CAPACITY INTERACTIVE

PERFORMING ARTS TICKET BUYER MEDIA USAGE STUDY

Results of a Survey of North American Ticket Buyers by WolfBrown and Capacity Interactive

December 2017

Performing Arts Ticket Buyer — Media Usage Study
Introduction

In a rapidly changing media environment it can be difficult for performing arts organizations to keep up with ever-evolving audience behavior. While it is clear that their patrons' interests, media habits, and communications preferences are changing, it's not always evident *how* they are changing, and data specific to performing arts buyers has been difficult to come by. Many organizations, particularly smaller ones, don't have the necessary resources to commission extensive market research, and it's often questionable whether the trends in media habits and online behavior observed in studies of the general population apply to performing arts audiences, who are, after all, a self-selecting and somewhat exceptional sub-group within the population.

Through an innovative partnership, Capacity Interactive and WolfBrown sought to address this gap by producing a definitive report on the media habits of performing arts patrons in the US and Canada. Beyond general media usage patterns, we have sought to determine through which channels patrons are most likely to learn about upcoming performing arts events and which devices they use in the information gathering and purchasing processes.

Capacity Interactive and WolfBrown are pleased to present new data-driven insights on ticket buyers for performing arts events. The results are based on almost 27,000 responses to an online survey from patrons of 58 performing arts organizations across the US and Canada. This white paper presents key findings from WolfBrown's analysis of the data along with insights from Capacity Interactive that suggest practical applications for digital marketing.

Digital Marketing Insights from CI

If time and money were unlimited, we'd customize a marketing plan for each audience member. In reality, arts marketers have to prioritize based on knowledge of their audience and the tools at their disposal, making choices that will maximize the impact of their budget. Throughout this report, you'll find insights from CI that give specific applications for digital marketing with that end in mind.

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   Ticket buyers are usually seeking content about upcoming programs when they visit an arts organization's website.

7. Digital Devices and Arts Websites

   40% of all respondents who accessed the Study Partner's website in the past 12 months used a smartphone to do so at least once.

8. Digital Devices and Ticket Purchase Preferences[1]

   79% of respondents say they're most likely to purchase tickets online.

   95% of respondents purchased tickets online in the past 12 months and 37% of those purchased on a smartphone.

Permission Marketing Is Your Road Map

Digital Marketing Insights from CI

As you can see from the key findings, the study covered topics ranging from digital platforms to media consumption to website behavior to device preferences. There are a lot of specifics we'll discuss, but the most important application of the data is confirmation of a framework for digital marketing.

Broadcasting ads and interrupting audiences with your message has given way to a more targeted and precise model of permission-based marketing where you gain and maintain permission to contact your audience. You do this through gathering qualified leads: email addresses, social follows, and pixeled browsers (for remarketing) of audiences that make sense for your organization's goals. You then earn the right to keep that permission by delivering anticipated, relevant, and personal messages to those audience members. This evolution isn't optional - it's occurred as a result of the changes in media and communications over the last two decades.

Similar to how the traditional marketing funnel focused on moving people towards the high-value bottom position of loyal customers, permission marketing focuses on moving audiences along from strangers to friends to customers to evangelists. But, unlike the traditional interruption marketing funnel, the process is more targeted and cost-effective, because you're not spending money trying to acquire audience members who aren't the right fit for your organization.

In full swing, here's how it can look:

A potential patron Googles "things to do this weekend" and your non-branded SEM ad appears.

They click through and land on your content-rich website landing page.

They peruse several pages, getting a feel for your programmatic offerings and sign up for your email list.

Since you've added cookies to their browser, you're able to remarket to them via display ads and on social media, where you'll acquire them as a follower on Facebook, as well.

You initiate a customized email cascade that is tailored to the areas where they showed interest on your website.

Seeing different relevant and personal touchpoints on several channels, they return to your website and purchase tickets to a show for the weekend.

You email them after the show, and they share content on Facebook after watching clips of the production on your website.

They plan another outing to your organization with friends (who liked their post on Facebook), and you have the opportunity to capture new leads.

To sum it up in the words of Seth Godin (author of the classic Permission Marketing), "anticipated, personal, and relevant advertising always does better than unsolicited junk."[2] We couldn't say it better ourselves.

Performing Arts Ticket Buyer — Media Usage Study
Methodology

To reach a wide cross-section of ticket buyers across North America, WolfBrown and Capacity Interactive reached out to current and past clients to invite their participation in this groundbreaking study. Sixty-three performing arts organizations across the US and Canada initially signed up for the study, and 58 organizations completed all the requirements. There was no cost to participate.

All Study Partners (that is, all participating organizations) agreed to distribute the survey to at least 2,000 recent ticket buyers during a three-week period in August 2017. The decision as to which specific group(s) of ticket buyers to survey was left to each organization. While 2,000 was the minimum number of patrons that needed to be contacted in order to participate in the study, several organizations reached out to over 10,000. No financial incentives were offered to survey participants. The methodology relied on the Study Partners to interpret the findings with minimal support. A condition of participation was that all Partners agreed to share their data with each other at the organizational level via WolfBrown's online dashboard reporting interface (IntrinsicImpact.com). This commitment to full transparency allowed Partners to compare their results to any other Partner's results, as well as aggregate results.

This allowed for interpretation of results in three contexts:

1. In the context of results of other specific organizations
2. In the context of aggregate results within one of four disciplines (dance, theatre, music, multi-disciplinary presenters)
3. In the context of the overall aggregate of all 58 organizations

To maintain the confidentiality of our Study Partners' data, this report only reflects aggregated survey results.

Performing Arts Ticket Buyer — Media Usage Study
Methodology

WolfBrown designed the initial protocol for the online survey in consultation with Capacity Interactive, but all Study Partners were invited to review and comment on the survey questions in advance of the launch.

While the de-centralized survey recruitment process yielded a large number of responses from a broad cross-section of performing arts patrons (see sample description on page 8), it is impossible to determine whether the sample is fully representative of performing arts attendees in general, in a statistical sense. As with all audience surveys of this type, the sample is self-selecting, which gives rise to potential response biases. Moreover, since respondents were exclusively recruited via email and the survey was administered online, the sample only includes people who use digital media.

In past surveys of performing arts ticket buyers, we have found loyalty bias (i.e., those who are strongly committed to a particular organization are more likely to respond to that organization's survey request) to be the most prominent source of bias. For that reason, we calculated separate response rates for subscribers and single ticket buyers within each organization's sample and weighted the two groups to account for subscribers' higher propensity to complete the survey. Since both the sample sizes and the response rates vary considerably from one Study Partner to the next, we also weighted the responses to ensure that each organization is reflected equally in the aggregate results to prevent small organizations from being "drowned out" by organizations with larger audience numbers.

Performing Arts Ticket Buyer — Media Usage Study
Sample Description

Through the recruitment efforts of the 58 Study Partners (listed on page 25), we received a total of 26,996 valid responses. To our knowledge, this is one of the largest multi-site patron surveys ever conducted.

While the geographic distribution of participating organizations merely reflects which organizations opted into the study, the chart below shows that the respondents are not solely drawn from major performing arts markets. Rather, the sample includes responses from 24 US states (plus Washington, DC) and four Canadian provinces.

While we cannot generalize about performing arts patrons overall as a result of the self-selecting nature of survey participants, the sample sizes are sufficient to explore variations among several sub-samples, for instance between arts disciplines. While theatre ticket buyers and patrons of multi-disciplinary performing arts presenters are most heavily represented in the sample (with over 9,000 responses each), we also received several thousand responses from dance and music ticket buyers.

