Thank you for inviting us to share data! We at IMPACTS hope that you will take time to consider the findings, discuss them, and use them as tools to help drive your organization forward in achieving your mission.

If you are interested in a deeper dive on these topics or others, please contact Bethany Gotschall at bcgotschall@impactsresearch.com.

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Engaging New Audiences:
The Research on Barriers to Attending and Returning to Arts Organizations in Washington

ArtsFund
1 March 2023

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Colleen Dilenschneider

Co-Founder
IMPACTS Experience

"Do what you love. Know your own bone. Gnaw at it, bury it, unearth it, and gnaw at it still.

– Henry David Thoreau

Bethany Corriveau Gotschall

Content Strategist
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We specialize in market research for cultural organizations, helping them understand perceptions, behaviors, barriers, and motivations.

Where will the information come from?

Monitoring individual entities

IMPACTS monitors behaviors and perceptions related to 224 visitor-serving organizations in the US on an ongoing basis.

National Awareness, Attitudes and Usage Study

Believed to be the largest in-market study regarding perceptions and behaviors to visitor-serving entities in the US. 233,400 respondents through February 2023.

IMPACTS partners

Additional research is enabled by our partners, supporters, and funders, including:

Caltech | Monterey Bay Aquarium | Stanford | the David & Lucile Packard Foundation

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Exhibit-based

US composite (*n*=190,221)
Washington State (*n*=5,321)

- Parks
- Botanic gardens
- Art museums/galleries/centers
- Science museums/centers
- History museums/sites
- Aquariums
- Zoos

Performance-based

US composite (*n*=43,179)
Washington State (*n*=1,460)

- Live theater
- Orchestras/symphonies
- Other live music
- Other performing arts

Total US composite (*n*=233,400)
Total WA State (*n*=6,781)

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The pandemic has changed how people **want and expect to engage** with cultural entities.

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One of the most pressing questions is:

We'll cover:

The need to expand audiences in Washington State, and the urgency of this need

The most financially effective and efficient way to expand audiences, according to research

The top barriers to activating inactive visitors in Washington State for exhibit and performance-based organizations

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How urgent is the need to expand audiences in Washington State?

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Current visitor substitution ratio

EOY 2022

Less in + More out = **Shrinking visitor base**

(NEGATIVE SUBSTITUTION)

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Current visitor substitution ratio
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Current visitor substitution ratio
EOY 2022

Less in + More out = **Shrinking visitor base**

(NEGATIVE SUBSTITUTION)

What is the most effective way to expand audiences?

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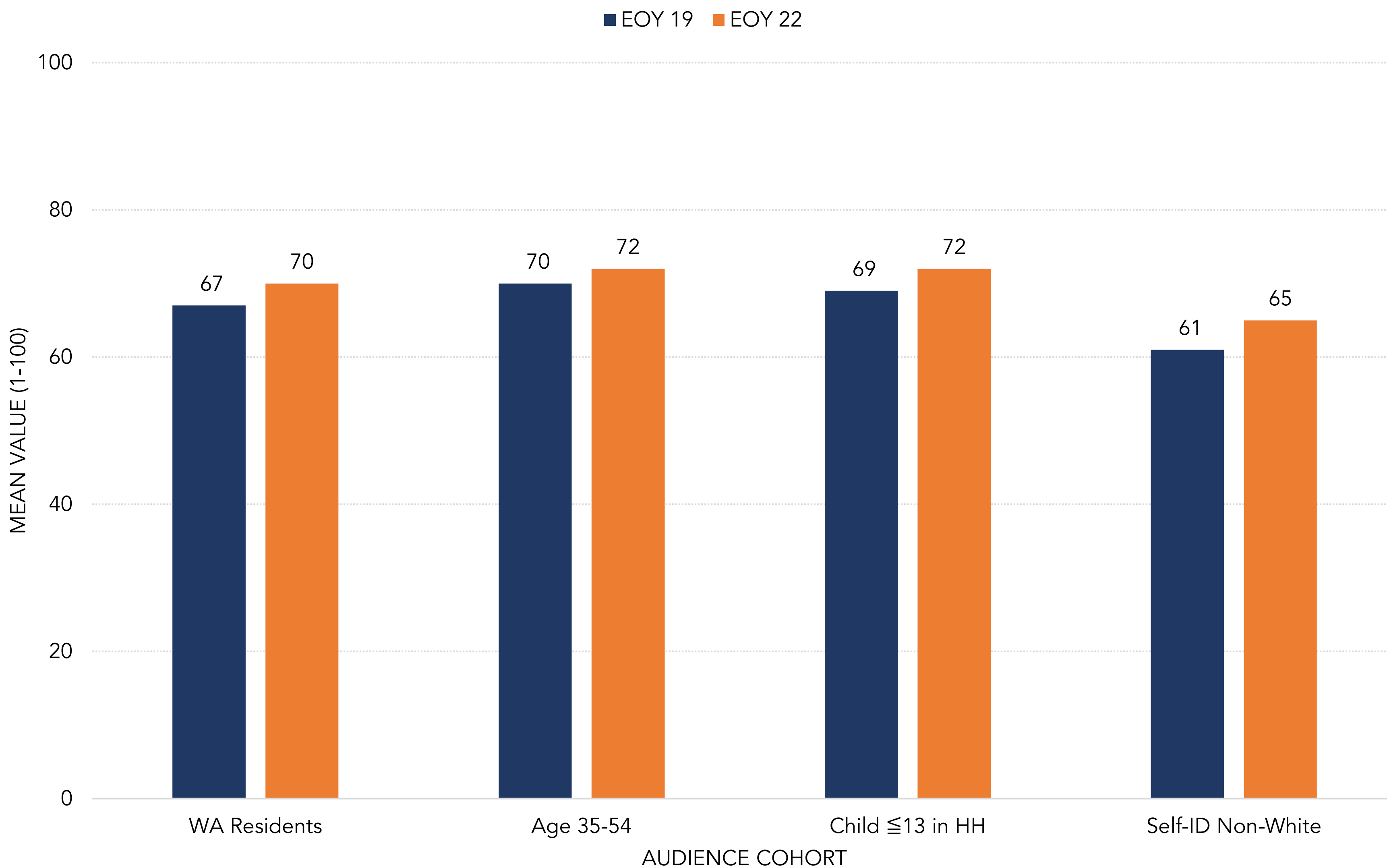
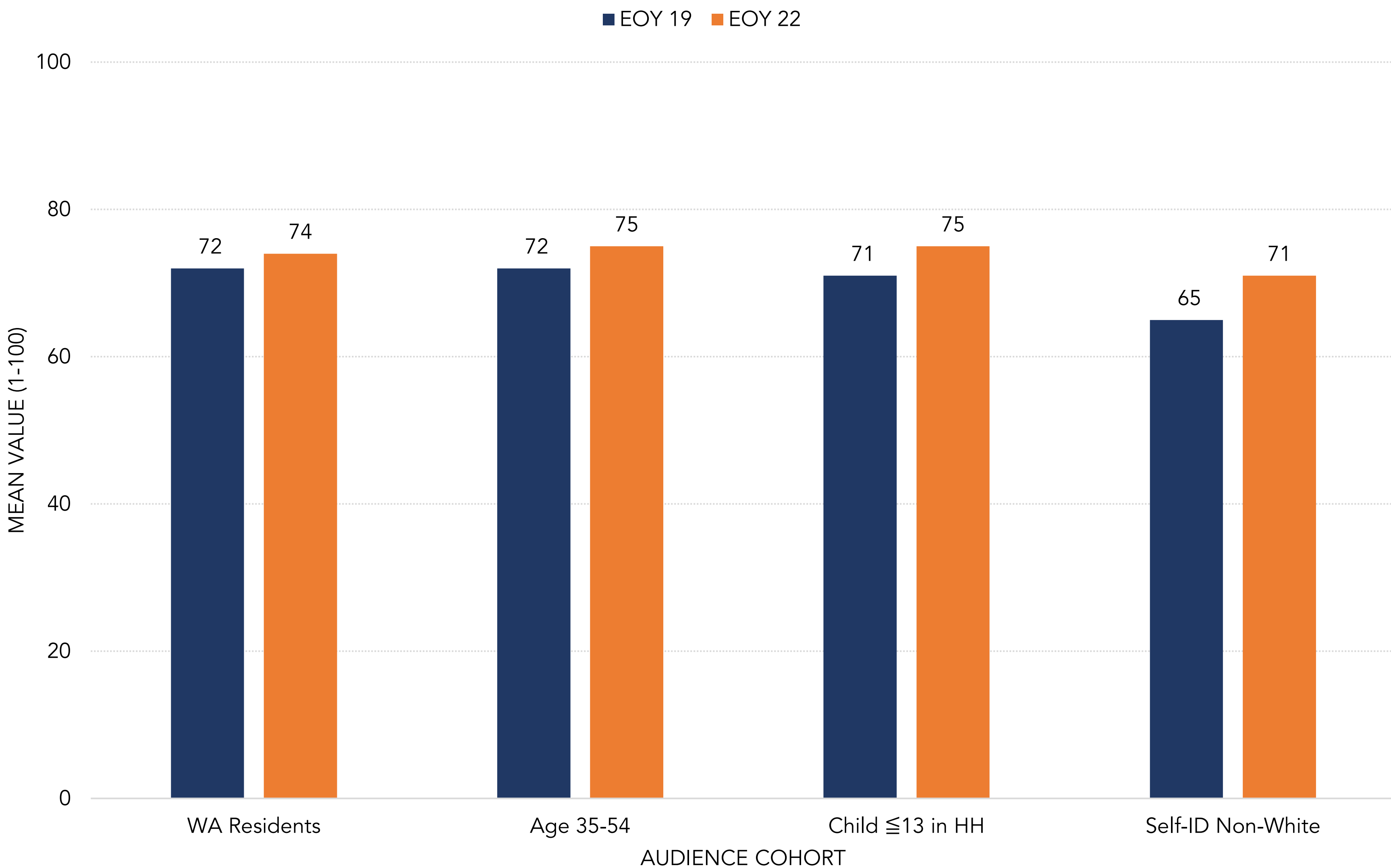
Perception of **exhibit-based organizations** as "welcoming to people like me"

