

## Results of a multi-site study of audiences across Australia:

### Towards a New Model for Audience Research

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# Overview of Today's Session

- What is the CultureLab Research Community?
- How did the pilot study work?
- What does the dashboard look like?
- What were some of the most interesting results?
- What might the future hold?
- Q & A

# What is the CultureLab Research Community?

- A multi-site opt-in research program to bring high quality audience insight to the arts sector at a very low cost
  - WolfBrown created the CultureLab Research Community (CRC) to disrupt the system of privileged access to professional quality market research among non profit arts organisations.
  - Drawing from the principles of crowdsourcing, crowdfunding and peer learning, CRC aims to drastically drive down the cost of market research and drive up the breadth and quality of field learning internationally.

# Cohort Studies are the Future of Audience Research

- A study of the audience impact of 136 different choral music concerts presented by 23 choruses, commissioned by Chorus America (n=15,133)
- A study of attitudes about new theatrical works among single-ticket buyers to 32 theatre companies in the National New Play Network (n=7,200)
- A study of the digital media habits of performing arts ticket buyers to 58 organizations, in partnership with Capacity Interactive (n=27,000)
- A study of key audience characteristics for 39 Australian arts organization, in partnership with PAC Australia (n=17,888)



**How did the pilot study work?**



# Requirements of Research Partners

- Pay \$150 to opt in
- Participate in a webinar about the survey process
- Review the survey protocol, and offer comments (optional)
- Send two email messages to a minimum of 1,500 recent ticket buyers
  - An initial invitation and reminder one week later
- Participate in a dashboard orientation webinar (optional)
- Review results in your online dashboard
- Meet in sub-groups to discuss findings
- Debrief results on webinar with other Study Partners (optional)

## CultureLab is based on the principle of transparency

- Participating organizations must agree to disclose their results to other partners...
- Everyone has access both to aggregate results, and also results at the organization level

# Pilot Study: “Universal Customer Profile”

- Buyer behaviors
  - loyalty, frequency, donor/membership status, social context, price sensitivity, advance planning time horizon, Initiator status, sources of information
- Preferences and tastes in the performing arts
  - cultural interests, risk profile, interest in 28 disciplines/genres
- Core values surrounding arts attendance
- Household information (key demographics, accessibility needs)



## Overview of Results

- 39 partner organizations
- 17,888 completed surveys
- Sample sizes vary for individual organizations from a low of 117 to a high of 1,219
  - Weights were applied to adjust so that all 39 organizations count equally
- Recognize the bias associated with online audiences surveys

# Thank you... !

- Albury Entertainment Centre
- BMEC
- Cairns Performing Arts Centre
- Capitol Theatre Tamworth
- Cessnock Performing Arts Centre
- Dubbo Regional Theatre and Convention Centre
- Empire Theatre Pty Ltd
- Glasshouse Port Macquarie
- Horham Town Hall
- Jetty Memorial Theatre
- Lighthouse Theatre Warrnambool
- MECC
- Murrumbidgee Theatre Company
- Mildura Arts Centre
- Moncrieff Entertainment Center
- Orange Civic Theatre
- Riverlinks Venues
- SA Country Arts
- Shoalhaven Entertainment Centre
- the Cube Wodonga
- West Gippsland Arts Centre
- Albany Entertainment Centre
- Bunjil Place
- Frankston Arts Centre
- Geelong Performing Arts Centre
- Ipswich Civic Centre
- ManPAC
- Musica Viva
- Redland Performing Arts Centre
- Riverside Theatres
- Seymour Centre
- State Theatre Centre of WA, His Majesty's Theatre and Subiaco Arts Centre
- Sutherland Entertainment Centre
- The Q
- Whitehorse Centre Nunawading
- the theatres at UWA
- Monkey Baa Theatre Company
- Civic Theatre Newcastle
- Street Theatre



**What were some of the most interesting results?**



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# WELCOME TO YOUR CUSTOM DASHBOARD!

Select a report below to explore your survey data.

[EDIT DASHBOARD \(PAC Australia\)](#)

## Customer Profile Survey

[Demographics](#)[Relationship with Study Partner](#)[Buyer Behaviors](#)[Cultural Frame and Values](#)[Preferences](#)[Detailed Preferences](#)[Media Usage](#)

## Exit Dashboard

The exit dashboard that respondents see upon completion of the survey.

[SELECTED RESULTS FROM THE ARTS & CULTURAL AUDIENCES PROFILE SURVEY](#)

## YOUR SURVEY RESPONSES

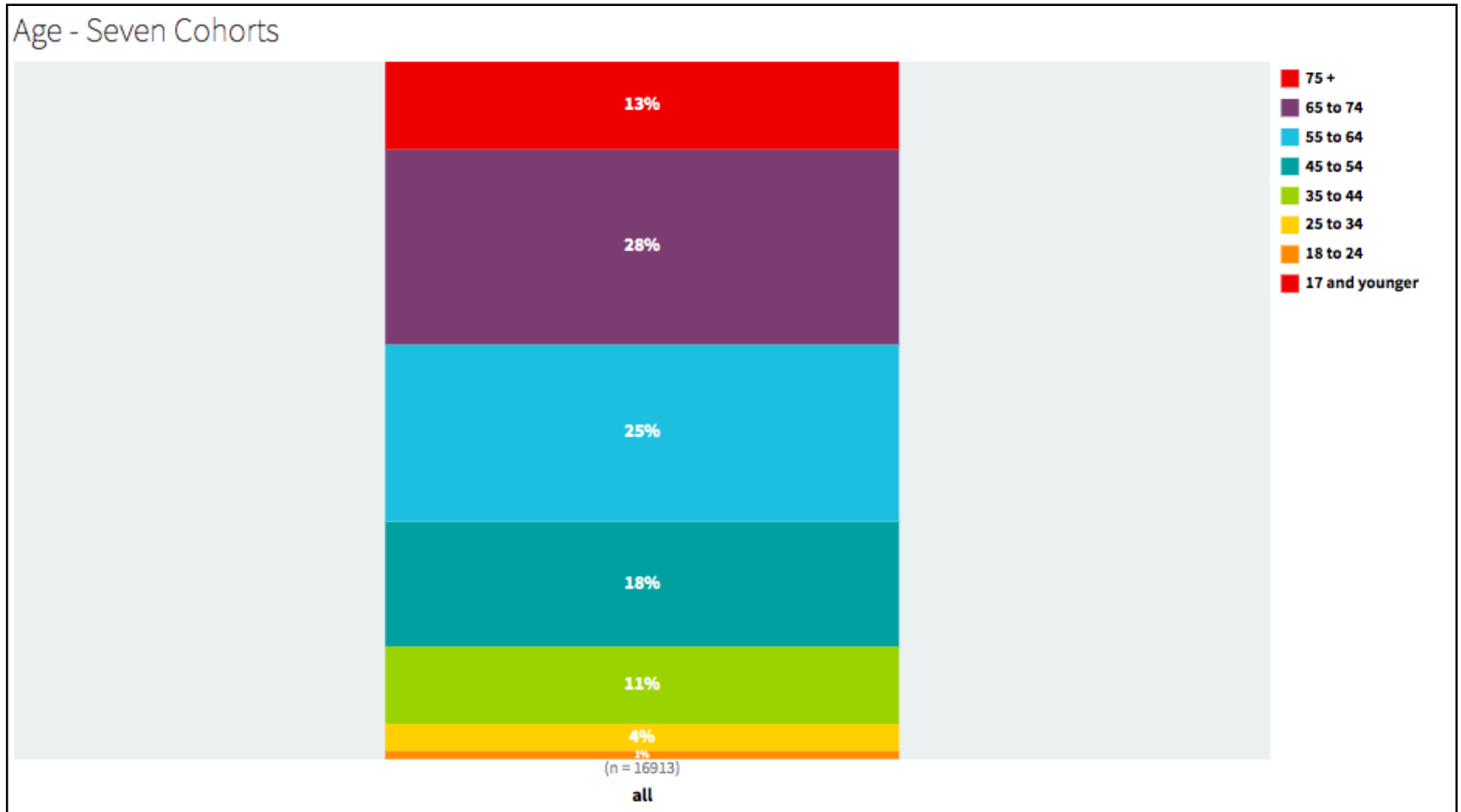
### Aggregates

Arts & Cultural Audiences Profile Survey (Aggregate)	AGGREGATE	17888
PAC Australia Metro Aggregate	AGGREGATE	8454
PAC Australia Regional Aggregate	AGGREGATE	9434

### Regional

SA Country Arts	AGGREGATE	345
Albury Entertainment Centre		263
BMEC		237
BREC		161
Cairns Performing Arts Centre		381
Capitol Theatre Tamworth (Entertainment Venues)		166
Cessnock Performing Arts Centre		217
Dubbo Regional Theatre and Convention Centre		526
Empire Theatre Pty Ltd		1032
Glasshouse Port Macquarie		633
Horham Town Hall		399

# Even accounting for loyalty bias, this is an older audience

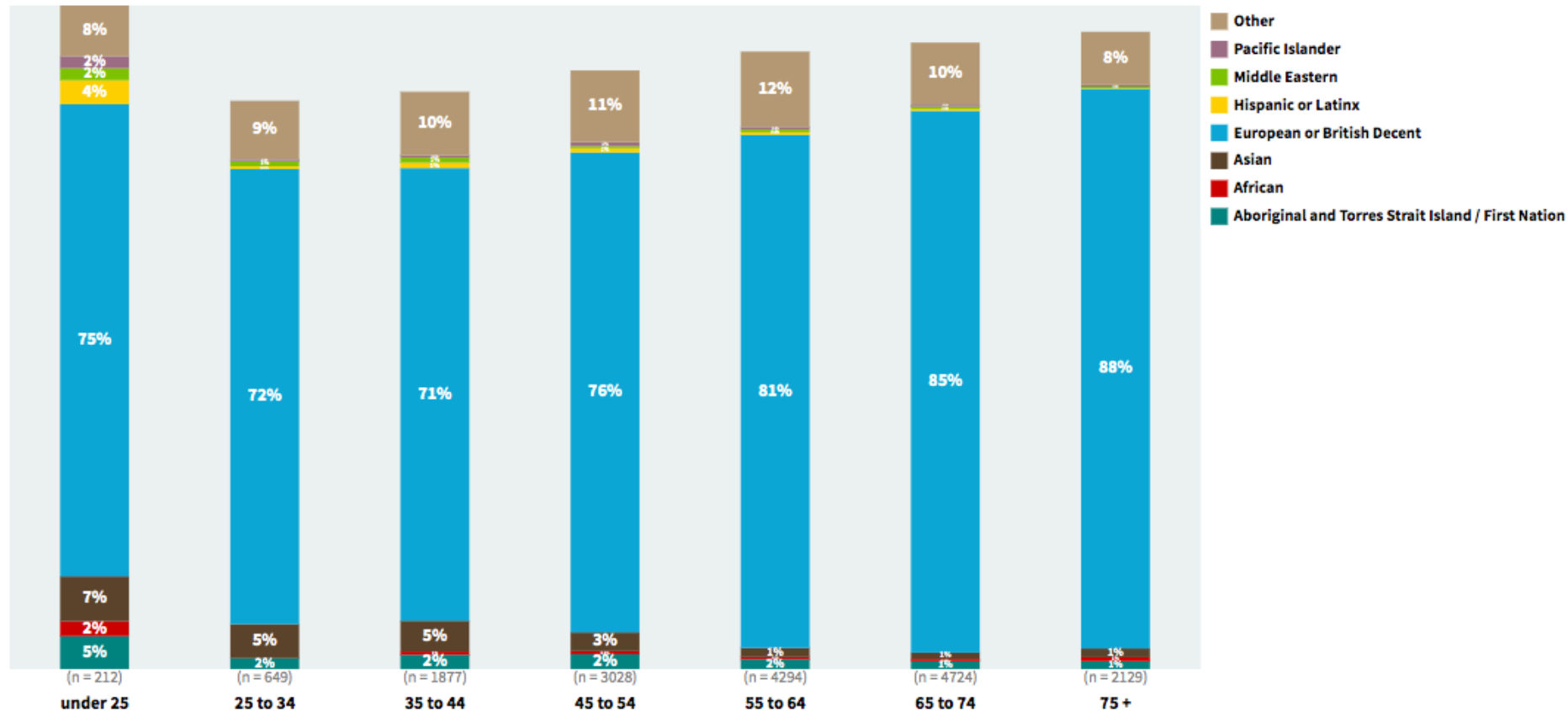


# Ethnic diversity declines with age

How do you identify in terms of race and/or ethnicity? (select multiple)

