



# *Developing Next Generation Arts Audiences*



*Developed for*



*Prepared by*





## Executive Summary

Indianapolis' arts organizations are grappling with the challenge of developing younger audiences. This is a national phenomenon. Why is it happening, and what can the Indianapolis arts community do to develop next-generation patrons?

### DEFINITION:

#### Young Patrons

For the purpose of this report, a patron under the age of 40.

### DEFINITION:

#### Low Impact Users:

attend 0–4 arts events per year

#### Mid Impact Users:

attend 5–9 arts events per year

#### High Impact Users:

attend 10 or more arts events per year

The Arts Council of Indianapolis and Next Generation Consulting (NGC) collaborated on a dynamic project to:

- Discover the best programming, formatting, and marketing to attract and engage patrons aged 40 and under to the arts;
- Introduce local arts professionals to younger patrons and programming by involving them in the field research component of the project.

To meet these objectives, NGC:

- Studied the trends impacting audience development in Indianapolis and nation-wide;
- Conducted focus groups of under-40 year-old “high impact users” (see definition at left) about their attendance preferences;
- Trained a team of 24 local arts professionals to conduct in-depth interviews with 85 diverse, under-40 year-olds about their arts attendance behaviors; and
- Developed recommendations for the programming, formatting, and marketing needed to successfully attract and retain younger audiences.

This project was sponsored by the Lilly Endowment.

### Seven User Profiles

Next Generation Consulting conducted a web survey that asked 719 participants about their participation in arts and culture events. Those surveys, coupled with 85 in-depth interviews conducted by local teams of arts professionals aided the creation of these seven user profiles:

- All 20–40 year-olds
- Non-white 20–40 year-olds
- Single 20–40 year-olds
- 20–40 year-olds with children
- Students
- Low Impact users (20–40 year-olds)
- Medium-to-High Impact users (20–40 year-olds)

These profiles—along with their user and patronage statistics—will assist arts organizations in their marketing, segmentation, and development.



## Key Findings & Recommendations

- Young patrons attend arts and cultural events for reasons beyond the art itself. Specifically, young patrons want experiences that foster learning, connecting, and sensing. Organizations, including the Children’s Museum, Red {an orchestra}, and others are profiled within the report to offer detailed examples of how to design programming that meets the demands of the next generation.
- Young patrons do not demand free events. The average price paid to attend arts events is \$22.19. The highest price ever paid averaged \$79.01. Designing events at this price point is another way to engage younger audiences.
- Email newsletters are among the best and cheapest ways to reach young patrons. Because some arts organizations do not offer free email notifications and/or only offer it to members, we offer specific examples on how to position and execute email and track email subscribers.
- Young patrons spend most of their free time online. Thus, we have made specific recommendations for how arts organizations can better position and promote their website to a tech-savvy generation.
- Arts organizations must develop their capacity to measure and track audience development. Although this was not a core inquiry of the research, it became evident that many arts organizations lack appropriate tools and experience to determine their effectiveness in developing audiences. Many organizations, for example, have no idea what their average patron age is. They may not know how far their patrons drive to see performances, or how many of them respond to online promotions. Capacity-building in this area is recommended.

There are many things that arts organizations can do to attract younger audiences. This report details a strong sampling of them. As an arts community, there are also numerous ways to build richer collaborations that will appeal to young patrons—all that’s required is a willingness to see arts and culture as the next generation does. This report is written with that lens.



## *Engaging the Next Generation: The New Rules*

The next part of this report addresses three questions:

- 1. What do next generation audiences want?**
- 2. How can we develop programming for younger audiences?**
- 3. How do we market and sell arts and culture programming to younger audiences?**

### **1. What do next generation audiences want?**

Simply stated, the next generation wants to be engaged at a level beyond the art itself. The next generation wants a creative experience that includes learning, connecting, and/or sensing.

Nationwide research shows that the art itself, although a critical component, may no longer be what draws patrons to arts events. As we move to an “experience economy,” (Pine & Gilmore, *The Experience Economy*, 1999) audiences and younger generations in particular, are eschewing their role as passive voyeurs of the arts and asking to be engaged—with each other, with the art, and even with the artist.

Our research among arts patrons in Indianapolis confirms national research and further shows:

- The most popular reason 20-40 years olds attend arts and culture events is to **learn something**;
- **Being social** is the second most popular reason young patrons attend arts and culture events;
- **Supporting an artist or arts organization** ranked third among the reasons all arts patrons (regardless of age) attend arts and culture events.

### **Experience trumps mission**

Our research shows many young people who, when asked for examples of their arts participation, mentioned for-profit galleries, house concerts, rock shows, and music clubs. These young people didn’t consider arts events to only be non-profit arts events, but rather had a much broader definition of “art.” Additionally, in a number of our interviews, young people referred to supporting the arts in ways that would make development directors cringe: buying art from artists, attending festivals, and buying CDs after concerts.



*Simulated* experiences are a popular alternative, allowing people to stay at home, watch DVDs of live concerts, and see media art online. In 2002, 56% of Americans accessed some genre of art through alternative media. Only musicals and plays have a clear lead over their simulated audiences. (NEA, Survey of Public Participation in the Arts, 2002.)

Offering experiences has bottom-line benefits. Cirque de Soleil productions are an excellent example. Their multi-sensory, eye-popping appeal results in sold out shows night after night where the average ticket price hovers at \$100.

Like Cirque, the arts have an innate advantage in an Experience Economy because they naturally provide compelling, dramatic, sensory, authentic or surprising experiences to patrons.

