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Hubbard Street Dance Chicago and Carol Fox & Associates  
Dance Audience Development Research

## Qualitative Research Findings

Audience Development Steering Committee

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Audience research and planning for the mission-driven world.



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# Background

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Objectives

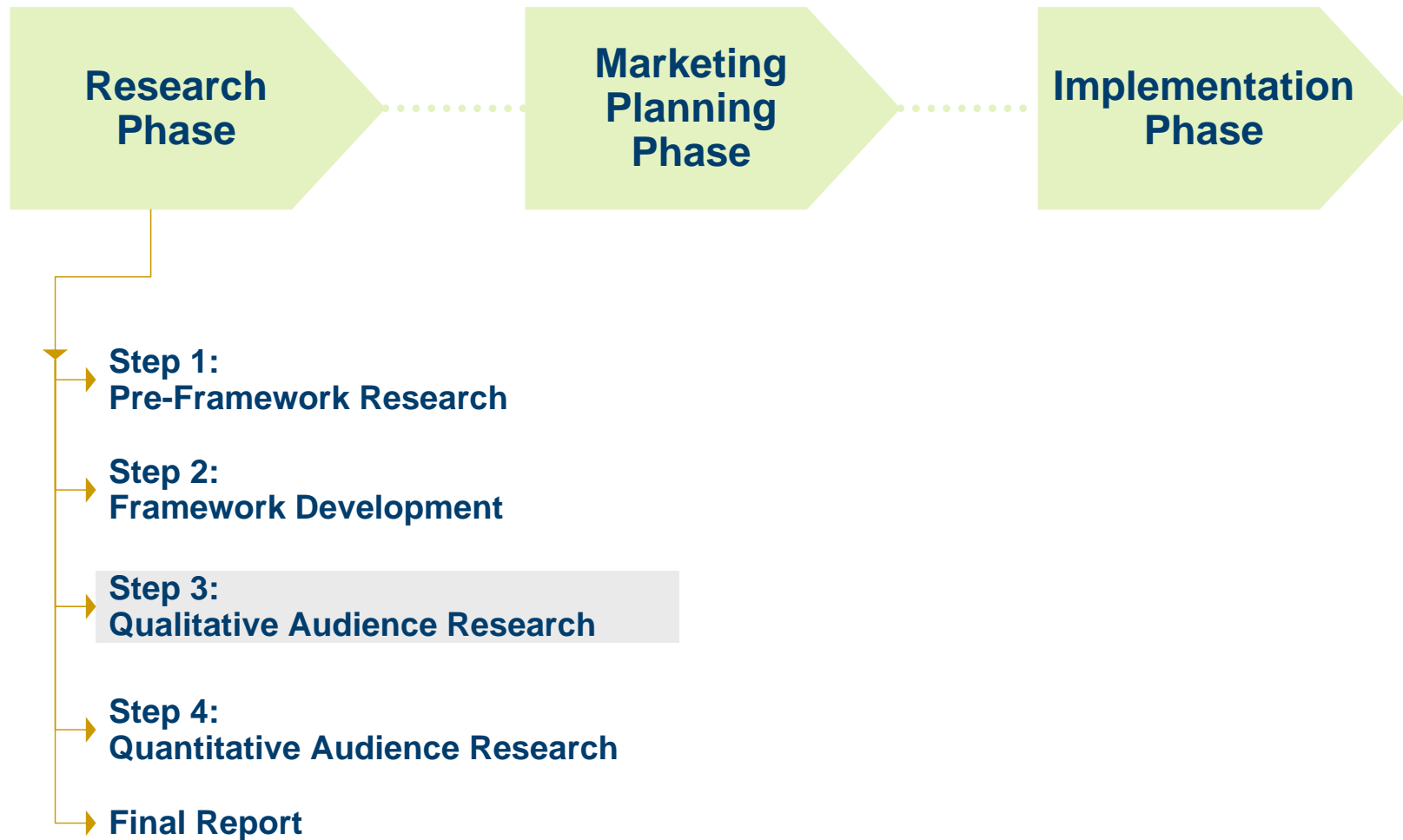
Methodology

Previous research

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# Audience Development Project Overview

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## Objectives of the qualitative phase

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- To gain insight into how the dance community can attract new audiences and increase the attendance of its current patrons
- To uncover key perceptions, benefits, barriers, expectations, and motivations with regard to dance attendance
- To explore hypotheses developed in the first two research phases about why people do or do not attend dance and how they make those decisions
- To reveal any similarities or differences that patrons perceive between various dance forms
- To understand how dance patrons decide which cultural activities to attend
- To test concepts for increasing awareness of, interest in, and attendance to dance in Chicago

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# Qualitative research methodology

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- Combination of focus groups and in-depth interviews
  - ▶ All participants were Medium or Heavy arts users (attended 10+ arts events in last year)
  - ▶ 5 Focus Groups
    - “Light,” “Medium” and “Heavy” dance attendees, “Small/Experimental Company” attendees
    - Mix of ethnic/cultural background in each group (European-American, African-American, Latino, Asian-American, European)
  - ▶ 11 In-Depth Interviews
    - African-American, Hispanic and Caucasian “Medium” and “Heavy” dance attendees
- Held between October 8 and November 13, 2003 in downtown Chicago
- Participants recruited from patron lists provided by 11 dance companies and presenting organizations
- Purpose of qualitative research: to identify and describe issues
  - ▶ Not able to quantify, size, etc.
  - ▶ Some descriptions are sufficient for action planning; some become hypotheses or questions for further study