Filter: Age (7 cohorts)

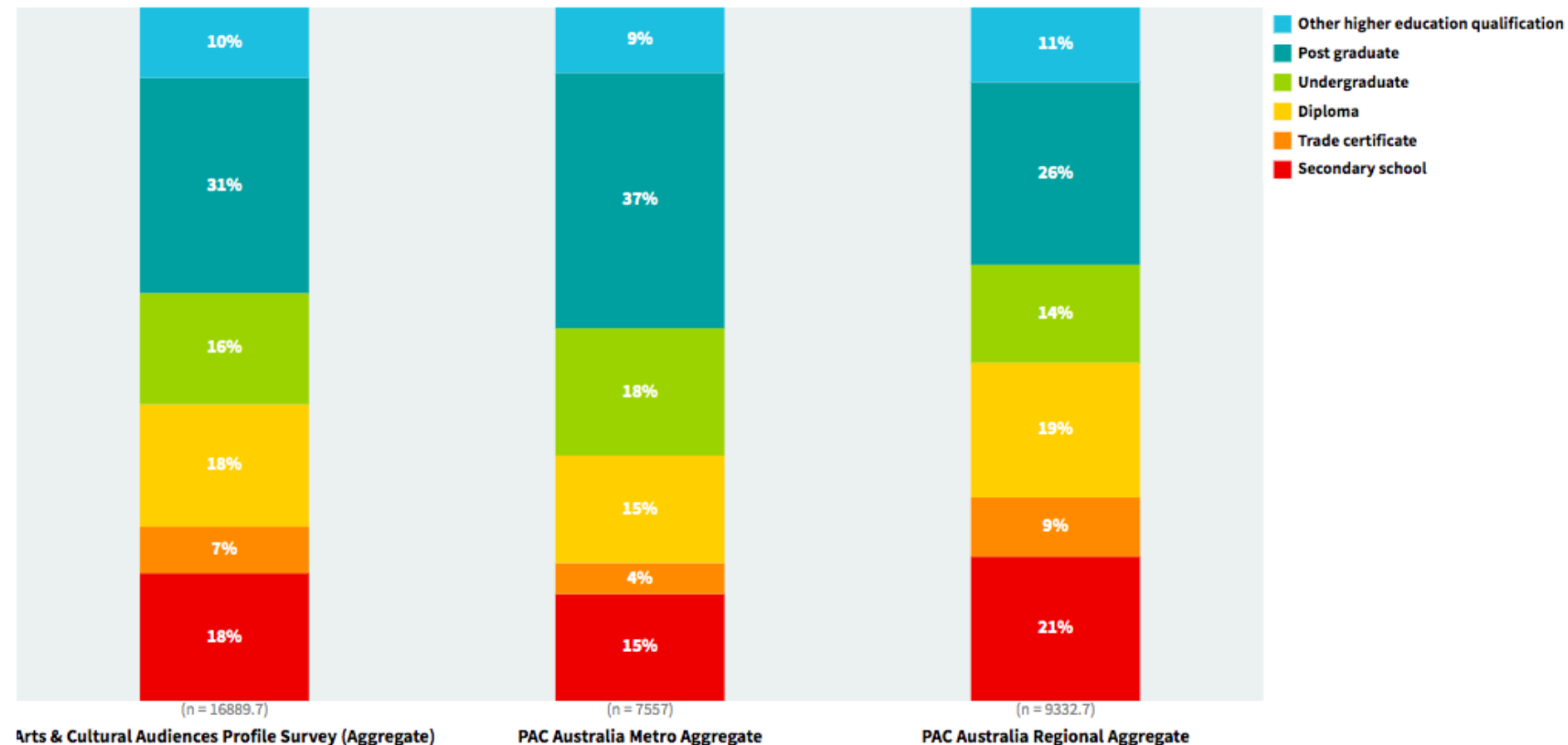
Note: columns on 'select multiple' questions will not total 100%.





# Respondents are diverse in terms of educational attainment

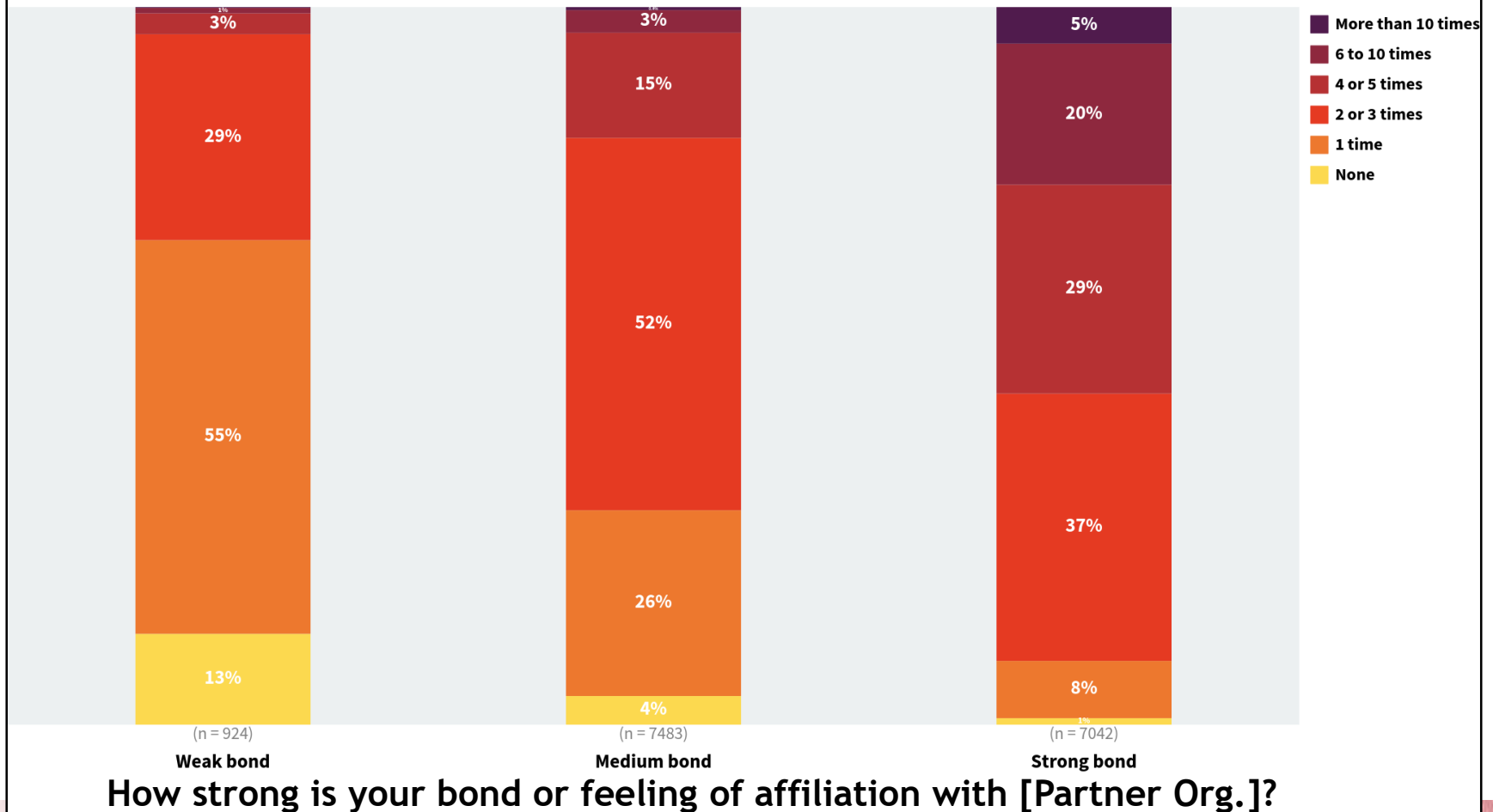
What is your highest level of educational attainment?



# Strong connection between loyalty and frequency

How many times did you attend live performances offered by [The Study Partner Organization] in the past 12 months?

