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Building Millennial Audiences: Barriers and Opportunities

The Wallace Foundation,
Building Audiences for Sustainability
January 2017

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Analysis Conducted By
Marketing Research Professionals, Inc.

Background

- In 2015, The Wallace Foundation began the Building Audiences for Sustainability initiative, a six-year effort to help selected arts organizations determine whether and how they could build audiences in ways that also contribute to their financial health.
- Many organizations participating in the initiative are targeting Millennials, people who are roughly 18 to 34 years old.
- To help inform their efforts, Wallace commissioned the following synthesis of information on Millennials from research conducted by the arts organizations, supplemented by outside sources.
- A version of this synthesis was presented to participating organizations in November 2016. We offer it publicly here so other arts organizations may benefit as well.

What You Should Know About This Analysis

- **Information was drawn from two types of sources** -- 1) research conducted by Wallace Foundation grant recipients, and 2) information from government and other publicly available secondary sources. The secondary info was used to provide additional perspective on the Millennial landscape.
- **The arts groups included in the Wallace initiative represent a variety of disciplines, sizes and geographies.** Annual operating budgets vary from about \$2 million to \$76 million. A list of the organizations and their research firms is in the Appendix.
- **Both qualitative and quantitative research** from the arts organizations were used in the analysis. Most of the fieldwork was completed in mid to late 2015.
- **People interviewed in the studies included a mix of current patrons, past patrons and/or prospects** for each organization. Prospects were screened to be inclined towards the types of performances offered by each group.

Limitations

- Most of the research used in this analysis was conducted for organizations participating in The Wallace Foundation initiative. These organizations may or may not be typical of other performing arts organizations.
- Each organization designed research to address its own specific needs. There were differences in how samples were defined, the topics covered and question wording. These differences limit the ability to make direct comparisons across the studies.
- While many studies focused on Millennials 18 to 34, others used slightly different age ranges or defined the youngest age group as up to age 40. Results from these studies have been included in the analysis.

Initiatives to Increase Millennial Attendance

- As part of the longer term Wallace Foundation initiative, many of the participating arts organizations have developed and are testing programs to increase attendance among young audiences. These programs are being examined separately.



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Topics Covered

- Executive Summary
- Millennial Landscape
- Barriers to Performing Arts Attendance
- How Millennials Get Info about Events
- Why Millennials Do Attend
- Communicating the Benefits of the Arts
- Appendix



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Building Millennial Audiences – Executive Summary

- Millennials are different from other generations in the financial challenges they face, their attitudes and values, how they live, and how they communicate and connect with others.
- Millennial attendance at arts performances has declined. There have been declines among older age groups as well, particularly those 35 to 49.
- Top barriers that keep Millennials from attending the performing arts are cost, not having people to go with, being busy with other things, and limited awareness and knowledge of the arts organizations.
 - Barriers are similar regardless of organization size, location or type of programming offered.
 - The cost issues often reflect deeper concerns about enjoyment, value and risk, i.e. spending money and not having a good time.
 - There is fierce competition for Millennial time. Competition includes other cultural events as well as all of the ways Millennials spend their free time.

(continued)

Building Millennial Audiences – Executive Summary

- Millennials who attend performing arts events provide insights that can be used to attract more of their peers.
- In addition to basic reasons for going, such as entertainment and an evening out, Millennials describe compelling emotional and spiritual benefits.

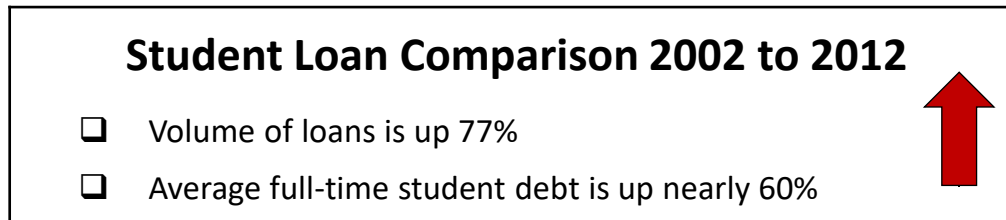
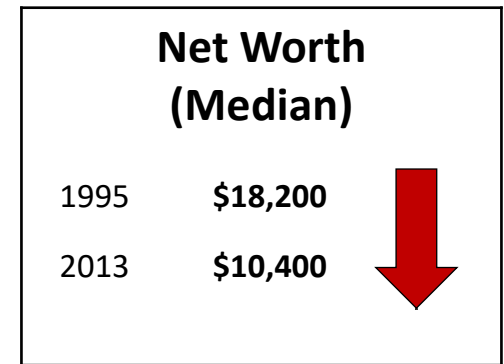
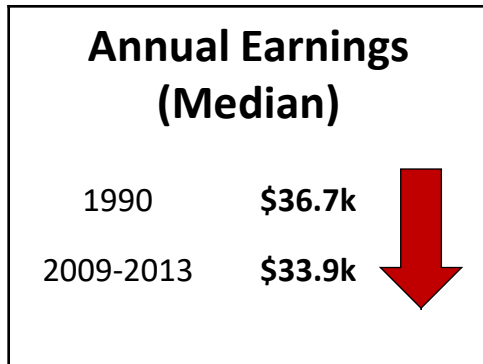
The performing arts help them:

- Feel transcendental – part of something bigger
 - Feel alive and present
 - “Forget” themselves and get away from day-to-day stress
 - Enhance their sense of self or self-identity
- There are opportunities to communicate these deeper benefits to encourage more Millennials to attend so they can discover the value and richness the arts can bring to their lives.
 - In addition, some arts performances are about topics that relate to the progressive social values held by many Millennials. Communicating these connections may be another way to attract young audiences.