WA residents



Perception of **exhibit-based organizations** as "asset to the community"

WA residents



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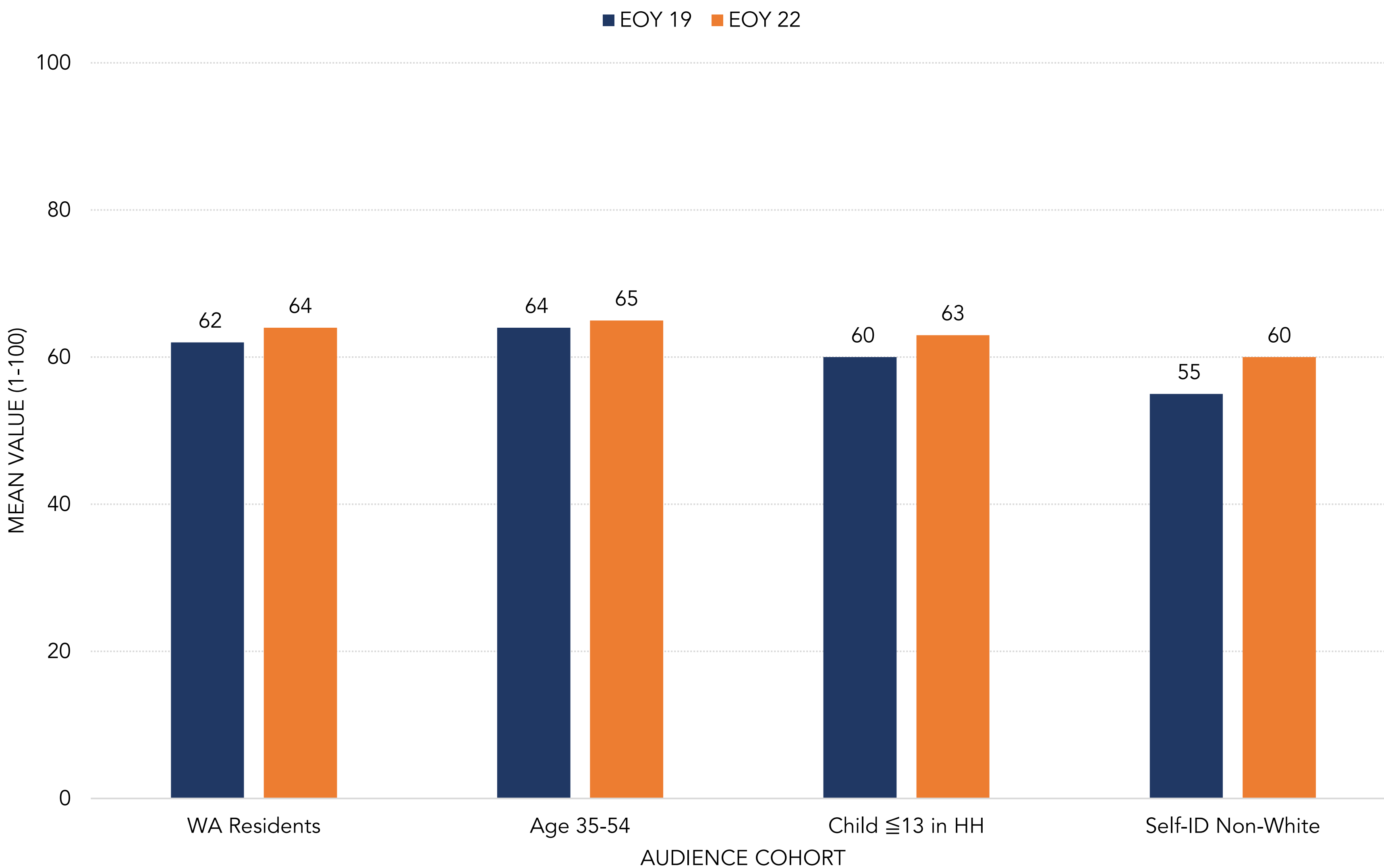
Perception of performance-based organizations as “welcoming to people like me”