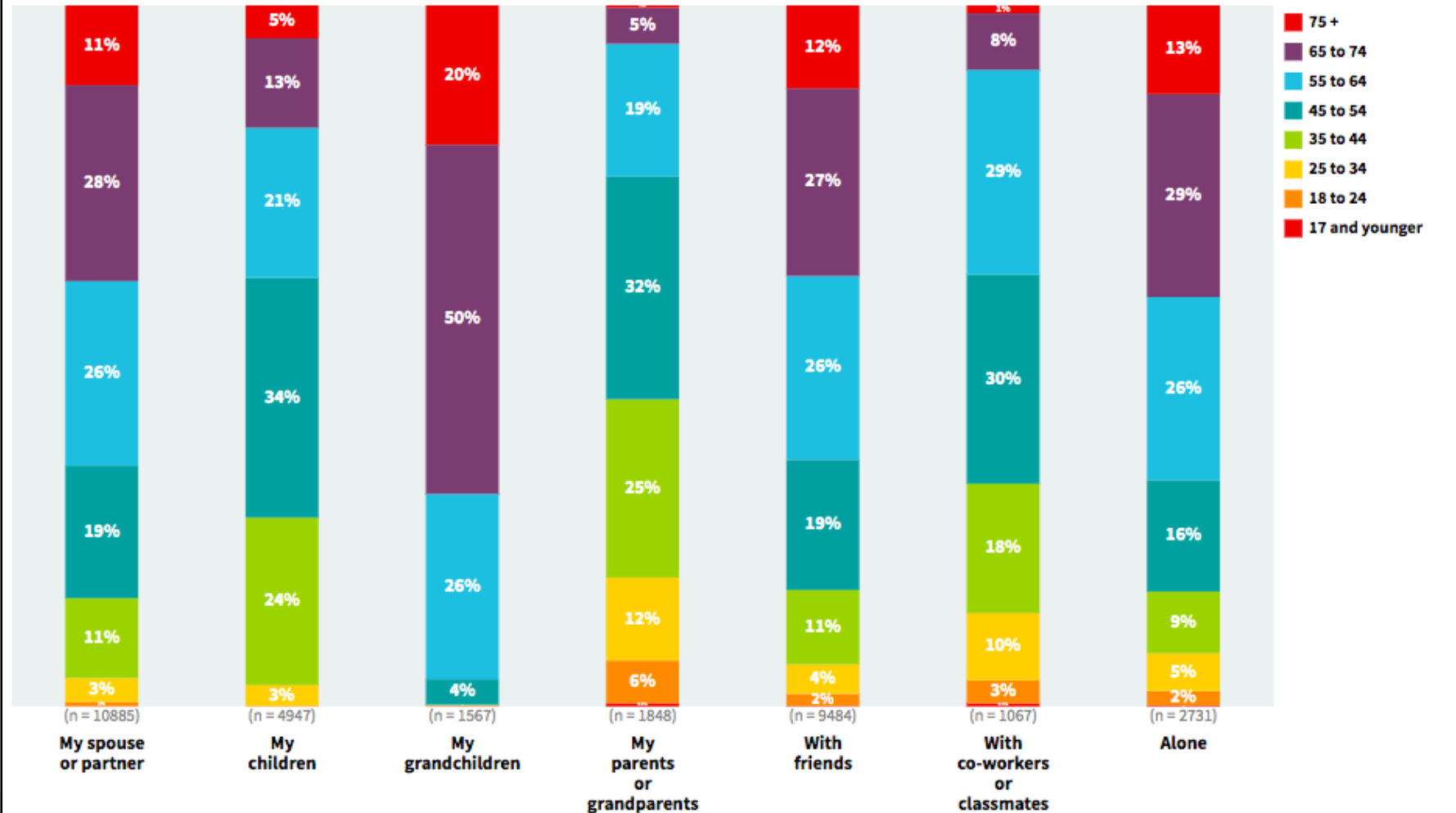
Filter: Org. Bond or Affiliation



# Intuitive relationship between age and social context

## Age - Seven Cohorts

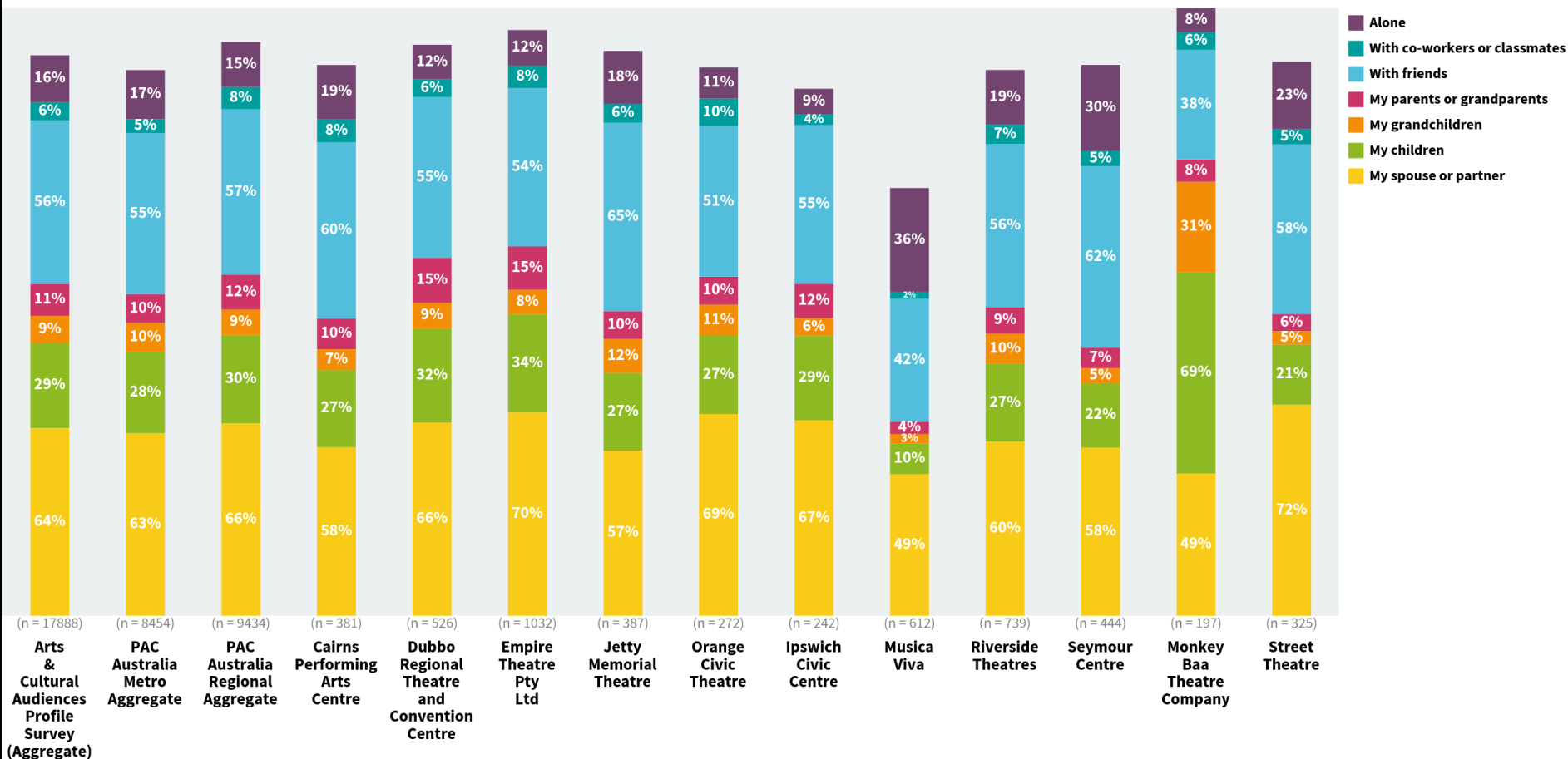
Filter: Social Context



# Social context varies across org. types

With whom do you normally attend live performances? (select multiple)

Note: columns on 'select multiple' questions will not total 100%.

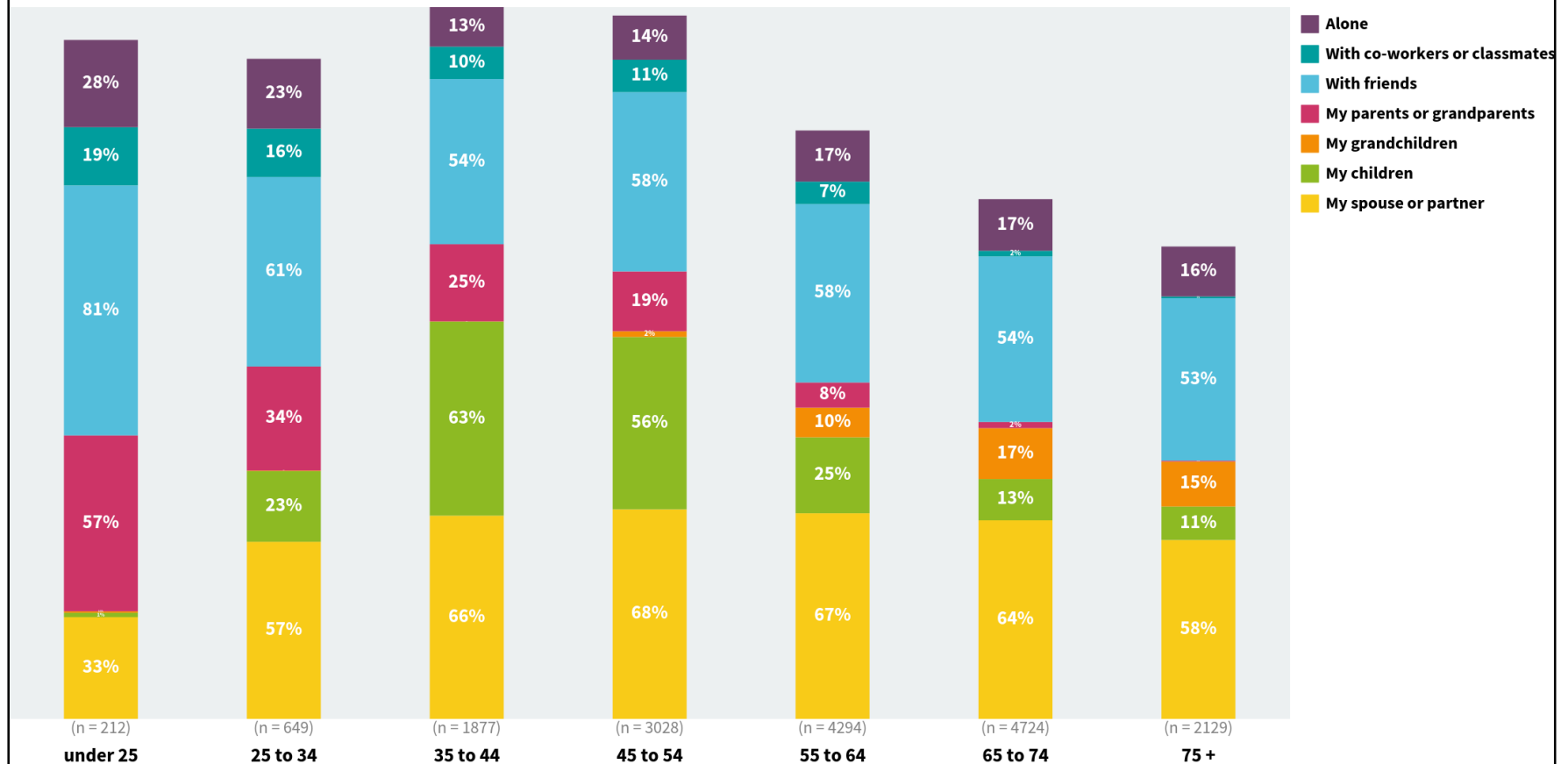


# Social context varies across lifestage

With whom do you normally attend live performances? (select multiple)

Filter: Age (7 cohorts)

Note: columns on 'select multiple' questions will not total 100%.



