennington (Mercer)	22%	10%	117%
River Region (Camden)	-1%	-64%	94%
Near Northeast Philadelphia	-2%	-24%	80%

source: United States Census Bureau, April 2008

Our focus group research showed that being aware of a cultural event is different than feeling invited, especially for minority audiences. African American audiences *learn* about cultural events from mainstream media, but they feel *invited* when they hear or see it advertised in African American-oriented outlets:

- “I might learn about an event or a show on mainstream radio, but if I hear it advertised on a black station, then I know it’s for me.”
– African American focus group participant

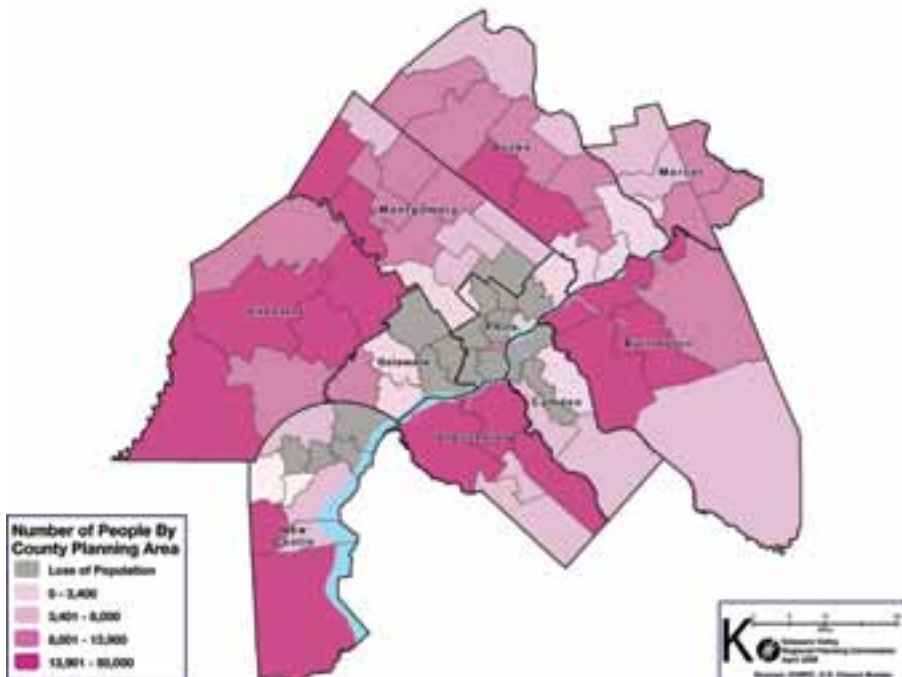
How can organizations make traditionally underexposed audiences feel invited? “Taking it to the neighborhoods” was mentioned as a strong marketing tool for traditionally underexposed audiences:

- African American audiences talked about in-person presentations at churches, recreation centers and schools as valuable ways to introduce African Americans to new productions and exhibitions.
- Asian Americans talked about food as a unifying element in a community that is diffuse (especially in Philadelphia). “Street team” marketing approaches in Asian restaurants and food markets get attention, generate word of mouth and reach the community where they are.

The changing demographics in the region will greatly impact where and how organizations will need to market over the next decade.

figure 18:

Forecasted absolute population change by CPA, 2000-2020



source: Demographic Trends and Forecasts in the Philadelphia Region

We do a great job of attracting first-time attendees, but not such a good job retaining them.

Newspapers are still the leading source of awareness for cultural events for all age groups and demographic categories.

2) Retention

Target Resource Group's Paid Patronage Study demonstrates that our cultural community is facing a major marketing challenge — attrition. People are coming to our venues, but in many cases they do not return. We do a great job of attracting first-time attendees, but not such a good job retaining them, even though marketing to repeat visitors tends to be more cost-effective.

For the 17 major organizations in the Paid Patronage Study, two out of three patrons who attended a cultural event did not come back to any of the 17 participating organizations in the next year.

3) Marketing on- and off-line

Despite declines in circulation, newspapers are still the leading source of awareness for cultural events for all age groups and demographic categories, according to the *Culture & the Arts Survey* (see Figure 19). Figures 19 and 20 show the dominance of newspapers and word of mouth as the vehicle for getting information regarding an arts/culture event.

