
Chicago Community Trust Excellence in Dance Initiative
Dance Audience Development Project

Dance Audience Survey Findings
FINAL REPORT

September 10, 2004



Audience research and planning for the mission-driven world.

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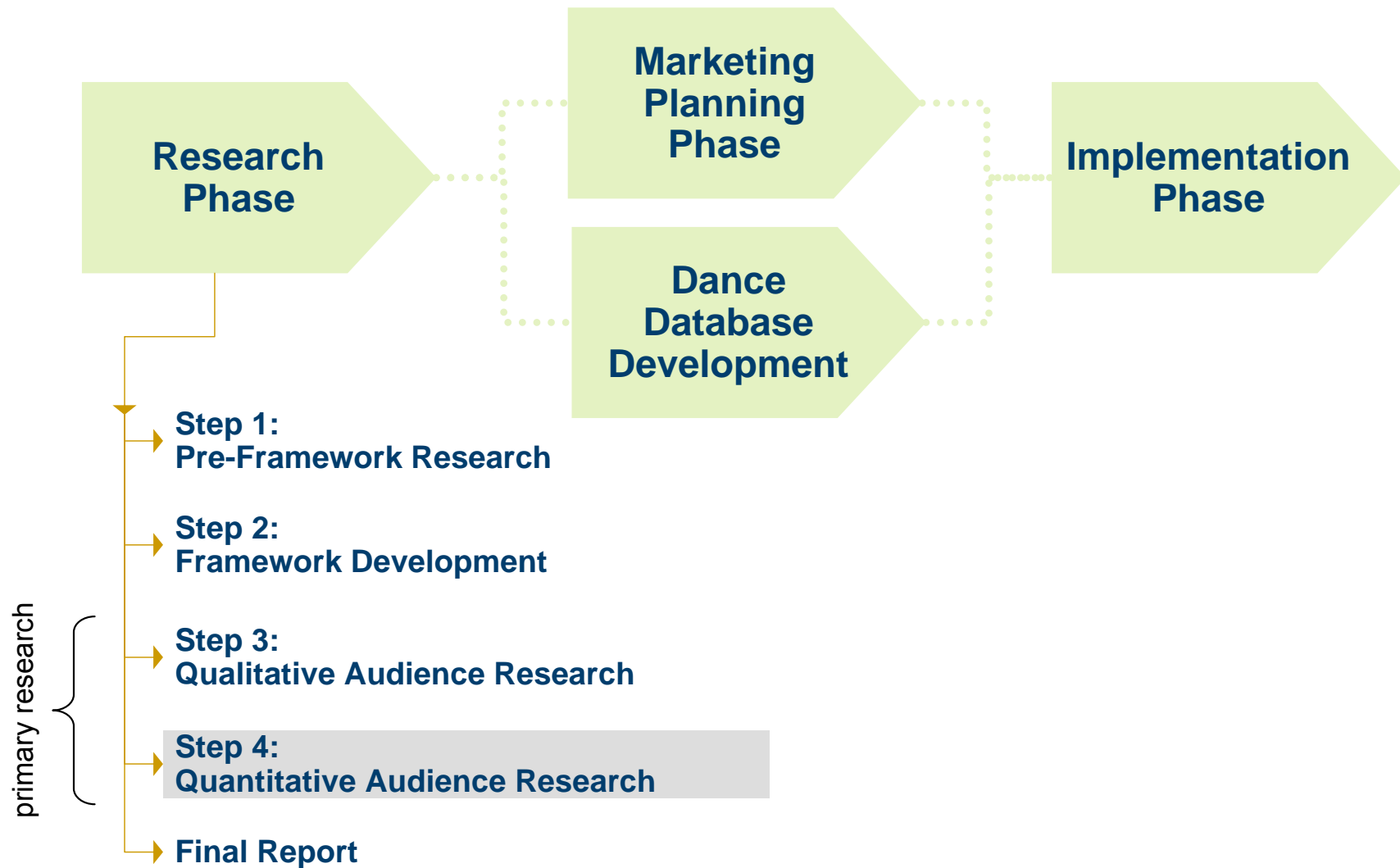
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Objectives & Methodology

- Project plan
- Survey objectives
- Methodology

The research phase of the audience development project is nearly complete



This quantitative research (survey) had four main objectives

1. To understand what it would take to get both dance patrons and non-patrons (who do attend other arts) to increase their dance attendance
2. To identify and profile the main psychographic segments that exist among both dance patrons and non-patrons, and recommend the highest-potential segments for targeting
3. To understand the hierarchy of key benefits and barriers for dance patrons and non-patrons
 - ▶ and, where possible, to match the benefits and barriers to specific types of dance and dance companies
4. To quantify the findings from the focus groups and identify any differences by segment, so that specific recommendations can be made

Survey methodology

- 15-minute telephone survey (see diagram at right for topics)
- conducted February–April 2004
 - ▶ Additional data on Latino audiences collected in July 2004
- 550 completed interviews
 - ▶ 275 with "Dance Attenders": had attended at least one dance performance in the past 12 months
 - ▶ 275 with "Non-Attenders": had not attended a dance performance in the past 12 months
 - ▶ Attendance was self-reported by respondent, not determined by list source
- Respondents sampled from patron lists provided by 32 Chicago-area cultural organizations
 - ▶ Each organization provided up to 1,000 names to make data representative

Dance companies and presenters

Ballet Hispanico
 Centre East
 Chicago Human Rhythm Project
 Columbia College
 Dance Chicago
 Dance Cuba
 Ensemble Espanol
 Gus Giordano
 Hubbard Street
 Joffrey Ballet
 Link's Hall
 Lucky Plush
 Luna Negra
 Melissa Thodos & Dancers
 Muntu
 Museum of Contemporary Art
 River North

Non-dance organizations

Art Institute of Chicago
 Chicago Opera Theater
 Chicago Shakespeare Theater
 Court Theater
 The DuSable Museum
 The Field Museum
 The Goodman Theater
 The Lookingglass Theater
 The Mexican Fine Arts Center
 MCA (music performances)
 The Old Town School of Folk Music
 The Redmoon Theater
 Victory Gardens Theater
 The Writers' Theater
 WTTW



DANCE AUDIENCE SURVEY

Summary Comparison

Of Dance Attenders and Non-Attenders

Dance Attenders and Non-Attenders are more similar than we had expected

	Dance Attenders	Non-Attenders
Dance attendance	<ul style="list-style-type: none"> Similar percentage had ever attended dance (100%, 92%) 	
	<ul style="list-style-type: none"> More likely to have ever attended ballet, tap, jazz, modern/contemporary 	<ul style="list-style-type: none"> Slightly more likely to have ever attended Broadway musicals
	<ul style="list-style-type: none"> Similar percentage had ever attended culturally specific dance 	
	<ul style="list-style-type: none"> Dance Attenders only slightly more likely to have attended dance <u>performances</u> as a child 	
	<ul style="list-style-type: none"> Dance Attenders much more likely to have taken dance <u>classes</u> as a child 	
Other cultural activity	<ul style="list-style-type: none"> Attend art museums, art galleries, opera, and theater more frequently 	<ul style="list-style-type: none"> Attend music, non-art museums (science, nature, history), and zoos, and botanic gardens <u>as</u> frequently as Dance Attenders
	<ul style="list-style-type: none"> Dance Attenders more likely than Non-Attenders to do artistic/creative activities themselves 	
Attitudes	<ul style="list-style-type: none"> More likely to say their friends turn to them for recommendations on cultural activities 	<ul style="list-style-type: none"> More likely to want to know what to expect when attending performing arts
	<ul style="list-style-type: none"> More likely to enjoy avant garde performances 	<ul style="list-style-type: none"> More likely to say that when they attend a performing arts event the most important thing is that it be fun and entertaining
	<ul style="list-style-type: none"> Equally likely to want to understand the meaning behind the art, to enjoy performances from different cultures, and to say ticket price is important 	
Motivations (top 5 rated)	<ul style="list-style-type: none"> Reputation of company/dancers 	[Redacted]
	<ul style="list-style-type: none"> Performance location 	
	<ul style="list-style-type: none"> Getting good seats 	
	<ul style="list-style-type: none"> Ticket prices 	
	<ul style="list-style-type: none"> Seeing works they haven't seen before 	

Dance Attenders and Non-Attenders are more similar than we had expected (cont.)

	Dance Attenders	Non-Attenders
Benefits	<ul style="list-style-type: none"> ▪ Seeing something beautiful 	<ul style="list-style-type: none"> ▪ Being intellectually challenged/stimulated
Note: For Dance Attenders, we asked about benefits of dance; for Non-Attenders, we asked about benefits of performing arts	<ul style="list-style-type: none"> ▪ Being entertained 	
	<ul style="list-style-type: none"> ▪ Seeing something new or surprising 	
	<ul style="list-style-type: none"> ▪ Feeling excited 	
	<ul style="list-style-type: none"> ▪ Feeling awed 	
	<ul style="list-style-type: none"> ▪ Being transported elsewhere 	
		<ul style="list-style-type: none"> ▪ Equally likely to cite: feeling relaxed, feeling spiritually uplifted
Barriers (top 2 rated)		<ul style="list-style-type: none"> ▪ Preferring other performing arts
		<ul style="list-style-type: none"> ▪ Too busy to attend
Demographics	<ul style="list-style-type: none"> ▪ Equal on geography, income, having children at home, and sexual orientation 	
	<ul style="list-style-type: none"> ▪ More female 	<ul style="list-style-type: none"> ▪ More male
Growth potential	<ul style="list-style-type: none"> ▪ High potential segments exist in both groups (see segmentation, below) 	

Audience Segmentation

About this segmentation

Recommended target segments

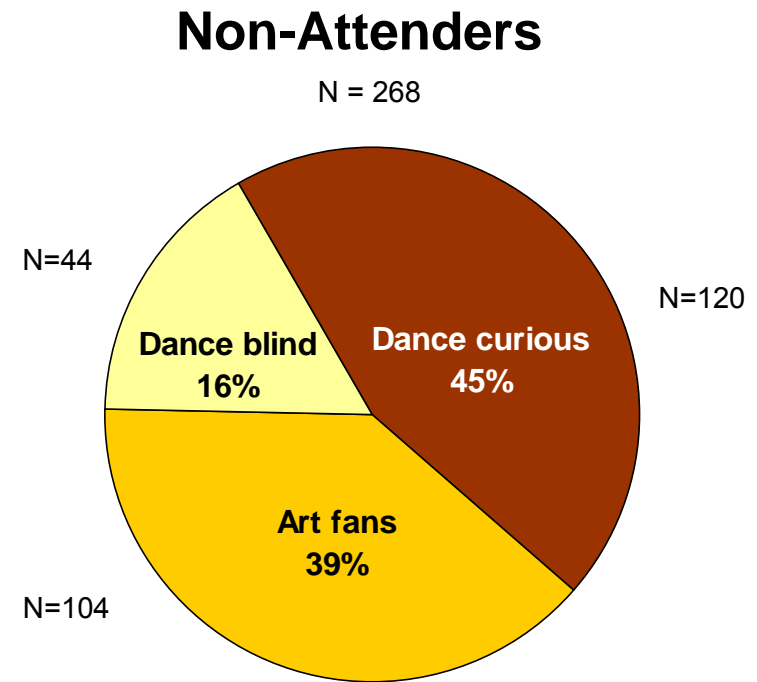
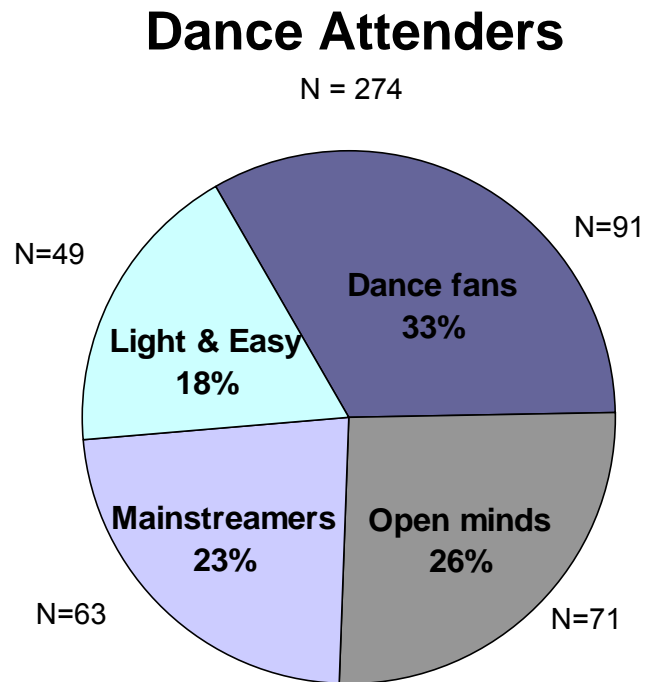
Segment profiles

This segmentation was designed to reveal groups of respondents with similar attitudes and needs

- Focus groups had suggested that frequency of dance attendance was not a sufficient basis for segmentation
- Statistical analysis of survey data confirmed this
- We wanted a psychographic segmentation, since attitudes and needs drive behavior
- We selected all attitudinal variables for use in the segmentation (see starred items in diagram)
- We ran a "cluster analysis" to identify groups of respondents who answered those questions similarly
- We analyzed the Dance Attenders separately from the Non-Attenders, since some of their survey questions were different
- The analysis revealed 4 attitudinal segments in the Dance Attenders half and 3 attitudinal segments in the Non-Attenders half
- We then profiled each segment by comparing their responses across all other (non-attitudinal) survey questions