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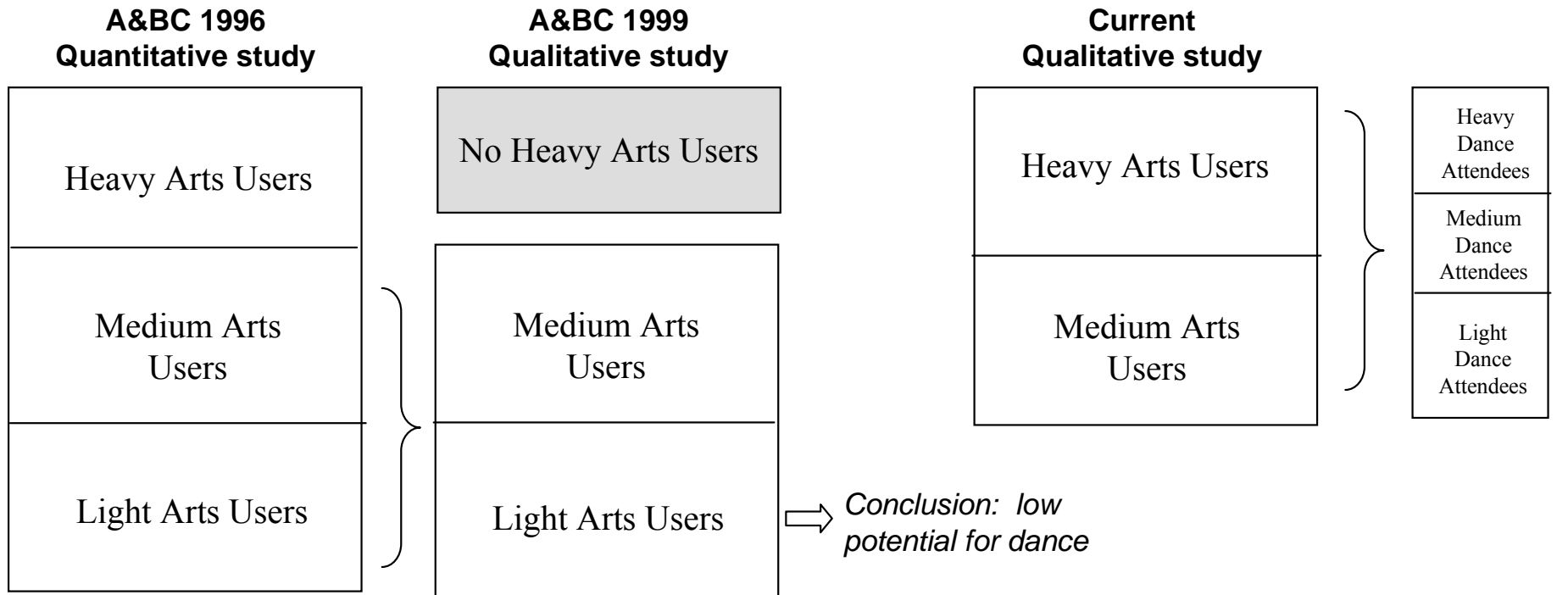
# Previous research served as a foundation

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- Step 1: Secondary Literature Review
  - ▶ “Dance” is one of the most unfamiliar art forms, holds a multitude of meanings, is highly symbolic in a verbal culture
  - ▶ Dance attendees more likely to be at least medium users of cultural arts (cross-over potential)
    - Light arts users unlikely to become dance attendees
  - ▶ Motivations:
    - Emotional stimulation
    - Intellectual stimulation
    - Escape
  - ▶ Barriers:
    - Fear of content/style, lack of familiarity with the art form, the worry of not “getting it”
    - Lack of information
    - Young children at home
    - Lower levels of disposable income
  - ▶ Ethnic differences (African American and Latino) compared to the broader population:
    - Motivated to attend performances with direct connection to own cultural background
    - More verbal communication about dance
    - Greater integration of dance into overall culture

# Previous research served as a foundation (cont.)

- In structuring this phase of the research, we expanded on two recent Arts and Business Council studies:
  - ▶ “Expanding the Market for the Arts in Metro Chicago,” 1996 (quantitative survey)
  - ▶ “Barriers and Motivations to Increased Arts Usage Among Medium and Light [Arts] Users”, March 1999 (qualitative triads)



*Many similarities between heavy and medium arts users; Light arts users very different from other segments*

*Many similarities between heavy, medium and light dance attendees*

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## Previous research served as a foundation (cont.)

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- Step 2: Dance Leader Interviews:
  - ▶ Audiences connect with dance in three ways: physically-kinesthetic, emotionally, intellectually
  - ▶ Dance leaders had difficulty articulating the benefits of attending dance
  - ▶ Barriers to attending: practical, background, and psychological issues
  - ▶ Consumers need easier points of entry: accessible, engaging programming and bridges for new or infrequent audience members
  - ▶ Dance leaders hold mixed views of the Chicago dance community
    - Lots of positive developments over the last decade
    - Shared feeling that dance has been underserved and under-capitalized
    - Concern about the cohesiveness of the dance community
  - ▶ Chicago has its share of “mediocre” dance, brought about by insufficient training and professional development for choreographers
  - ▶ Dance’s repertoire is not a canon, creating a lack of common language and greater demand for good works than the supply
  - ▶ Chicago would benefit by hosting more national and international companies
    - Expand the knowledge of the Chicago dance community as well as engage new patrons
  - ▶ The dance community needs a strong association and possibly joint marketing efforts

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## Dance attendees – who are they?

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Findings

Implications

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# Who Are They?: Understanding the Variety in Dance Audiences

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- Respondents showed a very wide variety of personalities, interests, preferences and demographics, regardless of the frequency of attendance
  - ▶ Differences *within* groups (“Light,” “Medium” or “Heavy” users) were greater than differences *between* groups
    - probably due to the variety of dance forms that one can see performed in the Chicago area
  - ▶ Wide variation in age, income and residency; most were college educated
- Because dance is so varied and works on many symbolic levels, a wide variety of people can find something meaningful in it and enjoy attending
  - ▶ Dance may not have as large an audience as some other art forms have, but within its range of appeal it reaches a diverse array of individuals
- The “Medium” and “Heavy” users were very difficult to distinguish from one another in terms of attitudes or motivations
  - ▶ Most of the research was with these patrons, so findings in this report primarily refer to them

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# Who Are They?: Understanding the Variety in Dance Audiences (cont.)

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- The “Light” users seemed easier to distinguish from the other groups
  - ▶ Didn’t know as much about dance
  - ▶ Had broader definitions of which events constituted “dance performance”
  - ▶ Were more sensitive to practical barriers (due to lower desire to attend)
  - ▶ Other possible characteristics to explore in the quantitative phase:
    - More traditional in their tastes?
    - More likely to seek out the large companies or shows?
    - More likely to pull back on attendance if they see something they don’t like?
    - More focused on “entertainment” than “art”?
  
- The “Small/Experimental Company” users ranged from light to heavy attenders
  - ▶ They differed from more mainstream patrons
    - More independence of opinion and thought
    - A more youthful/exploration mindset
  - ▶ But there were many differences within this group, including age and reason for attendance

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# Who Are They?: Understanding the Variety in Dance Audiences (cont.)

