
Arts for Delaware's Future

Audience Research

Community Meeting Presentation

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Audience research and planning for the mission-driven world.

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Our sincere appreciation goes to:

- The Longwood Foundation
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 - Delaware Art Museum
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 - Delaware Theatre Company
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 - The Grand Opera House
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 - Sarah Lee
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 - Jonathan Stringfield

Today's focus

1. Overview of the research
2. Key findings from stakeholder interviews
3. Key findings from cultural consumer research

Overview of the research

Background: Why does Arts for Delaware's Future exist?

- To increase audiences for arts organizations in Wilmington

- To collaborate and reinforce the resources of the individual arts organizations

- To rejuvenate and fortify the Wilmington arts landscape through:
 - improving the Wilmington arts “brand”
 - increasing patron engagement levels (via both attendance and financial donations)

Background: Why has it commissioned this research?

- To learn how Wilmington arts organizations can best attract new patrons and increase engagement among current patrons

- To understand the needs, values, and opportunities among Delaware's arts audiences
 - Both people currently engaged and those with the potential to participate

- To uncover the current perceptions of the Wilmington arts “brand” and identify areas of opportunity for strengthening that brand

- To identify the geographic “catchment area” in which these arts organizations should focus

Background: A three-phase approach to the AFDF research & strategy challenge

Project Plan:



Today's discussion

Key findings from stakeholder interviews

Stakeholder Interviews: There is a shared perception that the Wilmington arts scene needs rejuvenating

- Many feel that the quality of the arts offerings in Wilmington is sufficiently high to sustain a vibrant cultural scene
 - Pride in the breadth and quality of arts offerings here

- But, a common concern is that the Wilmington arts landscape simply isn't a well-defined "scene"
 - Arts still perceived to be for a select audience, not all residents
 - Not sure Wilmington offers "must-see" experiences
 - Influenced by negative perceptions of Wilmington as a whole

- Competition with Philadelphia (and, to a lesser extent, New York and D.C.) is a very important aspect of this perception
 - Challenge in building the audience in the region between Wilmington and Philadelphia
 - Also for Wilmington-area residents who go to Philadelphia for culture but not Wilmington

Stakeholder Interviews: Ongoing revitalization efforts are critical to the area's success, and the arts can play a greater role

- Wilmington's civic leaders have made economic revitalization a priority
 - Widespread agreement that concentrated downtown revitalization efforts are critical to Wilmington's future
- These efforts can benefit the Wilmington arts scene in multiple ways
 - Improve the overall Wilmington "brand"
 - Create a built-in audience base for Wilmington organizations with more residencies downtown
 - Address the perception that Wilmington is unsafe
- However, while civic leaders recognize that the arts will benefit from economic revitalization, many stakeholders were concerned that leaders do not currently think of the arts as a potential *driver* of revitalization, despite growing evidence
 - Americans for the Arts "Arts & Economic Prosperity" study estimates that the direct economic activity generated by nonprofit arts and culture in Delaware is \$142.4 million, suggesting that it is a strong driver
 - In other cities, there is strong precedent for making the arts a critical input into growth and revitalization strategies
- Several stakeholders perceive that government resources are lacking, and that both the city and the state could be doing more to support the arts

Stakeholder Interviews: Collaboration can be strengthened by reaching out to more arts organizations

- While the five current consortium members should be part of this arts revitalization effort, the intention is that the entire Wilmington area will benefit from the knowledge and success that emerges from the collaboration
 - These five organizations are recognized as important in the Wilmington arts scene, but all arts organizations will be key to the area's success

- But external perceptions are that the consortium does not have sights fully beyond its own immediate interests
 - Some arts organizations feel they have been left out of the process
 - Wariness may be due to a lack of communication about the consortium's intentions and goals

Stakeholder Interviews: The Wilmington arts are in the midst of a critical transition in funding sources

- The decline of corporate funding sources and the under-development of other sources of funding is one of the biggest challenges facing arts organizations here
 - The legacy of significant corporate patronage resulted in relatively little cultivation of private, smaller-scale donors and thus, organizations are lagging in creating development strategies to nurture new sources of funding
 - Stakeholders hypothesized that individual donors have developed the mindset that the arts don't need their help because they have the help of corporate donors
 - These challenges are common to many non-profits in Wilmington, not just the arts

- While it's tempting to think of another corporation stepping in to “save the day,” most recognize that Wilmington's arts organizations need to limit their reliance on single, large entities
 - In many markets, private donations account for 70% of an institution's funding while corporate and foundation support account for 30%; in Wilmington, currently that proportion is switched

Key findings from cultural consumer research

Cultural Consumer Research: Several hypotheses and questions from Phase 1 informed the research and analysis of Phase 2

1. Regional opportunities and differences

- The highest potential for growth will likely come from regions further outside of Wilmington – particularly in nearby counties in PA and NJ
- In particular, by identifying people in those areas who *look* like current patrons but do not yet attend
- However, regional differences may be strong when analyzing opportunities and barriers for each of these areas outside of New Castle County
 - Differences that may require separate, targeted outreach efforts to each of the key regions

2. Crossover among Wilmington arts organizations' patrons

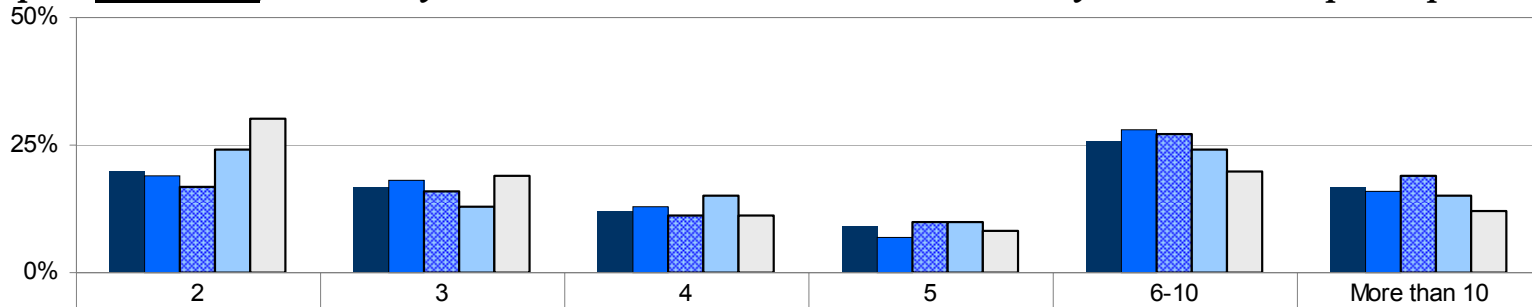
- Crossover among organizations' patrons could be greatly increased
- Optimizing this crossover may be the most efficient way to increase the size of each arts organizations' patron base
 - Directing efforts towards a pool of cultural consumers already identified, and already active in Wilmington arts