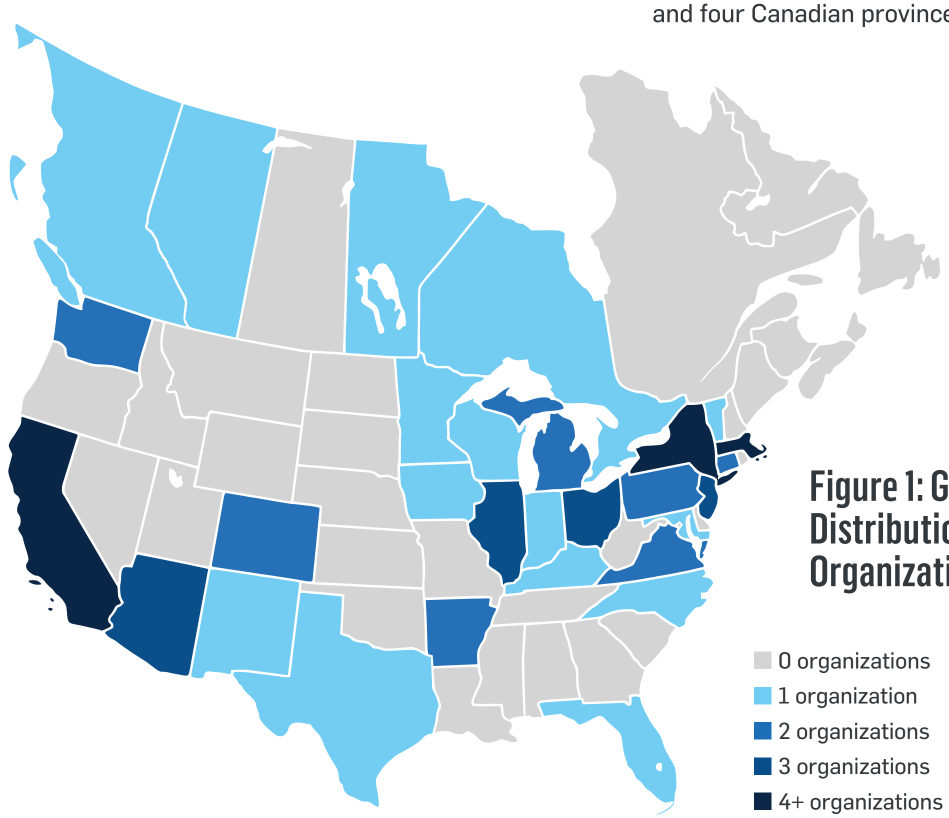
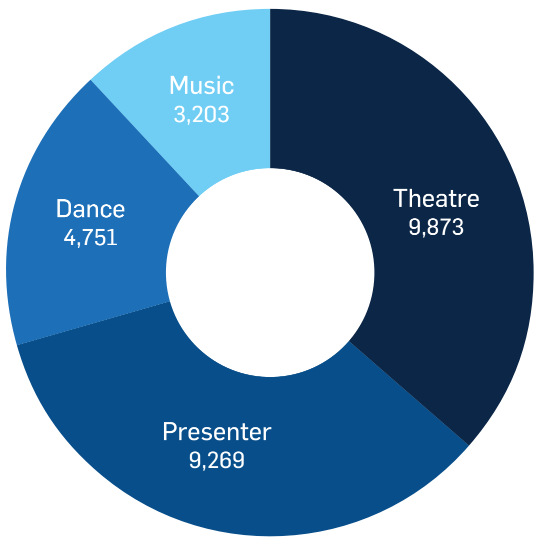


Figure 1: Geographic Distribution of Participating Organizations

Figure 2: Number of Responses, by Discipline/Type of Organization Visited



Performing Arts Ticket Buyer — Media Usage Study
Demographic Summary

Gender, N = 26,773	Number of Respondents	% of Sample
Female	18,280	68%
Male	8,024	30%
Transgender	18	0.1%
Other gender identity	51	0.2%

Age Cohorts, N = 26,066 (Ave. Age = 55.5)		
<18	76	0.3%
18-24	892	3%
25-34	2,248	9%
35-44	3,240	12%
45-54	4,471	17%
55-64	6,417	25%
65-74	6,130	24%
75+	2,592	10%

Race/Ethnicity (multiple selections allowed, does not sum to 100%) N = 26,970		
African American or Black	1,049	4%
Hispanic or Latino	915	3%
Middle Eastern or North African	127	0.5%
Indian or South Asian	212	0.8%
Other Asian or Pacific Islander	890	3%
Native American or Alaska Native	181	0.7%
White/Caucasian	21,757	81%
Other	426	1.6%

Education, N = 26,799	Number of Respondents	% of Sample
Less than 9th grade	17	0.1%
9th to 12th grade, no diploma	52	0.2%
High school graduate or G.E.D.	476	1.8%
Some college, no degree	2,177	8%
Associate degree	1,032	4%
Bachelor's degree	8,594	32%
Graduate or professional degree	14,451	54%

Attendance at Ticketed Performing Arts Events in Typical Year, N = 26,938		
0*	125	0.5%
1	855	3%
2 or 3	3,920	15%
4 or 5	5,276	20%
6 to 10	6,991	26%
11 to 20	5,985	22%
21 to 50	2,947	11%
More than 50	840	3%

*Respondents were asked the number of ticketed performing arts events they attend in a typical year. However, to qualify for the study, they must have attended at least one at the Study Partner's organization in the last two years.

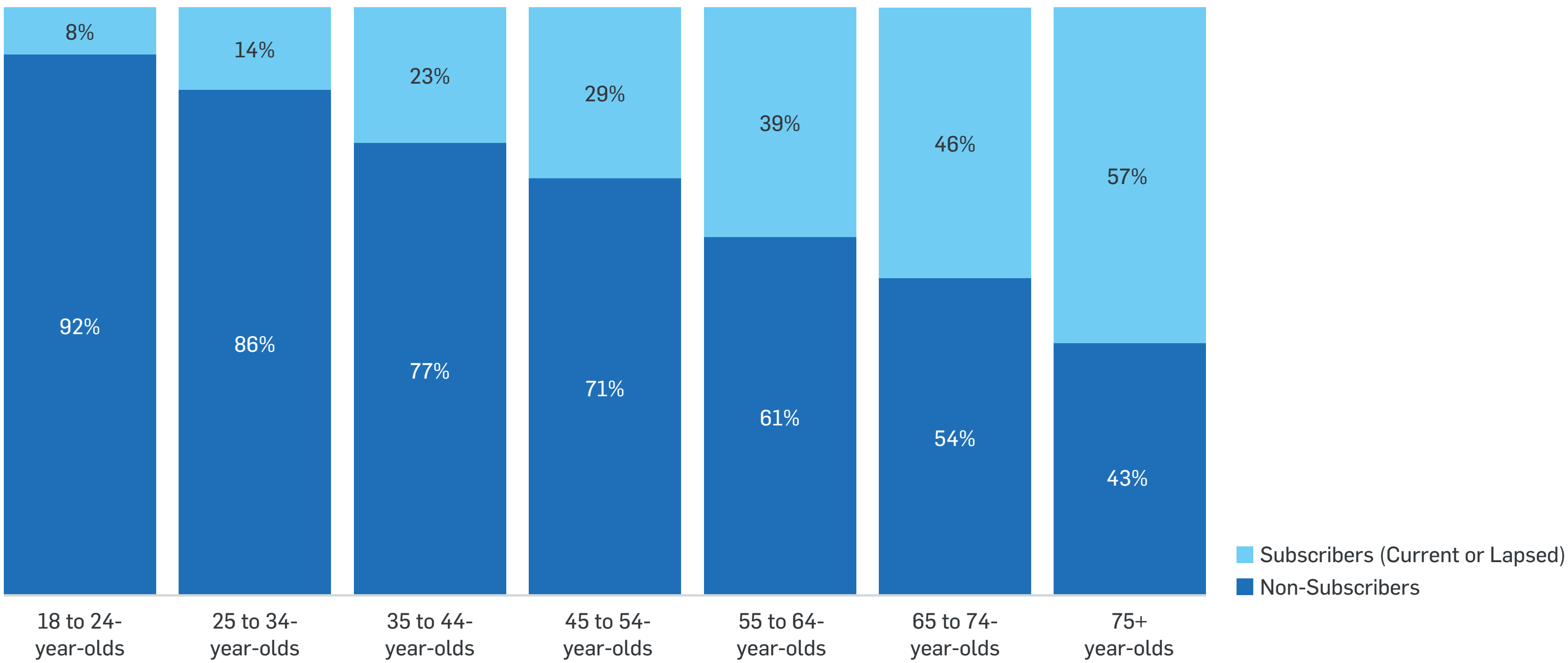
Table 1: Demographic Summary (Gender, Age Cohorts, Race/Ethnicity, Education, Attendance at Ticketed Performing Arts Events in Typical Year)

1. Generational Differences

Generational shifts are driving differences in a wide range of ticket buyer behaviors, such as — a) subscribing to arts organizations.

Age is an important driver in determining how patrons relate to the arts organizations they frequent, and how they engage with media. For instance, a strong correlation was observed between age and subscription purchase, with approximately half of all respondents over 65 either currently subscribing to the organization that invited them to take the survey or having subscribed to that organization at some point in the past (Figure 3). We don't yet know if the current 20-, 30-, and 40-year-olds will become more inclined to subscribe as they age or whether their preference for purchasing individual tickets is here to stay.