WA residents



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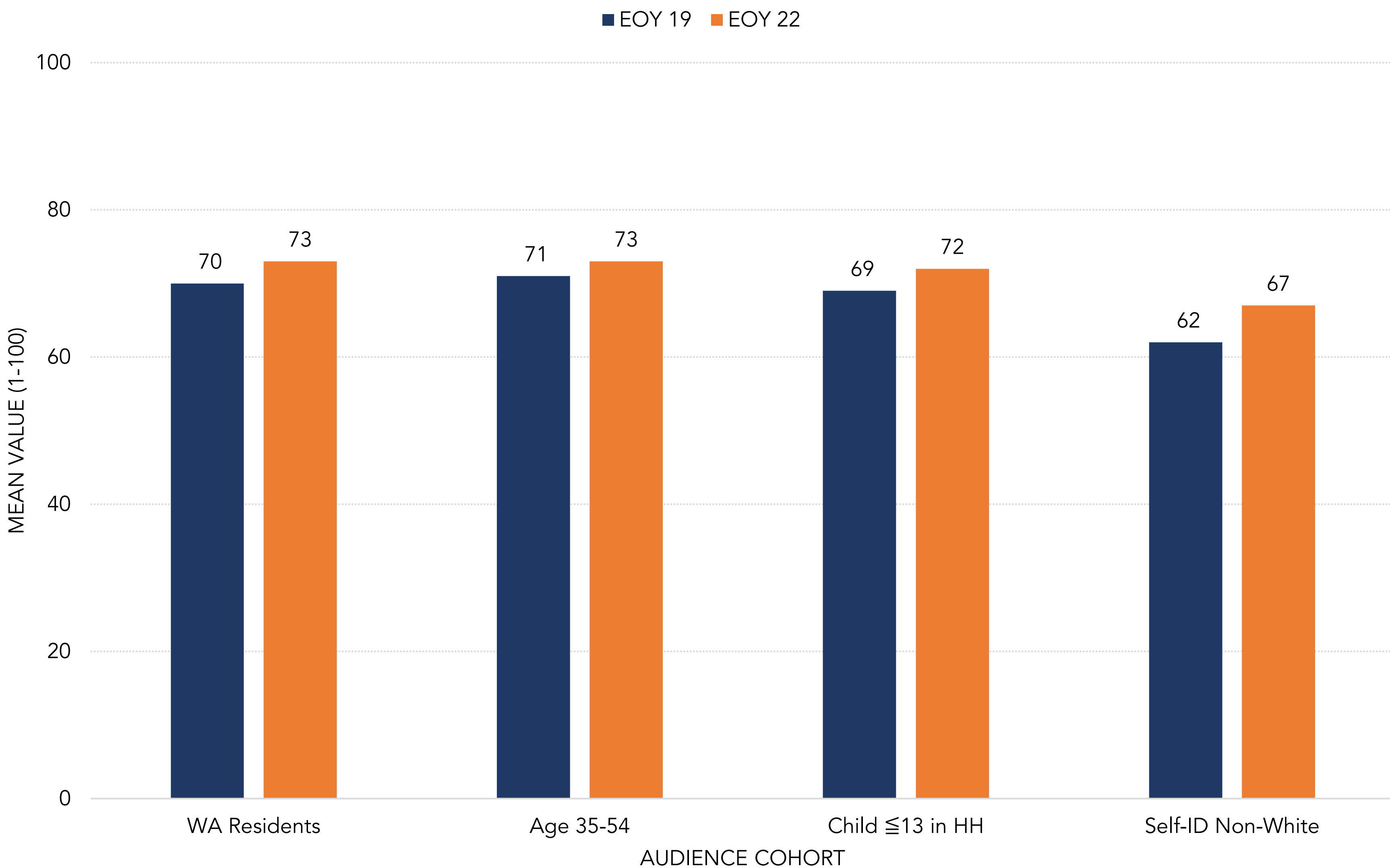
Perception of **performance-based organizations** as "asset to the community"

WA residents



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A key to realizing **market potential** and engaging **new audiences?**

*Activating **inactive visitors.***

Inactive visitors have the demographic, psychographic or behavioral attributes to suggest interest in attending a cultural organization but have not attended in the last three years.

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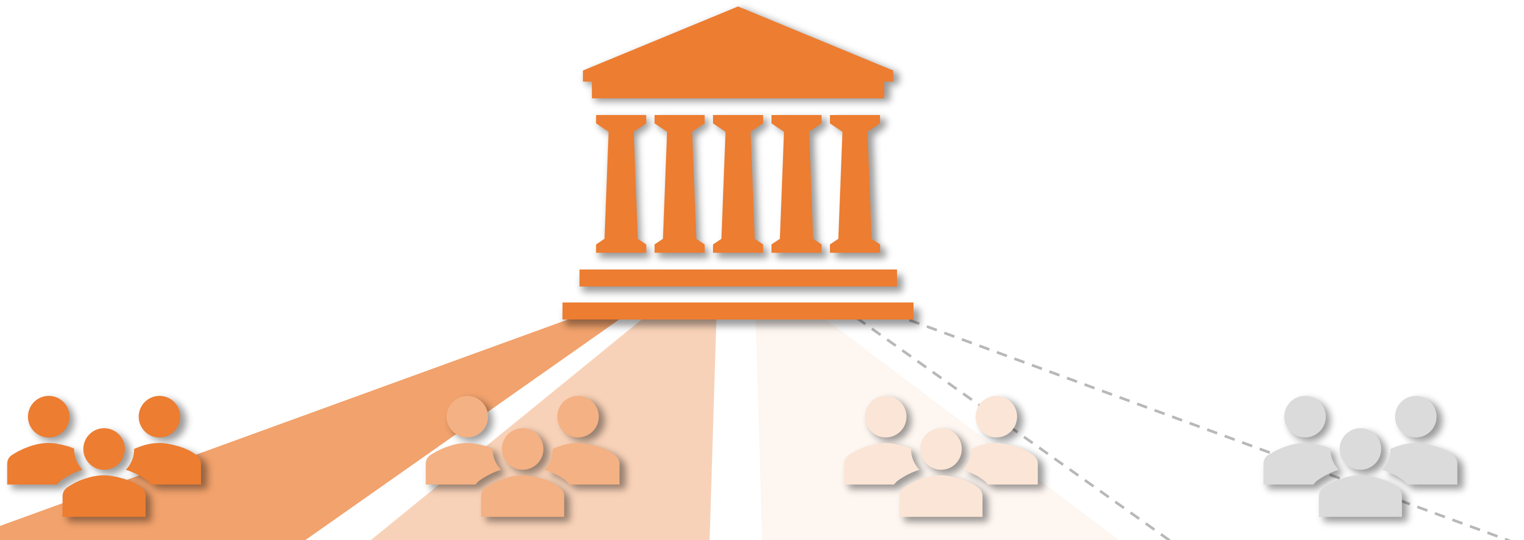
Visitor and non-visitor cohorts for cultural organizations

US residents, EOY 2022



Active Visitors	Inactive Visitors	Unlikely Visitors	Non-visitors
People who attend. They inform the profile for likely visitor demographics, psychographics, and behaviors.	People who have the psychographic and behavioral likelihood to attend, or have expressed interest in attending, but have not attended.	People who need an incentive to attend. They generally do not choose to attend without direct motivation.	People who are not interested in attending cultural organizations and do not attend.
18%	21%	31%	30%

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Visitor and non-visitor cohorts for cultural organizations

WA residents, EOY 2022

Active Visitors

People who attend. They inform the profile for likely visitor demographics, psychographics, and behaviors.

15%

Inactive Visitors

People who have the psychographic and behavioral likelihood to attend, or have expressed interest in attending, but have not attended.

22%

Unlikely Visitors

People who need an incentive to attend. They generally do not choose to attend without direct motivation.

32%

Non-visitors

People who are not interested in attending cultural organizations and do not attend.

31%

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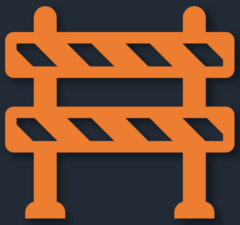
How can organizations engage inactive visitors?

Understand **barriers to attendance,** and work to strategically alleviate those barriers.