3. Wilmington arts "brand"

- A lack of awareness of and negative perceptions about Wilmington's cultural offerings contribute to audience acquisition challenges
 - Civic/cultural pride in Wilmington is likely a particular challenge for those outside of New Castle County – coupled with the proximity of arts offerings in Philadelphia (and NYC)

Cultural Consumer Profile: The average cultural consumer participated in approximately 8 activities in the last year

“In the past 12 months, how many arts or cultural activities or events have you attended or participated in?”

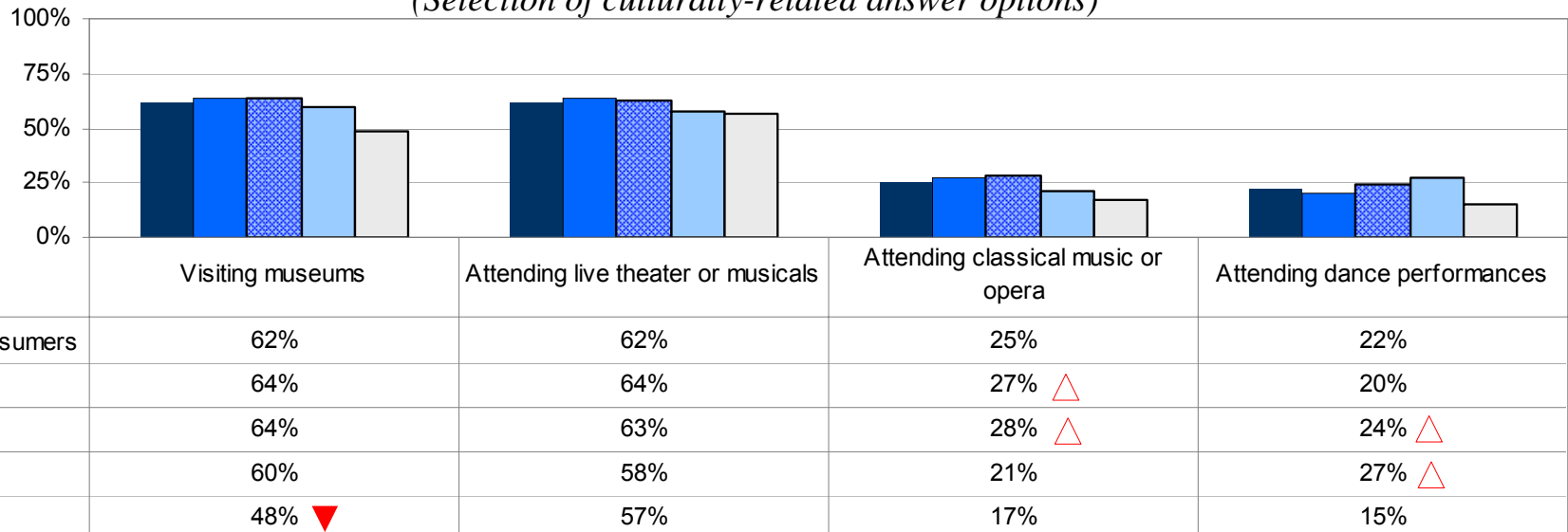


	2	3	4	5	6-10	More than 10	Mean # of Activities
Overall - Cultural Consumers	20%	17%	12%	9%	26%	17%	8.3
New Castle County	19%	18%	13%	7%	28%	16%	8.8 △
Pennsylvania	17%	16%	11%	10%	27%	19%	9.3 △
Downstate Delaware	24%	13%	15%	10%	24%	15%	6.7
New Jersey	30% △	19%	11%	8%	20%	12%	5.6

- 80% of the sample had participated in more than the minimum of two activities that defined our “cultural consumers”
 - Cultural consumers who attend AFDF organizations are much more culturally active than their peers, attending 12 activities in the past year, on average (vs. roughly 8)
- Residents in the two Pennsylvania counties are the most culturally active, while those in New Jersey are the least active
- Implication:
 - Based on the current level of cultural activity among these regions, Pennsylvania appears to be a higher-potential regional target for Wilmington arts organizations, while New Jersey is a lower-potential region

Cultural Consumer Profile: Visiting museums and attending live theater are the most common cultural activities

“Which of the following entertainment or leisure-time activities do you participate in often?”
(Selection of culturally-related answer options)



- Most cultural consumers visit museums and live theater at about equal levels; fewer (about one-quarter) attend classical music or dance
 - In general, Pennsylvania respondents are more active in classical music or dance compared to the other regions
- Implication:
 - Because classical music and opera are generally attended by a smaller sub-set of the culturally-active population, these types of arts organizations may have a more narrow pool of the potential audience to tap into, based on their stated cultural preferences

Cultural Consumer Profile: Longwood, PMA and Winterthur are the most popular local attractions

“How recently did you attend each of the following organizations?”
 (% attending in the past 5 years)

Arts and Cultural Organizations in Wilmington and Philadelphia	Cultural Consumers Overall n=999	New Castle County n=319	Pennsylvania n=415	Downstate Delaware n=144	New Jersey n=121
Longwood Gardens	76%	80%	83%	56%	63%
Philadelphia Museum of Art	61%	47%	79%	38%	59%
Winterthur Museum & Country Estate	50%	69%	46%	39%	29%
DuPont Theatre	36%	61%	21%	31%	24%
Delaware Art Museum	35%	61%	21%	29%	17%
Hagley Museum	34%	61%	21%	27%	17%
The Grand Opera House <i>(other than for the Delaware Symphony or OperaDelaware)</i>	33%	65%	19%	22%	11%
Delaware Museum of Natural History	32%	54%	21%	24%	18%
The Philadelphia Orchestra	31%	19%	48%	16%	24%
Delaware Theatre Company	26%	47%	12%	26%	15%
Delaware Center for the Contemporary Arts	16%	31%	7%	15%	9%
Delaware Symphony Orchestra	15%	26%	10%	15%	5%
OperaDelaware	11%	20%	7%	10%	3%
Christina Cultural Arts Center	11%	22%	5%	5%	7%
First State Ballet Theatre	7%	10%	5%	9%	2%

- In total, 51% of cultural consumers have attended at least one of the AFDF organizations in the past five years
- This is greatly influenced by region
 - New Castle residents are significantly more likely to attend these institutions
- But 36% do not come to Wilmington arts at all
- Implication:
 - The untapped potential appears to be substantial: one-third of the region’s culturally-active population has *not* been to a Wilmington arts institution in the past five years

AFDF Awareness: Cultural consumers most readily associate Winterthur and The Grand with Wilmington’s arts landscape

“When you think about specific arts or cultural institutions in the Wilmington area, which come to mind?”