**Initiators: “I’m the kind of person who likes to organization outings to cultural events for my friends”**

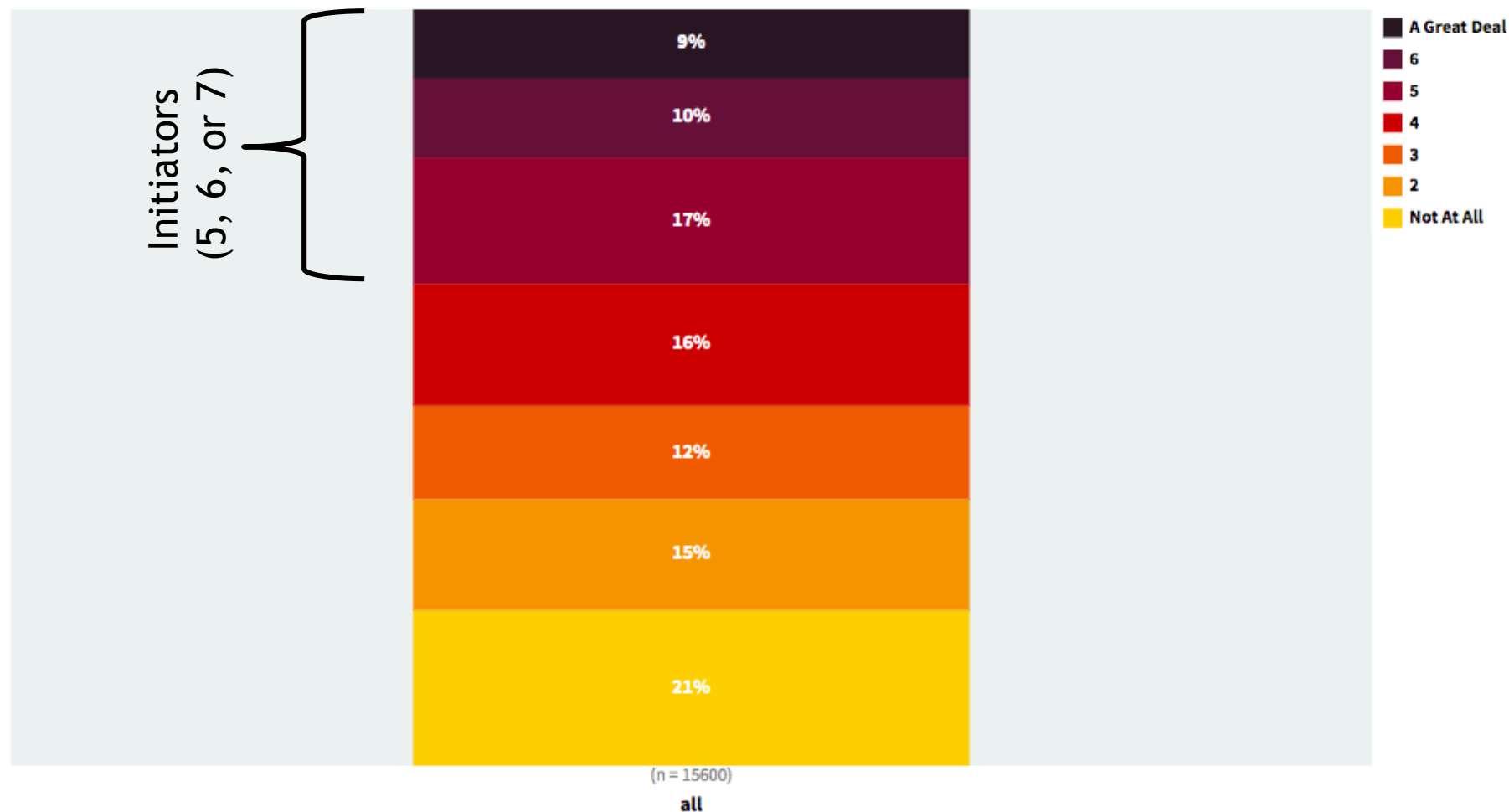
- Initiators are highly loyal patrons
- More likely to be women
- Younger, on average
- More knowledgeable about the art
- More likely to seek out diverse programming



# 36% of respondents were classified as Initiators

I'm the kind of person who likes to organize outings to cultural events for my friends.

Initiators  
(5, 6, or 7)

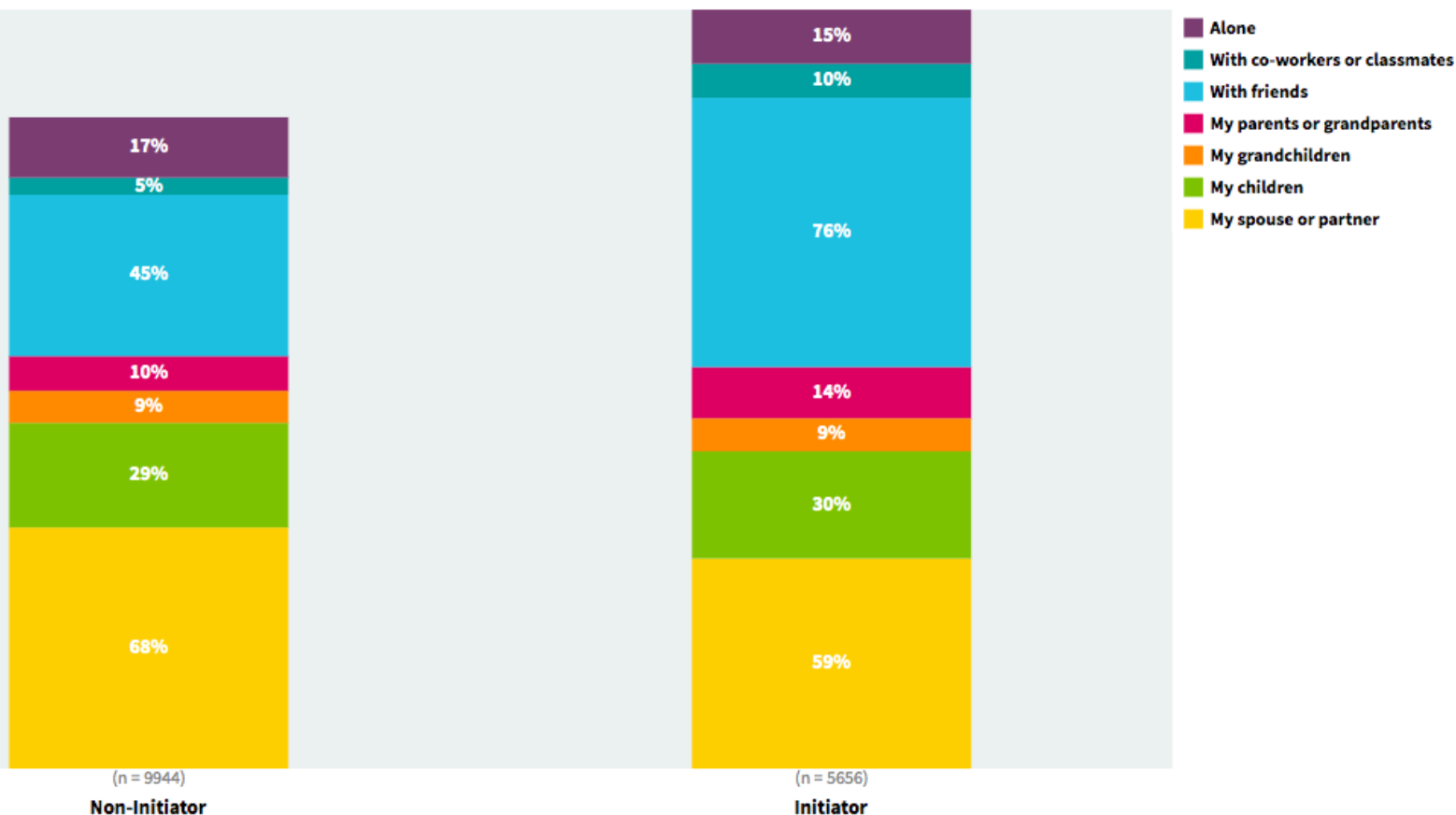


# Initiators bring friends to cultural programs

With whom do you normally attend live performances? (select multiple)

Filter: Initiator/Non-Initiator

Note: columns on 'select multiple' questions will not total 100%.

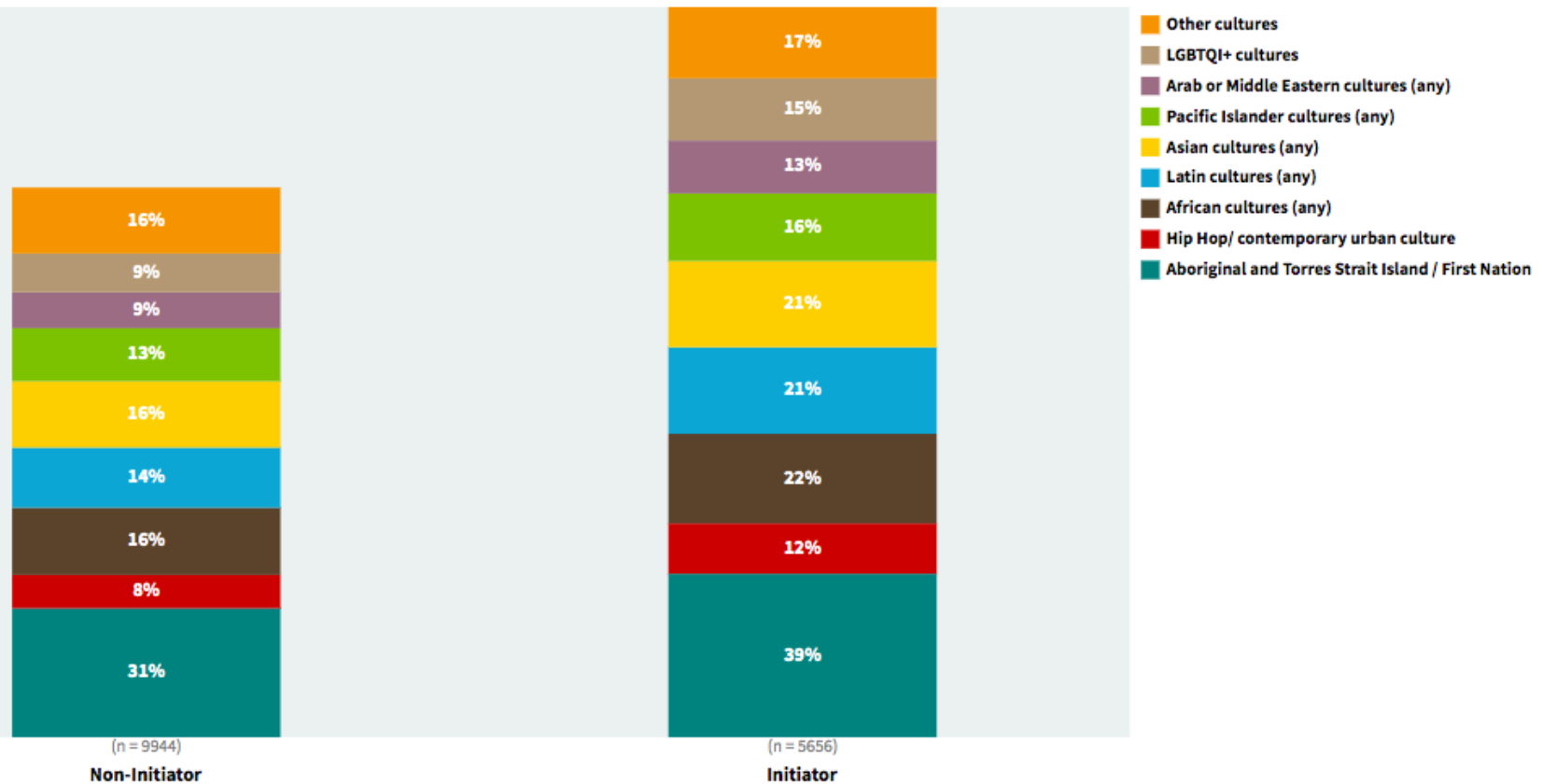


# Initiators are culturally curious...

Do you take a special interest in any of the following specific cultures? (select multiple)

Filter: Initiator/Non-Initiator

Note: columns on 'select multiple' questions will not total 100%.

