
CHICAGO COMMUNITY TRUST / EXCELLENCE IN DANCE INITIATIVE
Audience Development Project: Research Phase

Toward an Audience Engagement Framework: Findings from the Dance Leader Interviews and Literature Review

August 14, 2003



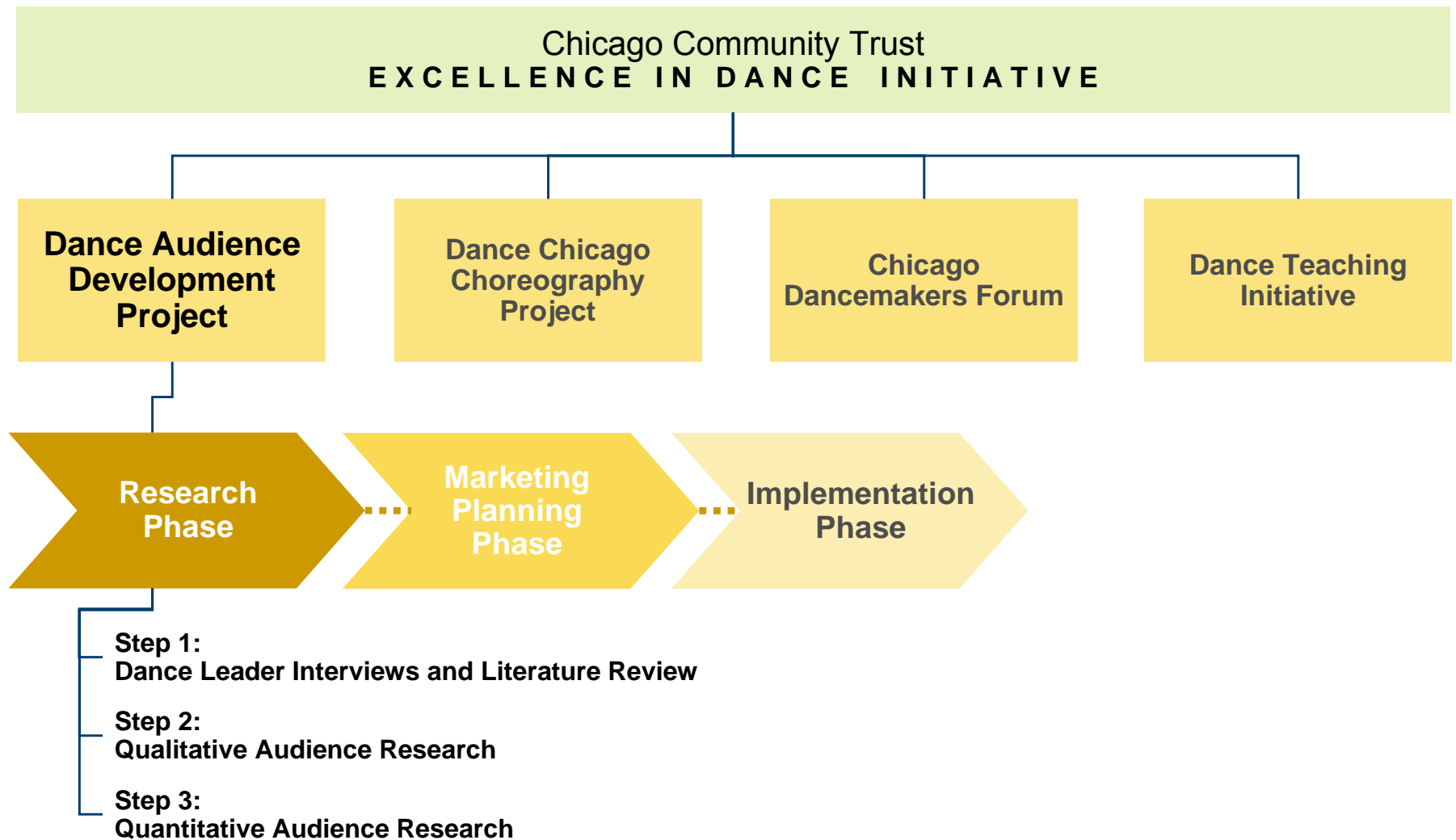
Audience research and planning for the mission-driven world.

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Agenda / Contents

- Project At a Glance
- Dance Leader Interviews – Key Findings (20 minutes)
- Literature Review – Key Findings & Hypotheses (10 minutes)
- Other Hypotheses and Issues to Research (30 minutes)
- Research Plan (20 minutes)
 - ▶ Focus groups
 - ▶ Quantitative survey
- Appendix
 - ▶ Comparison of Chicago's dance community to dance in other cities
 - ▶ Dance leader interview guide
 - ▶ Four views of the dance audience challenge

The project at a glance



Dance leader interviews

KEY FINDINGS

Methodology

- Selected 12 dance leaders to interview
- Developed interview guide to probe uniqueness of dance in general and Chicago dance (see Appendix)
- Interviewed 12 dance leaders:
 - ▶ dance company leaders
 - ▶ presenters
 - ▶ funders
 - ▶ city of Chicago
 - ▶ dance critics
- Intended for this audience research phase, but some findings can inform the other parts of the *Excellence in Dance* project
 - ▶ management and administration
 - ▶ professional development
 - ▶ performance spaces

