



Big Apple Performing Arts Audience Research 2014

Summary Report by Dr. Karen Yair

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1. Introduction

Big Apple Performing Arts (BAPA) has many exciting and ambitious plans, from new commissions and outreach projects to establishing a permanent physical home for itself and other LGBT+ performing arts groups in New York City.

Bringing these ideas to fruition will require a significant expansion to BAPA’s staffing and infrastructure. Increasing revenue from ticket sales and donor contributions will be essential, if a resilient foundation for this kind of growth is to be built.

This research study was commissioned to provide the statistical data needed to both increase and diversify audiences for the two choruses managed by BAPA: New York City Gay Men’s Chorus (NYCGMC) and Youth Pride Chorus (YPC) shows. Its focus is on understanding these audiences in terms of the following:

- Demographics:** Home location, age, gender and sexual orientation, income etc.
- Values and motivations:** Why audiences engage with NYCGMC and YPC, and what they value from the experience.
- Purchasing behaviours:** How audience values and motivations affect their ticket purchasing behaviour and donations.
- Preferences:** How preferences including venue, musical genre and political content affect audience engagement.

2. The Big Picture

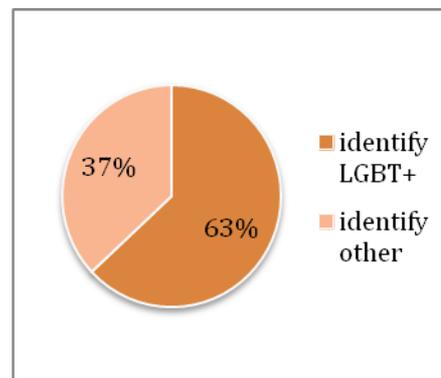
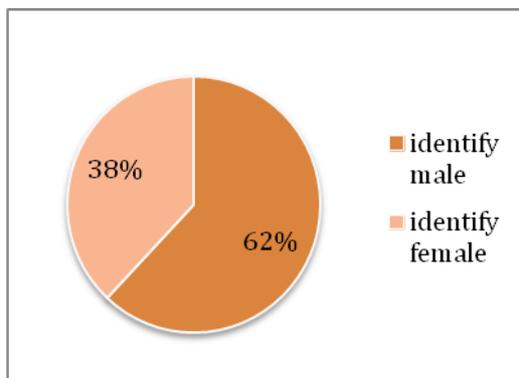
Here, we present a snapshot of our audiences – who they are, where they come from and how often they buy tickets or donate. We also look, in broad terms, at what they value about the NYCGMC show experience.

2.1. Who's out there?

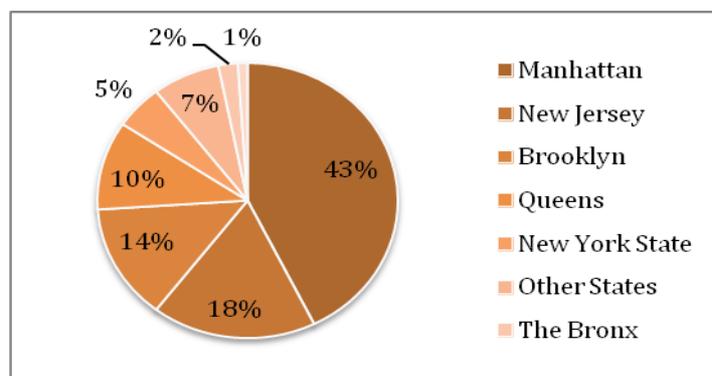
Our basic demographics profile an affluent, professional audience. Almost three in four respondents are employed full time, at a mid to senior executive level – a key audience for sponsors and advertisers.

Key statistics

- 70% employed full time
- 72% employed at mid to senior executive level
- Most common professions - business, arts, media, communications
- 66% in a relationship
- 17% household income > \$200,000
- 50% household income > \$100,000



Although almost half of our respondents live in Manhattan, we find a healthy audience spread across the five NYC boroughs and New Jersey.