Detailed Findings: Millennial Landscape

Millennials face more financial challenges than prior generations; many may never catch up, creating a permanently more difficult environment for arts organizations

Key Facts: Millennials vs. Prior Generations When They Were 18 to 34



Sources: Earnings and net worth: The New York Times based on data from U.S. Census Bureau and Federal Reserve Survey of Consumer Finances. \$ figures are based on medians for 18 to 34 year olds in 2013 dollars.

Student loan data are from Brookings Institute. For full detail on sources for all slides, please see Endnotes in Appendix.

Photo credit: wavebreakmedia/Shutterstock.com

Millennials are more ethnically diverse than other generations, and think about diversity differently

43% of Millennial adults are non-white, the highest share of any generation

Source: Pew Research Center



“Millennials’ definition of diversity is broad, viewing diversity as much more than race, gender and ethnicity and incorporating all the differences that exist within people from religion, language, geography, nationality, sexual orientation and interests.”

Source: American Advertising Federation Thought Leadership Panel

Millennials are also more liberal in their attitudes on social issues and less likely to self-identify as religious or patriotic



How Millennials Differ from Older Generations

	Millen -nials	Gen X	Boom -ers
Millennials are MORE likely to...			
Support same sex marriage	68%	55%	48%
Support path to citizenship for undocumented immigrants	55%	46%	39%
Millennials are LESS likely to...			
Describe self as patriotic	49%	64%	75%
Describe self as religious	36%	52%	55%

Source: Pew Research Center, 2014

Photo credit: Monkey Business Images/Shutterstock.com

Millennials are “on the move” and they are more likely to want a “car optional” lifestyle than older generations

73%

are likely to move in the next 5 years



There may be an opportunity for arts groups in popular or gentrifying neighborhoods to reach out to those who live nearby or visit

	Millen- nials	Gen X	Boomers
Prefer “car optional” place	63%	44%	49%
Live in city now	46%	36%	30%
Want to live in city in the future	37%	28%	22%

Source: Urban Land Institute, 2015; based on adults 18 to 36

Photo credit: Billion Photos/Shutterstock.com

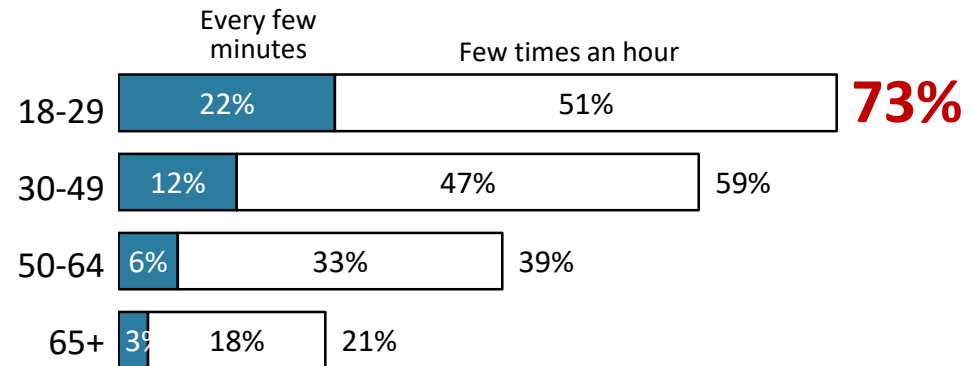
As everyone knows, Millennials are considered “digital natives”* – i.e. they grew up with the Internet and cellphones