Figure 3: Incidence of Subscription Purchase (Current or Lapsed), by Age Cohort

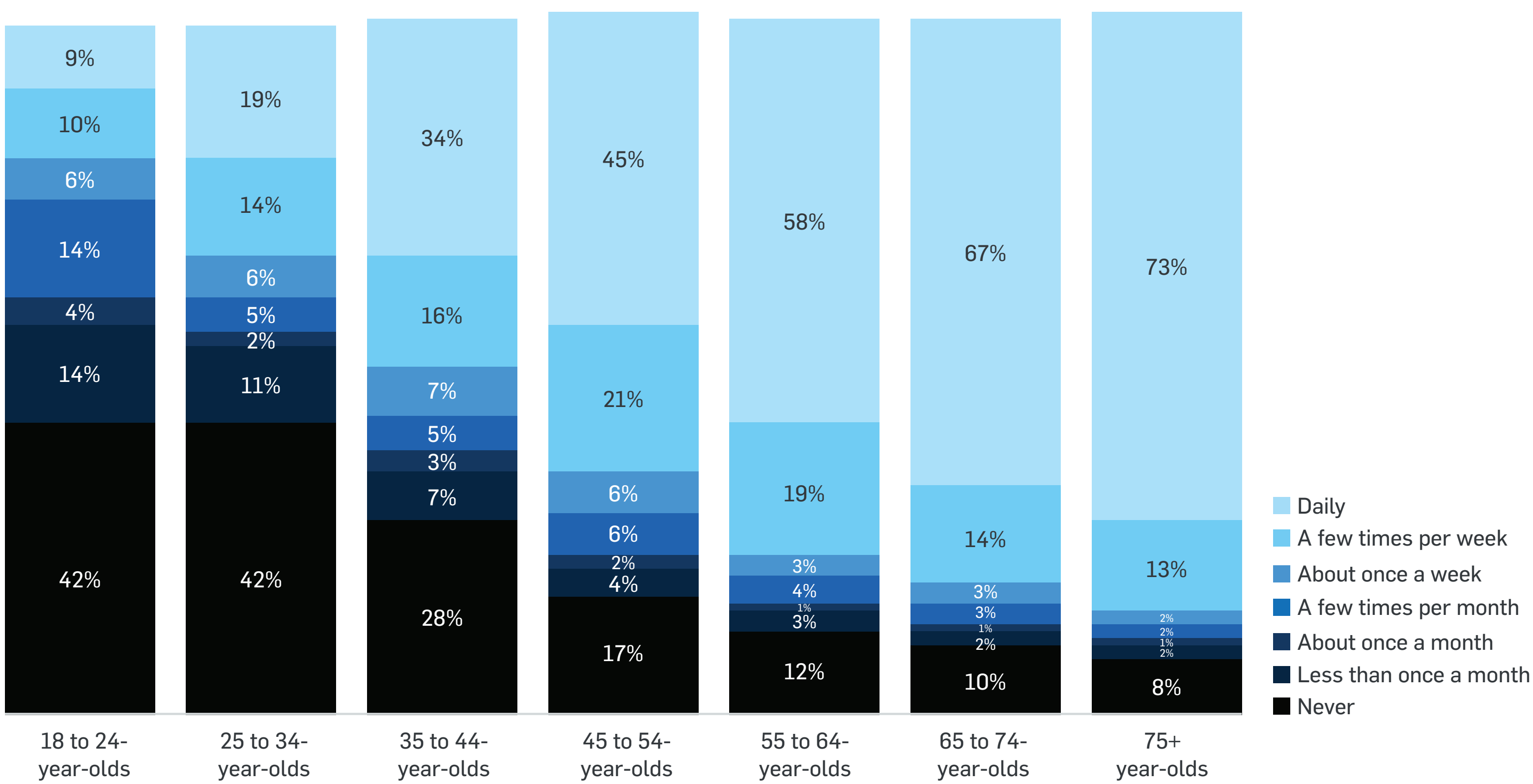


1. Generational Differences

Generational shifts are driving differences in a wide range of ticket buyer behaviors, such as — b) watching TV.

There are also clear age-related patterns in media consumption habits among performing arts ticket buyers. For instance, older ticket buyers are much more likely than younger ticket buyers to watch television (i.e., cable, broadcast, or satellite television; Figure 4).

Figure 4: Frequency of Watching TV (Broadcast, Cable, Satellite), by Age Cohort

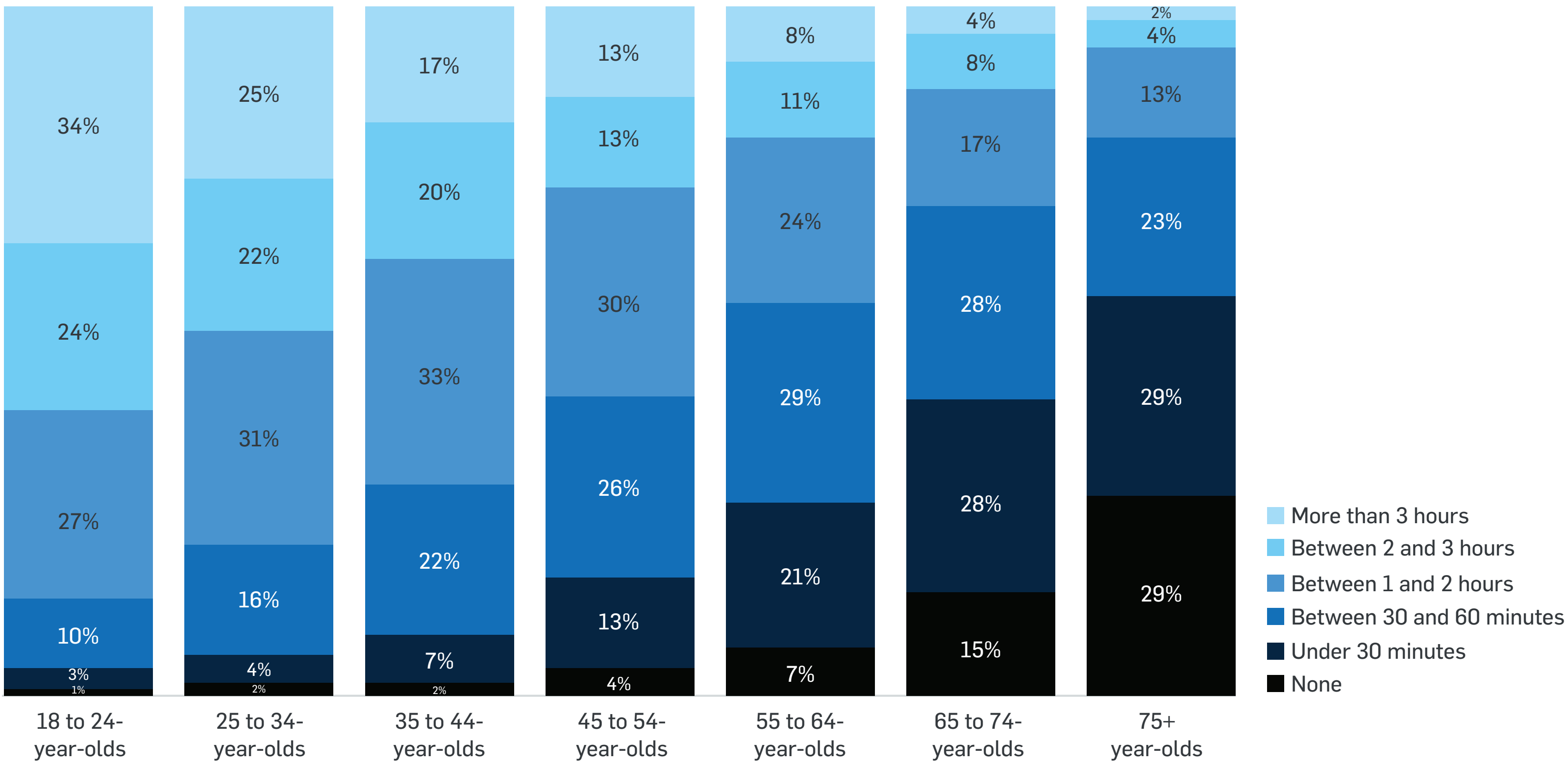


1. Generational Differences

Generational shifts are driving differences in a wide range of ticket buyer behaviors, such as — c) smartphone use.

Not surprisingly, significant age-related differences exist in device usage, with younger ticket buyers much more likely to spend multiple hours a day on their smartphones.

Figure 5: Time Spent on Smartphone on a Typical Day, by Age Cohort



1. Generational Differences

Younger ticket buyers use digital media more heavily and are more mobile-centric.

To summarize the correlations between age and media consumption habits, one may say that older ticket buyers tend to rely on traditional media (i.e., print and broadcast), whereas younger ticket buyers use digital media more heavily (Figure 6).

Age related differences also underlie several of the trends highlighted in other key findings of this report.

Figure 6: Key Relationships between Media Channels and Age

Media Channel	Correlation with Age
Print Newspaper Readership	Usage increases with age
TV (Cable, Broadcast, Satellite)	
Public Radio	
Email News Notifications	
Online News Sites	Usage is highest for middle age cohorts
Commercial Radio	
News Organization's App	Usage decreases with age
News via Push Notifications	
Online Streaming (Audio and Video)	
Social Media Usage (All Platforms)	

Digital Marketing Insights from CI

The study confirmed what we all know intuitively, that we're living in a rich, multi-channel world. We're at a moment of flux between the media vehicles that drove the 20th century consumer economy (and the reign of interruption marketing) and the 21st century tools of digital and social (and the evolved approach of permission marketing):

Younger generations have fully embraced the new tools.

Older generations are still holding on to some of these old methods while more and more are using new channels.

In order to keep your content anticipated, relevant, and personal on the different channels, segmentation is key. Arts audiences aren't monolithic - experiment with value propositions and tone, and see what works best for your different audience segments based around meaningful distinctions of behavior, preferences, and demographics.