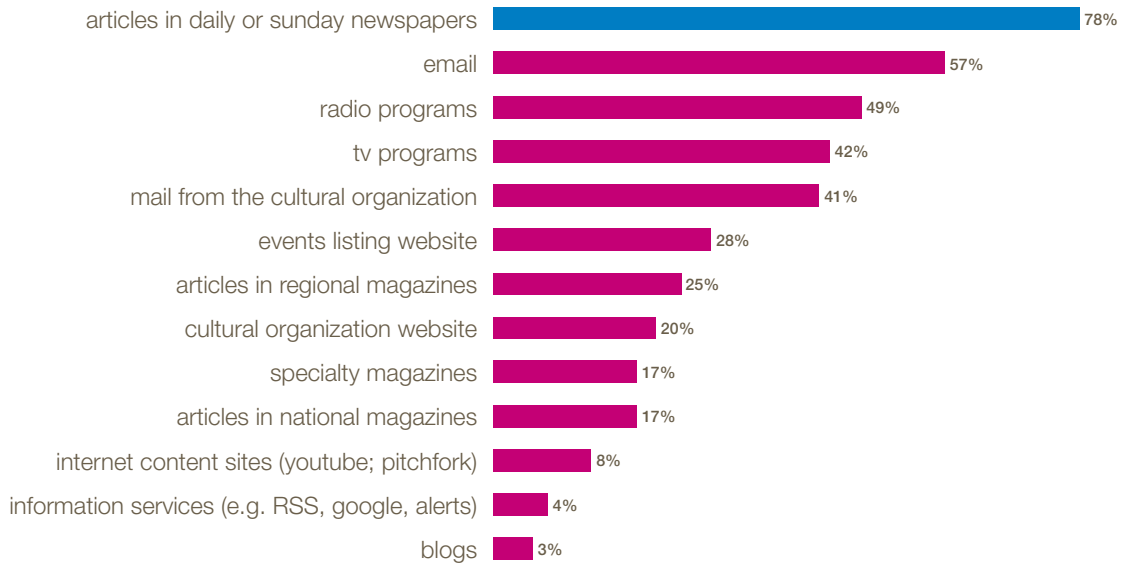
Focus group research reaffirms this conclusion and reveals that while awareness is built through traditional paid advertising — newspaper and radio were most frequently mentioned — planning and decision making takes place online. Younger audiences tend to gather their information via word-of-mouth through social networking sites such as Facebook and Twitter, blogs, review sites like Yelp.com, and content sites like YouTube.



The Community Arts Center, Wallingford – Image courtesy of the Community Arts Center, Wallingford

figure 19:

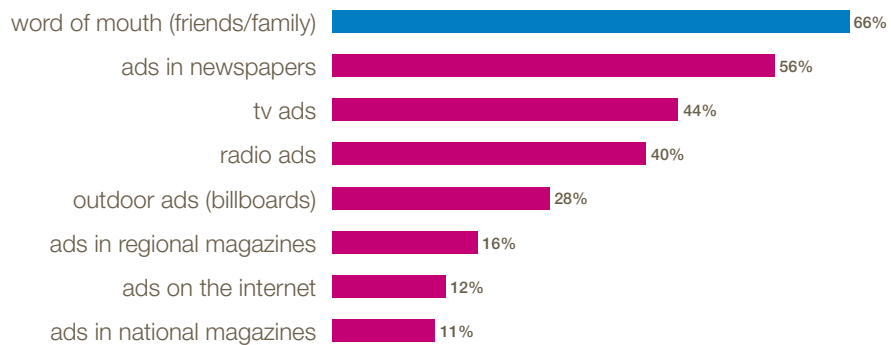
Where do you get information about cultural events? (non-advertising sources)



source: Culture & the Arts Survey; Philadelphia region only

figure 20:

Where do you get information about cultural events? (advertising sources)



source: Culture & the Arts Survey; Philadelphia region only

4) Women as decision-makers; moms as mentors

Women tend to be the decision makers when it comes to attending arts and culture events, and they were the most commonly-mentioned mentor in focus groups. From a marketing perspective, women are the key to leveraging a family's or couple's attendance and to building audiences for the future through their role as mentors to their children.

"I make the plan and tell my husband we're going (to a play or concert) and he isn't always happy about it, but he likes it when he goes."

