



In Search of the Magic Bullet:

Results from the Building Audiences
for Sustainability Initiative

Francie Ostrower, Ph.D.

A report of the
*Building Audiences for Sustainability:
Research and Evaluation* study

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About the Author

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Executive Summary

NATIONAL STATISTICS SHOW STAGNANT OR declining attendance at multiple art forms in which nonprofit organizations work.¹ The Wallace Foundation's Building Audiences for Sustainability initiative (BAS) awarded nearly \$41 million in grants between 2015 and 2019 to explore audience-building challenges and the connection between building audiences and financial sustainability. The Foundation awarded grants to 25 large nonprofit performing arts organizations from different artistic disciplines to try to engage new audiences while retaining existing ones and to see whether audience-building efforts contribute to organizations' financial health.

Organizations' projects differed, as did the audiences they sought to recruit, which variously included millennial and Gen X audiences; more racially and ethnically diverse audiences; audiences for new and less familiar works; geographically based audiences; infrequent attendees (hoping to motivate them to attend more often); and others. All organizations worked within the initiative's continuous learning framework, involving an iterative process of project design, analysis, and assessment of changes needed for improvement. Within that framework, many approached grant funding as risk capital for experimentation with new and varied approaches.

What insights do the results of their efforts and experimentation offer for other nonprofit performing arts organizations facing similar challenges? After awarding the BAS grants, The Wallace Foundation awarded a grant to The University of Texas at Austin to independently study the implementation and outcomes of the organizations' audience-building projects. To provide an empirically grounded and multi-faceted account, the study included three major data collection ef-

forts between 2015 and 2022: Conducting hundreds of interviews with organizational leaders and staff; conducting audience surveys; and compiling data from organizational ticket databases.

When organizations completed their projects in 2019, little could anyone have imagined that performing arts venues would soon be shuttered by a global COVID-19 pandemic. As performing arts organizations have re-opened, the challenges of audience and financial sustainability remain all too relevant. We hope findings from this study and the initiative can help inform conversations about addressing these challenges. That said, it should also be kept in mind that the BAS organizations were large, established nonprofits. Their issues clearly resonate more widely with those of similar organizations but not necessarily with those of others.

As much as we wish it were otherwise, the reader should be forewarned that neither the initiative nor this study yielded easy solutions to the problems. As the leader of one BAS organization said, "We were, in good faith, hoping to find the magic bullet. . . . I don't think we or anyone else has found it." Still, the projects and their results do provide a wealth of insights about some approaches that proved effective—and equally important, about those that proved not to be. Furthermore, our analyses highlight that expanding audiences may happen, but not necessarily on the organization's original terms. An overarching message to emerge from our findings: If organizations want to change audience engagement with them, then organizations need to be open to changing themselves.

The reader will find detailed discussions of specific audience-building approaches, efforts to attract particular target audiences, and financial correlates of audience gains in the full report. Here we summarize the study's overall findings and implications.

Audience-Building Approaches

Study findings highlight the importance of how organizations think about audience building as well as the specific strategies employed. Key findings include:

Identifying and Revising Assumptions

- Working within the continuous learning framework, organizations often found they held unexamined and unfounded assumptions that were hindering their ability to connect with audiences they hoped to reach. Engaging with data helped organizations identify unfounded assumptions, which many then revised to positive effect.
- Organizations often learned they were communicating in ways that were meaningful to themselves and others in their artistic fields but that did not resonate with audiences they hoped to reach. Here too, engaging with data helped identify the problem. Many revised their communications to be more welcoming, informative, and responsive.

Audience-Building Strategies

- Organizations found some audience-building approaches consistently helpful (changing/expanding their communication content and vehicles), some approaches consistently disappointing (“crossover strategies,” where organizations offered different programming to attract new audiences in the hopes the new audiences would then attend traditional programming), and, depending on their goals, had different experiences with others (performing at offsite venues).
- Many organizations increased their ability to communicate with intended audiences through expanded use of digital communications (e.g., email, social media, and, in some cases, video trailers).
- Special programming, as noted, did not yield hoped-for crossover. Still, when that special programming did attract the chosen target audience, some organizations kept the programming and revised their metric of success. Here, organizations came to value the programming for attracting new audiences (even if they did not attend other programs) and for diversifying the organization’s artistic offerings.
- Sometimes, success initially attributed to a particular strategy (such as a new production series or pre-show events), later proved to be a function of a particular production or featured artist. Thus, the efficacy of particular strategies needs to be assessed over a sustained period of time.

Audience-Building Outcomes

The study also examined changes in both target audience and overall attendance patterns. In both cases, considering numbers of audience members as well as frequency of attendance proved key to assessing audience change. Among the main findings:

- Most of the subset of fifteen organizations in the outcomes study saw expansion in their target audience between 2015 and 2019, although changes were often more modest than the initially hoped-for gains.
- Given that most organizations chose target audiences with a small initial presence in their audience, even dramatic target-audience gains generally did not impact organizations’ total attendance. As this suggests, different target audiences hold greater or lesser potential to impact the organization’s total attendance.
- Attracting additional target-audience members to attend was more readily achieved than engaging them as frequent attendees. And, of the two organizations that specifically chose infrequent attendees as their target audience (in the hopes of converting them to frequent attendees) neither met with success.
- At the level of total main season attendance, we found that many organizations saw audience gains coupled with a decline in frequency of attendance. In other words, more people were actually attending, but they were attending less often.
- Audience-building strategies were often premised on the assumption that once attracted, new audience members would progress to become more frequent attendees (hopefully subscribers) and then donors. By the end of the initiative, however, at least a few participants were questioning what one called “this old myth of the long slow escalator.”

Audience Building and Financial Health

This study explored associations between changes in target audience and financial indicators as well as between changes in organizations’ total attendance and financial indicators. We also explored how organizations themselves thought about audience building and financial health. Among the main findings:

- We found no associations between changes in target-audience attendance and changes in the organization’s total ticket revenue or other organization-level financial measures.
- The financial implications of audience building depended partly on the target audience selected. Indeed, from a strictly earned income perspective, some target audiences (those

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that attended less often and/or spent less on tickets than others) were financially disadvantageous relative to other audiences, at least in the short term.

- With respect to total attendance, we did find a relationship between changes in total numbers of bookers (i.e., those obtaining tickets for performances) and changes in total ticket revenue, and between changes in numbers of tickets sold and ticket revenue. However, we found no associations between changes in numbers of bookers, tickets sold, or ticket revenue, with changes in the organization-level financial measures examined such as revenue, net revenue, assets, and net assets.
- Few BAS projects expected or prioritized earned income gains, at least in the short term. These large nonprofit arts organizations instead pursue programming they see as key to artistic mission and try to generate audiences for this, whether or not such programming maximizes earned income or audiences. They look to philanthropy to sustain their efforts.

Implications and Questions

Study findings offer some general implications and questions for consideration for those pursuing their own audience-building efforts. Among the key ones:

- Organizations should clarify beforehand whether their goal is increased engagement by a particular audience per se or whether they view that audience as a means to expand overall attendance, because one may not yield the other, at least in the short term.
- External input is important for organizations to surface taken-for-granted and unfounded assumptions. So, too, is organizational openness to revisiting those assumptions.
 - Engagement with data can be helpful in surfacing assumptions.
 - Arts organizations can seek external feedback by speaking

with, and listening to, the people they wish to reach. Organizations may wish to consider whether a formal advisory group would be helpful.

- Organizations should frankly assess whether they seek to expand audiences or whether they seek to expand audiences strictly for their artistic priorities, because these can be in tension. Organizations can choose to do either or both but should not conflate the two.
- Organizations should consider the financial implications of audience-building efforts. Some audience-building efforts will likely require financial subsidy, rather than generating earned income to cover their costs. Identifying sources of subsidy is important, so organizations do not assume financial costs they cannot meet, which may negatively impact their financial health.

With respect to audience growth and trends in frequency of attendance:

- An important issue for future research is the prevalence of patterns of audience growth coupled with less frequent attendance observed in this study. The answer has significant implications for audience-building efforts. Under this scenario, organizations would need to attract many more audience members to fill the same number of seats previously filled with fewer audience members; find ways to attract deeper engagement; or find some combination of the two.
- If a large and growing percentage of audiences come for a production but do not move along the “escalator” to become frequent attendees, then audience-building strategies need to accept and incorporate infrequent attendees as just that, even as they also seek ways to more deeply engage those with the potential to be more deeply engaged.

As one BAS organization’s leader reflected, “We learned that we need to meet people where they’re at.” If organizations want audiences to engage differently with them, then organizations also need to engage differently with those audiences, be responsive to audience perspectives and concerns, and be open to changing themselves.

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Organizations' projects differed, as did the audiences they sought to recruit, which variously included millennial and Gen X audiences; more racially and ethnically diverse audiences; audiences for new and less familiar works; geographically-based audiences; infrequent attendees (hoping to motivate them to attend more often); and others. All organizations worked within the initiative's continuous learning framework, involving an iterative process of project design, analysis, and assessment of changes needed for improvement. Within that framework, many approached grant funding as risk capital for experimentation with new and varied approaches.

What insights do the results of their efforts and experimentation offer for other nonprofit performing arts organizations facing similar challenges? After awarding the BAS grants, The Wallace Foundation awarded a grant to The University of Texas at Austin to independently study the implementation and, for a subset of the organizations, outcomes of the organizations' audience-building projects. To provide an empirically grounded and multi-faceted account, the study included three major data collection efforts between 2015 and 2022: conducting hundreds of interviews with organizational leaders and staff; conducting audience surveys; and compiling data from organizational ticket databases.

When organizations completed their projects in 2019, little could anyone have imagined that performing arts venues would soon be shuttered by a global COVID-19 pandemic. As performing arts organizations have re-opened, the challenges of audience and financial sustainability remain all too relevant. We hope findings from this study and the initiative can help inform conversations about addressing these challenges.

That said, it should also be kept in mind that the BAS organizations were large, established nonprofits. Their issues clearly resonate more widely with comparable organizations but not necessarily for others.

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About the Organizations and the Initiative

The 25 organizations awarded grants in this initiative included a variety of performing arts organizations: theater companies, performing arts presenters, opera companies, symphony orchestras, and dance companies (see sidebar for further details). Virtually all organizations were independently incorporated nonprofit organizations, but a couple were units within larger public entities.

These were large, well-established organizations, with budgets in excess of one million dollars and often considerably more.³ Philanthropy is an important source of revenue for the organizations, though percentages varied among individual organizations. Their circumstances, perspectives, and issues clearly resonate more widely with other similar organizations but should not be assumed to apply for others that may have quite different orientations, challenges, and opportunities. Indeed, as much as these organizations and this initiative were focused on and face financial challenges, large established nonprofit arts organizations as a group have enjoyed considerable advantages, even as they increasingly face

The BAS Organizations

- Twenty-five Organizations:
 - Theater Companies (8)
 - Performing Arts Presenters (6)
 - Opera Companies (4)
 - Orchestras (4)
 - Dance Companies (3)
- All had annual operating expenses over \$1 million. More than half had annual operating expenses over \$10 million.
- Average organization age was 67 years. Median age of 51 years.
- On average, contributions and grants accounted for half of the organization's income (individual percentages ranged from under one-third to over two-thirds).
- Target Audiences:
 - Age (9)
 - Race (3)
 - Age and Race or Age/Race combination (3)
 - New and Unfamiliar Work (2)
 - Crossover between Diversified Product Lines (1)
 - Geographic (1)
 - Infrequent attendees (2)
 - Adventurous mindset (2)
 - Other (2)

questions about ongoing value and relevance.⁴ Those advantages and questions are relevant to their organizational, artistic, and financial sustainability and how they think about these. So, too, is the importance of philanthropy as a source of revenue for these organizations.

Although projects differed, all organizations used data collection and market research, which generally included a mix of focus groups, ticketing database analyses, and post-performance audience surveys. This emphasis on market research and data was central to the BAS initiative's continuous learning approach, which was characterized by an iterative process of design, implementation, analysis, and assessment

of changes needed for improvement. Most organizations used external consultants as part of their data collection effort, and The Wallace Foundation retained and assigned a market researcher to each organization.⁵

Another key part of the BAS initiative was that grantees focused their audience-building efforts and projects on a "target audience." The majority defined their target audience demographically, usually by age (seeking younger, millennial and/or Gen X audiences⁶), some by race/ethnicity, and in a few cases by a combination of the two. Other grantees defined their audience primarily in "psychographic" terms (mostly "adventurousness"), targeted infrequent attendees in the hopes of attracting them to attend more often, or sought to attract audiences to new and less familiar artistic work. One grantee hoped to promote crossover between the organization's diversified product lines, and one focused on residents from their nearby downtown locale.

About the Study and Study Data

This study employed multiple methods and data sources, conducting three major data collection efforts between 2015 and 2022. The report includes a detailed appendix that describes key characteristics of the data sources, data collection processes, data cleaning procedures, and survey weight construction. Apart from understanding the study's methodology, arts organizations may find the discussion of the challenges and opportunities of using ticket databases as a data source relevant to their own efforts. Here, we briefly summarize the three major data sources:

a) Three rounds of in-depth personal interviews with BAS organization leaders and staff between 2015 and 2022. In these 301 interviews, we explored how participants implemented their projects, their perspectives and experiences, and the relationship between audience-building efforts and broader organizational goals, values, and mission. Interviewees were assured that interviews were confidential, that our research was separate from grant

Who We Interviewed

We conducted three rounds of interviews with BAS organization leaders and staff. Round one was conducted in the initiative's early stages, and round two was conducted in the middle-later initiative stages. The third round, conducted after the project's conclusion, was initially launched in early 2020, but deferred until 2021 in the face of the COVID-19 pandemic. In all, between 2015 and 2022 we conducted 301 interviews with leaders and staff in a variety of positions at the twenty-five organizations (executive directors, artistic directors, BAS project managers—typically from the organization's marketing department, board heads, financial officers, and others suggested by the organization or engaged with that organization's project).

monitoring or reporting, and that individual interview results would not be shared with the Foundation (See sidebar for further details).

These interviews, part of the original research plan, provide rich qualitative data used in this report.

The study's scope later expanded to include two additional major data collection efforts (2018-2021). These efforts obtained quantitative data needed to independently assess whether audience gains were realized and to explore the financial implications of audience-building efforts. This "outcomes study" included a subset of 15 BAS organizations. The two types of quantitative data collected were:

b) Data from Organizational Ticketing Databases: We compiled information from ticket databases to analyze changes in organizations' total attendance and ticket revenue between 2015 and 2019; changes in (non-demographic) target-audience attendance between 2015 and 2019; ticket purchasing behaviors; and to draw samples of audience members for a short survey. These data yielded a rich and large source of data, without which we could not have assessed audience change. However, the technical challenges of these data collection efforts and using these data for research purposes were substantial and are described in the appendix.

c) Data from an Online Survey Administered to Samples of 2015 and 2019 Audiences: The short survey collected information on audience demographics, as well as frequency of, and reasons for, arts attendance. For each organization, we have two sets of survey data, one from the 2015 "pre" season and one from the 2019 "post" period. Survey data are used to assess changes in target-audience attendance for those with demographically defined target audiences. We also draw on survey data for other analyses (e.g., to explore the relationship between age and proclivity to attend new works). In all, the survey includes 9,563 respondents who attended in 2015, and 10,913 who attended in 2019.

Since we have interview data for all twenty-five organizations but have outcomes data for a subset of fifteen organizations, report findings and data are separated accordingly. We start by using interview data to consider project implementation, organizational perspectives, and experiences with different audience-building strategies among all twenty-five organizations. We then turn to the survey and ticket database data to examine audience and financial changes between 2015 and 2019 for the subgroup of fifteen. To help understand the quantitative patterns, we also draw on qualitative data for those fifteen organizations.

These rich and varied data enable the study to address the little-researched relationship between audience building and financial health in the nonprofit performing arts.⁷ It's a question of practical as well as theoretical interest, given the importance of organizations knowing whether they are embarking on a revenue-generating activity, an activity they need to

subsidize, or both. The data also revealed a picture of audience building that cautions against too easily accepting seemingly common-sense assumptions; advocating particular approaches without a realistic assessment of their costs and benefits; or judging success on the basis of a single effort.

This report brings together the quantitative and qualitative data, follows organizational project evolution over time, and compares this large number of case studies as appropriate. As rich and varied as our data sources are, limitations should also be kept in mind. The design of the initiative, whose grantees constitute our "sample," does not easily lend itself to determining causal connections. There is no comparison group, organizations generally employed numerous and overlapping strategies, changed strategies (and, in some cases, target audiences), and too few organizational cases are available for some comparisons (e.g., when an organization pursued a unique target audience). The challenges such factors pose should be acknowledged even as we explore the lessons to be learned from this initiative and rich source of data.

With this background, we turn to presenting our findings. The initiative explored Building Audiences for Sustainability—and we begin by exploring how the organizations themselves were thinking about sustainability.

Thinking About Institutional Sustainability in the Nonprofit Arts: Participant Perspectives

Organizational leaders and staff cared about institutional sustainability, the sustainability of their art forms, and attracting audiences. Yet there was often a seeming mismatch between the initiative's exploration of links between audience building and financial health and the organizations' target audiences and projects. Interviews reveal the reasons for this puzzling discrepancy and speak to how these nonprofit arts organizations think about sustainability and audience building. Among the key points:

- Many organizations did not expect short-term returns but were invested in long-term sustainability. From this perspective, audience building becomes an activity that requires short-term subsidy in the interests of long-term sustainability.
- Organizations question whether audience building can, or even should, be linked to financial sustainability through earned income.
- For large well-established nonprofit arts organizations, audience building poses a fundamental tension: Namely, to what extent can organizations expand audiences for what they want to present, and to what extent must the organizations change to attract more audiences?
- These nonprofit arts organizations believe that expanding philanthropy is as, if not more, central than earned income to building audiences and organizational sustainability.

- Most BAS projects were not focused on expanding audiences per se. Their goal was to build audiences for work the organizations value and see as integral to their artistic mission, but which may also be less popular with audiences.

These considerations are important parts of the framework that inform how organizations developed and carried out their projects. By the end of the project, many participants were questioning some initial assumptions and revising their original measures of success.

We turn to data from the interviews to elaborate.

Audience Building: Long-Term Sustainability versus Short-Term Returns

“This, to me, is not so much about increasing our revenue, as much as it is about creating a new audience. . . . This is one that’s more about, how do we make sure that we’re not going to lose this whole new generation?” This comment was made by the executive director of an organization that sought to expand millennial attendance. As his and many others’ comments indicate, participants did not generally expect to see substantial financial revenue from their target audience and projects, at least not in the short term. This was especially true in the case of organizations trying to attract younger audiences, which were the most frequently chosen target audience. In the eyes of many interviewees, younger generations have had little prior exposure to their art forms, or have many competing options for their free time, so more proactive efforts would be needed by their organizations to attract them. For instance, one opera interviewee said it’s important to connect with audiences before they are 50 to pique their interest, so “we just grab them enough within their current world . . . of entertainment consumption, in order that when they feel more comfortable in terms of the cost commitment . . . the way we present opera feels right to them.”

From the organizations’ perspective, the link between audience and financial sustainability is related to philanthropy as much as, if not more, than earned income from ticket revenue. According to this view, individuals move through a progression from new audience members to more frequent attendees (hopefully as eventual subscribers) and then to donors. As one marketing director said,

[I]t’s about being able to have a sustainable audience, which is obviously, to the ultimate financial benefit of your organization because if you can’t get the 20-somethings to start buying tickets and the rest of your audience is getting older, then your audience will diminish and your pool of potential donors will diminish . . . but it’s not like we’re saying in four years we expect to see this amount of incremental revenue.

From the organizations’ perspective, audience building becomes an activity that requires subsidy in the short term, in the interest of long-term financial sustainability. The question, however, is how often people actually progress along the assumed route? By the end of the initiative, some participants were questioning what one called “this old myth of the long slow escalator.” Instead, interviewees were asking whether at-

tendees really do progress from single-ticket buyer to frequent attendee to subscriber to donor.

Audience Building and Philanthropy

As we have seen, organizations also view audience building as part of growing a pool of donors. Attracting younger audiences was also characterized by some as counteracting perceptions of a lack of organizational vitality that is discouraging to current donors. Said one opera interviewee, “Every funder we talk to wants to see new, younger, more culturally diverse audiences coming.” Asked whether their BAS project to build younger audiences had contributed to financial health, the executive director of another organization said the hoped-for results in terms of earned income were disappointing. However, it did help their fundraising efforts, explaining:

Many times, if I was asking someone . . . to consider a gift, someone might say, “Well, when I come to the concert hall, there’s nobody young there. What on earth are you people doing?” And so we would point to this as something that we were doing. And they would say, “Well, it sounds like you’re working on this. That’s fine. I’ll make a gift.” So just the fact that we were doing something has been, frankly, it’s been very useful to help give donors more confidence.

