

---

Chicago Community Trust  
Excellence in Dance Initiative

# Getting in Step with Chicago Dance Audiences

## Research Findings & Key Issues for Growth

---

Presentation to the Chicago Dance Community  
November 10, 2004



SLOVER LINETT STRATEGIES

Audience research and planning  
for the mission-driven world.

Tel 773 267-3444  
2252 West Cullom Avenue  
Chicago, Illinois 60618  
mail@slstrategies.com  
www.slstrategies.com

---

---

# What we'll cover today

---

- Methodology
- Audience profile
- Key findings
- Top ways to grow dance audiences

---

# Our research methodology

---

Step 1: Literature review (Summer '03)

Step 2: Dance leader interviews (Summer '03)

Step 3: Qualitative audience research (Fall '03)

- ▶ 5 focus groups and 11 in-depth interviews with regular dance attenders

Step 4: Quantitative audience research (Winter-Spring '04)

- ▶ Telephone survey of 550 Chicago-area residents ("dance attenders" and "cultural consumers")

Step 5: Database analysis (Summer '04)

- ▶ Ticket buyers with appended demographic data

---

# How did we find participants?

---

- Organizations provided patron lists, which we combined and sampled

## **17 dance companies & presenters**

Ballet Hispanico  
Centre East  
Chicago Human Rhythm Project  
Columbia College  
Dance Chicago  
Dance Cuba  
Ensemble Español  
Gus Giordano  
Hubbard Street Dance Chicago  
Joffrey Ballet  
Link's Hall  
Lucky Plush  
Luna Negra  
Melissa Thodos & Dancers  
Muntu Dance Theater  
Museum of Contemporary Art (dance series)  
River North

## **16 other cultural organizations**

Art Institute of Chicago  
Chicago Opera Theater  
Chicago Shakespeare Theater  
Columbia College Film Center  
Court Theater  
The DuSable Museum  
The Field Museum  
The Goodman Theater  
The Lookingglass Theater  
The Mexican Fine Arts Center  
MCA (music performances)  
The Old Town School of Folk Music  
The Redmoon Theater  
Victory Gardens Theater  
The Writers' Theater  
WTTW

# What did we ask them?

- In the focus groups:

Background (childhood dance lessons, attendance)

Involvement pathway (how did you become an attender?)

Experiences at dance performances

Perceptions of dance

Decision process as attender

Benefits derived from attending dance

Responses to potential marketing tactics

- In the phone survey:

Demographics

Background (childhood dance lessons, attendance)

Purchase activity (dance attendance, other culture attendance)

Other activity (creative/artistic pursuits)

Motivators/needs in dance attendance

Preferences (marketing, purchase, experience)

Barriers to attending (more) dance

Benefits derived from attending dance

# The database rounded out the picture

- 26 presenters & companies provided ticket-buyer data to build the Dance Audience Database

## 26 dance companies & presenters

Alvin Ailey American Dance Theatre	Ballet Hispanico
Bolshoi Ballet	Centre East
The Center for Performing Arts at GSU	Chicago Tap Theatre
Chicago Human Rhythm Project	Cloud Gate
College of Du Page McAninch Arts Center	Dance Chicago
Dance Center at Columbia College	Dance Africa
Ensemble Español	Gus Giordano
Hubbard Street Dance Chicago	Hedwig Dances
Joffrey Ballet	Luna Negra
Melissa Thodos & Dancers	Muntu Dance Theater
Museum of Contemporary Art (dance series)	Performing Arts Chicago
River North Dance Company	Salt Creek Ballet
Trinity Irish Dance Company	T&J Dance Company

- Demographic information was then added to the sales data

---

---

# Audience profile

---

# Some definitions

- **Cultural consumers** (from telephone survey)
  - ▶ Say they have NOT attended a dance performance in the Chicago area in the past 12 months
  - ▶ Are medium–heavy culture "users"
  - ▶ Represent potential for new dance audiences
- **Dance attenders** (from telephone survey)
  - ▶ Say they've attended at least 1 professional dance performance in the Chicago area in the past 12 months
- **Dance database** (from database analysis)
  - ▶ Individuals on the lists of participating dance companies and presenters
- **Chicago area population**
  - ▶ From the 2000 Census, Chicago MSA