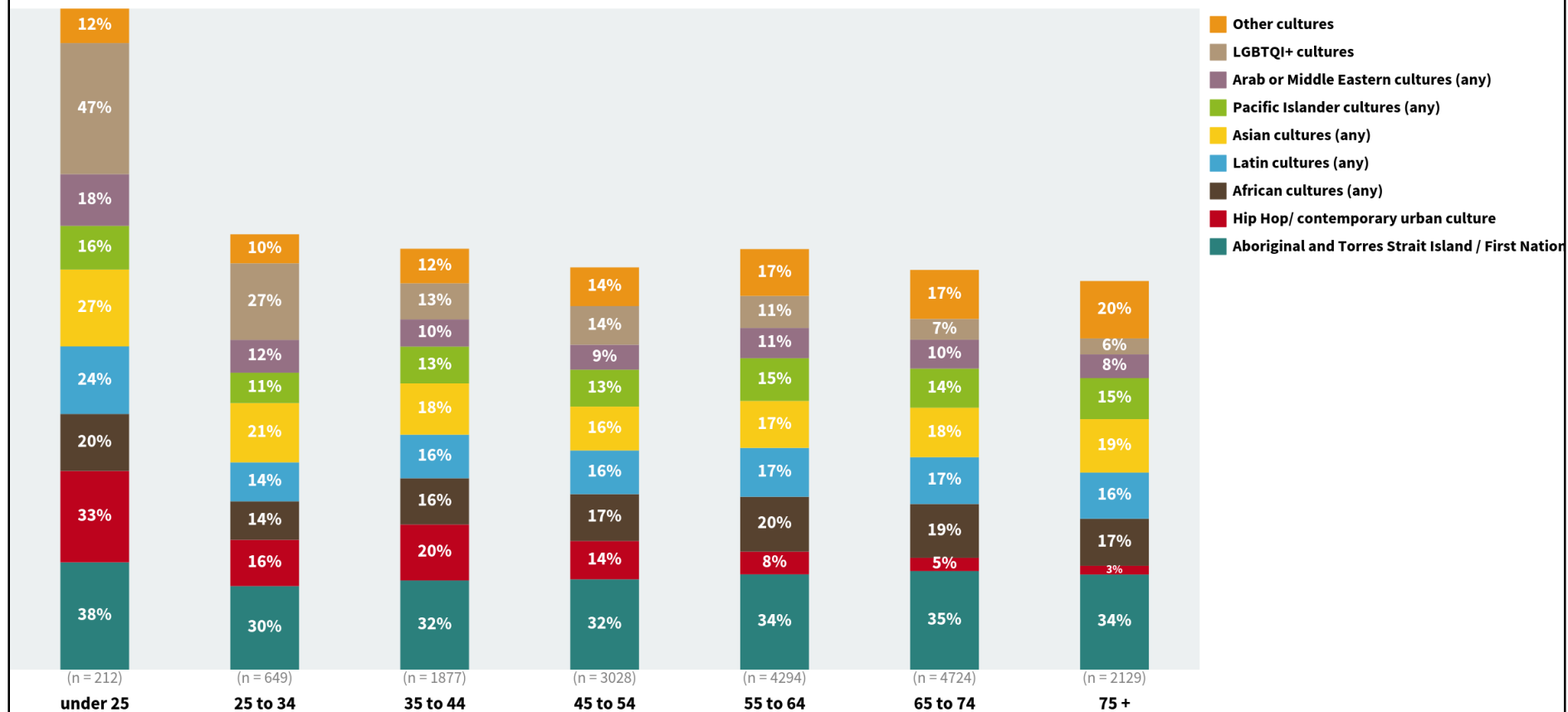


# Cultural interests are broader for young adults

Do you take a special interest in any of the following specific cultures? (select multiple)

Filter: Age (7 cohorts)

Note: columns on 'select multiple' questions will not total 100%.

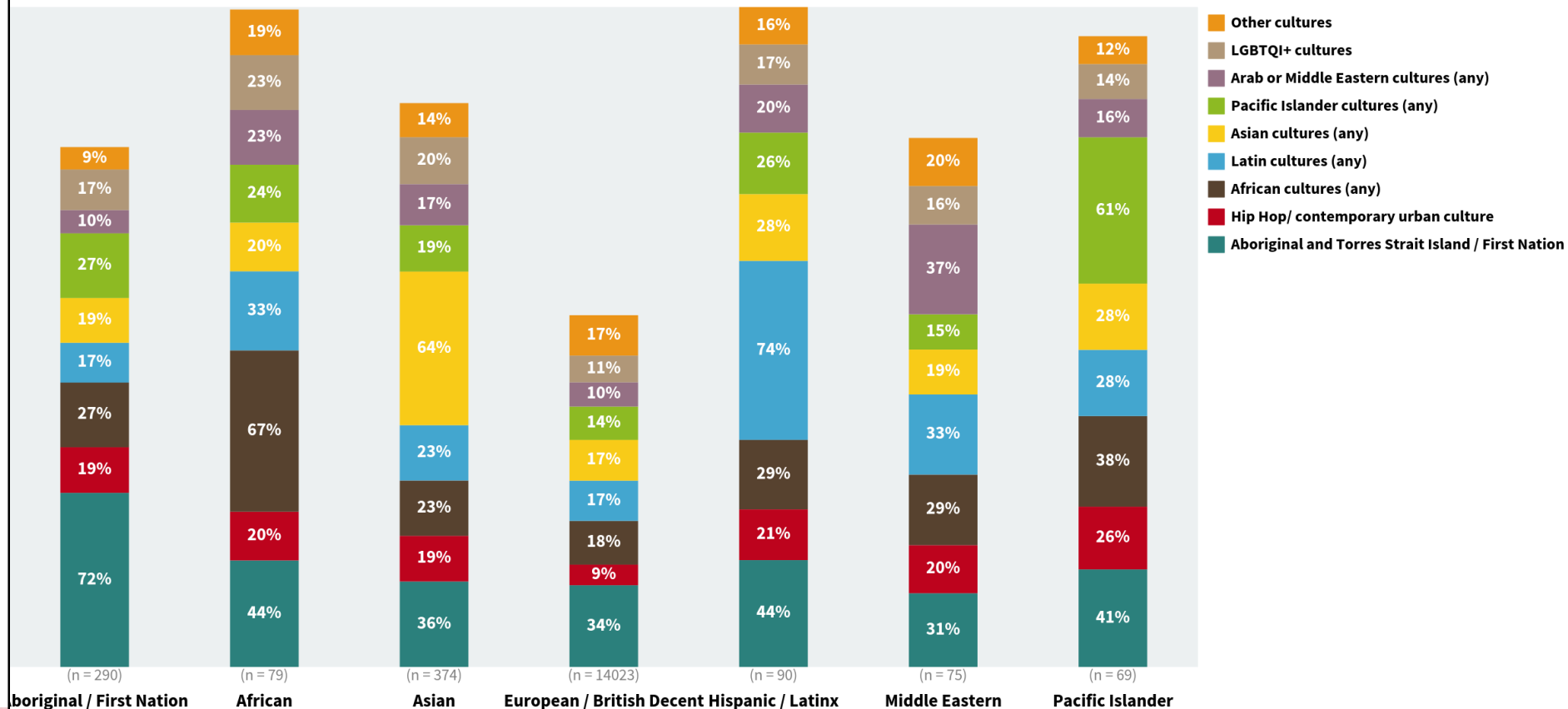


# Cultural interests both reflect and transcend cultural background

Do you take a special interest in any of the following specific cultures? (select multiple)

Filter: Race/Ethnicity

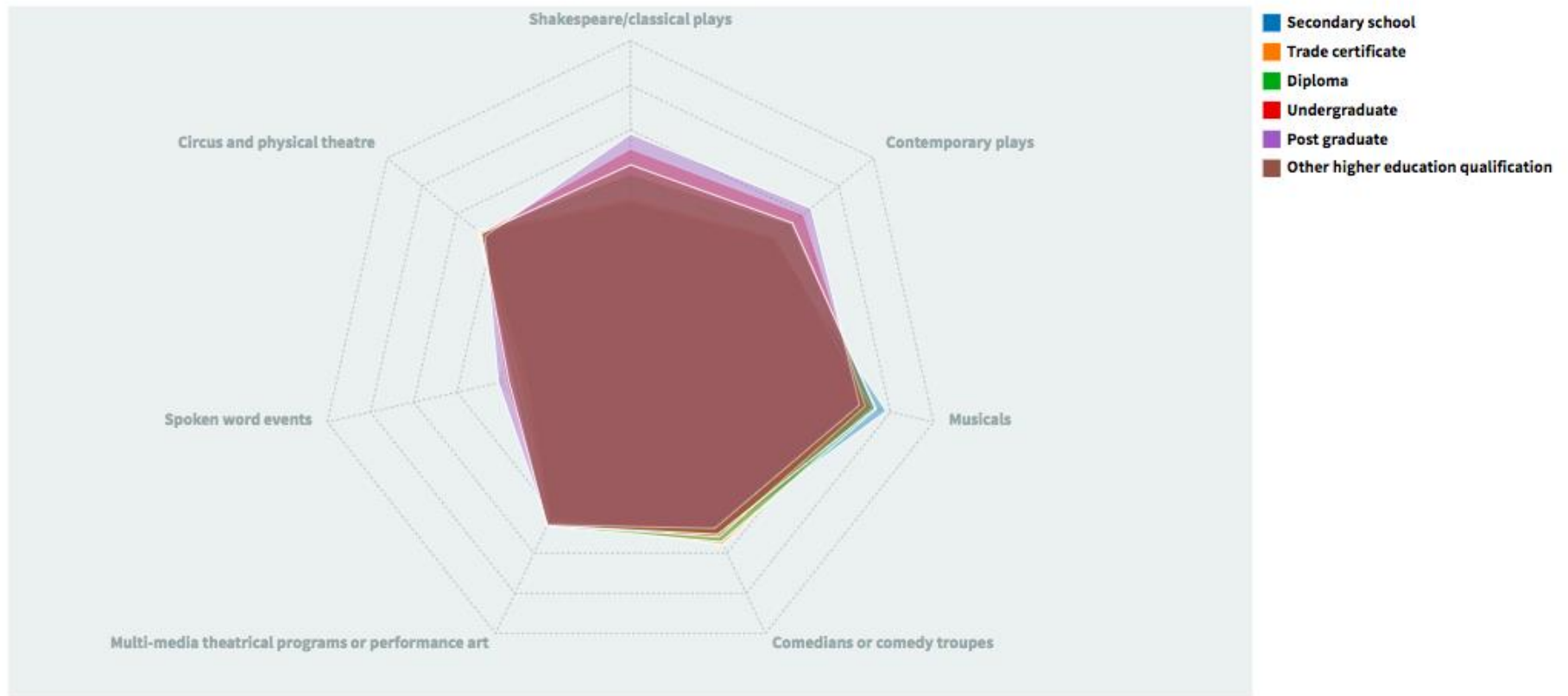
Note: columns on 'select multiple' questions will not total 100%.



# Interest in theatrical genres rises with educational attainment (go into live dashboard)

What is your level of interest in attending the following types of theatrical performances?