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- Within all groups, differences were pronounced
  - ▶ Some people liked new works, some liked established works, some both
  - ▶ Some people noticed differences between the dance forms and struggled to describe how dance forms are similar; others saw broad similarities easily
  - ▶ Some people seek only emotional experiences in dance attendance, some seek both emotional and intellectual (but emotional is more important)
    - No respondent endorsed intellectual experience *over*, or to the exclusion of, emotional experience
    - Kinesthetic *experience* did not emerge as something people were seeking from watching dance (for some it can evoke kinesthetic *memories* of having danced themselves)
  - ▶ Some people reported changes in their attendance tastes over time, while others did not
  - ▶ Some people enjoyed noticing details while others focused on general impressions
  - ▶ Some people started attending dance as children with their families, others as adults on their own

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# Implications:

## Understanding the Variety in Dance Audiences

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- Frequency of attending dance performances does not provide enough information for segmentation or general marketing planning
  - ▶ Other factors beside frequency appear to be more influential on a person's choice and amount of dance attendance
  
- Dance patrons appear to be a diverse group – perhaps more so than patrons of other art forms
  - ▶ Research participants were of all age and income ranges, though nearly all had a college degree
  - ▶ Reaching this wide band of consumers will require a multi-tiered marketing approach
  
- Ongoing data collection on audiences is critical for every dance company
  - ▶ An analytical as well as a financial challenge – especially for smaller or newer companies
  - ▶ Provides an opportunity for the dance community to collaborate
    - A dance community organization could handle the ongoing data collection, analysis and marketing recommendations to all companies

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# Implications:

## Understanding the Variety in Dance Audiences (cont.)

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- Factors identified and discussed in these focus groups and interviews may be useful in future segmentation work:
  - ▶ Types of dance forms enjoyed
  - ▶ Enjoying a number of different forms or few
  - ▶ Entry point: childhood, adolescence or adulthood; non-family influencers
  - ▶ Enjoying emotion or logic or both in entertainment or the arts
  - ▶ Attitudes about live performance
  - ▶ Previous and/or current experience with dance as a participant
  - ▶ Focus on visual arts and kinesthetic experiences
  - ▶ Outcome focus or process focus
  - ▶ Being an initiator or a follower when seeking arts or entertainment events
  - ▶ Life-stage (in terms of personality development)
- The quantitative research will help us understand which of these variables are most important

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## How they got started

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Findings

Implications

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# How they got started

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- The first exposure many people had was in childhood
  - ▶ Being taken to dance performances by family, especially mother
    - The Nutcracker and other classical ballet was mentioned often for Chicago-bred respondents
  - ▶ Many (female respondents) had dance lessons/classes in childhood
- A critical juncture: when and how they began attending dance performances on their own
  - ▶ Early exposure may have provided positive memories and early “rehearsal” for arts attendance, but it seems to take something else (e.g. later dance training or attendance in college or adulthood) to set an ongoing pattern
- In the absence of early, family-led attendance, respondents described three pathways:
  - ▶ School: high school or college can help develop interest in the arts, including dance
    - Dance classes, field trips to performances, participating in school performances or plays
  - ▶ Significant others or social reference groups can lead
    - Someone other than a family member, e.g., friend, colleague, girlfriend or boyfriend
    - Someone who is a dancer or other “insider”
  - ▶ Focus on a dance celebrity can turn into attending performances
    - Mikhail Baryshnikov, Gregory Hines, Alvin Ailey, Gene Kelly, Fred Astaire

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# Implications:

## How they got started

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- Those with early dance experience might be easier to engage for later dance attendance
  - ▶ Underscores the importance of supporting dance schools for children
  - ▶ Also suggests emphasizing family programming, child-friendly marketing, mother-daughter social events, classes, etc.
  - ▶ But it will take quantitative research to clarify whether early experience is truly predictive (do many who dance as children early *fail* to become attenders?)
  
- A quantitative study of arts attendance in Cleveland\* showed the importance of peer group influences and childhood arts education on current attendance
  - ▶ Childhood arts instruction/education and having adult friends who attend the arts had a greater effect on later attendance than did mere exposure/attendance as a child
  - ▶ If the same pattern holds for dance in Chicago, it would suggest promoting dance through adult “reference groups” (group sales, business groups, gift certificates, etc.) and offering adult dance classes

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\*Cleveland Foundation, 1985

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## What about the men?

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Findings

Implications

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# What About the Men?

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- Reflecting the typical dance audience, our respondents included more women than men
  - ▶ Many used the word “dragged” to describe taking men to dance performances
- Asked to think about why more men do not attend, people (of both genders) spoke of several issues:
  - ▶ Men are not typically exposed to early dance training
  - ▶ Dance is perceived as feminine, athletics as masculine (in the United States)
    - Some homophobia still exists
  - ▶ A fear of exposing themselves emotionally
  - ▶ Dance doesn’t have a goal-oriented outcome (no “final score”)
  - ▶ Men are linear thinkers, lack interest in an abstract, non-linear art form
- Note:
  - ▶ A homosexual audience was not specifically targeted in this research, although some groups did have gay and lesbian participants
  - ▶ In the quantitative phase we will learn more about how gay men’s opinions and experiences differ from those of heterosexual men

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## What About the Men? (cont.)

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- So how did our male respondents come to be dance attenders?
  - ▶ For most, someone introduced them to dance performance, usually a spouse/partner
  - ▶ A few had some experience with dance attendance in college
  - ▶ A few were brought in through a related art (musical theater, music, photography)
  - ▶ Men's comfort level with dance appears to differ based on ethnicity or country of origin, with European men showing a greater acceptance of dance than average
- These men are comfortable not being typical in regard to their dance interest
  - ▶ *"I spent 18 years in the Marine Corps. I got shot twice in Vietnam ... I was a homicide detective for 9 years with the Chicago Police Department ... My badge actually stopped a bullet one day. So I don't think I have to get anybody's permission to do a damn thing I want to do..." (Latino male in his 50s; started attending dance in his 30s, has attended ballet, contemporary and Latin ethnic and modern performances)*
- Respondents not raised in the U.S. noted that men's lack of comfort with dance appears to be an American issue

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# Implications:

## What About the Men?

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- The men in this study stated or implied that attending dance performance requires independence from stereotypical “male” behavior, at least as defined in the US
  - ▶ Marketing message could be “two-sided”: both acknowledge the stereotype and license men to overcome it
  - ▶ Could also focus on another positive characteristic identified as masculine: the independent-thinking, self-directed individualist
- Some dance forms may be better entry points for men
  - ▶ e.g. jazz or modern over ballet?
  - ▶ Quantitative research needed to confirm this
- For now, women are the primary decision-makers, so marketing might target them
  - ▶ Provide women the tools to engage the men in their lives
    - Help connect dance to other art forms (e.g. partnerships with theater or visual arts)
    - Provide opportunities for intellectual stimulation (e.g. make it feel more “outcome” oriented)

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# Ethnic and cultural differences

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Findings

Implications

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# Ethnic and Cultural Differences

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- Latino and African American respondents were not significantly different than others in terms of what they derive from attending dance
  - ▶ also found in A&BC study
- Some special loyalty to culture-related performances was described by both the African American and Latino respondents
  - ▶ For some people, attendance is a “should” as well as a free choice for enjoyment (“we should support them”)
- As noted in other studies, there is a different meaning or place for dance in both the Latino and African American cultures than in the broader population
  - ▶ Dance is more a part of everyday life, community experience, and celebration
- Respondents raised outside the U.S. (especially men) seemed to have more open attitudes about dance than American-born respondents
- Many respondents (of all ethnicities) said they enjoyed seeing “dance from different cultures”
  - ▶ Part of the wish to explore, learn about the world, be broad-minded

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## Ethnic and Cultural Differences (cont.)