Neighbourhood “hot spots” exist across Manhattan, Queens, Brooklyn and New Jersey:

Manhattan Inwood & Washington Heights Chelsea & Clinton Greenwich Village Soho Upper West Side Lower East Side	New Jersey New Plainland Jersey City Hoboken Maplewood South Orange
Brooklyn Downtown Brooklyn Prospect Heights Boerum Hill	Queens Astoria Heights Astoria Park

2.2. What are the audience’s relationships to NYCGMC?

Allegiance:

The audience’s stated allegiance is strong: 30% of respondents describe themselves as “loyal followers” and 28% as “proud supporters”, whilst 46% attend shows “regularly”.

The distinction between enjoyment of events and allegiance to an organisation is an important one, and here too, the indicators are good: only 14% of respondents say they feel little allegiance despite enjoying NYCGMC shows.

Overall, the loyalty felt towards NYCGMC should be valued as a great asset, when it comes to strategising for audience and ticket sales expansion.

Point of connection:

The research uprooted a long-held assumption within BAPA – that NYCGMC audiences are reliant on the friends and family of Chorus members themselves.

In fact, we find that NYCGMC audience members are as likely to have had no prior connection at all with the Chorus, as they are to have been invited to their first show by a personal connection. To be specific, 36% of respondents can be described as “friends & family”, and 35% as “fans” (with no prior connection).

The “friends & family” audience remains significant, of course, displaying strong loyalty to the organisation and considerable future donor potential.

However, revealing the extent of the “fan” audience should give BAPA renewed confidence in the strength of its offer and its attractiveness to a general audience.

As donors:

BAPA donor base is substantial, and has significant potential for further growth. 18% of respondents have not yet donated but are willing to do so; and 18% have donated in the past and just need to be re-engaged. Collectively, this grouping represents an untapped donor pool amounting to over one third of the BAPA audience.

Donations are made more frequently at shows than at any other time. Almost one in three respondents makes a donation at each show they attend, and a further 25% do so occasionally. However, only one in ten respondents donates on an annual basis. Here again, there is latent potential to increase more frequent gifts from existing donors.

Overall, BAPA donors overall are driven to donate by their desire to “give something back” to society (85%), and to contribute to social justice agenda (72%). Meeting these needs is a key tactic for cultivating audience members as first-time, then regular and annual donors.

As gatekeepers:

The research revealed the importance of a previously unseen group we call “gatekeepers”, to the expansion of NYCGMC’s audience.

“Gatekeepers” are individuals who proactively organise groups of their own friends, family members and / or co-workers to attend NYCGMC shows. They may – for example - set the date, buy a block of tickets and organise a dinner reservation for the group.

Their contribution is important because personal recommendation is the most common trigger for individuals to purchase tickets to a show. Remarkably, on average each “gatekeeper” responding to our survey had introduced seven new audience members to NYCGMC during their time as an audience member.

The 14% of respondents identifiable as “gatekeepers” are strong assets for NYCGMC, that should be incentivised to continue making new introductions. New “gatekeepers” should also be identified from the further 14% of respondents describe themselves as, “the kind of person who likes to organise trips to cultural events for my friends”. BAPA’s challenge is to double the number of “gatekeepers” by finding ways of supporting them to translate their intent into action.

2.3. What does the audience value?

First - The Cause:

‘Supporting a cause I believe in’ is the most common reason for audience members to attend their first NYCGMC or YPC show, alongside seeing a friend or family member perform. The continued relevance of gay choruses is sometimes debated, even within LGBT+ organisations themselves. However, an impressive 94% of our respondents continue to see them as “relevant and important”, almost 35 years since NYCGMC was founded.

Overall, support for transgender issues and concern for the international persecution of LGBT+ people are common amongst our respondents. However, the highest level of political engagement with LGBT+ issues is in terms of coming out and “finding a voice as a gay man”.

As regards political orientation, 70% of respondents describe themselves as “liberal” or “very liberal”; with the vast majority of respondents expressing their comfort both with challenging content and with strong political messaging (80% and 74%, respectively). As we shall see in section 4, however, expectations for the delivery of this political content vary greatly between audience segments.

Second - The Show:

The music or the program on offer is the second most common reason for new audience members to attend an NYCGMC show.