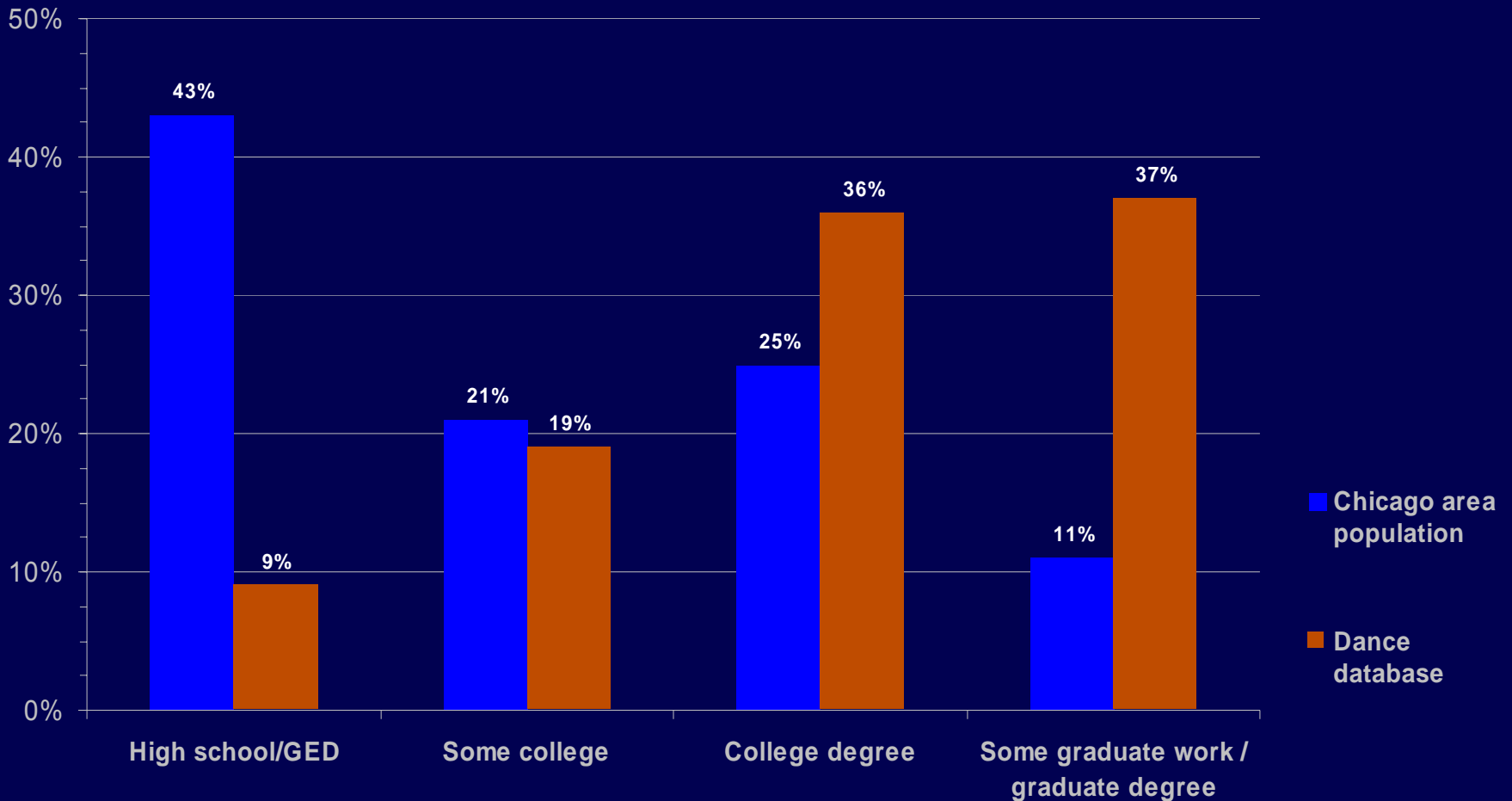


Color codes  
used in this  
report



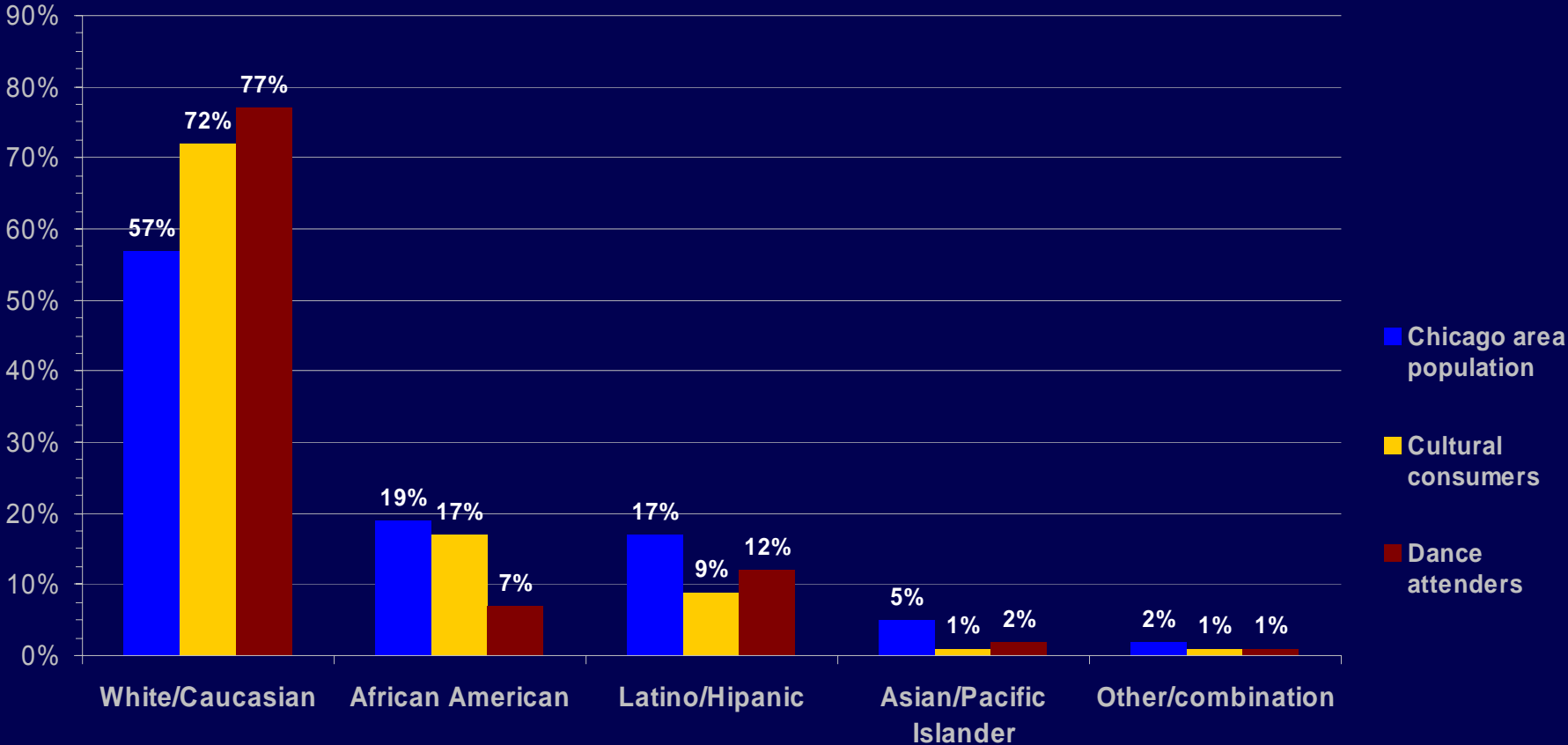
# Dance audiences are highly educated

## EDUCATION



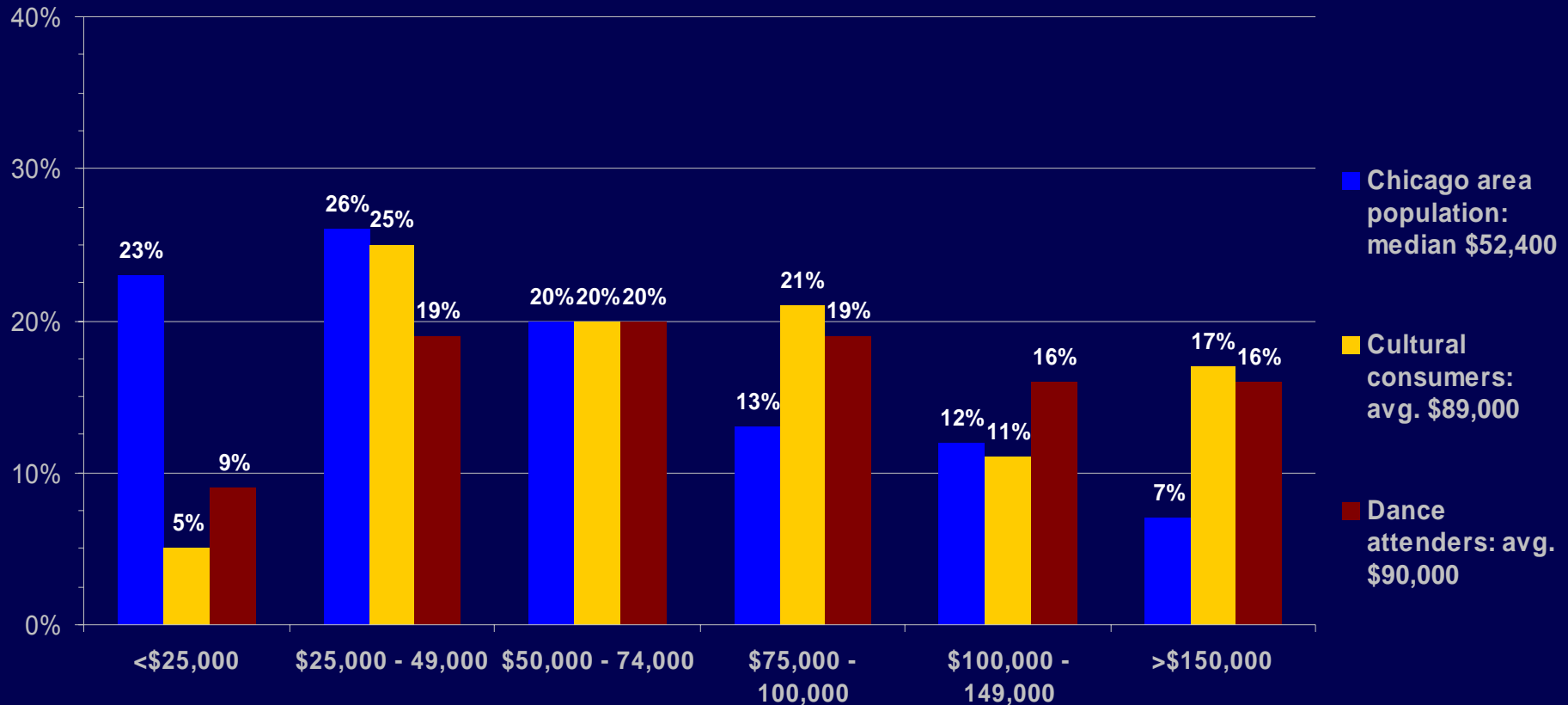