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- But “culture” is a slippery concept:
  - ▶ Some dance is obviously tied to a specific culture, but other dance is cross-cultural or fuses different cultural elements
  - ▶ Even “my own culture” was often varied (cross of various nationalities, of nationality and religion, etc.)

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# Implications:

## Ethnic and Cultural Differences

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- The quantitative phase should continue to explore the roles played by dance in different cultures and by cultural differences in dance attendance
- Dance marketers should guard against overstating cultural differences: it is easy to miss the great variety within ethnic groups that occur here
  - ▶ True for both African-Americans and Hispanics
- It's important not to offend members of minority communities by treating them as if "they" are all alike
  - ▶ One African-American respondent wanted to participate in a mixed focus group or be interviewed individually, because she felt she did not fit the prevailing stereotypes about the "Black experience" and did not want to support the perception that all Blacks think alike
  - ▶ Ethnic audiences want to see themselves as a natural part of the expected audience
- Other demographic factors likely outweigh ethnicity in their affects on dance attendance
  - ▶ Can be explored in the quantitative study

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# Benefits and values

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Findings

Benefits ladder

Implications

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# What They Say They Get Out of Dance

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- Emotional release, new state, uplift of mood
- Spiritual uplift, connection
- Change of mindset through exposure to different “language”, symbols
- Access to primal, non-verbal experience, sensuality
- Community with others (specific people and humanity at large)
  - ▶ Connection with artists or connection with the people they attend the performance with
- Vicarious thrill, “wannabe” fantasy
- Reminder of human potential, best of humanity
- Reminder or reliving of happy memories
- Multi-sensory stimulation (visual, aural)
- Fun and entertainment
- Surprise, exploration of something new
- Happy feelings (joy, excitement)
- Connection with beauty & creativity
- Personal development/increased awareness of the world around them
- Positive (cultured, worldly, sophisticated, adventurous, independent) self-image
- Inspiration for themselves in their own work or lives
  - ▶ “We can relate our own creativity to dance, whether it be our love for music, a painting or the way we cook, the way we arrange things on a plate, the timing of it.” (Female, 46, Latina, “Heavy User”)
- Exploration or exercise of new aspects of self
  - ▶ e.g., if professional life is highly analytical, a chance to let the emotional/aesthetic self emerge

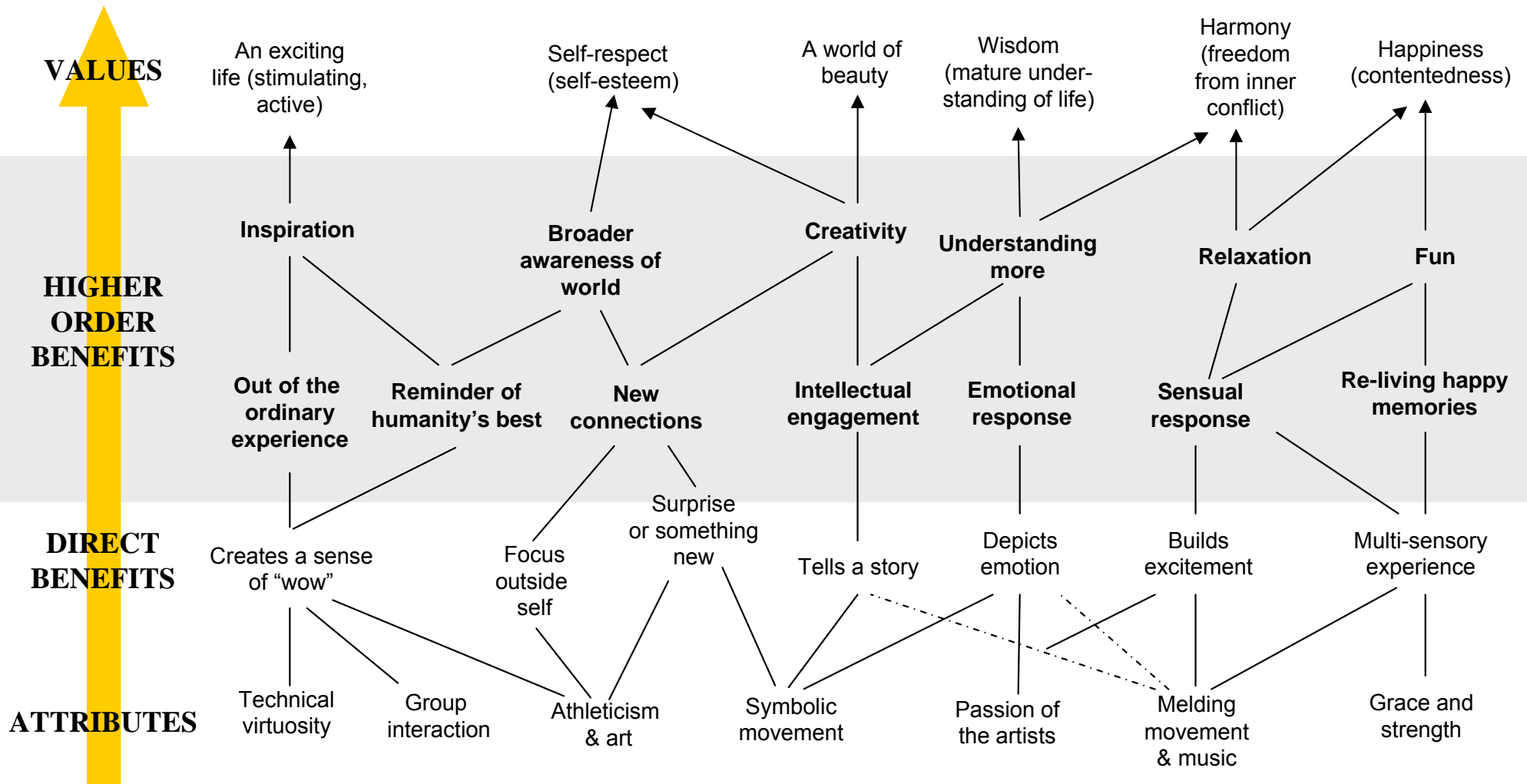
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## What They Say They Get Out of Dance (cont.)