Key finding #1: Dance leaders described three ways that audiences connect with dance

- Physically – kinesthetic response
 - ▶ feeling almost like you're doing it yourself
 - ▶ thrill of seeing human beings do amazing things with their bodies
- Emotionally
 - ▶ responding to the aesthetic beauty
 - ▶ responding to the dance's story (but dance isn't always narrative or easily interpreted)
- Intellectually – often a default when there's no emotional or kinesthetic connection
 - ▶ new audiences are likely to fall into this category (feel they have to 'figure it out')
 - ▶ if people can't connect on the first two levels, they try to connect on intellectually (usually find it difficult)
 - ▶ intellectual connection not well supported by the dance community
 - Few offer program notes with substantive insight/interpretation
 - Artistic staff sometimes reluctant to interpret

Key finding #2: Dance leaders had trouble articulating the benefits of attending dance

- To dance insiders, benefits of watching dance are assumed (“givens”) – therefore difficult to put into words
 - ▶ dance has attracted those who share that basic assumption
 - ▶ need to articulate the benefits in order to expand audiences
- Dance is perceived to be more abstract than most other art forms – difficult to describe in terms of effects or benefits

Key finding #3: On the other hand, they identified the barriers in detail

Practical Barriers

- Confusion over different types of dance
- Lack of awareness and name recognition of Chicago dance companies and artists
- Lack of easy access to practical information
- High pricing of some companies/performances
- Parking and “hassle” factor

Background Barriers

- Lack of familiarity with art form
 - ▶ Big deficit in dance education compared to other arts (schools rarely have a dance teacher)
 - ▶ People don't grow up seeing great dance (Chicago never had a great ballet company to develop audiences)
- Lack of prominence and history in Western culture, compared to music, visual art

Psychological Barriers

- Intimidation factor
 - ▶ Fear they won't “get it”
 - ▶ Feel like there is something you need to learn in order to understand ‘what they're trying to do up there’
- Abstract nature of dance
 - ▶ Lack of narrative or story means no easy point of entry
 - ▶ The TV generation is more comfortable with something it can describe concretely
- Discomfort with body expression, except in sports
 - ▶ Midwest more conservative than the coasts
 - ▶ Dance still associated with gay culture – homophobia colors responses

Key finding #4: Dance leaders agree that there need to be easier points of entry

- Companies succeed by offering accessible, engaging programming
 - ▶ After they develop a following, can broaden their palette to a more eclectic mix
 - ▶ Dance should turn back toward the goal of entertaining audiences – that doesn't mean selling out
- Companies need to help new/infrequent audiences connect with dance in ways that encourage further exploration
 - ▶ Familiarity with the art form is a key predictor of dance attendance, so dance needs to increase trial while ensuring a positive experience

Key finding #5: Dance leaders have mixed views of the Chicago dance community

- Some said it's growing well and enjoys higher awareness among consumers than in the past
- Others said it has a low profile and is “asking the same questions that were asked 40 years ago”
- Some were in the middle: “getting better but not as good as it should be”
- Shared feeling that dance has traditionally been underserved, under-capitalized
 - ▶ especially versus theater, which is perceived to have more resources
 - ▶ but self-perception as the “poor stepchild” may be self-fulfilling – time to bury it
- Some questioned the cohesiveness of the dance community
 - ▶ With so many small and mid-sized companies, why were there so few non-presenting organizations at the recent dance community event (July 15)?

Key finding #6: Dance leaders said mediocre dance is a problem for everyone

- Relative ease of putting on a new dance performance means there is a wide range of quality in the marketplace
 - ▶ A bad experience can turn new/infrequent audiences off to dance as a category – they may not know that there are many types and companies
- Choreographers have less training today
 - ▶ If dancers don't get into a prestigious company, they may set up their own shop
 - ▶ Less time between graduating and becoming a choreographer means less experience
 - ▶ Some said choreographers are educated less broadly, lack depth in liberal arts, human nature
- Gets to larger issue of professional development
 - ▶ Dance Center at Columbia College is refining its curriculum, which may help
 - ▶ Dancers need more spaces to network, learn from each other
- Problem not limited to Chicago
 - ▶ Seen as a nationwide issue, even in New York

Key finding #7: Dance leaders spoke of related problems with repertoire

- Repertoire isn't held in common and repeated as it is in other art forms
 - ▶ Very few cash cows (e.g. Swan Lake)
 - ▶ “Lack of a common language” in the dance community
- Exacerbated by the perception that audiences want to see something new (new works, new moves)
 - ▶ Forces companies to create new works
 - ▶ Places strain on dance companies
- Demand for good works is greater than the supply of talented choreographers
- Works performed are sometimes not up to high quality standards

Key finding #8: Chicago needs to host more national and international companies

- Chicago perceived to be insular because audiences and dance professionals don't see what else is going on nationally
 - ▶ Negative audience cycle: people don't see the art form at its best, so they don't connect to dance as a category
 - ▶ Negative performer cycle: artists don't expand their minds by seeing other great performances, so their performances aren't as good as they could be
- Needs more mid-sized, less expensive performing spaces for out-of-town artists
 - ▶ Expense of performing here is a barrier for some companies
- Needs a strong entrepreneur who would harness energy and resources to put behind dance

Key finding #9: The dance community's central association plays an important role

- General consensus that there is an opportunity to better assist dance companies in five key areas:
 - ▶ Centralized fundraising
 - help with filing for nonprofit status
 - expertise and manpower for fundraising
 - connections to potential corporate sponsors
 - ▶ Joint marketing
 - smaller companies don't have the expertise or resources to get their message out
 - ▶ Shared mailing list
 - each company currently "re-creates the wheel"
 - ▶ Touring support
 - contacts, guidance, "moral support"
 - would help build Chicago's reputation as a strong dance city
 - ▶ Promoting existing resources
 - Many dance administrators don't know or use what's already available (e.g. mapping project, Department of Cultural Affairs, etc.)