A number of participants, especially toward the end of the initiative, questioned whether audience building ever would, or even should, be linked to financial sustainability through earned income. One organization’s programming to attract Gen X audiences included a production that actually generated higher earned income than typical performances. Still, over the course of the initiative this interviewee has come to feel, “I don’t necessarily know that our answer lies in building audiences. . . . [Our] single-ticket sales rose. . . . We’ve seen an uptick in subscriptions. . . . Ticket sales will not outpace the expense and the cost of running a symphony orchestra. They only contribute. . . . And it is not outpacing the need for contributed revenue.” This interviewee quipped, “This initiative . . . should have been called Building Revenue to Sustain Audiences.” The emphasis on contributed income was not unique to those focusing on a millennial or Gen X age target. For instance, an interviewee from an organization whose project did focus on generating earned income by promoting cross-over among its diversified artistic product lines, concluded at the end of the initiative that significant earned income is not achievable and that “the future for us all depends upon growing contributed revenue.”

But philanthropy is also critical to these nonprofits’ vision of sustainability because of *what* they want to sustain, *for whom*, and *how*, to which we now turn.

Audience Building for What?

Most BAS projects were not focused on expanding audiences per se. Instead, their goal was to build audiences for work they value and see as integral to their artistic mission. This is illustrated by the organizations that focused on attracting audiences to particular types of artistic work, which typically drew

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smaller audiences and generated less revenue. For instance, one performing arts presenter has a series of Broadway musicals that generates considerable income. Their BAS project, however, focused on one of their smaller series “about risk and innovation.” The interviewee emphasized, “We don’t expect to make money on that. . . . You know, if we break even, that would be a miracle. Otherwise, we just know we support that through the fact that . . . we’ve got a Broadway series, and we take those funds and support our education program and [this] series with that.”

Another organization’s project sought to build audiences for new and less familiar work. The executive director emphasized that mission, not financial sustainability was the priority: “It’s the people coming, because it’s about mission.” Furthermore, this interviewee said that mission included making tickets affordable. Thus, addressing a question about whether price had been a barrier to attendance, the director said: “Price never came up. And it shouldn’t. We are in a subsidy model. I work very hard as a fundraiser. Our tickets are affordable. . . . You don’t have any money? . . . The final dress rehearsal, we will bring you, as our guest.” Another organization wants “to experiment with unshackling audience growth from earned revenue growth.” The organization is developing an initiative “to dramatically subsidize the cost of tickets, through contributed revenue.”

From one perspective, then, we can see audience-building projects as deeply mission driven and trying to expand the audiences for organizations’ missions and for their art forms. But this also means there is a tension built into their audience-building approach. Specifically, can the organization build target audiences for what they want to present in the way they want to present it? Or does the organization itself need to change in order to attract audiences?

The challenges between these runs throughout project design, implementation, and choices, starting with the strategies adopted to build audiences, to which we now turn.

Strategies for Building Audiences

The twenty-five organizations engaged in many different strategies to build their audiences. Many of them felt a benefit of the BAS initiative was that it provided them with “risk capital” to try different things, since “failure” was accepted as part of the continuous learning process (rather than prompting cancellation of the grant). As part of that process, organizations all used data and market research to inform their efforts. The fact that so many organizations engaged in large numbers of activities makes it difficult to identify the role and impact of particular activities. However, looking across the experiences of this large group of organizational cases, we can identify: strategies that organizations consistently found productive; strategies that organizations consistently found unproductive; and strategies that organizations experienced differently, depending on their organizational circumstances and audience-building goals.

After providing an introductory overview of organizations’ audience-building activities, we will discuss three common strategies. First, shifting marketing content and vehicles exemplifies a strategy that organizations consistently found

productive. Second, use of “crossover” exemplifies a strategy that organizations consistently judged to be unproductive. And third, performing at offsite venues is a strategy that elicited different reactions, depending on organizational goals and circumstances.

What the Organizations Did

We asked interviewees to rate multiple activities on a scale of 1-5, according to how major a role the activity played in their organizations’ audience-building project. Table 1 shows the percentage of organizations rating each activity as major (4 or 5). On average, organizations rated fully 8.5 activities as major parts (4 or 5) of their project.⁸ Some assigned a 4 or a 5 rating to as many as 12 different activities. Organizations did indeed engage in many activities. With this background, we turn to discuss the organizations’ experiences with three common strategies: Changing Marketing Content and Vehicles, Crossover, and Performing at Offsite Venues.

Strategies: Changing Marketing Content and Vehicles

Expanding or changing their marketing content was cited as an important activity by virtually everyone. Key takeaways:

- Organizations learned they were communicating in ways that may have been meaningful to those in the arts, but that did not resonate with others they hoped to reach. Engaging with data gave organizations the external feedback that helped them recognize this problem.
- Organizations consistently found revising their communications to be more welcoming, informative, and responsive was a productive approach.
- Finding ways to inform audiences about what to expect from a production was one important theme, particularly for productions of new and less familiar works.
- Some organizations found that creating video trailers was a helpful strategy in overcoming some of the challenges. In general, organizations found expanding their use of online communications important.

Repeatedly, and often through market research, organizations learned they were communicating in ways that reflected their values and using language that may have been meaningful to those in the arts—but that did not resonate with audiences they wished to reach. The consequences were communications that undermined, rather than facilitated, the goal of attracting new audiences. Two key examples:

- Communications that omitted information audiences wanted to make decisions about whether to attend a production.
- Communications that conveyed an unwelcoming tone.

Once identified, organizations were able to make changes. For example, one performing arts presenter learned:

Table 1
Percent of BAS Organizations Rating
Activities as a Major Part of Their
Audience-Building Project

Audience-Building Activities	%
<i>Expand or change marketing content</i>	91
<i>Offer new/different artistic programming</i>	74
<i>Expand or change marketing outlets</i>	70
<i>(e.g., more digital, social media)</i>	
<i>Try to raise organization’s visibility</i>	70
<i>Encourage crossover between programs</i>	65
<i>Offer new/different opportunities for</i>	57
<i>artist-audience interaction</i>	
<i>Try to change organization’s</i>	57
<i>image or reputation</i>	
<i>Work with community organizations</i>	52
<i>Offer other ancillary events</i>	48
<i>Offer lower ticket price</i>	43
<i>(e.g., lower prices, discounts, BOGO offers)</i>	
<i>Try new types of subscriptions/passes</i>	43
<i>Offer social events</i>	43
<i>Offer pre- or post- show discussions</i>	43
<i>Perform at venues other</i>	39
<i>than your standard ones</i>	
<i>Offer customary artistic</i>	22
<i>programming in new format</i>	
<i>Change how frontline staff</i>	22
<i>(e.g., ushers, box office) interact w/audiences</i>	
<i>Use a special advisory committee</i>	17

Note: Activities were rated on a 1-5 scale where a 1 means the activity was not at all a part of their audience-building effort and a 5 means the activity was a major part of their effort. Percentages are the percent rating an activity 4 or 5.

Read as follows: 91% of organizations rated expanding or changing marketing content as a 4 or a 5.

Images that we thought, from years of being in the arts, were the most appealing . . . really meant nothing to many of the audience members. . . . They were replications of our own beliefs. . . . We always put forth the notion of the art and the aesthetic. And for many of the audiences we were trying to reach, price was much more important. Now we just say upfront, “This is what it costs.” . . . That was one of the most important lessons that we learned.

To take another illustration: One dance company hoped to attract new audiences through informational and educational programming. The problem? They realized their communications about these programs “were really geared towards...people that were very familiar with both the art form and what [we] offer.” But one thing they learned from focus groups: “Nobody wants to be talked down to about what they know or don’t know about the art form.” They altered communications about the programs to “make sense to people who maybe hadn’t been around a ton of [dance].”

Recognizing and changing communications was a prominent theme among those seeking to engage audiences for new and less familiar work. One such organization, a theater, initially adopted a strategy built explicitly around attracting people to new works or world premieres. Why? One interviewee explained they “had always operated under the assumption, perhaps narcissistically in [our] industry, that there was a real cachet about world premiere...and that that was something that would be intriguing and attractive to audiences. We found that was completely wrong.” They realized this through engaging with data and the external feedback it provided. That included focus groups and seeing low levels of audience interaction with a website the organization created to publicize new work.

The organization abandoned that strategy and started to explore alternatives. One approach the organizations did find effective: Providing information to help people understand what to expect from a production. Asked one interviewee rhetorically:

Who would go to a new restaurant without checking online to see what the experience was going to be? And we realized that from the consumers’ perspective, they’re thinking about the theater in the same way. So they really wanted to know; okay if I go to see this play, what kind of experience will I have?

One strategy this organization found helpful: Creating video trailers, akin to movie trailers. These trailers were intended to let audiences know what type of experience they could expect, hopefully encouraging them to think it would be worthwhile to attend. The organization distributed trailers, for instance, through their social media outlets.

While a relatively small number of organizations spoke of using trailers, those who did found it extremely productive. Further, the applicability of using trailers extends beyond organizations targeting audiences for new and unfamiliar work.⁹ For instance, an organization that focused on attracting younger and more diverse audiences adopted trailers as a key strategy. One interviewee said, “We have a video trailer

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for every show now.” For musical performances, they find these trailers and playlists “help really tell people more about the art form and have them more involved.” Whether or not a production is new, it may well be new to audiences the arts organization is trying to attract, and the trailers thus fill a similar role.

Still, whether using trailers or any other vehicle, organizations still need to attend to whether communications convey the intended message. Here, external input proved important and research can help. One organization for instance, used videos to promote events at the organization oriented to younger audiences but met with initially disappointing results. Focus groups revealed that in the video, the organization and the events came across as “bougie.” Far from the informal, welcoming feel the organization hoped to project, the intended audience found it off-putting. The organization changed its approach, letting the younger attendees speak for themselves: “Rather than someone telling you why you should like coming, we sort of flipped it to; here are people in their own words saying why this is something exciting to them and fun for them.”

As illustrated by the example of trailers, a majority of organizations also expanded or changed their marketing vehicles. Generally, this change included making greater use of digital communications. These organizations’ use of trailers was one example, but there were others:

- An organization was able to send targeted emails and ads about price discounts for younger audiences directly to younger audiences. For them as well as others, a perceived advantage of expanding digital communications was that it allowed the organizations to communicate in different ways with different audiences.
- An organization transformed its website to be more mobile-friendly.
- An organization used social media to get the word out about pop-up concerts it held around the city.
- An organization revamped its website to be more accessible, and then used Facebook marketing to attract people to various pages on that site.
- Organizations used emails to send links to the video trailers discussed earlier.

Expanding marketing vehicles was not, however, without challenges. Some organizations hired staff to bring needed expertise in this area. And some emphasized the need to be thoughtful about where to invest efforts most productively, given limited financial resources and staff time.

Reflecting back, one interviewee said you need to reach people where they are, which may be through social media or through community institutions. This interviewee said:

We’ve learned how to reach our audiences differently. . . . We have learned that people will come for their own reason to a program, not for our reason. . . . Like one of my marketing people says, “You have to

hunt where the ducks are.” We learned how to go to the ducks.

Strategies: Crossover

Most BAS organizations (65 percent) said that a crossover strategy played a major role in their audience-building efforts. This strategy involved offering special programming to attract the target audience, in the hopes that the target audience would then cross over and attend its main programs. Key takeaways:

- Organizations repeatedly concluded that crossover strategies did not produce the hoped-for crossover outcomes.
- Some organizations came to value special programming even though hoped-for crossover did not occur. Instead, they embraced the programming for attracting new audiences and for expanding artistic programming.

A few examples illustrate the strategy, its challenges, and why some organizations found alternative value in strategies originally intended to produce crossover.

Example: A Symphony Orchestra’s Crossover Strategy to Attract Millennial Audiences. A symphony orchestra developed a new genre-crossing series where orchestra musicians played with indie artists, in the hopes that millennials would attend and then go on to attend main season programs. As one interviewee said, “We really thought this was going to be a gateway drug for millennials to come to . . . some more core product. . . . That really didn’t happen.”

Yet the organization remained committed to cross-genre programming for other perceived value. The interviewee just quoted went on to say part of the organization’s learning was that “having a series, a space where millennials feel comfortable coming to the [hall] is enough.” Some also noted the programming helps make the organization more relevant. One interviewee, for instance, believes that a “21st century symphony” is one that offers a diversified program that includes traditional classics, but other things as well, such as genre-crossing performances, jazz, and showcasing local artists. The orchestra continued the cross-genre programming, making it part of the main season. It also made changes to center the orchestra more during performances and broadened the focus from an age demographic to people interested in this type of programming.

Example: An Opera Company’s Crossover Strategy to Attract Younger and More Diverse Audiences. An opera company coupled food with musical performances in restaurants around its geographical area. Several interviewees praised this effort, but as one interviewee noted, the organization also shifted its expectations, to value attracting new audiences even if they do not cross over to mainstage productions. One opera interviewee reflected:

I think in our naivety, we thought; well, we'll convert 70 percent of these new audiences into mainstage ticket-buyers. . . . Like we see them in a restaurant, and then they'll buy a ticket to a three-hour opera, and come sit in the dark with us. . . . We had to get comfortable with the idea that that's a separate line of business. . . . The more we did that, the more we realized that the conversion to the mainstage . . . was not necessarily the metric of success, that engaging with them in the form that they wanted to experience the art was okay, and that it still expanded the art. It still expanded the audience.

The organization planned to continue the series for its perceived value in attracting new audiences, in raising awareness about the company, and as a vehicle for engaging people outside of its performance season.

These two organizations and others found alternative value in programs originally intended to produce crossover, but that was not always the case. Some organizations concluded the programming was not attracting even the target audience or experienced no real connection between the special programming and the organization's identity or goals. In such cases, programming was discontinued. It is important to note that even when organizations did embrace the value of new programming, real challenges remain; a significant one being financial sustainability.

In sum, organizations' experiences caution against crossover expectations, while suggesting other benefits of diversified programming and formats. To realize these, however, organizations may need to embrace new ways of doing things and also find ways to meet very practical financial and other challenges involved.

Strategies: Performing at Different Venues

A substantial number of organizations (39 percent) reported that performing at venues beyond their traditional venue was among their major audience-building activities.¹⁰ Key take-aways:

- Organizations consistently reported considerable challenges performing at offsite venues.
- Organizations found offsite performance helpful when seen as offering distinct advantages for achieving artistic and/or community engagement goals.
- Organizations did not find performing offsite a productive way to attract audiences to mainstage productions.
- Some organizations discontinued offsite performance activities but instead found value in making changes to their home venue.

The following examples illustrate these varied experiences:

Example: A Theater Presents Immersive Performances Offsite. A theater felt that to achieve its artistic and audience engagement goals, it was very important to present its immersive performances in offsite venues. Still the organization ex-

perienced considerable challenges adapting these non-theater venues (e.g., a warehouse) for performance. Among the myriad challenges: ensuring an adequate power supply, fire safety, loading a set away from the shop, and obtaining necessary permits. Since the theater perceived the offsite venues as essential to their goals, they persevered, experimenting with different venues and learning more. One interviewee explained:

Despite all of the challenges and headaches of a space that is not set up for theater, we have seen the many advantages artistically of the creativity that can come and the uniqueness of an experience you can deliver in a space where people don't expect the performance, and also to be in different neighborhoods and engaging with different communities, and in different types of buildings that bring a whole story with them. . . . And despite the cost and the headache, we are committed to continuing to do work offsite because it's really exciting and it opens up a lot of new possibilities artistically and in terms of community and audience engagement.

Over time, the organization learned more about the type of venue best suited to its purposes. The organization's offsite performances continue. They have looked for ways to scale up their shows to make them more financially viable, while retaining the personal experience (e.g., through introducing timed entry).

By contrast, in other cases, organizations did not perceive a compelling and distinctive link between offsite performance and their artistic goals and/or organizational identity, so they discontinued the strategy. The next example illustrates this latter scenario.

Example: A Symphony Orchestra's Offsite Experimental Music Series. A symphony orchestra presented an experimental musical series in small offsite venues, such as nightclubs, instead of its large hall. The organization reported a number of challenges: additional expense, working with different sound systems, and difficulty booking rehearsal time. In the end, the organization concluded the effort did not further organizational goals, which included attracting more people to mainstage performances. One interviewee explained: "What we learned was you can't transfer somebody from one destination to another." They discontinued this offsite series.

This organization, however, does value performing offsite. One interviewee said they recently presented a free outdoor concert series to large crowds. In this case, they had no expectations that audiences would cross over to their home venue and felt the undertaking was more closely aligned with their identity. The interviewee explained that now when they perform in community venues, "we've tried to be smart about it, and also very intentional about who we are, and not try to be somebody else that's cooler."

Example: An Opera Company and a Performing Arts Presenter Adapt Their Home Venues. An opera company's audience-building project experimented with different ways of putting art on stage, including presenting chamber opera in smaller spaces around town. One interviewee reflected posi-

tively on the offsite venues, but said the undertaking proved costly, and the organization learned “it was really complicated to go to outside venues for us. We are a really big behemoth. We do not bend and flex easily.” They continued chamber opera but moved it to a newly completed, smaller, onsite venue.

Similarly, others adapted home venue space in lieu of offsite performance. A performing arts presenter with a large performance space wanted a smaller, more intimate venue for its more adventurous programming. An interviewee explained that they initially tried presenting in smaller offsite venues but failed to attract more audience. Instead, they “got a little innovative in regard to our space,” creating the more intimate atmosphere they sought through a combination of closing off sections with fabric (similar in color to their walls) and lighting.

In the literature, performing at offsite venues has been proposed as a strategy to attract new audiences and deepen community engagement.¹¹ BAS organizations’ experiences indicate, however, that such efforts may be more challenging than they may seem with respect to logistics, staff, finances, and in some cases, existing union agreements. Some discontinued their efforts, feeling the benefits were too little to justify the costs. When organizations perceived the strategy offered distinct advantages to achieving their goals, they found it a challenging, but productive, strategy indeed.

Enlarging Audiences: Project Outcomes

Did organizations see gains in their target audiences? And if so, what were the financial implications? In this section, we address these questions for the fifteen BAS organizations in our outcomes study. Table 2 summarizes the target audiences pursued and the number of organizations that saw audience gains. We present findings for BAS project results for each of the target audiences. As a whole, we find:

- Most (ten of the fifteen) organizations in the outcomes study saw target-audience gains, though often more modest in size than initially hoped.
- Organizations with a demographic target were not more or less likely to see target-audience gains than those with a non-demographically defined target audience.
- Enlarging the number of target-audience members was more readily accomplished than engaging them as frequent attendees.
- Given that most organizations chose target-audience members who were a small initial presence in their audience, even dramatic audience gains generally did not impact overall attendance.
- We did not find associations between changes in target-audience attendance and overall audience gains or between target-audience gains and organization-level measures of financial health.
- The financial implications of audience building partly de-

Table 2
Target Audience Definitions and Numbers of Organizations that Saw Audience Gains

Target Audiences: Outcomes Study Organizations	# BAS Orgs	# Expanding Target Audience
Demographic:	9	6
Age	6 *	5
Race	4 *	2
Non-demographic:	6	4
New and unfamiliar work.....	2.....	2
Crossover\Diversified product line	1.....	1
Geographic.....	1.....	1
Infrequent attendees (to increase their attendance)	2.....	0
TOTAL ORGS	15	10

*One organization pursued two target audiences (age and race) and is counted in both categories.

pend on the target audience selected. From a strictly earned income perspective, some target audiences (that attended less frequently and/or spent less on tickets) were financially disadvantageous relative to other audiences.

- Smaller organizations less often saw target-audience gains.
- Special programming to attract audiences met with mixed results, but in some cases different (for the organization) programming proved successful in attracting larger numbers of target-audience members.

Our individual discussions of results for each target audience are guided by a similar structure and approach, though different data sources are used to assess the demographic and non-demographic outcomes. We begin by summarizing that approach and then turn to discussion of demographic outcomes, followed by discussion of non-demographic outcomes. We then step back to examine target-audience changes in relation to overall audience changes and measures of financial health.

Our Approach

To assess whether or not target-audience gains occurred, we compare the target-audience presence before and after (pre and post) BAS initiative projects. We chose the 2014-2015 main season (hereafter the “2015 season”) as the “pre” period since it was the season immediately prior to the start of the BAS initiative. We chose the 2018-2019 main season (hereafter the

Why “bookers”?

We refer to “bookers” throughout this outcomes study discussion. “Bookers” are those who obtain tickets from the arts organization for themselves and others (such as friends or family they attend with). Bookers are the ones stored in ticket databases and are typically the part of the audience known to arts organizations.

“2019 season”) as the “post” period since BAS projects concluded that season (it also proved to be the final season not impacted by COVID-19 closures). We intentionally focus on audience composition for the overall main season because the BAS initiative sought to *attract and retain* audiences, not just produce “one off successes.” Analyses that do not consider the season as a whole risk mistakenly drawing conclusions based on performances or productions with atypically high or low attendance.

Next, for organizations that expanded their target audience, we analyze the financial implications of those gains.

Some organizations developed special series as part of their audience-building projects. In those cases, we analyze the special series separately, whether or not they were part of the organization’s main season. Since most of these series did not exist before the initiative, the comparison here is not “pre” versus “post” initiative – but looks at whether the special series attracted more of the target audience than other productions.