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- Benefits do not appear to differ significantly between Light, Medium and Heavy dance attendees
  - ▶ Will be explored more in the quantitative research

# A Benefits Ladder for Attending Dance



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# Implications: Benefits

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- This rich list of benefits can be a matrix from which individual dance companies can develop their market positioning
  - ▶ With the variety in dance audiences (and target audiences) and the variety the “product,” it would be difficult to select a single positioning for dance as a whole
- Positioning should be drawn from the *higher order benefits* level
  - ▶ more personally relevant and emotionally interesting than attributes
  - ▶ more concrete and unique than values
- Understanding how benefits differ for different demographic or personality segments will help dance companies identify their target audiences
- Each dance company would select its top 3–4 benefits and craft a unique positioning around those
  - ▶ e.g., if a company focuses on innovative works, its positioning might emphasize new connections and perspectives on the world for a younger, exploratory-minded target
  - ▶ Secondly, it should develop its positioning in terms of other performing arts, culture generally, entertainment, etc.

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## Barriers to attending dance

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# Barriers to Attending Dance

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- Many barriers identified in the Dance Leader interviews were confirmed here, but a few were described differently
- Practical barriers
  - ▶ Confusion over different types of dance: confirmed
    - Discussion of video clips revealed a lack of a common language for certain forms, especially modern, contemporary and even jazz
    - Of the 9 clips shown, ballet, tap, Irish and African were labeled most consistently
    - People know what they like when they see it, but may not know how to interpret messages using the standard form terms
  - ▶ Lack of awareness and name recognition of Chicago dance companies and artists: confirmed
    - Except among dance aficionados (and even they cited lack of advertising as an issue)
  - ▶ Lack of easy access to practical information: confirmed
    - But for many not the main issue
  - ▶ High pricing of some companies/ performances: confirmed
    - A definite barrier, especially for those on more limited or fixed incomes
    - Also a factor in expectations about performance quality
  - ▶ Parking cost and “hassle” factor: confirmed for both suburban and city residents
    - High on the list of barriers

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# Barriers to Attending Dance (cont.)

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- Psychological Barriers

- ▶ Intimidation factors (fear of not “getting it” or needing to learn something to understand ‘what they’re doing up there’): confirmed to a degree
  - Especially in the conversation about men
  - But “intimidation” or “fear” are probably too strong
  - “Getting it” may not be any more complicated than having an opportunity to understand the idea behind the staging, the movements, the story if one is intended, or to know that a story is *not* intended
- ▶ Abstract nature of dance: mixed
  - Degrees of abstraction depends on the dance form itself and the works being performed
  - Some people prefer the less abstract forms or found it easier to start there.
  - But abstract expression was also deemed to be one of the benefits of dance
  - “The TV generation” being more comfortable with concrete description was not confirmed
- ▶ Discomfort with body expression, except in sports: confirmed for men
  - Discussed as U.S.-wide rather than just Midwestern barrier
- ▶ Lack of a peer group interested in dance (new barrier uncovered): mixed
  - While some aficionados are willing to attend dance performances alone, many people mentioned the importance of being able to share the experience with others

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## Barriers to Attending Dance (cont.)

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- Background Barriers
  - ▶ Lack of familiarity with art form because of deficit in dance education: confirmed somewhat
    - But only indirectly, through the histories respondents shared about getting to know about dance as a young adult or older
  - ▶ Not growing up seeing great dance in Chicago: not confirmed
    - Visiting dance companies were available to these respondents

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# Implications:

## Barriers to Attending Dance

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- Practical barriers
  - ▶ Image:
    - Strong need for awareness-building efforts about dance
  - ▶ Logistics:
    - Easier access to information about performances
    - Provide all the practical details – directions, parking, etc.
    - Parking discounts
- Psychological Barriers
  - ▶ Use visuals, not words, to communicate the type of dance performed
  - ▶ Emphasize psychological benefits that could outweigh/defuse the barriers (e.g., emotional exhilaration, connection to community, independence and self-esteem)
- Background Barriers
  - ▶ Build bridges to the art form for those who were not given the exposure/training young
    - Providing more information about individual dance works, their context, etc.
    - Lecture-demonstrations in collaboration with other educational organizations for adults
    - Offering classes or adult education opportunities
    - Social opportunities for lighter users

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# Crossover

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Individual development

Dynamics

Implications

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# Crossover and Individual Development

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- Crossover types under discussion include:
  - ▶ From another art form to dance
  - ▶ From one form of dance to another
  - ▶ From one company to another within the same form
- Dance non-attenders were not included in this research, so exploring how people might move from another art form to dance was done chiefly by asking about attenders' histories
  - ▶ Interest in visual arts and live performance (music, theater and musical theater) do seem to be natural bridges to dance
  - ▶ Further testing of that form of crossover can occur in the quantitative phase
- Some light users appear to be good prospects for crossover from one dance form to another
  - ▶ Most important factor is a desire to seek new things or to seek variety
  - ▶ But this desire was not found uniformly with these respondents

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# Crossover Dynamics

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- Some of the medium and heavy users described crossover due to change in their tastes
  - ▶ E.g. from the “structure” of ballet to the “freedom” of modern dance
  - ▶ Or starting with ballet and becoming more interested in different ballet companies over time.
  - ▶ Or starting with musical theater and later adding jazz, Latin and contemporary dance
- A common assumption is that older arts patrons are more tradition-bound, but some of these older respondents were anything but
  - ▶ Had broadened their dance attendance over time and wanted to take certain risks
- Within dance, there appear to be three common patterns of crossover:
  - ▶ **Deepening:** starting with a form and expanding within that form (going in-depth)
  - ▶ **Broadening:** starting with a form and broadening to include other forms as well
  - ▶ **Switching:** Starting with a form, switching to another, going in depth with that

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# Implications: Crossover

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- The complexity of individual differences crossed with the many things that “dance performance” can mean makes it hard to generalize about why people attend what they do
  - ▶ Capturing and conveying the variety of opportunities to *find oneself in the world of dance* will be the key challenge of any joint marketing endeavor
- One hypothesis for further study is that personality types and life-stage are better predictors of crossover behavior than age or past arts attendance experience
  - ▶ E.g., adolescents or young adults still forming identities may be open to trying new things, as would older adults seeking to synthesize meaning and expand their horizons with newfound time
- Individual dance companies can craft communication strategies based on the match between what they offer and what life-stage tasks their target audiences are facing:
  - ▶ Exploration and self-discovery (Late adolescence to young adult)
  - ▶ The romantic and sensual (Young adult-middle adult)
  - ▶ Inspiration and creativity (Middle adult)
  - ▶ Meaning and spirituality (Older adult)

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# Implications: Crossover (cont.)