We found 4 attitudinal segments in the Dance Attender group and 3 in the Non-Attender group



- All segments are large enough to be statistically significant
 - ▶ However, because our Dance Attender and Non-Attender groups were formed by quota rather than discovered in a random population, it is difficult to gauge the absolute size of each segment in the Chicago area
- In the following pages, we'll compare the segments to each other, citing where there is a higher incidence of a given response occurring in one segment than in others

Recommended target segments for the dance community:

High Growth Potential

■ **Dance Fans** (segment of Dance Attenders)

▶ Rationale:

- Most interested in attending more dance and seeing new types of dance
- Highly eclectic taste can lead to trying new dance styles
- Strong benefits derived from dance

▶ Caveats and needs:

- Mixed income – some wealthy, some not
- Driven by new works, company reputation and wanting to delve deeper into the art of dance

■ **Dance Curious** (segment of Non-Attenders)

▶ Rationale:

- Moderate level of past dance attendance but strong future interest
- Strong potential benefits derived from dance
- Appear very open to influence by marketing, better information about dance and removal of practical barriers

▶ Caveats and needs:

- Practical barriers may be high
- Price sensitive
- May be high maintenance

Recommended target segments for the dance community:

Moderate Growth Potential

- **Open-minds** (segment of Dance Attenders)
 - ▶ Rationale:
 - Strong benefits derived from dance
 - High disposable income
 - Healthy interest in attending more dance styles
 - ▶ Caveats and needs:
 - Focused on modern and some ballet
 - Parking and hassle-factor need to be improved, especially since many live in the suburbs

- **Light & Easy** (segment of Dance Attenders)
 - ▶ Rationale:
 - Lightest arts and dance attendance, but interested in exploring new styles of dance
 - ▶ Caveats and needs:
 - Price sensitive
 - Do not derive the same intensity of benefit from dance as other Attenders

- **Art Fans** (segment of Non-Attenders)
 - ▶ Rationale:
 - Most say they prefer other performing arts, but they also say they enjoy dance performances
 - High performing arts attendance
 - High disposable income
 - ▶ Caveats and needs:
 - Many say that more information on dance would motivate them to attend

Low growth potential segments for the dance community

- **Mainstreamers** (segment of Dance Attenders)

- ▶ Rationale:

- Lowest interest in attending new styles of dance
- A trifle set in their ways

- ▶ Caveats and needs:

- Currently focused on ballet and musicals
- May be driven by elements other than benefits (e.g. social occasion, badge value)
- Most wealthy segment, least price sensitive
- Could be moderate crossover growth target for tap and jazz

- **Dance Blind** (segment of Non-Attenders)

- ▶ Rationale:

- Many say they simply do not enjoy dance performances
- Most say they prefer other arts activities
- Low exposure to dance as a child

- ▶ Caveats and needs:

- Has more than twice as many men as some other segments
- A sliver of this group could possibly be brought in with theater partnerships
- A wealthy segment that's not price sensitive

Profile of Dance Attenders Segment 1: “Dance Fans”

- Dance attendance
 - ▶ heaviest dance attenders (~8 performances/year)
 - ▶ eclectic in dance tastes – most Dance Fans seem to like all types
 - ▶ attend all types of dance more frequently than other groups, with the exception of Broadway Musicals
- Other cultural activities
 - ▶ higher incidence of participation in creative/artistic activity of their own
 - ▶ higher incidence of attendance at art galleries, theater, and history museums
- Attitudes: higher incidence than other segments of saying that...
 - ▶ their friends turn to them for recommendations on cultural activities
 - ▶ they love avant garde performances
 - ▶ they enjoy seeing performances from different cultures
 - ▶ it's important to know what to expect when attending the performing arts
 - ▶ understanding the meaning behind the art enhances the experience
- Motivators: more interested than average in seeing new works
- Benefits: get more than any other segment from dance (highest ratings on most benefits)
- Demographics: higher incidence of being younger, city residents, and African-American
- Growth potential: **high**

Profile of Dance Attenders Segment 2: “Open Minds”

- Dance attendance
 - ▶ medium (~3 dance performances/year)
 - ▶ over lifetime, very likely to have attended ballet, modern/contemporary, and culture-specific dance
 - ▶ in past year, most focused on modern/contemporary, but also attending some ballet and culture-specific dance
- Other cultural activities
 - ▶ higher incidence of attending botanic gardens and science/nature museums
 - ▶ lower incidence of attending theater
- Attitudes: more likely than other segments to say that:
 - ▶ price is an important factor in choosing cultural activities
 - ▶ they enjoy performances from different cultures
 - ▶ they love to attend avant garde performances
 - ▶ they are independent and confident in their judgment
 - least interested in reviews and reputations, most willing to go into a performance not knowing what to expect
- Motivators: higher incidence of wanting to know the titles of the works being performed and desiring convenient parking
- Benefits: a wide range, especially appreciation of beauty and feelings of awe
- Demographics: age concentrated between 35-54, middle-income, and heterosexual
- Growth potential: **moderate**

Profile of Dance Attenders Segment 3: “Mainstreamers”

- Dance attendance
 - ▶ medium (~4 dance performances/year)
 - ▶ highest incidence of ballet attendance with Broadway musicals as a secondary interest
 - ▶ much less likely to attend culture-specific dance
 - ▶ average early dance exposure and training
- Other cultural activities
 - ▶ high involvement in theater, concerts, and particularly, opera-going
- Attitudes
 - ▶ less likely than others to be interested in dance from different cultures
 - ▶ less likely to enjoy avant garde productions
 - ▶ more likely to focus on understanding the meaning of artworks or performances
- Motivators
 - ▶ seeing new works is less important to Mainstreamers than to other segments
 - ▶ having good seats is slightly more important to them than to other segments
- Benefits: significantly less likely to derive benefits from attending dance
- Demographics:
 - ▶ older than other segments
 - ▶ higher incidence of being wealthy, white and male than other dance-attender segments
 - ▶ higher incidence of living on the North Shore than other segments (though majority still lives in the city)
- Growth potential: **low**

Profile of Dance Attenders Segment 4: “Light & Easy”

- Dance attendance
 - ▶ lightest dance attenders (~2 times/year)
 - ▶ have attended all types of dance, but within the past year have focused more on ballet, musicals and cultural dance
 - ▶ significantly lower incidence of recent tap, jazz, and modern/contemporary dance attendance
 - ▶ slightly lower incidence of childhood dance exposure/education
- Other cultural activities
 - ▶ average interest in the visual and performing arts
- Attitudes
 - ▶ less interested than other segments in dance performances that are avant garde
 - ▶ more interested in knowing what to expect before attending a dance performance
- Motivators: more likely than other segments to want good seats and to want to have someone to go with
- Benefits: fewest benefits derived from dance of all attender segments
- Demographics: higher proportion of Hispanics, GLBT individuals, and city dwellers than other segments
 - ▶ lowest disposable income of all segments
- Growth potential: **moderate**

Profile of Non-Attendees Segment 1: “Dance Curious”

- Dance attendance/history
 - ▶ strongest interest of all Non-Attendees in attending dance in the future
 - ▶ average dance attendance in the past compared to other Non-Attender segments
 - ▶ more exposure to cultural dance and tap than other segments
 - ▶ higher exposure than Dance Blind segment to early dance attendance/education
- Other cultural activities
 - ▶ lower incidence of attending other cultural activities, except botanic gardens
- Attitudes: more likely than other Non-Attender segments to...
 - ▶ feel that price is important
 - ▶ want to know what to expect at performances
 - ▶ enjoy performances from different cultures
 - ▶ want the performance to be fun and entertaining
 - ▶ enjoy avant garde performances
- Benefits
 - ▶ derives a greater range and depth of benefits than Dance Blind segment
 - ▶ derives a greater sense of awe, transport, and spiritual uplift from arts than Art Fans segment
- Barriers
 - ▶ high incidence of saying they're too busy or that attending is too much of a hassle
 - ▶ highly price conscious
 - ▶ many say they are not receiving adequate information on dance activities

Profile of Non-Attendees Segment 1: “Dance Curious” (cont.)

- Demographics: higher incidence of being African-American, Hispanic, female, middle-income, South Suburban residents, and having children
- Growth potential: **moderate-high** (high interest but high barriers/needs)

Profile of Non-Attendees Segment 2: “Art Fans”

- **Dance attendance/history**
 - ▶ healthy incidence of attending most types of dance at least once (particularly high for ballet, Broadway musicals and modern dance)
 - ▶ moderate interest in attending dance in the future
 - ▶ early dance exposure/training similar to Dance Curious, greater than Dance Blind
- **Other cultural activities**
 - ▶ very high rates of attendance at art museums, art galleries, music performances and particularly the theater
 - ▶ almost all say they enjoy attending other art/cultural activities more than dance performances
- **Attitudes**
 - ▶ more likely than other Non-Attendees to say friends turn to them for cultural recommendations
 - ▶ more likely to say they want the arts to be fun and entertaining
 - ▶ more likely to want to understand the meaning behind the art
 - ▶ less likely to be interested in avant garde performances
 - ▶ less likely to be interested in arts from other cultures
- **Benefits: slightly less likely than Dance Curious segment and all Dance Attender segments to derive strong benefits from attending performing arts**
 - ▶ much less likely to be intellectually stimulated or spiritually uplifted from arts experiences

(continued)

Profile of Non-Attendees Segment 2: “Art Fans” (cont.)

- Barriers
 - ▶ higher incidence of saying they prefer other performing arts,
 - ▶ many also say they are too busy to attend
 - ▶ cost is a very modest barrier to this group
- Demographics
 - ▶ higher incidence of living in the suburbs, being older, white, and middle income
- Growth potential: **moderate**

Profile of Non-Attendees Segment 3: “Dance Blind”

- Dance attendance/history
 - ▶ lower incidence than Dance Curious segment of attendance at most types of dance
 - ▶ lowest dance exposure/training as a child
- Other cultural activities
 - ▶ higher incidence of attending art museums and music performances than other Non-Attender segments
- Attitudes
 - ▶ lower interest in avant garde performances, least price sensitive
 - ▶ more likely to say it's important to understand the meaning behind the art
- Benefits: derive many benefits from arts attendance, but are less likely than others to feel awed or be spiritually uplifted
- Barriers
 - ▶ more likely to prefer other arts to dance and to say they don't enjoy dance
 - ▶ more likely to give “no performances appealed” as a reason for not attending dance
 - ▶ less likely to say performances are too costly or too much of a hassle
- Demographics: more likely than other segments to be male (51%), white, wealthy, GLBT, and to live in the North Shore suburbs
- Growth potential: **low**

Recommendations

Crossover targeting

Other high-potential marketing strategies

Benefits to emphasize, by dance type

The entire dance community could benefit from crossover marketing with a number of cultural institutions

- This research suggests there is a short list of prominent cultural institutions which Chicago dance patrons and the dance-interested public attend on a regular basis and with which crossover marketing would be successful for most dance companies
 - ▶ **Museums:** The Art Institute, The Field Museum, Museum of Science and Industry, Museum of Contemporary Art
 - ▶ **Music:** Chicago Symphony Orchestra, Lyric Opera and Chicago Sinfonietta
 - ▶ **Theater:** The Goodman Theater, Steppenwolf and Chicago Shakespeare Theater
 - ▶ *All dance companies could consider partnerships with these "core crossover organizations"*
- These organizations may be good ones to partner with to promote and disseminate information about dance events
 - ▶ However, because these are large organizations, they may not be the best means of connecting smaller dance companies to individuals who would be most likely to attend their dance performances
 - smaller museums or arts organizations may serve these purposes better
- The strongest potential for crossover marketing appears to be with museums and musical ensembles; theater audiences attend less dance
 - ▶ But many dance-goers are avid theater patrons too
 - ▶ Partnerships with theaters should be carefully targeted for certain styles of dance, as detailed in the following pages

Specific Crossover Marketing Recommendations: Ballet

- **Within dance category:** Ballet can market successfully through partnerships with most other forms of dance
 - ▶ Tap, jazz, Broadway musicals and culture-specific dance have roughly equal audience equal with ballet
 - ▶ Modern/contemporary dance has more limited audience crossover

- **Outside dance category:**
 - ▶ Best core (large) crossover organizations for ballet:
 - The Lyric Opera
 - The Chicago Sinfonietta
 - The Art Institute of Chicago
 - The Chicago Shakespeare Theater
 - Chicago Symphony Orchestra
 - The Field Museum
 - Steppenwolf Theater

 - ▶ Best smaller crossover organizations for ballet:
 - The Chicago Historical Society
 - The Writer's Theater
 - The Adler Planetarium

Specific Crossover Marketing Recommendations: Tap

- **Within dance category:** Tap should target its dance marketing partners carefully, emphasizing:
 - ▶ Jazz dance companies
 - ▶ Broadway Musical dance companies (to a lesser degree)

- **Outside dance category:**
 - ▶ Best core (large) crossover organizations for Tap:
 - The Chicago Shakespeare Theater
 - The Art Institute of Chicago