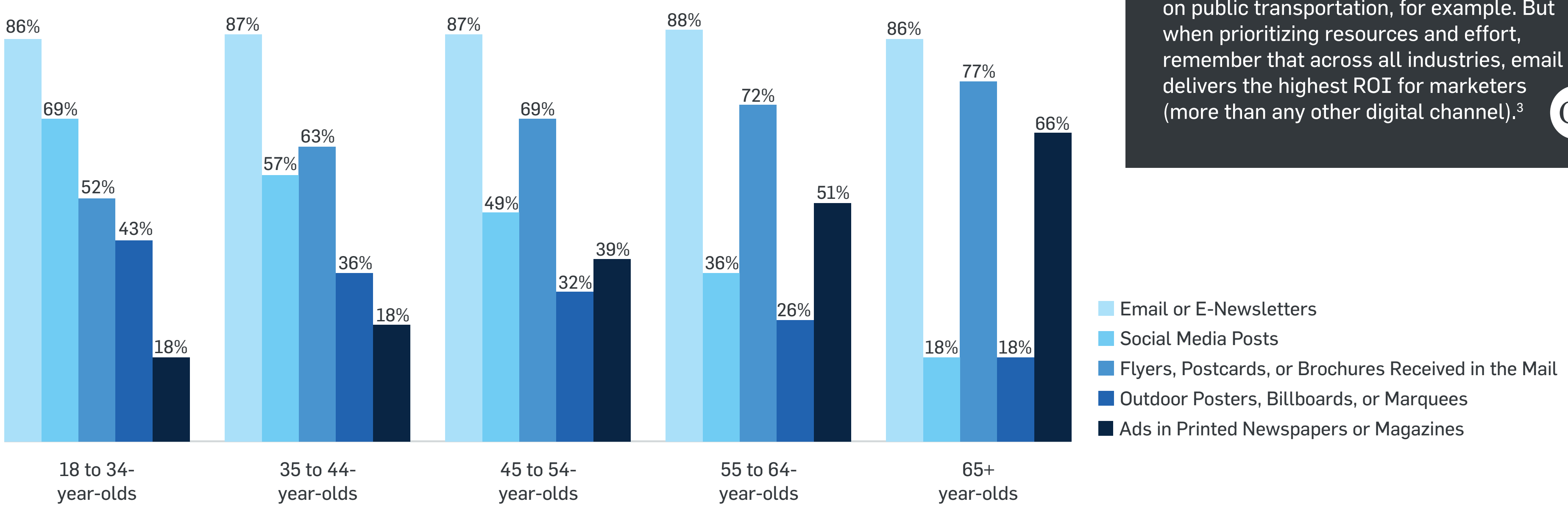
2. Sources of Arts Events Information

Email is the primary source of information for upcoming events across all age cohorts.

When respondents were asked if they regularly receive information about upcoming performances in reference to a list of eleven media channels, email emerged as the most important source of information across all age groups, with over 85% of all respondents saying they get information about events that way.

While the results are remarkably consistent across age groups for email, there are clear age–related patterns for other media (Figure 7). For instance, social media and outdoor advertising are important sources of information for the youngest respondents, but their significance falls off sharply for older generations. Conversely, flyers, postcards or brochures received in the mail, and ads in printed newspapers or magazines are the second and third most highly ranked categories among respondents over 65, but are less consequential in the younger age groups.

Figure 7: Most Common Sources of Information about Upcoming Events, by Age Cohort



Digital Marketing Insights from CI

The data has spoken - email is going strong. Here's compelling evidence that permission marketing works and is a vital source of information for audiences. It's crucial to invest in your email program by capturing high quality email addresses and creating anticipated, relevant, and personal email content for patrons.

Clearly, other touchpoints have impact, and you can see how segments differ. It could be that younger audiences tend to be more urban-dwelling and take in more advertising on public transportation, for example. But when prioritizing resources and effort, remember that across all industries, email delivers the highest ROI for marketers (more than any other digital channel).[3]

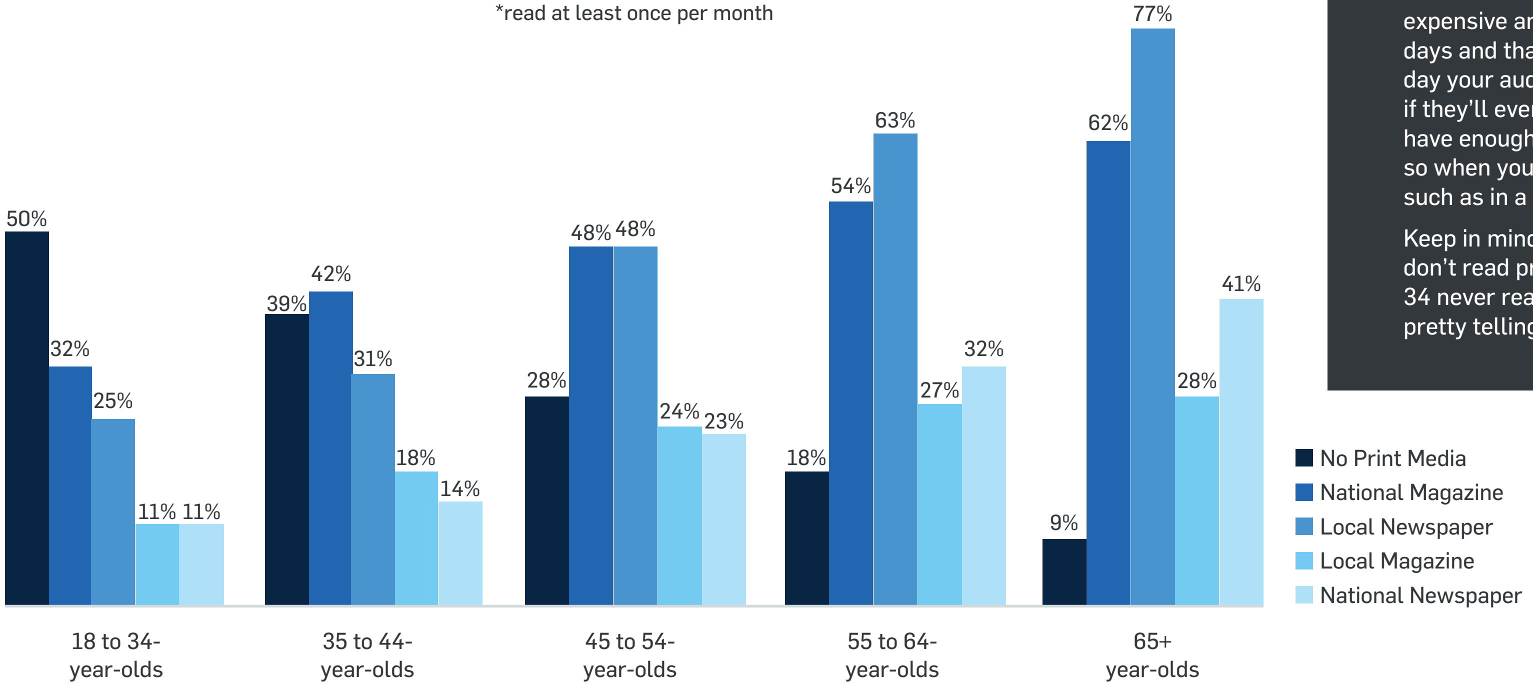
3. Media Consumption

All print media readership increases with age, but print readers (even those over 65) are also active online.

Readership of print news media (i.e., local and national newspapers and magazines in print format) rises dramatically with age. Sixty-three percent of all respondents between 55 and 64 years old read a local newspaper in print format at least once a month, and that figure increases to 77% for those over 65. Meanwhile, only 25% of those under 35 read local newspapers in print format on a regular basis (and 50% in that age group say they don't read any print news).

Figure 8: Print Media Readership*, by Age Cohort

*read at least once per month



Digital Marketing Insights from CI

We certainly don't think you should stop using all non-digital media. In fact, the data in this study supports that we're not there yet. Many traditional media channels are being consumed, particularly by older patrons who are frequent attendees, subscribers, and donors. That said, it's important to keep these things in mind:

> Print's drawbacks include that it's expensive and it's static (it runs on set days and that's it). You don't know which day your audience will pick up a paper or if they'll even see your ad. When you do have enough media budget for print, do so when you know it will make an impact, such as in a fall arts preview.
>
> Keep in mind the segment of patrons who don't read print: 50% of those under 34 never read print. We think that's pretty telling for the future.