Use Social Media Networking Sites

18-29	90%
30-49	77%
50-64	51%
65+	35%

Source: Pew Research Center, 2015

Check Phone



Source: Gallup.com, 2015



Smartphone Behavior

Smartphone never leaves my side, night or day **87%**

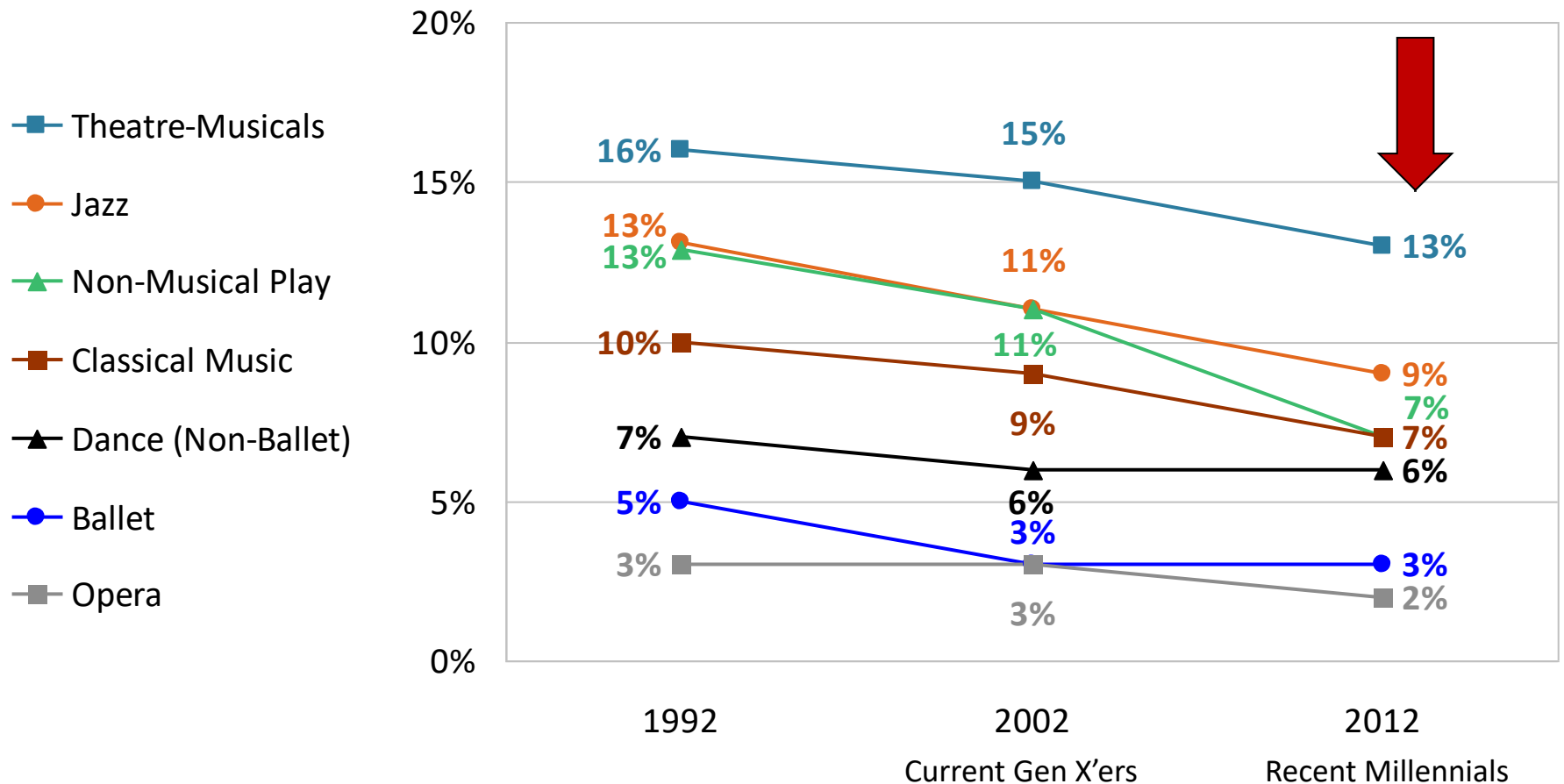
Among adults 18 to 34 who use smartphone
Source: Mary Meeker, kpcb.com, based on survey by Zogby Analytics, 2014

* “Digital natives” -- According to Wikipedia, this term was coined and popularized by education consultant Marc Prensky in his 2001 article entitled *Digital Natives, Digital Immigrants*

Photo credit: Toa55/Shutterstock.com

Fewer 18 to 34 year olds attend performing arts events than previous 18 to 34 year olds

Attended Performance in Past 12 Months
(Among Those 18 to 34 in Year Shown)



However, attendance has declined sharply among other age groups also. Declines among 35 to 49 year olds are even greater than 18 to 34 year olds for ballet, classical music and opera.

Change in Attendance* from 1992 to 2012
 (Among Those in Each Age Group in 2012 vs. 1992)

Change in Attendance Percentage change	18-34	35-49	50-70
Small increase (+ 0 to 14%)	(none)	(none)	Jazz
Small decline (- 0 to 14%)	(none)	(none)	Theatre/Musicals
Moderate decline (- 15 to 29%)	Theatre/Musicals Dance (Non-Ballet) Opera	Theatre/Musicals Dance (Non-Ballet)	Dance (Non-Ballet) Classical Music
Large decline (- 30% to 44%)	Classical Music Jazz Non-Musical Play Ballet	Jazz Non-Musical Play	Non-Musical Play Ballet Opera
Huge decline (-45% or more)		Ballet Classical Music Opera	

* Attended in past 12 months

Source: National Archive of Data on Arts and Culture; based on those who were age shown in 1992 and in 2012

Barriers to Performing Arts Attendance

Top barriers to attendance among “prospects” of arts groups are cost, no one to go with and being busy with other things

Regardless of where they are, how big they are and what they offer, arts groups face similar barriers

Top Barriers

Cost – tickets and evening out
No one to go with
Busy with other things
Not familiar with or aware of arts organization
Doesn't fit schedule
Don't like type of performance or programs
Too far away/hard to get to

Other Barriers

Limited knowledge about type of performance
Prefer other entertainment types
Not comfortable at location
Have to plan in advance/hassle
Not sure or don't think will enjoy
People my age don't go/not for people like me

Note:

Prospects were screened to be “inclined.” Criteria varied across organizations. Some required actual attendance at similar events; others accepted interest in attending events or simply interest in the category to define those who were inclined.