 - ▶ Best smaller crossover organizations for Tap:
 - The Old Town School of Folk Music
 - Pick Staiger Concert Hall
 - Ravinia
 - The Chicago Historical Society
 - The DuSable Museum
 - The South Shore Cultural Center
 - The Adler Planetarium

Specific Crossover Marketing Recommendations: Jazz

- **Within dance category:** For dance marketing partnerships, Jazz companies should focus on:
 - ▶ Modern/Contemporary (well-targeted, especially for developing new patrons)
 - ▶ Broadway Musical dance companies
 - ▶ Tap (a smaller market, but with strong crossover potential)

- **Outside dance category:**
 - ▶ Best core (large) crossover organizations for Jazz:
 - The Steppenwolf Theater
 - The Museum of Contemporary Art
 - Chicago Symphony Orchestra
 - The Art Institute of Chicago
 - The Goodman Theater

 - ▶ Best smaller crossover organizations for Jazz:
 - The Old Town School of Folk Music
 - The Lookingglass Theater
 - Pick-Staiger Concert Hall
 - Chicago Historical Society
 - Chicago Cultural Center

- Jazz had the highest crossover potential with theater of any dance form

Specific Crossover Marketing Recommendations: Modern/Contemporary

- **Within dance category:** Modern/contemporary companies should partner with:
 - ▶ Jazz dance companies (excellent crossover)
 - ▶ Culturally-specific dance ensembles

- **Outside dance category:**
 - ▶ Best core (large) crossover organizations for modern/contemporary dance:
 - The Museum of Contemporary Art
 - Chicago Symphony Orchestra
 - Steppenwolf Theater
 - The Art Institute of Chicago

 - ▶ Best smaller crossover organizations for modern/contemporary dance:
 - The Court Theater
 - Ravinia
 - The DuSable Museum
 - The Chicago Historical Society
 - Pick Staiger Concert Hall
 - Chicago Chamber Musicians

Specific Crossover Marketing Recommendations: Broadway Musicals

- **Within dance category:** Broadway Musical-style companies should partner with:
 - ▶ Jazz dance companies
 - ▶ Tap performances

- **Outside dance category:**
 - ▶ Best core (large) crossover organizations for Broadway Musicals:
 - The Art Institute of Chicago (Strong potential)
 - The Museum of Contemporary Art (Sounds odd, but, data indicate there's a lot of crossover)
 - Chicago Symphony Orchestra
 - The Goodman Theater
 - The Lyric Opera
 - Chicago Shakespeare Theater

 - ▶ Best smaller crossover organizations for Broadway Musicals:
 - The Mexican Fine Arts Museum
 - Ravinia
 - Victory Gardens Theater

Specific Crossover Marketing Recommendations: Culturally-Specific Dance

- **Within dance category:** Culturally-specific dance companies may want to partner with:
 - ▶ Modern or Contemporary companies
 - ▶ Jazz dance companies
 - ▶ Not ballet: there's some indication that the avid ballet-goer may be a hard market for culturally-specific dance to crack

- **Outside dance category:**
 - ▶ Best core crossover organizations for culturally-specific dance:
 - Museum of Contemporary Art
 - The Art Institute of Chicago
 - The Goodman Theater
 - Chicago Shakespeare Theater

 - ▶ Best smaller crossover organizations for culturally-specific dance:
 - Chicago Cultural Center
 - The Old Town School of Folk Music
 - The DuSable Museum
 - The Terra Museum of American History
 - Pick Staiger Concert Hall
 - Ravinia
 - Victory Gardens Theater

Other high-potential marketing strategies

- Increase awareness of dance companies and their performances
 - ▶ Half of Non-Attenders and two-thirds of Dance Attenders say that an area-wide dance web site would motivate them to attend more dance
 - they would want it to feature info on specific dance companies and choreographers, a performance calendar, video clips of specific works, links to venue/company websites, etc.
 - ▶ Consider an advertising campaign for Chicago-area dance as a category, with two objectives:
 1. reposition Chicago-area dance as an exciting, must-see part of the region's cultural life
 2. drive traffic to the area-wide dance web site
- Reduce parking issues and other “hassle” factors
 - ▶ Logistics continue to be an issue for both Dance Attenders and Non-Attenders
- Provide more background information on companies and works performed
 - ▶ Although of moderate interest to respondents overall, this is very important to a significant subset of both Dance Attenders and Non-Attender groups
- For certain segments, price promotions would also likely generate additional purchase
 - ▶ Open Minds, Dance Curious, Light & Easy and, to a lesser degree, Dance Fans are all at least moderately price sensitive
 - ▶ They are also the groups with the greatest interest in attending more dance performances – but many of them can't increase their activity at standard prices

The benefits that patrons report getting from each dance type suggest different marketing themes for different companies

- Individual dance companies can use the grid below to see which benefits are most likely to resonate with their audiences. Those benefits can be conveyed in a variety of company-appropriate ways in promotional materials, website, etc.
 - Example:** Patrons of Modern/Contemporary dance are much more likely than ballet patrons to say they enjoy seeing something new or surprising. So Hubbard Street Dance Chicago might want to promote newness and/or surprise in its marketing materials, whereas Joffrey Ballet might want to emphasize other benefits (beauty, being transported).

	Ballet	Tap	Jazz	Modern or Contemp.	Broadway musicals w/dance	Culture-specific dance
Seeing something beautiful	++	-	-	O	O	+
Being entertained	O	O	O	O	O	O
Feeling excited	O	-	O	O	-	+
Seeing something new or surprising	-	+	O	++	O	O
Being intellectually challenged or stimulated	O	O	O	++	O	O
Being transported elsewhere	+	+	+	+	-	++
Feeling relaxed	+	-	O	O	-	+
Feeling awed	O	-	+	+	-	+
Being spiritually uplifted	O	++	++	++	--	++

KEY:
 "++" means much more likely than average
 "+" means more likely than average
 "o" means average likelihood
 "-" means less likely than average
 "--" means much less likely than average

Benefits to emphasize (cont.)

- Ballet patrons tend to be motivated by a desire to see beauty and to feel transported
 - ▶ less driven by a desire for novelty, awe, or excitement
- Tap patrons tend to be motivated by a desire for spiritual uplift, to see something new and exciting, and to feel transported
 - ▶ less motivated by a desire for relaxation, beauty, or awe
- Jazz patrons tend to be motivated by a desire to feel a sense of awe, to get spiritual uplift, and to be transported
 - ▶ less focused on beauty than other patrons
- Modern/contemporary patrons have a particular capacity to enjoy a sense of novelty and intellectual challenge/stimulation from dance events
 - ▶ also tend to feel a stronger sense of awe, transport, and spiritual uplift than those who do not attend this type of dance
- Broadway musical patrons do not expect as strong a feeling of awe, beauty and spiritual uplift from attending dance
 - ▶ but are similar to other dance patrons in their expectations of novelty and relaxation
- Culturally-specific dance patrons seek more excitement, awe, beauty, and spiritual uplift from dance performances than other patrons
 - ▶ derived more benefits from dance than other patrons did in almost every way

Detailed Analysis

- Detailed segment comparisons
 - Dance attendance
 - Other cultural activity
 - Attitudes
 - Motivations
 - Benefits/barriers
 - Demographics
 - Growth potential
- Crossover dynamics
- Marketing tactics
- Awareness and attendance by segment

How to read the following tables

- Many of the pages following include tables like the one below. Here's what to look for:

Question asked

Overall response from Dance Attendees

Response from each Dance Attendee segment

Overall response from Non-Attendees

Response from each Non-Attendee segment

"Have you ever attended a professional dance performance in this style?" (Percent responding 'yes')

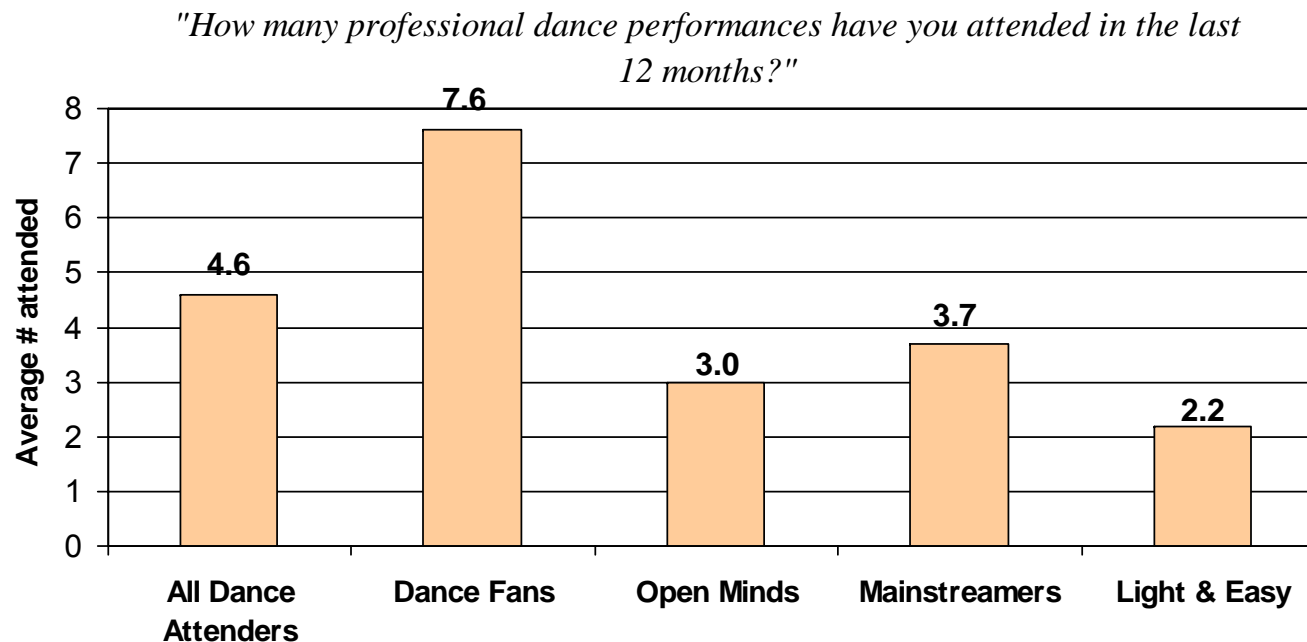
	Dance Attendees					Non-Attendees			
	All Dance Attendees	Dance Fans	Open Minds	Main-streamers	Light & Easy	All Non-Attendees	Dance Curious	Art Fans	Dance Blind
Ballet	94%	95%	94%	100%	86%	81%	74%	89%	81%
Tap	56%	76%	48%	46%	45%	44%	51%	42%	35%
Jazz	65%	89%	58%	43%	61%	49%	57%	51%	23%
Modern or contemporary	84%	91%	100%	59%	78%	63%	60%	72%	51%
Broadway musicals with dance	70%	77%	58%	71%	73%	72%	68%	81%	67%
Culturally specific dance	55%	69%	66%	0%	82%	51%	55%	52%	35%

Possible answers to the question

- To compare segments, look at their percentage levels on a particular row to see which ones are highest and lowest
 - A higher response will usually be a more positive one

Dance Attenders had gone to an average of 4 or 5 dance performances in the past year

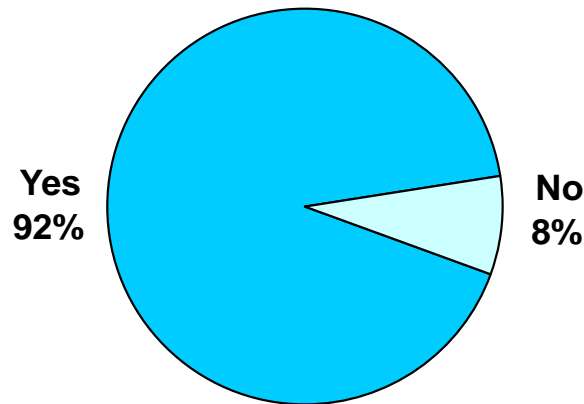
- Recent dance attendance varied significantly by segment
 - ▶ Dance Fans had attended more than twice as many performances, on average, than any other segment
 - ▶ Mainstreamers were the second-most-active group; they attended much more than Light & Easies did



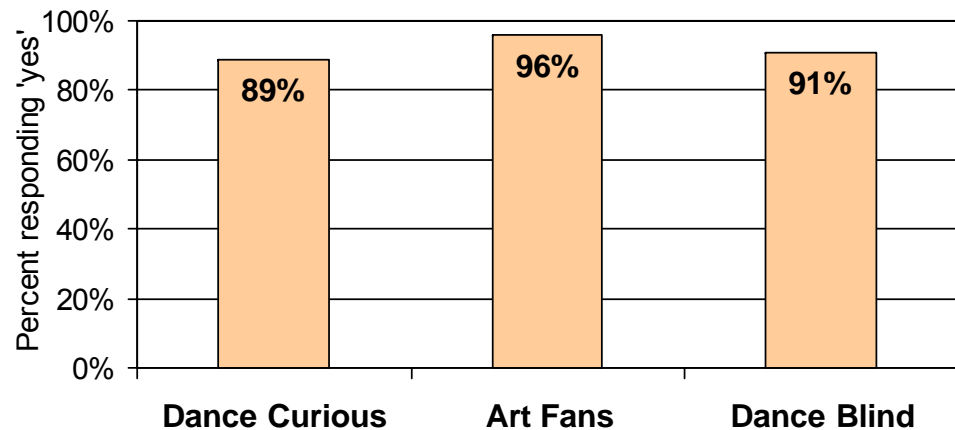
92% of Non-Attendees said they had attended a professional dance performance in the past

- Among Non-Attendees, almost all of the Art Fans segment (and most of the other segments) had attended a professional dance performance at some point in their lives

"Have you ever attended a professional dance performance?"