# Most dance attenders are Caucasian

## ETHNICITY



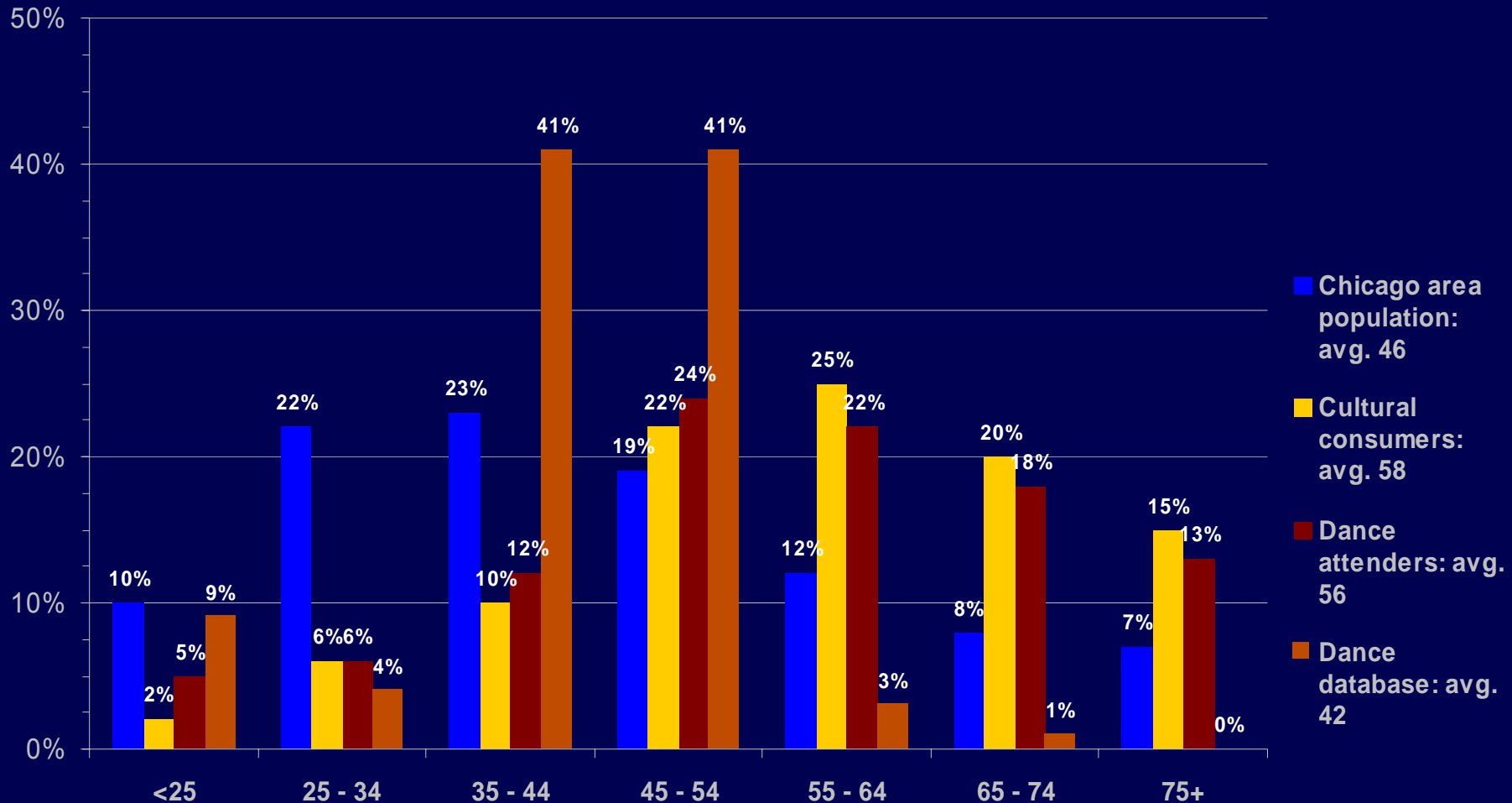
# Their incomes are well above average

## HOUSEHOLD INCOME