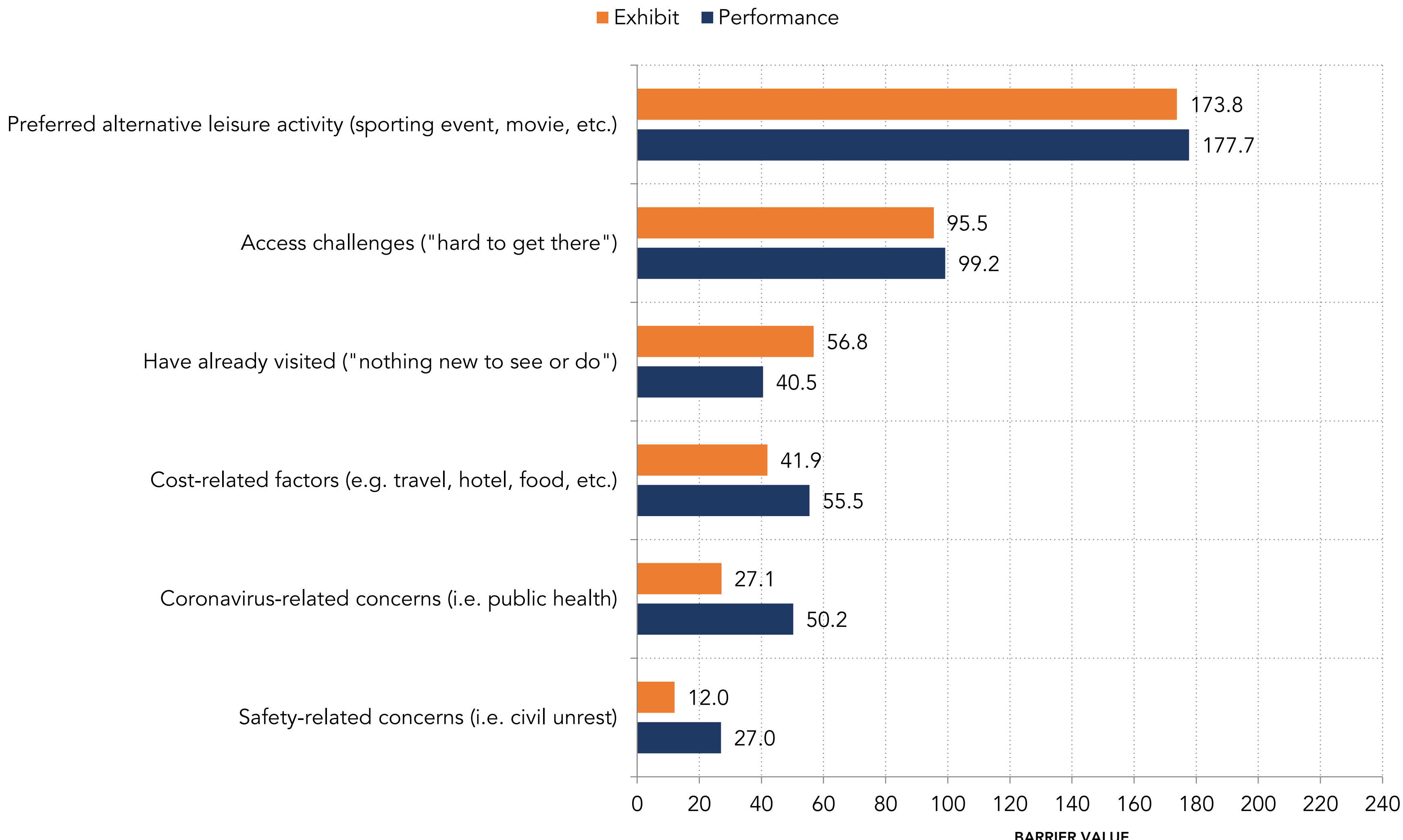
What are the top barriers to activating inactive visitors in Washington State?

"Given your interest in attending the [cultural organization], **why haven't you attended?"**

Barriers to visitation for high-propensity visitors

WA residents, exhibit vs. performance-based organization EOY 2022 comparison

Given your interest in visiting a [cultural organization], why haven't you visited within the past three years?



Top barriers to engaging interested individuals:

Prefer alternative leisure activity
(#1 for exhibit & performance)

Access challenges
(#2 for exhibit & performance)

Have already visited
(#3 for exhibit, #5 for performance)

Cost-related factors
(#4 for exhibit, #3 for performance)

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Notable **changes** since the start of the year:

*Increase in **preferring alternative leisure activities.***

*Decrease in **coronavirus-related concerns.***

Top barriers to engaging interested individuals:

Prefer alternative leisure activity
(#1 for exhibit & performance)

Access challenges
(#2 for exhibit & performance)

Have already visited
(#3 for exhibit, #5 for performance)

Cost-related factors
(#4 for exhibit, #3 for performance)

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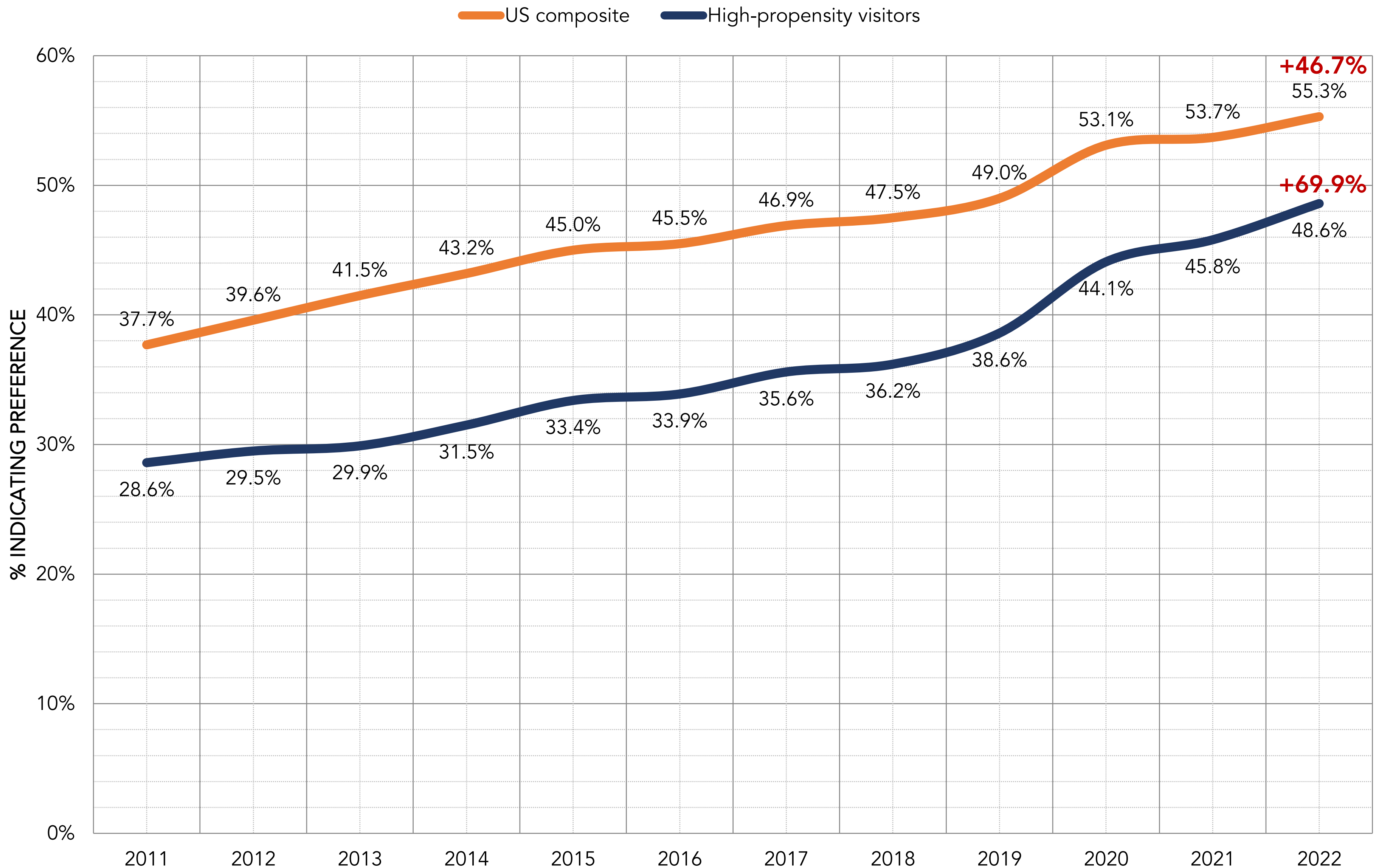
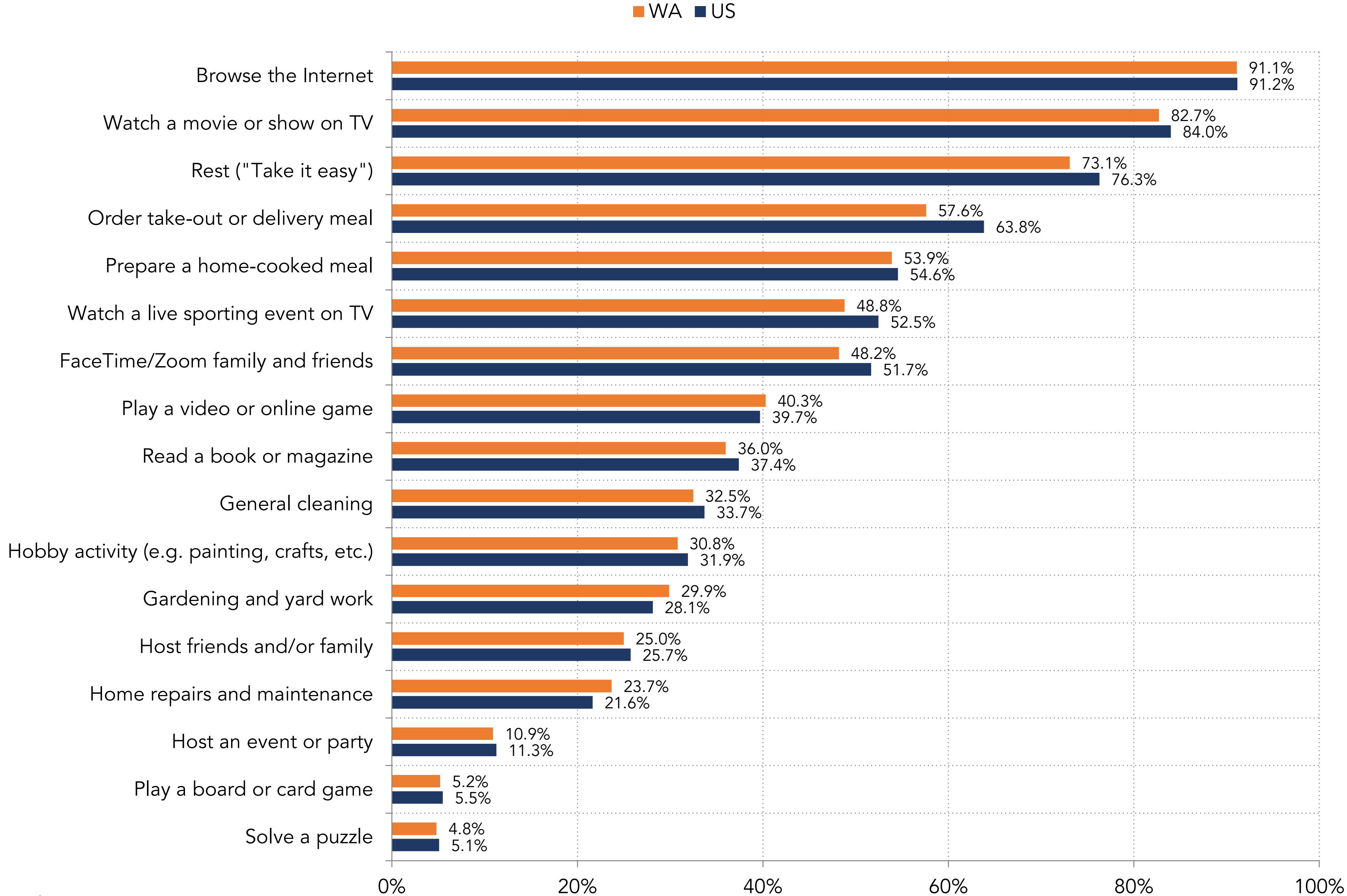
"Stay home" during weekend preference
EOY 2022