3. Media Consumption

While older ticket buyers are more likely to read print magazines and newspapers, that doesn't mean they're digital Luddites. Among survey participants over 65 years old[4]:

89% also access news online;

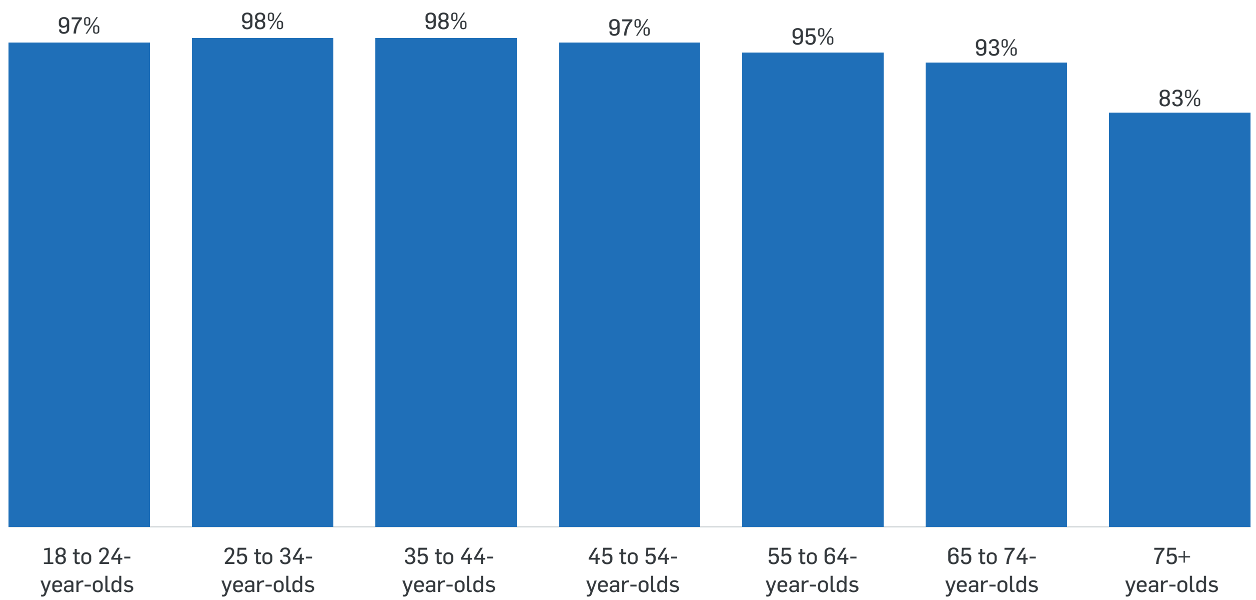
90% purchased performing arts tickets online in the past 12 months; and,

53% are on Facebook.

With the exception of those over 75, all age cohorts are more likely to access news in some digital form than read print publications.

Figure 9: Percentage of Respondents Accessing News Online (All Methods*), by Age Cohort

*Online News categories include: Local and National News Sites, Online News Aggregator Sites, News in Social Media Feeds, News via Email Alerts, News via Mobile Push Notifications, News Organizations' Apps on Mobile



Digital Marketing Insights from CI

As arts marketers we're forced to do more with less - the question is, how can you reach the right people, the most often, at the lowest cost? The data in the study supports that, despite generational differences, email and online media consumption are strong across all ages, as is demand for content on arts organizations' websites. This points towards leaning into digital and supporting it with only the smartest, shrewdest additional investments in traditional channels (until they're obsolete).

A striking finding in the study is that even those most inclined to read print are also online - and that's where tools like display networks, Facebook and other social media platforms, and SEM come in.

These tools have a lot of advantages:

They're more cost effective than print or direct buys on websites.

They allow for more precise targeting of your patron segments on multiple devices.

You get comprehensive tracking to measure results.

Print can't deliver any of that, and it's significantly more expensive.

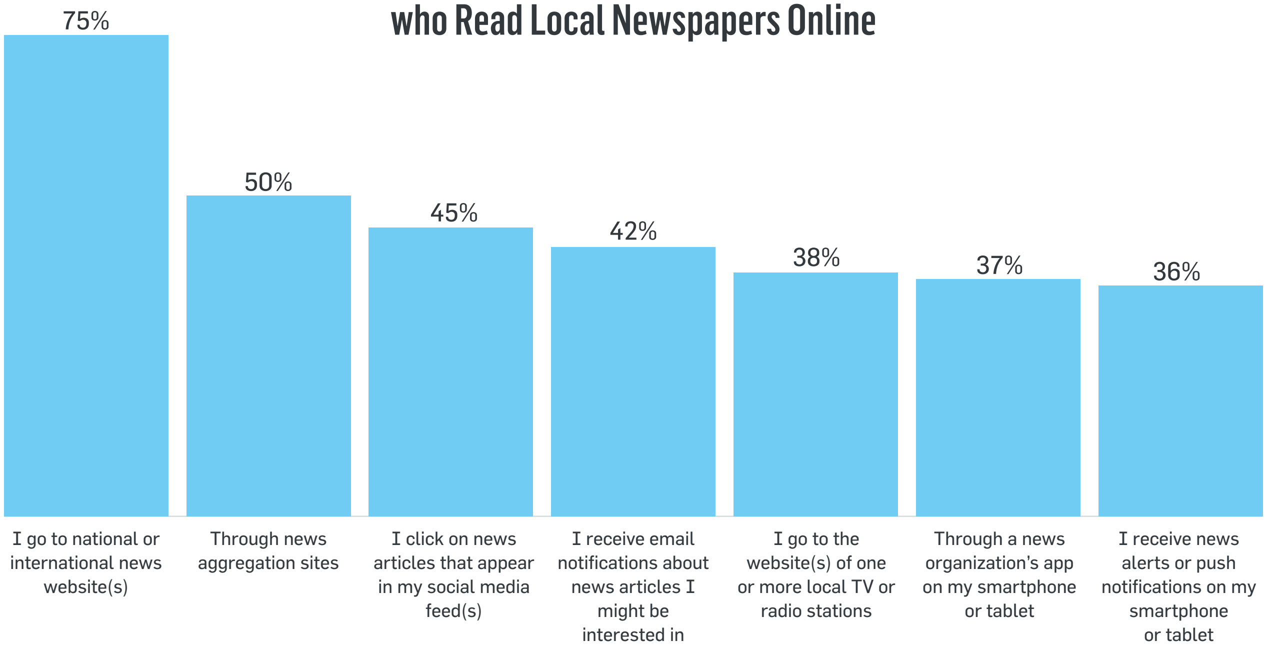
CI

3. Media Consumption

Consumers of online news consult multiple websites and discover news articles through multiple channels.

Consumers of online news find and access articles they are interested in through multiple pathways. Seventy-five percent of the respondents who visit their local newspaper's website also visit the websites of national and international news outlets, and 50% use news aggregation sites such as Yahoo!News, Google News, and msn.com. About a third of those who visit a local newspaper's website access articles through news apps on their mobile devices rather than by visiting websites, and many get push notifications or emails that alert them to news articles that might interest them, or find out about such articles through social media. The pathways through which online readers access news are thus much more complex than in print media.

Figure 10: Pathways to Online News, Among Respondents who Read Local Newspapers Online



Digital Marketing Insights from CI

Still considering direct buys on news sites? The data (Figure 10) shows that people are consuming news all over the web, and not necessarily on your local newspaper's website, or even the national paper's website:

- You can reach new audiences wherever they are on the web via behavioral or interest-based targeting via display networks.
- You can reach bottom of funnel audiences via remarketing if you set up your digital infrastructure to track users based on their actions on your website.

Think of it as precision marketing - targeting qualified leads instead of crossing your fingers and hoping someone interested passes by.

4. Social Media Usage

Although all forms of social media use decrease with age, Facebook is used extensively across all age groups.

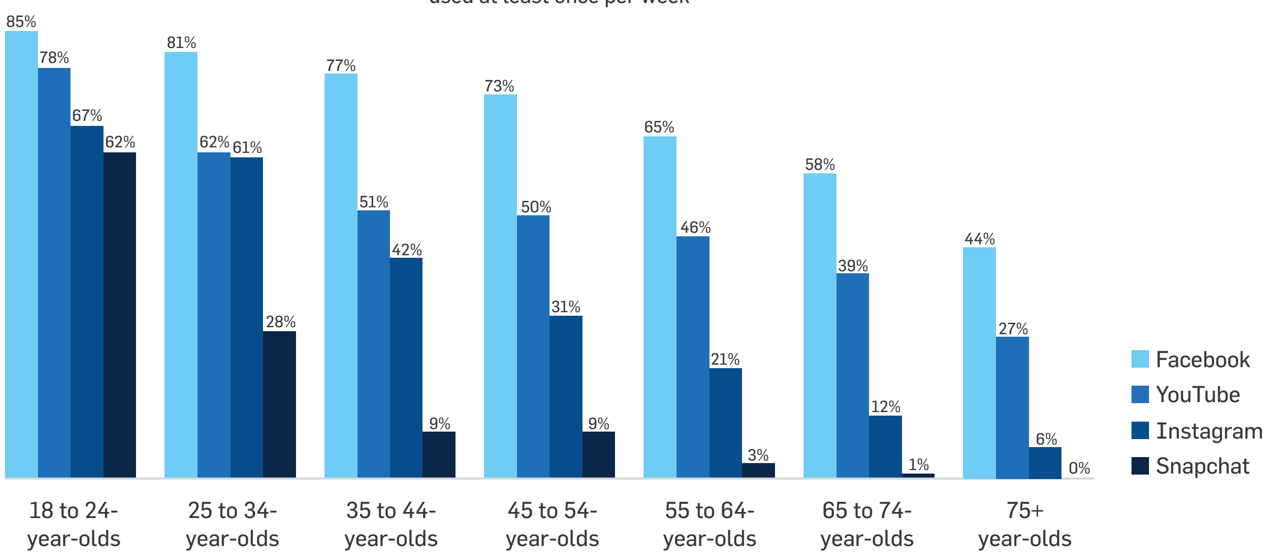
Overall, 65% of all surveyed arts patrons report using Facebook at least once a week. That's a greater proportion than use any other form of print or broadcast media on a weekly basis, with the exception of television.[5]

While Facebook is not immune to the age-related decline among older ticket buyers seen for other social media platforms, even in the 65+ crowd over half (54%) use the platform regularly (Figure 11).