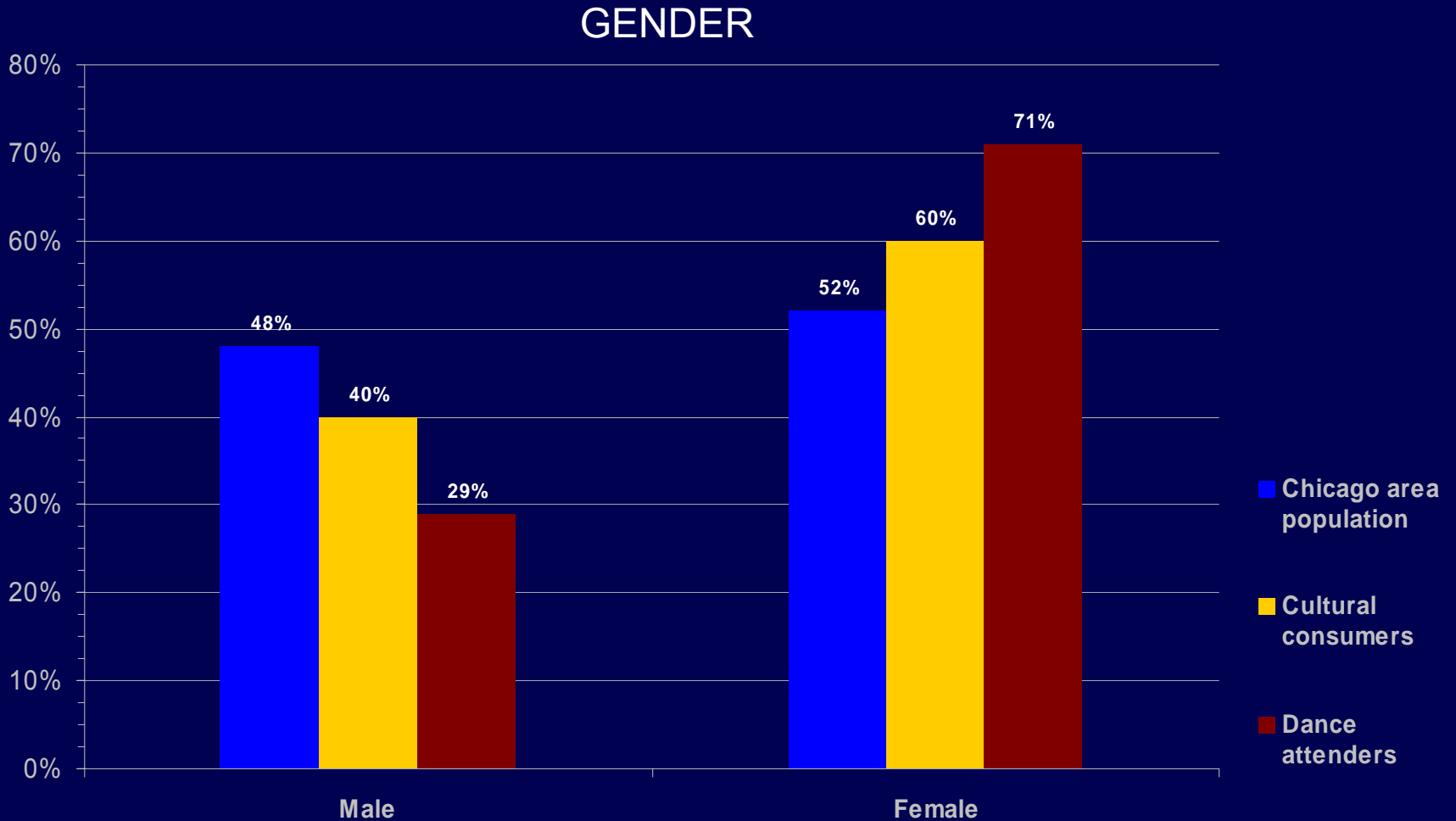


# Their average age is in the 40s

## AGE

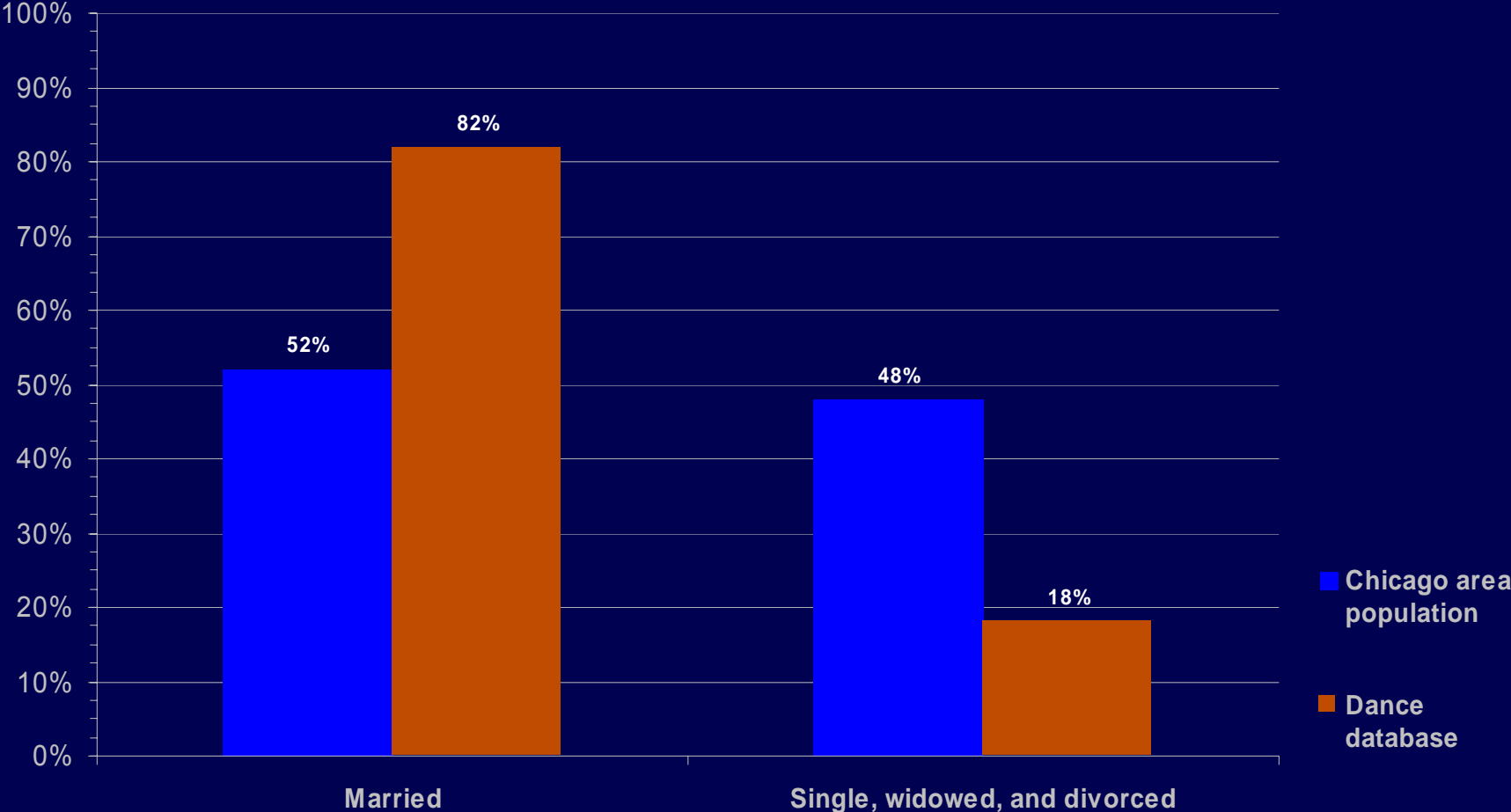


# Dance attenders are likely to be female



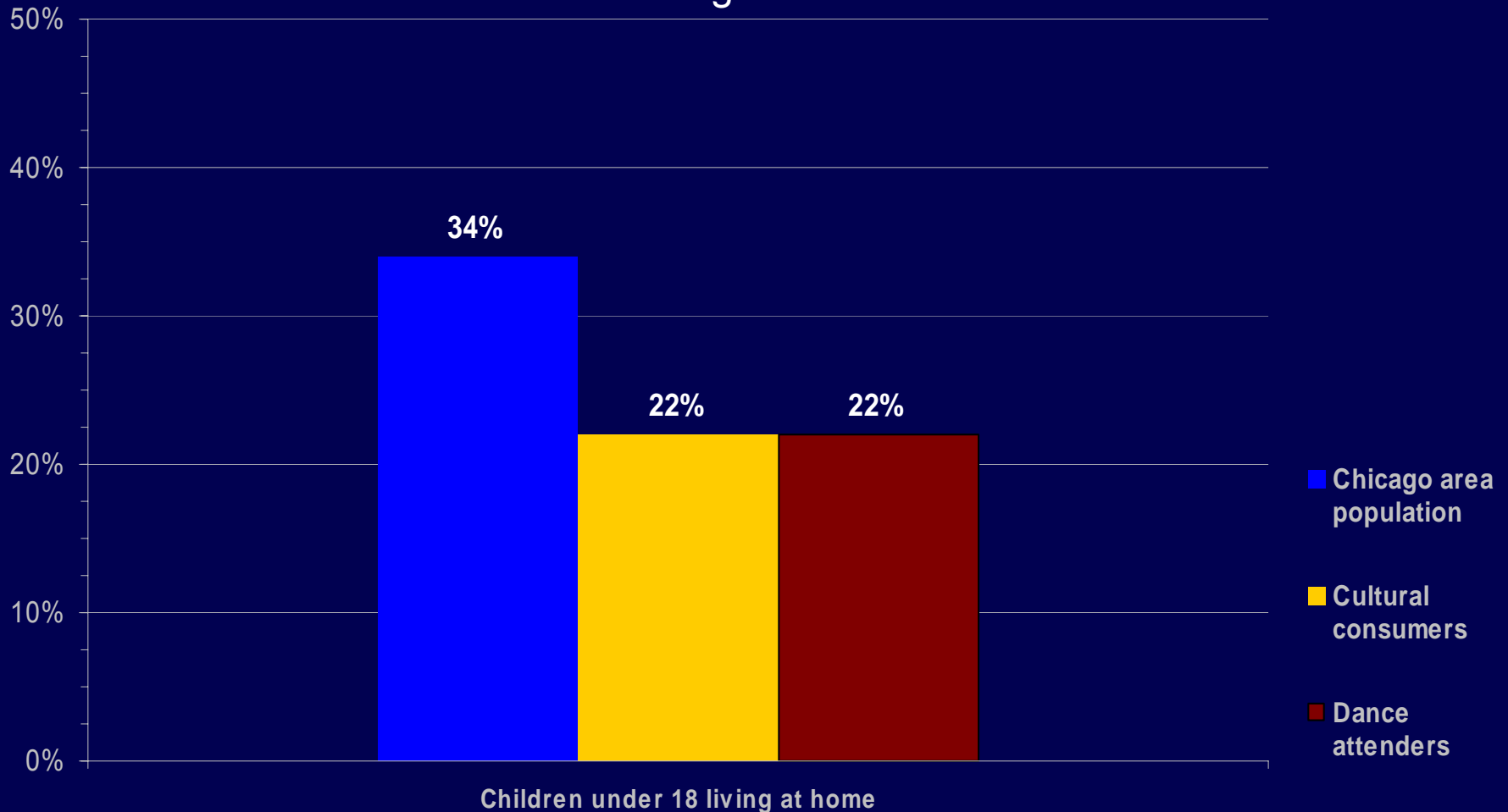