The overarching approach is the same, but there are some differences to note in the data and quantitative analyses of demographic versus non-demographic target audiences:

- Analyses of demographic target audiences use our survey data, which are based on samples of “bookers” (see sidebar). Since these are samples, we use weights to align the samples back to the population from which they were chosen, correcting for nonresponse bias and differential probabilities of selection (see Appendix for details). We also use tests of statistical significance to assess whether observed changes (e.g., whether the number of target-audience members was greater in 2019 than in 2015) may be due to chance. Findings are considered statistically significant if p-values are below the .05 level, meaning there is less than a 5 percent chance that the observed difference is due to chance (i.e., we can be 95 percent confident that the observed difference actually exists in the population).
- Analyses of non-demographic audience changes use data drawn from ticket databases. These analyses include the entire population of bookers and tickets, and, therefore, we do not use weights or employ tests of statistical significance.

Our quantitative analyses tell us whether changes occurred and, in some cases, also permit us to assess certain assumptions (e.g., about age differences and attendance at new works). We conclude each section by turning to our interview data to examine instances of organizations that saw audience gains for suggestive insights about why particular efforts may

have been successful, and to understand the organization’s evolution toward the outcome. Taken together, the data also provide insights into the relative costs and benefits of certain audience-building approaches – and into why even some organizations that saw target-audience gains had mixed assessments about their success.

While we caution again that the initiative design does not lend itself to establishing statistical causality, the consistency of some of our findings across target groups, organizations, and between the quantitative and qualitative data, yield particular results that should help inform future organizational efforts and expectations of organizations seeking to build audiences.

Demographic Target-Audience Outcomes

We begin by considering whether audience gains were realized by organizations that defined their audience in demographic terms starting with age, followed by race.

Target-Audience Outcomes: Age

As was true of the initiative as a whole, the largest number of outcomes study organizations (six out of fifteen) focused on an age-based target audience. Broadly, all focused on attracting millennial audiences, Gen X audiences, or both (specific age ranges varied and are identified later in this section). Organizations with an age-based target audience were: two symphony orchestras, two theater companies, one opera company, and one dance company.

Why did so many focus on age? The overarching reason was that organizations sought younger audiences to replace their aging current audiences. Many also linked their choice to local demographics. In the case of millennials, some interviewees pointed to the generation’s large size. For instance, one theater focused on millennials “because they were the largest demographic bubble that this city was experiencing.” On the other hand, some organizations favored Gen X because they saw members of that generation as having a greater potential to become donors than millennials. For instance, one symphony considered both millennials and Gen X but “skewed towards Generation X, just because . . . that’s the group most likely to become donors.” Their early market research findings also suggested that Gen X residents were more likely than millennials to settle long term in the community.¹²

Key findings:

- Between 2015 and 2019, most (four of the six) organizations with an age-based target audience saw main season target-audience gains, as a percentage of their bookers and/or as a percentage of their audience. At a fifth organization (where differences between the two years just missed statistical significance), the organization’s special, non-main season series attracted a significantly higher percentage of its Gen X target audience than did its main season productions.
- Since the target-age audience had a small starting presence (in 2015), target-audience gains generally did not impact the organization’s total attendance.

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- Organizations pursued younger audiences in part to replace older ones. However, since the younger target audiences generally attended less often than their older counterparts, the organizations would need to recruit larger numbers of younger audience members just to replace older ones.
- From a strictly earned income perspective, younger target audiences, who generally generated less ticket revenue, were clearly less financially advantageous than older ones, at least in the short term.
- Most (five of the six) organizations offered special productions or series they believed would be particularly attractive to their age-based target audiences, with mixed results.
- Our findings suggest that special programming can be effective but caution against making assumptions about programming preferences based on age.
- The most successful special series, in terms of the high percentage of the intended target-age group attracted, offered distinctly different programming in both content and format than the organization’s traditional productions.

- Pooling our data across all fifteen organizations, we find some associations between audience member age and the reasons they offer for their performing arts attendance: Millennial (or younger) and Gen X respondents were significantly more likely than older respondents to cite low-cost or free admission and wanting to socialize with friends and family as reasons for their 2019 performing arts attendance.

Changes to Target-Age Main Season Attendance.

We examine changes in target audience in two ways: first as change in the percentage of all bookers and second as a percentage of audience (using two different sets of survey weights).¹³ As Table 3 shows, only one of the six organizations (Organization C) saw statistically significant gains between 2015 and 2019 in its target-age group as a percentage of all bookers. At a second organization (Organization F), Gen X target-group gains just missed statistical significance but are significant when we compare Gen X or younger bookers to others.¹⁴ This analysis gives all respondents an equal weight in the analysis, regardless of how often they attend productions.

But what if we do give respondents different weights in the analyses, depending on how often they attend, to assess

**Table 3
Main Season Target Audience Attendance, 2015–2019:
Six Organizations with an Age-Based Target Audience**

Organization	Target Age Group	2015/2019 Survey N	Target Age Group as a Percent of Bookers			Target Age Group as a Percent of Audience		
			2015 %	2019 %	Percent Change 2015-2019	2015 %	2019 %	Percent Change 2015-2019
A	25-39	703/744	11.46	16.29	42.10	7.32	14.80	102.16***
B	Gen X (1965-1980)	213/278	8.53	13.89	62.74	3.71	11.62	213.05***
C	Gen X & Millennials (1965-2000)	476/545	15.76	21.27	34.96*	12.71	18.49	45.51*
D	25-40	767/991	10.23	14.33	40.01	8.42	11.59	37.67*
E	25-40	631/661	20.99	21.68	3.31	17.72	19.12	7.94
F	Gen X (1965-1979)	813/955	14.96	20.00	33.62	14.93	16.49	10.51
F	Gen X or Younger	813/955	23.36	35.02	49.87***	21.58	26.77	24.05*

Source: The University of Texas at Austin Building Audiences for Sustainability Research Study survey.

Notes: Missing data are minimal for all organizations (the highest amount of missing data is 0.28% for one organization's 2015 sample).

Figures for target age group as a percent of bookers are booker weighted, and figures for target age group as a percent of audience are production weighted (see Appendix).

Read as follows: For Organization A, based on 703 survey respondents in the 2015 sample and 744 survey respondents in the 2019 sample. At Organization A, the target audience (25-39-year-olds) comprised 11.46% of those who obtained tickets to one or more main season productions in 2015, and 16.29% in 2019 (an increase of 42.10%). As a percent of audience, in 2015 the target age group comprised 7.32% of the season audience and 14.80% of those in 2019 (an increase of 102.16%).

*p<.05, **p<.01, ***p<.001

changes in who is actually “in the seats” over the course of the season? To contrast this approach with the one above, imagine that 15 percent of an organization’s bookers are 25-40 years of age. In one scenario, this age group attends an average of one production during the season, but in another scenario, members average four productions. The percentage of all bookers who are 25-40 years old is 15 percent either way. However, in the second scenario, 25-40-year-olds will be a larger percentage of total season audience because they attend more often. Viewed this way, as Table 3 shows, four organizations exhibit statistically significant increases in the target-age group as a percentage of the audience between 2015 and 2019 (with the fifth again significant when we combine its Gen X target or younger audience). Why would this be? These findings are more complicated to interpret than simple changes in the percentage of bookers and can result from multiple scenarios.

Ideally, from an organization’s perspective, target-audience members would become a larger portion of those in the seats because they are attending more often. However, target-audience presence can increase either because the target audience is attending more frequently, or because the older (non-target audience) is going less frequently, or some combination of both. As Table 4 shows, for instance, at Organizations A and B, the frequency of attendance by the target-age group and other audience members was converging because the average number of productions attended increased for the target group but decreased for the non-target audience.

Organization C, with its combined millennial and Gen X audience, well-illustrates the complex nature of audience changes and assessing them. This was the sole organization to see significant gains in its target-age audience as a percentage of all bookers. The target audience, however, did not attend more often in 2019 than in 2015, while the non-target audience saw a modest, but statistically significant, decline in average frequency of attendance. However, the non-target audience was still attending significantly more productions than younger audiences (2.05 versus 1.72). Thus, Organization C would need to get an even larger number of target-audience members to fill the same number of seats filled by a smaller number of the non-target audience.

This fact was not lost on the organization. One interviewee recalled that through the project, they “were going to seek to fix our leaky bucket. . . . We did not fix the leaky bucket.” They increased audience but did not find “a sustainable fix,” though perhaps “some techniques that seem to move the needle.” While not sure, this interviewee thinks that were they to do their project again, the organization might try to attract a more inclined-to-attend audience because:

We don’t just need to solve the 50-year problem. We need to solve the 10-year problem. And a healthy movement of getting more already arts-inclined older people in the doors might also be a really worthy thing to study. I’m just not sure it’s as sexy a thing to talk about.

Financial Implications of Age-Based Target-Audience Gains. As previously discussed, organizations that focused on younger target audiences generally took a long-term view with respect to expectations of financial return.

Whatever may happen in the future, in the short term, from a strictly earned ticket revenue perspective, younger target audiences were clearly less financially advantageous relative to older ones for these organizations. As Table 5 shows, target-audience members on average generally bought fewer tickets, paid a lower average price for tickets, and spent less overall in the season on tickets.

Special Series to Attract Age-Based Target Audiences. As part of their audience-building strategy, some organizations developed series they felt would be particularly attractive to their younger target audience. This was a particularly common strategy among those with a target-age group: Five of the six organizations with an age-based target offered special productions. Sometimes these productions were included as part of their main season and sometimes outside of the main season. Generally (at least initially) organizations hoped the target audience would be attracted to these special series and then go on to attend other traditional main season offerings.

Did, however, such special series attract more target-audience bookers? To address this question, in Table 6 we compare target-audience members as a percentage of special series’ bookers with target-audience members as a percentage of main season bookers (or, if the special series was part of the main season, we compared it to the rest of the main season). As Table 6 shows, the results were mixed:

Table 4
Frequency of Target and Non-Target Audience Attendance in 2015 and 2019: Organizations that Expanded Their Target Age Group as a Percent of Main Season Audience

Org	Target Age Group	Total Productions Non-Target		Total Productions Target	
		2015	2019	2015	2019
A	25-39	3.43	2.77***	2.09	2.48
B	Gen X (1965-1980)	2.53	2.33	1.05	1.90**
C	Gen X/Millennials (1965-2000)	2.29	2.05**	1.78	1.72
D	25-40	2.29	2.32	1.85	1.82
F	Gen X (1965-1979)	2.25	2.41	2.24	1.90

Sources: The University of Texas at Austin Building Audiences for Sustainability Research Study survey and organizational ticket databases.

Read as follows: At Organization A, the non-target audience attended significantly fewer productions in 2019 than in 2015 (2.77 versus 3.43). The target audience attended more productions (2.48 versus 2.09), but the change was not statistically significant.

*p<.05, **p<.01, ***p<.001

Table 5
Target vs. Non-Target Age Group Ticket Purchasing Behavior at Organizations that Expanded Their Target Age Audience: 2019 Main Season

Org	Target Age Group	Total Tickets Obtained		Total Spent on Tickets		Average Paid per Ticket		Total Productions	
		Non-Target	Target	Non-Target	Target	Non-Target	Target	Non-Target	Target
A	25-39	5.92	4.49*	221.42	98.38***	37.00	28.92*	2.77	2.48
B	Gen X (1965-1980)	5.00	4.14	211.47	158.20*	44.78	38.48	2.33	1.90
C	Gen X / Millennials (1965-2000)	4.21	3.82	304.21	184.99***	70.88	50.98***	2.05	1.72**
D	25-40	5.55	4.47**	259.24	114.6***	46.75	25.35***	2.32	1.82**
F	Gen X (1965-1979)	4.75	3.94*	209.50	187.40	46.48	48.84	2.41	1.90***

Sources: The University of Texas at Austin Building Audiences for Sustainability Research Study survey and organizational ticket databases.

Read as follows: On average, those who were not part of the 25-39-year-old target group obtained 5.92 tickets for main season productions, spent a total on average of \$221.42 on

season tickets, paid an average of \$37.00 per ticket, and attended an average of 2.77 productions. The comparable figures for the target audience age group were 4.49, \$98.38, \$28.92 and 2.48.

*p<.05, **p<.01, ***p<.001

- At three of the five organizations, the target-age group comprised a higher percentage of special series bookers than for other main season productions.
- At two of the five organizations, the target-age group actu-

ally comprised a lower percentage of bookers.

- Taken together, the results offer a caution about making assumptions about differential programming appeal based on age.

Table 6
Target Age Audience Attendance at Special Series and Other Main Season Productions in 2019: Organizations with an Age-Based Target Audience and Special Series

Org	Target Audience Age	N of Respondents Series/ Other Main Season	Type of Special Production	Target as % of Special Series Bookers	Target as % of Other Main Season Bookers
A	25-39	106/744	Non-Main Season	23.37	16.29
B	Gen X (1965-80)	89/278	Main Season	18.64	13.89
D	25-40	723/991	Main Season	10.52	14.33
E	25-40	45/661	Non-Main Season	11.57	21.68
F	Gen X (1965-79)	188/955	Non-Main Season	34.47	20.00
	Gen X (1965-79) or Younger			63.47	35.02

Source: The University of Texas at Austin Building Audiences for Sustainability Research Study survey

Notes: Since respondents can be in both comparison groups, tests of statistical significance are not included. In cases where the special series were outside the main season, comparisons are to main season. If the productions were part of the main season, comparisons are to other main season productions.

Read as follows: Organization A's target audience (25-39-year-olds) were 23.37% of all bookers to its 2019 (non-main season) special series and 16.29% of its main season bookers. Analyses based on 106 survey respondents who attended the special series and 744 respondents who attended other main season productions.

Organization F's special series stands out for attracting an atypically high percentage of the younger target audience, and we turn to examine it at greater length.

A Theater Creates a New Series and Attracts Younger Audiences. Organization F's special series attracted a strikingly higher percentage of its Gen X target audience than did its main season productions (and, for that matter, than any of the other four organizations' main season or special series). Taken together, Gen X and younger (mostly millennial) audiences accounted for a *majority* of the special series bookers and almost twice the percentage of main season bookers. Furthermore, other analyses suggest that Organization F's special series was attracting new Gen X bookers: Fewer than six percent of the Gen X bookers in our survey attended both a main season and a special series production. And, the fact that the percentage of main season Gen X bookers modestly increased between 2015 and 2019 (see Table 3), additionally suggests that the special series attracted new Gen X bookers rather than simply taking audience away from the main season.

Interviews with organizational leaders and staff permit us to better understand what the organization did in this atypical case and glean insights as to what contributed to the attractiveness of this particular series. It also yields a surprising finding that illustrates the complexity and tradeoffs of audience building: Even with their seeming success, interviewees offered more mixed assessments of their project success. This case illustrates two points that were also observed at other organizations:

- The special series that attracted the younger target audience offered substantially different types of programming in a substantially different format than its main series.
- The series proved more successful in attracting target-audience members than in cultivating their ongoing attendance and engagement with the organization.

To elaborate on these points, we turn to interviews with those from the organization to understand what they tried to achieve, what they did, and their assessment of the results.

According to interviewees, the organization—a theater—saw a “huge gap” in the percentage of its Gen X audience relative to the city's population. Furthermore, their baby boomer audiences were starting to age out, raising questions about both the organization's source of future donors and audiences. Referring to donors, one interviewee asked, “Who is keeping us going if we don't have Gen X?” Interviewees also said early market research suggested that notwithstanding its current underrepresentation, Gen X was a group inclined to attend.

Focus groups reportedly surfaced two barriers:

- Competition for Gen X's limited leisure time. And the competition was reportedly not necessarily from other arts groups but from going out to dinner and social events.
- Gen X members' desire to spend their limited free time on social experiences. That desire reportedly included a wish for a full experience, with a “transition” from daytime activities into the theater experience rather than just coming for a play and leaving.

The theater developed a new series, which offered a different type of programming (artists from multiple genres). Speaking to the target audience's perceived desire for a full and social experience, the organization held the series in a smaller theater space adjacent to a café/bar (both of which were additions to the theater's existing venue). For one interviewee, the main thing learned about their target audience was that “providing [Gen X] with the whole night out, the whole experience, the place to eat, drink, art, and converse, is what they like.”

Interestingly, the series' approach resonated with findings from our survey: Pooling responses from across the 15 organizations, we found that Gen X (and millennial) respondents were more likely than older respondents to offer socializing with family and friends as a reason they attended live performing arts performances in 2019. In addition to incorporating social elements, the average ticket price was also lower for special series productions, also consistent with our survey responses, where lower cost was more frequently offered as a consideration by Gen X and millennial respondents.¹⁵

The different format of the series challenged the theater and its staff to make adjustments. One interviewee recalled that trying to mold audiences for different genres (as in their series) into a theater audience did not work. For instance, their main season plays start at a certain time with specified late seating points. Main season audiences cannot walk in and out freely. Yet the interviewee explained, “if we had stuck to those rules, that would have been so unwelcoming to these new audiences.” For instance, the series includes improv, but “improv audiences go in and out during the show, and buy a lot of beer, and bring it back in.”

At the same time, the organization believes that the addition of the bar and the series has yielded substantial benefits, making the organization as a whole a more welcoming environment. The bar and the new space, said one interviewee “empirically shifted the way that [the organization] feels from an audience perspective. It just infuses the campus with, many nights, a much younger, more diverse engaged, activated audience.” After the end of the initiative, the series and the café/bar remained in place.

Yet, when asked if their audience-building project was a success, and whether they would choose the same target audience, interviewees' responses were more tempered than one would expect from such positive outcomes. One person believes:

[I]t was successful in that it was executed with the highest degree of artistic and professional sophistication. It did not tell us the answer that we wanted to hear. . . . But . . . I would view that as a success because we know, as a result, what to invest in and what not to invest in moving forward.

In the opinion of another interviewee, “Maybe it is as successful as it can be. I think we were hoping for a silver bullet. And I think maybe in the end, there just isn't a silver bullet.”

What was missing? The organization's initial hope was not only to have Gen X audiences attend but also to attend multiple times and to develop a sense of loyalty and belonging in relation to the organization. That type of relationship, however, was not realized. As one interviewee said:

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It’s still a very transactional relationship. And so it really is dependent on whether the product that we’re offering maps to what they want to go and see, and if it is a priority of their time.

Further, the organization’s initial attendance and earned revenue goals were not realized. However, the new venture did have positive financial implications. The café\bar helped shift the organization’s business model by diversifying revenue sources. When asked, interviewees said that were there to be a longer-term impact on the organization’s financial health from their initiative engagement, they expect it to be from hoped-for revenue generation from these new operations.

Target-Audience Outcomes: Race/Ethnicity

Four of the fifteen organizations defined their target audience in terms of race/ethnicity, including three theater companies and an opera company. Two of the organizations tried to expand racial and ethnic diversity broadly, one sought to enlarge attendance by Asian American and Pacific Islander (AAPI) audiences, and one sought to enlarge attendance among Black and Latinx audiences. Note that one of the four organizations pursued both an age and a race-based target audience and, thus, is included in both sections.

Discussing why they chose target audiences defined in terms of race/ethnicity, interviewees spoke of their organizations’ current lack of audience diversity relative to community demographics and a desire to see their audiences be more inclusive and diverse. For instance, one interviewee said, “We want to make our audiences look more closely like the demographic makeup of [this city].” Another said, “It’s both a mission issue and almost kind of a moral issue which is that . . . we have to be serving a diverse audience.”

Key Findings:

- Two of the four organizations saw statistically significant gains in their target audience between 2015 and 2019. Still, since starting figures were so low, even with dramatic percentage gains, the vast majority of the audience remained White, non-Hispanic.
- White bookers attended more frequently and bought more tickets than did bookers of color at both of these organizations, but there was no statistically significant difference in the average ticket price they paid.
- Both organizations concluded that expanding the diversity of artistic programming and artists was key to expanding audiences of color.

Are Bookers the Same Age As Those They Attend With?

Percentage of Bookers and Other Audience by Age Range: Combined Data for 2019

Organizations’ information on audience composition is typically based on bookers since they purchase the tickets and are in the database. But what about the other people who attend with the booker, such as their family and friends? As one interviewee said, “We have sort of a ghost audience, right, people who come with other people.... We don’t know anything about them.” Our findings offer preliminary but compelling evidence that estimates of audience age based solely on bookers are likely different—and older—than estimates based on the full audience.

We asked survey respondents (bookers) in our 2019 samples about the demographics of up to three other people they obtained tickets for. We then separately aggregated age data on the 10,693 bookers and age data on the 5,254 other people they obtained tickets for across all fifteen organizations. Consistent with the study’s focus, age data are for attendees 18 years or older. As the table that presents the results below shows, as a group, bookers were older than those for whom they obtained tickets. For instance, 56.8 percent of bookers as compared with only 40.0 percent of others were age sixty or older.