The real difference in social media usage across age groups lies in the almost exclusive focus on Facebook in the older generations, whereas the attention of younger patrons is divided. With over 80% of all under 35-year-olds using Facebook, it is a near-ubiquitous presence in the lives of young people, but those younger ticket buyers are also active on several other social media platforms in any given week. About two-thirds of all under 35-year-olds are on YouTube, almost as many are on Instagram, and in the 18 to 24 age range over 60% are also on Snapchat.

Figure 11: Most Commonly Used Social Media Platforms*, by Age Cohort

*used at least once per week



Digital Marketing Insights from CI

Facebook beats all other media channels except TV, is the leader amongst social media platforms, and is widely used across all age cohorts (even 54% of those over 65 use it at least weekly!). Invest in strong social storytelling on Facebook, even if that means pulling away from other platforms and channels that don't have the same reach.

To do this:

- Enable a strong social storyteller.
- Tap Facebook's native storytelling capabilities by creating a flow of social posts about your organization and offerings.
- Spend a large portion of your budget using Facebook's powerful targeting capabilities, getting these stories to the best prospects based on behavior, interests, and relationship to your organization.

Here are additional benefits to Facebook:

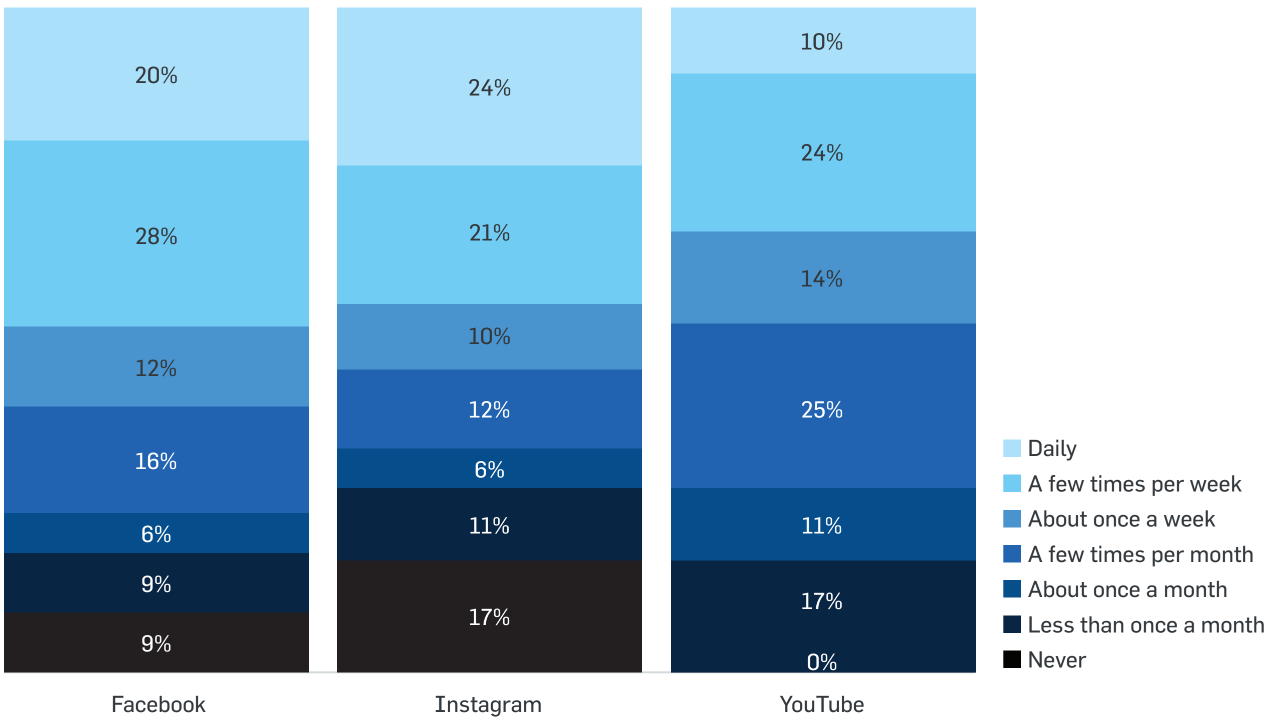
- There's no minimum spend for entry.
- You can storytell in an ongoing, responsive way with audiences, adapting to stay relevant and personal.
- It's a mobile platform and allows for cross-device measurement.
- It has flexible ad types, such as video, slide shows, carousel, and "Canvas".

5. Social Media Usage: Video Viewership

Facebook and Instagram both outpace YouTube in video watching frequency.

Despite the fact that YouTube is a video-only platform and widely used across age groups, the frequency with which videos are accessed on Facebook and Instagram by users of those platforms exceeds that of YouTube. About half of all YouTube users only watch videos there a few times per month or even less frequently, whereas most arts patrons on Facebook and Instagram watch videos on those platforms at least weekly, and 20 to 24% watch daily (Figure 12).

Figure 12: Frequency of Online Video Viewing, by Platform



Digital Marketing Insights from CI

It's clear that video is an important part of what audiences are doing on social media. Close to 50% of respondents watch video on Facebook or Instagram a few times a week or more. This is important because we know video is one of the most impactful forms of content at your disposal:

From a survey from Ipsos Media, 45% of respondents said they think more favorably about a show after seeing a video and 68% said seeing a video influences a purchase.[6]

According to a study from Liveclicker, 88% of retailers saw an increase in conversion when video was added to product pages.[7]

As you may have heard from us before, cut a print ad, create a video! There's no more compelling way to communicate your art than through video, and now you have data that shows audiences are watching.

6. Arts Website Use Cases

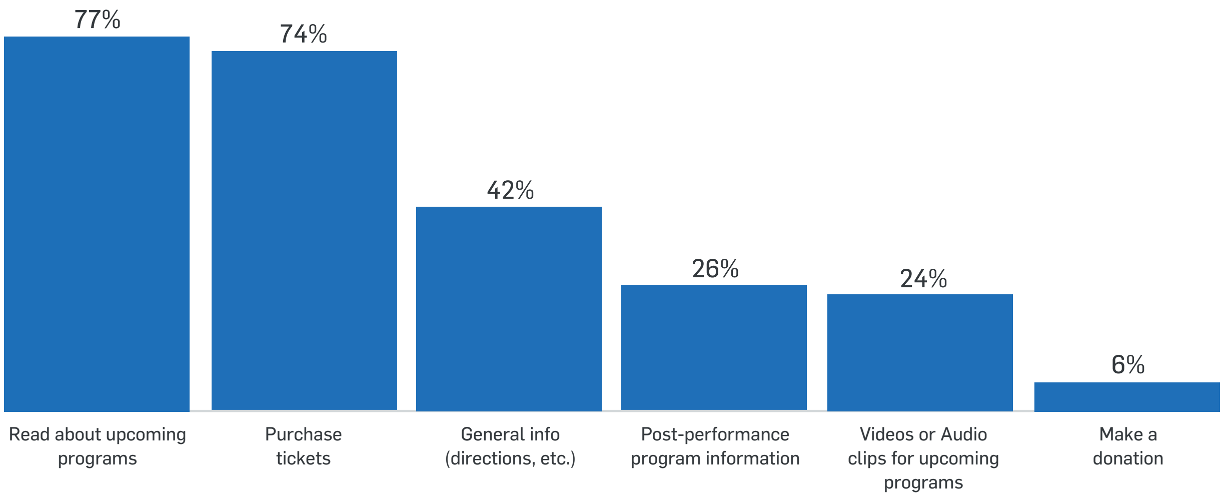
Ticket buyers are usually seeking content about upcoming programs when they visit an arts organization's website.

The number one reason ticket buyers accessed a Study Partner's website was to learn about upcoming programs (selected by 77% of all respondents who accessed a Partners' website in the past 12 months; Figure 13). The second most common reason for visiting the website is to purchase tickets (74%). Accessing general logistical information, such as directions and contact information comes in a distant third at 42%.

While only about one quarter of recent website visitors accessed video and audio content there, it is noteworthy that older ticket buyers were slightly more likely to report watching videos on the site than younger ticket buyers. This stands in contrast to the general patterns for online video watching, which is far more common (and frequent) among younger patrons on social media, and suggests that different ticket buyers access video content through the channels with which they are most comfortable.

Figure 13: Reasons for Visiting Study Partner's Website

(percent of respondents who visited website in past year citing each reason - multiple selections allowed)



Digital Marketing Insights from CI

Audiences love good content about your programming. It's the number one reason they're going to your website.

Your site is the linchpin to your entire digital marketing enterprise, and it requires investment in rich content for production detail pages (such as images, video, audio, and compelling copy) and ongoing monitoring to get the most out of it:

It's where you can get to know your audience by analyzing how they interact with your content through a solid tracking and analytics setup.

Based on those interactions you can optimize your site content. Conduct A/B testing to see if making changes to layout or content drives more sales or engagement.