– Female focus group participant

"My mom took me to a lot of theater when I was about 4 years old sitting on her lap. At that young age I really got hooked on it. I grew up in NYC and went to Broadway. A lot of exposure was from home." – Focus group participant

Households headed by single parents (typically women) will also be increasing over the next ten years. *The Demographic Trends and Forecasts for the Philadelphia Region* study predicts a 22% increase in the number of households headed by single parents between 2000 and 2020, from 205,000 to 250,000.

"I make the plan and tell my husband we're going (to a play or concert) and he isn't always happy about it, but he likes it when he goes."


– Female focus group participant



People's Light & Theatre - Mark Garvin



National Constitution Center – Image courtesy of the National Constitution Center



History is filled with
examples of
disruptive change.
Success is marked
by those who
adapt to it.

10 implications: pathways to new opportunities

10 implications pathways to new opportunities

Following our examination of the research, we return to the 10 key findings with which we opened this report. We can now draw some implications for these findings based on the research presented. And, once again, we encourage you to examine the five full research studies available at: www.philaculture.org/research-into-action.



Philadelphia Museum of Art – Image courtesy of Philadelphia Museum of Art

1) Scoring well

One of the bright spots in our research was that cultural participation in the Philadelphia region seems to track above the national average. The *Culture & the Arts Survey* sample for our region showed higher participation rates in 18 of 20 cultural disciplines. Focus group comments across groups further substantiated this observation.

The implication of this result is that this region starts with a distinct cultural advantage. Our long history of supporting the arts both as attendees and donors has enabled us to build a cultural base that is a defining strategic advantage for our region. In an increasingly competitive global economy, where regions fight to establish their identity and attract the best and brightest workers, culture is one of the assets that distinguishes us. As Philadelphians, we can be justifiably proud of the cultural asset base that we have built.

2) Plugging the leaks

If Philadelphia's overall cultural participation rate is a source of pride, then our attrition rate should be a source of concern. In the Paid Patronage Study of 17 major organizations, two out of three patrons who attended a cultural event did not come back to any of the 17 participating organizations in the next year. (While 17 organizations is a small sample, and there are factors that may mitigate the attrition rate, the study's findings are consistent with evidence on audience "churn" elsewhere). The critical implication is that our marketing has been successful in attracting new people into the system, but not at retaining them as members of the culturally-engaged community.

The other way of looking at this issue of "churn" is that we have a huge, affordable opportunity to expand cultural engagement simply by increasing retention and frequency among existing customers. In most industries, the cost of acquiring a new customer is very high, so organizations invest heavily in loyalty to maximize the return from their existing customer base. Are we doing everything we can to engender and reward loyalty? What incentives do we create to bring a friend or to pass along a lead? Are we capturing the name of every person who walks through our doors? How do we woo customers after the initial experience? Can we establish partnership packages that cluster complementary cultural offerings, rather than always going it alone? Ultimately, strategic retention programs appear to represent a huge, affordable opportunity to increase cultural engagement.

Our long history of supporting arts and culture both as attendees and donors has enabled us to build a cultural base that is a defining strategic advantage for our region.

If we want to increase cultural engagement at our own organization, it is clear we need to embrace this new appetite for personal creative expression.

3) Practicing personally

Today, there is an explosion of personal creative practice happening all around us, from writing poetry to dancing to gardening to curating music on our iPods. For some in the arts, this diffusion of creative practice can be seen as a distraction or a threat. Why should we care about activities that have nothing to do with putting a paying customer in our seats?

The answer is twofold. First, personal practice is a gateway to attendance. Our own Cultural Engagement Index shows that across cultural disciplines, there is a clear correlation between personal practice and audience-based attendance. Second, personal practice represents an evolution of cultural experience that we cannot ignore simply because it does not neatly fit into our current model of operation. History is filled with examples of disruptive change. Success is marked by those who adapt to it, and failure by those who ignore it.

In his book *Engaging Art*, Steven Tepper makes a compelling argument that the “twenty-first century will be shaped by the Pro-Am Revolution” (involving both professionals and amateurs). Just as the sports sector captured wide social acceptance through spectator and participatory immersion (at professional sporting events and through recreational leagues), the cultural sector now has the same opportunity. With “amateur” art production and personal practice on the rise, and the cultural sector’s growing awareness of the nexus between practice and attendance, we have an opportunity to deepen our connection with a new generation of cultural “weekend warriors” who have a lifelong engagement with culture, not just as spectators, but as participants and creators.