(Open-ended question)

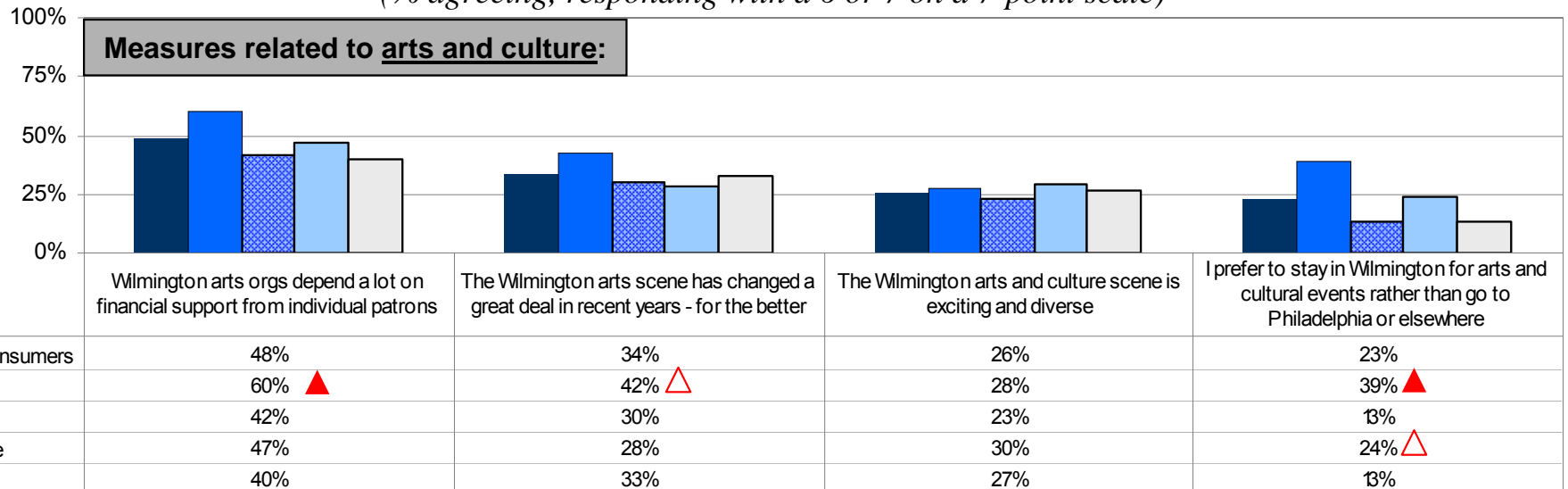
Unaided Awareness	Cultural Consumers Overall	Unaided Awareness	Cultural Consumers Overall
Winterthur	17%	Playhouse Theatre	4%
The Grand	16%	Franklin Institute	3%
Longwood Gardens	15%	Delaware Symphony Orchestra	2%
DuPont mentions (<i>Hotel, Museum, general</i>)	14%	The Riverfront	2%
Delaware Art Museum	13%	OperaDelaware	2%
Hagley Museum	8%	Children’s Theatre	2%
Brandywine (<i>Zoo, general</i>)	7%	Philadelphia Orchestra/Kimmel Center	2%
Philadelphia Museum of Art	6%	Christina Cultural Arts Center	1%
Unnamed arts or cultural organization mentioned (theatre, opera, or orchestra, museum, etc.)	6%	<i>None</i>	27%
Delaware Theatre Company	5%	<i>Other</i>	31%
Delaware Museum of Natural History	5%		

- However, 27% weren’t able to list *any* arts or cultural institutions in the Wilmington area
- Implication:
 - All Wilmington arts institutions could better market – and differentiate – themselves to have higher top-of-mind awareness among cultural consumers

Wilmington Brand Position: Wilmington’s cultural “brand” shows room for improvement – particularly outside of New Castle

“Do you agree or disagree with each of the following statements?”
 (% agreeing, responding with a 6 or 7 on a 7-point scale)