Top barriers are those that surfaced across more organizations and/or which were seen as the more important barriers

Source: Grant recipient quantitative and qualitative research

Top barriers for current and lapsed patrons are similar to the barriers for prospects

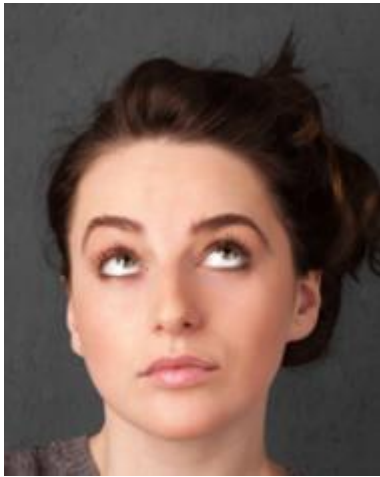
Barriers to Attendance: How Patrons/Past Patrons Compare with Prospects*

- Cost is still the biggest barrier. Patrons/past patrons go into more detail about...
 - Cost of tickets
 - Not being able to afford good seats
 - Cost of whole evening out
 - Having less disposable income than used to
 - Having aged out of discounts
- No one to go with is a key reason for patrons and prospects
- Busy with other things is a key reason for both; patrons/past patrons are more likely to note that their lifestyle has changed

* There was less quantitative data on barriers among patrons than prospects
Source: Grant recipient quantitative and qualitative research

Barrier Deep Dive: Cost, Affordability, Value and Risk

Cost concerns – the biggest barrier – encompass a number of specific issues. Decisions on whether to spend the money are linked to broader considerations about enjoyment, value and risk.



“Should I go?”

Stated Cost Issues

Cost of evening out

Cost of tickets

Cost vs. other entertainment options

Can't afford good seats

Can't afford to go at all

Aged out of discounts

Broad Underlying Considerations

Perceptions of value, risk and trade-offs
vs. other entertainment options

Other financial priorities and pressures

“Risk” is key. Many assess it carefully.

Millennials are willing to spend more freely for rock concerts or other special events they know they’ll enjoy.

They will not spend as much for an event they’re not sure about.

“It’s not about the cost or whether I have the money, but just about the investment and the risk.”



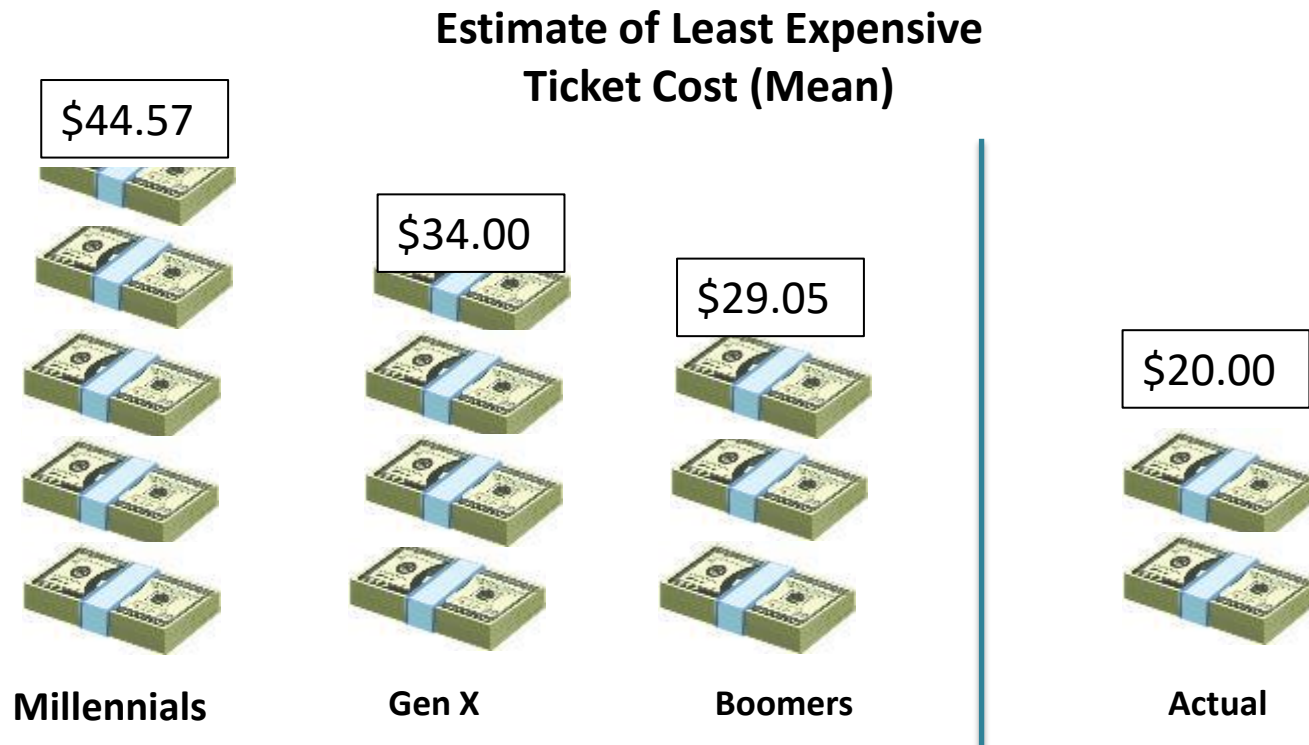
“I can see myself paying \$100 for a show I’ve wanted to see for a long time, but not more than \$50-60 for a normal show, and really more like \$20 to 30 if I can.”

“Will it be worth the money? It’s one thing to pay \$50 for a concert of a band you know you or your friends enjoy; it’s quite another to pay \$50 for something you are unsure about.”

Prospects for several organizations thought tickets cost more than they do. Communicating prices may help.

