
Arts for Delaware's Future Consortium

Audience Research Findings

Phase 2 Report: Community & Patron Surveys

February 4, 2009



Audience research and planning for the mission-driven world.

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Overview

Project Background

Phase 2 Objectives & Overview

Analytical Plan

Project Background: Taking a three-phase approach to the AFDF research & strategy challenge

Project Plan:

1. Situation Assessment

A. Existing research review

B. Patron data aggregation & mapping

C. Stakeholder interviews

D. Market assessment

2. Audience Research

A. Community survey

B. Current Audience survey

C. Focus groups with growth segments

3. Strategy Development

A. Creative ideation session

B. Targeting and messaging plan

C. Guidance in agency selection

Today's report

Phase 2 Objectives: Key research questions shaped these two audience surveys

- What are the current awareness and participation levels of cultural institutions/offering in the Wilmington area – including AFDF organizations and others?
- What are the perceptions of AFDF organizations, and of the Wilmington arts scene in general?
- What are the decision-making factors that influence cultural participation?
- What are the motivations that would encourage more patrons to attend these organizations (and/or attend more often)?
- What are the barriers that are preventing potential audiences from attending (or attending more) now?
- What are the highest-potential audience segments from the broader cultural community that could increase the size of the AFDF patron base?
- What opportunities are there to increase current AFDF patrons' engagement and attendance?

Phase 2 Objectives: Several hypotheses and questions from Phase 1 informed the research and analysis of Phase 2

1. Regional opportunities and differences

- The highest potential for growth will likely come from regions further outside of Wilmington – particularly in nearby counties in PA and NJ
- In particular, by identifying people in those areas who *look* like current AFDF patrons but do not yet attend
- However, regional differences may be strong when analyzing opportunities and barriers for each of these areas outside of New Castle County
 - Differences that may require separate, targeted outreach efforts to each of the key regions

2. Crossover among AFDF patrons

- Crossover among AFDF patrons could be greatly increased
- Optimizing this crossover may be the most efficient way to increase the size of each AFDF organizations' patron base
 - Directing efforts towards a pool of cultural consumers already identified, and already active in Wilmington arts

3. Wilmington arts “brand”

- A lack of awareness of and negative perceptions about Wilmington's cultural offerings contribute to AFDF organizations' audience acquisition challenges
 - Civic/cultural pride in Wilmington is likely a particular challenge for those outside of New Castle County – coupled with the proximity of arts offerings in Philadelphia (and NYC)

Phase 2 Overview: Methodology

2. Quantitative Audience Research Surveys August 2008–January 2009

A. Community Survey

- telephone survey of 999 households, in 4 regions:
 - New Castle County
 - Pennsylvania
 - Downstate Delaware
 - New Jersey
- pre-qualified to be “cultural consumers” (min. of 2 cultural activities in past year)
 - 40% of the general population met this definition
- captured awareness, perceptions, motivations, barriers, attitudes, and behaviors (AFDF and related)
- analyzed by demographics, geography, and behaviors
- identifies potential targets for increasing the size of AFDF organizations’ patron base

B. Current Audience Survey

- mail and online survey of AFDF patrons from database (for DAM: on-site visitor survey)
 - 2042 responses in total
- captured awareness, perceptions, motivations, barriers, attitudes, and behaviors (AFDF and related); many measures similar to Community Survey
- identifies opportunities for increasing AFDF organizations’ patron size *and* engagement level

Analytical Plan: Audience definitions

- Throughout the report, we present data from the two surveys, showing data by sub-groups where appropriate
- Below are the definitions (and sample sizes) of these audiences, and the color schemes used in charts to identify these populations

“Cultural Consumers” (community survey)
Overall Cultural Consumers entire sample from community study n = 999
New Castle County residents of New Castle County, DE n = 319
Pennsylvania residents of Delaware and Chester Counties, PA n = 415
Downstate Delaware residents of Sussex and Kent Counties, DE n = 144
New Jersey residents of Salem and Gloucester Counties, NJ n = 121

“Current Audience” (current audience survey)	
Overall Current Audience entire sample from current audience survey; all AFDF patrons combined n = 2042	
Multi-Organization patrons attending multiple AFDF orgs. in past year n = 584	Current Patron attended specific AFDF org. in past year <i>n = dependent on org.</i>
Single-Organization patrons attending a single AFDF org. in past year n = 1458	Lapsed Patron has attended specific AFDF org. but not in past year <i>n = dependent on org.</i>
	Non-Patron has never attended specific AFDF org. <i>n = dependent on org.</i>

Analytical Plan: Identifying significant differences

- Throughout the report, we note when there are statistically significant differences between sub-groups
 - ▼▲ Solid red arrows are used to note that a particular sub-group is significantly higher/lower than all other sub-groups
 - △ A hollow red arrow is used to note that a particular sub-group is significantly higher than one or more – but not all – other sub-groups
 - Unless otherwise noted, significance is measured at a 95% confidence level ($p < .05$)

Executive Summary

Executive Summary

- I. There is substantial opportunity to increase patron crossover *within* the AFDF consortium, as was postulated in the Phase 1 Situation Assessment
 - This strategy for audience acquisition will be made easier by the consortium's shared commitment to promoting cultural engagement among its entire patron base
 - While naturally not *all* DSO patrons will become DTC patrons, for instance, it is clear that the potential for each institution to attract new audiences from within the greater pool is high, since there are a notable number of people attending theater but *not* DTC, for instance
 - A secondary strategy will be to increase cultural broader crossover, between AFDF and non-AFDF institutions in the Wilmington area

- II. Among the area's cultural consumers, about half (49%) have not been to an AFDF institution in the past 5 years: this is a sizeable potential audience that the consortium can tap into to grow its patron base

- III. There are no significant demographic distinctions between AFDF institutions' current audiences and the broader culturally-active population in the region
 - Thus, if AFDF considers the larger pool of culture-goers in the region to be the highest potential for increasing new audiences, its demographic targets won't be distinct from those it reaches now
 - However, the culturally-active population overall *is* distinct from the wider general population, though in ways we'd expect (wealthier, better-educated, older, and less ethnically diverse)

Executive Summary

IV. Regions within Pennsylvania and downstate Delaware appear to be areas of highest potential growth for AFDF

- Each region has different qualities – and different challenges – that will be explored in depth in this report
 - We did see that the two Pennsylvania counties look and behave very similarly to each other, so reaching Chester and Delaware Counties would require the same strategies
 - However, in the focus groups we must investigate in greater depth how the draw and dynamics of the Philadelphia arts landscape affects these Pennsylvania culture-goers' decision to partake in Wilmington arts
- AFDF should be careful not to disregard New Castle County – including Wilmington itself – for its growth potential (as well as maintenance of current audiences)
 - In many ways the high-potential non-patrons living in New Castle County are AFDF's lowest-hanging fruit; barriers of awareness and convenience are much lower for that segment
 - But since AFDF's penetration is already highest in this region, finding new audiences close by will be incremental rather than extensive
- Putting efforts into drawing new audiences from New Jersey would not likely yield as many new patrons as focusing on these other areas will
- These findings support and deepen the model used in the Situation Assessment, which identified high-potential regions based on ZIP code analysis of demographic characteristics