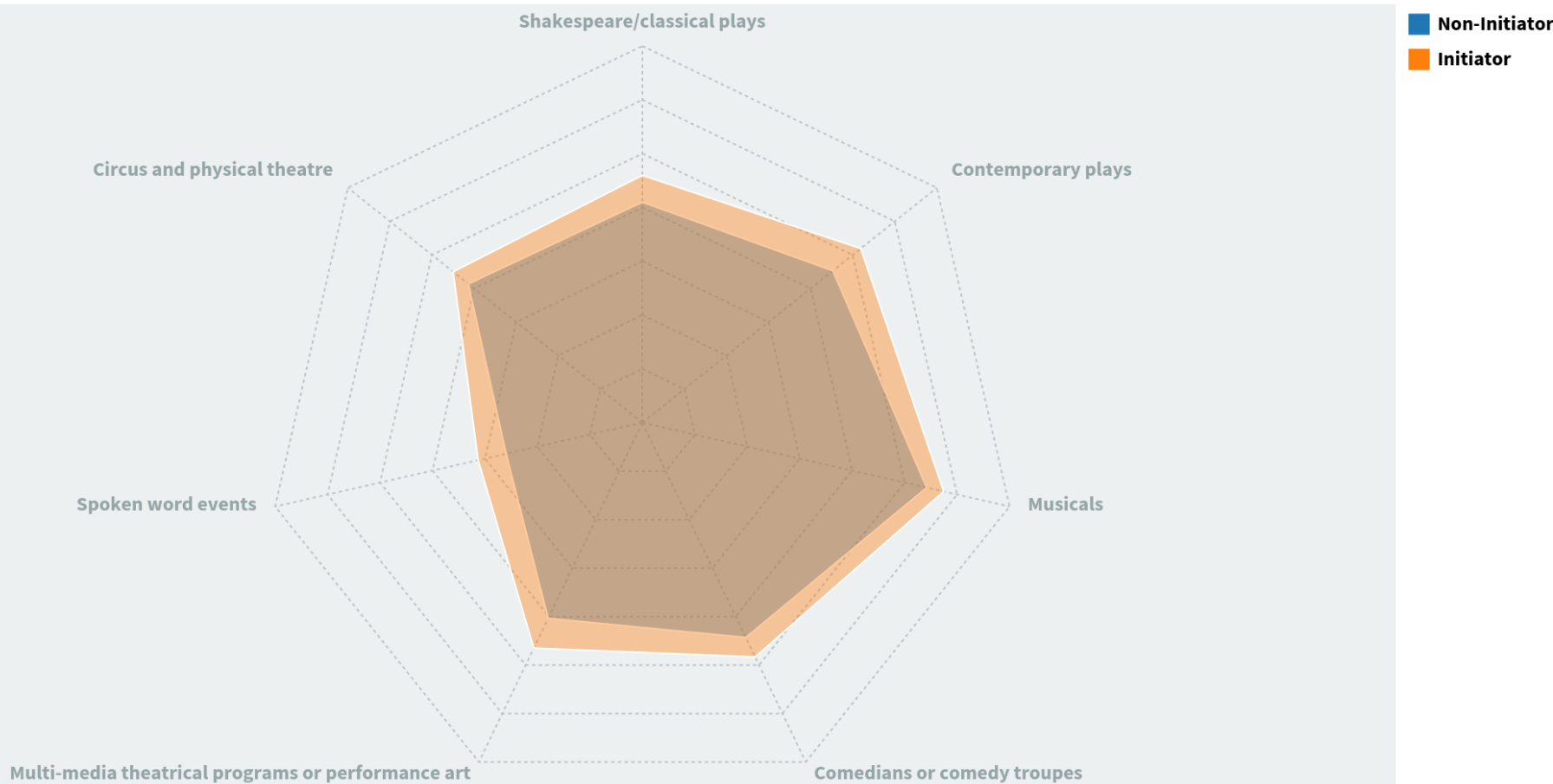
Filter: Education





# What is your level of interest in attending the following types of theatrical performances?

Filter: Initiator/Non-Initiator



# Reality check: music preferences of Musica Viva respondents vs. Aggregate Metro sample

What is your level of interest in attending the following types of live music performances?

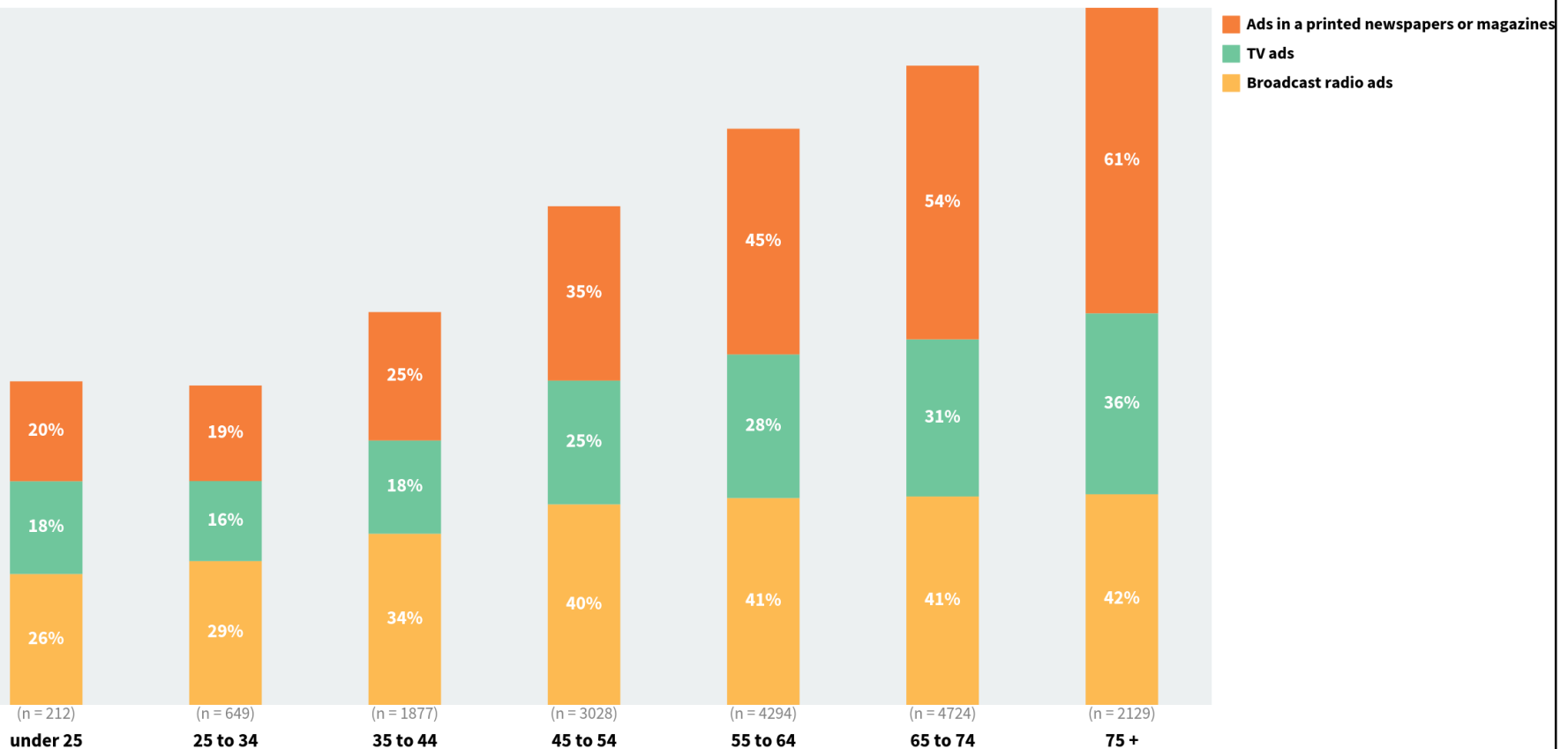


# Traditional media is reaching younger patrons at a sharply declining rate

We are curious to know which radio, tv, and printed media sources you access. Do you typically receive information about upcoming performances through...? (select multiple)

Filter: Age (7 cohorts)

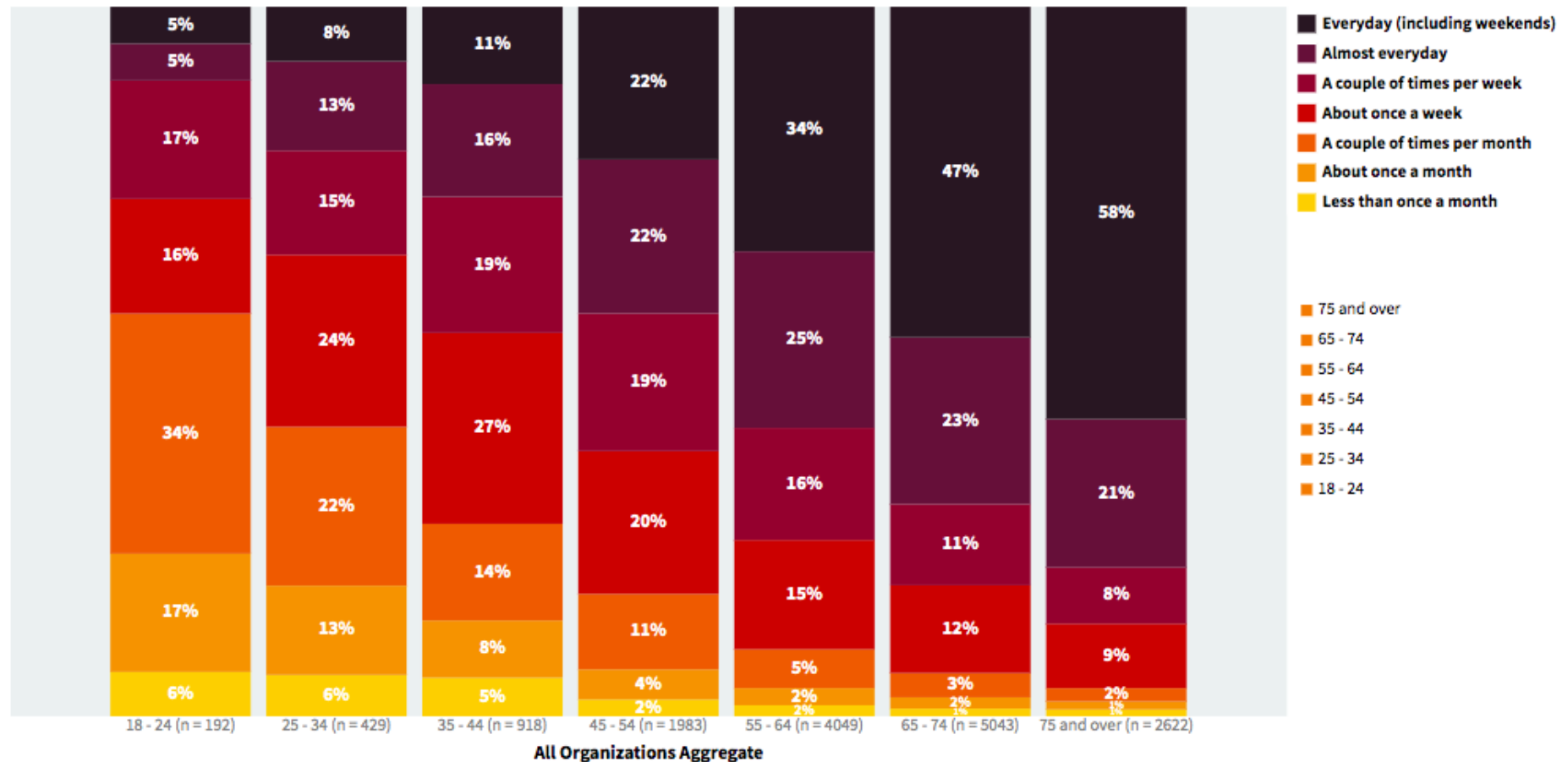
Note: columns on 'select multiple' questions will not total 100%.



# In the US, we also see a generational shift away from newspaper readership

(When applicable) About how frequently do you read the local newspaper?