In one example, Millennials' estimates of ticket prices were:

- Higher than Gen X and Boomer estimates
- More than 2X higher than actual prices



**Barrier Deep Dive:
Socializing and Having
Someone to Go With**

“No one to go with” is a key barrier across organizations regardless of discipline or size

It is particularly hard to find someone to go to performances of classical music, opera and dance



*“Classical music does not feed their driving need to socialize. Many respondents couldn’t imagine how to get their friends to go with them.” * (Orchestra)*

*“Many thought it would be difficult to find a companion willing to invest time and effort in attending opera.” * (Opera)*

* These quotes are summary comments from qualitative research reports

For some events, Millennials want to attend with a whole group of friends (not just one)



“Being able to socialize with friends is an important part of the performing arts experience”

– agreed to by 55% of prospects for Presenter/Producer organization

Barrier Deep Dive: Too Busy to Go and What Competes

Arts groups compete with a variety of different types of performing arts offerings



Performing Arts

Live Music/Rock Concert

Comedy/Improv

Theatre - Musical

Non-Musical Play

Symphony

Outdoor Festival

Lecture/Panel

Dance

Book Reading

Opera



And the performing arts compete with a wide assortment of other pursuits; going to restaurants is especially popular. There is strong competition for Millennial time and spending.



Other Entertainment and Leisure Time Activities

<i>Restaurants/Bars*</i>	<i>Sporting Events</i>
<i>Movies</i>	<i>Doing Sports</i>
<i>TV/Netflix, etc.</i>	<i>Outdoor Activities</i>
<i>Social Networking</i>	<i>Hobbies (Painting, Crafts)</i>
<i>Hanging Out with Friends</i>	<i>Gardening</i>
<i>Museums/Galleries</i>	<i>Taking classes</i>
<i>Art Fairs/Street Art</i>	<i>Clubs (Books, Wine, etc.)</i>
<i>Reading</i>	<i>Playing Music</i>
<i>Cooking</i>	<i>Playing Games</i>
<i>Spending Time with Family</i>	<i>Dancing</i>
<i>Pets</i>	<i>Volunteering</i>
<i>Parties</i>	<i>Religious Activities</i>
<i>Listening to Music</i>	<i>Travel</i>
<i>Working Out</i>	<i>Local Sightseeing (Monuments)</i>

* Restaurants topped list of events attended or preferred (based on 2 quantitative studies)

Source: Grant recipient quantitative and qualitative research

Photo credit: ESB Professional/Shutterstock.com

Digital entertainment options have mushroomed in the last decade; many new options are curated to individual tastes