Age distributions may vary among individual organizations, but the differences between bookers and others strongly suggest that audiences may be younger than indicated by estimates based solely on bookers. The implications:

Age	Bookers	Others
18-24	1.3%	6.6%
25-34	6.9%	14.6%
35-59	35.0%	38.9%
60+	56.8%	40.0%

Source: The University of Texas at Austin Building Audiences for Sustainability Research Study survey. Based on 10,693 respondents (data were missing for an additional 20 respondents)

- Organizations trying to track the age of their audiences may wish to explore ways to learn about both booker and non-booker ages (e.g., through questions on their audience surveys).
- Many organizations are looking for ways to connect with younger audiences. Results suggest that more of them than they may realize are in their audiences. Thus, organizations might consider ways to connect with them while they are onsite during performances.

Note that we did comparable analyses of bookers and others for race and gender. However, the results did not indicate that including non-bookers would substantially impact estimates of audience gender or race.

- One organization hoped that the more diverse audience at its offsite performance series would go on to attend mainstage programs. When that did not occur, the organization kept the mission-central programming, and instead changed its metric of success.
- Other key strategies at both organizations: changing their communications, working with community leaders/advisors from diverse groups, and creating a more welcoming environment.

Changes to Main Season Attendance: Race/Ethnicity-Based Target Audience Definitions. As Table 7 shows, two of the four organizations saw statistically significant gains in the percent of bookers from their target audiences.¹⁶ The two that sought broadly to expand people of color as bookers saw gains, with substantial increases in people of color as a percent of all bookers (44 percent in one case and fully 72.71 percent in the other). However, as Table 7 also shows, these dramatic percentage increases reflect low base figures because the vast majority of the organizations’ bookers were White, non-Hispanic. The other two organizations did not see statistically significant gains.

These findings gave all respondents an equal weight in the analysis, regardless of how often they attend. As with our analyses of age-based target audiences, we also looked at audience changes through a second lens, giving respondents different weights, depending on how often they attend, to assess changes in who is actually “in the seats” over the course of the season. Only one organization—one of the two organizations that saw audience gains in the percentage of bookers of color—saw gains in people of color as a percent of audience for the season.

Financial Implications of Race/Ethnicity-Based Target-Audience Gains. As Table 8 shows, White bookers attended more frequently and bought more tickets than did bookers of color. The total spent on tickets was also significantly higher in the case of Organization A but not Organization B. However, and in notable contrast to the situation with age-based target audiences, there was no statistically significant difference in the average ticket price paid by bookers of color and White bookers at either organization. When people of color and White bookers attend, they spend comparable amounts on tickets.

Special Series and Programming to Attract Target Audiences Defined in Terms of Race/Ethnicity. Only one of the four organizations with a raced-based target-audience definition had a special performance series as part of its audience-building project. However, themes around programming were raised by interviewees at both organizations that expanded the percentage of people of color among its bookers. Both are discussed below.

Example One: A Special Series and Multi-Ethnic Commissioning Program at One Theater. Organization A, a theater, had a series including site-specific performances in community settings outside of the organization’s home venue. The series predated the BAS initiative and, according to the organization, was already attracting a more diverse audience than main season productions. Our analysis of 2015 data is consistent with the organization’s report. However, the series evolved into a biennial festival, and 2019 was an “off” year, with few series performances. Consequently, we have too few cases to assess audience change at the series between 2015 and 2019, or to compare the special series and main season audience demographics.

Table 7
Main Season Target Audience Attendance, 2015–2019:
Four Organizations with Race/Ethnicity-Based Target Audience Definitions

Organization	Target Group	2015/2019 Survey N	Target Audience Group as a Percent of Bookers			Target Audience Group as a Percent of Audience		
			2015 %	2019 %	Percent Change 2015 - 2019	2015 %	2019 %	Percent Change 2015 - 2019
A	People of Color	630/713	11.15	16.06	44.00*	10.40	13.15	26.48
B	People of Color	471/534	6.15	10.61	72.71*	4.90	8.33	69.95*
C	AAPI	486/635	8.49	7.52	-11.41	7.44	7.09	-4.69
D	Black/African American	243/413	6.30	5.10	-19.02	4.92	5.92	20.33
D	Latinx	243/416	4.08	6.22	52.44	3.09	5.20	68.29

Source: The University of Texas at Austin Building Audiences for Sustainability Research Study survey.

Notes: Figures for target group as a percent of bookers are booker weighted, and figures for target group as a percent of audience are production weighted (see Appendix).

Read as follows: At Organization A, people of color comprised

11.15% of those who obtained tickets to one or more main season productions in 2015 and 16.06% in 2019 (an increase of 44.00%). As a percent of audience, in 2015 people of color comprised 10.40% of the season audience and 13.15% of the 2019 audience (an increase of 26.48%).

*p<.05, **p<.01, ***p<.001

Table 8
Target vs. Non-Target Audience Ticket Purchasing Behavior at Organizations that Expanded Target Audiences Defined in Terms of Race: 2019 Main Season

Org	Target Audience	Total Tickets Obtained		Total Spent on Tickets		Average Paid per Ticket		Total Productions	
		Non-Target	Target	Non-Target	Target	Non-Target	Target	Non-Target	Target
A	People of Color	4.97	3.78**	285.07	202.58***	59.44	52.02	2.26	1.79**
B	People of Color	4.24	3.16**	282.54	240.73	65.08	77.54	2.03	1.55**

Sources: The University of Texas at Austin Building Audiences for Sustainability Research Study survey and organizational ticket databases.

*p<.05, **p<.01, ***p<.001

Still, it is instructive to consider what interviewees shared about the evolution of the series and their expectations of it in relation to their target-audience goals. According to the organization, the series continues to draw more diverse audiences. Originally, the organization hoped the series would serve as a pipeline to their main season productions, but that did not occur. According to one interviewee, the early thinking was:

If we get people interested and we go into a community, and people come there, downtown or whatever, and they do an interesting sort of site-specific 30-minute thing that they can do with their friends that's \$20 and that involves a glass of wine, that will be their sort of entry drug into coming into the theater. . . . And it turns out that's not the case. There's a whole bunch of people who are really happy just doing the [special series]. And it's a younger . . . more diverse group of people.

The organization nonetheless continues and values the program but now sees it as “its own universe.” It considers attendees “as much our patrons as the people who are . . . subscribers who don't do [the special series].” This interviewee sees an evolution in their thinking: Instead of deeming the program a failure because it did not yield crossover, the organization changed its idea of success—and did so because through surveys and other feedback they heard from people, “We love this stuff.” When organizational staff would encourage series attendees to buy a main season subscription they said, “Why would we do that? We like *this* stuff.” The organization decided it was important to continue the series but doing so requires them to raise money to subsidize it because, in their view, it will never pay for itself (and requires a higher percentage of subsidy than other work). Still, “It's hugely, hugely mission-specific. . . . It's cultivating a different set of artists. It's cultivating a different set of audience. It's cultivating a different conversation.”

However, this organization did also enlarge the percentage of bookers of color at its main season productions. Interviewees feel one contributing factor was their multi-ethnic

commissioning programming, which an interviewee characterized as follows: “Basically the commission and production team are working with others who are not of their own race.” In some cases, it involved commissioning work by artists who are themselves multi-ethnic. This interviewee emphasized that they are not marketing to just one racial demographic. Another interviewee was likewise emphatic they were not saying, “We're going to find a Latin playwright, find a Hispanic playwright and he's going to write a play about being Hispanic in America, and then we're going to get a Hispanic audience.” One example offered was a play that involved an Asian American playwright, a Hispanic director, and an Asian cast—with an interest in what each of the artists bring “to the table with their experience and their point of view” to provide the story with depth, nuance, and authenticity. The organization reports that diverse programming attracts more diverse audiences.

Example Two: Expanding Diversity in Casting and Programming at an Opera. Interviewees at the other organization that saw an increase in audience diversity, an opera, attributed diversity in casting and in programming as factors in that increase. Interviewees especially cited a 2019 season production centered around the story of a young Black man, featuring a Black cast, and by an African American composer. Asked why he thinks their target audience increased, one interviewee said: “I don't think we know why. I think we'd guess that it's . . . more because of [this production]” and elaborated as follows:

If you want to attract younger and more diverse audiences, what's onstage has to speak to younger and more diverse audiences. Diversity in casts, diversity in the company, not just onstage, but the people who you see when you come to a space. . . . And what is the story that I'm seeing? It's one thing to put a Black Violetta into *La Traviata*. And that's a good thing to do. And we have to. It's another thing to put [this opera] on the stage, a work by Black creators, with Black leadership and a Black cast. And we have to do both of those things to authentically and inclusively bring people of color into our audience.

Our survey analysis did indeed find that a far higher percentage of Black and African American respondents attended this production than the opera's other productions ($p < .001$). Over 90 percent of African American and Black survey respondents had attended this one production. Still, as this same interviewee said, this production is but one data point. Another interviewee noted that the institution had also had good experience with other culturally specific programming, but that audience diversity declined during a year with more exclusively Eurocentric programming (since we do not have survey data for those years, we cannot conduct comparable analyses). This result resonates with our survey findings: Pooling responses across audiences from the fifteen organizations, we found that respondents of color were more likely to say that celebrating cultural heritage was a reason for their attendance at live performing arts events.¹⁷

At the same time, substantial percentages of White audiences (47.9 percent) also attended the referenced opera. Indeed, this same production attracted a higher percentage of White respondents than did all but one other opera that season.

Both the theater and the opera expressed long-term commitment to diverse programming and casting. Further, they also felt they were programming things with an appeal beyond any one specific demographic group.

While both organizations saw programming and engaging diverse groups of artists as key factors in attracting more diverse audiences, both also employed other approaches, to which we now turn.

Organizations that Saw Audience Gains Among People of Color: Other Themes, Other Strategies. Among the other strategies referenced by the organizations that increased their target audience were changing their communications, working with community leaders from diverse groups, and creating a more welcoming environment.

Diversifying Front of House. The theater took measures, including hiring paid concierges, to diversify its front-of-house staff in terms of age as well as racial and ethnic diversity. The organization viewed this as an important part of conveying a welcoming environment to diverse audience members. According to one interviewee it “has actually been remarkably potent as one simple change.” Still, interviewees said the change was not without challenges, because expanding the numbers of front-of-house staff meant fewer opportunities for long-term volunteers. Thus, the organization found additional ways to engage and provide access for them. As one interviewee emphasized, the organization's goal was to make more people feel welcome, not to make their older demographic feel unwelcome.

Communicating in a More Inviting Way. The theater believes that one of their key successful strategies was to shift their marketing language, in order to convey a more inviting atmosphere. Early market research indicated that their materials were not welcoming and conveyed an overly “precious” attitude about the art. The problem:

It just sounded very highfalutin, artsy-fartsy, academic, art, art, art. You know? Come to our edgy innovative experimental art. . . . So we really just repositioned to try to speak in a way that just takes it down

a few notches. People do want to come and have fun, have a meaningful experience.

Now, they go for language that is “down-to-earth, festival, everyday language, welcoming, inviting, less precious.” The language remains professional but is now more conversational. One example: A “tongue-in-cheek” approach they used in an ad for one play, that asked “Are you seriously doing a play about [that]?” Note that the organization sees this shift in communications as conveying a more inviting atmosphere to audiences in general, not just a specific target-audience group. And indeed, this strategy (and the perception of insularity and elitism it sought to correct) echoes one offered at other organizations with different target audiences.

Connecting with Community Leaders. Both organizations worked with advisory groups, which in both cases were in place prior to their initiative projects. The theater said that while it has made its communications more inviting, the advisory group of community leaders, which is more diverse than their audience, has been “a key part in making that invitation personal to other communities.” The advisory group helps connect the organization to others through their networks: “Creating a genuine relationship-based pipeline . . . to these communities we're trying to target.” For instance, one advisor recently invited the theater company to be part of a panel about people of color in the arts, providing them a chance to speak about their season and job opportunities.

Likewise, the opera company said it turned to its advisory group as part of their project. For instance, one of their strategies was to pair opera performances with menus at local restaurants, and members of the advisory group have served as hosts and helped the organization “identify community partners and locations to best serve a diverse audience.” Further, the group provides input as the organization plans programs and can be a source of insights about how the organization is being perceived in the communities they hope to reach.

Interestingly, an organization that did not see target-audience gains is making changes to its approach, including plans to create an advisory committee. New leadership reached out to different community leaders from its target audience. What they heard from them: The organization was treating a very heterogeneous group of people as if it were one group. One interviewee recalled: “The way we were just sort of generalizing, it was laughable and slightly offensive to him.” The organization has shifted its way of thinking, trying to approach the communities in a more nuanced and differentiated way. The organization plans to develop what started as a series of informal meetings and dinners into an advisory committee that can offer their opinions and input, because “we're not the experts here.”

Non-Demographic Target-Audience Outcomes

Most BAS organizations defined their target audience in demographic terms, but six of the organizations in the outcomes study took a different approach: Two sought to attract current audience to new and less familiar work, one sought to promote crossover between its different “business lines,” one sought to attract residents from its downtown neighborhood, and two sought to encourage more frequent attendance by infrequent

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attendees. Four of the six organizations saw audience gains (see Table 9). Neither of the two organizations that chose infrequent attendees as their target audience (in the hopes of increasing frequency of attendance) saw audience gains.

As we turn to examine the results for the different target audiences, recall that we are now using data drawn from organizational ticket databases, which include all bookers rather than samples.

Target-Audience Outcomes: Audiences for New and Less Familiar Work

A dance company and a theater company focused their efforts on building audiences for their new and less familiar productions. Both organizations value these productions as central to their artistic mission, but they generally attract smaller audiences and generate less income than other productions. Summarizing why they chose this target audience, an interviewee from one organization said, “Over the last couple of years, we’ve been having these sustained conversations about the fact that our mission is about new work and new artists but yet the productions that are the least well-attended are those.” Both organizations saw audience gains for new and less familiar work, with experiences that were similar in many ways.

Key findings:

- Both organizations saw gains in audiences for new and less familiar work between 2015 and 2019. Still, even with audience gains, attendance and ticket revenue remained lower for these productions than for other types of programming at both organizations.
- Building audiences for new work was mission driven. Therefore, expanding audiences and strengthening their financial viability for that work is seen as important, even if it does not generally attract the numbers and revenue of other productions.
- Age proved not to be a useful predictor of attendance at new work.
- More frequent arts attendees, however, were more likely to venture to this work.
- Both organizations found they were communicating about productions in ways that were meaningful to them but not to their intended audiences. Both changed their communications to be more responsive.
- Providing audiences with a sense of what to expect from the work in advance proved important.

The Dance Company. New and less familiar work comprised a small (one production), but valued, part of the dance company’s season. As Table 10 shows, between 2015 and 2019, the company saw an increase in bookers and tickets for new or less familiar work. Results are more dramatic when we exclude complimentary (free) tickets: an increase of 43.40 percent of paying bookers and 46.97 percent in paid tickets. Ticket revenue for new work also increased, by 31.87 percent.

Table 9
Non-Demographic Target Audience
Definitions and Number of Organizations
that Saw Target Audience Gains

Non-Demographic Target Audience:	# Orgs	# Expanding Target Audience
New and unfamiliar work.....	2	2
Crossover\Diversified Product Lines	1	1
Geographic	1	1
Infrequent attendees (to increase their attendance)	2	0
TOTAL ORGS.....	6	4

The number of new works remained the same in both years. In something of a reverse crossover strategy, this organization hoped to attract more of its audience for more traditional programs to attend its new and less familiar work. In other analyses, we found that occurred: The percent of bookers attending other main season productions who also attended the production of less familiar work increased by 26.29 percent (from 6.39 percent in 2015 to 8.07 percent in 2019).

Still, in 2019, attendance and ticket revenue for new work remained substantially below that of other types of programming. Attendance and revenue for the new work production were below even that of the least well-attended non-new work production. Compared to the least well-attended non-new work production, the new work production yielded 76.2 percent as many bookers, 72.6 percent as many tickets, and 63.5 percent as much ticket revenue, although the two productions had the same number of performances.

The Theater Company. A higher percentage of the theater company’s season consists of new work productions. In contrast to the dance company, its numbers of new work productions and performances expanded in 2019: The theater offered one additional new work production and 28.15 percent more performances in 2019 compared with 2015. As Table 10 shows, in 2019 the number of new work bookers remained relatively constant, but the number of tickets increased by 26.27 percent. Furthermore, ticket revenue from new work productions increased by 29.99 percent. In this case, then, audience gains reflect the fact that the organization was able to expand its new work offerings and attract audiences to attend new works more frequently. On average, those who attended new work productions attended an average of 1.38 productions in 2015 and 1.89 in 2019—an increase of 37 percent.

Nonetheless, new works continued to attract smaller audiences and generate less revenue relative to other programming. As a whole, new work productions yielded 68.48 percent as many bookers, 41.16 percent as many tickets, and 42.29 percent as much revenue as other main season productions. However, comparisons between new work and non-new work productions are particularly complicated for this organization. The organization offered a larger number of new work

Table 10
Percent Changes in Attendance, Tickets, and Revenue Generated by New Works: 2015–2019

Org	Percent Change					
	N New Work Productions/ Performances	N Bookers	N Bookers (excluding comps)	N Tickets	N Tickets (excluding comps)	Revenue Generated by New Works
Dance Company	No Change	15.29	43.40	4.78	46.97	31.87
Theater	25.00/28.15	-0.77	-2.70	26.27	25.96	29.99

Source: Organizational ticket databases

than non-new work productions, but non-new work productions generally had more performances. Most challenging, the majority of the new work productions occurred in a different, and smaller, venue than other productions. However, the reason for the difference in venue is precisely because new works attract smaller audiences. A direct comparison of average ticket price underscores the lesser financial returns from new works: On average bookers paid 61.65 percent for new work tickets of what they did for a non-new work ticket.

These results are consistent with interviewee comments. Said one: “We did do better than we had ever done before in our smaller theater. But the tricky part was in our larger theater. . . . It is so hard to sell new work in our larger theater.” Commenting on whether their project had been successful, one theater interviewee reflected:

We had a lot of learnings along the way . . . a lot of things that . . . added to our knowledge base and made us better marketers when we think about new work. So, from that standpoint, I’d say it was successful.

I’d say, though, it was less successful from the standpoint that we didn’t come out of that project, and all of a sudden, we’re able to make new work, garner the same attention or revenue that something that’s established or has a star or has more familiarity. . . . We didn’t come out of it with that sort of silver bullet.

For both organizations, the link to mission is clear, and both saw gains in audience and revenue for this mission-central work. Nonetheless, attendance and ticket revenue remained substantially below that of the other types of programming. In terms of assessing the initiative’s question about the relationship between audience-building and financial gains, building audiences for new work would not seem to be an advantageous strategy from a strictly earned income perspective. But these and other organizations present new and less familiar work as part of their mission. Thus, attracting larger audiences and strengthening their financial viability is an important goal, whether or not the works yield the largest financial returns.

We turn to our qualitative data and survey data to explore two questions:

- What barriers did the organizations identify in attracting audiences to new work and what strategies did they find helpful in overcoming them?
- Who is more or less likely to attend new and less familiar work?

Strategies for Building Audience for New Work: Changing Communications and Closing the “Familiarity Gap.” There were a number of commonalities in the strategies that both the theater and the dance company employed to expand audiences for new and less familiar work. These included:

- Recognizing that language and priorities that resonated with them, as arts organizations, did not necessarily resonate with those they were seeking to reach—and accordingly changing their language and communication.
- Addressing the “familiarity gap” that both organizations concluded acted as a barrier to audience decisions to attend new work.

Communicating Differently. Both organizations concluded that some of their initial communication strategies were based on erroneous assumptions about what was meaningful to audiences (a theme we have also seen in the case of other organizations). And both changed.

The theater’s experience was discussed in our earlier section on marketing content, but it bears repeating here: Initially the organization assumed that for the audience (as for them) “there was a real cachet about world premiere.” They learned, through focus groups and lackluster response to their website publicizing new work, that this assumption was “completely wrong.” The organization had tried packaging new work together, but “we’ve learned that people are not drawn to specifically new work. They’re just drawn to aspects of the play. Putting them all together in one package was not successful. We kind of have to sell each play on its own merit.”

The dance company, for its part, concluded they were communicating in ways that were confusing and failed to connect with audience concerns. The organization accordingly stopped using “weird alienating descriptive words” and changed production titles and descriptions, which feedback revealed were

confusing to audiences (e.g., “mixed rep,” generic series titles repeated different years that left people thinking they had already seen the production). They found that describing a work as “non-narrative” was not helpful. Quantitative market research indicated that most people preferred works that include a story, while qualitative group discussions indicated that people don’t necessarily need a plot but do want to know “what the story is.” Further, the organization concluded that rather than speak about what a production is *not*, they needed to find ways to convey what it is: “Everything is something. You just have to open that up” (for instance, by speaking about the themes that inspired a work).

Closing the “Familiarity Gap.” Both the dance company and the theater started to look for ways to help reduce the greater perceived sense of uncertainty accompanying the decision to go and see new works. As a dance interviewee expressed, “The more we learned from the research about the fact that people who were taking a risk to attend something that was less familiar, it really helped many of them to be able to get a sense of what it was going to be like.”