Filter: Age cohorts

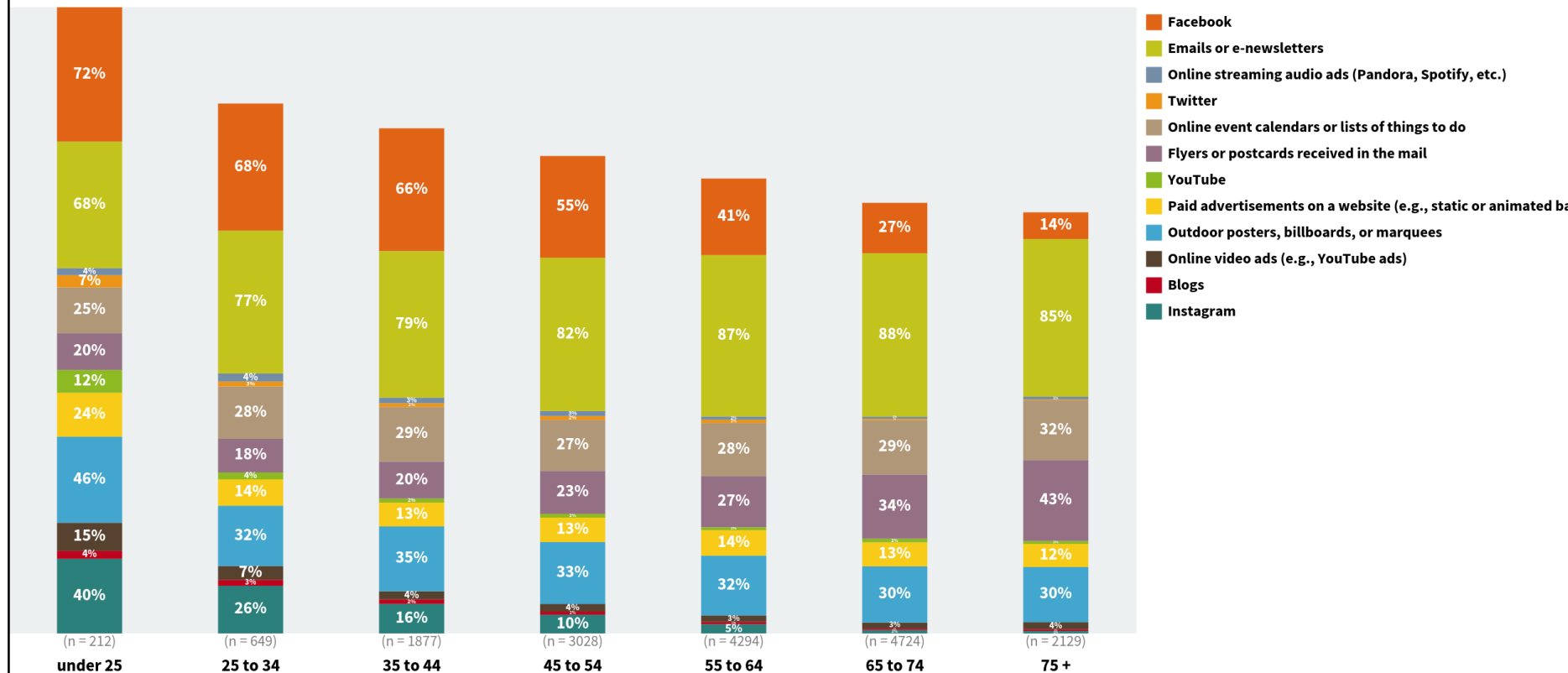


# Digital media sources are more prevalent and more diverse for younger patrons

Do you typically receive information about upcoming performances through...? (select multiple)

Filter: Age (7 cohorts)

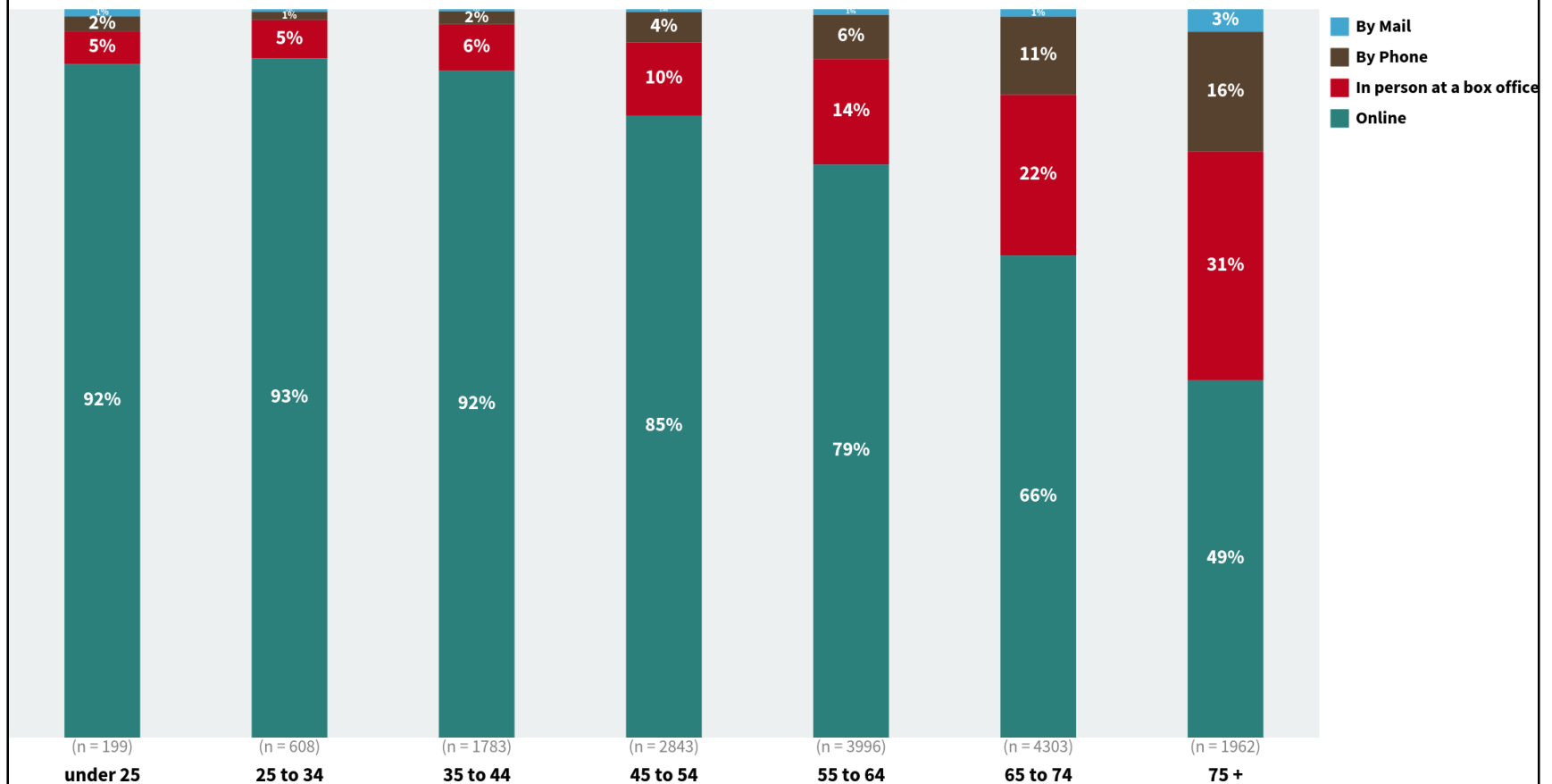
Note: columns on 'select multiple' questions will not total 100%.



# Older patrons are still buying by phone and in-person

How are you most likely to purchase tickets for performing arts events?

Filter: Age (7 cohorts)

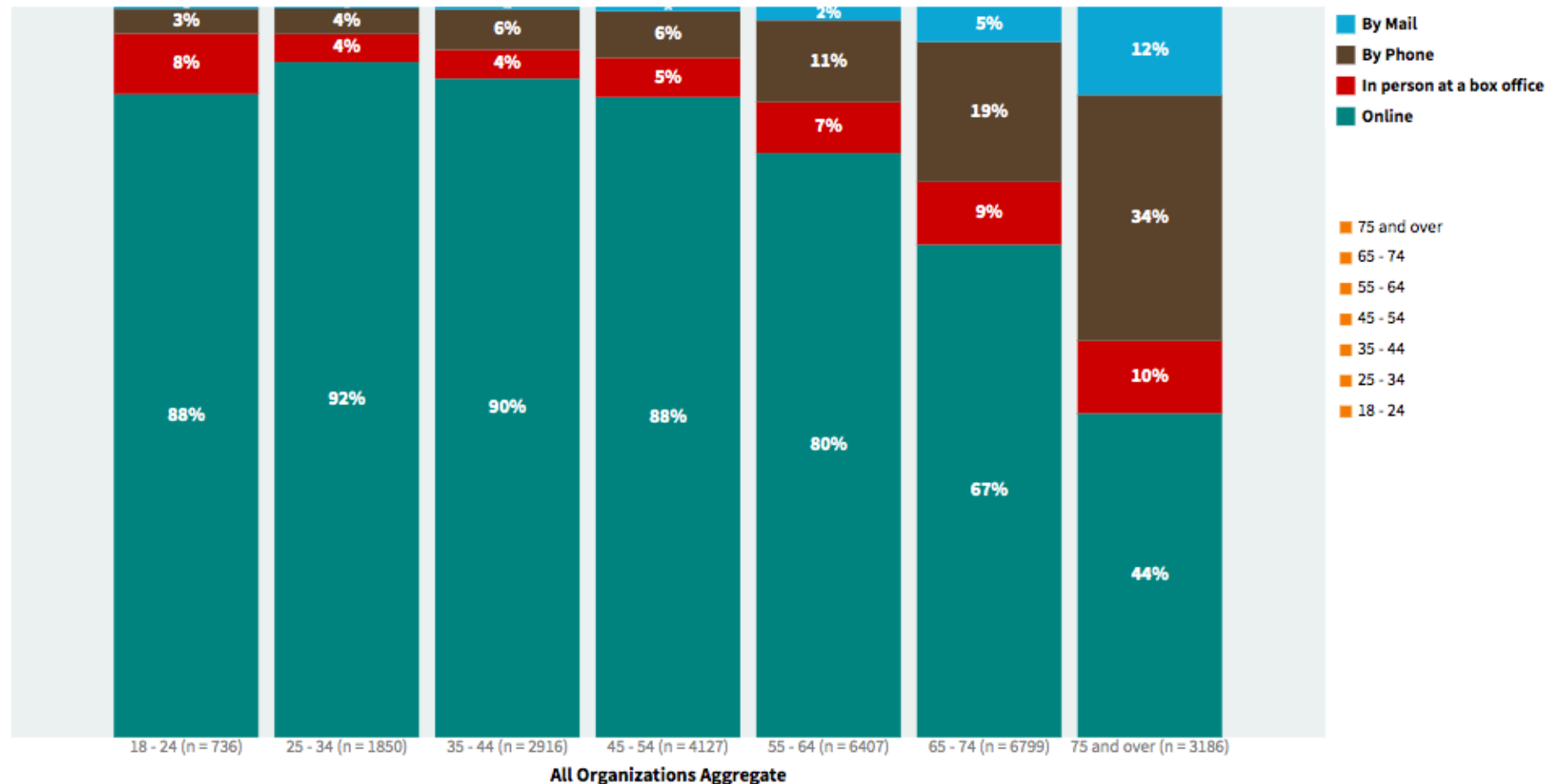




# Similar pattern in the US... although older adults in the US are more likely to order by phone

How are you most likely to purchase tickets for performing arts events?

