In Search of the Magic Bullet: Results from the Building Audiences for Sustainability Initiative
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In Search of the Magic Bullet: Selected Findings*

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Introduction

• The Wallace Foundation’s *Building Audiences for Sustainability* (BAS) initiative awarded grants to 25 performing arts organizations to explore ways to engage new audiences while retaining existing ones, and to see whether these efforts contributed to organizations’ financial health.

• The Foundation then awarded a grant to The University of Texas at Austin to independently study project implementation and outcomes.

• Neither the initiative nor study offer surefire solutions. But they offer many insights about effective audience-building approaches – and equally important, about approaches that were not effective.
Focus of Today’s Talk

• Multiple findings, analyses, and case examples in report

• Focus of comments today is some major crosscutting findings
Overarching Message of Findings

Organizations may expand audiences, but not necessarily on the organization’s original terms. If organizations want to change how audiences engage with them, then organizations need to be open to changing themselves.
Findings and Implications

• Unexamined and unfounded assumptions often hindered organizations’ ability to connect with intended audiences.

• The implication: These assumptions exist and need to be examined and addressed. Otherwise, organizations risk talking past, instead of with, those they want to reach.

• Engaging with data and external feedback can help.
Findings and Implications

- Productive audience-building strategies met audiences where they were

- Thus, organizations may need to assess whether their communications are reaching and resonating with intended audiences

- Engaging with data and external feedback can help
Findings and Implications

- Organizations consistently found crossover strategies unsuccessful. Some organizations kept the programming and changed their criteria for success.

- An implication: Organizations should assess beforehand whether their goal is to expand audiences, even if it involves changing or expanding programming, or building audiences strictly for what they already do. They can do either or both but shouldn’t conflate the two.
Findings and Implications

• Most outcomes study organizations expanded their target audiences, but usually audience gains were more modest than initially hoped.

• Even dramatic gains generally did not enlarge total audience because organizations mostly focused on audience that were a small percent of their audience to begin with. Therefore, organizations should consider beforehand if their goal is increasing engagement by a particular audience or expanding audience overall.
Findings and Implications

- Target audience change was not associated with change in total ticket revenue, total revenue, or assets.

- Some target audiences were financially disadvantageous because they attended less and/or spent less on tickets. Thus, organizations should recognize some audience-building efforts serve other goals and may require subsidy. For those efforts, it’s important to have resources in place to protect the organization’s financial health.
Changes in Total Audience: 2015-2019

- Many outcomes study organizations expanded total audience, but audience gains were coupled with declining frequency of attendance.

- If this pattern holds more widely, implications would be profound: Organizations would need to either attract many more audience members just to fill the same number of seats previously filled with a smaller number of repeat ticket-buyers; find ways to attract deeper engagement; or some combination of the two.
**Infrequent Attendees: Implications and Assumptions**

- Audience-building strategies often assumed that once attracted, target audience members would progress along what one interviewee called the “long slow escalator” to frequent attendees and donors.

- Qualitative and quantitative study findings suggest many audience members may not be headed in that direction. If not, incorporating this group for who they are, is an important consideration for audience-building strategies today.
Concluding Questions

• If organizations want to change how audiences engage with them, organizations need to be open to changing themselves. If that is true, a key question is how much are organizations ready to change?

• Organizations saw philanthropy as equally, if not more, important to future sustainability. If that is true, then a key question is whether that philanthropy will be there to sustain them?
Q: How do we grow the audience for new, unfamiliar dance works... not driven by a traditional narrative or “plot?”
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THE HYPOTHESIS: IT’S A FAMILIARITY CONTINUUM

#1
Narrative work
(very familiar)

#2
Narrative work
(w/ some familiarity)

#3
Non-narrative work
(w/ some familiarity)

#4
Non-narrative work
(no familiar component)
THE UNCERTAINTY GAP
FOUR CONNECTIONS

Emotional

Social

Intellectual

Kinesthetic
THE FRAMEWORK: Pre-Show Experiences

The world premiere of Stephen Mills' ballet “Poe: A Tale of Madness” was a smash hit! Graham Reynolds’s amazing score was performed beautifully by Peter Bay and The Austin Symphony Orchestra; the exquisite costumes and staging were a delight for the eyes; and of course with the immensely talented and mesmerizing Ballet Austin dancers, they all blended into an Austin masterpiece.
• Founded in 1925
• Innovator in regional theater
• Values based arts and community organization: Quality, Equity, Community
Wallace BAS Goal