Examples of some of the strategies used include the following (in some cases strategies were used by one organization and in some cases by both organizations):

- Creating video content to provide a sense of what audiences could expect. One challenge encountered was concern by artists about disclosing too much in advance and/or copyright infringement. Among the ways the organizations addressed the challenges: engaging the artists creating these works about what content would be included; using videographers who were familiar with and sensitive to the concerns.
- Publicizing critics’ reviews and audience reviews (e.g., producing videos with audience testimonials after opening night).
- Letting audiences at productions know about upcoming performances. One strategy was to show trailers about future productions at performances. The dance company had interactive exhibits before shows that also included information about next performances.
- Channeling marketing communications differently to different groups. For instance, one organization moved away from using one voice, to having different organizational representatives communicate to the particular constituencies they were involved with.
- Having a lower price point. This strategy did not reduce the familiarity gap per se but was aimed at reducing the perceived risk of taking a chance on something less familiar.

Interestingly, as they learned more about their audience and potential audience, the dance company expanded their conception of the target audience for new work beyond attendees at other productions, to include people engaged with them in various ways. A key example was people who attend their dance classes, and they expanded communications to that group. Said one interviewee, “They’re in our building.

We didn’t even have posters up inside of the studios that say there’s a performance coming. We do now.”

Who is More Likely to Attend New and Less Familiar Work? Age and Frequency of Arts Attendance. We close this section by returning to our survey for some insights about which audiences proved more likely to attend new and less familiar work. The findings are also relevant for audience-building efforts aimed at younger audiences, which some BAS organizations initially assumed would be particularly attracted to this type of work.¹⁸

Interestingly, a dance company interviewee recalled they had also initially expected younger audiences to be a promising audience for new work: “We were going to go right along with you know, let’s go to the millennial generation.” But, after reviewing their sales data, the organization changed its mind, discovering that “things we’ve just kinda been listening to in our industry and going along with were not reflected in our sales data.”

Our analyses support that conclusion. Furthermore, they also support the organizations’ decisions to focus new work audience-building efforts on people who were already attending their other productions (versus entirely new audiences). We find:

- Age is not a useful predictor of attending new work.
- More frequent attendees were more likely to attend new and less familiar productions, as were subscribers.
- Contrary to common assumptions, to the extent that age was related to new work attendance, older audiences were more likely to attend. However, this proved to be more a function of the fact that older audiences were more frequent attendees, than an association with age per se.

We elaborate on these findings below.

Using our survey data, we asked whether respondents’ age was associated with attending a new work production, conducting separate analyses for each organization. Initially, we found that *older* audiences were significantly more likely to attend—at both organizations and for both the 2015 and 2019 samples. However, once we took frequency of attendance (the number of the organizations’ 2019 productions the respondent attended) into account, the relationship between age and attending new work disappeared, with one exception (it remained significant at one organization for 2015).

In both years, at both organizations, those who attended more productions at that organization were also more likely to have attended a new work production.¹⁹ The preponderance of our findings, therefore, suggests the positive association with age was more a reflection of the fact that older audiences attend more often than of any association with age per se.

We also explored the relationship between frequency of attendance and attendance at new works a second way. Our survey asked respondents how often they attended live performing arts events in 2019 (excluding elementary or high school performances). Focusing on our 2019 sample, we found that bookers at the dance company who were more frequent attendees to live performing arts events in general were

also more likely to have attended a new work production. The same held true at the theater.²⁰

Similarly, at both organizations, far higher percentages of the audiences for new work were subscribers than was the case for the main season in general.²¹ A key question our findings raise but that our data cannot answer:

To what extent is the association with attending new work with frequency of attendance and/or intensity of engagement with the art form per se—and to what extent is it with being a subscriber?

For instance, subscribers might be more likely to attend a new work production because it was part of their season subscription but might not have otherwise attended. If that is the case, then the oft-remarked decline in subscriptions in the performing arts field would create additional challenges to attracting audiences to new and unfamiliar work—an undertaking many organizations see as central to their mission.

Target-Audience Outcomes: Crossover Between Diversified Product Lines

One organization, an opera company, incorporated crossover into its very target-audience definition: Audience members with the potential to cross over between the organization's multiple business lines. As one interviewee put it, "Our focus essentially was . . . to understand how we could grow earned revenue and benefit from diversified activities through crossover audiences." According to another interviewee, the organization felt that crossover offered greater opportunity than a demographic-based target because the organization was already pursuing program diversification, and "it seemed the best opportunity for [us] from improving our financial situation." Note that this organization's project, in contrast to many others, did center earned income as part of its audience-building project.

Key findings:

- Audience gains occurred between 2015 and 2019 but were linked more to the diversified business model than to crossover between business lines. Further, audience gains seemed primarily related to a highly successful 2019 production in one of the business lines.
- There was some evidence of increased crossover from opera to musicals, but it was production dependent. Crossover from musicals to opera decreased.

We elaborate on these conclusions below.

Changes in Crossover Between 2015 and 2019.

This organization offered two musicals in 2015, but only one in 2019. Therefore, assessing whether crossover between musicals and operas increased presented a challenge because opera audiences had twice the crossover opportunities in 2015 than they did in 2019. Therefore, we did two separate analyses: First we compared 2019 crossover to 2015 crossover using Musical 1, and then we did the same but using Musical 2.

As Table 11 shows, regardless of which 2015 musical was examined, the percentage of musical bookers who attended an

opera decreased in 2019. On the other hand, the findings for change in crossover from opera to musicals depended on the comparison. A higher percentage of opera attendees went to Musical 1 in 2015 than attended a musical in 2019 (i.e., crossover decreased). However, the percentage of opera attendees who attended a musical in 2019 was considerably higher than the percentage of opera attendees who attended Musical 2 in 2015 (i.e., crossover increased). This suggests that the frequency of crossover from opera to musicals was production dependent. Or, as one interviewee said, "It really depends on what the musical is."

Audience Gains and a Diversified Product Line.

The organization did see dramatic audience gains, related to their musical business line. Their 2019 musical attracted more bookers, sold more tickets, and generated more revenue by far than any other production that season. The organization also offered almost five times more performances of the musical than the average offering for its opera productions. Still, musical performances outsold performances of other productions by close to 20 percent. Further, as Table 11 shows, most of those who attended the musical *only* attended the musical (i.e., did not cross over to attend an opera). Thus, for the two years under consideration, we see more evidence of audience and financial gains related to the diversified product line, than to a target-audience crossover strategy.

Interviewees' comments are consistent with our quantitative analyses. For instance, asked for thoughts on why attendance increased over their BAS initiative, one interviewee said that the final year of the initiative was a highly successful one, due partly to the extraordinary success of that year's musical. Still the interviewee also noted that "perhaps four years earlier, we would not have made as much of a success of [the musical] as we did four years later. But that's speculation."

As noted, the musical attracted large audiences and was financially advantageous. Still, notwithstanding this success, interviewees concluded they had not found the "silver magic bullet" to audience or financial sustainability. And indeed, we found no association between change in ticket revenue and change in measures of overall organizational financial health (such as revenue, assets). Also, important to note is that this organization's diversified business model encompassed both financial and other mission-related goals, including some lines (e.g., community engagement programs) that were assumed to require subsidy.

One interviewee believes that the initiative as a whole explored the potential for sustainable projects through earned income but demonstrated, "It's not attainable. But therefore, we now need to turn to the other source of revenue, which is contributed revenue." Moving forward, the organization hopes to find ways to subsidize the cost of tickets "because it seems . . . that we can achieve audience growth, but not achieve proportionate earned revenue growth."

Target-Audience Outcomes: Attracting a Geographically-Defined Audience

A symphony focused on attracting residents from its nearby and fast-growing downtown area. The organization's decision was partly based on proximity, and market research also suggested downtown residents were likely to be interested in the

Table 11
Change in Percent of People Crossing Over from Opera to Musicals and from Musicals to Opera 2015–2019: An Opera Company with a Crossover Target Audience

% Crossing Over from Opera to Musical/Musical to Opera			% Change 2015-2019	
2015		2019	Comparison using:	
Musical 1	Musical 2		Musical 1	Musical 2
36.21/59.57	16.14/24.06	25.80/20.71	-28.76/-65.24	59.80/-13.94

Source: Organizational ticket database

Read as follows: In 2015, the organization presented two musicals: 36.21% of opera attendees attended Musical 1, while 59.57% of Musical 1 attendees went to an opera. Turning to Musical 2, 16.14% of those who attended an opera attended Musical 2, while 24.06% of Musical 2 attendees attended an opera. In 2019, which had one musical, 25.80% of opera

attendees went to a musical, while 20.71% of 2019 musical attendees went to an opera. Comparing 2019 crossover with 2015 crossover (using Musical 1), crossover from opera to musicals decreased 28.76% and crossover from musicals to opera decreased 65.24%. Making the same comparison using Musical 2, crossover from operas to musicals increased 59.80% while crossover from musicals to opera decreased 13.94%.

organization’s offerings. Explaining their reasoning, one interviewee said:

Why wouldn’t we want to study the audience, which is on our doorstep? And we know that the people who live downtown . . . that they’re skewed a little bit higher in terms of income, that they’re skewed towards financial, towards cultural entertainment and participation. That’s why people move downtown. So why wouldn’t we want to engage with those people?

The organization anticipated that the downtown area would include a younger audience but chose not to define their target in age-based terms. One interviewee said, “Most organizations want to focus on the young audiences because . . . that’s the solution to filling in the gap left by the aging out part of the audience. But I think that wasn’t as interesting to us as the idea of . . . dynamic new growth that was happening [here].” Another interviewee said: “If you go to our [late-night contemporary music series] . . . it’s not all young people. It’s plenty of older people. But edgier older people.” And, as it turns out, the age profile of most of the target group was not as young as initially anticipated.²² Key findings:

- The organization saw a considerable increase in target-audience attendance between 2015 and 2019. In contrast to many other organizations, target-audience expansion in this case accounts for a notable part of the organization’s total increase in bookers.
- Target-group attendance increased at special series and other main season productions.
- Far higher percentages of target-audience members, like non-target audience members, attended other main season productions than attended special series intended to attract the target audience.
- Also unusual, this target audience proved fairly similar to

the non-target audience in terms of frequency of attendance, average numbers of tickets purchased, and the total amount spent on tickets.

- Among the key strategies employed: revising initial assumptions about target-audience preferences when they proved to be unfounded; adapting programming to be more responsive to audience interests; expanding and diversifying marketing; implementing changes to make attending a smoother and more welcoming experience.

Audience Building and Organizational Size

Only one of the four organizations in the outcomes study with operating expenses under \$5 million saw target-audience gains, as compared with nine of the eleven larger organizations. While the relationship between organizational size and target-audience gains did not meet the .05 threshold for statistical significance ($p < .08$), this finding, coupled with interview data, suggests that audience-building approaches and grantmaking support for them, may need to be adapted for organizations of different sizes. Asked about major challenges faced over the course of the initiative, every small organization (compared with only one-third of the larger ones) referenced capacity-related issues, particularly the amount of work required relative to staff size. For instance, one interviewee said especially in the beginning “Capacity was an issue. Adding these events and all the research and the amount of time that we had to devote to this new program, which...we wanted to do... It was still a lot to jump on...because we’re a fairly small organization, with people wearing a lot of different hats.” (Note: We generally use Chi-square tests in reporting statistical significance, but in this case use Fisher’s Exact test due to the large number of table cells with expected counts under five).

- The organization discontinued efforts it found less successful. These included a new special series created as part of its initiative efforts and some ancillary activities, such as pre-concert food events.

Changes in Main Season Attendance. The organization saw marked gains in attendance from their targeted downtown zip code areas. As Table 12 shows, between 2015 and 2019, the percentage of main season bookers from the downtown area grew by 50.24 percent. While the target group remained a relatively small percentage of all bookers, their growth was so substantial as to contribute to almost 47 percent of the overall increase of total bookers at the organization.

Furthermore, as Table 13 shows, this downtown audience was relatively similar in frequency of attendance to non-target audience attendees. In 2019, downtown target-audience bookers attended a slightly higher average number of productions than did non-target audience members (3.25 versus 2.85) but purchased a somewhat lower average number of tickets (5.13 versus 5.52).

In this case, the chosen target audience grew, attended

somewhat more frequently, and comprised a significant part of overall growth in organizational bookers.

Financial Implications of Downtown Target-Audience Gains. Furthermore, as Table 13 also shows, on average, target-group bookers spent a total amount on tickets comparable to that spent by non-target bookers—in fact the average total spent on tickets was higher among target-group members. Somewhat counterintuitively given this finding, target-audience members paid a lower average price per ticket, but this is because they received a higher number of comps, depressing the average. When comps are removed from the equation, downtown bookers actually paid a somewhat higher price per ticket.²³

In this case then, the target-audience choice *was* consistent with a picture of audience-building linked to financial health.

Changes in Special Series Attendance. The organization’s project included two special series, both part of the main season, that they thought would be particularly attractive to the downtown audience. One offered innovative music in small, late-night concerts, while the other presented classi-

Table 12
Downtown Target Audience and Other Bookers at a Symphony Orchestra: 2015–2019

Production Type				Percent of Series from Target			Percent of Target and Non-Target Booking by Production Type	
	N 2015	N 2019	% Change N	Downtown Bookers as a % of All Bookers to Production Type			% Downtown Bookers	% Other Bookers
	Others/Target	Others/Target	Others/Target	2015 %	2019 %	% Change 2015-2019	2015/2019	2015/2019
Any Main Season (MS)	23,534/ 1010	24,204/ 1595	2.85/ 57.92	4.12	6.18	50.24	All	All
MS Special Series 1: small, late night innovative music performances	387/ 21	214/ 35	-44.70/ 66.67	5.15	14.06	173.09	2.08/2.19	1.64/.88
MS Special Series 2: Classical music in shorter format	2029/ 100	1937/ 151	-4.53/ 51	4.70	7.23	53.97	9.90/9.47	8.62/8.00
Other Main Season (ex. Special Series 1/2)	22,553/ 978	23,261/ 1516	3.14/ 55	4.16	6.12	47.21	96.83/ /95.05	95.83/ 96.10

Source: Organizational ticket database

Note: Excludes organizational bookers (such as third-party resellers) and anonymous walk-up bookers since there is no way to ascertain the geographical residence of the ultimate ticket holder.

Read as follows: 23,534 non-downtown area bookers and 1,010 downtown bookers attended one or more main season productions in 2015. The corresponding figures are 24,204 and

1,595 in 2019. Downtown bookers were 4.12% of all main season bookers in 2015 and 6.18% in 2019.

Moving to the two rightmost columns, all bookers in the table attended one or more main season productions. The remaining rows read as follows: Of all 1,010 downtown bookers for the 2015 season, 2.08% attended Special Series 1, 9.9% attended Special Series 2, and 96.83% attended other main season productions. Percentages do not sum to 100 since bookers may have attended more than one series.

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cal music in a shorter concert format. Unlike the situation at many other organizations, these special series both existed in 2015, permitting comparisons between the “pre” and “post” years.

As Table 12 shows, target-audience numbers at these series increased between 2015 and 2019 by large percentages (173.09 percent in one case and 53.97 percent in the other). Still, the special series were considerably smaller than other main season series. During this same period, the numbers of target-audience members at those other main season productions also increased, by 47.21 percent. Although the percent increase here is less dramatic than those at the special series, the numbers of people added were considerably higher.

Taken together, findings suggest that while the special series attracted additional numbers of target-audience members, the series’ contribution to the increase in the target audience at the organization was modest. A higher percentage of downtown bookers than other bookers attended both special series, but percentages were still under 10 in each case. By contrast, over 95 percent of target-audience bookers, like non-target audience ones, attended another main series production.

Programming and Other Strategies to Attract Downtown Audiences. As interviewees noted, this organization tried many strategies over the course of the initiative. Among those they found most successful were:

- *Adapting programming.* Interviewees said that one of their major learnings had to do with the power of programming. Said one, “As good marketers as we are, you can’t overcome programs that people don’t want to go to.” An example:
 - The organization initially thought audiences at one of their special series would be receptive to contemporary works. However, market research and attendance patterns revealed that was not the case. Instead, according to one interviewee, they found that the audience “does want very conservative programming. . . . We used to think that . . . if we put in a contemporary piece here and there maybe it will fly. Now we know that it wouldn’t.” Another interviewee explained they adapted series’ programming, so that now “we are programming toward the needs of the community, rather than imposing something. . . . We are actually hearing the feedback and changing our practices accordingly.”
 - By contrast, their other special series is intended for an audience that seeks more contemporary works, and it remains experimental.
 - The organization concluded that its audience was more heterogeneous than it previously realized and feels its programming is accounting for a segment whose preferences were not previously taken into consideration.
- *More and varied marketing efforts.* According to interviewees, early market research found the target audience was aware of the symphony but not of its full array of offerings. Efforts to address this included more digital marketing and a distinctive relationship-building approach. The organization hired a staff member to reach out to concierges in

Table 13
Downtown Area and Other Bookers’
Ticket Purchasing Behavior (2019):
Symphony Orchestra with a
Geography-Based Target Audience

	<i>Other Bookers</i>	<i>Downtown Area Bookers</i>
Average Number Tickets Obtained	5.52	5.13
Average Total Spent on Tickets	\$266.64	\$280.86
Average Price Paid per Ticket	\$44.67	\$37.44
Average Number of Comp Tickets	0.38	1.02
Average Number of Productions Attended	2.85	3.25

Source: Organizational ticket database

downtown buildings (e.g., inviting concierges to the organization), in the hopes that they would then be a referral for the organization. They also organized small events at some of the downtown condominiums (where one or two musicians would play) and distributed offers for the symphony. The organization felt this was a successful strategy and plans to replicate it in other neighborhoods.

- *Enhancing Customer Experience.* The organization tried various strategies to make the experience of attendance smoother and more welcoming. For instance, they welcomed new subscribers at a concert with a special gift, such as a free drink coupon. The organization provided customer-experience training to front-of-house and back-office staff. They identified and adjusted website issues and the flow of movement through the hall (e.g., by reconfiguring how people line up to enter the hall).

The organization also discontinued some efforts, concluding they were less successful. Examples include:

- *Discontinuing a Series:* In addition to the two special series already discussed, the organization created a new special series as part of its project. The series included genre-crossing concerts, including symphony performers and rock and other popular artists. The organization discontinued the series because attendance proved variable and highly artist dependent. According to one interviewee, “It didn’t really produce any lasting change in who was coming to the organization. They came for that one event. And that was the only thing that they were really attracted to.”
- *Ancillary events:* The organization discontinued some enhancements to the concert experience, such as special pre-concert food events. Interviewees recalled that a survey

showed these were not very meaningful to the audience, that people were more interested in the programming—and the food events were costly. The organization accordingly discontinued these, returning to offering their regular food stations, realizing that they did not need to “reinvent the wheel every time, because people didn’t need it.”

Target-Audience Outcomes: Trying to Attract Infrequent Attendees to Attend More Often

An arts presenter and a theater company chose infrequent attendees as their target audience, seeking to turn them into more frequent attendees. The arts presenter defined “infrequent” attendees as those coming once in the season, while the theater defined them as those attending one to two times.

Initially the arts presenter pursued an age-related target, but based on market research, decided infrequent attendees offered the more promising pool for replacing their loyal, but aging, current core audience. The theater company said they chose this target audience because they were already attracting new audiences and hoped through marketing to find ways to have them return. Additionally, theater interviewees felt this target group encompassed a diversity of demographic groups they wished to reach. As Table 14 shows, we did not find increases in frequency of attendance between 2015 and 2019 at either organization.

Key findings:

- The vast majority of bookers at both organizations were infrequent attendees.
- The percentage of bookers who attended infrequently did not notably decrease between 2015 and 2019 at either organization (and even increased at one organization).

- The theater, but not the performing arts presenter, still increased overall attendance—but most continued to attend infrequently.
- Most infrequent 2015 bookers did not attend in 2019, but most of those who did, remained infrequent attendees. Frequent 2015 attendees were much more likely to attend in 2019.
- There was a negative relationship between having infrequent attendees as a target audience and target-audience gains. The relationship did not meet the .05 standard of statistical significance (here, $p < .10$),²⁴ but this finding is consistent with our numerous other findings about the challenge of engaging audiences to attend more often.
- The arts presenter did not realize crossover hopes for its special series of adventurous programming but found the series was unexpectedly attractive to its current audience. Consistent with earlier findings about frequent attendees’ greater proclivity to attend new work, subscribers comprised a higher percentage of the audience for this adventurous programming than for main season productions.

While neither organization recognized hoped-for target-audience changes, their overall attendance changes are different. The arts presenter had fewer bookers in 2019 than in 2015. The theater company did expand audiences—it’s just that much of that audience remained infrequent attendees. In retrospect, the theater felt it might have done better to focus on attracting new audiences that were similar to their current loyal attendees, rather than trying to turn infrequent audiences into frequent theatergoers. One interviewee noted the organization needs to better understand “what creates

Table 14
Percent of Infrequent and Frequent Attendees
in 2015 and 2019, and 2015 Attendees’ Attendance in 2019:
Two Organizations Seeking to Increase Infrequent Attendee Attendance

Org	N 2015/2019	Attendee Type	% 2015 Bookers	% 2019 Bookers	2015 Attendees’ Attendance in 2019		
					Did Not Return %	Infrequent %	Frequent %
Arts Presenter	3,936/2,710	Infrequent	74.24	73.54	92.44	4.86	2.70
		Frequent	25.76	26.46	57.69	8.09	34.22
Theater	8,657/10,102	Infrequent	85.31	90.10	91.04	7.39	1.57
		Frequent	14.69	9.90	52.75	13.92	33.33

Source: Organizational ticket databases

Notes: Excludes organizational bookers (such as third-party resellers) and anonymous walk-up bookers. The arts presenter defined infrequent attendees as those attending once per season, while the theater defined them as those attending 1-2 times.