"Have you ever attended a professional dance performance?"



Ballet was the most commonly attended form of dance, with almost all Dance Attenders having seen a performance

"Have you ever attended a professional dance performance in this style?" (Percent responding 'yes')

	Dance Attenders					Non-Attenders			
	All Dance Attenders	Dance Fans	Open Minds	Main-streamers	Light & Easy	All Non-Attenders	Dance Curious	Art Fans	Dance Blind
Ballet	94%	95%	94%	100%	86%	81%	74%	89%	81%
Tap	56%	76%	48%	46%	45%	44%	51%	42%	35%
Jazz	65%	89%	58%	43%	61%	49%	57%	51%	23%
Modern or contemporary	84%	91%	100%	59%	78%	63%	60%	72%	51%
Broadway musicals with dance	70%	77%	58%	71%	73%	72%	68%	81%	67%
Culturally specific dance	55%	69%	66%	4%	82%	51%	55%	52%	35%

- Dance Attenders were much more likely than Non-Attenders likely to have seen modern dance or jazz dance performances
- Interestingly, levels of exposure to culturally-specific dance and Broadway musicals with dance were about the same among Attenders and Non-Attenders

The four Dance Attender segments focused on different types of dance

"What types of dance performances have you attended in the last 12 months?" (Percent responding 'yes')

	Dance Attenders				
	All Dance Attenders	Dance Fans	Open Minds	Main-streamers	Light & Easy
Ballet	71%	78%	51%	100%	49%
Tap	24%	60%	0%	16%	4%
Jazz	35%	88%	15%	5%	6%
Modern or Contemporary	58%	85%	99%	16%	0%
Broadway musicals with dance	42%	58%	17%	46%	41%
Culturally specific dance	30%	42%	28%	2%	47%

- Patrons from all four segments attended ballet performances
- Dance Fans attended all styles of dance at quite high rates
 - ▶ They were by far the segment most active in attending jazz and tap dance performances
- The defining enthusiasm for Open Minds was modern/contemporary dance
- Mainstreamers were characterized by a passion for Ballet to the exclusion of most other forms—except Broadway musical dance
- Light & Easy had mixed interests across three styles: ballet, musicals and cultural dance
 - ▶ Very little interest in tap, jazz or modern/contemporary

Childhood exposure to dance did influence later attendance

- Both attending performances and taking classes as a child are associated with having attended dance within the last year, but taking classes is a much stronger influence
- However, neither childhood classes nor attendance directly influenced the frequency of dance attendance within our Attender and Non-Attender categories
- Among Non-Attendees, the Dance Curious segment was the most likely to have gone to performances growing up or taken dance lessons
- The majority of Dance Blind respondents had neither taken dance classes nor attended performances growing up

"How frequently did you attend dance performances when you were growing up?" Percent responding:

	Dance Attenders					Non-Attendees			
	All Dance Attenders	Dance Fans	Open Minds	Main-streamers	Light & Easy	All Non-Attendees	Dance Curious	Art Fans	Dance Blind
Often	20%	36%	10%	16%	10%	13%	17%	12%	5%
Sometimes	26%	22%	30%	22%	36%	27%	33%	29%	5%
Rarely	32%	24%	33%	37%	36%	31%	28%	32%	37%
Never	22%	18%	27%	24%	18%	29%	22%	26%	53%

"Did you take any dance classes growing up?" Percent responding:

Yes	57%	64%	59%	52%	48%	35%	38%	40%	18%
No	43%	36%	41%	48%	52%	65%	62%	60%	82%

Attending art museums and music and theater performances were the most popular non-dance cultural activities

- Dance Fans had high attendance rates at art galleries, but low rates at opera (where the Mainstreamers congregated)
- Light & Easy had lower attendance rates at all cultural events than other Dance Attenders
- Among Non-Attenders, Dance Blind individuals attended music performances, museums and galleries at the highest rates
 - ▶ Art Fans were particularly avid theater goers
 - ▶ Dance Curious patrons had slightly lower participation rates in across the performing arts than their peers

"How often have you attended or visited the following types of organizations in the last 12 months?"
Average visits per respondent

	Dance Attenders					Non-Attenders			
	All Dance Attenders	Dance Fans	Open Minds	Main-streamers	Light & Easy	All Non-Attenders	Dance Curious	Art Fans	Dance Blind
Professional dance performance	4.6	7.6	3.0	3.7	2.2				
Professional theater performance	4.3	4.4	4.1	4.7	4.0	4.1	3.1	5.0	4.9
Professional music performance	3.9	3.6	4.1	4.6	3.3	3.9	3.2	4.1	5.2
Art museum	3.8	3.8	3.9	3.9	3.3	3.4	2.8	3.6	4.3
Art gallery	2.5	2.7	2.5	2.1	2.4	2.2	2.2	2.1	2.7
Professional opera performance	2.3	1.5	2.3	3.5	2.2	1.9	1.1	2.4	2.6
Botanic garden or nature center	2.0	2.3	2.1	1.9	1.4	1.8	1.6	2.1	2.1
Science or nature museum	1.7	1.9	1.9	1.6	1.4	1.7	1.9	1.5	1.8
Zoo	1.4	1.6	1.6	1.3	1.2	1.4	1.4	1.3	1.5
History museum	1.1	1.3	1.0	1.0	1.0	1.1	1.3	1.0	1.0

The Dance Fan segment was by far the most active group in terms of personal artistic activity

- Rates of participation on art activities were fairly uniform among other segments, except for Open Minds, who had had slightly higher rates of involvement in arts activities than other groups

"Do you do any artistic or creative activities now?"
Percent responding:

	Dance Attenders					Non-Attenders			
	All Dance Attenders	Dance Fans	Open Minds	Main-streamers	Light & Easy	All Non-Attenders	Dance Curious	Art Fans	Dance Blind
Yes	60%	73%	58%	47%	51%	47%	45%	49%	47%
No	40%	27%	42%	53%	49%	53%	55%	51%	53%

Dance Fans say that others seek their advice on culture; respondents are split in how much they seek the avant garde

- Open Minds, Dance Fans, and Dance Curious were the most enthusiastic about seeing avant garde performances
 - ▶ Dance Blind, Art Fans, Light & Easies and Mainstreamers, were the least interested in cutting edge

"My friends turn to me for recommendations on what cultural things to see and do." Percent responding:

	Dance Attenders					Non-Attenders			
	All Dance Attenders	Dance Fans	Open Minds	Main-streamers	Light & Easy	All Non-Attenders	Dance Curious	Art Fans	Dance Blind
Agree strongly	32%	42%	23%	29%	31%	22%	15%	30%	23%
Agree somewhat	55%	49%	71%	46%	55%	50%	59%	52%	38%
Disagree somewhat	10%	7%	6%	21%	8%	17%	16%	12%	23%
Disagree strongly	3%	2%	0%	5%	6%	11%	10%	6%	18%

"I love to attend avant garde or cutting edge performances." Percent responding:

Agree strongly	27%	34%	31%	23%	13%	20%	31%	10%	15%
Agree somewhat	44%	41%	45%	37%	58%	43%	42%	52%	36%
Disagree somewhat	23%	23%	18%	27%	24%	24%	21%	26%	26%
Disagree strongly	6%	2%	6%	13%	4%	14%	6%	12%	23%

Price is only a secondary influence on dance attendance, and most respondents enjoy performances from different cultures

- Dance Curious (76%), Light & Easy (76%) and Open Minds (75%) are the most price-conscious segments
 - ▶ Mainstreamers, Art Fans and Dance Bind segments are the least concerned about prices
- Among Non-Attendees, Dance Curious most enjoy seeing performances from different cultures
 - ▶ Mainstreamers are the least interested in cultural dance among Dance Attendees

"Price is an important consideration for me when choosing which cultural activities I do." Percent responding:

	Dance Attendees					Non-Attendees			
	All Dance Attendees	Dance Fans	Open Minds	Mainstreamers	Light & Easy	All Non-Attendees	Dance Curious	Art Fans	Dance Blind
Agree strongly	31%	30%	34%	25%	39%	25%	36%	22%	14%
Agree somewhat	41%	41%	41%	43%	37%	41%	40%	40%	44%
Disagree somewhat	16%	18%	18%	17%	10%	17%	15%	17%	20%
Disagree strongly	12%	12%	7%	14%	14%	17%	9%	21%	23%

"I really enjoy seeing performances from different cultures." Percent responding:

	Dance Attendees					Non-Attendees			
	All Dance Attendees	Dance Fans	Open Minds	Mainstreamers	Light & Easy	All Non-Attendees	Dance Curious	Art Fans	Dance Blind
Agree strongly	53%	62%	65%	33%	47%	48%	55%	38%	47%
Agree somewhat	38%	35%	28%	48%	43%	38%	39%	31%	39%
Disagree somewhat	8%	2%	7%	16%	8%	12%	6%	27%	11%
Disagree strongly	1%	1%	0%	3%	2%	2%	1%	4%	3%

Dance Attenders had less need than Non-Attenders to know what to expect from the performance

- Open Minds, with their affinity for contemporary dance, are most willing to go in not knowing what to expect
- Most segments want arts performances experiences to be fun and entertaining
 - ▶ This may be particularly true for the Dance Curious Non-Attenders

<i>"It's important for me to know what to expect when I attend the performing arts."</i> Percent responding:	Dance Attenders					Non-Attenders			
	All Dance Attenders	Dance Fans	Open Minds	Main-streamers	Light & Easy	All Non-Attenders	Dance Curious	Art Fans	Dance Blind
Agree strongly	17%	21%	11%	17%	21%	31%	33%	28%	29%
Agree somewhat	35%	38%	31%	37%	38%	44%	45%	45%	43%
Disagree somewhat	38%	31%	50%	35%	33%	20%	19%	19%	21%
Disagree strongly	9%	10%	8%	11%	9%	5%	2%	9%	7%

<i>"When I attend performances, the most important thing for me is that it's fun and entertaining."</i> Percent responding:	Dance Attenders					Non-Attenders			
	All Dance Attenders	Dance Fans	Open Minds	Main-streamers	Light & Easy	All Non-Attenders	Dance Curious	Art Fans	Dance Blind
Agree strongly	38%	40%	38%	34%	41%	49%	61%	51%	33%
Agree somewhat	45%	35%	46%	54%	44%	37%	30%	37%	46%
Disagree somewhat	15%	23%	17%	7%	13%	11%	9%	9%	18%
Disagree strongly	2%	2%	11%	4%	1%	3%	0%	4%	4%

Several segments were more focused on understanding the meaning of the works or performances they see

"Understanding the meaning behind the art or what the artist was thinking really enhances the experience for me."
Percent responding:

	Dance Attenders					Non-Attenders			
	All Dance Attenders	Dance Fans	Open Minds	Main-streamers	Light & Easy	All Non-Attenders	Dance Curious	Art Fans	Dance Blind
Agree strongly	42%	46%	37%	55%	27%	48%	47%	53%	45%
Agree somewhat	45%	42%	52%	32%	55%	42%	43%	35%	48%
Disagree somewhat	10%	6%	10%	11%	14%	8%	9%	9%	8%
Disagree strongly	3%	7%	1%	2%	4%	2%	2%	4%	3%

- Dance Fans, Mainstreamers and all of the Non-Attending segments all appeared strongly driven to understand the art and performances they attend
 - ▶ These groups may be adopting the traditional role of arts connoisseur in their approach to the arts
 - ▶ For Non-Attenders, the combination of a strong desire to understand the meaning behind performances and their lesser familiarity with dance forms may discourage some from attending dance events

All four Dance Attender groups were conscious of the reputation of the company in their purchase decisions

- Dance Fans and most wanted to see works they had not seen before
- Newspaper reviews were not considered important by most patrons – especially Dance Fans and Open Minds -- who may be the most confident in their own judgments
- Light & Easy and Mainstreamers were the most concerned about having good seats
 - ▶ Light & Easies were the most concerned about ticket prices and having someone to attend with

"As you decide whether or not to attend a particular dance performance, how important is each of the following elements?"
 Average ratings on 1 to 5 scale (1 = 'not at all' and 5 = 'very'):

	Dance Attenders				
	All Dance Attenders	Dance Fans	Open Minds	Main-streamers	Light & Easy
Reputation of company or dancers	3.9	4.0	3.7	4.1	3.9
Performance location or theater	3.9	4.0	3.9	3.7	4.0
Good seats	3.7	3.7	3.5	3.9	4.0
Ticket price	3.6	3.6	3.6	3.5	3.7
Seeing a work you haven't seen before	3.6	3.7	3.6	3.5	3.4
Having seen the company before	3.3	3.5	3.3	3.5	3.0
Knowing titles of works	3.0	3.4	2.5	3.1	2.8
Having someone to go with	3.3	3.2	3.3	3.2	3.6
Convenient parking	3.1	3.1	3.3	3.2	2.9
Newspaper reviews	2.9	2.8	2.8	3.0	3.2

Dance Attenders cited seeing something beautiful and being entertained as the top benefits they get from attending dance

- Dance Fans and Open Minds were the segments most likely to get significant benefits from dance
 - ▶ Light & Easies appreciate the beauty of dance performances, the excitement and entertainment value as much as many other patrons,
 - ▶ They don't draw the same sense of spiritual uplift, transport, awe, or intellectual excitement from dance as other groups

'How much does each phrase describe either how you feel when you see a dance performance or what some of the benefits are to you of seeing dance?'