Overall, the majority (75%) of respondents like to “mix it up”, stating that they sometimes like to be entertained, and at other times to experience extraordinary art. Of those who lean towards either arts or entertainment, almost twice as many respondents want to have fun and be entertained on a night out than to experience art.

Our respondents strongly associate NYCGMC with current / retro pop hits, musical theatre and the mainstream choral repertoire: almost all respondents want to see more of these genres on stage. However, 47% of respondents also say that they want to experience a range of musical styles. As we shall see in section 4, younger respondents tend to prefer a broader musical experience, as do African American and Asian American respondents.

A multi-sensory experience, involving dance and visuals as well as music, is important for three quarters of our respondents; and 61% specifically want to see dance as part of the show. A vocal minority objects to the prominence of the drag performances within the NYCMGC experience, but 83% are supportive – a figure that rises still further within the heterosexual audience.

Almost all (96%) of respondents agree that they “really enjoy” authentic-sounding recreations of music from the past (including the recent past). Guest artists might appear unimportant – only 7% of respondents say they were enticed to their first NYCGMC performance by a named guest performer. However, they can clearly add value as a way of bringing music from the past alive.

Prestigious venues appear to be not as important to our audience as might have been imagined: only one third of our respondents say they enjoy attending shows in “big, prestigious venues with a real sense of occasion”.

More respondents enjoy small, intimate venues (44%) and unusual or non-traditional spaces (36%), although comfort is important for 55%. Price point is an important consideration, with over half of all respondents describing themselves as “price conscious” and 28% describing current ticket prices as a barrier to purchase.

Third - The Community:

Our respondents are very socially oriented: over 80% enjoy NYCGMC shows as a social occasion and value the sense they gain of “being part of the community”. The show represents a “special night out with a few friends” for over half of all respondents, and a “lively night out with a bigger group” for a further one in three. Just under one third of respondents see the show as a date night.

The majority of respondents build the NYCGMC show experience into a bigger night out: 70% typically have dinner with friends, before or after the show, whilst 38% have drinks. In terms of building on this experience, 37% would like to join the Chorus after-party, 27% would like to meet performers and 24% would value a VIP reception.

2.4. How does the audience connect with NYCGMC?

Online:

Word-of-mouth recommendation is currently the only effective strategy for engaging new audience members. Amongst current audience members too, e-newsletters and social media feeds are the biggest draw, prompting ticket purchasing by 56% and 28% of respondents respectively. Fewer than 5% of first-time ticket buyers are enticed by any form of advertising.

Social media is particularly important in this context, as notifications can act as a form of peer referral: 20% of respondents state that seeing online that friends are attending an event prompts them to buy tickets.

Social media can also, of course, be used to create anticipation around a forthcoming event; and 21% of our respondents say that this kind of online buzz influences them to buy tickets. As photo-sharing sites are particularly geared towards this kind of informal, in-the-moment storytelling, it is worth noting that Instagram is visited by 23% of our social media users, compared to the 3% who visit Flickr. However, our data also shows a strong cognitive preference amongst our respondents, for written information over visuals.

Social media use patterns are detailed fully in our main report, which covers each of the main platforms used by our respondents: Facebook (77%), LinkedIn (44%), YouTube (38%) and Twitter (28%).

Offline:

Specific, targeted investments in print media remain valuable. Event-specific postcards prompt ticket purchases for 22% of respondents, and our research offers tools for increasing the effectiveness of postcard drops, by targeting LGBT-friendly businesses in neighbourhood hot spots (see section 2), and also - potentially - by using third party services such as Nielsen Prizm to identify “off the radar” neighbourhoods with corresponding demographics.

Season brochures and listings (e.g. in *Time Out*) are not currently effective in prompting ticket sales—only 9% and 7% respectively of respondents are influenced by these relatively costly forms of advertising.

3. Under the surface

We wanted to get to know the different personalities within the BAPA audience. Here, we explore the four most prominent lifestyle segments we identified, focusing on each segment's values, motivations and preferences.