Read as follows: In 2015 the arts presenter organization had 3,936 bookers and 2,710 in 2019. Infrequent attendees were 74.24% of 2015 bookers and 73.54% of 2019 bookers. Most 2015 infrequent attendees (92.44%) did not return in 2019, 4.86% attended infrequently, and 2.70% attended frequently.

brand loyalty” and try to deepen relationships with people who already are loyal, concluding: “We were trying to create transformational experiences with folks who only were having transactional experiences with us.”

Special Series as a Strategy to Increase Attendance. Key to the arts presenter’s audience-building strategy was developing a (non-main season) special series of more adventurous programming, relative to its main season productions. The organization originally hoped this series would provide a “gateway” to attract the target audience, who would then go on to main season productions. Consistent with the many other examples of crossover strategies we have considered, the organization concluded the series was not serving as a gateway. And when we ran the analyses presented in Table 14 including the special series along with main season productions, the results were similar: The hoped-for conversion of infrequent attendees did not occur.

The organization, however, embraced and continued the series. Said one interviewee, “This embrace of a boundary-pushing . . . is now a core part of our artistic offering. . . . That’s a huge shift.” Instead, the organization has changed its thinking about “gateways.” Instead of trying to attract people from “gateway” productions to different types of productions, the organization is now exploring ways to help audience members connect to other performances that reflect the audience member’s interests.

One concluding finding about the special series aligns with our earlier findings about new work target audiences. The arts presenter found that the adventurous programming proved unexpectedly attractive to the organization’s core audience of regular attendees. As one put it, “The biggest aha was actually seeing . . . ‘reverse crossover.’” Our analyses are consistent with that conclusion: While season subscribers comprised 16.1 percent of main season bookers, they accounted for fully 25.2 percent of special series bookers. This dovetails with our earlier finding that more frequent attendees are more likely to venture to new and less familiar work.

Target-Audience Gains and Total Attendance, Ticket Revenue, and Measures of Financial Health

Were target-audience gains associated with changes in the organizations’ total attendance, total ticket revenues, and/or organization-level financial measures? Given organizations’ typical focus on target audiences that comprised a small percentage of their audience to begin with (and the myriad of other potential influences on attendance and financial health), we would not really expect to find associations, nor did we. Key findings:

- Success in expanding target audiences was not related to changes in total attendance, total ticket revenue, or measures of organizational financial health.
- Our findings as a whole suggest that organizations should distinguish between target audience-building goals and audience-building goals per se, because pursuing the former will not necessarily lead to the latter.

Target-Audience Gains and Total Attendance

As seen in Table 15, successfully expanding the target audience was not associated with increases in the organization’s overall number of bookers between 2015 and 2019. Of the ten organizations that increased their target audience, five also saw gains of five percent or more in their total bookers (four organizations if we exclude comp-only bookers), while total numbers of bookers held steady or decreased for the others. Furthermore, among the five organizations that did not see target-audience gains, three still saw gains of five percent or more among their bookers, while two had losses.

Target-Audience Gains and Total Ticket Revenue and Measures of Financial Health

As would again be expected, given the small size of many target audiences within the organization and the fact that many attended less often than non-target audiences, we find no association between achieving target-audience increases and changes in the organization’s total ticket revenue. Nor was there an association between target-audience increases and changes in the measures of organizational financial health examined, such as total revenue, net revenue, assets, or net assets. This conclusion is based on comparisons of mean changes on these financial variables between 2015 and 2019 for organizations that did, and that did not, expand their target audiences.²⁵

McCarthy and Jinnett’s (2001) integrative approach to audience building, which informed the BAS initiative, emphasizes the importance of focusing audience building on a defined target audience.²⁶ Assessing the approach, Wiggins argued that audience-building activities aimed at one audience risk impacting other audiences in unintended and even negative ways.²⁷ We find no particular relationship—positive or negative—between target-audience outcomes and overall attendance. However, taken together, our analyses, both qualitative and quantitative, strongly suggest that target-audience building and audience building per se need to be distin-

Table 15
Total Audience Change by Target Audience Expansion: 2015–2019

Expanded Target Audience?	Change in Total Number of Bookers		
	Increase (5% or more)	Steady (change under 5%)	Decrease (5% or more)
Yes (10)	5 (4)	2 (3)	3
No (5)	3	0	2

Notes: Numbers in parentheses exclude comp-only bookers. For underlying numbers, see Appendix Table A1.

Read as follows: Of the ten organizations that expanded their target audience between 2015 and 2019, five saw increases of 5% or more in their total number of bookers, three saw decreases of 5% or more, and two held steady (i.e., change of less than 5%).

guished. Here, a question to ask is whether the organization's goal is to expand audiences or to expand a particular target audience? This is important because at least in the short term (and that short term may be many years) one may not yield the other.

Beyond the Target Audience: Change in Total Attendance, Ticket Revenue, and Organizational Finances

To this point, our focus has been on BAS organizations' efforts to attract a particular target audience. Here, we step back to consider changes in the fifteen organizations' overall audience between 2015 and 2019, and the relationship between changes in attendance and financial measures.

- What was the overall trend in total audience?
- Were there associations between changes in the organization's total audience, ticket revenue, and organizational-level measures?

We address both questions below.

Change in Total Attendance

Considering changes in total attendance between 2015 and 2019, a striking pattern emerges:

More people actually were attending, but they were attending less often. Indeed, the relationship between change in numbers of bookers and change in average number of productions attended per booker was negative and significant.

This conclusion is based on our examination of changes along multiple measures of attendance (see sidebar) and shown in Table 16.²⁸ As Table 16 shows, eight of the fifteen organizations—those at the top of the table—saw increases of five percent or more in their total numbers of bookers (the number drops to seven organizations if we exclude comp-only bookers). Four organizations, for instance, saw increases over 20 percent in their numbers of bookers.

However, while those eight organizations were gaining bookers, the average number of productions attended per booker declined. For instance, one organization had 25.6 percent more bookers in 2019 than in 2015, but on average bookers in 2019 attended 16.7 percent fewer productions than did 2015 bookers. As noted, the relationship between change in numbers of bookers and change in average number of productions attended per booker was negative and significant.²⁹ Furthermore, consistent with these findings and widely observed trends in the performing arts field, the numbers of subscribers were also declining (though organizations varied in the prevalence of subscribers in their audience base to begin with). In short, more people were coming, but they were coming less often.

From an organizational perspective, this pattern—increased bookers coupled with declining frequency of attendance—is more desirable than a decline in attendance. However, the implications for audience-building and financial health are profound:

Under this scenario, an organization would need to either: attract many more bookers just to fill the same number of seats that previously could be filled with a smaller number of bookers; find ways to attract deeper engagement; or find some combination of the two.

It remains to be seen how wide a pattern this is in the field, but these findings certainly suggest that an increasingly large part of the audience for these types of performing arts organizations are people who come only infrequently (at least over the course of one season). Yet our interviews suggest that such people are still primarily seen through the lens of not-yet-frequent attendees. The qualitative and quantitative findings, however, suggest that large numbers of audience members may not be going in that direction. And if that is the case, *incorporating this group for who they are, is an important consideration for audience-building strategies today even as organizations explore ways to more fully engage those who are receptive to additional engagement.*

Measuring Change in Total Attendance

We used multiple measures to explore attendance changes between 2015 and 2019:

- **Percent Change in Total Numbers of Bookers.** We calculated this twice: Once including all, and once excluding bookers who only obtained complimentary tickets.
- **Percent Change in Total Number of Tickets.** We calculated this twice: Once including all tickets, and once excluding complimentary tickets.
- **Percent Change in Number of Subscribers.**
- **Percent Change in Average Number of Productions Attended per Booker.**
- **Percent Change in Number of Main Season Productions and Percent Change in Number of Main Season Performances.** This is provided for context, since change in numbers of offerings could impact attendance. Note that some organizations had multiple facilities with different seating capacities and/or facilities with flexible seating capacity. Thus, change in numbers of offerings does not necessarily map directly to change in total season seating capacity.

Table 16
Percent Changes in Total Main Season Productions, Performances,
Bookers, and Average Number of Productions Attended: 2015–2019

<i>Percent Changes Between 2015 and 2019</i>							
Number of Productions	Number of Performances	Number of Tickets	Tickets (excluding comps)	Number of Bookers	Bookers (excluding comps)	Number of Subscribers	Mean Number of Productions Attended
4.7	1.3	6.6	1.0	25.6	23.3	-14.8	-16.7
0.0	-6.3	2.8	6.8	15.9	19.2	-17.4	-18.0
33.3	33.3	23.9	9.3	27.7	17.1	-20.0	-8.4
0.0	-6.9	-0.8	-3.4	9.5	11.0	-11.0	-10.0
0.0	-4.5	-4.6	-7.7	46.4	45.5	-50.5	-21.4
-6.8	-1.9	-6.5	-6.7	5.2	2.9	-0.3	-10.8
16.7	29.0	53.9	58.0	56.8	82.3	>100 ¹	-18.8
14.3	-2.0	-5.8	-9.1	16.6	14.2	-16.3	-8.8
0.0	3.8	-7.7	-4.4	-9.1	-6.8	-15.1	-2.2
0.0	4.0	-5.3	-5.4	1.7	1.5	-16.1	-8.1
0.0	-7.0	-3.6	-1.1	-6.6	-6.2	-2.3	5.9
9.1	0.7	4.8	5.5	1.1	1.9	14.3	1.8
-12.5	-4.9	-20.0	-22.1	-22.4	-23.2	-2.8	5.2
11.5	15.2	-26.5	-33.8	-31.1	-32.0	-27.4	6.9
40.0	3.3	-13.3	-17.2	-13.7	-15.7	-21.8	1.8

Source: Organizational ticket databases

Notes: Increases of 5% or more are shown in green, and decreases of 5% or more are shown in red, with the exception of percent changes in productions and performances, which are provided by way of context. Increases and decreases in excess of 100% are indicated as >100.

¹Less than 1% of the organization's bookers were subscribers in 2015, accounting for this high percentage change.

Read as follows: The organization in the first row presented 4.7% more productions and 1.3% more performances in its 2019 season than in 2015. Between the two years: Ticket sales increased by 6.6% (and by 1.0% excluding complimentary tickets); the number of total bookers increased by 25.6% (and by 23.3% excluding comp-only bookers). The number of subscribers declined by 14.8%, and the average number of productions attended per booker declined by 16.7%.

Changes in Attendance, Ticket Revenue, and Measures of Organizational Finances

As we have seen, target-audience gains were not associated with total revenue or measures of organizational financial health. But what about changes in an organization's total attendance—were these associated with changes in financial indicators between 2015 and 2019? Key findings:

- Change in organizations' total number of bookers (excluding or including comps) was positively associated with change in ticket revenue. Change in ticket sales was also positively associated with change in ticket revenue.³⁰

- We found no correlation between changes in the number of bookers, tickets sold, or ticket revenue and any of the following organization-level financial measures: revenue, net revenue, assets, or net assets.³¹

Our findings are consistent with Baumol and Bowen's (1965) influential "cost disease" theory. According to that theory, nonprofit performing arts organizations cannot generate enough earned income to cover their costs, even with strong ticket sales, and, therefore, require philanthropic or other subsidy to fill the gap.³² Our data do not permit us to assess whether the patterns in these data are due to the inherent

cost structure of the performing arts as posited by the theory or due to some other cause. What we can say, though, is that these organizations almost inherently pursue mission-related goals that are not determined in the first place by maximizing audience or ticket sales per se—but rather by efforts to maximize audience and ticket sales for programs they see as central to their mission.

Conclusion and Implications

A widespread early goal of BAS participants was to better understand their current and intended audiences. Working within a continuous learning framework that emphasized data, experimentation, and re-assessment, they often surfaced unexamined and unfounded assumptions that were impeding their efforts to communicate with the very constituencies they sought to reach. A common theme here was that they were speaking in ways meaningful to themselves and others in their field but not to those they seek to reach. Thus, the theater cared about something being a world premiere, the performing arts presenter put aesthetic concerns first—but the audience did not. Some organizations launched programming supposedly appealing to a particular audience, only to find it held no such appeal. Further, as one dance company interviewee said, “It’s very easy to make incorrect assumptions that are consistent with your building, your time, the staff available time.”

An overarching implication of the BAS organizations’ experience is that these assumptions exist, and they need to be examined and addressed. Otherwise, arts organizations risk talking past, rather than speaking with, those they want to reach. That said, this may be a stance that does not come easily to large, established nonprofit arts organizations that have in the past, perhaps, been more able to take their prestige for granted or rely on a steady stream of subscribers willing to commit to a season program curated by the organization. One interviewee said with some exasperation:

There’s a mentality in the arts that if we build it, they will come. There’s a mentality that we know better than the audiences what they should like. . . . “You need to sit in the seats and love what we do.” There are people who give great speeches about how, just trust that the audiences that like what you like will find you. I mean it’s like, I just want to throttle those people.

To the extent that this is true, it is clearly not an attitude conducive to the self-questioning and efforts to understand others’ point of view that proved so important. However, for those seeking ways to engage more deeply and with more people, what is positive is that organizations have the ability to effect change in this area. Many BAS participants did just that and changed their language and approach based on what they learned, with positive results.

Arts organizations, whether in an initiative or not, can also subject their assumptions and language to scrutiny by speaking with, and listening to, those outside their organizations who they hope to reach. A number of organizations also found that gaining greater facility with digital forms of communication helped them communicate more often

and more effectively with multiple constituencies. As we saw, both of the organizations in our outcomes study that focused on attracting audiences to less familiar works saw audience gains. Both of those organizations changed communications to be more responsive to what they learned people wanted to know before deciding to attend—and both found digital communications, including advance video trailers, helpful in this regard.

The results of these audience-building activities, however, also raise questions about organizational change. One important issue for organizations to consider beforehand is whether they are seeking to engage with particular audiences, even if it involves changing their programming, or whether they are seeking audiences for what they already do. As discussed, organizations were repeatedly disappointed by crossover strategies, where new programming was intended as a gateway to traditional programming. However, developing new programming was embraced by organizations that found value in attracting new audiences even to separate programming or that felt that program diversification strengthened their artistic mission, community engagement, and/or business approach.

A framework that implicitly informed much audience-building activity was that new audiences would be attracted and then move along what one interviewee called the “long slow escalator” to subscriber and then donor. Our analyses of attendance trends, independent of target audience, found growth in audience coupled with declines in frequency of attendance, at least at the same organization. Likewise, organizations generally felt they had less success in encouraging repeat attendance, and neither one of the organizations in the outcomes study who focused on increased attendance among infrequent attendees saw such gains. While there is much to be researched about this, our findings suggest a high likelihood that there is a large and growing percentage of audience who will come to see a production but will not transform into the hoped-for frequent season attendee, at least to a single organization. If that is the case, then audience-building strategies need to accept and incorporate infrequent attendees as just that, even as they also seek ways to more deeply engage those with the potential to be more deeply engaged.

Finally, with respect to the BAS initiative’s question about whether audience-building contributes to financial health: For large nonprofit performing arts organizations of this type, it seems clear that audience-building efforts can just as readily be efforts requiring additional revenue, as they can be generators of revenue. In a sense, then, there was a mismatch between the initiative’s exploratory question and many of its projects. Few of these organizations expected or prioritized substantial earned income gains from their audience-building activities, at least in the short term. And, for a number, the goal is to reduce the costs of attendance through subsidies, not to generate earned income from it. For at least some of these organizations, profitable productions that attract large audiences are approached more along the lines of a concession to financial realities, rather than as audience-building successes. Instead, they especially seek audiences for productions they view as artistically important and mission-centered but that are not necessarily the ones that would attract large audiences. These large nonprofit arts organizations continue

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to see philanthropy as a key source of financial sustainability in relation to their mission.

These findings suggest that economic assessments of audience building and nonprofit performing arts finance should be viewed against a larger framework that incorporates how arts organizations think about financial sustainability. Baumol and Bowen's influential "cost disease" theory argues that nonprofit performing arts organizations cannot generate adequate earned income to cover costs, even with strong ticket sales, and, therefore, require philanthropic or other subsidy to fill the gap.³³ But as we have seen, earned income is not paramount for such organizations in the first place. They pursue programming seen as key to artistic mission and try to

generate audiences for this, whether or not such programming maximizes earned income, and look to philanthropic support to sustain these efforts. Much remains to be explored about the relationships between audience building, earned income, and philanthropy, and that includes the sustainability of the philanthropic framework in which these organizations function.

What this initiative does illustrate clearly is that organizational sustainability, financial sustainability, and audience sustainability are intertwined in complicated and important ways. And, further, that audience building and sustainability are fundamental goals for the ongoing relevance of organizations and their art forms.

Appendix: Data Sources Collected

This study employed multiple methods and data sources and involved three major data collection efforts: open-ended interviews with BAS grantee organizations and staff; data on those obtaining tickets (“Bookers”) from organizational ticket databases; and a survey of bookers to BAS organizations. The interviews, part of the original research plan, were conducted between 2015 and 2022. Due to lack of available outcomes data and changes in the BAS initiative implementation, additional data collection efforts were later incorporated (2018-2021) to obtain the quantitative data needed to assess outcomes.

The purpose of this appendix is to describe key characteristics of data sources, data collection processes, data cleaning, and survey weight construction related to this report’s analyses. Presentation of the quantitative data collection, given the multiple different sources involved and complexities of the process, requires a longer discussion. However, both qualitative and quantitative data collection components were essential.

Data Source: Qualitative Interviews

Between late 2015 and early 2022, we conducted three rounds of personal interviews with leaders and staff at the BAS organizations. Interviews explored how BAS participants implemented their projects, their perspectives, experiences, and how audience-building efforts related to broader organizational goals, mission, and values. These were structured and primarily open-ended interviews. Round 3 interviews also utilized close-ended items with scales, asking respondents to rate the prevalence and/or importance of certain items (such as how important a variety of activities were to their project).³⁴ We informed interviewees beforehand that interviews would be confidential, that our study was strictly separate from any monitoring or reporting to the foundation about the grant, and that results of individual interviews would not be shared with The Wallace Foundation or its grants managers.

Interviews were conducted at the early stage of the initiative, the mid- to late stage, and then after the initiative’s conclusion. This allowed us to follow the development of the organizations’ work and thinking about their work and the initiative, at different points. For instance, early interviews explored such topics as why organizations had chosen their particular target audiences, their project expectations, and participant’s broader thinking about audience building, as well as the organization itself.³⁵ Well into their projects, the second round of interviews explored such topics as challenges around implementation (and how these were handled), assessments of what aspects of their approach were more or less successful, what they were learning, and their experiences with using data and market research (which heavily informed the initiative’s approach and was the subject of an earlier project publication). The first round of interviews was conducted primarily in person at the organization. The second round was conducted primarily via phone or Skype.

The third round of interviews revisited some similar themes from the earlier interviews, but now explored experiences during the final stages of the project and interviewees’

reflections on their projects as a whole, including their own assessments of outcomes regarding audiences, finances, as well as on the organization itself (e.g., in terms of using data in decision-making, an important part of the initiative). A particular focus of the third round was to understand whether and which aspects of their audience-building activities had been continued and which discontinued (and why). The topic was central since the initiative goal was not development of “one off successes” but sustainable activities beyond the life of the grant.

We did indeed ultimately explore these areas. However soon after we launched our interviews, in early 2020, plans for Round 3 interviews would be revised in the face of the COVID-19 pandemic. We deferred the interviews (excluding one organization interviewed pre-COVID) until 2021, shifted from in-person to Zoom, and revised our protocol in light of the dramatic developments since the end of the initiative. We introduced some questions related to COVID-19 impacts, including whether anything from the initiative had proved applicable during the pandemic. We introduced other questions related to protests against racial injustice, which included calls for arts organizations to change to achieve greater diversity, equity and inclusion (e.g., whether and how organizations were responding, including implications for their audience-building activities).

In all, we conducted 301 interviews. Leaders and staff at all 25 organizations were interviewed in rounds one and two, and from 24 organizations in round three.³⁶ Because we wanted to understand different perspectives that might be involved and because different people had different relationships and involvement, we interviewed people holding different positions at the organization including the following positions or equivalents. In round one, we interviewed: executive director/CEO, artistic director, project manager (generally from marketing), chief financial officer (or other person responsible for tracking the finances of the BAS project for the organization), board chair/president, and others suggested by the organization (the largest number of which were in Round 1). In Round 2 we interviewed the project manager, executive director/CEO and artistic director or equivalent. In Round 3 we again interviewed the wider array of roles.