Home-based activities

Among respondents preferring to stay home, EOY 2022, WA and US comparison



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The couch is a growing competitor.

But even at home, people are **still connected.**

91% say they browse the Internet
when they stay home for the weekend.

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Barrier: Prefer an alternative leisure activity

Strategic solution: ***meet audiences where they are.***

Top barriers to engaging interested individuals:

Prefer alternative leisure activity
(#1 for exhibit & performance)

Access challenges
(#2 for exhibit & performance)

Have already visited
(#3 for exhibit, #5 for performance)

Cost-related factors
(#4 for exhibit, #3 for performance)

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Perceived access challenges for **exhibit-based** organizations

WA residents, lexical analysis of perceived complaints by descending frequency of mention

EOY 2019	DESCRIPTION	Q2 2022
122.2	Hard to get there/travel distance	125.0
40.5	Hard to purchase/transact	97.5
32.6	Hard to plan	74.8
31.9	Not responsive to inquiries/requests	44.2
20.5	Non-compliant building or experience	22.0

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Perceived access challenges for **performance-based** organizations

WA residents, lexical analysis of perceived complaints by descending frequency of mention

EOY 2019	DESCRIPTION	Q2 2022
130.3	Hard to get there/travel distance	133.2
49.2	Hard to purchase/transact	79.7
45.7	Not responsive to inquiries/requests	65.2
28.7	Hard to plan	52.5
26.9	Non-compliant building or experience	26.2

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Perceived access challenges for cultural organizations

WA residents, lexical analysis of perceived complaints by descending frequency of mention, EOY 2022

EXHIBIT	DESCRIPTION	PERFORMANCE
125.0	Hard to get there/travel distance	133.2
97.5	Hard to purchase/transact	79.7
44.2	Not responsive to inquiries/requests	65.2
74.8	Hard to plan	52.5
22.0	Non-compliant building or experience	26.2

Barrier: Access challenges ("the hassle")

Strategic solution: ***Work to alleviate perceptions related to top challenges.***

Top barriers to engaging interested individuals:

Prefer alternative leisure activity
(#1 for exhibit & performance)

Access challenges
(#2 for exhibit & performance)

Have already visited
(#3 for exhibit, #5 for performance)

Cost-related factors
(#4 for exhibit, #3 for performance)

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What does **"nothing new to do or see"** mean?

I know the story.
Been there, done that.

OR…

What's new there?*

* Motivated only if there is a special program or exhibit
* Often tied to a "special" program/exhibit cycle

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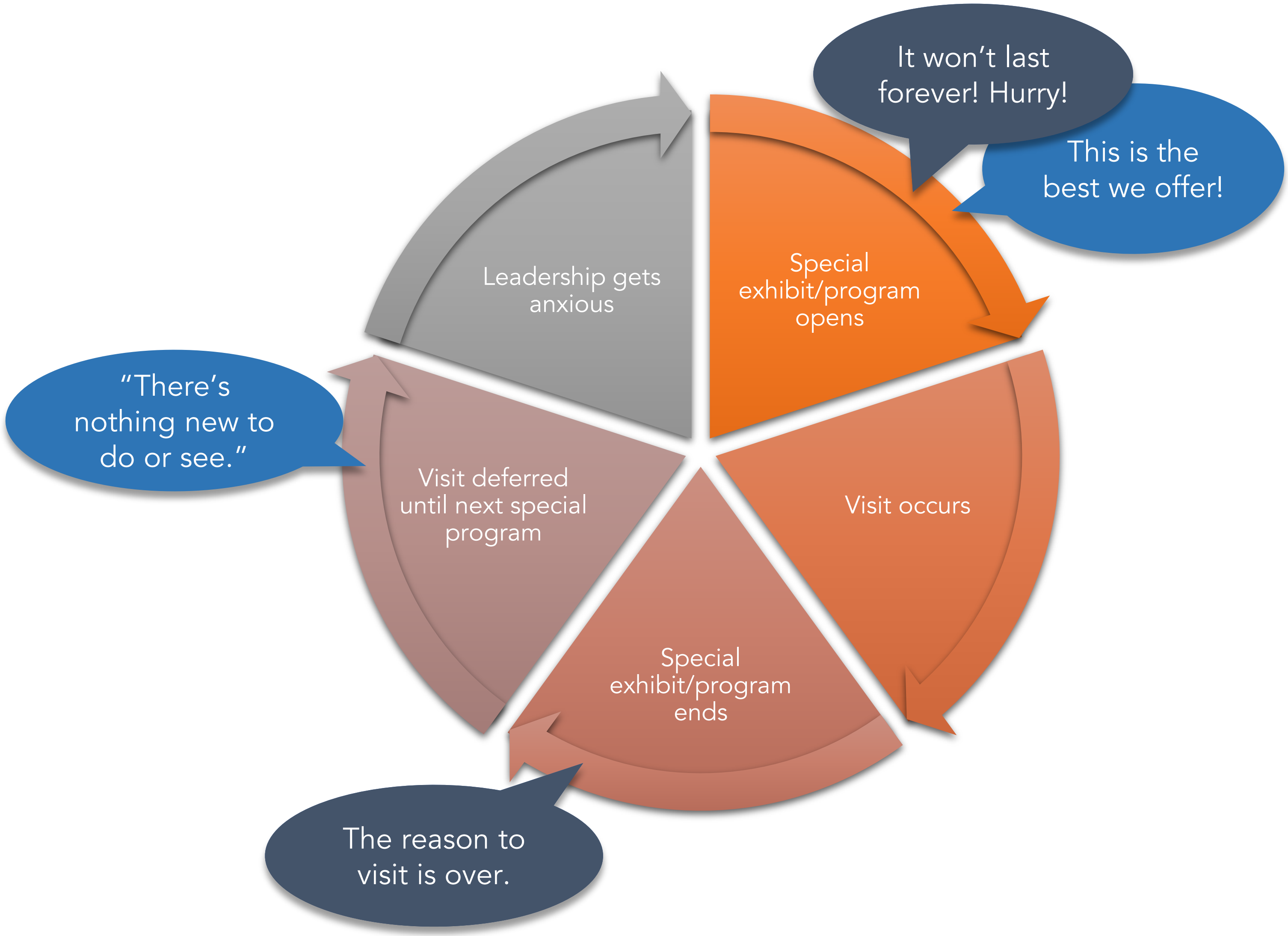
Special exhibits/programs cycle