## **2. How do we develop programming that younger audiences want?**

Younger audiences want creative experiences centered on learning, connecting, and sensing. How do arts organizations capitalize on these “experience drivers?”

The Children’s Museum of Indianapolis is a one local example of an arts organization that excels in all three of the following drivers:

**Learning:** A primary belief at the Children’s Museum is that 95% of all learning happens outside of the classroom. Therefore, they seek ways to make learning fun and central to the core of all programming.

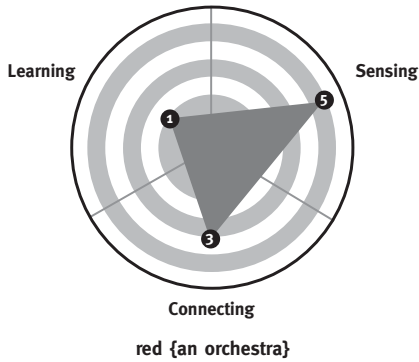
**Connecting:** The Children’s Museum has families and classes as visitors. Therefore the programs and exhibits must leverage and recognize that most visitors are coming with someone, and must design programming to accommodate these connections. Intergenerational exercises and peer-to-peer activities are recommended throughout the exhibits, making “connecting” a natural part of the Children’s Museum experience.

**Sensing:** Many people—children, adults and retirees—are kinesthetic learners; that is, they learn best by *doing*. The Children’s Museum ensures that their exhibits are multi-sensory. A child can touch the art, not just look at it. Videos, kiosks, and even the toys for sale in the gift shop reinforce the multi-sensory experience of the museum.

### **Drivers of an Experience**

For the purpose of this report, we refer to three Experience Drivers: **Learning, Connecting, and Sensing.**

We call them “drivers” because by leveraging them, arts and cultural organizations will create the kind of experiences young patrons crave.



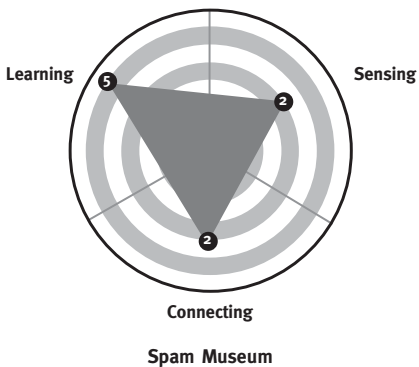
Other examples include:

*High Sensing*

**Red {an orchestra}** in Cleveland, Ohio is not the Cleveland Symphony Orchestra. And it's not trying to be. But red's concerts are sell-outs and their reputation is excellent. Why? Because they partner with puppeteers, local artists, and travel regionally to bring a multi-sensory experience to their patrons. Learn more at <http://www.redanorchestra.org>.

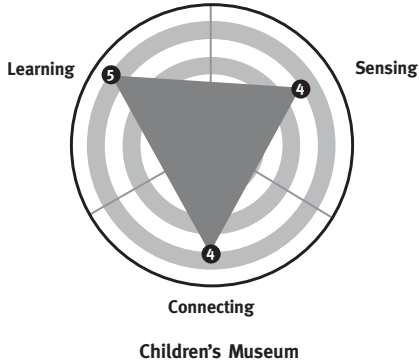
*High Learning*

The Spam Museum in Austin, MN and the Holocaust Memorial Museum in Washington, D.C. couldn't be more different in their content or approach. But they have one thing in common: Both are excellent examples of organizations that have made learning a key driver in their programming. By installing movies, interactive kiosks, and showcasing engaging narratives into their experiences, visitors cannot help but learn more during their visits. Further, each organization has put a great deal of content on their websites, to extend the learning beyond the patron's visit.



*High Connecting*

The Milwaukee Art Mob is a group of young professionals who attend plays, art openings, concerts, and cultural lectures en masse. With tools as rudimentary as an email distribution list, a self-appointed "mob leader" chooses a date and a performance, reserves a block of tickets, and organizes the pre- and post-meetings.



Like book clubs, "Play Groups" are also emerging in some cities. Members of the group purchase the same play and meet at someone's house to read through the script together.

How can your organization introduce richer levels of Learning, Connecting and Sensing into your programming? Consult the table, Experience Strategies, on page 32.

**3. How do we market and sell to younger audiences?**

Its now widely understood that it takes more—more media impressions and therefore more money—to attract declining numbers of patrons through traditional media channels including the newspaper, television and radio.

There's a simple explanation for this: These are not the primary places where younger patrons learn about the arts.

**DEFINITION:**  
**Marketing:**  
 The art of getting their attention.



### *Meet them where they are*

When asked, “How did you learn about the last arts and culture event you attended?” the survey sample of all 20-40 year-olds responded:

<b>From a friend</b>	32%
<b>Email promotion or listserv</b>	12%
Mailed promotion	11%
Newspaper	11%
<b>Web sites</b>	10%
Alternative News	9%
Radio	9%
Television	5%



### *In summary*

This report can serve as a guide for arts organizations to capture and learn more information about the profiles of their users, as their programming process incorporates a focus on the experience from a sensing/learning/connecting viewpoint, and as marketing teams begin to deliberate on best uses of marketing dollars to reach young patrons.

The following Experience Strategies were formed through the lens of a young patron for consideration when creating a sensing/learning/connecting focused experience. While we are not recommending that an organization has to be strong in all three areas to be successful, at least one has to be prominent and successfully packaged.

Next Generation Consulting would like to acknowledge the following people and organizations as key contributors to this body of research:

- The Lilly Endowment
- The Arts Council of Indianapolis
- The Indianapolis Arts Development and Participation Team (I-ADAPT)
- The research participants – interviewees, focus group participants
- Web survey respondents