(Average ratings, 1 = 'not at all' and 5 = 'very well')

	Dance Attenders				
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy
Seeing something beautiful	4.5	4.5	4.5	4.5	4.4
Being entertained	4.4	4.6	4.3	4.3	4.3
Seeing something new or surprising	4.2	4.4	4.3	4.0	3.9
Feeling excited	4.2	4.2	4.3	4.1	4.1
Feeling awed	3.9	4.0	4.1	3.6	3.6
Being transported elsewhere	3.8	4.1	3.8	3.5	3.6
Being intellectually challenged or stimulated	3.7	3.9	3.8	3.7	3.4
Feeling relaxed	3.5	3.6	3.5	3.5	3.4
Being spiritually uplifted	3.4	3.9	3.4	3.2	3.0

Non-Attender segments derive different benefits from their arts experiences

- Dance Curious seek entertainment, excitement, beauty and spiritual uplift from arts performances
 - ▶ They shared similar ratings with the Dance Fans and Open Minds (Dance Attender) segments
- Dance Curious also report a strong desire for intellectual challenge and transporting experiences
- Dance Blind patrons share many of these motives, though to a lesser degree than their peers
 - ▶ Art Fans and Dance Blind patrons may seek more novelty and surprise from the arts

"How much does each phrase describe either how you feel when you attend an arts performance (such as music, theater or opera) or what some of the benefits are to you of seeing performances?" Average ratings on a 5-point scale (1 = 'not at all' and 5 = 'very well'):

	Non-Attendees			
	All Non-Attendees	Dance Curious	Art Fans	Dance Blind
Seeing something beautiful	4.2	4.2	4.1	4.2
Being entertained	4.2	4.3	4.3	4.0
Feeling excited	4.0	4.1	3.9	3.8
Seeing something new or surprising	4.0	3.8	4.0	4.1
Being intellectually challenged or stimulated	3.5	3.6	3.3	3.5
Being transported elsewhere	3.6	3.8	3.5	3.5
Feeling relaxed	4.0	4.1	3.9	4.0
Feeling awed	3.6	3.8	3.7	3.1
Being spiritually uplifted	3.3	3.7	2.9	3.2

Dance Blind said they didn't enjoy dance performances and no performances appeals to them

"From this list of possible reasons for not attending dance, for each reason, tell me if that reason has applied to you in the last year." Percent responding 'yes':

	Non-Attendees			
	All Non-Attendees	Dance Curious	Art Fans	Dance Blind
I prefer other performing arts, such as music, theater or opera	68%	14%	99%	90%
Too busy or out of town too much to attend	50%	54%	58%	36%
Not aware of dance performances available	27%	47%	1%	34%
None of the dance performances appealed to me	25%	0%	0%	76%
Too much hassle getting to and from performances	23%	25%	19%	19%
The cost of the whole evening out was too much	22%	27%	22%	18%
I don't enjoy dance performances that much	18%	6%	0%	51%
I didn't enjoy last dance performance that I went to enough	10%	3%	7%	19%
For health reasons	6%	9%	5%	3%
Tickets were sold out at last performance I was interested in	5%	8%	2%	5%
I didn't feel like I understand the dance performance well enough to enjoy it	2%	1%	0%	4%

- The majority of Art Fans (and Dance Blind) said they prefer other performing arts
 - ▶ Art Fans also cited busy as a second reason for not attending dance events
 - ▶ They did not say they don't enjoy dance performances
- Dance Curious cited unawareness of events, busy schedules and cost as reasons for not attending

Among Non-Attendees, Dance Curious patrons were by far the most interested in attending dance events in the future

<i>'How interested are you in attending a professional dance performance in the future?'</i> Percent responding:	Non-Attendees			
	Total Non-Attendees	Dance Curious	Art Fans	Dance Blind
"1" Not at all Interested	6%	3%	5%	16%
"2"	15%	9%	13%	40%
"3"	28%	18%	37%	35%
"4"	25%	26%	31%	9%
"5" Very Interested	25%	43%	15%	0%

- Almost half of the Dance Curious segment said they were “very interested” in attending dance performances in the future
 - ▶ This represents a large potential addition to the ranks of the Dance Attender group
- Art Fans were more moderate in their interest in dance, with nearly half of them responding positively with a 4 or 5
 - ▶ This group, in particular, nurses a strong competing interest in other arts and cultural activities
- Dance Blind patrons were the least interested in attending dance performances

Half of current dance attenders are interested in seeing other styles of dance

<i>"How interested are you in seeing other styles of dance?"</i> Percent responding:	Dance Attenders				
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy
"1" Not at all Interested	13%	13%	13%	13%	12%
"2"	14%	12%	15%	19%	6%
"3"	23%	23%	23%	19%	29%
"4"	21%	18%	23%	19%	27%
"5" Very Interested	29%	34%	27%	27%	27%
Average Rating	3.4	3.5	3.4	3.2	3.5

- Another quarter (23%) is on the fence and may be able to be persuaded by marketing or promotional offers
- All segments show similar degrees of interest, though the Mainstreamers is slightly lower than the other segments
- These data suggest a generally strong potential for developing crossover growth across the different styles of dance

There is significant interest in attending types of dance not previously seen

"What types of professional dance performances are you interested in seeing that you have not seen before?"
Percent who are interested in seeing dance type:

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Ballet	n/a	n/a	n/a	n/a	n/a	45%	39%	55%	38%
Tap	38%	50%	38%	35%	37%	35%	37%	27%	14%
Jazz	41%	30%	33%	55%	42%	44%	43%	31%	15%
Modern or Contemporary	36%	n/a	n/a	41%	72%	43%	48%	38%	14%
Broadway musicals with dance	31%	29%	42%	47%	39%	45%	46%	30%	29%
Culturally specific dance	30%	41%	29%	27%	44%	36%	48%	25%	14%

- In the Non-Attender group, Dance Curious and Art Fans segments both showed considerable curiosity about dance types they've never seen
- Within the Dance Attenders group, there is interest across all segments in seeing new styles

Analysis of open-ended data show potential motivators are clear for current attenders

<i>"What would encourage you to attend more dance performances?"</i> Estimated strength of interest in:	Dance Attenders				Non-Attenders		
	Dance Fans	Open Minds	Main-streamers	Light & Easy	Dance Curious	Art Fans	Dance Blind
More information/advertising of performances	++	++	+	++	++	+	+
Greater variety of dance performances	+	+	+ (ballet)				
Lower ticket prices/promotions	++	++	+	++	++		
More background information on companies and works	++			+	+	+	+
More free time	++	++	++	+	++	+	
Hassle-free transit and parking	++	+		+	+		

- The desire for a greater variety of dance performances may be due to lack of awareness of current offerings
- Other requests were for more frequent child friendly performances, suburban venues, and more Latino dance

KEY:
 "+" means positive response
 "++" means strong positive response

Detailed Analysis

- Detailed segment comparisons
 - Dance attendance
 - Other cultural activity
 - Attitudes
 - Motivations
 - Benefits/barriers
 - Demographics
 - Growth potential
- Crossover dynamics
- Marketing tactics
- Awareness and attendance by segment

Gender: Our Dance Attender segments were predominantly female

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Female	71%	77%	71%	66%	63%	60%	66%	58%	49%
Male	29%	23%	29%	34%	37%	40%	34%	42%	51%

- The bias toward more active female dance audiences was clear throughout our data
- Within the Non-Attenders group:
 - ▶ Women were most strongly represented in the Dance Curious segment
 - ▶ The Dance Blind segment is actually equally male than female
- Within the Dance Attenders group, women were more likely than men to report feeling more excited, relaxed, transported and spiritually uplifted by the performances they attended than men
 - ▶ We found no benefits or motivators where men's ratings were as high as those of women
- Women were much more likely than men to say they attended dance events frequently when growing up

Gender: Our Dance Attender segments were predominantly female (cont.)

- Among Non-Attendees, women were more likely than men to report they engaged in arts experiences in order to feel relaxed and spiritually uplifted
 - ▶ There was a slight tendency for more men than women to say they wanted to feel intellectually challenged or stimulated by their arts experiences
 - ▶ Men also tended to say it was more important that they know what to expect from a performance going in
- Women were much more likely to say they wanted to see a professional dance performance in the future
 - ▶ Men were more likely to choose "I prefer other arts activities" as a reason for not attending dance
 - ▶ Men were also slightly more likely to say they hadn't enjoyed the last dance event they attended or that the performances being offered don't appeal to them
 - ▶ Women were more likely to say that ticket costs were too high and that the hassle of getting too and from performances deterred them
 - ▶ Among those who hadn't attended it, men tended to be relatively more interested in seeing jazz dance than women
- Women were more likely than men to say that they would be encouraged to attend more dance performances if:
 - ▶ a citywide dance website were created
 - ▶ more knowledge about the dancers/choreographer were provided
 - ▶ they had the opportunity to see a work in progress
 - ▶ performances were closer to where they lived
 - ▶ better and cheaper parking options were provided

Age: The average age of Dance Attenders was 56 years, compared to 59 years for Non-Attenders

- Dance Fans tended to be younger than the other three Dance Attender segments
 - ▶ Mainstreamers tended to be the oldest of the Dance Attender segments
- Nearly 30% of Open Minds are 65+
 - ▶ Corroborates findings from the qualitative research that indicate that some dance patrons are curious, inquisitive and risk-taking regardless of age
- Dance Curious were the youngest segment among Non-Attenders, then Dance Blind

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Mainstreamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Under 25	10%	16%	6%	5%	13%	5%	9%	4%	0%
25-34	10%	17%	6%	8%	5%	9%	6%	8%	17%
35-44	24%	24%	27%	14%	33%	22%	27%	18%	21%
45-54	23%	22%	29%	20%	21%	26%	27%	25%	26%
55-64	18%	14%	14%	31%	15%	22%	17%	25%	26%
65-74	14%	7%	17%	22%	13%	16%	15%	20%	10%
75 and Over	10%	16%	6%	5%	13%	5%	9%	4%	9%
Average age (in years)	56	52	57	62	53	58	55	62	57

Household Income: Dance Attenders' household income range is fairly evenly distributed

- Within the four Dance Attender segments, Mainstreamers had higher average incomes than the other segments
- Dance Fans tended to split among individuals with relatively high or low incomes
 - ▶ Additional analysis showed that in the Dance Fans segment, as income increased, the average number of dance performances attended by Dance Fans decreased
 - ▶ The Dance Fans with the highest dance attendance tend to attend smaller dance companies, where ticket prices are lower
- Light & Easies had the lowest average incomes among Dance Attenders supporting other data that suggest individuals in this segment are among the most price sensitive in the survey
- Among the Non-Attender segments, Dance Curious had the lowest incomes, while Dance Blind had the highest

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Under \$25,000	9%	11%	4%	4%	20%	5%	9%	3%	0%
\$25,000 - \$49,000	19%	22%	12%	28%	11%	25%	34%	21%	10%
\$50,000 - \$74,000	20%	14%	30%	15%	23%	20%	15%	27%	16%
\$75,000 - \$99,000	19%	16%	26%	17%	20%	21%	21%	23%	19%
\$100,000 - \$149,000	16%	16%	20%	9%	23%	11%	9%	7%	26%
\$150,000 or more	16%	21%	8%	28%	3%	17%	12%	19%	29%

Household Income: Dance Attenders' household income range is fairly evenly distributed (cont.)