3.1. The Civically Engaged Audience (33% of respondents)

- Mature, gay, males: more members aged 65+ than any other segment
- Loyal, affluent, generous supporters: proud to “give something back”
- See events as an expression of civic pride: value a sense of occasion
- Look for political or emotional resonance from the show experience
- Interested in improving society and contemplating life's bigger questions
- More likely than others to donate and to buy top price seats, although could potentially afford large or more frequent gifts
- Favour the Holiday Spectacular and fundraiser shows, and highest levels of support for Youth Pride Chorus shows (50% attend)
- Value familiarity: upbeat, mainstream entertainment, but will occasionally take chances on hearing unfamiliar types of music
- More likely than other segments to value guest artists and prestigious venues
- Value social media (especially Facebook) as a way of reinforcing their connection with NYCGMC and building anticipation around shows
- Significant untapped ‘gatekeeper’ potential: less than half of those who like to organise group trips to shows actually do
- Also involved in non-profit board work, building co-ops, faith-based groups and community matters / civic affairs: new audience members could be reached through these groups.

3.2. The Diversity Seekers (23% of respondents)

- Middle-aged, gay males
- Most ethnically diverse segment (despite being 80% white)
- Modest income but generous: most likely segment to make an annual donation, but could potentially afford more frequent gifts
- Choose to buy fewer, top priced tickets rather than more, cheaper tickets
- Want to feel inspired by performers' stories – to see how music can change lives
- Political engagement focuses on understanding the world through the experiences of others
- Value small, intimate venues for their connection with performers
- Enjoy meeting new people and networking
- Have broad musical tastes and moderate attitudes to risk: interested in music from unfamiliar cultures
- Value the quality of ensemble singing more than any other segment
- Enjoy an emotional journey through music
- Equally likely to attend any NYCGMC and Youth Pride Chorus shows
- Also involved in networking organisations and fitness activities: new audience members could be reached by connecting with networking groups and gyms / sports clubs.

3.3. The Blockbusters (15% of respondents)

- Younger to middle-aged segment
- Relatively mixed gender / orientation (although predominantly gay males)
- Moderately affluent, yet experience ticket price as a barrier to purchasing: relatively unlikely to buy top priced seats or make a donation
- Regular supporters of the Big Gay Sing and (to a lesser extent) the Holiday Spectacular
- Lowest levels of support for Youth Pride Chorus
- Enjoy mainstream entertainment: a high energy, fun performance
- Value comfort, familiarity and a sense of expectations met
- Enjoy music from the past, performed as it was originally recorded
- See events as “a big night out” with existing friends, especially valuing after-parties
- Latent potential as “gatekeepers” – only moderately proactive in organising groups despite social orientation
- Value forward planning – needs frequent, early event reminders, especially via Facebook
- Politically neutral - engagement focuses on “supporting a good cause”, and they are averse to challenging messages and strong language.
- Religious orientation is twice as likely as for other segments – faith influences arts and entertainment choices.
- Also involved in amateur creative activities, eg music or drama. New audience members could be reached by connecting with these interests, for example through social media hashtagging.

3.4. The Experientials (12% of respondents)

- Youngest segment, with more female and heterosexual members than any other
- Only segment where ‘friends & family’ significantly outnumber ‘fans’ (see section 2.2)
- Least affluent and most price-sensitive segment: ticket price is a barrier for 42%
- Latent donor potential: 25% have not yet donated but would consider doing so
- Core audience for smaller events: highest attenders of the cabarets and Summer Show, although attendance is relatively high across all events
- Risk takers – value new / unusual / even unconventional experiences
- Greatest untapped ‘gatekeeper’ potential amongst the segments: only one third of those who like to organise group trips to shows actually do
- Low attendance at Youth Pride Chorus shows
- More interested in unusual or non-traditional performance spaces than in prestigious venues
- More oriented towards “art” than “entertainment”, in contrast to other segments
- Also enjoy the energy of a great performance and mainstream musical genres
- Most politically liberal segment
- Appreciate challenging content and wants to see LGBT+ politics in action, whilst keeping the focus on the music
- The only segment to be more interested in big-picture politics than individual stories
- Keen to meet new people
- Leisure time focuses on cultivating a wide range of cultural interests, including music, theatre and other art forms. New audience members could be reached by targeted advertising.