Executive Summary

- V. Currently, Delaware cultural consumers – both AFDF patrons and non-patrons – exhibit a stronger affiliation with the consortium than do people from out-of-state
- In many ways, this is to be expected, as Wilmington is the closest major arts center in Delaware
 - As such, the data shows that AFDF institutions have higher top-of-mind-awareness, greater levels of familiarity, and higher attendance among Delaware cultural consumers than those from other regions
 - These connections will work in AFDF’s favor as it works to engender interest and attendance among a broader swath of Delawareans
 - Since only 5% of current audience sample lives Downstate, the potential to translate this awareness/affiliation into attendance is high; from the regional proportions seen in the cultural consumer sample, it appears that AFDF’s proportion of patrons being from downstate could be as high as 15%
 - But it also demonstrates that AFDF will need to work harder to create these connections among new audiences from outside of Delaware
- VI. The data confirm a hypothesis laid out in the preceding Situation Assessment: that perceptions of the Wilmington “brand” must be improved before significant headway is to be expected in revitalizing the arts scene
- Developing a broader audience base for the arts in Wilmington is a challenge not limited to AFDF – and one not even limited to the arts
 - Even among New Castle County residents active in Wilmington’s cultural offerings, there is only a tenuous sense that the city’s arts landscape is vital, and that it has been making headway for the better
 - While *disagreement* with the vitality of the arts landscape overall isn’t overwhelming, we would have expected to see greater “championing” of Wilmington’s at least from the most active segment living closest to the city
 - But, these discouraged perspectives on the state of Wilmington’s arts scene are strong evidence for a concerted collaboration among AFDF, other arts organizations, the city, and the state to address these perceptions

Executive Summary

VII. While each institution has its own set of motivations, barriers, and perceptions, The Grand's situation is more distinct from the other institutions

- Awareness and interest in The Grand is higher than it is for the other consortium institutions (even within the broader cultural community), and The Grand has the greatest share of attendance within the AFDF patron base
 - However, its audience's likelihood to cross over to the other AFDF institutions is comparatively low, so its short-term benefits may come more from increased audiences at DSO and OD rather than in for its own programming
- However, it is most important that *all* members of the consortium will benefit from the collaboration – even if perhaps in different ways
 - The longer-term, consistent benefit to all institutions will come hand-in-hand with the revitalization of Wilmington's cultural and civic life; that will increase audience demand – and financial support – for all institutions

Current Situation: Cultural Consumer Profile

Cultural Consumer Profile: Demographically, the region's average cultural consumer is middle-aged, wealthy, and well-educated

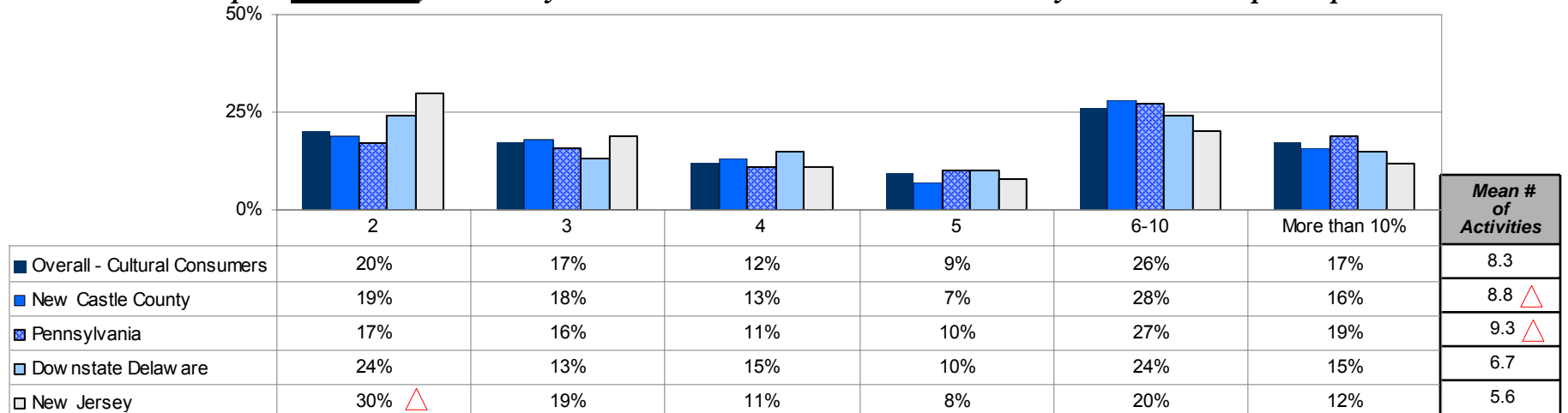
	Cultural Consumers Overall
Gender	<i>n=999</i>
Female	63%
Male	37%
Age	<i>n=984</i>
Under 25	2%
25-34	10%
35-44	20%
45-54	27%
55-64	20%
65-74	13%
75 or over	8%
<i>Average age</i>	<i>52 years old</i>
Kids under 18?	<i>n=989</i>
Yes	37%
No	63%
Ethnicity*	<i>n=967</i>
Caucasian/White	89%
African-American/Black	8%
Asian/Pacific Islander	2%
Native American	2%
Latino/Hispanic	1%
Other	0%

	Cultural Consumers Overall
Income	<i>n=859</i>
Under \$25,000	6%
\$25,000-49,999	17%
\$50,000-74,999	23%
\$75,000-99,999	18%
\$100,000-149,999	22%
\$150,000-199,999	8%
\$200,000 or more	6%
<i>Average income</i>	<i>\$91,094</i>
Educational Attainment	<i>n=989</i>
High school/GED or less	15%
Some college	19%
College degree	31%
Some graduate work	9%
Graduate/Post-graduate work	27%
Region**	<i>n=999</i>
Pennsylvania	42%
New Castle County	32%
Downstate Delaware	14%
New Jersey	12%

- This culturally-active segment of the population is demographically distinct from the general population, when comparing it to the census
 - Cultural consumers, compared to the general population, tend to be:
 - Primarily female
 - Older
 - Disproportionately Caucasian
 - More highly educated
 - More affluent
 - As we'll see in the following section, these cultural consumers are much in line, demographically, with AFDF organizations' current audience
- Implications for AFDF:
 - AFDF can continue to target the same demographic it is currently reaching, as AFDF's lowest-hanging fruit is *not* the general population, but a population that looks very similar to this one

Cultural Consumer Profile: The average cultural consumer participated in approximately 8 activities in the last year