- Dance Attenders with higher incomes tended to be less interested in attending new and unfamiliar types of dance
 - ▶ Also less interested in exploring culture-specific dance and less interested in exploring other cultures in general
- Higher-income respondents were no more or less likely to have attended arts or cultural institutions in the last 12 months
 - ▶ The exceptions were the Chicago Botanical Garden and Ravinia, which were more popular with higher-income respondents, probably due to these organizations' location on the North Shore
 - ▶ Ticket prices and affordable parking were far less important to those with higher incomes
 - ▶ Correspondingly, the hassles of getting to and from performances were cited less often by wealthier patrons as barriers to dance attendance
- The higher the respondent's household income, the less likely he or she was to be aware of the medium or smaller dance companies (including Hedwig, Muntu, Joel Hall, River North and Culture Shock) and certain venues (Link's Hall, Dance Center at Columbia College)

Residence: The majority of Dance Attenders and Non-Attenders live in the city

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Chicago	63%	62%	61%	65%	67%	64%	68%	57%	69%
North Suburbs	20%	24%	17%	21%	18%	17%	13%	19%	24%
West Suburbs	11%	11%	13%	10%	10%	10%	8%	13%	5%
Northwest Suburbs	4%	2%	9%	3%	4%	6%	5%	8%	2%
South Suburbs or Indiana	1%	1%	1%	2%	0%	4%	6%	3%	0%

- Residence geography can be a barrier to dance and arts attendance, but it's not as strong as other factors
- Suburban patrons were slightly less likely than city dwellers to have attended most types of arts and cultural activities
 - ▶ Except for science museums and botanic gardens, which they were more likely to have attended
 - ▶ May be driven by proximity to these attractions (Chicago Botanic Garden, MSI)
- Please note that our respondent base may contain a greater proportion of city residents than the actual public would suggest, due to the majority of the dance and cultural lists being from organizations located in the city

Children: Few Dance Attenders or Non-Attenders have children living at home with them

- Having children at home is not necessarily a major barrier to dance attendance for our respondents
 - ▶ Two of the segments most interested in dance, including the one whose members attended the most dance performance (Dance Fans), were also the most likely to have school-aged children at home
 - ▶ Individuals in the Dance Curious segment may face more obstacles in attending performances due to family commitments
 - ▶ Respondents with children under 18 were slightly more likely to cite “too busy” as a reason for not attending dance events

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Children under 18 at home	22%	26%	21%	18%	21%	22%	23%	15%	24%
No children under 18 at home	78%	74%	79%	82%	79%	78%	77%	85%	76%

- Please note that survey respondents typically skew older, so that the actual dance and cultural attendee population is likely to be slightly younger, and thus slightly more likely to have children at home than these data suggest

Sexual Orientation: GLBT patrons were a small minority of our respondents

- GLBT respondents made up 6% of our Dance Attendee sample and 4% of our Non-Attendee sample
- GLBT respondents who have not attended dance events this year were less interested than others in attending a dance performance in the future
 - ▶ More likely to say they don't enjoy dance events, the performances didn't appeal to them, and that they preferred other types of arts activities
- Likewise, GLBT respondents who have attended dance events in the last year are more interested than others in seeing different types of dance in the future
- GLBT respondents appear more likely to have firm opinions about whether they enjoy and want to attend dance events than their straight peers
 - ▶ Those who do enjoy dance tend to be strong enthusiasts; those who don't seem less open to change in their opinion

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Heterosexual	88%	89%	93%	86%	82%	91%	92%	92%	86%
Gay, Lesbian, Bisexual	6%	4%	4%	8%	8%	4%	3%	3%	9%
Refused	6%	7%	3%	6%	10%	5%	5%	5%	5%

Sexual Orientation: GLBT patrons were a small minority of our respondents (cont.)

- GLBT patrons who are Dance Attenders tend to be more motivated than others by the excitement of the performances, experiencing beauty, and being transported
 - ▶ They were much less likely to say that feeling a sense of spiritual uplift was important reason they attended performances
- GLBT patrons were more likely than other patrons to have attended opera, theater, and dance events in the last 12 months
 - ▶ also more likely than other Dance Attenders to have attended ballet in the last 12 months, and less likely to have attend tap
 - ▶ less likely to have attended a science museum
- For the arts in general, GLBT respondents were more likely to be interested in avant garde performances
 - ▶ They may also be slightly more focused on understanding the meaning of the work

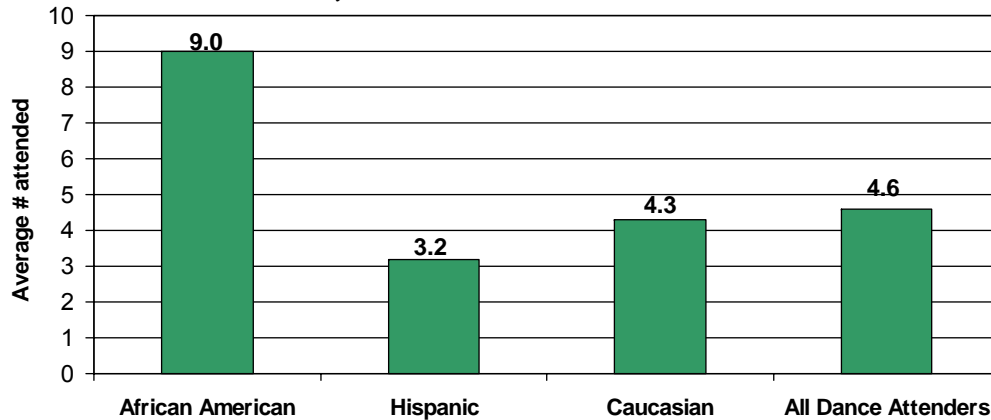
Ethnicity: Analysis suggests strong growth potential among both African-American and Hispanic audiences

- African-Americans in the Dance Attenders group were disproportionately likely to be Dance Fans
 - ▶ African-Americans in this group attended more performances on average than individuals from any other ethnic background
- Both African-Americans and Hispanics in the Non-Attenders group were disproportionately likely to be Dance Curious
 - ▶ They were more interested than Caucasians attending a dance performance in the future

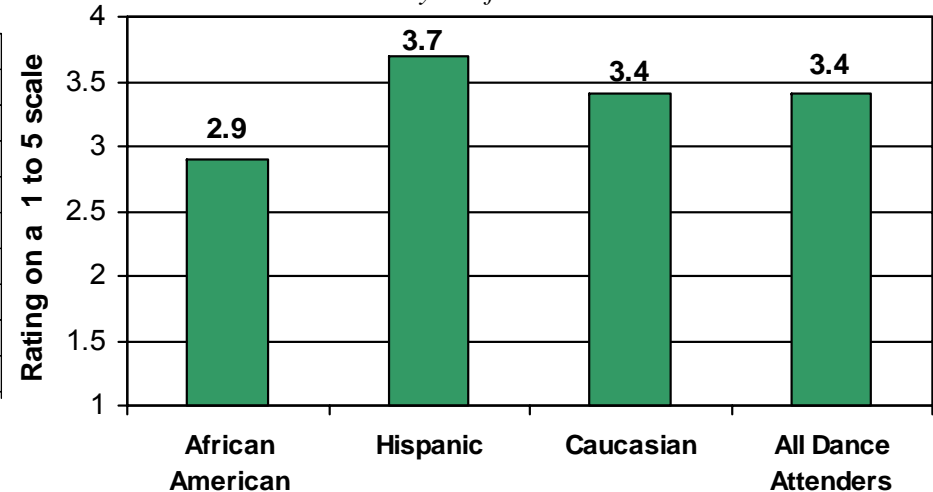
	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
White/Caucasian	77%	69%	82%	87%	71%	72%	56%	83%	91%
African-American	7%	12%	4%	2%	8%	17%	25%	13%	7%
Latino/Hispanic	12%	12%	13%	3%	20%	9%	20%	1%	2%
Asian-American	2%	1%	0%	2%	0%	1%	1%	0%	0%
Other	1%	1%	0%	3%	0%	1%	0%	2%	0%
Refused	2%	2%	1%	3%	0%	0%	0%	1%	0%

Ethnicity: Current dance attendance varied dramatically by the respondents' ethnic background

Dance Attenders Only: "How many professional dance performances have you attended in the last 12 months?"

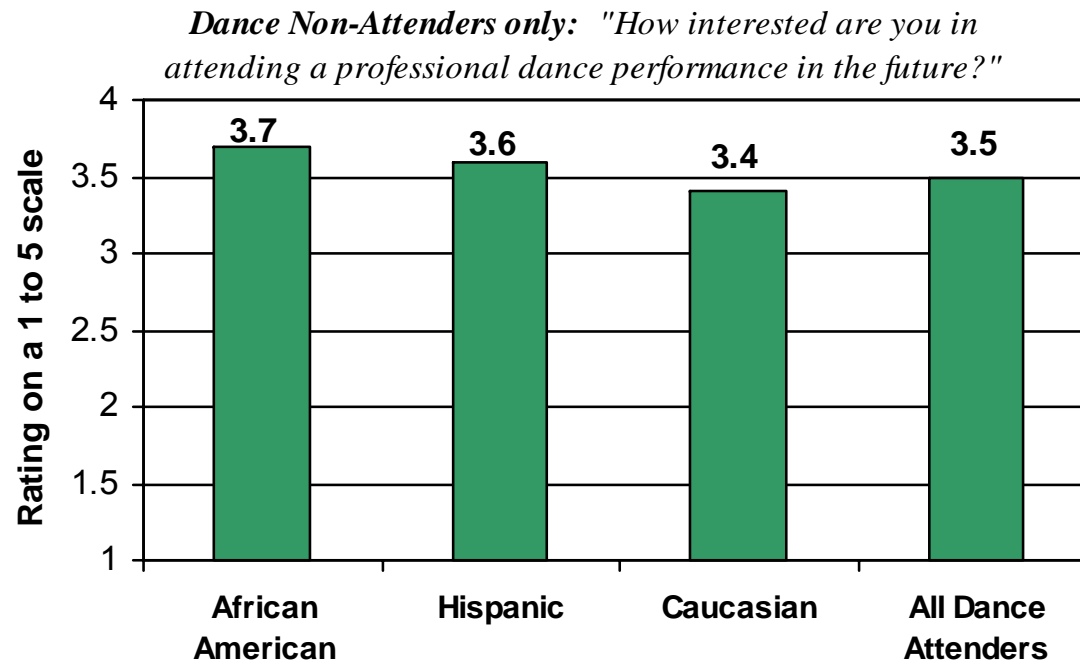


Dance Attenders only: "How interested are you in seeing other styles of dance?"



- African Americans are much more likely than others to be heavy dance attenders
 - ▶ However, they are also least likely to be interested in seeing new types of dance
- Hispanic Dance Attenders had attended fewer dance events on average than individuals from other backgrounds
 - ▶ But, they are the most interested in seeing new types of dance

Ethnicity: Among non-attenders Both African-Americans and Hispanics expressed greater interest than Caucasians in attending dance



- Both these findings and those on the previous page indicate a strong potential for developing greater dance attendance among the African-American and Hispanic audiences
 - ▶ Caveat: Hispanic individuals tend to give higher ratings on average in surveys, so these figures may be artificially higher than their interest truly indicates

Ethnicity: African-American respondent profile highlights

- African-Americans respondents:
 - ▶ attended culture-specific dance performances at much higher rates than whites
 - Otherwise, they were similar to other ethnic groups in the types of dance they attended
 - ▶ were more likely to have attended dance performances growing up
 - ▶ gave special weight to a desire to feel spiritually uplifted, relaxed, and entertained when they attend dance
 - ▶ are more likely to cite ticket prices as an important factor in their attendance decisions across the arts
 - ▶ are more likely than others to say they want to know what to expect when they attend the event
 - ▶ are more likely to say performances should be fun and entertaining
 - ▶ are more interested in performances from other cultures
 - ▶ are more interested than others in seeing works that they hadn't seen before, in knowing the titles of the works to be performed, in availability of convenient parking, and in having good seats
- However, African Americans in the Dance Attenders group were less likely to be interested in exploring different, unfamiliar types of dance
- African American audiences might be induced to attend more dance by several changes
 - ▶ Offering social events before performances
 - ▶ Offering affordable parking
 - ▶ offering lower ticket prices
 - ▶ providing the opportunity to see a work in progress

Ethnicity: Hispanic respondent profile highlights

- In their motives for attending dance performances, Hispanic individuals were more likely than Caucasians to say they were looking for experiences that would be relaxing, intellectually stimulating, and spiritually uplifting
 - ▶ They were less focused on seeking experiences of “beauty” and “awe”
 - ▶ This is in keeping with the relatively low Hispanic representation in the Mainstreamer segment – which tended to be the most classical and aesthetically focused segment
- As with African-American patrons, Hispanic dance patrons cited ticket prices as a very important factor in their arts attendance decisions
 - ▶ Hispanic patrons were the most likely to say that lower ticket prices would encourage them to attend more dance events than any other group
 - ▶ Hispanic patrons were also the most likely to say that having someone to go with was an important consideration in their attendance decisions
- They were less focused than African-American patrons on wanting to see performances that would be new and surprising, or to see a work they had never seen before
 - ▶ Hispanic patrons were the most likely to say that a newspaper review of a performance would influence their attendance decision
 - ▶ They were the group most likely to say that social events tied-in with performances would encourage them to attend
 - ▶ Like African-American patrons, they were very interested in seeing performances from different cultures, and they were the group most interested in avant-garde or cutting edge performances

Ethnicity: Hispanic respondent profile highlights (cont.)