Key finding #10: Chicago dance companies should consider joint marketing

- Nearly everyone said that there were many benefits to marketing dance as a category
 - ▶ Sampler brochure so you can pick and choose your performances
 - ▶ Include all companies, promoting dance as an art form
 - ▶ Use as an entry point for new audiences, to gain trial
 - then make it VERY easy for them to follow-up and buy tickets for companies that they liked
 - ▶ explore new ways of selling (e.g. online, using mapping project data, etc.)
- Put significant resources behind a joint marketing campaign
 - ▶ Raise awareness of dance as a vibrant art form in Chicago
 - ▶ Change current perceptions of dance as inaccessible, abstract and elitist
- Some suggested asking an outside organization (e.g. funder) to manage the project so individual companies' interests and egos don't get in the way

Literature review

KEY FINDINGS

Our sources

1. *Audience Expansion: Strategies, Trends, and Case Studies* (Julia Moran, Chicago Community Trust, 2001)
2. *2002 Survey of Public Participation in the Arts* (National Endowment for the Arts, released 2003)
3. *A New Framework for Building Participation in the Arts* (RAND/Wallace-Reader's Digest Funds, 2001)
4. *Making Culture Count: New Insights on Engaging Arts Audiences* (The New Yorker/ La Placa Cohen, 2003)
5. *Barriers and Motivations to Increased Arts Usage Among Medium and Light Users* (Deborah Obalil, Arts & Business Council of Chicago, 1999)
6. *Diversifying Chicago's Arts Audiences: A Progress Report* (Arts & Business Council of Chicago, 2000)

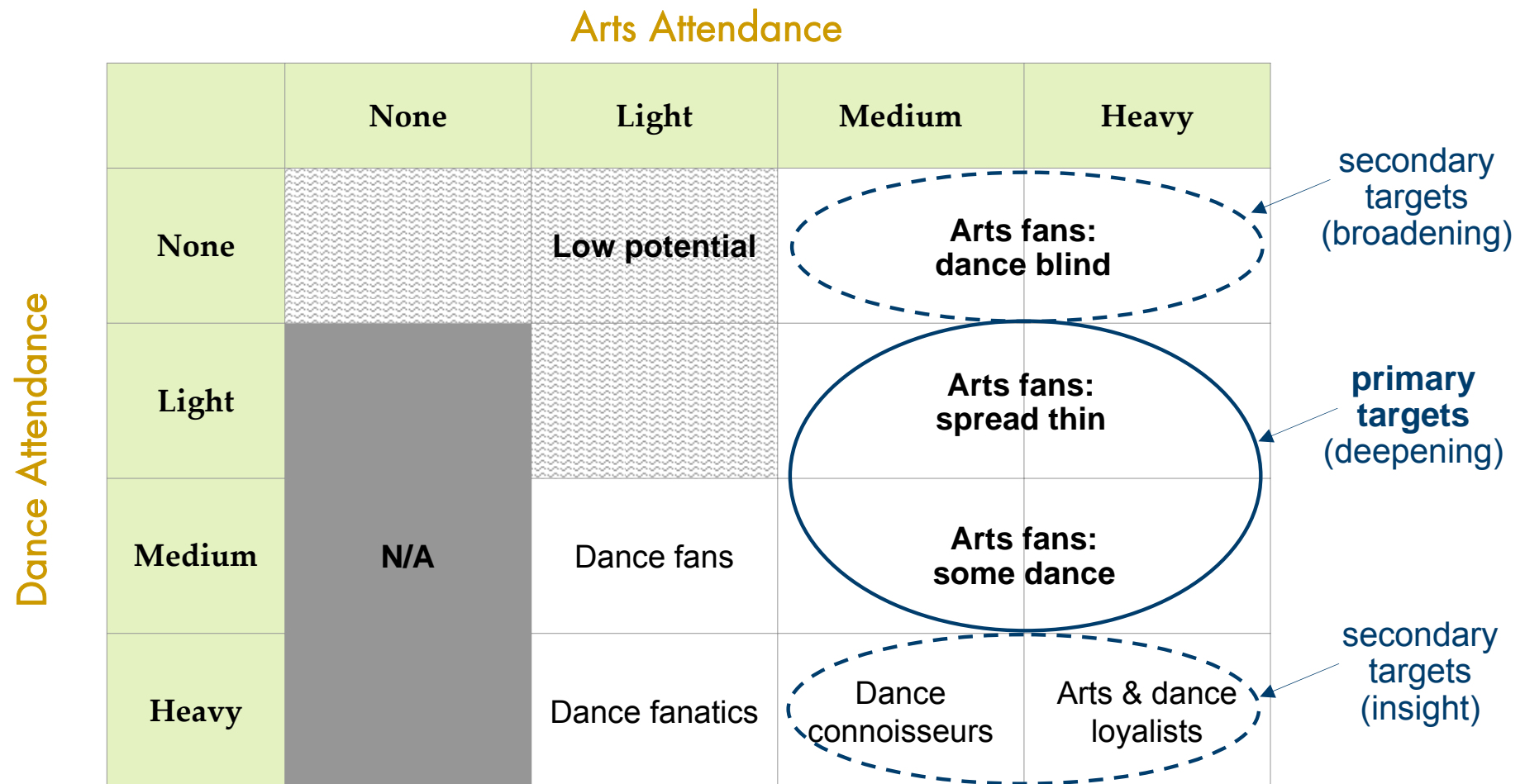
Key findings about how light and heavy users differ