# Most are married

## MARITAL STATUS



# About 1 in 4 have kids at home

## CHILDREN under 18 living at home



---

---

# Key findings

---

# Dance attenders see a lot of dance

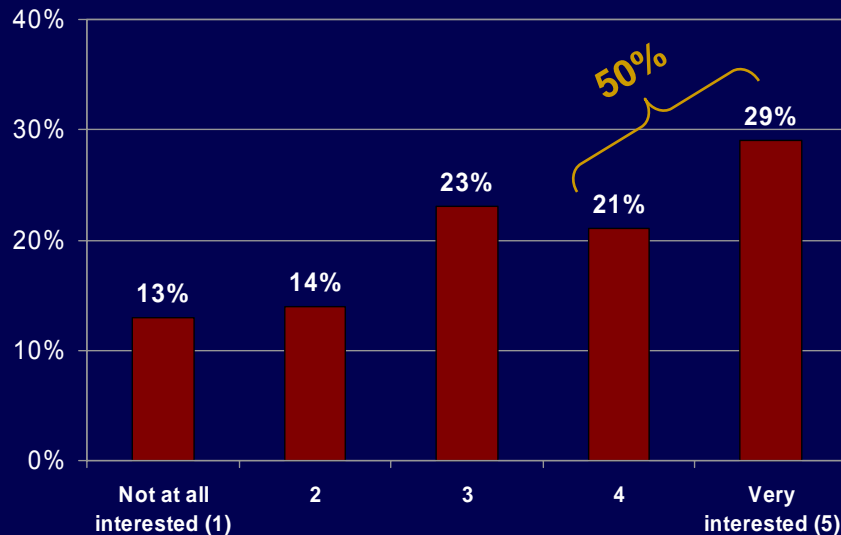
- Dance attenders had gone to an average of 4.6 dance performances in the last year
- 92% of cultural consumers had attended dance at some point in the past