If we want to increase cultural engagement at our own organizations, it is clear that we need to embrace this new appetite for personal creative expression, and look for ways to integrate it into the evolution of our product and promotion throughout the lifecycle of our customers.

4) Cultivating diversity

One of the most compelling findings of the research is the difference in engagement levels between whites and non-whites. The Cultural Engagement Index indicated that African Americans were 15% more engaged than whites, and Hispanics were 37% more engaged. The composition of that engagement may vary by ethnicity, but clearly arts and culture play a significant role in capturing and elevating the experience and heritage of Philadelphia's diverse populations. As arts and culture leaders, we need to ask whether those higher engagement levels are occurring because of our efforts or in spite of them. Given that focus group participants revealed that people of color do not always feel invited or welcomed at traditional arts venues, we need to find new ways to reach out to this important part of the market.

The changing demographics of our region and our country are undeniable. Between 2000 and 2020, Greater Philadelphia's population is projected to grow by 550,000 people, and the vast majority of them will be people of color. Arts and culture organizations will need to adapt programming and marketing to accommodate the changing demographics of our region.

In our goal to double the region's cultural participation, diversity represents a huge engagement opportunity. It compels us to examine every aspect of the creation, curation, and communication of our experience.

Teens are at a crucial stage of development, and we in the arts should not abdicate our natural advantage to reach and support them.

5) Reaching out to families

Traditional wisdom has been that people drop out of the cultural system when they have children. We reasonably assume that the time demands and expense of caring for children preclude evenings out. But that perception is narrow, because it focuses on only one aspect of engagement. The reality is that people become more engaged with the presence of children in the household — it's just that the nature of their engagement changes as their focus shifts from the social attributes to nurturing attributes.

According to the *Culture & the Arts Survey*, nine in ten Philadelphians believe that *encouraging children to attend arts events enriches their understanding of the world*. Four out of five think it *is important to introduce children to the arts at an early age*. Yet, fewer than two in five think that *arts organizations are children-friendly*. Clearly there is a huge gulf between the public interest and our success in fulfilling it. So what can we do to become more kid-friendly? Do we offer any options of shorter duration and time of day that provide a successful entry point? Does our pricing to families reflect the limits on their discretionary income, and recognize the long-term value in cultivating future patrons?

We also need to acknowledge that children are not a monolithic demographic. We cannot lump the interests of a 4-year-old, 8-year-old, 12-year-old and 16-year-old into a single category, and assume that the same “kids” experience will satisfy all. Arts and culture groups will need to continue to develop and market different age-appropriate products that reflect an understanding of children’s dramatic rate of change in social and intellectual development.

Additionally, we need to aggressively reclaim our stake with teens. Almost all of our efforts to date have been concentrated on young children, both in family programming and through arts education. But teens are at a crucial stage of development, and we in arts and culture should not abdicate our natural advantage to reach and support them. As teens are separating and establishing their individual identity, the arts are a vital vehicle for self-knowledge and expression. Patterns of behavior are being embedded that will last a lifetime. At this vital point of imprinting, are we offering experiences that connect with teen issues, that are relevant and inviting, and that allow them to participate as individuals distinct from their families? Apart from our clear social interest in this outcome, we also have a selfish financial interest in establishing loyalty and a habit of participation with a consumer who could patronize the arts for a lifetime.

6) Mentoring

Research findings from the Cultural Engagement Index show that children who have role models inside and outside of the home become adults who are twice as engaged as those with no role model. So how do we celebrate and support the family cultural experience? What are we doing to satisfy the hunger for shared cultural experience that becomes part of our personal heritage, and that gets passed on from generation to generation? Do we offer pricing options to entice inter-generational participation? Do we invite parents and children, adults and teens, grandparents and grandchildren to workshops and special events or productions?

7) Marketing across the spectrum

The explosion of media channels has made cultural marketing both complex and expensive. Newspapers, despite the overall decline in circulation, remain the most important vehicle for getting initial information and building awareness. But it is a two-step process, with planning, decision-making and often purchasing taking place online. Younger audiences are more likely to blog and use review sites like Yelp™ and content sites like YouTube™. Women are still the primary decision-makers and mentors. Audiences of color expect to see advertising in both mainstream and targeted media to know that they are truly invited. Direct mail and e-mail remain critical to maintaining contact with current customers.