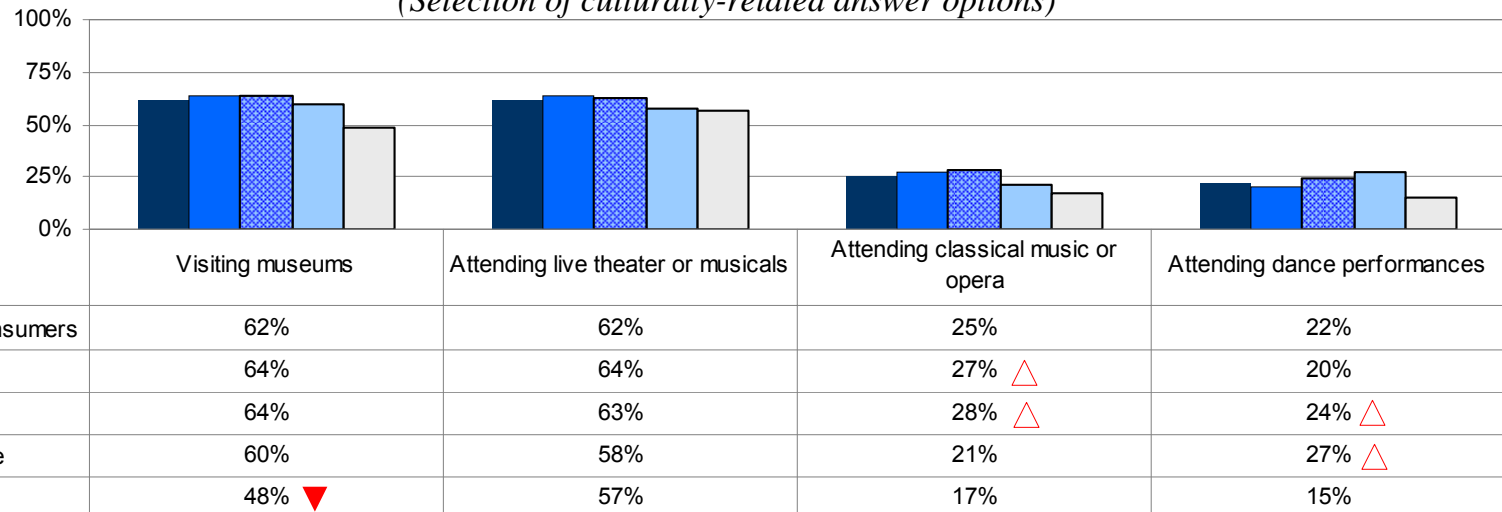
“In the past 12 months, how many arts or cultural activities or events have you attended or participated in?”



- 80% of the sample had participated in more than the minimum of two activities that defined our “cultural consumers”
 - Those with kids at home participate in fewer activities (7/year, vs. 9/year for those without kids)
 - Cultural consumers who attend AFDF organizations are much more culturally active than their peers, attending 12 activities in the past year, on average (vs. roughly 8)
- Residents in the two Pennsylvania counties are the most culturally active, while those in New Jersey are the least active
 - NJ cultural consumers also engage in a different portfolio of cultural activities: they are more likely to visit zoos and aquariums and to attend sporting events while being less likely to visit museums and attend dance performances (see next page)
- Implications for AFDF:
 - Throughout the report we’ll gauge the potential and strategies to tap into the sub-segment of the greater community already highly active in arts and culture
 - Based on the current level of cultural activity among these regions, Pennsylvania appears to be a higher-potential regional target for AFDF, while New Jersey is a lower-potential region

Cultural Consumer Profile: Visiting museums and attending live theater are the most common cultural activities

“Which of the following entertainment or leisure-time activities do you participate in often?”
 (Selection of culturally-related answer options)



- Most cultural consumers visit museums and live theater at about equal levels; fewer (about one quarter) attend classical music or dance
 - New Jersey is the exception: fewer NJ respondents visit museums compared to their counterparts – and compared to live theater
 - In general, PA respondents are more active in classical music or dance compared to the other regions
- Implications for AFDF:
 - Because classical music and opera are generally attended by a smaller sub-set of the culturally-active population, the DSO and OD may have a more narrowly distinct pool of the potential audience to tap into, based on their stated cultural preferences

Cultural Consumer Profile: Longwood, PMA, and Winterthur exceed all AFDF organizations as popular local attractions

“How recently did you attend each of the following organizations?”
 (% attending in the past 5 years)

Arts and Cultural Organizations in Wilmington and Philadelphia	Cultural Consumers Overall n=999	New Castle County n=319	Pennsylvania n=415	Downstate Delaware n=144	New Jersey n=121
Longwood Gardens	76%	80%	83%	56%	63%
Philadelphia Museum of Art	61%	47%	79%	38%	59%
Winterthur Museum & Country Estate	50%	69%	46%	39%	29%
DuPont Theatre	36%	61%	21%	31%	24%
Delaware Art Museum	35%	61%	21%	29%	17%
Hagley Museum	34%	61%	21%	27%	17%
The Grand Opera House (other than for the Delaware Symphony or OperaDelaware)	33%	65%	19%	22%	11%
Delaware Museum of Natural History	32%	54%	21%	24%	18%
The Philadelphia Orchestra	31%	19%	48%	16%	24%
Delaware Theatre Company	26%	47%	12%	26%	15%
Delaware Center for the Contemporary Arts	16%	31%	7%	15%	9%
Delaware Symphony Orchestra	15%	26%	10%	15%	5%
OperaDelaware	11%	20%	7%	10%	3%
Christina Cultural Arts Center	11%	22%	5%	5%	7%
First State Ballet Theatre	7%	10%	5%	9%	2%

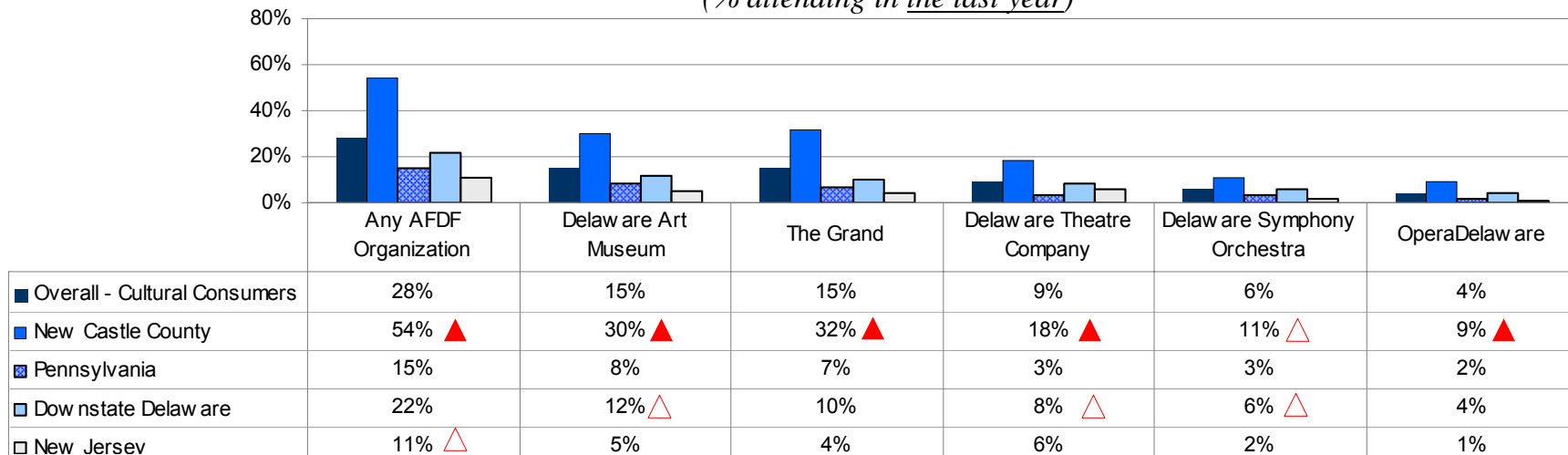
= AFDF Consortium organization

= statistically higher than one or more – but not all – sub-groups (p<.05)
 = statistically higher/lower than all other sub-groups (p<.05)