Evolution of Content Discovery, 1975 – 2015, per Nielsen

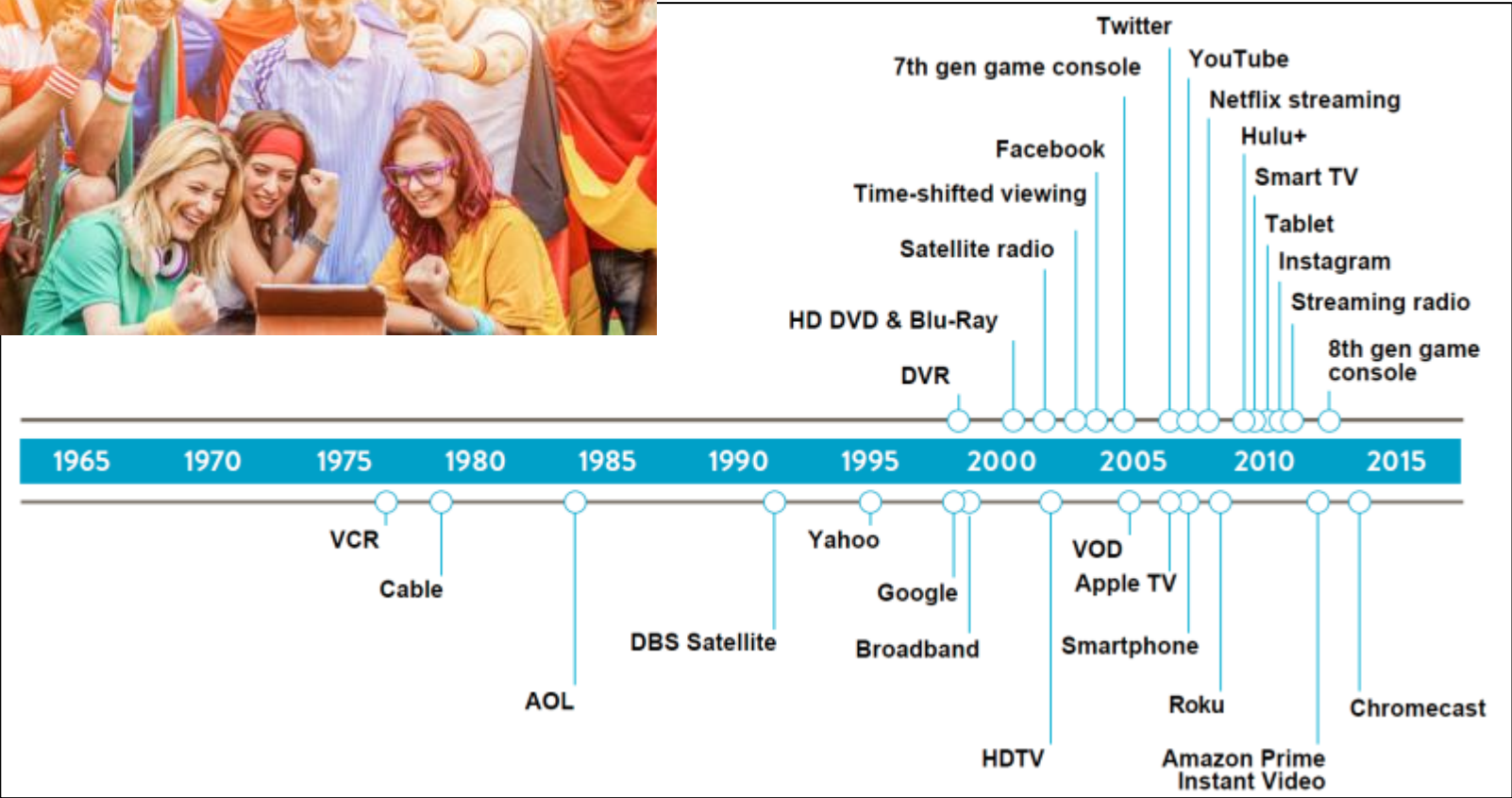


Chart Source: Mary Meeker, kpcb.com
 Photo credit: DisobeyArt/Shutterstock.com

Barrier Deep Dive: Vibe, Buzz and Fit

- Vibe: What the atmosphere of a place feels like
- Buzz: A feeling of excitement and fun
- Buzz-worthy: Likely to arouse interest
- Fit: Whether an event feels right for someone like me

While lack of cool vibe, buzz-worthiness and fit are not top barriers, they do keep some “inclined” Millennials from attending orchestra, ballet and opera performances



- Millennials like events that are **complete experiences** with opportunities to socialize. Serving drinks and food and being in the “right” space sets the stage for a good time.
- **Buzz-worthy** events let Millennials leverage the experience both on and off-line which enhances value perceptions
- **Being surrounded with others like themselves** makes going fun; being surrounded by older patrons does not
- While many Millennials love dressing up and enjoy the pageantry of the symphony, ballet and opera, a large portion want events with **no formality and no “dress code”**

Sources: Grant recipient quantitative and qualitative research, and Eventbrite Survey, 2015 (among people who attended performing or visual arts events in past 12 months)

Photo credit: Monkey Business Images/Shutterstock.com

It's not just about the performance. Wanting a whole “experience” is a theme that came up across organizations, geographies and disciplines.

**Food, Drinks and
Place to Socialize**



**Events that are Unique
or Different**
i.e. Access to Performers



Special Venue



Sources: Grant recipient quantitative and qualitative research, and Eventbrite Survey, 2015 (among people who attended performing or visual arts events in past 12 months)

Photo credits: People with drinks: bikeriderlondon/Shutterstock.com; Musicians on farm: alexandre zveiger/Shutterstock.com

Some Millennials prefer events that are **buzz-worthy** or that communicate something about themselves to their followers



Millennials want to be able to talk about what they've experienced on social media and in live conversations

"There's not a lot of bragging rights associated with going to the opera or ballet. You don't roll in on Monday morning and be like, 'Yo, you should have been at this ballet.'"

"I have tweeted about attending (organization's performance) ... I shared because I had a good time and wanted others to know how impressed I wasAlso, I wanted to seem cool and cultured to my [Twitter] followers..."

"Post your selfie on Instagram and then make all your friends jealous. Feel sophisticated! There is a lot of that.....There is a sense of ... 'I'm awesome, I know.'"

Many Millennials love the vibe and feel happy at orchestra, opera and ballet performances. Others grumble about the audience and ambiance.



There is a lot of input about old(er), “uncool” audiences.

“I would say old, classy, old fashioned, stuffy, pretentious.” (Description of audience from Orchestra research)



**Attributes of the Symphony
(from Qualitative Research)**

Restraint—feeling trapped

A place where you can't be yourself

Exclusivity, and a sense of being out of place

Older people

Note: There were also images and descriptions that were positive and complimentary.

Source: Grant recipient qualitative research

Photos shown here were not the ones used in research by grant recipients. They were selected to represent the ideas expressed.

Photo credits: Couple: CREATISTA/Shutterstock.com; Woman: Marcel Jancovic/Shutterstock.com

While some complain about the formality of events, including dress, just as many seem to welcome the opportunity to dress up



There are far more comments about dress (regardless of preference for dressy or not) for orchestra, opera and ballet organizations than for theatres or mixed venues



*“I think the main thing that gets in the way is the dress code...I have no idea what I am going to wear. I don't even know how people dress for it...I would **just love to be comfortable.**” (Orchestra)*

*(To create ideal symphony experience)
“A dress-down performance (e.g., **pajama night**)”*

*“A large part of what makes the event special is the overall atmosphere, from the aesthetic of the space to ...the **pageantry of dressing up** and people-watching.” (Dance)*

*“Attending events like this make me **feel very sophisticated and proper** ...You feel like you're an upper class socialite.” (Orchestra)*

Additional Barriers to Attendance

The prior barriers were selected for “deep dives” because:

- 1) We needed to understand them better
- 2) Further analysis would provide input that would be useful across the different types of organizations

The following barriers – while important -- are not covered in detail for the reasons shown.

Barriers are easy to understand (Do not require a deep dive)

- Not familiar with or aware of arts organization
- Doesn't fit schedule
- Have to plan in advance/hassle
- Too far/hard to get to/not comfortable at location

Details for barrier are highly specific for each organization

- Don't like type of performance or programs/not enjoyed in past
- Limited knowledge about type of performance

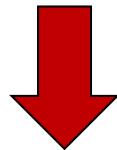
How Millennials Get Information About Events

For Wallace Foundation grant recipients, word of mouth and digital channels are the main sources of info about events

Leading Sources of Information About Events Among Millennials

- Word of mouth from family or friends
- Social media (particularly Facebook and Instagram)
- Emails from arts organizations
- Art organization websites
- Art organization brochures and mailings

Traditional Media



TV, radio, newspapers, magazines –
rank in the middle or near the bottom

For Some Organizations....