Note that organizations varied in their structures and their division of responsibilities within the initiative. Some organizations combine, while others separate, the top administrative and artistic positions—so these might be the same or different individuals. In some cases, artistic directors were very directly involved in project-related artistic programming, so we would interview them. The table below summarizes the number of interviews and periods over which the interviews were conducted.

As noted, we interviewed a smaller range of positions in Round 2, but numbers are also lower in Round 3 than Round 1 due to staff turnover (and one organization’s declining to participate). Turnover in leadership and staff was already evident in Round 2, so much so that it became an item we asked about in interviews. In the case of the additional turnover between Rounds 2 and 3, however, this might involve new people who were involved in the later stages of the initiative—or who might even have come after the conclusion of the initiative. At one end of the spectrum were five organizations

where the executive director, artistic director, and project manager during Round 1 were still there in Round 3. At the other end of the spectrum were four organizations where the artistic director, executive director, and project manager had all departed since the previous round. Sometimes, however, the turnover had occurred while the project was still underway, so we might be speaking with the person who served as project manager or executive director in the final stages. But even there, circumstances varied, with some having been at the organization and involved with the initiative since early stages, while others might lack such firsthand experience. In one case, for instance, an executive director came during later stages and made significant changes to the initiative, which proved a focus of our conversation.

In short, we had to assess what the nature of the turnover had been and determine, in conversation with the organization, who the appropriate people would be for our questions in circumstances where the appropriate people were less evident (including considering those at the organization in other roles who had been involved with the initiative). There was, however, one strategy we could and did use to facilitate learning about what aspects of the initiative were being sustained, even in the few cases where no one remaining at the organization could be expected to be fully familiar with those activities. We compiled, from our previous interviews and from our review of final reports submitted by the grantees to The Wallace Foundation, a list of activities we knew to be part of that organization’s activities. We could, therefore, as needed, list them for the interviewee, who could tell us whether the organization was sustaining these and how—even if they might not have been aware of their connection with the BAS project. However, in terms of sustaining audience-building activities, turnover is not just a methodological challenge for a study, but an organizational reality.

Outcomes Study Data

The BAS initiative explored whether one group of nonprofit performing arts organizations could engage new audiences while retaining existing ones and whether audience-building efforts were associated with organizations’ financial health. To answer that question, quantitative data were needed, including data on changes in target audience, total audience, as well as the financial implications of these changes. As noted, due to the lack of availability of such data and changes in initiative implementation, our study was accordingly expanded to include two major quantitative collection efforts: compiling data from organizations’ ticket databases and fielding a short survey.

The databases provided data on overall attendance, attendance at series particularly related to an organization’s BAS project (where applicable), financial indicators (e.g. ticket price data), and a source from which to draw samples of those obtaining tickets (“bookers”) for a short survey that would collect data on audience demographics and reasons for performing arts attendance. Sixteen out of 21 potentially eligible BAS organizations participated.³⁷ The technical challenges of these data collection efforts were substantial. In this Appendix, we focus on the major components of the efforts and the data components related to analyses in this report.

Our research question had to do with audience change over time. Therefore, we needed audience data from two time periods—a “pre” and a “post” period. We selected the 2014-2015 main season (hereafter referred to as the 2015 season) as the “pre” period, since it was the season immediately prior to the start of the BAS initiative. We chose the 2018-2019 main season (hereafter the 2019 season) as the “post” period, since BAS projects concluded that season (it also proved to be the final season not impacted by COVID-19 closures). Season start and end dates vary among the organizations but mostly started in Fall (or late summer) and ended in Spring (or early summer). We decided to focus on the overall season because the BAS initiative focused on attracting and retaining audiences, not just “one off successes.” An analysis that did not keep the entire season in sight might mistakenly draw conclusions based on performances or productions with atypically high or low attendance (by either the target audience or the overall audience).

Some organizations only had main season productions, while some had other performances, though what these were differed considerably (e.g., performances by students in an organization’s school, a summer series, etc.). Focusing on the main season provided comparability across organizations. However, there were some organizations where non-main season series were important parts of their audience-building projects—typically with the hope that target-audience attendees attracted to these special series would go on to attend main season productions. In such cases, we analyzed both main season audience changes *and* the special series. Note, however, that these other (non-main season) series mostly did not exist in the “pre” period, so our primary point of comparison for them is with other main season audiences in the “post” period.

Number and Timing of Interviews

Round	Orgs* (N)	Interview Period**	Interviews (N)
1	26	11/2015-09/2016	152
2	25	12/2017-07/2018	65
3	24	04/2021-05/2022	84
Total			301

*The BAS initiative initially included 26 grantees. One grantee exited the initiative, bringing the number of grantees to 25. All 25 were in Round 1 and Round 2 interviews, and 24 were interviewed in Round 3 (one declined to participate).

**In Round 3 one organization was interviewed in early 2020, prior to COVID-19.

Ticketing Databases

The organizations store their ticketing and audience information in Customer Relationship Management systems (CRMs). The particular CRMs used varied, though most used Tesitura. Although there were commonalities, there were also variations in data storage procedures among organizations, even those employing similar CRM systems. Furthermore, organizations sometimes changed their information storage procedures in different years. Therefore, data could not simply be mechanically extracted. Instead, we had to understand each organization's storage protocols, codes, any changes over time, and potential challenges. Since the data themselves were stored in specialized CRMs, we contracted with a firm that specializes in ticket databases to extract the data, with the organizations' permission. We had extensive conversations with the organizations beforehand and additional subsequent discussions about the data as needed.³⁸

One critical, but challenging task from the outset, was to accurately identify and classify distinct productions and performances. Organizations store information about many different types of events in their databases, not just artistic productions. For example, one organization's database included musical performances and various non-performance events (e.g., "backstage tour," "wine auction," "sandwich meals"). Another organization's database included a large number of tickets for productions put on by other companies that had rented the institution's venue (and which the institution did not consider to be "theirs"). Furthermore, while some organizations assign different numbers to unique productions and performances, others do not. Indeed, one organization used the same production number for an entire season. A major part of our data collection and preparation process was to identify and classify unique productions and performances, and later to assign each a new and unique identifier.

Thus, prior to extracting further data, we first received listings of all the "productions" in the databases for eight seasons (2011/2012 through 2018/2019). We created a general schema to use to classify the items: Main Season Performance, Non-main Season Performance, and Other (non-performance) items. For organizations that had a series or productions with a special relationship to their Wallace project, we added additional categories to the classification used for that organization so that we could readily separate these out for sub analyses.

We reviewed every production and created preliminary classifications (based on the name, reviews of organizational websites for season production listings, as well as supplemental Google searches). We then provided our classifications to the organization for review and comment. The numbers of productions and performances varied dramatically among organizations (e.g., five main season productions with under 30 performances in one case; over 50 main season productions and 100 performances in another).

We sought to maintain comparability between organizations to the extent possible. Of key importance, however, was ensuring comparability of data for the same organization over time. This was fundamental to ensuring that any attendance changes identified were genuine, rather than artifacts of shifting organizational or data storage practices between years.

For instance, some organizations separated their ticket prices from ticket fees and stored each in separate fields. Others combined prices and fees. Some, however, did it differently in different seasons. Therefore, we created a variable that combines the fields to achieve comparability across years for analyses of ticket revenue.

Many data issues encountered were specific to individual organizations and had to be addressed on an individual basis. For instance, during one season, one organization stored some ticket sales to identical performances as tickets to different performances, depending on the seating section. Consequently, 40 seeming performances were actually 20 performances, so we had to "reunite" those performances in the coding. At another organization, we noticed tickets stored for performances occurring at unlikely times and with very low ticket counts. Upon speaking with the organization, we learned that these were not real performances, but were placeholders for tickets that were issued, but unused. We created flags to exclude these and other invalid performances from performance counts (tickets are still included in ticket counts).

While still requiring careful review and cleaning, identifying and addressing issues at the production level were more straightforward to assess and resolve, than issues at the performance level. In only one instance did we find a production that had not occurred. In the end, we felt more confident about data at the production level than we did about data at the performance level. We did extensive cleaning of main season performance data, which were important at the aggregate level to consider changes in attendance relative to numbers of available performances, but we ultimately decided to focus analyses at the production level.

One issue that bears mentioning at the production level was "productions" that proved to be placeholders to store unused tickets from season passes. This occurred at five organizations. We exclude these from counts of season productions, since they were not genuine productions, nor was it possible to know which productions they would have been used for. At the same time, these were tickets that had been sold—and it was likely there were other tickets in the database purchased but not actually used (but not recorded as unused since they were not part of a pass). Therefore, we included them in counts of overall tickets.³⁹ Less clear was how to handle these when counting the numbers of productions that individuals obtained tickets for. In the end, and after assessing the impact of different approaches, we developed a rule: Add one additional production to the individual's count of productions if an individual had unused pass tickets, unless doing so exceeded the total number of season productions at the organization.

In conclusion, these ticketing databases provided a large and rich source of data—and without them we could not have assessed audience change. However, these CRMs were not created for researchers, but for organizations to use for their own purposes, and they were subject to organizational vicissitudes. It became clear that we could not clean everything in these data and that some data would likely not be appropriate for our analytic purposes. Therefore, we focused our efforts on the key data elements that were relevant for our analyses and where the elements either were (originally or after cleaning) of adequate consistency and quality to be used for our research purposes.

Survey

The majority of BAS organizations defined their target audiences in demographic terms. The ticket databases could be used to examine whether overall attendance had increased but not to assess changes in particular demographically defined target audiences. That required a survey to collect audience demographics during the “pre” and the “post” periods. In brief, the survey involved the following major components:

- Drawing 32 samples of bookers (two samples for each organization, one for the 2015 season and another for 2019).
- Identifying overlaps in sample membership (within and between organizations), removing multiples from the list of those to be sent the survey, creating crosswalks to bring them back in later and backfill their data.
- Creating and fielding a brief online survey instrument (between late December 2020 and early July 2021) to collect data on demographics and reasons for attendance.
- Creating post-survey weights for analyses.
- Preparing the dataset for analysis (e.g., data cleaning, re-inserting records for those in multiple samples, new variable creation, etc.).

Sampling⁴⁰

Using the databases, we first identified bookers that attended a main season production during 2015 and those who attended one in 2019. Most bookers were individuals or households, the focus of this study. However, bookers did include some organizations (e.g., third party ticket resellers) that were removed from the sampling frame.⁴¹ We then drew a random sample, stratified by number of productions attended,⁴² drawing approximately 10,000 people per organization (or more, in cases where supplemental samples or oversamples were present as discussed below) for 2015 and 2019. In instances where organizations had fewer than 10,000 bookers for the season, we included everyone, making it a census rather than a sample.

As noted, some organizations created special series they thought would attract the target audience, often hoping (at least initially) that target-audience members would start to attend other offerings. Thus, we sought to have adequate numbers of audience members to permit sub analyses of these series, whether they were part of the main season or not. In cases of special series outside the main season, we drew separate supplemental samples of their bookers. For special productions that were part of the main season, if the main season sample had not yielded adequate numbers for separate analyses, we then oversampled.

The 32 separate samples were then combined into one list for purposes of survey administration. In all, this produced a list of 262,399 sample members. However, one of the major issues that had to be addressed prior to finalizing that list was the large number of people who appeared in multiple samples (within the same organization for 2015 and 2019, and/or across organizations). It was important to avoid sending

people duplicate communications. At the same time, they were valid members of different samples that were going to be separately analyzed. Therefore, we removed multiple listings. Then, using a system of codes and ID numbers, we created a crosswalk so that we could later match them back to the other samples where they belonged and add their information. Removing the duplicate listings, along with removing some additional bad records that were identified⁴³ resulted in a list of 219,083 unique sample members to be invited to participate in the survey. Given the large size of the study, sample members were randomly divided into 100 replicates (i.e., 100 randomly assigned groups) for flexibility in timing of sample release and to better monitor results over time.

Fielding the Survey

As noted, we launched the survey with a small percentage of sample to track the results and assess response. Given the large size, we contracted with a specialized survey firm to implement the survey. In the hopes of boosting responses, we kept the survey brief (intended to take under five minutes), sent an invitation letter explaining the study, provided a contact email for respondents to ask us questions, and followed the initial email with up to four reminders (unless the respondent opted out). This was an online survey and invited respondents to participate via email. To avoid potential bias introduced by excluding the minority of the sample without an email, we sent an initial postal mailing to those without an email, which provided a URL for them to take the survey. This postal mailing seemed particularly warranted since age, which was the basis for many target-group definitions, might have an association with having an email address. As discussed below, however, we would dramatically increase the use of postal mail. Timing and circumstances would unfortunately leave us in the position of needing to launch the survey at the end of December 2020, when performing arts events were widely suspended due to COVID-19 closures.

Soon after the initial release of the first five replicates, we noticed an odd development: Survey response dropped sharply after the release of the third replicate. An analysis of the email addresses of respondents versus non-respondents, by replicate, indicated that emails sent to Gmail addresses were less likely to respond after release of the third replicate, indicating they were being flagged as spam. In-house emailing experiments provided further confirmation. We tried adjustments to our emailing approach (e.g., sending emails in smaller batches, changing email address, sending a text only email, etc.) but these did not work. We therefore increased use of postal mail—sending a postal letter reminder to those initially contacted by email who had not responded. The postal mailing proved instrumental in obtaining adequate responses for analysis and reaching people with Gmail addresses (as indicated by the rise in their responses following the postal mail).

Completion Rates

We report a *completion* rate, rather than a response rate, due to the nature of our study and population. Completion and response rates both involve calculating a ratio where the number of survey responses is the numerator. The difference

comes with the denominator. Response rate calculations generally remove individuals who could not be contacted (e.g., due to bad contact information, deaths, etc.), whereas completion rates leave them in the denominator. The completion rate, then, is inevitably at or lower than a response rate. To be sure, there were many thousands of sample members who could not be reached (due to email bounce backs, returned mail, etc.), and there is no way to know how many more there may have been. Still, the research sought estimates about audiences at specific points in time, and sample members were part of that audience whether or not they could be reached. Thus, we used the more conservative completion rate and left everyone in the denominator.

The completion rate was 7.8 percent overall (20,573/262,399).⁴⁴ It was slightly higher for the 2019 sample: 8.1 percent for the 2019 sample versus 7.6 percent for the 2015 sample. The completion rate for individuals who were sampled in both years was 13.2 percent. That said, while administered together, this was a survey of 32 different samples from two years and 16 organizations, and completion rates did vary. In 2015, they ranged from 5.8 percent to 10.6 percent, and in 2019 they ranged from 6.6 percent to 12.0 percent. In 15 of the 16 organizations, we received a large enough number of responses from both time periods for analysis. Unfortunately, the sixteenth and smallest organization (with the lowest numbers of bookers to sample from) yielded too few responses for analysis.

As the figures indicate, and unfortunately consistent with widespread survey research trends,⁴⁵ our survey response was low. Survey research guidelines caution against presenting response rate as the “primary arbiter of survey quality” and emphasize the importance of also addressing two other factors: nonresponse bias, and missing data.⁴⁶ We discuss handling of nonresponse bias (through survey weights) as part of our discussion of survey weights. We discuss missing data levels (which were low) as part of our discussion of the key survey variables used in this report.

Weighting the Data

In order to provide more accurate estimates of the population under study, we utilized post-survey weights for analyses of the survey data. As noted, the stratified random sampling allowed a greater probability of selection to more frequent attendees. Additionally, frequent attendees, and those who were in both the 2015 and 2019 samples, had higher survey response rates (i.e., a nonresponse bias). Thus, weights were created that adjusted for differential probabilities of selection and the greater propensity for frequent attendees to respond—to align our sample back to the population.

This report presents analyses that employ a “booker” weight and a “production” weight. Both of these weights correct for nonresponse bias. Having done that, however, the booker weight adjustment treats all bookers as counting equally in analyses, regardless of how often they attended. For instance, to estimate the percentage of ticket purchasers who were 25-40 years old in 2015 or 2019, the analysis should be weighted using the booker weight. Understanding the percentage of bookers from the target audience, regardless of how often they attend, is one important lens through which to

assess changes in attracting members of that group.

However, the composition of the organization’s actual audience for the season is impacted by both who attends and how often they attend. Imagine, for instance, that 15 percent of the bookers turn out to be 25-40 years of age. In one scenario, this group attends an average of one production a season, and in another scenario, they average four productions. The percentage of 25-40-year-olds who attended a production at the organization is the same in both cases—but 25-40-year-olds clearly will constitute a larger percentage of total season audience (who is “in the seats”) in the latter scenario. To examine audience building through this second lens, we use the production weight, which gives respondents different weights in the analysis depending on how many productions they attended.

Operationally, weights were created through the following steps. Note that weights had to be constructed separately for each organization (and then once each for the 2015 and 2019 samples). The logic and steps to compute these, however, were the same and are described below.

• *Booker Weight Creation:*

- Sample members were initialized to have booker weight equal to one.
- Bookers who were in both the 2015 and 2019 samples were more likely to complete the survey, so the booker weight was adjusted to account for the lower response rate among bookers sampled in only one year. These adjustments set the proportion of bookers who attended a main season event in both years equal to the proportion in the full sample file.
- Bookers who attended more main season productions had a higher chance of being sampled and were also more likely to participate in the survey. Therefore, the booker weight was adjusted to align the proportions among survey respondents with the proportion from the full sample frame.
- Booker weights were normalized so that the weighted sample size equals the number of survey interviews for that year.

• *Production Weight Creations:*

- Production weights were created from the booker weight, by increasing the weight for those who attended more productions. The production weight is equal to the booker weight multiplied by the number of main season productions booked.

As discussed earlier, in addition to our main season samples, we drew subsamples of non-main season productions bookers for series with a special relationship to the organization’s BAS project. A parallel, supplemental set of booker weights proved necessary for analyses involving those supplemental samples, and comparisons between them and main season samples. These supplemental weights correct for an over-representation of attendees at these special productions who also attended a main season production, by

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adjusting the proportion of supplemental attendee respondents who did not attend a main season event to match the overall proportion in the population. Supplemental booker weights are normalized so that the weighted number of main season attendees and supplemental attendees sum to survey sample size.

Demographic Variables Used in this Report

This section discusses the development of the main demographic variables (age, race, and Hispanic origin) that were key for determining target audiences and changes in them. The overwhelming majority of survey respondents answered the demographic questions (between 97.7 percent and 99.5 percent for the different questions). Thus, there is little missing data.

Age was the most widely used basis for target-audience definitions. All the organizations with age-based targets sought younger audiences, but specific age ranges/target definitions varied. Seeking the greatest flexibility for later coding, we asked “what is your age.” Among those in the 2015 sample, 99.4 percent replied, as did 99.5 percent in the 2019 sample.⁴⁷ Since the survey was conducted in 2021, we subtracted two years from the age for 2019 sample members and six years for 2015 sample members to arrive at age at time of attendance. Then, for each organization with an age target, we created a dummy variable indicating whether the respondent was a member of the target-age group. Ad-

ditionally, we created a generation variable for all organizations based on Pew Research Center categories⁴⁸ and coded in the same way across organizations.

Data used to examine target audiences based on race/ethnicity-based definitions were gathered from two survey questions:

- “Are you of Hispanic, Latino/a, or Spanish origin?”
- “What is your race? *Please select all that apply.*” Choices provided were: White; Black or African American; American Indian or Alaska Native; Asian; Native Hawaiian or Other Pacific Islander; Other (please specify).⁴⁹ As the question indicated, respondents could select multiple categories and/or write in a different response.

Among respondents in the 2015 sample, 99.5 percent answered the question on Hispanic origin, as did 99.7 percent of 2019 sample respondents. For the question on race, 97.9 percent of the 2015 respondents and 97.7 percent of the 2019 respondents provided a usable response. We use the term “usable” response because additional respondents provided answers but did not specify their race (e.g., “human”) and are, therefore, counted as missing data. As with age, for each of the organizations with a target defined in terms of race/ethnicity, we created dummy variables to indicate whether a respondent was a member of the target audience as defined by that organization.