- In total, 51% of cultural consumers have attended at least one of the AFDF organizations in the past five years
- This is greatly influenced by region
 - New Castle residents are significantly more likely to attend these AFDF institutions
 - While PA and NJ residents are *least* likely to
- Additionally, 13% have attended culture in Wilmington but *not* AFDF
 - But 36% do not come to Wilmington arts at all
- Implications for AFDF:
 - AFDF’s overall untapped potential appears to be substantial: 49% of the region’s culturally-active population has *not* been to an AFDF institution in the past five years

Cultural Consumer Profile: Looking only in the past year, 28% of cultural consumers attended at least one AFDF organization

“How recently have you attended each organization?”
(% attending in the last year)



- AFDF organizations are particularly popular among *New Castle County's* culturally active community: over half report that they have been part of the AFDF audience in the last year
- In fact, Delaware residents attend AFDF organizations at higher rates than cultural consumers from all out-of-state regions do
 - This is even true of the regions that are geographically closer to Wilmington than most of downstate DE is
 - However, AFDF attendance among culturally-active Delaware residents is still moderate, overall
- Again, there are no major demographic differences between AFDF patrons and non-patrons
- Implications for AFDF:
 - Culture-goers in PA and NJ may feel that there are other, more easily accessible and/or more preferable arts options than Wilmington's offerings
 - Delaware residents are more attuned to the AFDF organizations, and not only because of geographic proximity; the "Delaware" name and focus of the organizations is source of a natural affiliation for them

Current Situation: AFDF Current Audience Profile

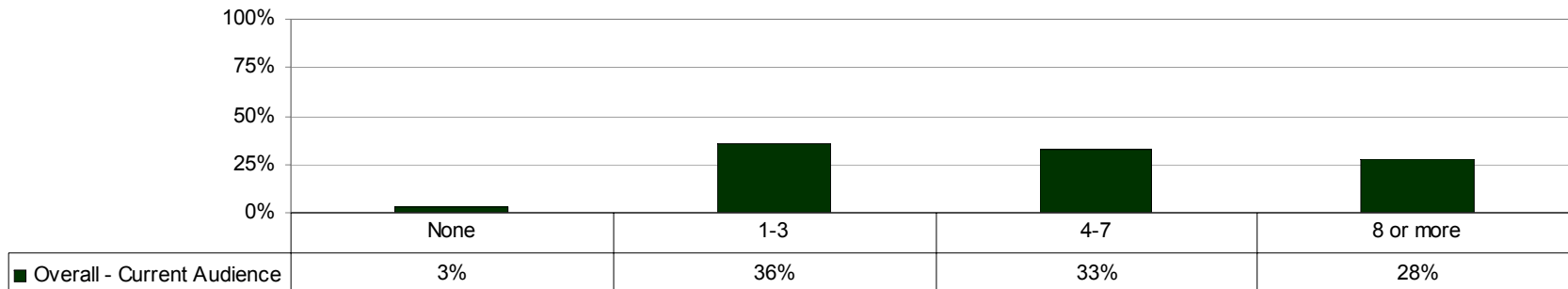
AFDF Current Audience Profile: Demographically, AFDF's current audience reflects the broader culturally-active community

	Current Audience Overall		Current Audience Overall
Gender	<i>n=1,938</i>	Income	<i>n=1,667</i>
Female	63%	Under \$25,000	4%
Male	37%	\$25,000-49,999	14%
Age	<i>n=1,951</i>	\$50,000-74,999	18%
Under 25	2%	\$75,000-99,999	19%
25-34	8%	\$100,000-149,999	25%
35-44	13%	\$150,000-199,999	10%
45-54	27%	\$200,000 or more	10%
55-64	28%	<i>Average income</i>	<i>\$103,563</i>
65-74	14%	Educational Attainment	<i>n=1,950</i>
75 or over	9%	High school/GED or less	4%
<i>Average age</i>	<i>54 years old</i>	Some college	14%
Kids under 18?	<i>n=1,941</i>	College degree	30%
Yes	24%	Some graduate work	11%
No	76%	Graduate/Post-graduate work	41%
Ethnicity*	<i>n=1,876</i>	Region**	<i>n=1,885</i>
Caucasian/White	91%	New Castle County	63%
African-American/Black	6%	Pennsylvania (<i>Chester and Delaware Counties</i>)	19%
Asian/Pacific Islander	1%	Downstate Delaware	5%
Native American	1%	New Jersey (<i>selected Gloucester and Salem County ZIPs</i>)	2%
Latino/Hispanic	1%	Other	11%
Other	2%		

- There are few demographic characteristics that distinguish the AFDF audience from other culturally-active people in the region
 - As is true of cultural consumers in general, the AFDF audience is older, wealthier, more highly-educated, and less ethnically diverse than the region as a whole
 - The one difference is that AFDF audience members are less likely to have young children at home than other cultural consumers are
- Implications for AFDF:
 - AFDF doesn't appear to be missing a particular demographic segment of cultural consumers in its audiences (see slide 15); growing the patron base will best be achieved by increasing penetration among the same demographic profile (vs. targeting any demographic sub-segments of the culturally-active population)
 - While AFDF organizations may not feel the pressure now to be more "family-friendly," it may be an opportunity for them to expand their audience base to include families

AFDF Current Audience Profile: In the last 6 months, the average AFDF audience member participated in 5 activities

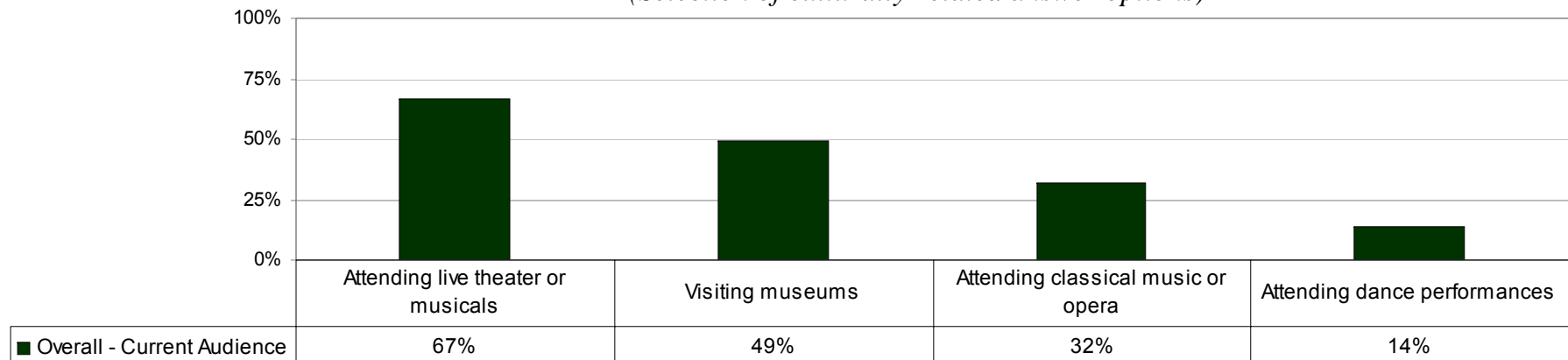
“In the past 6 months, how many arts or cultural activities or events have you attended or participated in?”