Patrons are more likely to use info sent out by the arts group itself

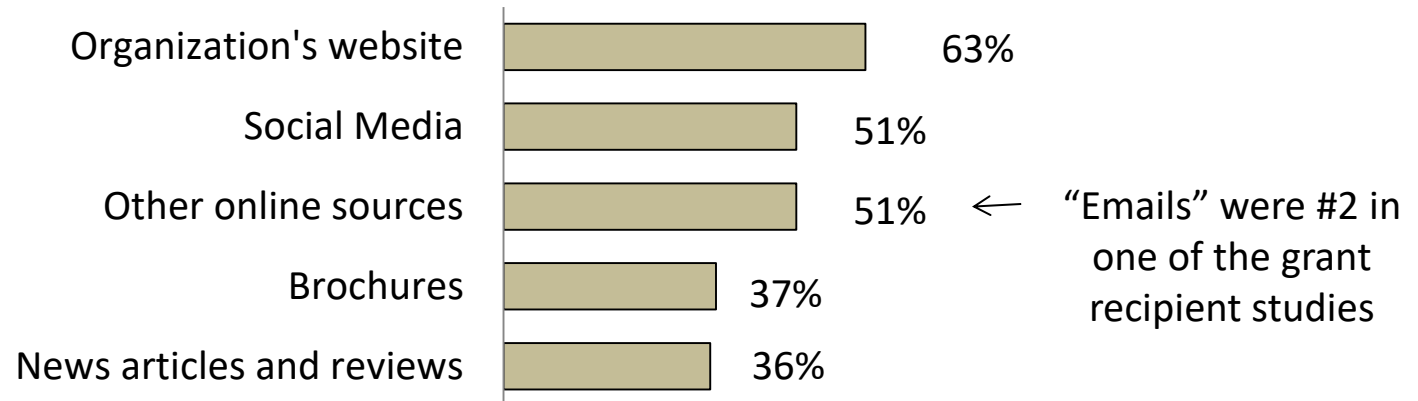
Prospects rely more on external sources

Millennials like to prepare before they attend a cultural activity.*
Engagement and education prior to performance can help
increase “value” and lower “risk.”

Average Number of Sources Used to Prepare for Visit

Millennials	3.1
Gen X'ers	2.8
Boomers	2.7

Top Sources of Information Used to Prepare (Among Millennials)



* Definition of cultural activities was not limited to the performing arts
Source for Top Sources: LaPlaca Cohen Culture Track Survey, 2014. Millennials were defined as 18 to 29. Definition of cultural activities was not limited to the performing arts. Average number of sources was calculated using LaPlaca Cohen data.

Why Millennials Attend the Performing Arts

When Millennials do attend performing arts events, the benefits go way beyond simple entertainment

- Millennials who go often talk about how the arts **make them feel**.
- Their descriptions reflect their desires for personal growth, to feel emotion, to de-stress, and to be deeply engaged in something beyond their day-to-day lives.
- There are also parallels between the storylines of some arts offerings and values/attitudes that a majority of Millennials hold.
- There are opportunities to better communicate the deeper emotional and transformative benefits of the arts to attract more Millennials, and to reinforce what they've experienced so they come back for more.

Millennials who attend performing arts events have many reasons for going; some of the reasons reflect their desires for personal growth and to go beyond their usual experiences

Key Reasons Why Millennials Attend (By Discipline)

Reasons for Going*	Ballet/ Dance	Orchestra	Theatre	Opera	Presenter /Producer
Feel transcendental, part of something bigger	✓	✓	✓	✓	
Night out, dressing up	✓	✓	✓	✓	
Beauty of sets, performance, venue	✓	✓	✓	✓	
Adventure, new experiences, out of comfort zone	✓	✓	✓		✓
Sense of community/connection/my community	✓	✓	✓		✓
Connect with friends and family	✓	✓	✓		✓
Feel present, de-stress, forget yourself	✓	✓		✓	✓
Opens mind, enriching, educational	✓	✓	✓		
Feel cultured, important, sophisticated	✓	✓	✓		
Feel alive, energized, ignited	✓	✓	✓		
Emotional, feels personal	✓	✓	✓		
Live performance, authentic, unique	✓	✓	✓		
Entertaining	✓		✓		✓

Source: Grant recipient research – mostly qualitative with some quantitative. This topic was covered in more studies for ballet, dance, orchestra and theatre than for opera or presenter/producer organizations. * Items shown were mentioned for at least three disciplines.