The key implication is that cultural organizations need to be prepared to invest more time and money in marketing in order to cover all the bases. The current average marketing investment of 5.5% of budgets is likely to increase over time, not by choice, but by necessity. Next, organizations looking to grow will need to match the media to the market to reach out to new participants, on a niche by niche basis. Finally, organizations need to think about adding real value to the message. Cultural participation requires a high investment from consumers in price, effort, transportation, and convincing someone else to go along with you. Therefore, the extent that the message content helps reduce the risk for the buyer increases the likelihood of purchase. This may mean adopting approaches like Amazon's "If you liked 'X', you might also like 'Y' approach, offering website links that preview a show, or facilitating referrals and deals from friends and trusted peers. All of these approaches reduce purchase risk and increase confidence, connection and anticipation.

Cultural organizations need to be prepared to invest more time and money in marketing in order to cover all the bases.

Anything that engages people personally in the art before, during or after the experience will deepen their connection.

8) Building high quality and relevant product

Not surprisingly, our quantitative research tells us that the most important factor in the decision to participate is product. Qualitative analysis from focus groups amplifies that conclusion, with multiple participants telling us that they have had arts experiences that did not live up to their expectations or that they simply did not “get.” Our Paid Patronage Study reveals that two-thirds of our patrons do not come back for more. So what needs to change?

First, we need to recognize that personal creative practice is growing and affecting consumers’ expectations for attendance-based activities. Audiences are no longer content to sit in the dark and applaud at the end. Anything that engages people personally in the art before, during or after the experience will deepen their connection, satisfaction and the likelihood that they will come back and bring friends.

Second, we can mix the familiar with the unfamiliar, understanding that challenge is central to culture’s appeal, but when the challenge goes too far, it makes people feel stupid and turns them off.

Third, we can acknowledge that, at its best, experience is deeply personal, so there is huge value in building on connections to race, ethnicity, religion and heritage.

Finally, we need to remember that we compete with a myriad of leisure options for consumers’ discretionary time and money. We will succeed only if we deliver a quality experience that does not just meet patron expectations, but consistently exceeds them.

9) Connecting socially

We have an enormous opportunity to increase cultural engagement simply by facilitating social connection. One of the recurrent themes throughout our research was the hunger for social connection. People seek time, space and opportunities for socializing, and the places that provide this are the places they will go. In focus groups, participants were more likely to refer to museum visits, plays and dance performances as “outings” than “cultural activities.” For many people, especially younger ones, the object is to enjoy time with friends and family, and the vehicle for doing so is a cultural activity.

So, are we delivering on our customers’ desire to connect with each other? Do we make it easy for groups of friends to come together? Do our web sites encourage dialog before, during and after the experience? Do we provide opportunities to talk during the experience, or is the expectation silence and stillness? Do our lobbies feel more like an empty foyer than a Starbucks? When a performance is over, and a patron’s senses are heightened, do we provide space to share the post-experience? Or, do we send them straight out into the night to their parked cars?

10) Serving needs

Finally, we learned that we have a significant opportunity to increase engagement simply by enhancing our guest service. Survey results and focus group discussions revealed that even to guests who are predisposed to visit our facilities, we still throw up too many barriers. Decorum remains an issue, because the rules of engagement frequently intimidate new patrons. Many consumers also talk about their limited time. In the performing arts, duration of event and time of day are remarkably consistent scheduling elements across organizations and disciplines. Could an organization test an earlier or shorter option during the middle of the work week? Transportation is also a repeated concern — can we make the experience hassle-free by packaging parking with tickets, offering public transportation discounts, supplying safe areas for parking bikes, or encouraging alternative methods of transportation such as car sharing?

Ultimately we need to re-evaluate the guest experience from start to finish, from the initial exploration of information through the logistics of buying a ticket to the welcome at the venue to post-event communications. The personal touch, connection and elimination of barriers are all opportunities to increase engagement without significantly increasing cost.

conclusion

The research outlined in this report is the important first step in the larger **Research into Action model** — a logical progression that begins with a foundation of research, which leads to implications of that research that are unique to individual organizations, which ultimately lead to innovation and implementation.

We encourage you to use this report as a springboard to innovation at your organization and as part of our region's collective goal to double engagement by the Year 2020. It is a goal that is vital to all.

Consider that between 1990 and 2001, the number of arts organizations in this country rose about 60%, while attendance at traditional art forms rose only 6%.