- AFDF’s current audience appears to be slightly more culturally active than cultural consumers in general
 - However, we cannot compare this directly to the cultural activity level of cultural consumers, due to the difference in time frame in question, as well as the issue of seasonality
 - While both surveys were fielded at similar times, the 6-month recall would have accounted for mostly summer months, when cultural participation may vary (both in amount and type)
- This is consistent with our finding that those cultural consumers who have attended at least one AFDF organization in the last year are more culturally active than those who have not
 - And, those who have attended multiple AFDF organizations in the past year also attend more arts and culture in general
 - On average, those attending multiple AFDF organizations attended 6 events in the past 6 months, compared to 5
- Implications for AFDF:
 - Because patrons who attend a single AFDF institution are less active in general, the consortium may have to work harder to convince them to increase and broaden their cultural diet

AFDF Current Audience Profile: Live theater is the most common cultural activity among AFDF audience, followed by museums

*“Which of the following entertainment or leisure-time activities do you participate in often?”
(Selection of culturally-related answer options)*



- Two-thirds of the AFDF audience attend live theater or musicals “often,” and about a half visit museums with the same general regularity
 - The popularity of live theatre and musicals is not related to the proportion of DTC patrons in our study
 - In fact, 60% of non-DTC patrons say that they attend live theater and musicals “often”
 - This pattern holds true for other cultural preferences as well
 - 37% of non-DAM patrons visit museums often, while 22% of non-DSO and 25% of non-OD patrons attend classical music or opera often
- Implications for AFDF:
 - The pattern above suggests that there is a great deal of new audience potential within the consortium’s overall patron base; to tap into audience crossover, AFDF institutions may not need to sell the categories as much as if non-users didn’t go at all, but those non-users may still need to be convinced about the specific organizations

AFDF Current Audience Profile: The Grand and Longwood welcome the largest proportions of the current AFDF audience

“How recently did you attend each of the following organizations?”
 (% attending in the past 5 years)

Arts and Cultural Organizations in and around Wilmington	Current Audience Overall
	n=1884-1971
→ The Grand Opera House (<i>other than for the Delaware Symphony or OperaDelaware</i>)	83%
Longwood Gardens	82%
Winterthur Museum & Country Estate	67%
→ Delaware Art Museum	63%
DuPont Theatre	59%
Hagley Museum	53%
→ Delaware Theatre Company	52%
Delaware Museum of Natural History	40%
→ Delaware Symphony Orchestra	36%
Delaware Center for the Contemporary Arts	31%
→ OperaDelaware	24%
Christina Cultural Arts Center	14%
First State Ballet Theatre	10%

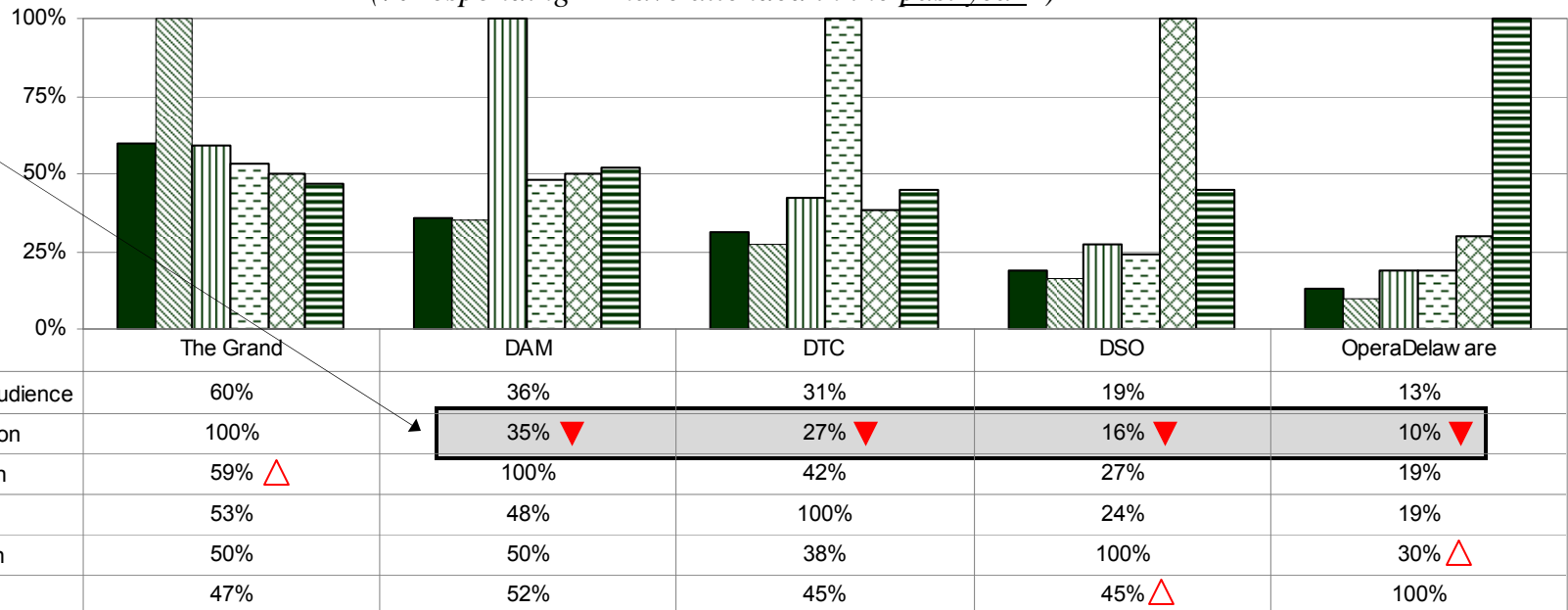
- Among the AFDF patron base, The Grand has the highest attendance, with 83% having attended in the past 5 years
 - The other consortium institutions have comparatively lower attendance from the AFDF pool, overall
- Implications for AFDF:
 - There is high crossover potential for AFDF institutions – though more so for OD, DSO, DTC, and DAM than for The Grand

These numbers are not directly comparable to percentages shown on slide 18, due to the make-up and definition of these two audiences.