Chart 1 of 2

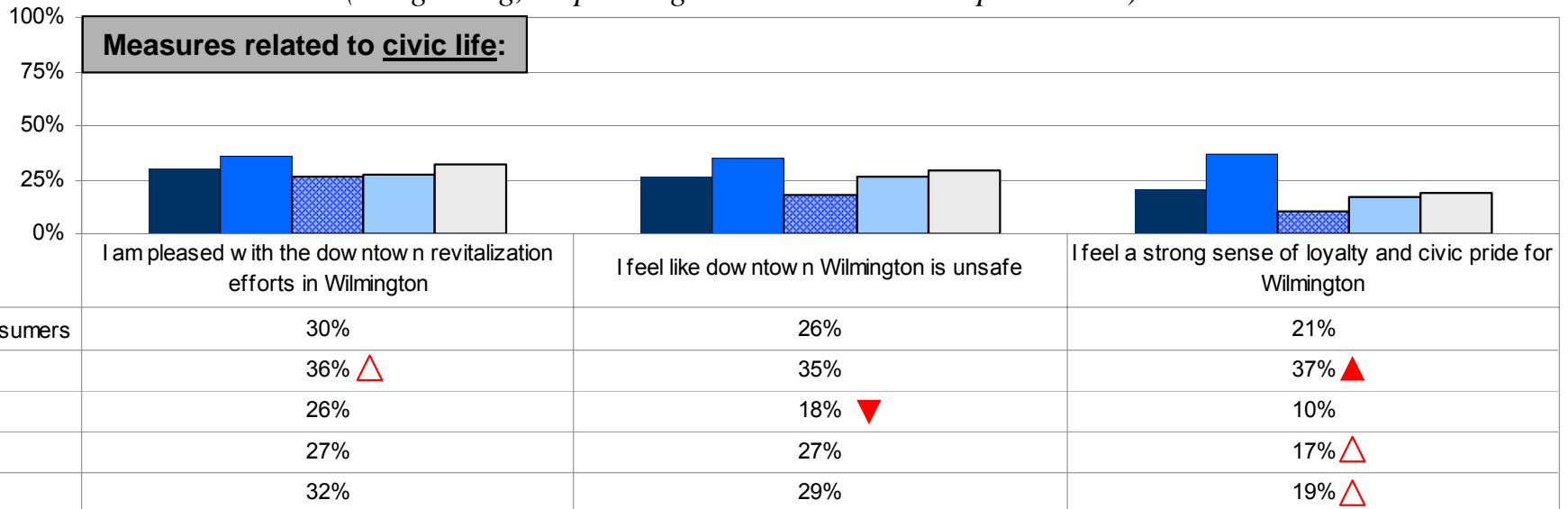


- Among cultural consumers, Wilmington’s brand position – particularly as an arts scene – is in need of improvement
 - Even in New Castle County, only 28% of cultural consumers describe the Wilmington arts scene as “exciting and diverse”
 - While more are willing to say that Wilmington’s arts scene has changed for the better in recent years, the overall low numbers here suggest that there is still a long way for Wilmington’s reputation to go
- Implication:
 - This confirms a finding garnered from the Phase 1 Stakeholder Interviews, in that perceptions of the Wilmington arts scene are an important challenge facing all Wilmington cultural organizations and will need to be addressed as part of the consortium’s efforts

Wilmington Brand Position: Pride in Wilmington as a whole is also flagging

“Do you agree or disagree with the following statements:”
 (% agreeing, responding with a 6 or 7 on a 7-point scale)

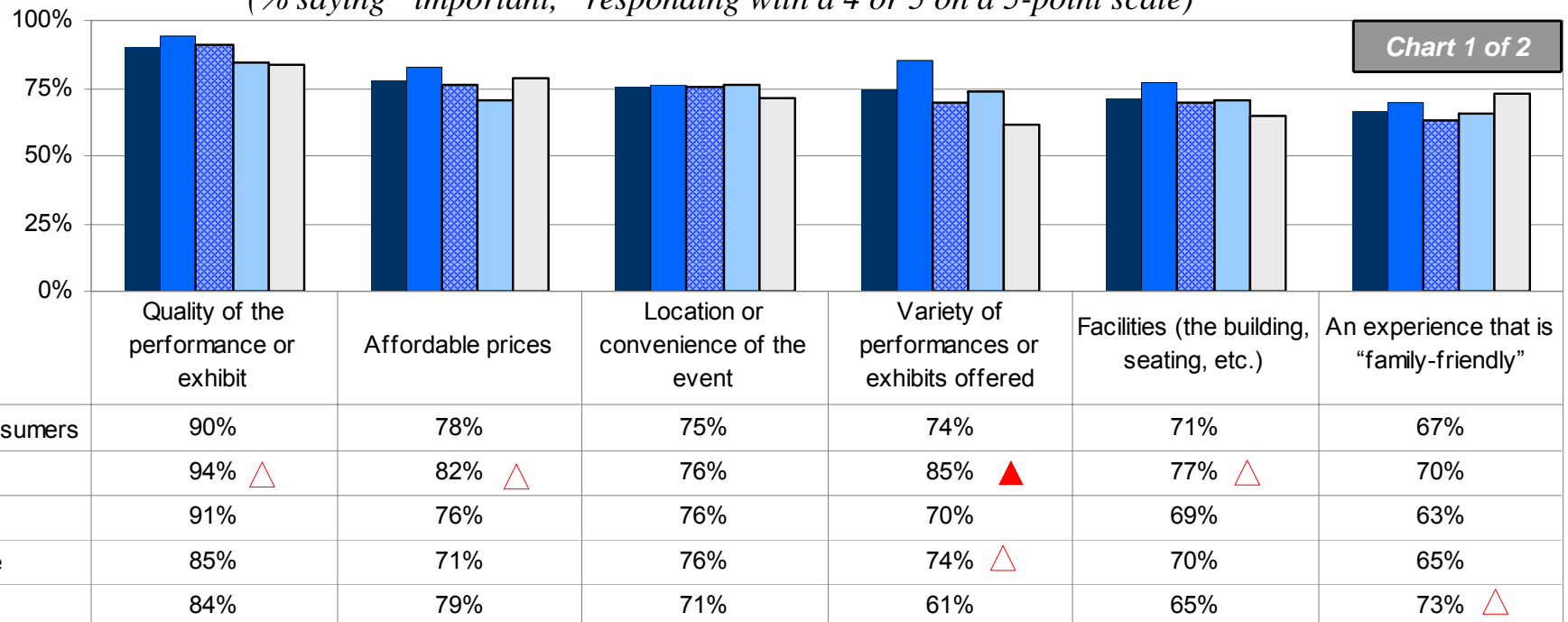
Chart 2 of 2



- While New Castle County residents are warmer towards Wilmington as a whole, there is still substantial room for Wilmington’s brand position to be stronger
- Wilmington’s safety is only a strong concern for a quarter of cultural consumers; while higher than would be ideal, it does not appear to be a strong barrier to cultural participation
- Implication:
 - Changing perceptions about Wilmington as a whole – particularly with respect to safety – should be much lower priority for arts organizations than addressing perceptions of the Wilmington arts scene. This is good news: arts organizations can tell a contained story about what Wilmington has to offer in terms of arts and culture, rather than convince the community that every aspect of Wilmington is desirable.