	Light	Medium	Heavy
Practical issues	<ul style="list-style-type: none"> More concerned (parking, transportation, familiarity of venue) More price sensitive More time constrained (kids at home) 		<ul style="list-style-type: none"> Fewer practical concerns (greater familiarity) Less price sensitive Less time constrained (fewer kids at home)
Decision criteria	<ul style="list-style-type: none"> Programs that relate to their lives or cultures Special occasions/events/celebrations Spectacle/entertainment Social or group connections (e.g. knowing someone connected to the performance, going with a club, etc.) Consider the decision riskier, so looking for a “safe” choice 	<ul style="list-style-type: none"> Interested in new experiences, but that doesn’t necessarily mean new works 	<ul style="list-style-type: none"> Favorite or well-reviewed companies and repertoire Newness (premieres, rarities) High artistic quality Inner-directed, less influenced by group activity Consider the decision safer, so not averse to “risky” choice
Social element	<ul style="list-style-type: none"> More likely to come in a group Want experience to be social, informal, and “fun” 		<ul style="list-style-type: none"> More likely to come alone or in pairs Want experience to be focused on art (social component comes before or after)

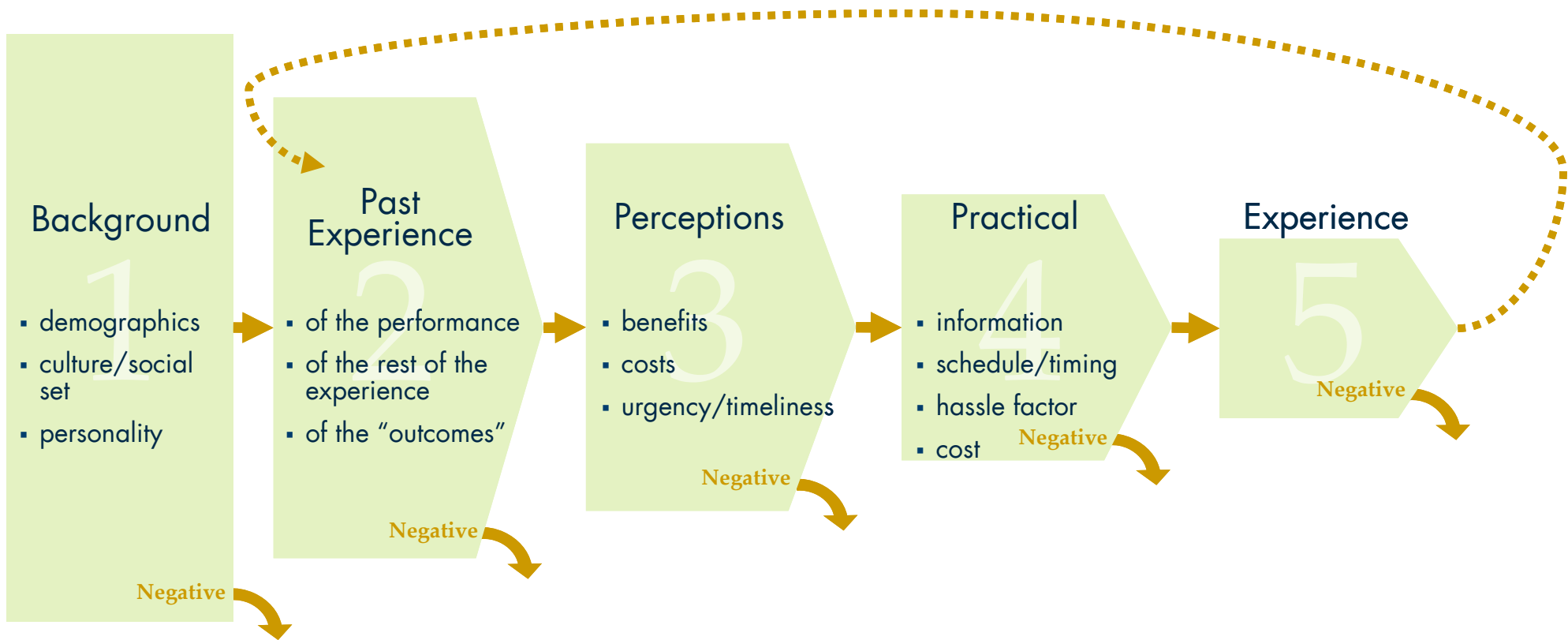
Key findings about how light and heavy users differ (cont.)