A large syndicated study found similar reasons to make the arts part of Millennials' lives and also highlighted two other benefits

**Escape everyday
stress and
rejuvenate**



**Enhance sense of
self or identity**

Communicating the Benefits of the Arts

The benefits of attending arts events can be connected to broader desires in Millennials' lives and can be communicated to attract more Millennials

Millennial Aspirations	Benefits of Attending Performing Arts
<p>Stretch self Feel alive</p>	<ul style="list-style-type: none"> ■ Transcendental experience – journey to “somewhere bigger” ■ Challenges you to think about new things and push you out of “comfort zone”
<p>Enhance sense of identity</p>	<ul style="list-style-type: none"> ■ Encourages self-discovery and reflection ■ Lets you see how others worked through conflicts and identity issues
<p>Relief from stress Desire to be “in the moment”</p>	<ul style="list-style-type: none"> ■ Performing arts are engaging and demanding in a way that’s different from movies, TV or digital entertainment ■ Helps you feel present and forget yourself
<p>Feel emotional connection and authenticity</p>	<ul style="list-style-type: none"> ■ Connect with the emotional openness and vulnerability of artists

(Continued)

Performing arts events also provide special experiences, opportunities to connect with others, and a link to progressive values many Millennials hold

Millennial Aspirations & Attitudes	Benefits of Attending Performing Arts
Have a full “experience”	<ul style="list-style-type: none">▪ Each live performance is a unique experience and can be an adventure
Connect with others; meet people and be part of a broader community	<ul style="list-style-type: none">▪ Connect with family and friends in a different way▪ Certain types of performances offer opportunity to be part of a community (i.e. live music or community events) or to take part in activities that bring people with similar interests together
Progressiveness on social issues*	<ul style="list-style-type: none">▪ Performances often focus on topics that reflect Millennials’ passion for social issues (diversity, gay marriage, immigration)▪ Also performers themselves may be a diverse group and some organizations/events provide opportunity to be part of a diverse audience or community that’s different from usual friends and associates

* While a majority of Millennials have progressive views, a sizable minority do not. The above suggestions are dependent on content of arts offerings and “fit” for any particular arts group.

Sources: Grant recipient research, secondary and syndicated research

Appendix

Arts Organizations and Research Firms

Arts Organizations

Alvin Ailey American Dance Theater
ASU Gammage
Ballet Austin
Baltimore Symphony Orchestra
Cal Performances
Contemporary Arts Center
Denver Center for the Performing Arts
Goodman Theatre
La Jolla Playhouse
Lyric Opera of Chicago
New York Philharmonic
Oakland East Bay Symphony
Opera Philadelphia
Opera Theatre of Saint Louis
Pacific Northwest Ballet
Pasadena Playhouse
Portland Center Stage
San Francisco Performances
Seattle Opera
Seattle Symphony Orchestra
Steppenwolf Theatre Company
University Musical Society
Victory Gardens Theater
Woolly Mammoth Theatre Company
World Music/CRASHarts

Research Partners*

Alexander Babbage
Colloquial Insights
Crux Research, Inc.
Karen Randolph
Kelton Communications & Media Practice
Kudzu Research & Insights
Lucid
MarketFitz
Market Street Research
Martin & Stowe
mind the gap
Phoenix Marketing International
Plannerzone Collective
Prescott & Associates
Research Explorers
Slover Linett Audience Research
WolfBrown

* Some research firms worked for more than one arts organization and/or conducted both qualitative and quantitative research

Endnotes: Secondary Sources

Slide	Credits
9	Earnings and net worth data: Steven Rattner, “We’re Making Life Too Hard for Millennials,” <i>The New York Times</i> , July 31, 2015. Sources referred to in article: Earnings data – census.gov/censusexplorer, U.S. Census Bureau; sociaexplorer.com; Minnesota Population Center. Net worth data: Federal Reserve Survey of Consumer Finances.
9	Student loan info: Michael Greenstone and Adam Looney, <i>Rising Student Debt Burdens: Factors Behind the Phenomenon</i> , The Hamilton Project, July 5, 2013, https://www.brookings.edu/blog/jobs/2013/07/05/rising-student-debt-burdens-factors-behind-the-phenomenon (accessed 4/26/16)
10	Percentage non-white: Pew Research Center, <i>Millennials in Adulthood: Detached from Institutions, Networked with Friends</i> , March 2014
10	Quote on diversity: American Advertising Federation Thought Leadership Panel, <i>A Millennial Perspective on Diversity and Multiculturalism</i> , 2011 – 2012; based on students and professionals in 5 cities, all of whom were affiliated with AAF
11	Pew Research Center, <i>Millennials in Adulthood: Detached from Institutions, Networked with Friends</i> , March 2014
12	Urban Land Institute, <i>America in 2015: A ULI Survey of Views on Housing, Transportation, and Community</i> , 2015
13	Social media sites: Andrew Perrin, <i>Social Media Usage: 2005 – 2015</i> , Pew Research Center, October 2015
13	Phone checking: Frank Newport, “Most U.S. Smartphone Owners Check Phone at Least Hourly,” Gallup.com, 2015, http://www.gallup.com/topic/economy (accessed 5/10/16)
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(continued)

Endnotes: Secondary Sources

Slide	Credits
14 ,15	Data were pulled from National Archive of Data on Arts and Culture, https://www.icpsr.umich.edu/rpxlogin . They are from the Survey of Public Participation in the Arts 1982-2012 Combined File (United States). Data were accessed in April 2016 and December 2016.
29	Mary Meeker, <i>Internet Trends 2015 – Code Conference</i> , kpcb.com, kpcb.com/InternetTrends (accessed 5/10/16). Source of chart shown is Nielsen, 12/14.
31, 32	Eventbrite, <i>The Art of Attraction: How to Grow your Millennial Arts Audience</i> , based on survey by Kelton, March 2015 (in addition to Wallace Foundation grant recipient quantitative and qualitative research)
39	LaPlaca Cohen, <i>Culture Track '14 Supporting Data</i> , research conducted by Campbell Rinker, 2014
43	LaPlaca Cohen, <i>Culture Track '14 Supporting Data</i> , research conducted by Campbell Rinker, 2014

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