Decision Influences: Cultural consumers are most concerned with the quality of the cultural events that they attend

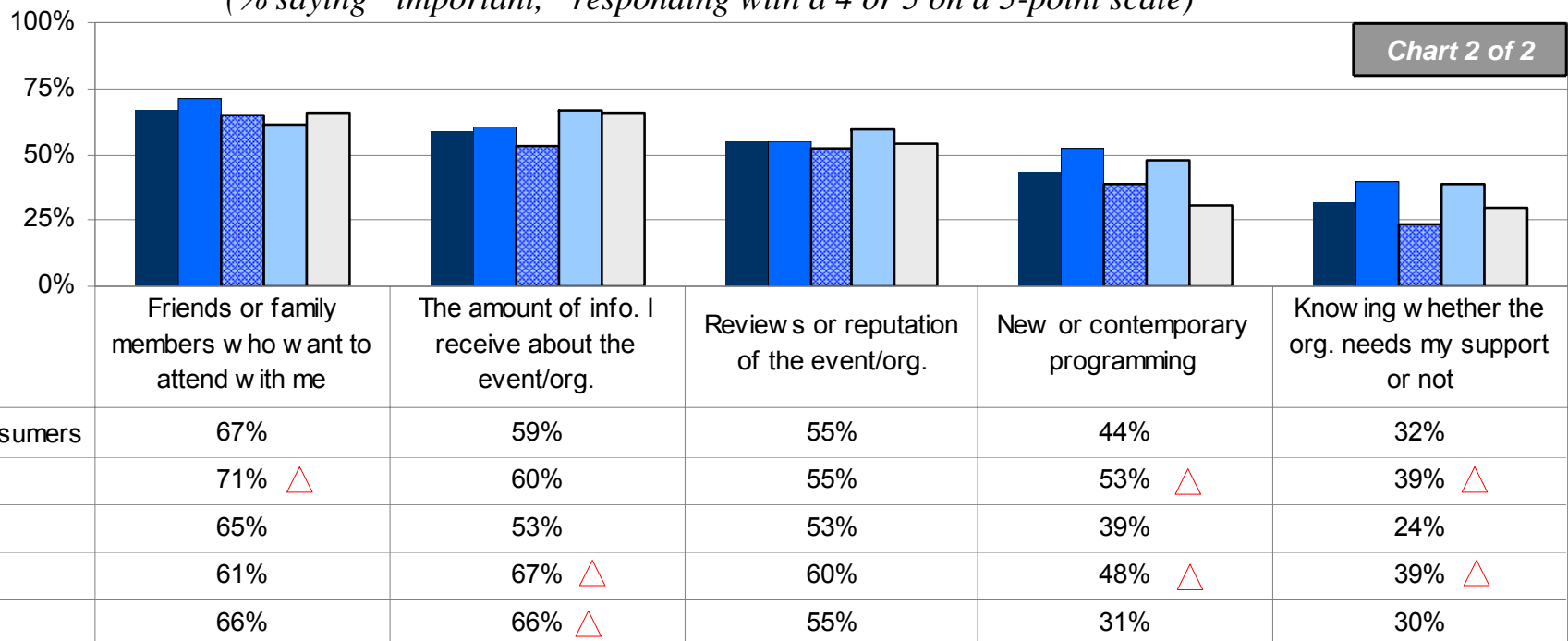
“How important to you are each of the following when deciding whether to attend an arts or cultural activity or event?”
 (% saying “important,” responding with a 4 or 5 on a 5-point scale)



- Most also consider the convenience of events’ price and location
- Younger cultural consumers are more focused on quality, price, and “family-friendliness” than older respondents
- Implication:
 - A high-quality experience is a necessary building-block in growing the audience – but it is not sufficient on its own: logistics must also meet the practical parameters that audience members have in mind
 - Location and convenience will be an asset to grow the arts audience within New Castle County; however, because that is equally important for cultural consumers in all regions, convenience could be a challenge to overcome in other regions

Decision Influences: Philanthropic considerations are not driving cultural attendance for much of the audience

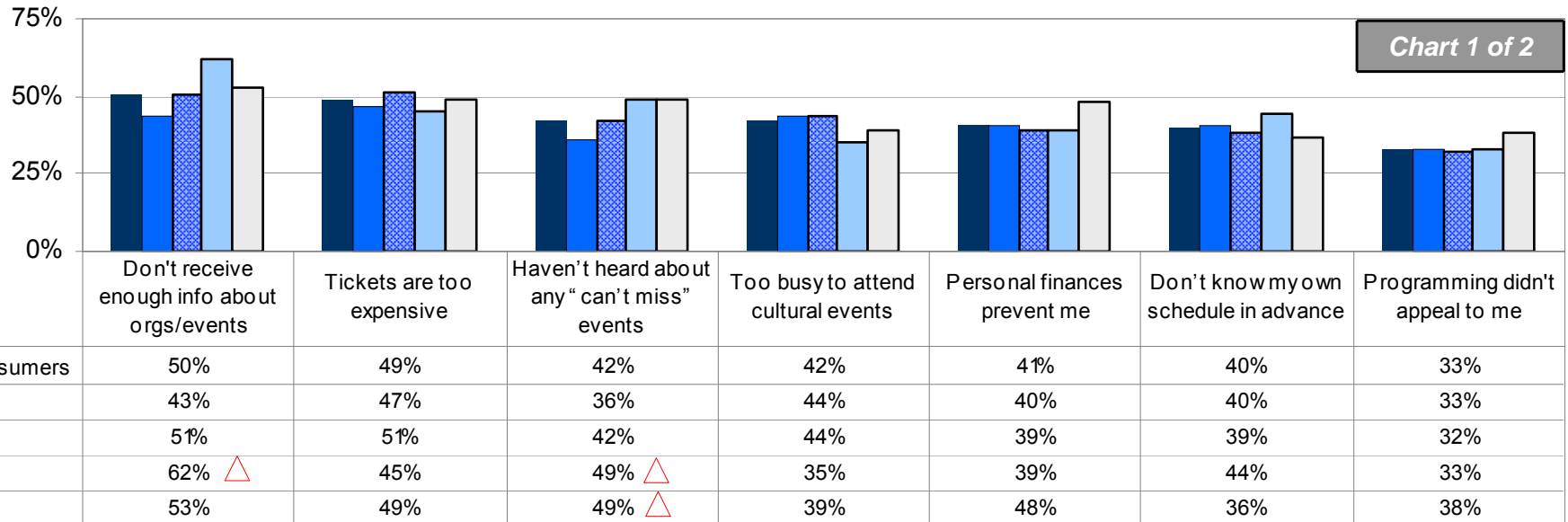
“How important to you are each of the following when deciding whether to attend an arts or cultural activity or event?”
 (% saying “important,” responding with a 4 or 5 on a 5-point scale)