	Light	Medium	Heavy
Desired benefits	<ul style="list-style-type: none"> ▪ Enjoyment ▪ Entertainment ▪ Relaxation ▪ Escape ▪ Social or family occasion 	<ul style="list-style-type: none"> ▪ Self-improvement ▪ Stimulation ▪ Newness, discovery ▪ Freedom/escape from daily concerns ▪ Connection ▪ Exposure of kids to arts 	<ul style="list-style-type: none"> ▪ Learning ▪ Stimulation ▪ Appreciating beauty ▪ Spiritual fulfillment ▪ Connection on multiple levels (aesthetic, kinesthetic, emotional, intellectual)
Comfort level going in	<ul style="list-style-type: none"> ▪ Lower: worried they lack the knowledge necessary to interpret or enjoy it 		<ul style="list-style-type: none"> ▪ Higher comfort level with dance ▪ More satisfied with their lives in general
Other	<ul style="list-style-type: none"> ▪ Prefer to be able to decide last-minute ▪ View the experience holistically (arrival, service, ambiance, refreshments, etc. in addition to performance) 		<ul style="list-style-type: none"> ▪ Prefer to plan in advance ▪ View the experience in terms of the performance/quality (other elements considered separate)

Hypothesis #1: Our best audience targets for growth

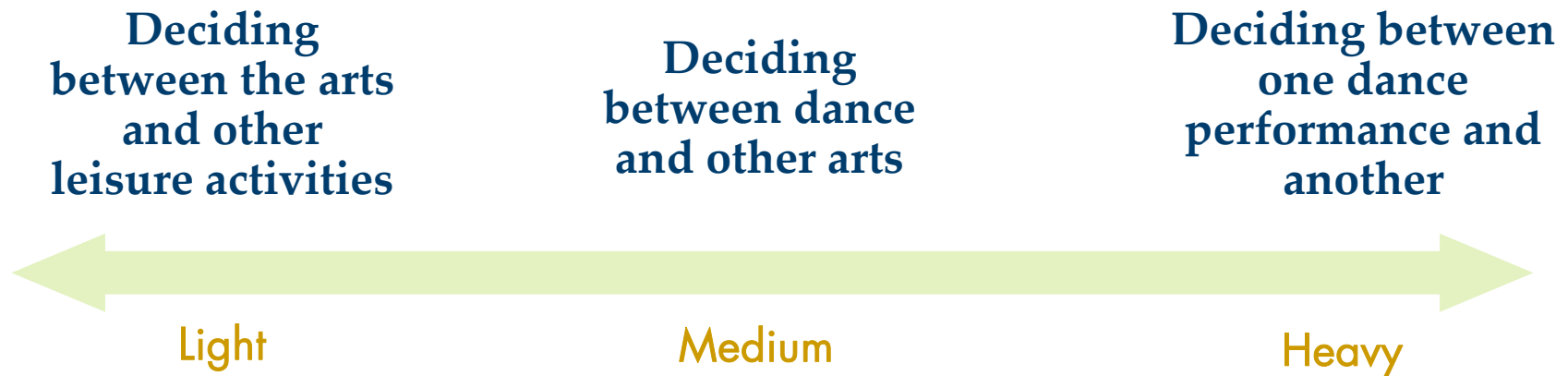


A framework: how people become dance patrons

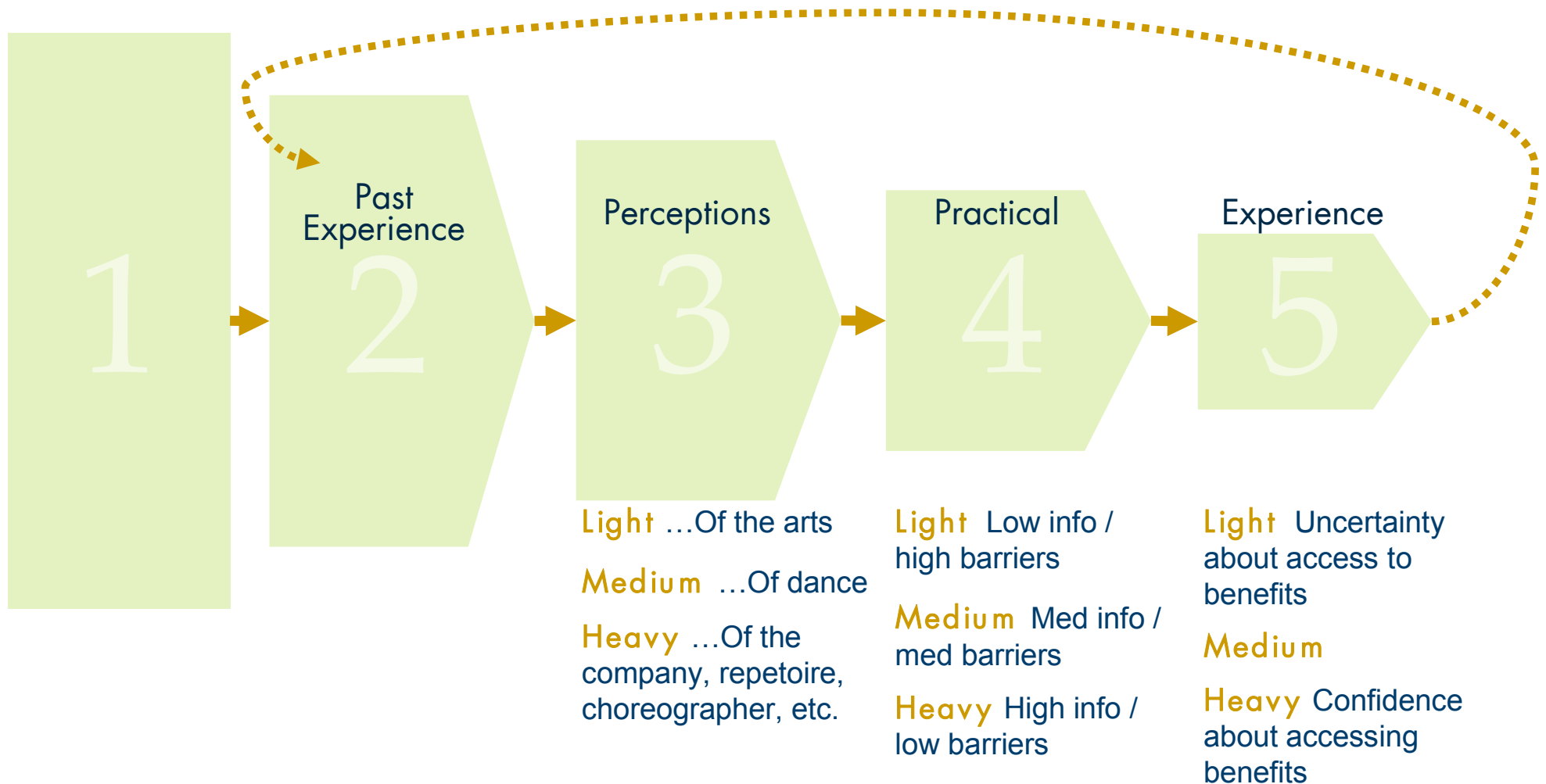


Adapted from *A New Framework for Building Participation in the Arts* (RAND/Wallace-Reader's Digest Funds, 2001)

Hypothesis #2: Light, medium and heavy users move through that cycle on different levels



Hypothesis #2: Light, medium and heavy users move through that cycle on different levels (cont.)



Other hypotheses and issues to research

Hypothesis #3: We can expand audiences by tapping natural connections

- Between one form of dance and another (e.g. ballet to contemporary to ethnic; event/seasonal dance to other dance)
- Between other performing arts (e.g. opera, musical theater, legit theater) and dance
 - ▶ Is dance seen as a “cousin” or extension of these?
- Between participatory dance (folk, swing, hip-hop, etc.) and dance performance
- Between spectator sports and dance performance
- Between visual arts and dance performance (e.g. contemporary art and contemporary dance)