AFDF Current Audience Profile: The Grand constitutes the largest share of the overall AFDF audience

“How recently did you attend each of the following organizations?”
 (% responding “I have attended in the past year”)

How to read this chart:
 These numbers here indicate the proportion of the current Grand audience that has also attended each other organization in the last year. (For instance 35% of Grand patrons are also DAM patrons.)



- Overall, 29% of the current audience has attended multiple AFDF institutions in the past year
- The Grand’s audience members are *least* likely to attend any of the other AFDF organizations
 - As we saw in the Phase 1 patron database analysis, crossover attendance between DSO and OperaDelaware is particularly high
- Implications for AFDF:
 - The Grand audience appears to have somewhat distinct cultural participation patterns compared to the rest of the consortium’s audiences. This indicates two possibilities: (1) there is significant room to encourage more crossover between patrons of the Grand and the others (since there is little of that now); and (2) even though room for crossover is high between these two camps, it is unlikely to be fruitful if patrons’ cultural preferences are very different from each other.

Current Situation:
Awareness of and Familiarity
with AFDF Organizations

AFDF Awareness: Cultural consumers most readily associate Winterthur and The Grand with Wilmington’s arts landscape

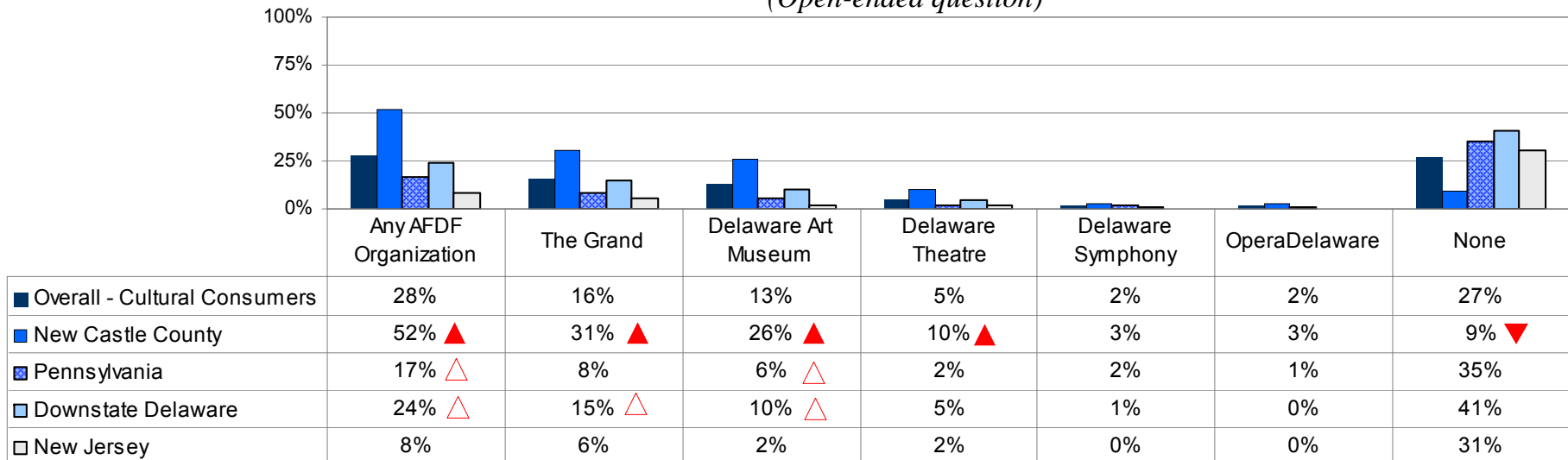
“When you think about specific arts or cultural institutions in the Wilmington area, which come to mind?”
(Open-ended question)

Unaided Awareness	Cultural Consumers Overall	Unaided Awareness	Cultural Consumers Overall
Winterthur	17%	Playhouse Theatre	4%
→ The Grand	16%	Franklin Institute	3%
Longwood Gardens	15%	Delaware Symphony Orchestra	2%
DuPont mentions (<i>Hotel, Museum*, general</i>)	14%	The Riverfront	2%
→ Delaware Art Museum	13%	OperaDelaware	2%
Hagley Museum	8%	Children’s Theatre	2%
Brandywine (<i>Zoo, general</i>)	7%	Philadelphia Orchestra/Kimmel Center	2%
Philadelphia Museum of Art	6%	Christina Cultural Arts Center	1%
Unnamed arts or cultural organization mentioned (theatre, opera, or orchestra, museum, etc.)	6%	None	27%
→ Delaware Theatre Company	5%	Other	31%
Delaware Museum of Natural History	5%		

- However, 27% weren’t able to list *any* arts or cultural institutions in the Wilmington area
- Among those who were able to answer this question, 28% mentioned at least one AFDF organization
 - 19% of the total mentioned an AFDF organization *first*, when responding to this question
- Implications for AFDF:
 - Among AFDF organizations, The Grand and DAM are highest among cultural consumers’ consideration set, but *all* Wilmington arts institutions could better market – and differentiate – themselves to have higher top-of-mind awareness among cultural consumers

AFDF Awareness: AFDF organizations are most top-of-mind for New Castle County culture-goers

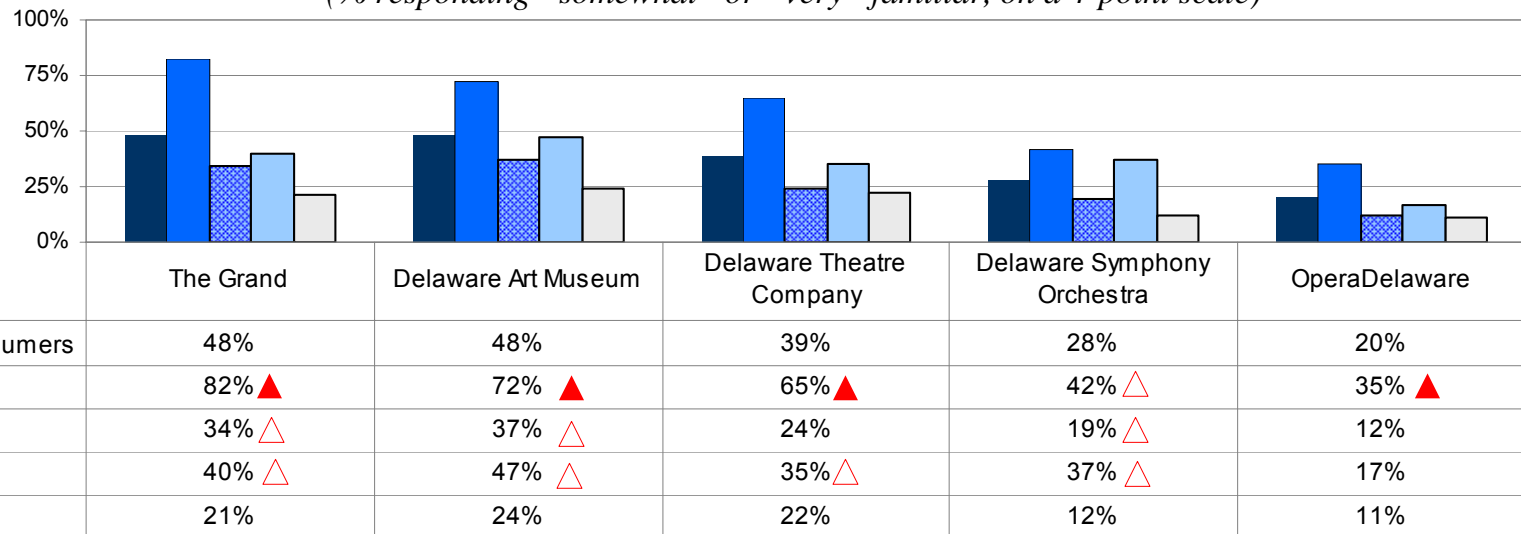
“When you think about specific arts or cultural institutions in the Wilmington area, which come to mind?”
(Open-ended question)



