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.

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

www.impacts-experience.com
Engaging New Audiences: The Research on Barriers to Attending and Returning to Arts Organizations in Washington

ArtsFund
1 March 2023
“Do what you love. Know your own bone. Gnaw at it, bury it, unearth it, and gnaw at it still.

– Henry David Thoreau
We specialize in market research for cultural organizations, helping them understand perceptions, behaviors, barriers, and motivations.
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 and Lucile Packard Foundation
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 \( (n=6,781) \)
The pandemic has changed how people want and expect to engage with cultural entities.
One of the most pressing questions is:

How can we reengage and expand our audiences?
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
How urgent is the need to expand audiences in Washington State?
Less in + More out = **Shrinking visitor base**
(NEGATIVE SUBSTITUTION)
Current visitor substitution ratio
EOY 2022

ENTER 0.967
BIRTH
RELOCATION
IMMIGRATION

WA exhibit-based organizations

EXIT 1.000
DEATH
RELOCATION
MIGRATION

Less in + More out = Shrinking visitor base
(NEGATIVE SUBSTITUTION)
Current visitor substitution ratio
EOY 2022

Less in + More out = Shrinking visitor base
(NEGATIVE SUBSTITUTION)
Less in + More out = Shrinking visitor base
(NEGATIVE SUBSTITUTION)
What is the most effective way to expand audiences?
Perception of exhibit-based organizations as “welcoming to people like me”

WA residents

<table>
<thead>
<tr>
<th>AUDIENCE COHORT</th>
<th>EOY 19</th>
<th>EOY 22</th>
</tr>
</thead>
<tbody>
<tr>
<td>WA Residents</td>
<td>67</td>
<td>70</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>70</td>
<td>72</td>
</tr>
<tr>
<td>Child ≤13 in HH</td>
<td>69</td>
<td>72</td>
</tr>
<tr>
<td>Self-ID Non-White</td>
<td>61</td>
<td>65</td>
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</table>
Perception of exhibit-based organizations as “asset to the community”

WA residents

<table>
<thead>
<tr>
<th>AUDIENCE COHORT</th>
<th>MEAN VALUE (1-100)</th>
</tr>
</thead>
<tbody>
<tr>
<td>WA Residents</td>
<td>EOY 19: 72</td>
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<tr>
<td></td>
<td>EOY 22: 74</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>EOY 19: 72</td>
</tr>
<tr>
<td></td>
<td>EOY 22: 75</td>
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<tr>
<td>Child ≤13 in HH</td>
<td>EOY 19: 71</td>
</tr>
<tr>
<td></td>
<td>EOY 22: 75</td>
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Perception of performance-based organizations as “welcoming to people like me”

WA residents

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<tbody>
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</tr>
<tr>
<td>Age 35-54</td>
<td>EOY 19: 64, EOY 22: 65</td>
</tr>
<tr>
<td>Child ≤13 in HH</td>
<td>EOY 19: 60, EOY 22: 63</td>
</tr>
<tr>
<td>Self-ID Non-White</td>
<td>EOY 19: 55, EOY 22: 60</td>
</tr>
</tbody>
</table>
Perception of performance-based organizations as “asset to the community” WA residents

<table>
<thead>
<tr>
<th>AUDIENCE COHORT</th>
<th>EOY 19</th>
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<td>72</td>
</tr>
<tr>
<td>Self-ID Non-White</td>
<td>62</td>
<td>67</td>
</tr>
</tbody>
</table>
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.
Visitor and non-visitor cohorts for cultural organizations
US residents, EOY 2022

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

15% 22% 32% 31%
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?”
Given your interest in visiting a [cultural organization], why haven’t you visited within the past three years?

<table>
<thead>
<tr>
<th>Preference</th>
<th>Exhibit</th>
<th>Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred alternative leisure activity</td>
<td>173.8</td>
<td>177.7</td>
</tr>
<tr>
<td>Access challenges (&quot;hard to get there&quot;)</td>
<td>95.5</td>
<td>99.2</td>
</tr>
<tr>
<td>Have already visited (&quot;nothing new to see or do&quot;)</td>
<td>56.8</td>
<td>40.5</td>
</tr>
<tr>
<td>Cost-related factors (e.g. travel, hotel, food, etc.)</td>
<td>41.9</td>
<td>55.5</td>
</tr>
<tr>
<td>Coronavirus-related concerns (i.e. public health)</td>
<td>27.1</td>
<td>50.2</td>
</tr>
<tr>
<td>Safety-related concerns (i.e. civil unrest)</td>
<td>12.0</td>
<td>27.0</td>
</tr>
</tbody>
</table>
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)
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:

1. Prefer alternative leisure activity (#1 for exhibit & performance)
2. Access challenges (#2 for exhibit & performance)
3. Have already visited (#3 for exhibit, #5 for performance)
4. Cost-related factors (#4 for exhibit, #3 for performance)
“Stay home” during weekend preference
EOY 2022

% INDICATING PREFERENCE


US composite
High-propensity visitors

+46.7%
+69.9%
Home-based activities
Among respondents preferring to stay home, EOY 2022, WA and US comparison

- Browse the Internet: WA 91.1%, US 91.2%
- Watch a movie or show on TV: WA 82.7%, US 84.0%
- Rest (“Take it easy”): WA 73.1%, US 76.3%
- Order take-out or delivery meal: WA 57.6%, US 63.8%
- Prepare a home-cooked meal: WA 53.9%, US 54.6%
- Watch a live sporting event on TV: WA 48.8%, US 52.5%
- FaceTime/Zoom family and friends: WA 48.2%, US 51.7%
- Play a video or online game: WA 40.3%, US 39.7%
- Read a book or magazine: WA 36.0%, US 37.4%
- General cleaning: WA 32.5%, US 33.7%
- Hobby activity (e.g. painting, crafts, etc.): WA 30.8%, US 31.9%
- Gardening and yard work: WA 29.9%, US 28.1%
- Host friends and/or family: WA 25.0%, US 25.7%
- Home repairs and maintenance: WA 23.7%, US 21.6%
- Host an event or party: WA 10.9%, US 11.3%
- Play a board or card game: WA 5.2%, US 5.5%
- Solve a puzzle: WA 4.8%, US 5.1%
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.
**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)
Perceived access challenges for exhibit-based organizations
WA residents, lexical analysis of perceived complaints by descending frequency of mention

<table>
<thead>
<tr>
<th>EOY 2019</th>
<th>DESCRIPTION</th>
<th>Q2 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>122.2</td>
<td>Hard to get there/travel distance</td>
<td>125.0</td>
</tr>
<tr>
<td>40.5</td>
<td>Hard to purchase/transact</td>
<td>97.5</td>
</tr>
<tr>
<td>32.6</td>
<td>Hard to plan</td>
<td>74.8</td>
</tr>
<tr>
<td>31.9</td>
<td>Not responsive to inquiries/requests</td>
<td>44.2</td>
</tr>
<tr>
<td>20.5</td>
<td>Non-compliant building or experience</td>
<td>22.0</td>
</tr>
</tbody>
</table>
Perceived access challenges for **performance-based** organizations
WA residents, lexical analysis of perceived complaints by descending frequency of mention

<table>
<thead>
<tr>
<th>EOY 2019</th>
<th>DESCRIPTION</th>
<th>Q2 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>130.3</td>
<td>Hard to get there/travel distance</td>
<td>133.2</td>
</tr>
<tr>
<td>49.2</td>
<td>Hard to purchase/transact</td>
<td>79.7</td>
</tr>
<tr>
<td>45.7</td>
<td>Not responsive to inquiries/requests</td>
<td>65.2</td>
</tr>
<tr>
<td>28.7</td>
<td>Hard to plan</td>
<td>52.5</td>
</tr>
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</table>
### Perceived access challenges for cultural organizations
WA residents, lexical analysis of perceived complaints by descending frequency of mention, EOY 2022

<table>
<thead>
<tr>
<th>EXHIBIT</th>
<th>DESCRIPTION</th>
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</tr>
</thead>
<tbody>
<tr>
<td>125.0</td>
<td>Hard to get there/travel distance</td>
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<td>26.2</td>
</tr>
</tbody>
</table>
**Barrier:** Access challenges ("the hassle")

**Strategic solution:** Work to alleviate perceptions related to top challenges.
Top barriers to engaging interested individuals:

1. Prefer alternative leisure activity (#1 for exhibit & performance)
2. Access challenges (#2 for exhibit & performance)
3. Have already visited (#3 for exhibit, #5 for performance)
4. Cost-related factors (#4 for exhibit, #3 for performance)
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
Special exhibits/programs cycle

- **Leadership gets anxious**
- **Visit deferred until next special program**
- **Visit occurs**
- **Special exhibit/program ends**
- **The reason to visit is over.**
- **Special exhibit/program opens**
- **It won’t last forever! Hurry!**
- **This is the best we offer!**

“**There’s nothing new to do or see.**”
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
Overall satisfaction by onsite experience

![Graph showing overall satisfaction by onsite experience for different organizations.](image-url)
Value for cost by onsite experience

![Bar chart showing overall satisfaction for different organizations and exhibit types.](chart_image)