Hypothesis #4: We can build current and future audiences by appealing to families and young people

- Dance is popular in high schools – are they a viable target for dance performance?
 - ▶ What would it take to reach them?
- Parents of all demographics want to expose their children to art and culture – how can we make dance more accessible to families?

Other issues to research

- Do ethnic audiences differ in their perceptions, needs, barriers, etc.?
- What sort of interpretation or support do audiences want from dance companies?
 - ▶ cognitive/explanatory?
 - ▶ emotive (“the choreographer’s passion and excitement”)?
- What is the role of entertainment and “spectacle” in the enjoyment of dance? In the marketing of dance?
- What is the role of the venue in building dance audiences?
 - ▶ Do consumers develop a relationship with a venue?
 - ▶ Do they want to see dance in a venue familiar from other uses?
- Do audiences want to be “present for the creation” of dance (works in progress, rehearsals, “behind the scenes”)?
 - ▶ Would this appeal more to some audience segments than others?
- Do audiences want more social and/or informal experiences at dance performances?

Research Plan

Focus Groups

Quantitative Study

Focus Groups

- Objectives:
 - ▶ Explore the issues raised in the dance leader interviews and literature review
 - ▶ Identify key issues to research in the quantitative phase
 - ▶ Understand perceptions of dance among different ethnicities
 - ▶ Learn how to communicate best with the target audiences
- Methodology:
 - ▶ Seven groups, each with 8-9 participants / 2 triads, each with 3 participants
 - ▶ Conducted weeks of September 8th and 15th, findings presented in early October
 - ▶ incentives: choice of theater/dance tickets or \$50 cash
- Proposed target audiences:
 - ▶ Heavy/medium arts but no dance (“Arts fans - dance blind”): 1 group
 - ▶ Heavy/medium arts, light dance (“Arts fans - spread thin”): 2 groups
 - ▶ Heavy/medium arts, medium dance (“Arts fans - some dance”): 2 groups
 - ▶ Ethnic minorities (heavy/medium arts, medium/light dance): 1 group each with African-Americans and Latinos (Note: all groups will have some ethnic diversity)
 - ▶ Heavy/medium arts, heavy dance (“loyalists” and “connoisseurs”): 2 triads

Focus Groups (cont.)