- New Castle respondents are, naturally, most familiar with Wilmington’s cultural offerings; only 9% couldn’t think of any
 - However, only about half of these New Castle respondents named an AFDF organization when asked about the area’s cultural offerings; we would have expected this to be much higher
- This story is different when considering other parts of Delaware: 41% of downstate cultural consumers couldn’t name any Wilmington arts institutions
 - But among those who could, awareness of AFDF institutions was slightly higher than in PA and NJ
- Implications for AFDF:
 - Many Wilmington arts organizations – including AFDF institutions – are not on many cultural consumers’ radars – particularly outside of New Castle County. While differentiating yourselves from other organizations is important, overall awareness is even more important.

AFDF Awareness: Overall, the region’s cultural consumers have moderate-to-low familiarity with AFDF institutions

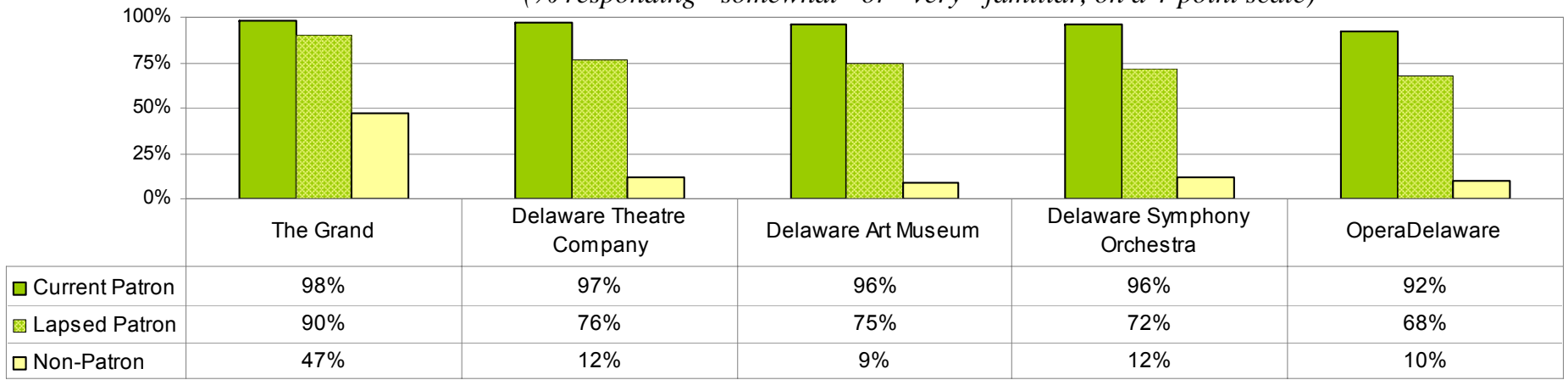
“How familiar do you consider yourself to be with the following organizations?”
 (% responding “somewhat” or “very” familiar, on a 4-point scale)



- Overall, cultural consumers are most familiar with The Grand and DAM, with just under half saying that they’re at least “somewhat” familiar with them
- As expected, New Castle respondents are most familiar with them, followed by downstate
 - PA culture-goers are generally more familiar with the institutions than cultural consumers from NJ
- Implications for AFDF:
 - There is notable room to increase cultural consumers’ level of familiarity with the consortium organizations. Since level of familiarity is related to one’s consideration of attending, increasing familiarity is required before increasing attendance can be expected.
 - It could be promising that awareness and familiarity *may* be a more significant barrier for these cultural consumers than knowing about the institutions and making a conscious decision to not attend.

AFDF Awareness: Looking within the AFDF audience base, patrons are most familiar with The Grand

*“How familiar do you consider yourself to be with the following organizations?”
(% responding “somewhat” or “very” familiar, on a 4-point scale)*



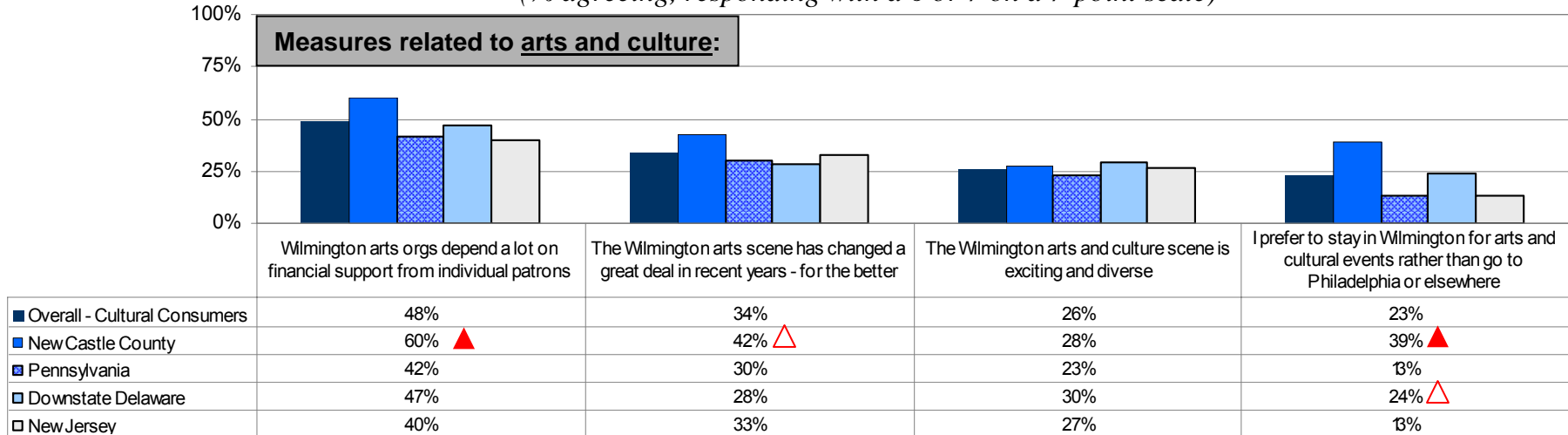
- In general, familiarity with the AFDF institutions is very low among people who have never attended that organization
 - The exception to this is The Grand: about half (47%) of the broader AFDF audience who have never attended The Grand say they are familiar with it – more than non-patrons of the other institutions
 - These familiarity levels among non-patrons are lower than one might expect from people culturally-active in Wilmington arts
- Implications for AFDF:
 - Even within the AFDF current audience, awareness levels of other AFDF organizations the respondents hadn't attended is low; this is another finding which points to the fact that consortium institutions could benefit greatly from cross-marketing efforts