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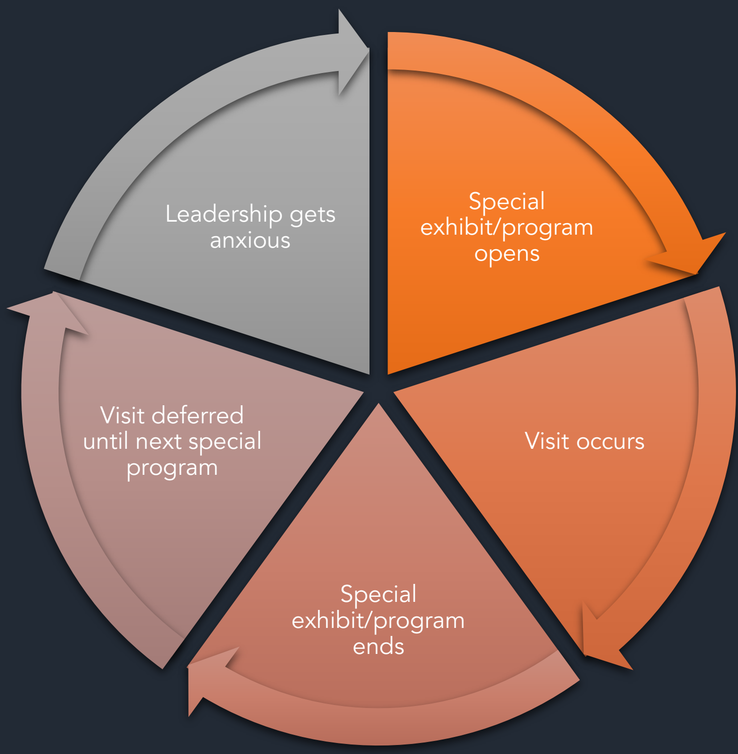
Special exhibits/programs cycle



- Cycle grows over time
- Born of tying positive reputational equities (relevant, unique experience, special, expert, etc.) to something temporary rather than permanent
- Often applies to programs and events as well as exhibits

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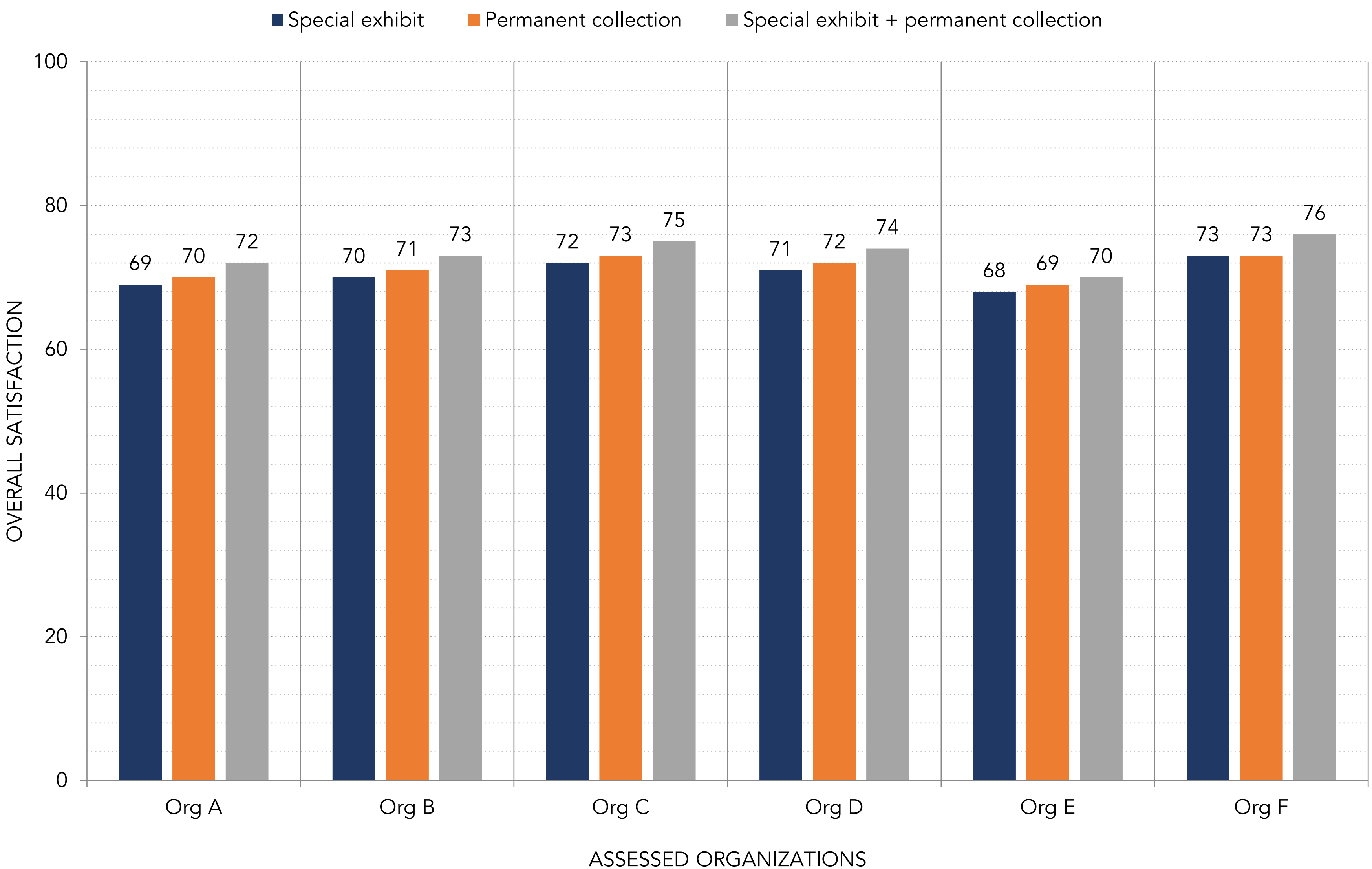
Overall satisfaction by onsite experience