Here in the Philadelphia region, we know that half of cultural organizations are operating at a deficit, and one quarter run an annual loss of greater than 10%. We also know that while our field employs 19,000 people locally, compensation for arts and culture employees significantly lags other sectors.*

So there are some pretty obvious and immediate financial reasons to focus on building demand. But there is a far more important reason as well. Audience engagement is not just about helping cultural organizations survive, it is ultimately about providing a strong, healthy civic life that our region and country deserve. If we are to confront the social and moral challenges before us — crime, education, economic opportunity — culture has a vital role to play.



Philadelphia Theatre Company — © Peter Aaron/Esto

* 2008 Portfolio, Greater Philadelphia Cultural Alliance

Citizens and policy makers are increasingly realizing that the starting points for civic engagement are core skills such as perception, compassion, creativity and innovation — the very skills that the arts cultivate. But unless we in the cultural sector get better at building broad participation and appreciation, we will fail to deliver on our true mission. *Research into Action* is ultimately about a lot more than just the bottom line for arts organizations. It is about our integral role as a civic partner.

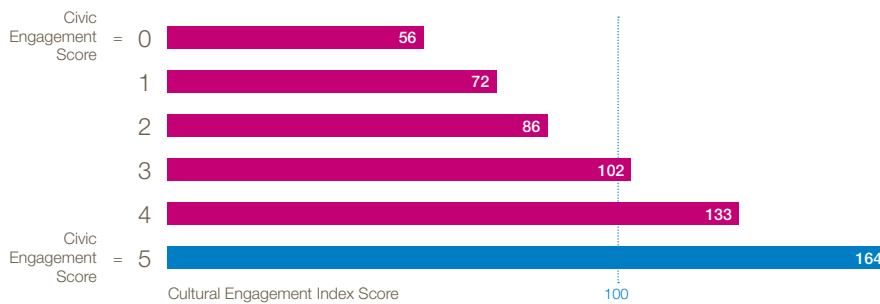
Cultural engagement is an organization-wide mandate that involves everyone from the box office to the board. Historically, we have tended to operate in silos in which the board is responsible for fundraising and governance, the artistic and curatorial staff determine the product, the marketing staff communicate it, and the box office sells it. But that siloed model is flawed if the collective expertise to create strategy is never united and if the most important participant, the patron, is absent from the equation.

This report puts the patron front and center through research that identifies consumers' leisure values, their cultural preferences and practices and the barriers that stand in the way of further engagement. We hope it is a springboard to action to adopt a consumer-focused, organization-wide approach to product and market development.

Research into Action is ultimately about a lot more than just the bottom line for arts organizations. It is about our integral role as a civic partner.

figure 21:

Relationship between the Cultural Engagement Index and civic engagement scores



Respondents were given one point for each of the following civic activities they engaged in: socializing with neighbors, attending religious service, volunteering, having a library card, and voting.

Cultural engagement is an organization-wide mandate that involves everyone from the box office to the board.

appendix



Woodturning Center – Woodturning Center's Resource Library

The full reports for each of the following studies can be found at www.philaculture.org/research-into-action:

Cultural Engagement Index

WolfBrown, March 2009

Culture & the Arts Survey

Penn, Schoen & Berland on behalf of LaPlaca Cohen, December 2007

**Demographic Trends and Forecasts
in the Philadelphia Region Study**

Delaware Valley Regional Planning Commission, April 2008

Engage 2020 Focus Groups

Maureen Craig, May 2009

**Paid Patronage in Philadelphia:
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Target Resource Group, May 2009

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Bucks County Library System

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The Food Trust

Gloucester County Library System

Montgomery County Library System

Pennsylvania Real Estate

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A complete listing of photo credits can be found at www.philaculture.org/research-into-action.

**Cultural Engagement Index
Town Meetings**

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Beth Yeagle

**Demographic Trends and
Forecasts in the
Philadelphia Region**

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Delaware Valley Regional
Planning Commission

Engage 2020 Focus Groups

Maureen Craig
Focus group participants

**Paid Patronage In Philadelphia:
Migratory Trends and
Growth Factors**

Will Lester
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Target Resource Group
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the Performing Arts
Arden Theatre
Curtis Institute of Music
Franklin Institute
Independence Seaport Museum
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Opera Company of Philadelphia
Painted Bride Art Center
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