- Delaware residents are paying *more* attention to the philanthropic needs of the organizations they attend, but this is still a lower-importance factor for them
- Receiving sufficient information is of greater importance for downstate and NJ cultural consumers, compared to other regions
 - This could act as a barrier to attendance; if these consumers are not receiving information about an organization, they may be unlikely to seek it out on their own
- Implications:
 - Messaging focused on organizations’ financial “need” is not likely to be a salient motivator
 - To the degree that downstate DE and NJ *are* regional targets, ensure that the information flow to culture-goers in those areas is ample; they will be most influenced by communications they receive

Decision Influences: The biggest attendance barriers for cultural consumers are lack of information and ticket prices

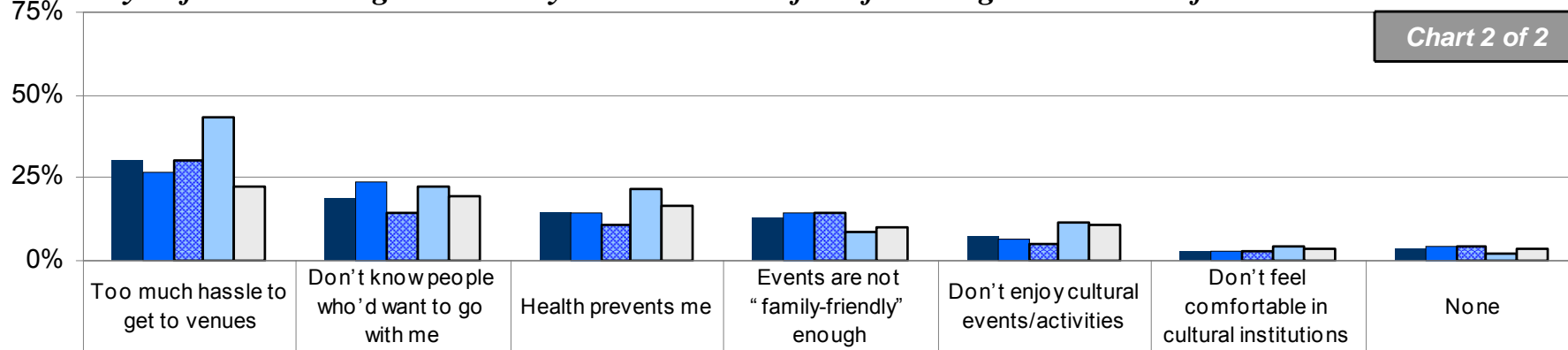
“Please think about what has prevented you, personally, from attending cultural events/activities in the past 12 months – or prevented you from attending more than you did. Which of the following issues were a factor in that decision?”



- However, there is not a clear consensus here: there is not a single barrier that is preventing cultural attendance for a substantial majority of cultural consumers
- That said, lack of information seems to be particularly strong for downstate respondents
 - Although receiving information drives cultural decision-making for downstate residents, its absence is a big reason that they aren't attending as often as they might
 - Moreover, lack of information does appear to be dampening cultural participation: those who cited either "I don't receive enough information" or "I haven't heard about any 'can't miss' events" participated in significantly fewer cultural events overall (than those who cited other barriers)
- Implication:
 - This data suggests that concerted marketing efforts are critical to the success of Wilmington arts organizations – whether done so jointly or individually

Decision Influences: The travel barrier is mild for most – but is more acute for downstate cultural consumers

“Please think about what has prevented you, personally, from attending cultural events/activities in the past 12 months – or prevented you from attending more than you did. Which of the following issues were a factor in that decision?”

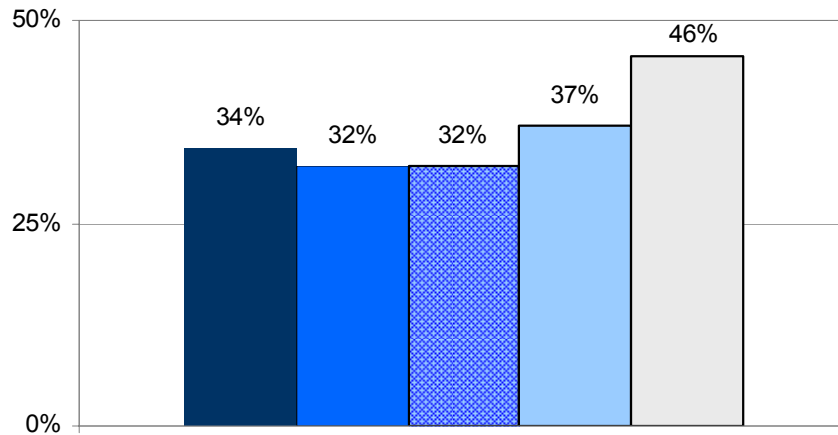


	Too much hassle to get to venues	Don't know people who'd want to go with me	Health prevents me	Events are not "family-friendly" enough	Don't enjoy cultural events/activities	Don't feel comfortable in cultural institutions	None
Overall - Cultural Consumers	30%	19%	14%	13%	7%	3%	4%
New Castle County	27%	24% △	15%	14%	6%	3%	4%
Pennsylvania	31%	14%	11%	15%	5%	3%	5%
Downstate Delaware	43% ▲	22% △	22% △	9%	12% △	4%	2%
New Jersey	22%	20%	17%	10%	11%	3%	3%

- In fact, downstate cultural consumers appear to respond more strongly to certain other barriers as well, namely:
 - Not having companions to attend with, health issues, milder enjoyment of cultural activities in general
 - However, with the exception of those who say that they don't enjoy cultural activities, these barriers do *not* appear to be limiting the level of cultural activity that downstate cultural consumers engage in overall
- Implication:
 - Arts institutions may have to work harder to convince downstate cultural attendees to drive to Wilmington – but they do participate in Wilmington culture so there is potential

Decision Influences: Roughly one-third consider the economic downturn a hindrance to cultural participation

*“Do you agree or disagree that:
the economic downturn has affected my participation in arts and culture?”*
(% agreeing, responding with a 4 or 5 on a 5-point scale)