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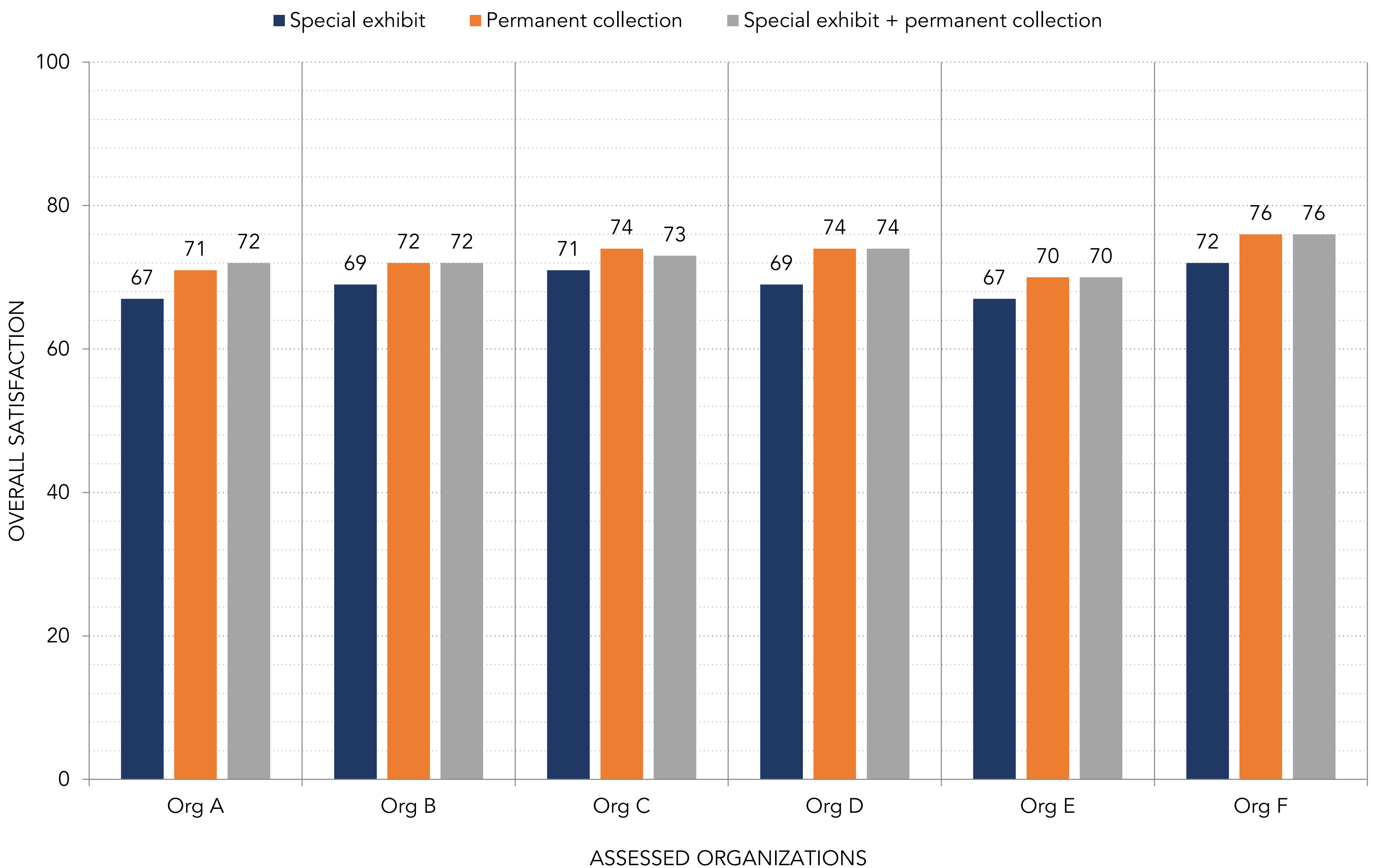
Value for cost by onsite experience



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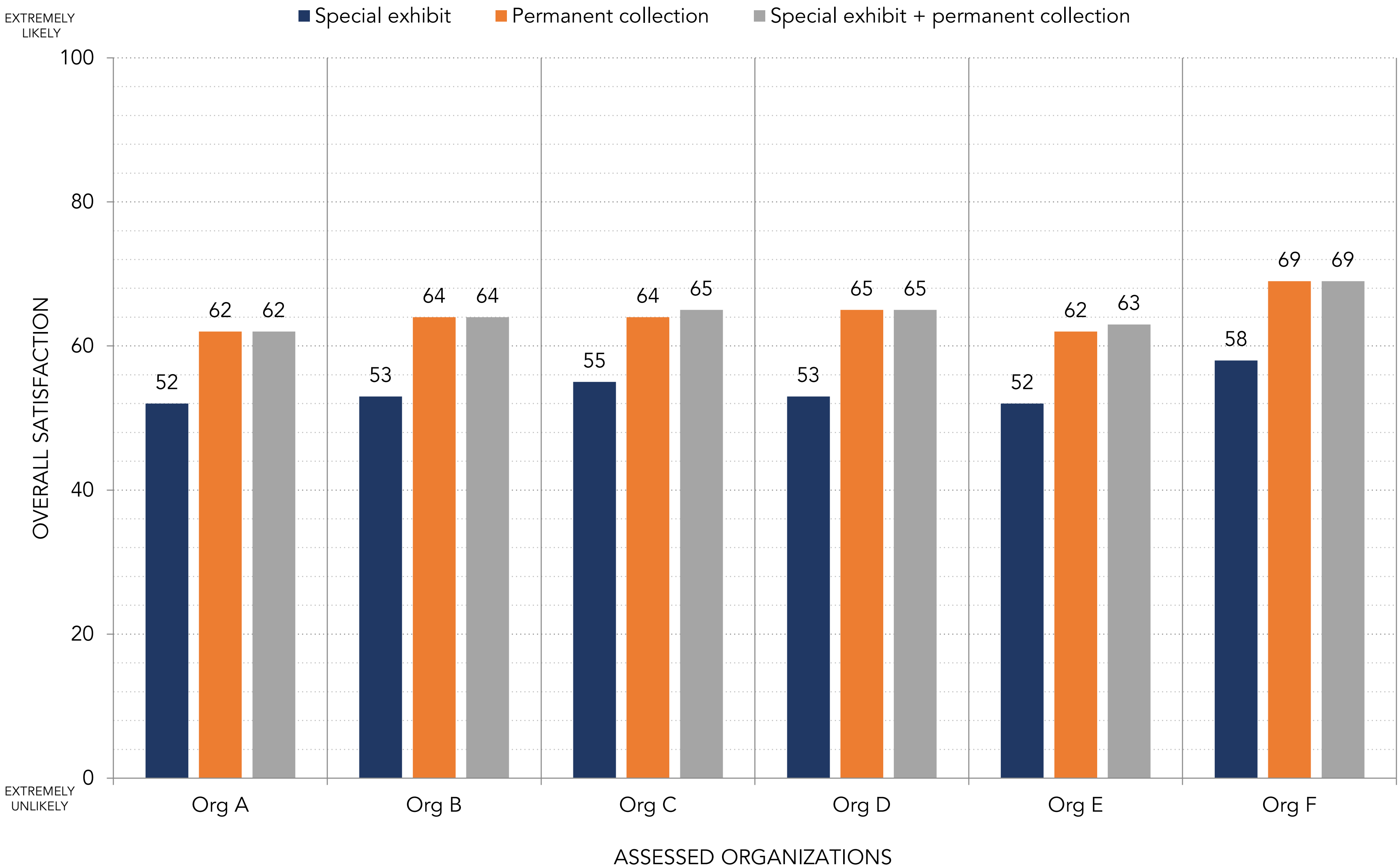
Intent to revisit within one year by onsite experience



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Barrier: "Nothing new to do or see"

Strategic solution: ***Show organizations are reliably relevant and engaging.***

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Top barriers to engaging interested individuals:

Prefer alternative leisure activity
(#1 for exhibit & performance)

Access challenges
(#2 for exhibit & performance)

Have already visited
(#3 for exhibit, #5 for performance)

Cost-related factors
(#4 for exhibit, #3 for performance)