4. Conclusions and Next Steps

BAPA audiences are more complex than previously imagined: each of our four audience segments connect with the NYCGMC and YPC for particular reasons and in specific ways, guided by its own distinctive values, preferences and expectations.

Maintaining and growing all four of these audience segments is important if BAPA is to achieve its business objectives whilst remaining true to its mission and values. Clearly, it is important to build on the loyalty of BAPA's more mature and established audiences, whose community involvement is essential to the organisation and whose generosity helps to sustain it. At the same time, working for full equality means building younger and more diverse, under-represented audiences, some of whom – importantly, as BAPA's established audiences age – are also its future donors and supporters.

Our research findings will support BAPA in refining its existing marketing activities, such as postcard drops, e-blasts and social media campaigns. Using our new intelligence will allow it to target existing audiences more effectively using these tools, whilst reaching out to new audiences – geographically (see section 2.1), through their other interests (see section 3), and online (see section 2.4).

In addition, our research reveals three 'big ideas' that we recommend be adopted as strategies for expanding the four segments:

Fulfilling latent donor potential – audience / donor cultivation. In section 3.2, we revealed considerable untapped donor potential across the BAPA audience as a whole. In section 4, we saw opportunities to introduce the Experiential audience as new donors, and to increase giving from the more affluent (and already generous) Civically Engaged Audience and Diversity Seekers. Donor cultivation strategies, which encourage audience members to donate once, then occasionally, then annually – and to gift ever-increasing amounts, are cornerstone of many audience development strategies. Using the intelligence we have about BAPA's target segments' motivations and preference should enable an attractive donor cultivation strategy to be designed and built.

Extending network - supporting 'gatekeepers'. In section 3.2, we identified the significance to BAPA of unseen 'gatekeepers' – that is, individuals who regularly introduce new audience members. Rewarding these gatekeepers and providing incentives for further introductions would be a productive strategy for further audience growth. The Experimentals, the Civically Engaged Audience and the Blockbusters are (in order of significance) the key target segments here: again, designing incentives that meet their needs will be crucial to success.

Selling the 'big night out' - reimagining the season ticket. As we saw in section 3.3, almost all audience members see an NYCGMC show as a social occasion. There is an opportunity here to create enticing social experiences, available only to season subscribers. Creating packages of multi-event tickets, discounts for introducing a friend, after-party access and restaurant discounts – for example – would effectively recreate the season ticket as an Audience Membership scheme with significant growth potential.

BAPA is strongly positioned to grow and diversify its audience. Its dedicated following provides a strong foundation for expansion; whilst the breadth and scale of its annual programming allows for a multifarious approach to audience development. The breadth of its audience is truly an asset, whose growth potential it now has the data and tools to harness.

5. Footnote - methodology

468 people responded to our online survey of 5000 current and lapsed NYCGMC / YPC audience members, producing a useable response rate of 8.2% (above our target of 7.5%).

We used incentives, email, presentations at chorus rehearsals and a range of social media platforms to encourage responses from across the audience spectrum. Nonetheless, response rates from YPC audiences, lapsed audience members and ethnic minority audiences were low. In the future, focus groups could be used to engage these under-represented and hard-to-reach audiences.

We analysed the survey data against a framework published by Wolf Brown in 2007. This framework categorises the US performing arts audience into 20 lifestyle segments, four of which appeared prominently in our own data. Exploring how each plays out within the NYCGMC / YPC audiences allowed us to understand how their values and motivations influenced underpinning purchasing behaviour.

A detailed methodology is supplied in our full report.

6. Acknowledgements

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Big Apple Performing Arts (BAPA) is the New York City home for lesbian, gay, bisexual, transgender plus (LGBT+) performing arts groups that are committed to excellence and demand a world of full equality. It is the management company for:

New York City Gay Men's Chorus (NYCGMC): harnessing the power of song to inspire its members and audiences to create a world that embraces the dignity of every human being.

Youth Pride Chorus (YPC): bringing together a diverse community of New York City LGBT+ and straight youth to discover their own power through performance, as they become agents of change.



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