Category	Dance Attenders		Cultural Consumers
	Attended ever	Attended last 12 months	Attended ever
Ballet	94%	71%	81%
Modern/contemporary	84%	58%	63%
Broadway musicals w/dance	70%	42%	72%
Jazz dance	65%	35%	49%
Culturally specific dance	55%	30%	51%
Tap	56%	24%	44%

# There is real potential for growth

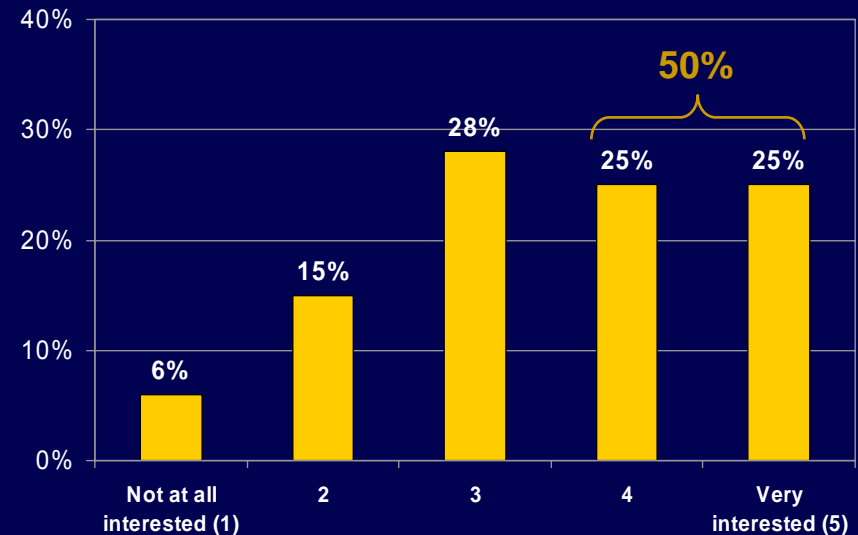
## Dance Attenders

“How interested are you in seeing other styles of dance [that you haven’t seen before]?”



## Cultural Consumers

“How interested are you in attending a professional dance performance in the future?”



- Half of dance attenders and cultural consumers were interested in increasing their dance attendance
- Potential for both deepening and broadening the audience

# Attendees weigh many factors

## Dance Attendees

"As you decide whether or not to attend a particular dance performance, how important is each of the following elements?" Average ratings on 1 to 5 scale

	Rating (1–5 scale)	Lower than average for...	Higher than average for...
Reputation of company or dancers	3.9	Modern & culturally specific	
Performance location or theater	3.9		Ballet, tap
Good seats	3.7		Ballet
Ticket price	3.6		
Seeing a work you haven't seen before	3.6		Jazz
Having seen the company before	3.3	Ballet, modern	Culturally specific, jazz, tap
Having someone to go with	3.3		Culturally specific
Convenient parking	3.1	Jazz	All others
Knowing titles of works	3.0	Culturally specific	
Newspaper reviews	2.9		Ballet, modern, musicals

---

# What would encourage them to go more?

---

- More information about performances
  - ▶ Increased advertising and communications
- Greater variety of dance performances
  - ▶ May be a misperception due to low awareness of other performances
- More background information on companies and works to be performed
- Lower ticket prices/promotions
- Hassle-free transit and parking

# Why cultural consumers don't attend

	% citing	Lower than average for...	Higher than average for...
I prefer other performing arts (music, theater, opera)	62%		Modern & culturally specific
Too busy or out of town too much to attend	50%		
Not aware of dance performances available	29%		Modern/contemporary
None of the dance performances appealed to me	23%	Tap	Jazz
The cost of the whole evening out was too much	23%		Ballet & culturally specific
Too much hassle getting to and from performances	21%		Tap
I don't enjoy dance performances that much	17%		
I didn't enjoy last dance performance I went to enough	9%		
For health reasons	6%		
Tickets were sold out for last performance I was interested in	6%		Broadway musicals
I didn't feel like I understood the last dance performance well enough to enjoy it	2%		

---

---

# Top Ways to Grow Dance Audiences

---

# #1: Increase awareness

	Unaided Awareness		Aided Awareness	
	Dance Attenders	Cultural Consumers	Dance Attenders	Cultural Consumers
1. Joffrey Ballet	68%	56%	96%	89%
2. Hubbard Street Dance	67%	54%	93%	89%
3. River North Dance	18%	3%	57%	41%
4. Gus Giordano	18%	6%	58%	36%
5. Melissa Thodos	10%	6%	40%	15%
6. Luna Negra Dance	9%	2%	52%	20%
7. Muntu Dance	9%	5%	41%	22%
8. Chicago Human Rhythm	8%	2%	33%	11%
9. Joel Hall Dancers	8%	2%	53%	26%
10. Trinity Irish Dance	8%	3%	58%	43%

- Most dance companies suffer from low awareness
  - ▶ Even Chicago's two largest companies show unexpectedly low unaided awareness—and these are active arts patrons!