Consistently gather leads and you can drive future engagement. Audiences visiting your site can be tracked and targeted based on the content they're viewing through display networks, Facebook, and email, leading to even greater return on your website content and tracking investment.

This is particularly important for older audiences who are going to your website for content that they may not be getting on social.

7. Digital Devices and Arts Websites

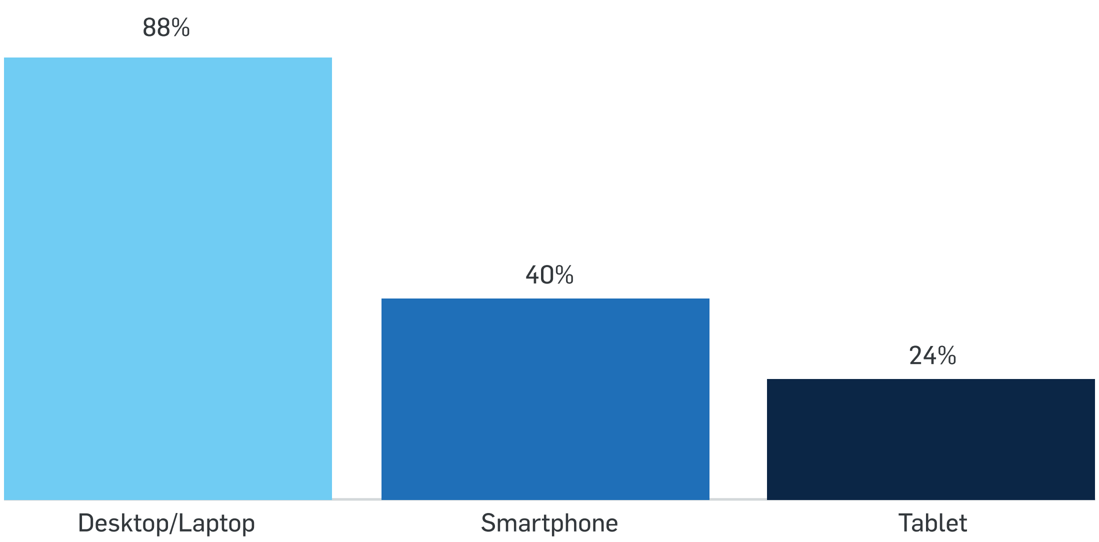
40% of all respondents who accessed the Study Partner's website in the past 12 months used a smartphone to do so at least once.

While personal computers are the most commonly used device to access a performing arts organization's websites (used by 88% of all respondents who accessed a Study Partners' website in the past year), 40% of all website visitors used their smartphones and 24% used a tablet to access the site at least once in the past 12 months. Mobile access is thus far from the exception (Figure 14).

What's more, of those visitors who accessed the site on a desktop or laptop computer, 38% also used their smartphones to access the site at least once in the past year (and 20% used a tablet). That means over a third of all website visitors are using multiple devices to visit the site – presumably choosing whichever device is most convenient at a given moment or for a given purpose.

Figure 14: Devices Used to Access Study Partner's Website in Past 12 Months

(among respondents who visited the website)



Digital Marketing Insights from CI

We've long known the importance of mobile for web browsing, and in particular for researching online.[8] The study shows that arts audiences are no different. Today's path-to-purchase is complex, crosses multiple devices, and relies on mobile as a critical step in the path more than ever before. According to Google, 65% of decisions start on mobile and end on a different device.

Strong SEO and SEM ensure that users can discover you, whether they know you by name (branded searches) or if they're looking for something in your area (non-branded searches).

If your mobile experience is lacking in speed or quality once they arrive on your site, you'll lose people not only on mobile. Like dominos falling you'll also negatively impact the quantity of future visits and sales on desktop, on the phone, and in-person at the box office. Focusing on mobile isn't optional:

Google is moving towards a mobile-first indexing algorithm, meaning it will rank and index your site based on your mobile experience rather than your desktop experience.

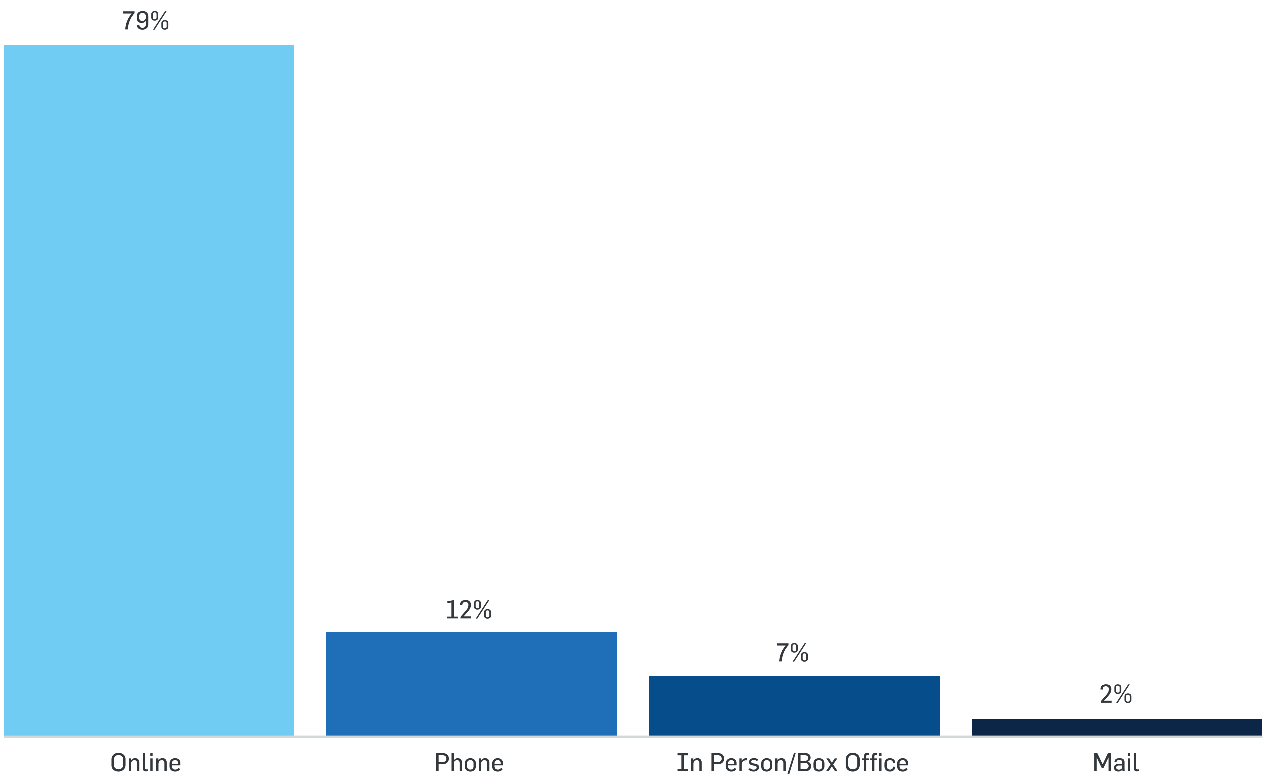
If your mobile experience suffers from slow site speed, lack of responsiveness, or a host of other factors, you won't rank as highly and audiences won't find you as easily.[9]

Fortunately, there are lots of tools to help you make sure this isn't the case. Here's where you can get started by testing to see how your mobile speed rates: https://testmysite.thinkwithgoogle.com/.

8. Digital Devices and Ticket Purchase Preferences

79% of respondents say they're most likely to purchase tickets online (compared to 12% who more commonly purchase tickets by phone, 7% who tend to go to the box office in person, and 2% who order by mail).[10]

Figure 15: Likely Method to Purchase Tickets



Digital Marketing Insights from CI

Even if they're reading print or watching TV, patrons are going online to buy tickets. It's vital to make the experience seamless, no matter what device they use or whether they're buying single tickets or subscriptions.

We discussed how your website is the linchpin to your marketing strategy - how the data around the ways patrons use your website makes it imperative that marketers embrace the role of storytellers and content creators to invigorate the user experience on their site. The data in Figure 15 further empowers marketers to own this important marketing channel, ensuring the best user experience all the way through the purchase path to conversion.