- Proposed locations:
 - ▶ Downtown (screened for mix of city/suburb residency)
- Open issues:
 - ▶ Securing donated facilities and videotaping for the focus groups
 - ▶ Creation of joint lists (with phone numbers)
 - ▶ Contribution of tickets for incentives

Quantitative Study

- Objectives:
 - ▶ To identify, profile and size the most attractive segments for Chicago's various dance companies
 - ▶ To quantify the importance of specific issues to each segment
 - ▶ To further research any outstanding questions about dance perceptions, motivators, barriers raised in earlier steps
- Methodology:
 - ▶ 700 telephone surveys
 - ▶ Conducted in November
 - ▶ Findings presented in December
- Proposed target audiences:
 - ▶ 500 interviews with cultural consumers (from broad culturally-qualified list)
 - ▶ Supplemented with 200 interviews with medium and heavy dance users from dance companies' audiences
- Open issues:
 - ▶ Creation of cultural consumer list

Appendix

Dance Leader Interviews:

- Chicago compared to other cities' dance communities
- Interview guide

Literature Review

- Four views of the dance audience challenge

Chicago compared to other cities' dance communities

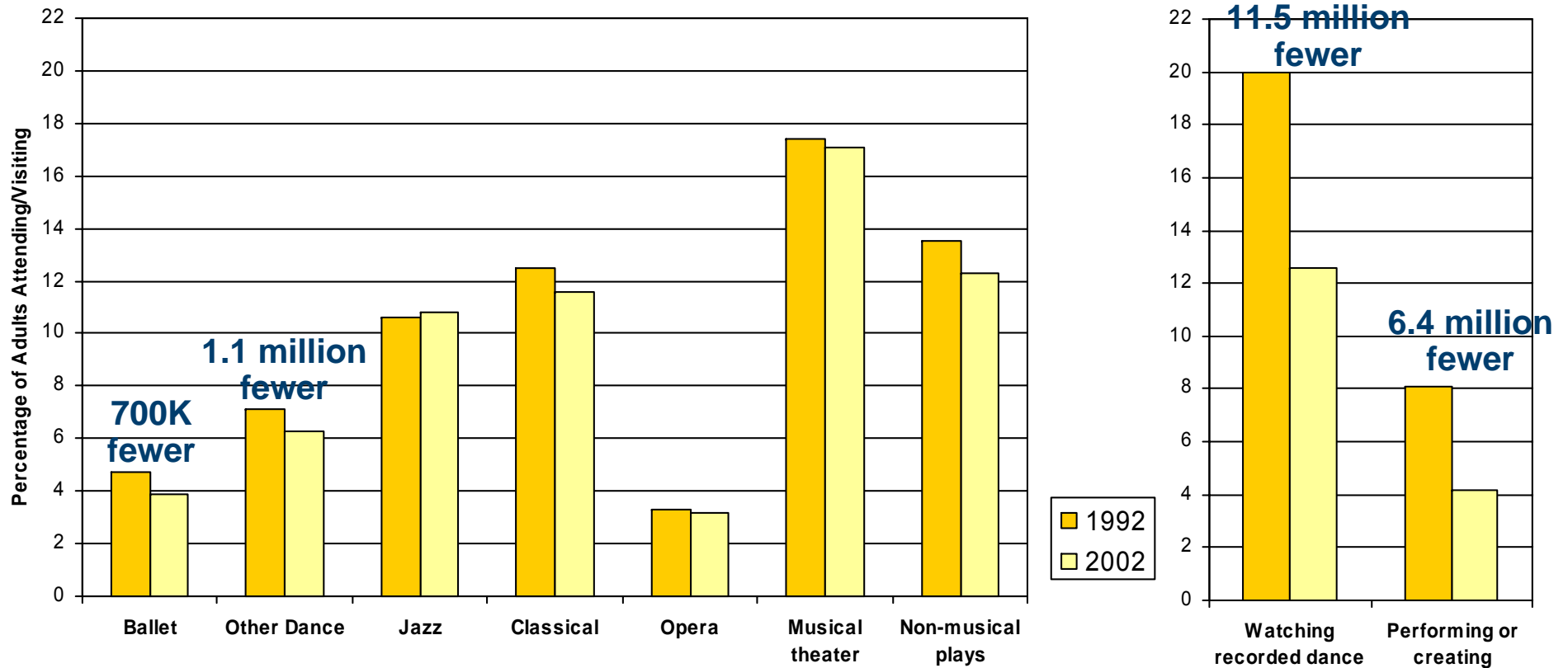
- San Francisco
 - ▶ vibrant community – smaller
 - ▶ support experimental art more
 - ▶ not the same homophobia
 - ▶ more focus on the body/mind/spirit connections
- Minneapolis
 - ▶ strong but small
 - ▶ foundations are able to give individuals money without them being a non-profit (in Chicago one must have 501-c-3 status)
 - ▶ their dance association is the conduit for funding, managing the database, and supporting the artists in other ways (though one person said it has folded)
 - ▶ but doesn't have many companies – no ballet and no one like HSDC
- NYC
 - ▶ people are physically closer together which may make dance more accessible
 - ▶ specific districts are associated with certain aesthetics

Chicago compared to other cities' dance communities

- Seattle
 - ▶ Joan Skinner, visionary leader. Important in identifying new movement techniques. Attract people to study with her