- Hispanic Non-Attendees were the most likely of all non attending groups to say that having lower ticket prices, more information about events, and greater convenience of access would make them attend more dance events
- Overall this group expressed the most interest of any non-attending group in wanting to attend dance events
 - ▶ Not even one individual from the Hispanic Non Attender group gave “I don’t enjoy dance performances” as a reason that they haven’t attended
- Overall, the potential for growth in this the Hispanic non attending segment appears very strong
- However, it may be a challenge to attract large numbers of these Dance Curious Hispanics to actual concerts because of constraints on their time and money
 - ▶ Their average annual income was lower than other survey groups
 - ▶ Almost 90% of our Hispanic respondents said they have children under 18 living with them, as this was a fairly young group interviewed
 - This is a vastly higher proportion than for any other ethnic group in our survey
 - ▶ These demographic factors may exert a very strong influence on these patrons’ arts attendance and behaviors
 - We see that rates of attendance for Hispanic respondents at other forms of cultural / arts events were lower than among other groups

Detailed Analysis

- Detailed segment comparisons
 - Dance attendance
 - Other cultural activity
 - Attitudes
 - Motivations
 - Benefits/barriers
 - Demographics
 - Growth potential
- Crossover dynamics
- Marketing tactics
- Awareness and attendance by segment

Considerable audience crossover is already occurring between dance forms

		Among patrons who attended at least one performance of ... in the last 12 months,					
		Ballet	Tap	Jazz	Modern or contemporary	Broadway musicals w/dance	Culturally specific dance
...percent who also attended:	Ballet		74%	72%	68%	78%	67%
	Tap	26%		47%	31%	32%	27%
	Jazz	36%	67%		49%	46%	44%
	Modern or Contemporary	56%	71%	80%		61%	68%
	Broadway Musicals	46%	53%	55%	44%		41%
	Culturally Specific Dance	52%	58%	68%	64%	54%	

- If a respondent had attended any of the other five styles of dance in the last 12 months, there was at least a 70% chance they had also attended ballet
- If a patron had attended a jazz dance performance, there was an 80% chance they also attended a modern dance performance

Crossover is strong between certain dance forms and certain other cultural activities: Dance Attenders

KEY:

"++" means much more likely than average

"+" means more likely than average

"o" means average likelihood

"-" means less likely than average

"--" means much less likely than average

		Among patrons who attended at least one performance of ... in the last 12 months,					
		Ballet	Tap	Jazz	Modern or contemporary	Broadway musicals w/dance	Culture-specific dance
...percent who also attended:	Art museum	+	o	o	+	o	o
	Art gallery	o	o	++	o	o	+
	Professional opera performance	++	--	--	--	o	--
	Professional music performance	+	-	-	o	-	-
	Professional theater performance	+	o	+	o	+	--
	Science or nature museum	o	o	o	o	-	o
	History museum	o	o	++	+	+	o
	Zoo	+	o	+	+	o	o
	Botanic garden or nature center	o	o	+	o	-	-

- Ballet attendance is strongly associated with opera-going
- Dance Attenders who saw jazz dance performances tended to visit art galleries and history museums more frequently than those who didn't attend this types of dance

Crossover is strong between certain dance forms and certain other cultural activities: Non-Attendees

- Non-Attendees who have seen a ballet performance at any time in the past are more likely to have attended opera, music, and theater performances within the last 12 months

KEY:

- "++" means much more likely than average
- "+" means more likely than average
- "o" means average likelihood
- "-" means less likely than average
- "--" means much less likely than average

		Among patrons who ever attended a performance of this type					
		Ballet	Tap	Jazz	Modern or contemporary	Broadway musicals w/dance	Culture-specific dance
...percent who also attended in past year:	Art museum	++	+	o	+	o	o
	Art gallery	+	+	+	+	o	o
	Professional opera performance	+	--	--	o	o	-
	Professional music performance	+	-	-	+	+	o
	Professional theater performance	++	+	o	++	++	-
	Science or nature museum	+	o	o	-	-	o
	History museum	o	+	++	o	o	o
	Zoo	o	o	+	-	+	o
	Botanic garden or nature center	+	o	++	++	++	o

Crossover with specific museums did not vary much by type of dance

% who also attended these museums:	Among patrons who attended this form of dance last year...					
	Ballet	Tap	Jazz	Modern / contemporary	Broadway musicals w/dance	Culturally specific dance
Art Institute of Chicago	70	70	70	69	77	64
Field Museum	55	48	53	55	49	50
Museum Science and Industry	36	42	34	39	32	35
Museum of Contemporary Art	33	29	38	38	43	38
Chicago Historical Society	19	20	20	21	14	19
Adler Planetarium	18	20	19	18	18	16
Nature Museum	14	15	18	16	9	16
Terra Museum of American Art	12	6	13	13	16	15
Mexican Fine Arts Museum	12	6	12	13	12	15
Chicago Cultural Center	6	3	7	5	7	8
DuSable Museum	5	4	4	6	3	5
Chicago Children's Museum	4	7	5	4	5	5
Kohl Children's Museum	1	3	1	1	3	1

- Example: 77% of individuals who had attended a Broadway musical with dance this year had also visited the Art Institute

There were slightly larger differences when it came to crossover with music organizations

% who also attended these music performances:	Among patrons who attended this form of dance last year:					
	Ballet	Tap	Jazz	Modern / contemporary	Broadway musicals w/dance	Culturally specific dance
Chicago Symphony Orchestra	43	33	33	40	51	33
Lyric Opera	32	17	20	23	33	20
Chicago Sinfonietta	23	17	17	15	18	14
Ravinia	19	20	19	22	19	20
Chicago Chamber Musicians	11	7	11	12	10	8
Pick Staiger Concert Hall	10	13	10	10	8	9
Music of the Baroque	8	7	4	8	5	5
Chicago Opera Theater	9	7	8	6	6	6
Old Town School of Folk Music	6	16	14	8	8	13
Jazz at Symphony Center	6	3	3	4	6	5
South Shore Cultural Center	2	6	4	1	1	3
Latino Cultural Center	3	4	4	4	2	3
Elgin Symphony	1	1	2	1	0	1
Harris Theater Music & Dance	1	0	0	1	0	1

- Ballet and Musical patrons were more likely to have attended a CSO concert or operatic concert
- Tap and Jazz patrons were much more likely than other Dance Attenders to have been to a concert the Old Town School of Folk Music

A few differences in crossover with theater emerged among the dance types

% who also attended these theaters:	Among patrons who attended this form of dance last year...					
	Ballet	Tap	Jazz	Modern / contemporary	Broadway musicals w/dance	Culturally specific dance
The Goodman Theater	37	30	33	35	40	33
Steppenwolf Theater	28	15	33	26	25	22
Chicago Shakespeare Theater	26	29	21	22	28	18
The Court Theater	14	13	10	16	14	13
Victory Gardens Theater	11	6	9	9	14	11
The Writer's Theater	8	5	7	6	5	4
Lookingglass Theater	4	6	6	5	4	5
Redmoon Theater	2	3	2	2	3	2
Latino Chicago Theater	1	1	1	2	0	3
Black Ensemble Theater	0	0	0	0	0	0

- Jazz dance audiences attended the Steppenwolf Theater at far higher rates than their peers
- Fans of Broadway musicals w/dance were more likely than others to be found at the Goodman or Victory Garden theaters

For the Non-Attender group, there's real potential for crossover with musical organizations

"How interested are you in seeing a professional dance performance in the future?"

Average ratings on a 1 to 5 scale:

	Non-Attendees
Latino Cultural Center	3.8
Chicago Symphony Orchestra	3.6
Chicago Chamber Musicians	3.6
Lyric Opera	3.5
Music of the Baroque	3.5
Jazz at Symphony Center	3.5
Elgin Symphony	3.3
Harris Theater Music & Dance	3.3
Pick Staiger Concert Hall	3.2
Ravinia	3.2
Chicago Opera Theater	3.1
South Shore Cultural Center	2.9
Chicago Sinfonietta	n/a

- The small set of Non-Attendees who frequented the Latino Cultural Center expressed the greatest interest in attending dance performances
- Respondents who attended the CSO and other classical music ensembles reported the second highest interest in seeing a dance performance in the future
 - ▶ Interest may be focused on ballet for many of these patrons
- Marketing of dance through partnerships with musical ensembles and venues could be very successful

Detailed Analysis

- Detailed segment comparisons
 - Dance attendance
 - Other cultural activity
 - Attitudes
 - Motivations
 - Benefits/barriers
 - Demographics
 - Growth potential
- Crossover dynamics
- Marketing tactics
- Awareness and attendance by segment

Researching potential marketing tactics

- In the qualitative research last fall, we tested eight tactical concepts to increase dance attendance and got a wealth of information on likes/dislikes, suggestions for improvements, etc. They rated as follows, from high interest to low:
 1. A city-wide dance Web site
 2. Background information
 3. A 'dance sampler' evening
 4. Collaboration with other art forms
 5. Dance Pass
 6. Venue as part of the experience
 7. Work in progress
 8. A social event before the performance
- We included many of these items in the survey to be able to compare interest levels between Dance Attenders and Non-Attenders, as well as between segments
- One caveat for using a survey to gauge interest in new concepts, however, is that we don't get much insight into why respondents' interest level
 - ▶ So, in developing any of these tactics further, we recommend relying primarily on the qualitative research, with support from the quantitative research

Encouraging dance attendance will need to be a multi-pronged effort; there is no "silver bullet"

- A centralized dance website had moderate interest; lower than expected perhaps due to potential age skew
 - ▶ Won interest more from current dance audiences than Non-Attenders
 - ▶ Among Non-Attenders, the Dance Curious segment was most interested
- Making more information about dancers and companies available might influence all four segments of Dance Attenders to attend more frequently
 - ▶ Open Minds may be the most encouraged by this innovation

"How much would each of the following possibilities encourage you to attend dance performances in the future?"

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
<i>A centralized city-wide dance web site with information on upcoming performances in the Chicago area?</i>									
A lot more	26%	23%	31%	25%	22%	16%	22%	17%	0%
Somewhat more	40%	42%	32%	44%	44%	36%	44%	29%	30%
No more	34%	35%	37%	31%	33%	48%	34%	54%	70%
<i>Knowing more about the dancers, choreographer, or dance company?</i>									
A lot more	19%	23%	22%	17%	11%	19%	23%	19%	7%
Somewhat more	57%	46%	65%	61%	62%	43%	42%	45%	44%
No more	24%	31%	14%	22%	27%	38%	35%	36%	49%

Social events before or after performances would have only a limited appeal for most segments

- Relatively few respondents are excited about seeing works in progress
 - ▶ Dance Fans are more interested in this option than other segments
 - ▶ Might be a good reward to offer with subscription packages for patrons who are already frequent dance attenders

<i>"How much would each of the following possibilities encourage you to attend dance performances in the future?"</i>	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
<i>'Being able to see a work in progress, such as a new piece, before it is performed for the general public?'</i>									
'A lot more'	21%	29%	20%	12%	18%	13%	20%	8%	5%
'Somewhat more'	37%	31%	42%	38%	39%	31%	40%	27%	14%
'No more'	43%	40%	38%	50%	43%	56%	40%	65%	81%
<i>'Having a social event before or after the performance that all ticket holders could attend?'</i>									
'A lot more'	12%	9%	9%	7%	28%	9%	16%	4%	2%
'Somewhat more'	27%	40%	29%	12%	23%	27%	36%	22%	16%
'No more'	61%	52%	62%	81%	49%	64%	48%	74%	81%

Additional background information and greater convenience would reduce barriers for some Non-Attendees

- Background information on pieces being performed would be particularly helpful to the Dance Curious segment
- Convenience of location is an important factor for the two target Non-Attender segments

<i>'How much would each of the following possibilities encourage you to attend dance performances in the future?'</i>	Non-Attendees			
	Total Non-Attendees	Dance Curious	Art Fans	Dance Blind
<i>'Having background information on each piece being performed?'</i>				
'A lot more'	22%	27%	21%	12%
'Somewhat more'	40%	45%	37%	33%
'No more'	38%	28%	42%	56%
<i>'Having performances close to where you live?'</i>				
'A lot more'	40%	50%	40%	14%
'Somewhat more'	29%	24%	34%	33%
'No more'	30%	26%	26%	53%

For the Dance Curious, the practical details of parking availability and parking cost loom large

- These extrinsic factors can discourage new patrons from giving dance a try
- If convenient, affordable (discounted?) parking is available, that fact should be well communicated to these potential patrons

<i>'How much would each of the following possibilities encourage you to attend dance performances in the future?'</i>	Non-Attendees			
	Total Non-Attendees	Dance Curious	Art Fans	Dance Blind
<i>'Having easy parking options?'</i>				
'A lot more'	37%	43%	40%	16%
'Somewhat more'	29%	31%	30%	21%
'No more'	34%	26%	30%	63%
<i>'Having affordable parking options?'</i>				
'A lot more'	42%	53%	40%	21%
'Somewhat more'	26%	25%	29%	19%
'No more'	32%	23%	31%	60%

Those most curious about dance are also most sensitive to ticket prices, so discounting may be helpful

- Dance Curious patrons skew a little younger than others and may have less disposable income
- Incentives and promotions may encourage these individuals to attend
- Surprisingly, having someone to attend with is by far the strongest factor that could motivate Dance Blind patrons to attend a dance event

<i>'How much would each of the following possibilities encourage you to attend dance performances in the future?'</i>	Non-Attendees			
	Total Non-Attendees	Dance Curious	Art Fans	Dance Blind
<i>'Lower ticket prices?'</i>				
<i>'A lot more'</i>	38%	45%	38%	14%
<i>'Somewhat more'</i>	34%	34%	35%	29%
<i>'No more'</i>	29%	21%	26%	57%
<i>'Having someone to go with who enjoys dance?'</i>				
<i>'A lot more'</i>	39%	37%	40%	42%
<i>'Somewhat more'</i>	28%	28%	27%	30%
<i>'No more'</i>	33%	35%	32%	28%

Most Dance Attendees purchase their tickets more than two weeks in advance

- Mainstreamers like to buy ahead
- Dance Fans are the most likely to purchase tickets last-minute

'How far in advance of the performance date do you typically purchase your tickets?' Percent responding in category:

	Dance Attenders				
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy
'Two or more weeks in advance'	64%	59%	68%	68%	63%
'One to two weeks in advance''	22%	21%	24%	21%	24%
'Less than a week in advance'	14%	20%	8%	11%	12%

Detailed Analysis

- Detailed segment comparisons
 - Dance attendance
 - Other cultural activity
 - Attitudes
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 - Demographics
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- Marketing tactics
- Awareness and attendance by segment

Unaided awareness of specific dance companies

'When you think of dance companies located in the greater Chicago area, which companies come to mind?'