---

# #1: Increase awareness

---

- By banding together, the dance community as a whole could undertake a “category” campaign for dance overall
- Individual dance companies also can address this issue
  - ▶ Partner with complementary organizations that can give them visibility with new audiences

---

## #2: Identify your target audience

---

- Audiences for the different dance types don't vary much demographically
- But they do differ in attitudes and benefits derived, which will be helpful for targeting audiences on a company-by-company basis
- More specific research findings will be available to dance companies for this purpose

# #3: Partner to build dance crossover

- Considerable audience crossover is already occurring among dance forms

Among those who attended at least 1 performance of ... in the last year,

...percent who also attended:

	Ballet	Tap	Jazz	Modern or contemporary	Broadway musicals w/dance	Culturally specific dance
Ballet		74%	72%	68%	78%	67%
Tap	26%		47%	31%	32%	27%
Jazz	36%	67%		49%	46%	44%
Modern or Contemporary	56%	71%	80%		61%	68%
Broadway Musicals	46%	53%	55%	44%		41%
Culturally Specific Dance	52%	58%	68%	64%	54%	

# #4: Partner with other cultural orgs

Percentage who attended within last 12 months	Dance Attenders	Cultural Consumers
Art museum	92	86
Professional theater performance	88	86
Professional music performance	84	86
Art gallery	72	63
Science or nature museum	69	63
Botanic garden or nature center	68	66
Professional opera performance	56	45
Zoo	54	56
History museum	53	56

- Dance attenders and non-patrons alike attend other arts at high rates
- Dance patrons are more likely to engage in their own artistic endeavors

# #4: Partner with other cultural orgs

- Crossover strength varies by dance type

KEY:  
 "++" much more likely than average  
 "+" more likely than average  
 "o" average likelihood  
 "-" less likely than average  
 "--" much less likely than average

Among patrons who ever attended this type of dance:

...percent who also attended in past year:

	Ballet	Tap	Jazz	Modern or Contemporary	Broadway musicals w/dance	Culture-specific dance
Art museum	++	+	o	+	o	o
Art gallery	+	+	+	+	o	o
Opera	+	--	--	o	o	-
Music performance	+	-	-	+	+	o
Theater	++	+	o	++	++	-
Science or nature museum	+	o	o	-	-	o
History museum	o	+	++	o	o	o
Zoo	o	o	+	-	+	o
Botanic garden or nature center	+	o	++	++	++	o

---

## #5: Train your future audiences now

---

- Childhood exposure to dance matters, especially when it's participatory
  - ▶ Both attending performances and taking classes as a child are associated with having attended dance within the last year, but taking classes is a much stronger influence
  - ▶ 57% of dance attendees had taken classes growing up, while only 35% of non-attendees had
- Has implications for dance companies' outreach efforts, as well as for the community at large

---

# #6: Position your organization

---

- Four benefits rise to the top for dance overall
  - ▶ Seeing something beautiful
  - ▶ Being entertained
  - ▶ Seeing something new or surprising
  - ▶ Feeling excited
- Dance companies should focus on the unique benefits people get from attending their performances
- Use clear language that people will understand
  - ▶ Audiences have widely varying understandings of what “modern”, “contemporary” or “jazz” might mean

# #6: Position your organization

**KEY:**

"++" much more likely than average  
 "+" more likely than average  
 "o" average likelihood  
 "-" less likely than average  
 "--" much less likely than average

	Ballet	Tap	Jazz	Modern/ Contemporary	Broadway musical	Culture specific dance
Seeing something beautiful	++	-	-	o	o	+
Being entertained	o	o	o	o	o	o
Feeling excited	o	-	o	o	-	+
Seeing something new or surprising	-	+	o	++	o	o
Being intellectually challenged or stimulated	o	o	o	++	o	o
Being transported elsewhere	+	+	+	+	-	++
Feeling relaxed	+	-	o	o	-	+
Feeling awed	o	-	+	+	-	+
Being spiritually uplifted	o	++	++	++	--	++

- Every type of dance can find points of differentiation

---

## #7: Get more information out there

---

- Dance audiences say they want more information about performances
- For non-dance cultural consumers, word of mouth is very important
  - ▶ Tactics could include encouraging audiences to bring others, and providing them with tools and information with which to introduce friends to dance
- There is high interest in a dance-wide web site
  - ▶ Low awareness of the existing music and dance web site

---

## #8: Provide more insight

---

- Many people want to understand the meaning behind the performances they attend
  - ▶ The desire to "figure it out" and engage rationally with the performance (instead of emotionally) is felt more by newcomers than experienced audiences
  - ▶ May be an unstated barrier for non-attenders
  - ▶ Patrons who currently attend ballet and tap have a greater than average desire to understand the meaning behind the works
- Although this didn't differ by gender, men had a stronger desire than women to know what to expect at a dance performance

# #9: Use targeted price promotions

- Price is moderately important to dance audiences
  - ▶ Household income influences price sensitivity, so income-level could be used in targeting price discounts
  - ▶ Promotions based on multiple purchases could be effective for generating incremental sales with current audiences without compromising revenue
- For non-attenders, price does not appear to be a significant barrier overall
  - ▶ 23% cite price as a reason for not attending dance
    - Often saying something costs too much really means they don't get enough value out of it, rather than it's too expensive
  - ▶ Non-attenders are no more price sensitive than dance audiences are

---

# #10: Work together!

---

- The community is off to a great start
  - ▶ Excellence in Dance initiatives underway
  - ▶ Participation in research by sharing lists
- However, need to continue to build on it to create a sustainable momentum