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- Other studies have demonstrated that collaborations across art disciplines and within a discipline can increase audiences as well as save money
  - ▶ Might suggest cross-marketing at one another's dance events to increase form-to-form or company-to-company crossover
  
- Strategies for creating crossover within dance will center on encouraging trial
  - ▶ Special offers to dance attenders from another company
  - ▶ Performing at community events
  - ▶ Collaborating with other companies for a "Day of Dance"
  - ▶ Note: Prior dance attendance may make the leap a little easier, but it's still a leap

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# Decision making

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Process

Venue

Resources and information tools

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## Process: How Do They Decide?

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- Again, individual differences led to a wide range of answers
- Some people prefer advance planning, some prefer spur of the moment, some will do both at different times
  - ▶ Advance planners are easier for the dance companies to reach with brochures and mailings (the tactics they're using now)
  - ▶ Spur of the moment buyers are more difficult to reach because of the short runs of dance engagements
    - They have to be pretty vigilant or hooked in to the dance community to catch the advertising or hear the "buzz"
- Even those who prefer spur of the moment planning will buy in advance for events that are important to them and/or that are likely to sell out
  - ▶ Helps ensure getting tickets to a "must see" company or work
  - ▶ More common among devoted dance attenders

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## Process: How Do They Decide? (cont.)

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- There seem to be two key decision thought patterns:
  1. “Here’s what’s coming up this dance season. What do I/we want to see?”
    - Advance planning: sets time and money aside for dance and ensures its place in the leisure-time mix
    - Tends to depend on brochures that offer full season programming info
  2. “I/we have an open date and would like to go out. What should I/we do?”
    - Spur of the moment (or at least closer-in) decision: makes dance compete with many different possibilities)
- To make the second pattern yield a dance purchase requires cutting through the clutter
  - ▶ But currently, dance is not on enough people’s “short list” of things to do on any given weekend
  - ▶ Advertising dance events is not widespread or consistent enough to help dance get onto those “short lists” regularly

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# The Role of Venue

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- Respondents did not describe a venue in Chicago that serves as a guarantee of dance quality, such as a Carnegie Hall does for classical music in New York
  - ▶ Note: research took place before the Harris Center for Music and Dance opened, so little was mentioned about that facility
- Some venues are preferred over others for things like sightlines, intimacy, location, comfort of the space, degree of formality/informality, and parking convenience
  - ▶ Concerns for some of the bigger venues are cost (including parking cost) and getting seats with a good view (not too far away)
  - ▶ Concerns for some of the smaller venues are comfort, physical access, and safety
- If potential attenders are less motivated, the venue can keep them away; if they're more motivated, venue problems won't deter attendance
- Venues are perceived to convey the degree to which a company is "established" or not, so they have an impact on quality expectations
  - ▶ The more elegant the venue and the more expensive the ticket, the more the patron expects the performance to be "close to perfect"

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# Resources, Information Tools

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- Word of Mouth
  - ▶ The most effective resource
    - Can take effect before a run is over or in advance of an event
    - Has a shelf life: “My friend or family member loved seeing them. I’ll have to make sure I see them next time.”
  - ▶ Some respondents were obviously “Connectors” or “Mavens” for dance\*
    - Encouraging people to attend, or being the person others consulted for advice about what to see
  - ▶ It can be socially risky to encourage others to attend dance
    - They might not like what you recommend
    - It can spoil your own experience or adversely affect the future of attending dance performances with that person, too

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\*Malcom Gladwell, *The Tipping Point*, 2000.

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## Resources, Information Tools (cont.)

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- Newspapers
  - ▶ The *Tribune* and the *Reader* were mentioned most often
    - The *New York Times* for general dance reviews was also mentioned by a few respondents
  - ▶ Advertising and reviews were seen as decision-making tools
    - Advertising (like brochures) was expected to provide enough visuals *and* practical information to let people make a decision
      - But most respondents recognize that there is limited dance advertising
    - Reviews are read more for information about the works or style of dance a company offers
      - Less meaningful as an opinion guide for immediate purchase decisions
      - But might be “stored” for later decision making

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## Resources, Information Tools (cont.)

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- Brochures, Mailings
  - ▶ Given consumers' typical response to promotional mail, the response to mailed dance brochures was notably positive
    - Dance attenders look at them, use them and appreciate the visuals
    - Many keep the brochures they receive for the season or dispose of them only after they've made their plans and purchases
  - ▶ Often cited as the most useful form of information about programs, dates, and venues
  - ▶ A few caveats, though:
    - A few felt information is less reliable when it comes in highly polished forms ("program descriptions written by marketers")
    - Some said they preferred postcard mailings (less costly/wasteful, more likely to be from smaller or newer companies)
- The Internet
  - ▶ People reported using individual dance companies' Web sites and Metromix
  - ▶ Most were not aware of a Web site for Chicago dance

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# Implications:

## Decision making

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- Visuals are a must for communicating what's really being offered (product/experience)
  - ▶ Much better than language at helping an individual decide whether this dance (form, company, program) is appealing or not
- Dance companies should provide enough information so that the Connectors and Mavens can know which friends to tell and help them connect with it
  - ▶ Programs, artists, practical info, etc.
  - ▶ Quotes from choreographers or artists
- The Internet appears to offer great communication opportunities for dance
  - ▶ Can be useful for both advance planners and spur-of-the moment planners
  - ▶ Streaming video and graphics can convey key visual information
  - ▶ Outbound email (on a sign-up basis) can improve awareness and drive sales
  - ▶ Web site(s) can help familiarize new audiences with dance form(s) or compan(ies) through images, background info, meet-the-choreographer pages, links to further information, etc.
  - ▶ The challenge will be how to drive people to the Web site or sites
    - Could be the call-to-action of a collaborative Chicago dance campaign

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## Concepts designed to build engagement