Filter: Age cohorts

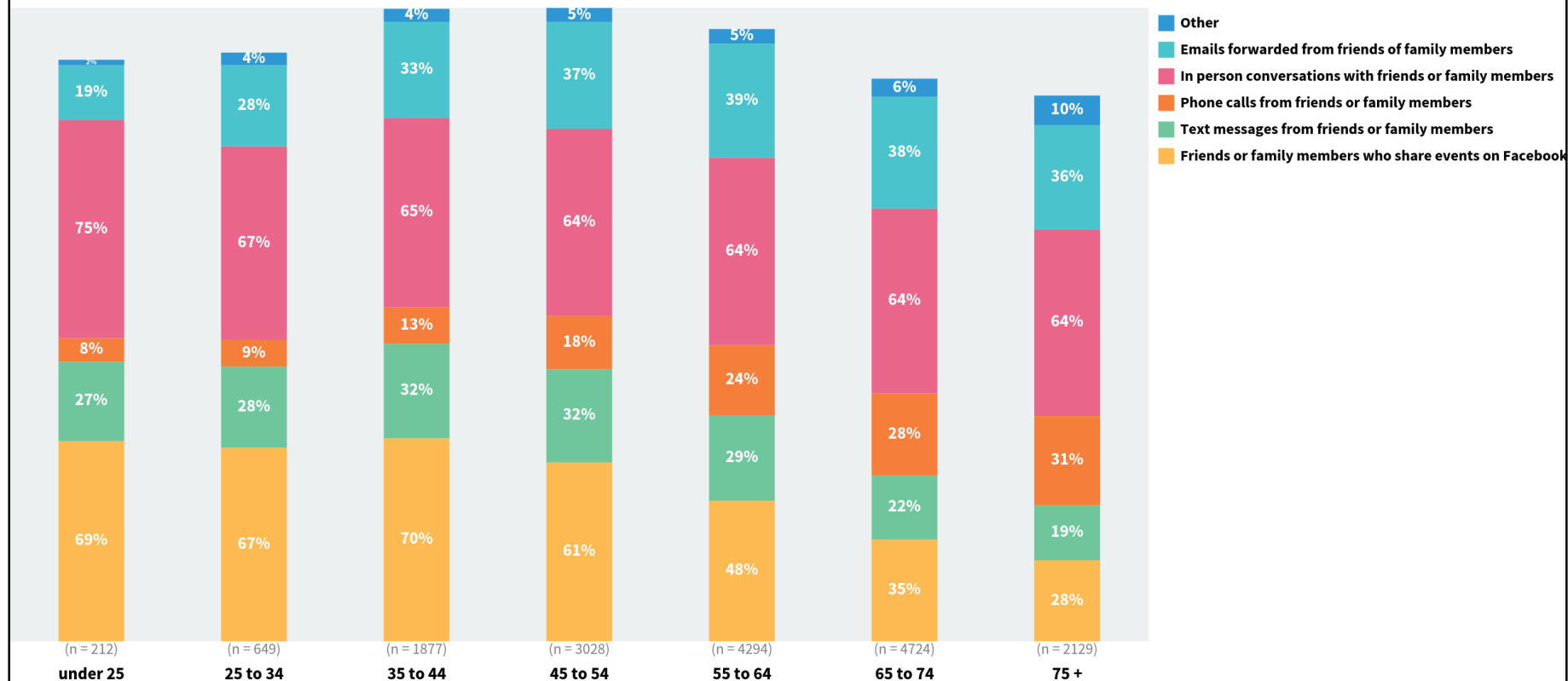


# How does “word-of-mouth” happen?

In surveys like this one, many people cite "word of mouth" as a source of information but little is understood about what that means. Do you receive information about upcoming performances from... (select multiple)

Filter: Age (7 cohorts)

Note: columns on 'select multiple' questions will not total 100%.

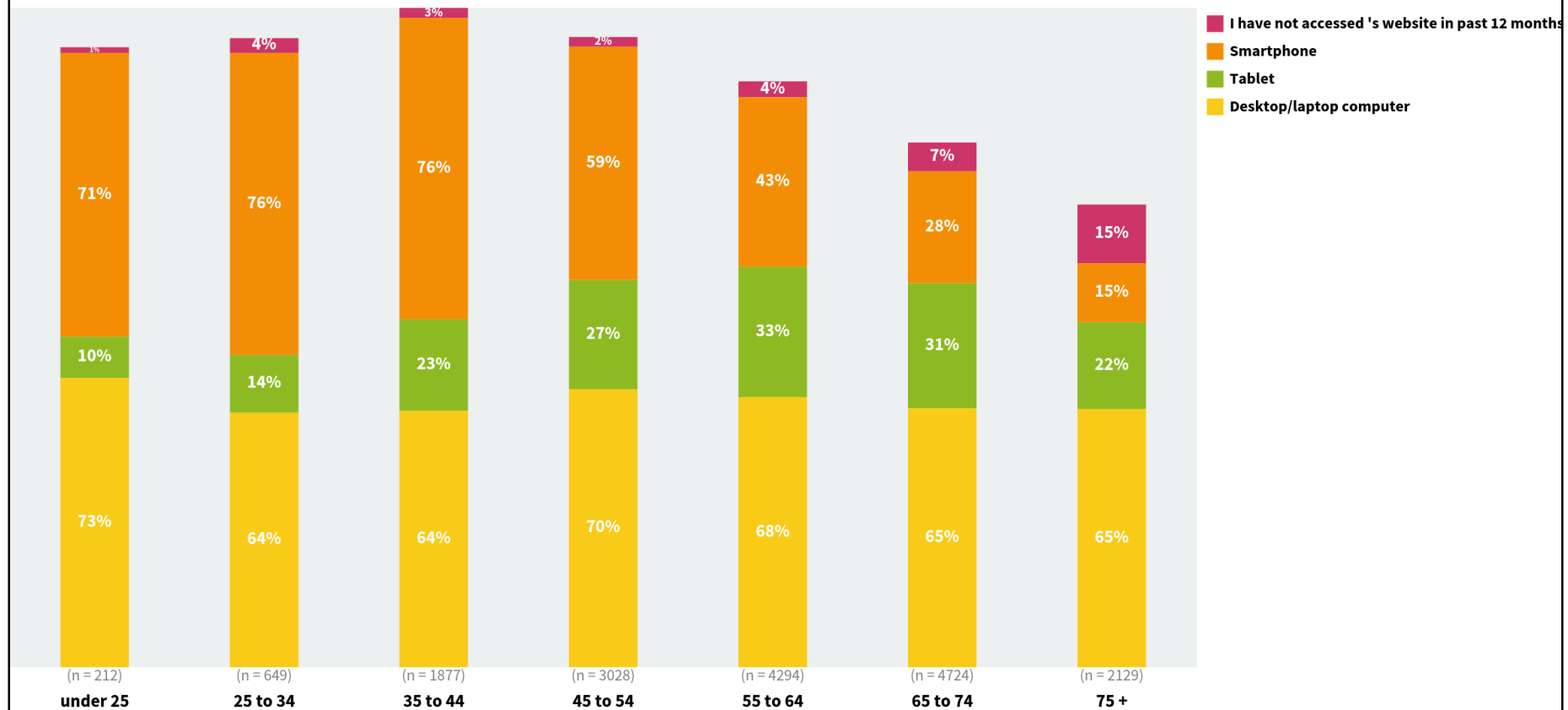


# Mobile optimization is mandatory

On which devices, if any, have you visited [The Study Partner Organization's] website in the past twelve months? (select multiple)

Filter: Age (7 cohorts)

Note: columns on 'select multiple' questions will not total 100%.

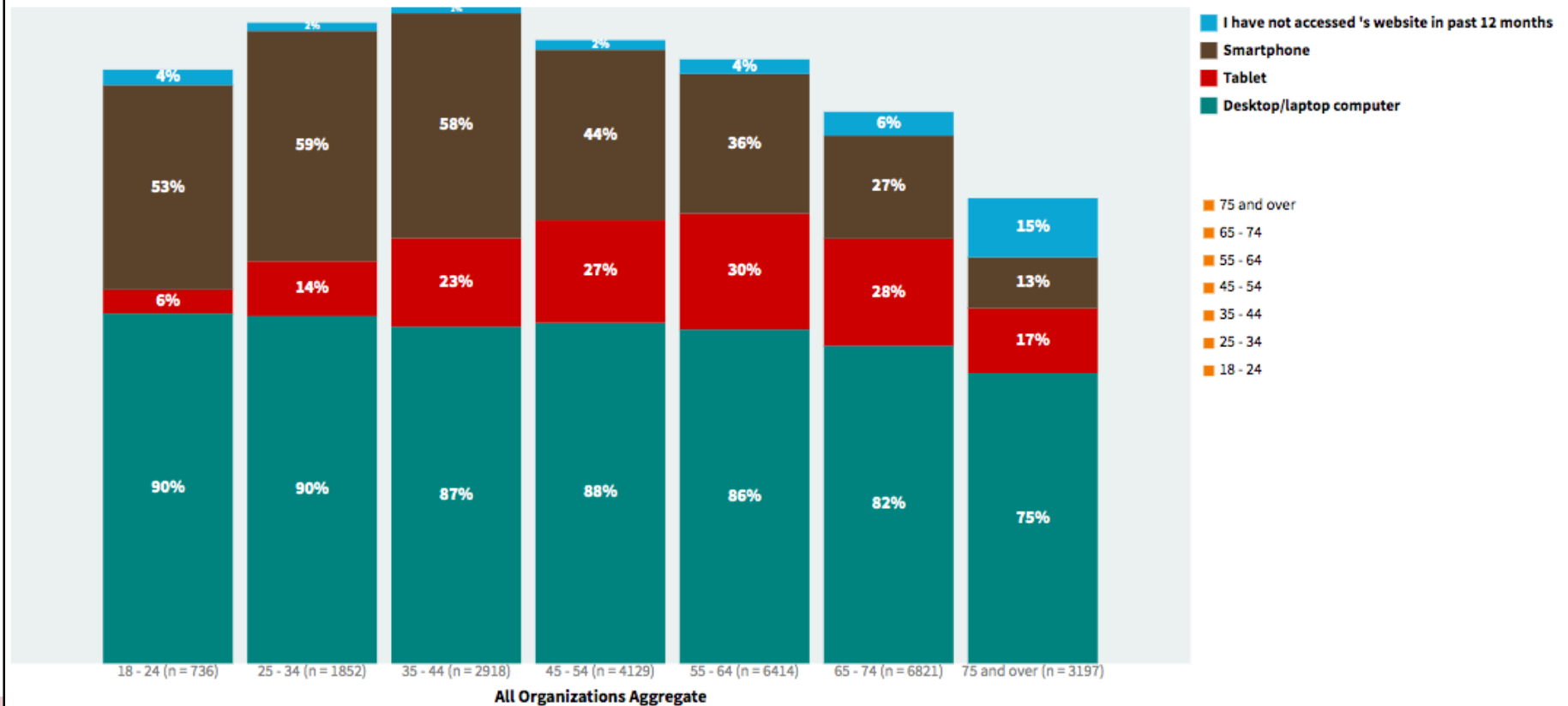


# Compared to US data, Australian use of smart phones for web browsing is higher (same graph, different colors)

On which devices, if any, have you visited [The Study Partner Organization's] website in the past twelve months?

Filter: Age cohorts

Note: columns on 'select multiple' questions will not total 100%.





**What might the future hold?**

# Potential Research Topics

- Preferences for curtain times, seat preferences, price sensitivity
- Attitudes about advance planning, subscription, and membership schemes
- Broadcast and digital media consumption patterns, web site usage, device usage
- Core values, self-perceptions and beliefs that influence arts attendance
- Deep dives into lifetime arc of experience with specific disciplines (e.g., dance)
- Attitudes and preferences for engaging around the art (i.e., preparation, follow-up)
- Donor motivations and related philanthropic issues
- Attitudes about risk and adventurousness
- Impact



The background features a large, semi-transparent red circle on the left side. To its right, there are several smaller, semi-transparent red circles of varying sizes. The entire background is a light red color with a subtle texture. The text "Q & A" is centered within the large red circle.

Q & A

PAC Australia





**Thank You**

 **ENGAGE**