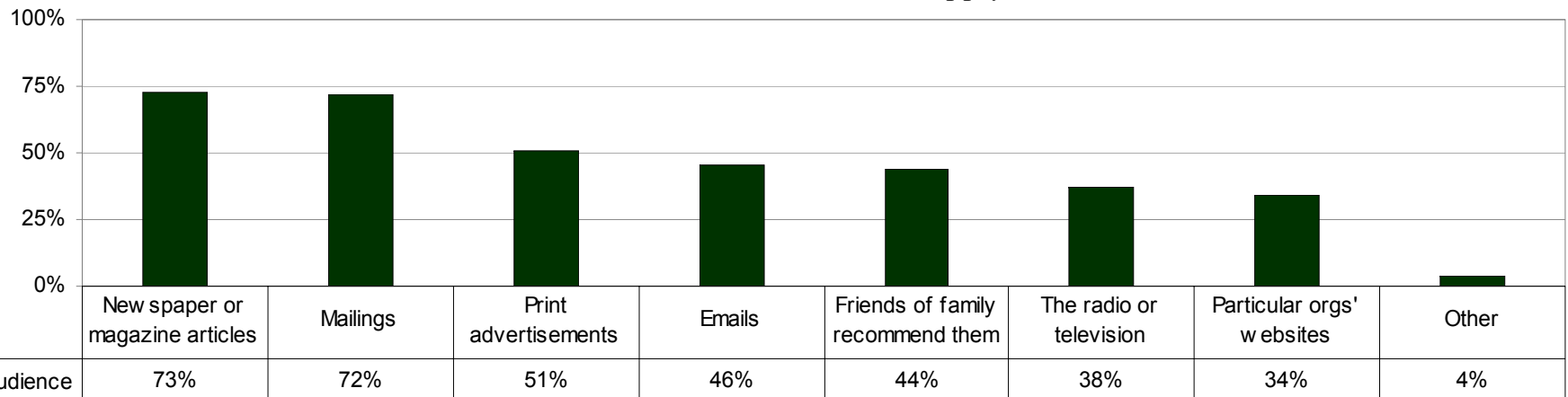


Overall - Cultural Consumers	34%
New Castle County	32%
Pennsylvania	32%
Downstate Delaware	37%
New Jersey	46% △

- New Jersey cultural consumers are most likely to feel that broader economic circumstances are playing a role in their cultural decision-making
 - We also found that New Jersey residents were most likely to cite personal finances as a barrier to cultural participation (though not to a statistically significant degree)
- Implication:
 - While the economy is not the biggest challenge facing Wilmington arts organizations, it is an important component of the overall landscape facing them
 - Further, the perceived influence of this economic situation may continue to strengthen

Decision Influences: Traditional media and mailings reach much of the arts-going audience

*“How do you typically hear about arts and cultural events?”
(Please select all that apply)*

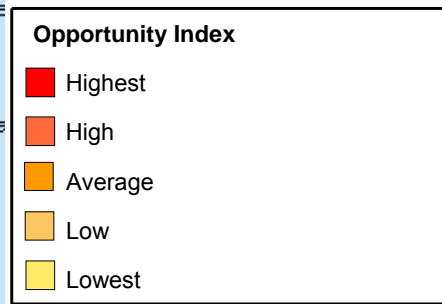
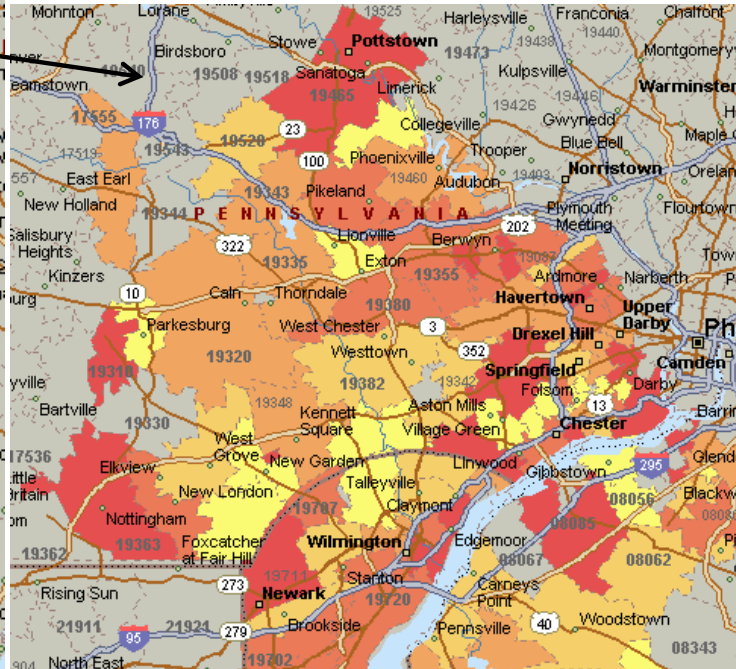
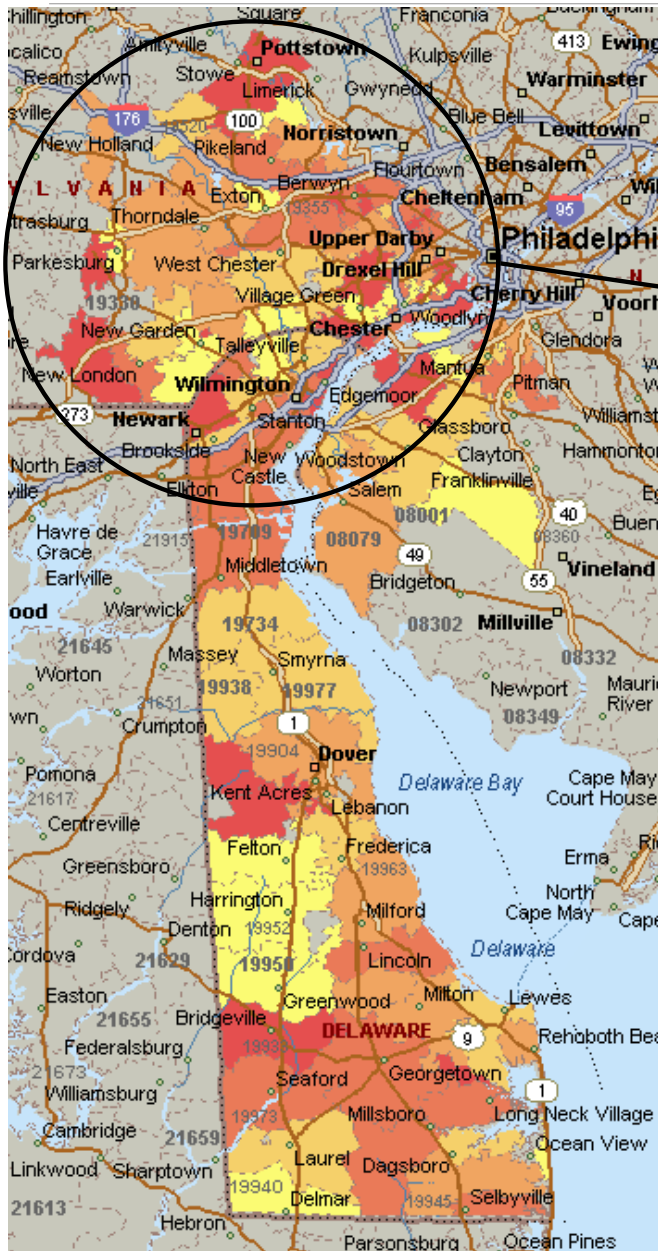