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Tactical concepts evaluated

Category campaign

Implications

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# Concepts Designed to Build Engagement

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- 8 tactical concepts tested
  - ▶ A social event before the performance
  - ▶ A 'dance sampler' evening
  - ▶ Work in progress
  - ▶ A city-wide dance Web site
  - ▶ Background information
  - ▶ Collaboration with other art forms
  - ▶ Venue as part of the experience
  - ▶ Dance Pass
  
- Some had widespread interest, others appealed just to certain segments
  - ▶ The key is matching the right concept with the right audience
    - Will be part of the quantitative research

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# Concepts Designed to Build Engagement

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- “A social event before the performance”
  - ▶ General reactions were neutral to slightly positive
    - Positive
      - Meeting the artists
      - Learning more about the evening’s programming
    - Negative
      - Supplanting other plans (e.g., pre-performance dinner)
      - Socializing usually limited to one’s own group
      - Reluctance to mix with strangers
  
- “A ‘dance sampler’ evening, where you would see performances by five or six dance companies, performing different types of dance, all in one venue”
  - ▶ Seen in a generally positive light, and familiar to many respondents through Dance Chicago and Dance for Life
    - Positive
      - Variety
      - Seeing something new, which one might or might not want to see more of in the future
    - Negative
      - People with defined preferences said they would prefer to select the works or companies on their own rather than see someone else’s choices

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## Concepts Designed to Build Engagement (cont.)

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- “An opportunity to see a work in progress, hear the choreographer speak about the work, and give feedback to the artists”
  - ▶ Mixed reactions emerged about this idea
    - Positive
      - Dance aficionados were interested in hearing the choreographer speak about the work
    - Negative
      - Some only want to see finished works (seeing a rough version might diminish the experience)
      - Little or no interest in providing feedback or hearing others do so
  
- “A city-wide dance Web site featuring profiles of dance companies, dancers, choreographers, programming schedules, and events”
  - ▶ The strongest positive response, even among the few respondents who don’t use the Internet themselves
    - Positive
      - Easy access
      - All in one place
    - Enhancement ideas
      - Streaming video
      - Buy tickets online too
      - Links to other dance sites

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## Concepts Designed to Build Engagement (cont.)

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- “Background information on the dances performed, provided to you before the performance”
  - ▶ Another very strong idea, across the wide variety of respondents
    - Positive
      - Enhances the appreciation of the experience for many
      - Provides more intellectual stimulation, if desired
    - Enhancement ideas
      - Want information about the choreographer, context, ideas or intentions about the piece
      - Provide in newsletters and on Web sites as well as in program books
      - Most of them liked information in advance but some preferred to experience the piece and then review the information
  
- “Programs with one of your favorite arts organizations that would also include dance” [or] “A performance that combined dance with another type of art form (for example, theater, live music, or visual arts)”
  - ▶ Generally received positively, with reference to the kinds of collaborations that some organizations are beginning to try or have tried in the past
  - ▶ This idea was slightly less interesting to “Light Users” than to others

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## Concepts Designed to Build Engagement (cont.)

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- “A performance where the venue itself is part of the experience, from the moment you step through the door”
  - ▶ Also received a mixed responses
    - Positive
      - Feel transported to another time or place
      - Enhance the overall experience
    - Negative
      - Would lose its specialness if done all the time
      - Adds to production costs unnecessarily
      - Not appropriate for all programming – more like a “gimmick”
  - ▶ “Light Users” appear to favor this idea more than other dance patrons
    - These respondents may attend more high-budget shows and perhaps had Blue Man Group or Cirque du Soleil in mind here

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## Concepts Designed to Build Engagement (cont.)

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- “Dance Pass: one pass that would allow you to attend performances of different dance companies during a specified timeframe”
  - ▶ Generally received more positively than negatively, but reactions were heavily influenced by the length of time the pass would be valid and which companies would be included
    - Positive
      - Presumed cost savings
      - Access to a range of companies
      - Variety of experiences afforded
    - Negative
      - Having to remember to use the pass within the timeframe
      - Risk of not having enough of the companies the respondent would like
    - Enhancement ideas:
      - Use a word other than “pass” because it has the connotation of being free

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## Category campaign (e.g. “Got Milk?”)

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- Respondents understood this kind of advertising and were open to it for dance
  - ▶ They want more people to know about dance, especially new audiences
  - ▶ They want greater access to information on performances
  - ▶ They feel that dance companies should support one another
- However, they had difficulty applying the idea to the Chicago dance community
  - ▶ How to convey everything that someone can experience with dance performance?
  - ▶ Cited lack of advertising in the past, so a category campaign would be an improvement
    - Might help companies that can't afford their own advertising
  - ▶ No clear preference between a category campaign and additional communications from individual companies
- Related concept: having a Dance Directory in the newspaper similar to the Theater Directory
  - ▶ Advance planners said the information might not appear soon enough for planning
  - ▶ Others felt it was a good idea to build awareness, but not as strong as the Web site idea

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# Implications:

## Concepts Designed to Build Engagement

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- The strongest ideas
  - ▶ City-wide dance Web site
    - Provide a variety and depth of information and link to many specific dance company Web sites
  - ▶ More background information
    - Written, electronic, pre-performance talks, newsletter, etc.
  - ▶ Dance Sampler
    - Either as described or other events that provide introduction to different companies
- Good ideas that need further definition
  - ▶ Programs with other arts organizations
    - Has strong benefits, but each dance company will need to identify the partners that most make sense
  - ▶ Dance Pass
    - Good potential for collaborations and a way to create trial and crossover, but specific parameters need further testing
  - ▶ Transforming the venue
    - Good as something to enhance experience on an occasional basis or linked to specific programming, but requires clarification of strategy

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# Implications:

## Concepts Designed to Build Engagement (cont.)

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- Ideas with narrower interest
  - ▶ See a work in progress
    - Perhaps workable for more experienced attenders or the dance-knowledgeable
    - Could be used with donors, people with very heavy attendance at a given company, or as part of group offers through dance teachers or supporters
    - The feedback component from audience to performers can be excluded
  - ▶ Social event before the performance
    - Probably not for the general public or individuals who do not know one another; perhaps linked to group sales
    - Instead, consider providing information about locations near performing venue for pre- or post-performance socializing or dining, or special offers from nearby locations
      - these may increase benefits for some audiences, but are unlikely to be critical to decisions to attend

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# Implications: Category Campaign