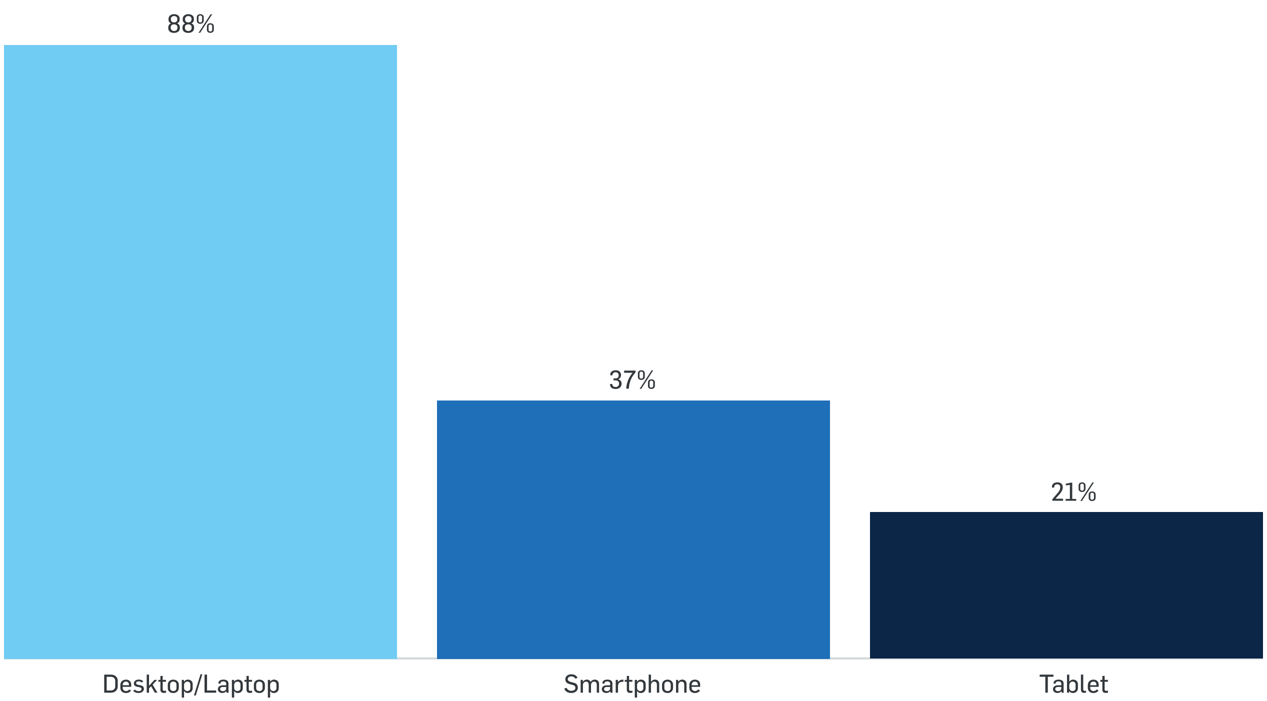
8. Digital Devices and Ticket Purchase Preferences

95% of respondents purchased tickets online in the past 12 months and 37% of those purchased on a smartphone.

While desktop/laptop use predominates, of those who bought tickets online, 37% used a smartphone to purchase performing arts tickets at least once in the past year (Figure 16). In fact, 35% of respondents who purchased performing arts tickets on a desktop in the past year have also used a smartphone to purchase tickets at least once, highlighting the extent to which devices are used interchangeably.

Figure 16: Devices Used to Purchase Tickets Online in Past 12 Months

(among online buyers)



Digital Marketing Insights from CI

The data shows how important your website and mobile experience are to your ticket sales.

And, as you've read, getting your audience to the point of conversion relies on a strong digital infrastructure that makes an integrated, permission-based approach to digital marketing possible. This culminates with a user-focused, mobile optimized website and purchase path that allows for a frictionless, fast, cross-device experience.

Since many arts organizations use third-party ticketing platforms, as a field we need to collectively encourage those vendors to create optimal mobile experiences so that the final steps to conversion don't undermine the work you've done to get audiences to that point.

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Performing Arts Ticket Buyer — Media Usage Study
Final Thoughts

This has been an exciting research project for WolfBrown, as the innovative methodology for developing and deploying the survey demonstrates the power of a field-wide, collaborative approach to market research. While some of the benefits of this approach are only available to organizations that participated in the study, who can compare their responses to their peers' on an online dashboard and create custom reports using filters, the aggregate responses explored in this report yield a nuanced picture of consumers' preferences and behavior across a broad cross-section of performing arts organizations.

Although we can't be sure that the data is representative of all ticket buyers across North America, the generous sample of 27,000 responses allows us to explore trends within subpopulations to a degree that is rarely achieved in arts research. We are inspired by the promising results of this pilot and look forward to exploring the possibilities of this research approach further in the future.

Digital Marketing Insights from CI

We hope the digital marketing insights shared throughout this report contextualize the data and provide steps you can take to prioritize your marketing resources. An important final takeaway is the importance of ongoing analysis of your audience - both through analytics data and audience research such as what you've seen in this report, or a study more specific to your organization.

We're grateful to the 58 participating organizations in this study and look forward to continuing to bring actionable data about performing arts audiences in partnership with organizations in the field.

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Performing Arts Ticket Buyer — Media Usage Study
Our Study Partners

Actors Theatre of Louisville
Alley Theatre
Annenberg Center for the Performing Arts
Aspen Santa Fe Ballet
Ballet Arizona
Bienen School of Music
Boch Center
Boston Ballet
Celebrity Series of Boston
Chan Centre for the Performing Arts
Charlotte Ballet
Children's Theatre Company
Cincinnati Playhouse in the Park
Colorado Symphony
Dance Theatre of Harlem
Detroit Symphony Orchestra
Dorset Theatre Festival
Ensemble Theatre Cincinnati
First Stage
Gibney Dance
Goodman Theatre
Hancher Auditorium — The University of Iowa
Huntington Theatre Company
Jazz at Lincoln Center
Lincoln Center for the Performing Arts
Marin Theatre Company
Miller Theatre at Columbia University
Mondavi Center for the Performing Arts
Monmouth University Center for the Arts
New Jersey Symphony Orchestra
New World Symphony
New York City Ballet
Pacific Northwest Ballet
Pacific Symphony
Phoenix Theatre
Purdue Convocations
Royal Manitoba Theatre Centre
San Francisco Ballet
Seattle Repertory Theatre
Signature Theatre
South Coast Repertory
Stamford Symphony
Steppenwolf Theatre Company
Symphony of Northwest Arkansas (SoNA)
The Children's Theatre of Cincinnati
The John F. Kennedy Center for the Performing Arts
The Mann Center for the Performing Arts
The National Ballet of Canada
The New 42nd Street
The Phoenix Symphony
Two River Theater
UMass Amherst Fine Arts Center
UMS
Virginia Arts Festival
Walton Arts Center
Westport Country Playhouse
Winspear Centre
Wolf Trap Foundation for the Performing Arts

Notes

1. These results may be biased by the fact that the survey was administered online.
2. Godin, Seth. Permission Marketing: Turning Strangers into Friends, and Friends into Customers. New York: Simon & Schuster, 1999.
3. VentureBeat. “Not just alive and kicking, but your number-one marketing channel.” November 4, 2016. https://venturebeat.com/2016/11/04/not-just-alive-and-kicking-but-your-number-one-marketing-channel-vb-live/
4. Audience members who don’t use the internet would not have been able to complete the survey, so these results may not tell the full story.
5. 72% of respondents tune into either cable, broadcast, and satellite at least once a week, though viewership is heavily skewed towards older generations (see Figure 4).
6. Google/Ipsos, The Arts & Theater Ticket Purchaser. June 2014
7. Marketing Land. “Retailers Using Product Videos Report Much Higher AOV, Conversion Rates.” January 7, 2015. https://marketingland.com/retailers-using-product-videos-report-much-higher-aov-conversion-rates-113436
8. Google AdWords Blog. “Build for the next moment.” May 5, 2015. https://adwords.googleblog.com/2015/05/building-for-next-moment.html

   TechCrunch. “Mobile internet use passes desktop for the first time, study finds.” November 1, 2016. https://techcrunch.com/2016/11/01/mobile-internet-use-passes-desktop-for-the-first-time-study-finds/
9. Google Webmaster Central Blog. “Mobile-first Indexing.” November 4, 2016. https://webmasters.googleblog.com/2016/11/mobile-first-indexing.html

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10. These results may be biased by the fact that the survey was administered online.

Performing Arts Ticket Buyer — Media Usage Study
Report Prepared by WolfBrown and Capacity Interactive

WolfBrown

WolfBrown is a leading provider of market research, consulting and evaluation services to cultural organizations and philanthropic foundations in the US, UK and Australia. At the heart of our work is the belief that every human being has a unique creative voice of intrinsic worth and that every community has a responsibility to awaken, nurture, and sustain its cultural capital. The guiding philosophy of our work is engagement – engaging nonprofit leadership, their funders, and stakeholders in honest discussions about effectiveness and value, engaging audiences and visitors in deeper and more meaningful experiences, and engaging whole communities in the bold act of envisioning their future.

Performing arts organizations that are interested in participating in future studies of this sort are invited to contact WolfBrown at info@wolfbrown.com

www.wolfbrown.com

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Capacity Interactive

Capacity Interactive is the premier digital marketing consulting firm for culture and the arts. Founded in 2008 by Erik Gensler, Capacity Interactive partners with leading arts and cultural organizations in the U.S. and internationally to help them build audiences, engage community and market smarter. Practice areas include digital strategy, web analytics, A/B testing, search engine optimization, search engine marketing, social and display advertising, and email strategy.

Capacity Interactive has a strong focus on education for our clients and in the arts and cultural sector. CI hosts Digital Marketing Boot Camp for the Arts, an annual conference in New York City, and Capacity Classroom, a series of webinars and small group workshops where arts marketers can strengthen their digital skills.

Check out our podcast, CI to Eye, on iTunes, SoundCloud, and Google Play.

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