- While these questions were asked of just the patrons of the five AFDF organizations, the findings are likely relevant to all Wilmington-area arts organizations
- Sources of information used are sharply different for younger versus older audiences
 - Younger audiences are more likely to use email, word of mouth, and websites to learn about cultural events
 - Older audiences rely on traditional sources: mailings and print advertising
- Implications:
 - Marketing plans need to include many modes of communication to reach audience segments across the age distribution
 - Communicating to cultural consumers through local newspapers about revitalizing Wilmington’s (and Delaware’s) arts landscape could engender support for arts organizations

High-Potential Growth Opportunities: Slover Linett created a model to identify audience segments of highest potential

- We use multivariate techniques to identify audience segments with high potential for audience growth
 - We identified the salient demographic predictors of the number of ticket buyers in each ZIP code in the broad Wilmington community
 - We identify the salient attitudinal and behavioral predictors of recent AFDF attendance (within the past year) among cultural consumers
 - We model these predictors using logistic regression analysis
- Our model predicts that the profile of likely AFDF attendees is characterized by:
 - Being highly culturally-active and frequent participants in many forms of cultural/leisure activity (including dance, live theater, museums, and going to parks)
 - Having a taste for programming that is both varied and contemporary
 - Being focused on the philanthropic needs of the organizations they attend
 - Unlikely AFDF attendees are characterized by:
 - Needing a lot of information about an event – including media reviews and personal testimonials from friends or family that an event can't be missed – to be persuaded to attend
 - Attending zoos and aquariums more frequently than other cultural consumers
- Geographic profiling identifies particular high opportunity ZIP codes
 - We compute the average likelihood of attendance among non-patrons in each ZIP code in Delaware, Chester, and Delaware Counties in Pennsylvania, and selected areas in New Jersey
 - We then map the opportunity in each ZIP code

High-Potential Growth Opportunities: High-potential areas are dispersed throughout the region



- Highest opportunity ZIP codes are found in all 4 regions, with the greatest number in Pennsylvania
 - Although New Jersey continues to appear lower-priority as a region, there are a few ZIP codes that should be considered high-priority targets
- It is notable that New Castle County has a number of high opportunity areas – although much of the potential audience in New Castle County already attends Wilmington-area arts organizations there are still opportunities to grow the local audience

Conclusions

Conclusions

- I. Among the area's cultural consumers, about one-third have not been to any Wilmington-area arts institution in the past 5 years
 - This is a sizable potential audience for arts organizations to tap into

- II. Increasing awareness of and familiarity with Wilmington-area arts organizations among cultural consumers could have a substantial impact on attendance
 - Increasing awareness is a critical first step to appealing to the sizeable population of culturally-active people in the greater Wilmington region who do *not* currently attend arts locally
 - Overall awareness of many local arts institutions is low – and awareness is a prerequisite to reaching the threshold of interest that leads to a motivation to attend. While there are certainly other barriers to attendance to address among those who *are* aware of the institutions (and deciding not to attend), the passive barrier of lack of awareness and familiarity is the more substantial obstacle that organizations must first contend with

- III. There is also substantial opportunity to increase patron crossover *within* the Wilmington arts community
 - This strategy for audience acquisition can be made easier by each organization's shared commitment to promoting cross-cultural engagement of their own patron bases

Conclusions

- IV. Currently, Delaware cultural consumers exhibit a stronger affiliation with the Wilmington-area arts organizations than do people from out-of-state
- This group should be careful not to disregard New Castle County – including Wilmington itself – for its growth potential (as well as maintenance of current audiences)
 - In many ways the high-potential non-patrons living in New Castle County are the lowest-hanging fruit; barriers of awareness and convenience are much lower for that segment
 - But since penetration is already highest in this region, finding new audiences close by will be incremental rather than extensive
 - These connections will work in arts organizations' favor as they work to engender interest and attendance among a broader swath of Delawareans
 - But it also demonstrates that organizations will need to work harder to create these connections among new audiences from outside of Delaware
- V. Looking outside Delaware, regions within Pennsylvania appear to be areas of highest potential growth for Wilmington-area arts organizations
- Each region has different qualities – and different challenges – that will have explored in this report
 - The two Pennsylvania counties look and behave very similarly to each other, so reaching Chester and Delaware Counties would require the same strategies
 - Putting efforts into drawing new audiences from New Jersey would not likely yield as many new patrons as focusing on these other areas will

Conclusions

- VI. Perceptions of the Wilmington “brand” must be improved before significant headway is to be expected in revitalizing the arts scene
- Developing a broader audience base for the arts in Wilmington is a challenge for the entire arts community
 - Even among New Castle County residents active in Wilmington’s cultural offerings, there is only a tenuous sense that the city’s arts landscape is vital and that it has been making headway for the better
 - While *disagreement* with the vitality of the arts landscape overall isn’t overwhelming, we would have expected to see greater “championing” of Wilmington’s at least from the most active segment living closest to the city
 - But, these discouraged perspectives on the state of Wilmington’s arts scene are strong evidence of the need and value of a concerted collaboration among arts organizations, the city, and the state to improve these perceptions

Questions and Discussion