**Appendix Table A1
Percent Changes in Main Season Attendance, Tickets, and Organizational Finances: 2015–2019**

Target Audience Growth?	% CHANGE IN PRODUCTIONS, PERFORMANCES AND TOTAL ATTENDANCE										% CHANGE IN ORGANIZATIONAL FINANCES						
	N Prods	N Perfs	N Tickets	Tickets EC	N Bookers	Bookers EC	N Subscr	Mean N Prods Attd	Ticket Revenue	Surplus or Deficit 2015/2019	Org Rev	Org Exp	Org Assets	Net Assets	Net Revenue	Dollars Contrib	
Y	4.7	1.3	6.6	1.0	25.6	23.3	-14.8	-16.7	3.1	D/D	-7.4	-6.0	-25.0	>100	-7.9	-3.5	
Y	0.0	-6.3	2.8	6.8	15.9	19.2	-17.4	-18.0	26.1	S/S	4.7	-0.2	-9.4	-13.4	-73.7	-27.8	
Y	33.3	33.3	23.9	9.3	27.7	17.1	-20.0	-8.4	22.5	D/D	-7.7	8.8	-0.6	-22.6	>100	-2.3	
Y	0.0	-6.9	-0.8	-3.4	9.5	11.0	-11.0	-10.0	-4.7	S/D	-18.4	14.5	12.6	13.4	>100	-29.1	
N	0.0	-4.5	-4.6	-7.7	46.4	45.5	-50.5	-21.4	-0.6	D/S	-21.6	-28.1	-3.2	14.5	>100	67.3	
Y	-6.8	-1.9	-6.5	-6.7	5.2	2.9	-0.3	-10.8	-1.1	S/S	0.8	21.5	-6.8	-66.7	-96.8	-6.5	
N	16.7	29.0	53.9	58.0	56.8	82.3	>100 ¹	-18.8	68.3	S/D	-44.6	17.2	-8.5	-10.9	>100	-53.2	
N	14.3	-2.0	-5.8	-9.1	16.6	14.2	-16.3	-8.8	-9.0	D/D	3.9	5.9	0.0	1.5	-32.8	10.9	
Y	0.0	3.8	-7.7	-4.4	-9.1	-6.8	-15.1	-2.2	-1.5	S/D	7.8	26.4	-2.8	-3.1	>100	-3.0	
Y	0.0	4.0	-5.3	-5.4	1.7	1.5	-16.1	-8.1	7.4	S/D	-32.3	11.9	-6.8	-14.5	>100	-56.2	
Y	0.0	-7.0	-3.6	-1.1	-6.6	-6.2	-2.3	5.9	6.2	S/S	14.2	-2.4	4.9	28.2	>100	36.6	
Y	9.1	0.7	4.8	5.5	1.1	1.9	14.3	1.8	27.6	S/D	8.9	32.1	-23.2	-91.4	>100	6.4	
N	-12.5	-4.9	-20.0	-22.1	-22.4	-23.2	-2.8	5.2	-17.0	S/D	-1.1	15.1	38.7	48.7	>100	5.4	
N	11.5	15.2	-26.5	-33.8	-31.1	-32.0	-27.4	6.9	-27.2	S/D	-28.3	2.3	5.7	-5.2	>100	-28.1	
Y	40.0	3.3	-13.3	-17.2	-13.7	-15.7	-21.8	1.8	-15.7	S/S	70.5	21.1	>100	92.5	>100	60.6	

Read as follows: Between 2015 and 2019, the first organization increased its target audience. The organization presented 4.7% more productions and 1.3% more performances. The number of tickets issued increased 6.6% (and 1% excluding comp tickets). Numbers of total bookers increased by 25.6% (23.3% excluding comp-only bookers). The numbers of total subscribers decreased by 14.8%, and the average number of productions attended per booker decreased by 16.7%. Ticket revenue increased by 3.1%. Turning to organization-level financial measures: The organization had deficits in 2015 and 2019. Organizational revenues decreased by 7.4%.

expenses decreased by 6%, assets decreased by 25%, net assets grew by over 100%, net revenue decreased by 7.9% and dollars contributed decreased by 3.5%. Note that numbers in excess of 100 are indicated as >100.

Increases of 5% or more are shown in green and decreases of 5% or more are shown in red, except for the expenses column. Here, increases are generally not desirable so we reverse colors, showing increases in red and decreases in green.

Column Headers

Columns refer to percent changes between 2015 and 2019 Main Seasons

- Number of Productions
- Number of Performances
- Number of Tickets
- Tickets Excluding Comps
- Number of Bookers
- Number of Bookers Excluding Comps
- Mean Number Productions per Booker
- Ticket Revenue
- Surplus or Deficit - 2015/2019
- Organizational Revenue
- Organizational Expenses
- Organizational Assets
- Net Assets
- Net Revenue
- \$ from Grants and Contributions

Data Sources

- Season statistics are calculated from ticket databases
- Increases in target audience are based on data from The University of Texas at Austin Building Audiences for Sustainability Research Study survey and from ticket databases
- Organizational finances are calculated from IRS forms 990 for FY 2015 and FY 2019: Line 12-Total Revenue, Line 18-Total Expenses, Line 20-Total Assets
- Surplus or Deficit determined by subtracting Total Expenses from Total Revenues
- Net assets and net revenue calculated using absolute denominator values (due to some negative denominator values), yielding the same number, but ensuring losses appear as negative and gains as positive

Footnote 1: Under 1% of audience members were subscribers in 2015

Endnotes

1. *A Decade of Arts Engagement: Findings from the Survey of Public Participation in the Arts, 2002–2012*, NEA Research Report Number 58 (Washington, D.C.: National Endowment for the Arts, 2015), <https://www.arts.gov/sites/default/files/2012-sppa-jan2015-rev.pdf>; and *U.S. Trends in Arts Attendance and Literary Reading: 2002–2017: A First Look at Results from the 2017 Survey of Public Participation in the Arts* (Washington, D.C.: National Endowment for the Arts, 2018), <https://www.arts.gov/sites/default/files/2017-sppapreviewREV-sept2018.pdf>
2. *A Decade of Arts Engagement: Findings from the Survey of Public Participation in the Arts, 2002–2012*, NEA Research Report Number 58 (Washington, D.C.: National Endowment for the Arts, 2015), <https://www.arts.gov/sites/default/files/2012-sppa-jan2015-rev.pdf>; and *U.S. Trends in Arts Attendance and Literary Reading: 2002–2017: A First Look at Results from the 2017 Survey of Public Participation in the Arts* (Washington, D.C.: National Endowment for the Arts, 2018), <https://www.arts.gov/sites/default/files/2017-sppapreviewREV-sept2018.pdf>.
3. Data on annual expenses and contributions are from IRS Forms 990 for Fiscal Year 2019 for the 23 independently incorporated nonprofit organizations.
4. For further discussion and overviews of related literature see Francie Ostrower and Thad Calabrese, *Audience Building and Financial Health in the Nonprofit Performing Arts: Current Literature and Unanswered Questions* (Austin, TX: University of Texas, 2019), <https://wallacefoundation.org/sites/default/files/2023-08/Audience-Building-Financial-Health-Nonprofit-Performing-Arts.pdf> and Francie Ostrower, “Nonprofit Arts Organizations: Sustainability and Rationales for Support,” Chapter 19 in Walter W. Powell and Patricia Bromley, eds., *The Nonprofit Sector: A Research Handbook Third Edition* (Stanford, CA: Stanford University Press, 2020).
5. For an extended discussion of role of the continuous learning approach and use of data in the initiative, see: Francie Ostrower, *Data and Deliberation: How Some Arts Organizations are Using Data to Understand Their Audiences* (Austin, TX: University of Texas, 2020), https://wallacefoundation.org/sites/default/files/2023-08/Data-and-Deliberation_o.pdf The University of Texas research team was not involved in data collection and market research activities carried out by grantees as part of their Wallace Foundation grants.
6. The Pew Research Center defines “millennials” as those born between 1981 and 1996 and “Generation X” as those born between 1965 and 1980. Michael Dimock, *Defining generations: Where Millennials end and Generation Z begins*. January 17, 2019, <https://www.pewresearch.org/fact-tank/2019/01/17/where-millennials-end-and-generation-z-begins/>. Initiative participants used varying parameters that generally fell in or around this age range, though some set younger or older boundaries.
7. Francie Ostrower and Thad Calabrese, *Audience Building and Financial Health in the Nonprofit Performing Arts: Current Literature and Unanswered Questions* (Austin, TX: University of Texas, 2019), <https://wallacefoundation.org/sites/default/files/2023-08/Audience-Building-Financial-Health-Nonprofit-Performing-Arts.pdf>
8. Based on responses from 23 organizations during the final round of interviews. The question was asked of the organization’s BAS project manager or equivalent. Data excludes one organization that did not participate in the final interview round and one organization where remaining staff lacked the project background to answer this particular series. This 8.5 average excludes the “other” category, which was selected by 30 percent. “Other” answers often elaborated on activities already rated as major in another category. Sometimes respondents mentioned market research. We did not include market research on the list since it was used by everyone.
9. Preece found promising use of trailers by symphony orchestras because trailers permit direct communications and avoid the expense of scattered marketing efforts (see Stephen Bruce Preece, “Coming Soon to a Live Theater Near You: Performing Arts Trailers as Paratexts.” *International Journal of Nonprofit and Voluntary Sector Marketing* 16 (1): 23–35, 2011). Our findings suggest their promising use among other types of performing arts organizations.
10. In at least two of these cases, however, respondents were referring to a new venue that they were creating in their own existing venue.
11. See for instance, Christopher Walker and Kay Sherwood, *Participation in Arts and Culture: The Importance of Community Venues* (Washington, D.C.: The Urban Institute, 2003), <https://www.urban.org/sites/default/files/publication/58971/310795-Participation-in-Arts-and-Culture.PDF>; Brent Reidy, *Why “Where”? Because “Who”: Arts venues, spaces and tradition* (San Francisco, CA: The James Irvine Foundation and AEA Consulting, 2014), https://aeaconulting.com/uploads/200002/147567987678/WhyWhereBecauseWho_2014DEC3.pdf
12. For further discussion of BAS organizations’ rationales for, and experiences with, millennials as a target audience see Francie Ostrower, *Millennials Are Not a Monolith: Experiences from One Group of Performing Arts Organizations’ Audience-Building Efforts* (Austin, TX: University of Texas, 2021), https://wallacefoundation.org/sites/default/files/2023-08/Millennials-Are-Not-a-Monolith_o.pdf
13. Both weights adjust for differential probabilities of selection and response bias. The “booker weight” adjustment treats all respondents as counting equally in analyses, regardless of how often they attend. The “production weight” gives respondents different weights in the analysis depending on how many productions they attended (for further details, see the appendix).
14. $p=.051$ for Gen X vs. all others. The target *or younger* comparison is particularly appropriate for this organization because it had an atypically high percentage of millennial bookers. Therefore, while the target vs. others comparison generally meant a comparison to older audiences, in this case the non-target also included a substantial number of younger bookers.
15. Based on logistic regression analyses of pooled 2019 samples for all 15 organizations. Dummy variables were included for the organizations to control for potential organization-specific differences. Data are drawn from responses to the following survey question: “People attend performing arts events, such as a play, dance, or musical performance for different reasons. Is [] a reason that you attend performing arts events such as a play, dance, or musical performance?” Reasons were queried individually, with the order rotated on the online survey. Response choices were, “Yes, it is a reason” or “No, it is not a reason.” For regressions where “low cost or free admission” was the dependent variable: Parameter estimates were 1.41 (SE=0.10) for millennials or younger (combined due to the small number of younger than millennial respondents), and 0.37 (SE=0.08) for Gen X ($p<.001$ in both cases). Further, there was an interaction effect between race and Gen X membership (the estimate was 0.50, SE=0.18, $p<.01$), indicating that the Gen X effect

- was somewhat higher among respondents of color (n=10,424 cases). Likewise, millennial or younger and Gen X respondents were more likely to say that socializing with family or friends was a reason for attending. Parameter estimates were 0.93 (SE=.10) and 0.43 (SE=0.07) respectively with both $p < .001$. n=10,650 cases.
16. Data on race and ethnicity were gathered from two survey questions, one on Hispanic origin and the other on race (see appendix). Both of these organizations sought to diversify beyond their predominantly White audience. Membership in their target-audience group was accordingly coded as a dichotomous variable where: Respondents are coded as members of the target audience if they identified as one or more of the following (respondents could select as many categories as they wished): Hispanic/Latina/o or Spanish origin; Black or African American; American Indian or Alaska Native; Asian; Native Hawaiian; or Other Pacific Islander, or selected Other with a write-in that permitted a categorization to be made (write-ins here were typically variations of “mixed race” and/or the pre-offered categories). Respondents were coded as not in the target audience if they indicated they were not Hispanic and only selected the “White” category for their race. Respondents who identified as Other and wrote in answers that did not permit identification of race (e.g., “human”) were excluded from this analysis. In both years, over 97 percentage of respondents provided usable answers.
 17. Based on logistic regression analyses of pooled 2019 samples for all 15 organizations. Dummy variables were included for the organizations to control for potential organization-specific differences. Responses drawn from analyses of responses to the survey question about reasons for attending performing arts events (see above). For logistic regressions where “celebrating my cultural heritage” was the dependent variable: Parameter estimates were 1.43 (SE=0.08) for a dichotomous race variable where 1=not White ($p < .001$). Dummy variables for millennial or younger, and Gen X, were also included but were not significant (n=10,423 cases).
 18. See Francie Ostrower, *Millennials Are Not a Monolith: Experiences from One Group of Performing Arts Organizations’ Audience-Building Efforts* (Austin, TX: University of Texas, 2021), https://wallacefoundation.org/sites/default/files/2023-08/Millennials-Are-Not-a-Monolith_o.pdf.
 19. Based on logistic regressions where the dependent variable is whether the respondent attended a new work. For the dance company, the 2015 parameter estimate for age was 0.04 ($p < .01$) and number of productions attended that season 1.21 ($p < .001$). For 2019, parameter estimates are 0.01 for age ($p > .05$) and 1.60 for number of productions booked ($p < .001$). Parameter estimates for logistic regressions on the theater sample for 2015 are age -0.001 ($p > .05$) and number of productions booked 1.07 ($p < .001$). For 2019 they are -0.01 for age ($p > .05$) and 1.74 for number of productions attended ($p < .001$).
 20. $p < .001$ for the dance company and $< .05$ for the theater. In both cases, based on a crosstab of how many times the respondent attended a live performing arts event during 2019 (0, 1-3, 4-6, 7-12, 13-24, Over 24) by whether or not they attended a new work production.
 21. For one organization, subscribers were 38.1% of new works bookers compared with 6.3% of all main season bookers. At the other organization, subscribers were 46.2% of new works bookers compared with 25.7% of all main season bookers.
 22. Initially the organization anticipated that the age profile of the target-group age was between 20-34 years of age. The percentage of target-audience bookers from that age group did increase significantly between 2015 and 2019 ($p < .05$), reaching almost 24 percent in 2019. Still, that age group remained a minority of the target group, with no statistically significant association between membership in that age group and target-group membership.
 23. Once comp tickets are removed, the target-group average ticket price was \$48.75 vs. \$47.37 for non-target audience.
 24. We generally employ Chi-square tests, but here we use Fisher’s Exact test, an alternative statistical test used when table cells have expected counts under five (as was the case here).
 25. The variables included total revenue, net revenue, assets, and net assets. T-tests were computed and in no instance were significant. Appendix Table A1 shows the actual percentage changes between 2015 and 2019 on these variables.
 26. Kevin F. McCarthy and Kimberly Jinnett, *A New Framework for Building Participation in the Arts* (Santa Monica, CA: RAND Corporation, 2001), https://www.rand.org/content/dam/rand/pubs/monograph_reports/2005/MR1323.pdf.
 27. Jennifer Wiggins, “Motivation, Ability and Opportunity to Participate: A Reconceptualization of the RAND Model of Audience Development,” *International Journal of Arts Management*, 7(1): 22–33, 2004.
 28. “Appendix Table A1: Percent Changes in Main Season Attendance, Tickets, and Organizational Finances: 2015-2019 Seasons” includes full figures for changes in total attendance and organizational finances discussed in this section, of which Table 16 is an extract.
 29. The correlation was -.88 ($p < .001$) including all bookers and -.84 ($p < .001$) excluding comp-only bookers.
 30. The correlation between the percent change in season ticket revenue and in numbers of bookers (excluding comp-only bookers) was .78 ($p < .001$), and for all bookers was .70 ($p < .01$). The correlation between change in season ticket revenue and change in ticket sales excluding comps was .96 ($p < .001$). The corresponding correlation with all tickets issued (comp or paid) was .93 ($p < .001$).
 31. The percent changes on these variables are shown in Appendix Table A1.
 32. William J. Baumol and William G. Bowen, “On the Performing Arts: The Anatomy of Their Economic Problems,” *The American Economic Review*, 55(1/2): 495–502, 1965; William J. Baumol and William G. Bowen, *Performing Arts—The Economic Dilemma: A Study of Problems Common to Theater, Opera, Music, and Dance* (New York, NY: Twentieth Century Fund, 1966).
 33. William J. Baumol and William G. Bowen, “On the Performing Arts: The Anatomy of Their Economic Problems,” *The American Economic Review*, 55(1/2): 495–502, 1965; Baumol, William J. and William G. Bowen, *Performing Arts—The Economic Dilemma: A Study of Problems Common to Theater, Opera, Music, and Dance* (New York, NY: Twentieth Century Fund, 1966). As discussed, Baumol and Bowen argue that performing arts organizations must spend a considerable part of their budgets on labor costs, which increase over time, but lack ways to contain or reduce rising costs by increasing productivity. Studies have variously confirmed or denied the presence of a cost disease in the arts, and some question the inevitability of a widening gap between earned income and expenses and the impossibility of achieving productivity gains (see Francie Ostrower and Thad Calabrese, *Audience Building and Financial Health in the Nonprofit Performing Arts: Current Literature and Unanswered Questions* (Austin, TX: University

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of Texas, 2019), <https://wallacefoundation.org/sites/default/files/2023-08/Audience-Building-Financial-Health-Nonprofit-Performing-Arts.pdf>.

34. In such cases, we would also ask if there were any “other” items. As well, we asked more generally if there were questions interviewees thought we should have asked but hadn’t (which we would then discuss) and if they had anything else they wished to add.
35. Given the project’s emphasis on sustainability and the non-profit status of these organizations, we asked organizations why they believe it was important that they continue. Results are presented in Francie Ostrower, *Why Is It Important That We Continue? Some Nonprofit Arts Organizations Rethink Their Value in Challenging Times* (Austin, TX: University of Texas, 2021), <https://wallacefoundation.org/sites/default/files/2023-08/Why-Is-It-Important-That-We-Continue.pdf>
36. One organization declined to be interviewed in Round 3. Round 1 also included an additional organization (with eight additional interviews) that exited the initiative, and those data are therefore not included.
37. There were 25 organizations in the BAS initiative, of which 21 organizations had target-group definitions amenable to study via analyses of the databases and/or a common survey. The other four had target audiences that were so different (e.g., “adventurousness”) they would have required separate surveys. Among the 21 organizations with eligible target audiences, there were five that did not participate: One did not have the necessary ticket database data, and four declined to participate.
38. Data extracted from the CRMs were delivered to us in multiple Excel data files (ticket level files, booker level data files, production level data files, and performance level data files) for each organization and each time period. We imported these into separate SAS datasets for each organization, merging the different time periods for each of the file groups for each organization.
39. Failing to remove passes as unique productions within a season had the potential to inflate the count of productions and performances—especially at organizations that included multiple pass “productions” within a season for passes. However, the pass situation had minimal impact at the ticket level where no more than 2.4% of an organization’s Main Season tickets (at one season for one organization) were for Pass “productions.”
40. As noted, we contracted with Urban Institute to provide survey expertise, which included drawing the sample and post-survey weight construction. Discussions of sampling and weight construction in this section draw on documentation compiled by Urban Institute senior survey methodologist Timothy Triplett.
41. Organizations generally had a field with codes indicating whether a booker was an individual, household, or organization. However, we found additional cases that had not been coded as such but were organizations. Further we found that in some cases, large numbers of tickets were associated with a staff member or department at the organizations itself (e.g., its Development Department), and removed those cases from the sampling frame. We also excluded those with no contact information.
42. We sorted bookers according to the number of productions attended. In some cases, depending on the number of main season productions, and where the distribution dropped off, those attending a certain number of productions or more were combined. For instance, at one orchestra with many productions those attending eight or more were grouped together.
43. We identified close to 41,000 instances of individuals who appeared in more than one sample. The majority were in 2015 and 2019 samples for the same organization, but over 7,000 appeared in more than one organization. Once the samples had been combined, we identified an additional 2,333 problematic records (e.g., due to bad or fake addresses, such as nobody@nobody.com or 123 Fake Street, records with “deceased” in contact fields, and additional instances where large numbers of bookers were associated with the organization’s own email and address). They were removed from the list to be sent the survey but retained in the denominator for the calculation of our completion rate.
44. The response rate would be 9.4 percent (20,573/219,083).
45. For discussions of the substantial and widespread drop in survey response, see, for instance, Thomas J. Leeper, “Where Have the Respondents Gone? Perhaps We Ate Them All.” *Public Opinion Quarterly* 83: 280-288, 2019. See also “Response Rates – An Overview.” American Association for Public Opinion Research (AAPOR) <https://aapor.org/publications-resources/education-resources/response-rates/> (Retrieved November 8, 2023).
46. “Response Rates—An Overview.” American Association for Public Opinion Research (AAPOR) <https://aapor.org/publications-resources/education-resources/response-rates/> (Retrieved November 8, 2023).
47. If people declined to provide their exact age, we next asked if they would select from a set of close-ended age categories (e.g., 30-34, 45-49), which yielded additional responses. The categories were designed to accommodate the largest numbers of the different target-age definitions.
48. Michael Dimock, *Defining generations: Where Millennials end and Generation Z begins*. January 17, 2019, <https://www.pewresearch.org/short-reads/2019/01/17/where-millennials-end-and-generation-z-begins/>
49. Sometimes there were enough similar responses to the “Other please specify category” to later create a new category (e.g., write-ins that indicated Hispanic, Latinx, Latina/o). Some write-ins were for the categories that had been offered, and these were then back coded to those.



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