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- Executing a broad image campaign for the category of dance seems difficult given the variety of variables involved:
  - ▶ Types of dance performed
  - ▶ Types of benefits enjoyed
  - ▶ Types of patrons attending
  - ▶ Types of strategies each dance company needs now (e.g. broadening vs. deepening)
- Unlike milk and other category campaigns (diamonds, pork), dance is not clearly defined in the minds of the audience
  - ▶ Not likely to be, nor is it necessarily desirable
- Different dance companies are at different stages in the “product life cycle” (Introduction, Growth, Maturity, Decline/Renewal)
  - ▶ Different stages require different marketing goals and strategies
- More realistic and valuable would be a campaign to create awareness of a new city-wide dance Web site and drive people with a call to action
  - ▶ Could also have an image component (built around higher-order benefits identified above)

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## Key conclusions and recommendations

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# Key conclusions

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1. Current and prospective dance audience members vary widely
  - ▶ Interests, life-stages, personality dimensions
    - Much more than frequency of dance attendance has to be taken into account
  - ▶ Backgrounds in the arts, dance specifically
  - ▶ Decision making process
2. Building dance attendance will require access, access, and more access
  - ▶ Availability of the opportunity to see it
  - ▶ Knowledge about when and where it will be performed
  - ▶ Psychological access to the form and/or program
  - ▶ Physical access to the venue
3. Crossover potential exists to varying degrees, but needs more insight from quantitative research
  - ▶ Between dance companies in the same form: **strong**
  - ▶ Between dance forms: **medium**, but people have to be open to newness and variety
  - ▶ Between dance and other art forms: **not known yet**, will be a focus of the quantitative research

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## Key conclusions (cont.)

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4. Dance audiences are ripe for more marketing
  - ▶ Enjoy the current communications and desire more information
  - ▶ City-wide Web site has great appeal
  - ▶ Use visual language, not verbal, to describe dance form, particularly for modern or contemporary dance companies
5. Dance is primarily an emotional experience, secondarily providing intellectual stimulation
  - ▶ Communication needs to focus on the higher-order benefits to be more personally relevant and emotionally interesting
  - ▶ Different dance companies should focus on different benefits, based on their varying strengths and reputation
6. The dance community should undertake a community-wide communications campaign to launch a city-wide Web site
  - ▶ Should use higher-order benefits as part of messages
  - ▶ However, it should not develop a broad-based image campaign, given the wide variety of audiences, dance types and individual companies

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# Top recommendations

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1. Create a comprehensive Chicago dance Web site
  - ▶ Put significant resources behind a communication campaign
  - ▶ Work with individual dance companies to ensure that every dance communications features the Web site address
2. Continue using brochures/mailings and newspaper with strong visuals and emotional appeals
  - ▶ Consider switching some brochure mailings to more frequent, less expensive mailings
3. Base advertising and communication strategies on higher order benefits that match the product and the personality preferences of the potential audience
  - ▶ This will vary by company and by type of dance
4. Collaborate with other art forms and organizations that can serve as “crossover bridges” to particular types of dance and dance companies
  - ▶ Potential bridges for specific dance forms can be explored in the quantitative research, but might include:
    - Ballet with traditional classical music
    - Experimental dance with experimental theater or music

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## Top recommendations (cont.)

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### 5. Collaborate with other dance companies

- ▶ Strong potential for crossover between different dance forms among certain audience types (to be identified in the quantitative phase)
- ▶ Take advantage of the developmental process for audience members (tastes change and develop over time and with experience)
- ▶ Dance Pass and Dance Sampler are both high-potential tactics

### 6. Provide opinion leaders with the information they need to encourage others to try dance

- ▶ Background information made available through other media ahead of time

### 7. Develop regular audience research for the dance community overall and for individual companies

- ▶ Consider developing these capabilities within the industry association

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## Next Steps

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Quantitative Research

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# Quantitative Research

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- Key objectives:
  - ▶ To better understand what it would take for both dance patrons and non-patrons (who are arts patrons) to increase their dance attendance
    - Delve into specific tactics tested in the qualitative research to determine which types of individuals respond to each idea
  - ▶ To develop a hierarchy of key benefits and barriers for dance patrons and non-patrons
    - Match benefits and barriers to the level of dance type and dance company (where possible)
  - ▶ To identify and profile the key segments to target in patrons and non-patrons
  - ▶ To quantify the findings from the qualitative research findings
    - Develop more specific recommendations for dance companies
- Methodology:
  - ▶ Telephone survey (15 minutes)
  - ▶ 500 responses:
    - 200 dance patrons from a broad dance company/presenter list
    - 300 non-dance patrons from a broad arts consumer list
  - ▶ Timeframe: Winter-Spring 2004

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# Appendices

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How benefits may differ by life-stage

Discussion guide

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# How Benefits May Differ by Life-Stage

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Leisure and play: Using what is known about adult “play” in positionings and communications strategies

- Two basic forms of leisure (“play”) for adults\*
  - ▶ *compensatory* – doing things that meet needs or preferences not met in one’s work
  - ▶ *spillover* – carrying activities and interests from one’s work into play
- Leisure activities/play mean different things at different life-stages
  - ▶ Childhood: learning to trust others and oneself (autonomy) and rehearsing adult activities
  - ▶ Adolescence: developing skills further, exploring identity
  - ▶ Young adulthood: developing intimacy
  - ▶ Middle adulthood: generativity, creativity, self-expression (but less time for play)
  - ▶ Older adulthood: integration of meaning, further emotional & spiritual development, more attention to play than work
- (Note: life-stages depend on individual’s personality development more than on chronological age)

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\*Judith Provost, *Work Play and Type*, 1990.

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## How Benefits May Differ by Life-Stage

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- Out of a list of 6 basic adult needs satisfied by leisure activities or play (Ragheb & Beard, 1980), attending dance performance satisfies 3 especially well:
  - ▶ Psychological needs, e.g., enjoyment, sense of freedom, intellectual challenge
  - ▶ Relaxational needs, e.g., relief from the stress and tension of daily life
  - ▶ Aesthetic needs, e.g., appreciation of and pleasure in beauty and design in arts and nature, sense of deep harmony
- Secondarily, attending dance satisfies:
  - ▶ Educational needs, e.g., making discoveries about the world, gaining self-knowledge and information
  - ▶ Social needs, e.g., relationships with others, family & friends
- Attending dance performances does nothing to satisfy physiological needs, e.g., physical fitness, weight control & other aspects of well-being, although it may serve to inspire people to pay more attention to this type of leisure activity in their lives
  - ▶ And as noted earlier, it does not provide direct kinesthetic stimulation. It may evoke kinesthetic images and memories, but as most people described the professional dance experience, they are sitting in chairs with restricted movement for the most part.