- **Org A**: Special exhibit = 67, Permanent collection = 71, Special exhibit + permanent collection = 72
- **Org B**: Special exhibit = 69, Permanent collection = 72, Special exhibit + permanent collection = 72
- **Org C**: Special exhibit = 71, Permanent collection = 74, Special exhibit + permanent collection = 73
- **Org D**: Special exhibit = 69, Permanent collection = 74, Special exhibit + permanent collection = 74
- **Org E**: Special exhibit = 67, Permanent collection = 70, Special exhibit + permanent collection = 70
- **Org F**: Special exhibit = 72, Permanent collection = 76, Special exhibit + permanent collection = 76
Intent to revisit within one year by onsite experience

- Extremely Likely
- Extremely Unlikely

**Organizations:** Org A, Org B, Org C, Org D, Org E, Org F

**Bars:**
- Special exhibit
- Permanent collection
- Special exhibit + permanent collection

**Overall Satisfaction Scores:**
- Org A: Special exhibit 52, Permanent collection 62, Special exhibit + permanent collection 62
- Org B: Special exhibit 53, Permanent collection 64, Special exhibit + permanent collection 64
- Org C: Special exhibit 55, Permanent collection 64, Special exhibit + permanent collection 65
- Org D: Special exhibit 53, Permanent collection 65, Special exhibit + permanent collection 65
- Org E: Special exhibit 52, Permanent collection 62, Special exhibit + permanent collection 63
- Org F: Special exhibit 58, Permanent collection 69, Special exhibit + permanent collection 69

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Barrier: “Nothing new to do or see”

Strategic solution: *Show organizations are reliably relevant and engaging.*
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)
Cost-related barriers to visitation for high-propensity visitors
WA high-propensity visitors citing “cost-related” barriers, EOY 2022

- Inflation (including rising interest rates): 133.9
- Travel costs (e.g., fuel, airline tickets): 133.2
- General concern about economy: 130.3
- Concern about financial markets (i.e., decline in retirement savings, investments, etc.): 93.0
- Overnight lodging costs (e.g., hotel prices): 84.5
- Housing costs (e.g., adjustable mortgage rate increase, rent increase, etc.): 80.9
- Parking costs: 69.6
- Credit payments (i.e., credit card and other loans coming due): 57.5
- Change in financial situation (e.g., lay-off, income reduction): 53.5
- Specific concern about change in financial situation (i.e., anticipating income reduction): 50.0
- Labor availability and costs (including affordable childcare and senior care shortages): 36.1
- Admission prices (including ticket prices): 30.2

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Barrier: Cost-related factors

Strategic solution: Respond to economic perceptions – do not react to them.
What about unlikely visitors? Why aren’t they interested in attending?
Why do you describe yourself as “unlikely” to visit a [cultural] organization in the next two years?

Barriers to visitation for unlikely visitors

- Preferred alternative leisure activity (e.g. sporting event, movie, etc.)
  - Exhibit: 250.9
  - Performance: 278.6

- Negative precedent experience
  - Exhibit: 115.2
  - Performance: 162.5

- Attitude affinity perceptions (“not for people like me”)
  - Exhibit: 111.3
  - Performance: 119.6

WA residents, EOY 2022
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
The perception of cultural organizations in Washington State has fundamentally shifted during the pandemic.
Attitudes and perceptions
WA high-propensity visitors, lexical analysis by descending frequency of mention

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

<table>
<thead>
<tr>
<th>EOY 2019</th>
<th>RANK</th>
<th>EOY 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good place to take kids</td>
<td>1</td>
<td>Must-see</td>
</tr>
<tr>
<td>Good place to visit</td>
<td>2</td>
<td>Fun for families</td>
</tr>
<tr>
<td>Must-see</td>
<td>3</td>
<td>Good place to visit</td>
</tr>
<tr>
<td>Good for families</td>
<td>4</td>
<td>Good place to take kids</td>
</tr>
<tr>
<td>Good place to take visitors (friends and family)</td>
<td>5</td>
<td>Immersive</td>
</tr>
<tr>
<td>Fun</td>
<td>6</td>
<td>Important</td>
</tr>
<tr>
<td>Boring</td>
<td>7</td>
<td>Great for a date</td>
</tr>
<tr>
<td>Good for a date</td>
<td>8</td>
<td>Educational</td>
</tr>
<tr>
<td>Good for school/class trips</td>
<td>9</td>
<td>“Worth it”</td>
</tr>
<tr>
<td>Educational</td>
<td>10</td>
<td>Good place to take visitors (friends and family)</td>
</tr>
</tbody>
</table>
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.
Contact
For all inquiries:

Bethany Corriveau Gotschall, Content Strategist
bcgotschall@impactsresearch.com