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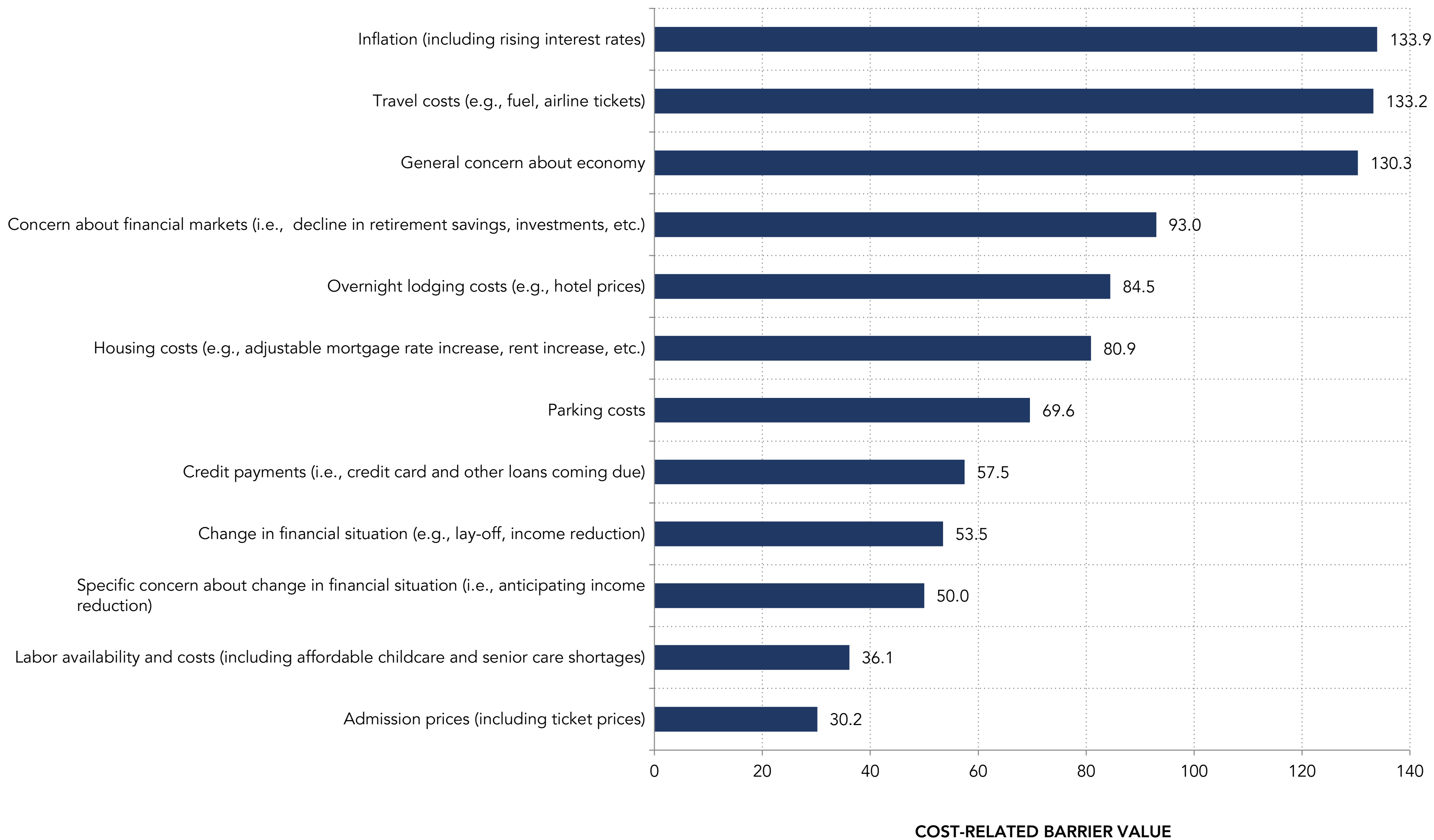
Cost-related barriers to visitation for high-propensity visitors

WA high-propensity visitors citing "cost-related" barriers, EOY 2022



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Barrier: Cost-related factors

Strategic solution:

Respond to economic perceptions – do not react to them.

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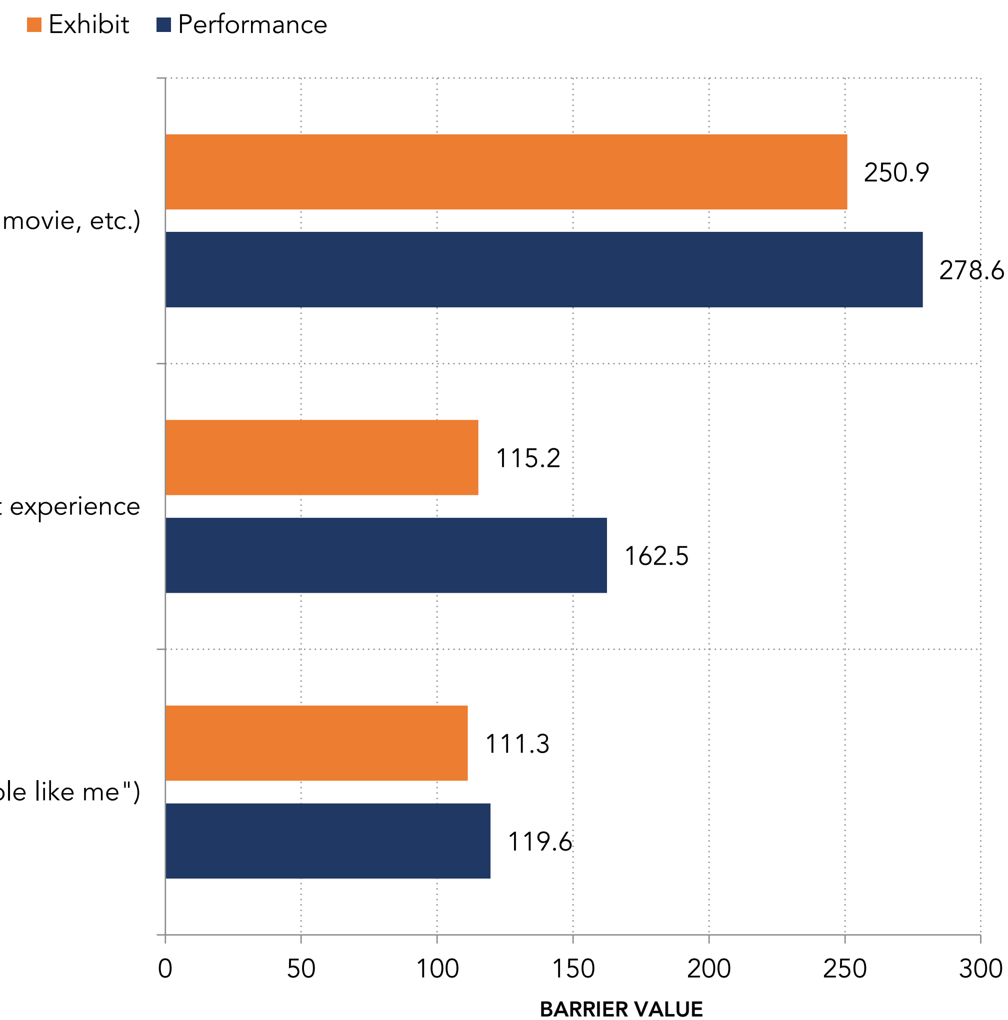
What about unlikely visitors? Why aren't they interested in attending?

Barriers to visitation for unlikely visitors

WA residents, EOY 2022

Why do you describe yourself as "unlikely"
to visit a [cultural] organization in the next two years?



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Top barriers to engaging unlikely visitors:

- Preferring an alternative leisure activity/not interested
- Negative precedent experience
- Attitude affinity perceptions ("not for people like me")

Strategies to engage unlikely visitors:

- Work to increase and maintain ongoing relevance
- Yesterday's programs inform today's attendance, today's programs impact tomorrow's attendance
- Activate inactive visitors and prioritize DEIJ efforts

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The perception of cultural organizations in Washington State **has fundamentally shifted** during the pandemic.

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Attitudes and perceptions

WA high-propensity visitors, lexical analysis by descending frequency of mention

"How would you describe the [CULTURAL ORGANIZATION] to a friend?"

EOY 2019	RANK	EOY 2022
Good place to take kids	1	Must-see
Good place to visit	2	Fun for families
Must-see	3	Good place to visit
Good for families	4	Good place to take kids
Good place to take visitors (friends and family)	5	Immersive
Fun	6	Important
Boring	7	Great for a date
Good for a date	8	Educational
Good for school/class trips	9	"Worth it"
Educational	10	Good place to take visitors (friends and family)

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Keep up **the good work!**

Inactive visitors make up **22%** of Washington State residents. Working to alleviate barriers increases attendance and is a key to broadening your audience.

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Contact
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