- Montreal
 - ▶ FIND (Festival International de Nouvelle Danse) bi-annual festival of dance from Europe – the only place to see them in North America

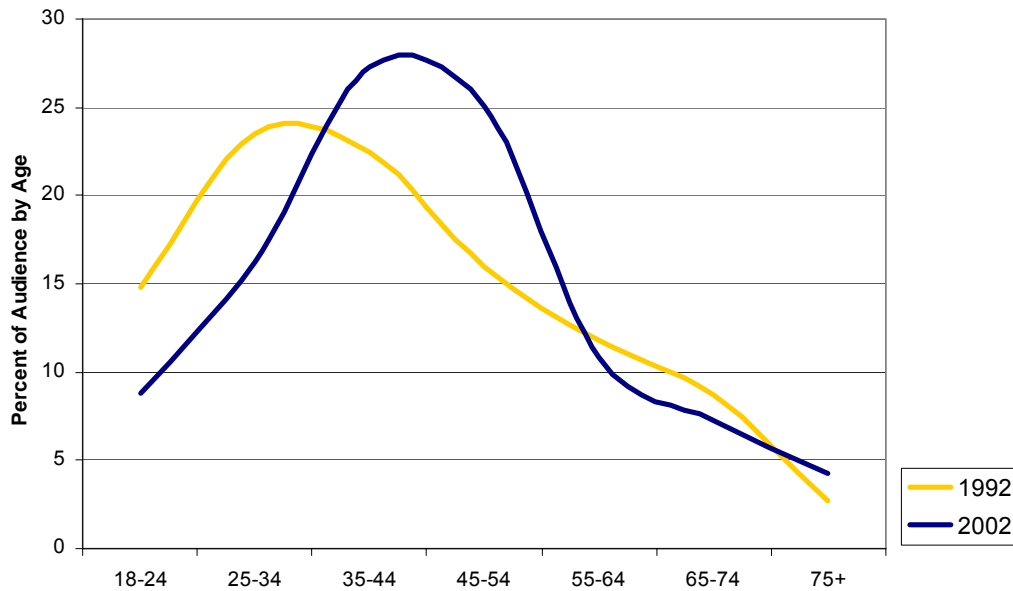
The problem, part 1: The percentage of adults attending dance has declined



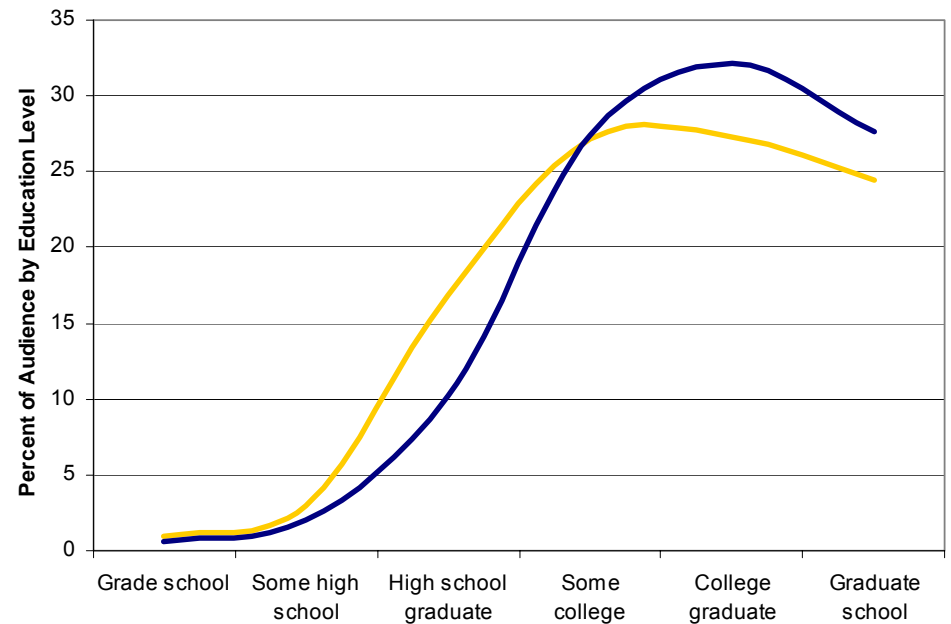
Source: 2002 Survey of Public Participation in the Arts (National Endowment for the Arts, 2003), research note #81

The problem, part 2: The audience is more concentrated demographically

Distribution of Ballet Audience by Age



Distribution of Ballet Audience by Education



Change in median age of ballet audiences between 1992 and 2002:
+4 years (40 to 44)

Change in U.S. population during same period: **+3 years** (42 to 45)

Source: 2002 *Survey of Public Participation in the Arts* (National Endowment for the Arts, 2003), research note #82

The problem, part 3:

The audience is disproportionately heavy arts consumers

“Previous quantitative research has indicated that the majority of current dance attendees, more so than any other art form (perhaps with the exception of opera), fall into the heavy user category of arts consumers.”

-- Deborah Obalil, *Barriers and Motivations to Increased Arts Usage Among Medium and Light Users* (Arts & Business Council of Chicago, 1999), p. 80

The problem, part 4:

“Dance” lacks a clear definition for many people