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Joffrey Ballet	68%	60%	65%	84%	65%	56%	40%	75%	58%
Hubbard Street Dance	67%	70%	65%	68%	61%	54%	44%	60%	65%
River North Dance	18%	23%	23%	13%	10%	3%	4%	3%	2%
Gus Giordano Jazz	18%	23%	18%	15%	12%	6%	8%	5%	5%
Melissa Thodos Dancers	10%	16%	6%	3%	14%	6%	8%	8%	2%
Luna Negra Dance	9%	12%	11%	3%	8%	2%	3%	2%	0%
Muntu Dance Theater	9%	17%	11%	0%	4%	5%	6%	5%	2%
Chicago Human Rhythm	8%	12%	2%	10%	6%	2%	3%	1%	0%
Joel Hall Dancers	8%	17%	7%	2%	4%	2%	3%	2%	0%
Trinity Irish Dance	8%	11%	4%	6%	8%	3%	4%	3%	2%

Unaided awareness of specific dance companies (cont.)

'When you think of dance companies located in the greater Chicago area, which companies come to mind?'

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Hedwig Dance	8%	9%	9%	7%	6%	0%	0%	1%	0%
Ballet Chicago	7%	8%	3%	7%	12%	7%	9%	10%	3%
Salt Creek Ballet	4%	4%	6%	2%	2%	1%	2%	1%	0%
Momenta	3%	6%	4%	2%	0%	0%	1%	0%	0%
Ensemble Espanol	3%	3%	3%	3%	4%	0%	1%	0%	0%
Lucky Plush Productions	3%	6%	3%	0%	4%	0%	1%	0%	0%
Madd Rhythms	3%	6%	1%	0%	2%	0%	0%	0%	0%
Lira Ensemble	3%	6%	1%	0%	2%	1%	0%	1%	0%
Natya Dance Theater	2%	5%	1%	0%	2%	1%	3%	0%	0%
Culture Shock Chicago	1%	2%	8%	0%	2%	1%	1%	0%	0%

Aided awareness of specific dance companies

Have you ever heard of these companies?

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Joffrey Ballet	96%	98%	96%	95%	94%	89%	80%	98%	95%
Hubbard Street Dance	93%	97%	94%	97%	84%	89%	80%	97%	93%
River North Dance	57%	71%	56%	47%	47%	41%	45%	42%	28%
Gus Giordano Jazz	58%	71%	54%	61%	33%	36%	36%	42%	21%
Melissa Thodos Dancers	40%	54%	35%	29%	35%	15%	18%	11%	14%
Luna Negra Dance	52%	59%	37%	24%	41%	20%	21%	15%	22%
Muntu Dance Theater	41%	59%	42%	24%	25%	22%	27%	19%	17%
Chicago Human Rhythm	33%	53%	21%	23%	26%	11%	17%	8%	5%
Joel Hall Dancers	53%	61%	44%	31%	25%	26%	20%	37%	19%
Trinity Irish Dance	58%	70%	56%	47%	49%	43%	37%	56%	30%

Aided awareness of specific dance companies (cont.)

Have you ever heard of these companies?

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Hedwig Dance	34%	43%	34%	31%	24%	9%	12%	8%	2%
Ballet Chicago	62%	72%	53%	64%	51%	47%	47%	51%	35%
Salt Creek Ballet	22%	23%	21%	26%	18%	12%	12%	14%	7%
Momenta	14%	23%	10%	10%	8%	7%	11%	6%	2%
Ensemble Espanol	41%	50%	38%	39%	33%	17%	17%	21%	7%
Lucky Plush Productions	14%	22%	17%	5%	8%	3%	3%	4%	0%
Madd Rhythms	14%	29%	7%	8%	6%	4%	5%	5%	0%
Lira Ensemble	11%	17%	7%	5%	10%	9%	9%	8%	12%
Natya Dance Theater	11%	21%	7%	5%	8%	4%	5%	5%	0%
Culture Shock Chicago	18%	33%	13%	5%	16%	7%	8%	10%	0%

Attendance at specific companies

Have you attended a performance by each company? Percent responding 'yes':

	Ever Attended?					Attended in the last 12 months?				
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy
Joffrey Ballet	81%	87%	70%	92%	69%	53%	53%	41%	68%	51%
Hubbard Street Dance	74%	78%	82%	76%	55%	45%	56%	48%	41%	27%
Gus Giordano Jazz	31%	46%	28%	29%	13%	17%	34%	14%	7%	4%
River North Dance	27%	50%	21%	31%	11%	13%	28%	7%	8%	0%
Ballet Chicago	25%	35%	11%	29%	18%	8%	16%	3%	5%	4%
Trinity Irish Dance	24%	35%	18%	24%	10%	8%	18%	6%	2%	4%
Melissa Thodos Dancers	23%	40%	10%	16%	18%	10%	21%	3%	6%	6%
Joel Hall Dancers	21%	36%	14%	16%	6%	8%	20%	4%	0%	0%
Muntu Dance Theater	19%	34%	11%	10%	14%	7%	17%	6%	0%	2%
Chicago Human Rhythm	18%	31%	11%	13%	10%	7%	17%	3%	3%	2%

Attendance at specific companies (cont.)

Have you attended a performance by each company? Percent responding 'yes':

	Ever Attended?					Attended in the last 12 months?				
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy
Luna Negra Dance	16%	26%	14%	5%	12%	8%	11%	10%	5%	6%
Ensemble Espanol	15%	32%	13%	3%	4%	7%	17%	3%	2%	0%
Hedwig Dance	12%	15%	10%	8%	14%	5%	8%	7%	2%	2%
Culture Shock Chicago	7%	18%	3%	0%	0%	4%	12%	1%	0%	0%
Madd Rhythms	7%	19%	0%	3%	0%	4%	11%	0%	0%	0%
Momenta	6%	11%	3%	3%	4%	2%	2%	1%	2%	2%
Salt Creek Ballet	6%	9%	4%	3%	6%	2%	2%	3%	0%	2%
Natya Dance Theater	4%	10%	1%	2%	0%	1%	3%	0%	0%	0%
Lucky Plush Productions	4%	5%	4%	0%	2%	2%	2%	3%	0%	0%
Lira Ensemble	3%	5%	3%	0%	0%	1%	2%	0%	0%	0%

Aided awareness of presenting organizations

'Tell me whether you have heard of each organization' Percent responding 'yes':

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Chicago Theater	93%	97%	96%	86%	92%	90%	89%	88%	95%
The Auditorium Theater	90%	93%	87%	94%	84%	90%	85%	95%	91%
Dance Center at Columbia College	77%	85%	86%	65%	65%	58%	58%	64%	42%
Centre East	70%	70%	68%	81%	54%	66%	61%	73%	65%
Dance Chicago at the Athenaeum	69%	76%	62%	75%	66%	55%	52%	66%	40%
The Harris Theater	56%	56%	59%	58%	46%	41%	43%	45%	30%
Museum of Contemporary Art	55%	58%	49%	66%	43%	46%	42%	50%	51%
Governors State University	51%	55%	58%	52%	35%	47%	49%	50%	37%
McAninch Arts Center	38%	46%	38%	32%	31%	33%	31%	39%	26%
Link's Hall	30%	44%	30%	16%	25%	20%	15%	25%	21%

Dance Attender rates of attendance at presenting organizations

Have you attended a performance at this organization? Percent responding 'yes':

	Attended Ever					Attended last 12 months				
	Total	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total	Dance Fans	Open Minds	Main-streamers	Light & Easy
The Auditorium Theater	81%	82%	80%	85%	71%	50%	50%	39%	68%	43%
Chicago Theater	73%	77%	73%	74%	65%	25%	41%	23%	13%	16%
Centre East	47%	46%	55%	55%	26%	25%	29%	27%	29%	8%
Dance Chicago at the Athenaeum	42%	56%	36%	37%	31%	21%	37%	17%	10%	8%
Dance Center at Columbia College	40%	58%	45%	24%	20%	20%	41%	17%	3%	6%
The Harris Theater	31%	33%	35%	32%	18%	22%	24%	27%	19%	14%
Museum of Contemporary Art	28%	37%	25%	26%	18%	14%	22%	13%	7%	8%
Link's Hall	18%	24%	24%	8%	10%	7%	11%	7%	5%	2%
McAninch Arts Center	15%	16%	23%	10%	8%	5%	7%	7%	2%	4%
Governors State University	11%	13%	14%	4%	8%	4%	1%	11%	3%	2%
Others	6%	7%	4%	13%	2%	3%	2%	3%	4%	2%

Attendance at specific museums in last 12 months

'Which Chicago area museums have you visited in the last 12 months?' Percent attending each institution:

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Art Institute of Chicago	69%	70%	68%	76%	62%	66%	51%	80%	74%
Field Museum	55%	52%	59%	63%	47%	53%	47%	56%	61%
Museum Science and Industry	36%	34%	41%	40%	29%	35%	35%	35%	37%
Museum of Contemporary Art	33%	33%	38%	27%	31%	28%	23%	35%	28%
Adler Planetarium	17%	21%	14%	19%	10%	14%	18%	12%	9%
Chicago Historical Society	16%	23%	21%	10%	6%	23%	26%	23%	14%
Nature Museum	15%	14%	21%	16%	6%	10%	13%	8%	7%
Terra Museum of American Art	12%	14%	14%	5%	17%	14%	9%	17%	18%
Mexican Fine Arts Museum	12%	12%	13%	6%	20%	9%	13%	8%	2%
Chicago Cultural Center	6%	7%	4%	7%	6%	9%	7%	12%	7%
Chicago Children's Museum	5%	7%	3%	3%	6%	6%	13%	1%	0%
DuSable Museum	4%	6%	7%	3%	0%	9%	12%	7%	5%
Kohl Children's Museum	2%	2%	0%	0%	4%	2%	3%	1%	0%

Attendance at specific music organizations/venues in last 12 months

‘What concerts or musical performances have you attended in the Chicago area in the last 12 months?’ Percent attending a performance at:

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
Chicago Symphony Orchestra	42%	36%	42%	57%	31%	35%	24%	45%	44%
Lyric Opera	28%	18%	24%	48%	27%	27%	19%	37%	28%
Chicago Sinfonietta	19%	17%	14%	30%	16%	8%	3%	15%	3%
Ravinia	19%	21%	28%	11%	14%	18%	13%	25%	16%
Chicago Chamber Musicians	10%	10%	13%	16%	0%	9%	10%	8%	9%
Pick Staiger Concert Hall	9%	12%	10%	8%	6%	7%	5%	12%	2%
Old Town School of Folk Music	8%	14%	6%	0%	12%	5%	3%	9%	5%
Music of the Baroque	8%	4%	13%	10%	4%	11%	4%	13%	10%
Chicago Opera Theater	7%	9%	3%	11%	4%	8%	5%	9%	14%
Jazz at Symphony Center	3%	3%	4%	13%	4%	6%	7%	7%	0%
South Shore Cultural Center	2%	4%	0%	2%	0%	6%	7%	7%	2%
Latino Cultural Center	2%	6%	1%	0%	0%	2%	3%	2%	2%
Elgin Symphony	1%	1%	1%	0%	0%	3%	7%	1%	0%
Harris Theater Music & Dance	1%	0%	1%	0%	2%	3%	3%	6%	0%

Attendance at specific theaters in last 12 months

'What Chicago area theaters have you attended a play at in the last 12 months?'
Percent attending a performance at:

	Dance Attenders					Non-Attenders			
	Total Dance	Dance Fans	Open Minds	Main-streamers	Light & Easy	Total Non-Attenders	Dance Curious	Art Fans	Dance Blind
The Goodman Theater	37%	34%	35%	40%	39%	39%	39%	38%	42%
Steppenwolf Theater	26%	20%	32%	32%	25%	22%	12%	32%	26%
Chicago Shakespeare Theater	24%	25%	18%	35%	16%	25%	13%	30%	37%
The Court Theater	14%	12%	18%	14%	12%	19%	18%	19%	23%
Victory Gardens Theater	11%	6%	11%	14%	18%	14%	17%	11%	12%
The Writer's Theater	7%	4%	9%	8%	8%	3%	3%	3%	2%
Lookingglass Theater	4%	7%	3%	2%	4%	12%	9%	16%	9%
Redmoon Theater	2%	2%	1%	2%	0%	1%	2%	0%	2%
Latino Chicago Theater	2%	1%	4%	0%	2%	4%	6%	2%	5%
Black Ensemble Theater	0%	0%	0%	0%	0%	3%	3%	3%	0%
Other Theater	55%	70%	47%	58%	51%	49%	47%	46%	53%

Appendix

Questionnaires for Dance Attendees and Non-Attendees