- Goodman Theatre’s premise focused on building audiences for “new work”
- Every season Goodman Theatre commits to presenting new work on our stages
Key Learnings

• It’s not “new”—it’s familiar vs. unfamiliar
• Importance of providing context for audiences
• Impact of price and discounts
• Comprehensive digital strategy
• Events and their role in attracting audiences
Impact Today

• Maintaining staff—and learnings
• Current state of audiences
• Challenge of relying on single tickets
• Increased confidence in selling new/unfamiliar work
Dr. Mieko Hatano
Executive Director

Kedrick Armstrong
Music Director
Pre-Pandemic

Target Demographic: born between 1965-1984; Gen X; older Millennials; and a more diverse population

Tactics: New series of concerts - Playlist and other socially relevant concert programs/themes.

❖ >25% of total Playlist audience in the target demographic
❖ 45% of new ticket buyers to Playlist in the target demographic
❖ Playlist attendance of 2,200+
❖ Increase subscribers by 10% in the target demographic
❖ Average of 20% of ticket buying households in the target demographic for additional two concerts
Asian and Latinx households are underrepresented among Oakland Symphony buyers as compared to the market.

<table>
<thead>
<tr>
<th>Purchasing Type (Households)</th>
<th>Ethnicity of Primary Decision Maker</th>
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<tbody>
<tr>
<td></td>
<td>European</td>
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<tr>
<td><strong>Subscribers</strong></td>
<td>Total (938)</td>
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<td></td>
<td>82.0%</td>
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<tr>
<td><strong>Single Ticket Buyers</strong></td>
<td>Total (5,624)</td>
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<td></td>
<td>72.5%</td>
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<td>Ticketed Events* (4,100)</td>
<td>70.6%</td>
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<tr>
<td>Break Bread Together (1,878)</td>
<td>78.0%</td>
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<tr>
<td>Summer Sing-In (286)</td>
<td>75.0%</td>
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<tr>
<td><strong>Total Buyers (5,931)</strong></td>
<td>73.1%</td>
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<tr>
<td>San Francisco-Oakland-Hayward (1,627,360)</td>
<td>52.7%</td>
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Playlist
Through the Years

2018
W. Kamau Bell

2019
Dolores Huerta

2022
Debbie Allen

2023
Angela Y. Davis
Audience Building is Community Building

11% of annual audience are Hall Pass ticket holders

Post-Pandemic

Jan 2023

May 2023

Nov 2023

Feb 2024
OTSL’s goal for the Building Audiences for Sustainability initiative:

- To build an audience that reflects the true diversity of the St. Louis community -- representing an array of ages, ethnicities, economic backgrounds, and viewpoints.
- Specifically, OTSL was focused on Millennial and Gen X audiences with a special emphasis on culturally diverse segments. This target was selected as a logical progression from the company’s recent growth among audiences from those demographic segments.
OTSL’s learning cycles included:

- **Expanding capacity** for existing programs that attract the target audience

- Creating activities in venues across the community to engage the target audience, with a goal of **converting off-season attendees** to festival season ticket buyers

- Launching a brand campaign to **raise awareness** within the target audience

- Experimenting with in-season activities to **increase retention** of new-to-file audiences from year one to year two
What did OTSL learn?

- A **commitment to diversity** on stage, in our storytelling, and in creative teams is the most effective way to attract the target audience.

- Connecting with the target audience through **experience-based activities** is more effective than disseminating information through marketing campaigns.

- **Community partnerships** are integral in reaching this target audience.

- While we saw some success with many of these tactics, we have **yet to achieve growth that balances the decline** of the subscriber base.
How are BAS learnings guiding OTSL’s work today?

- Centering diversity and inclusion in decision-making through initiatives like:
  - **New Works Collective**, which invites new decision-makers and new creators into opera.
  - **Artist-led programming** for concerts and events
  - **Intentionality** in assembling creative teams and casting
- Creating engagement opportunities throughout the year that reflect OTSL’s festival season experience
- **Investing in data** collection to drive decision-making, and adding capacity to ensure learnings are actionable
Thank you!

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ExperienceOpera.org
Thank you for joining us!

For more information
www.wallacefoundation.org