Current Situation: Wilmington Brand Position

Wilmington Brand Position: Wilmington’s cultural “brand” shows room for improvement – particularly outside of New Castle

“Do you agree or disagree with each of the following statements?”
 (% agreeing, responding with a 6 or 7 on a 7-point scale)

Chart 1 of 2

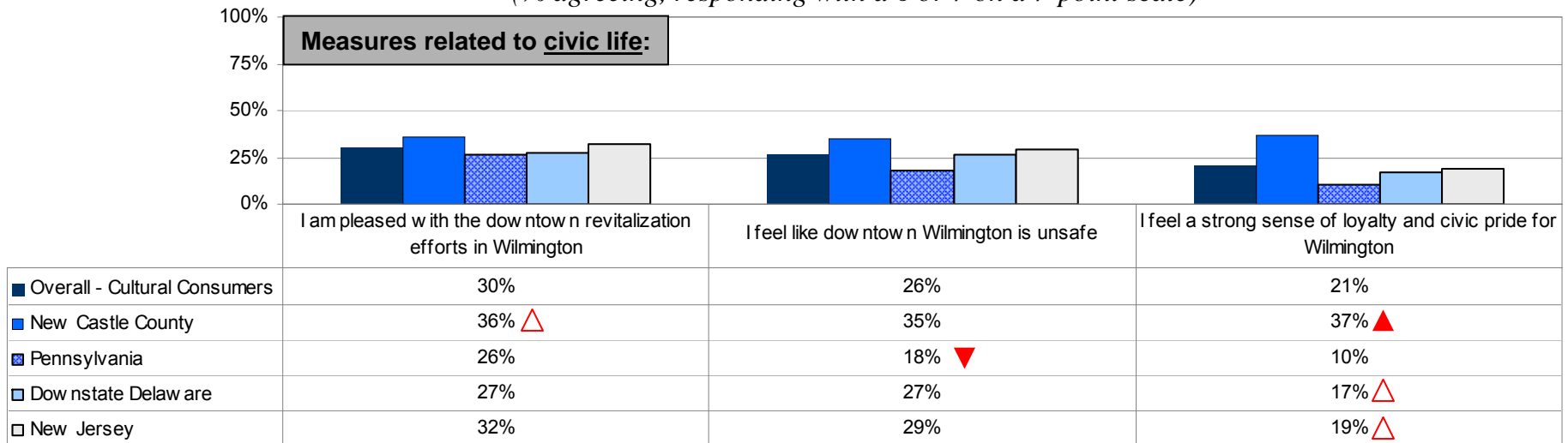


- Among cultural consumers, Wilmington’s brand position – particularly as an arts scene – is in need of improvement
 - Even in New Castle County, only 28% of cultural consumers describe the Wilmington arts scene as “exciting and diverse”
 - While more are willing to say that Wilmington’s arts scene has changed for the better in recent years, the overall low numbers here suggest that there is still a long way for Wilmington’s reputation to go
- Implications for AFDF:
 - This confirms a finding garnered from the Phase 1 Stakeholder Interviews, in that perceptions of the Wilmington arts scene are an important challenge facing all Wilmington cultural organizations (not just those in AFDF) and will need to be addressed as part of the consortium’s efforts

Wilmington Brand Position: Pride in Wilmington as a whole is also flagging

“Do you agree or disagree with the following statements:”
 (% agreeing, responding with a 6 or 7 on a 7-point scale)

Chart 2 of 2

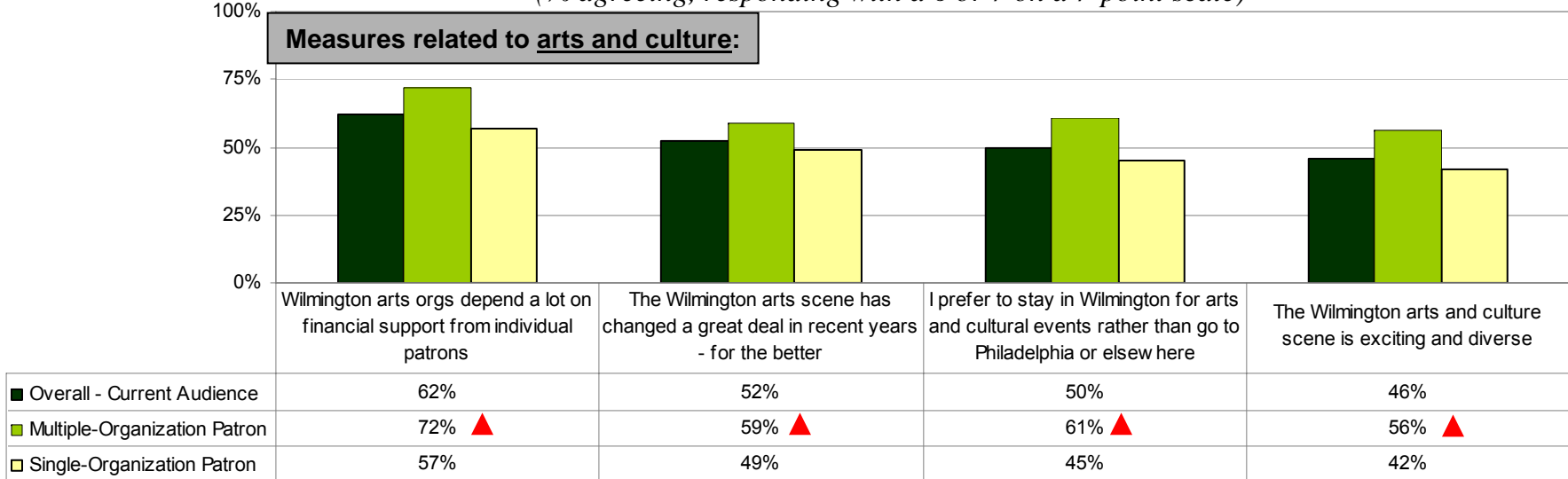


- Again, we see that although New Castle County residents are warmer towards Wilmington as a whole, there is still substantial room for Wilmington’s brand position to be stronger
- Wilmington’s safety is only a strong concern for a quarter of cultural consumers; while higher than would be ideal, it does not appear to be a strong barrier to cultural participation
 - Disagreement with this statement about Wilmington’s safety issue is almost equal to agreement with it (21%)
 - Further, AFDF’s current audiences report similar perspectives (see slide 36) – but they are clearly still attending culture within Wilmington
- Implications for AFDF:
 - Changing perceptions about Wilmington as a whole – particularly with respect to safety – should be much lower priority for AFDF than addressing perceptions of the Wilmington arts scene. This is good news for the consortium: it can tell a contained story about what Wilmington has to offer in terms of arts and culture, rather than convince the community that every aspect of Wilmington is desirable.

Wilmington Brand Position: The Wilmington arts scene has a more favorable impression among AFDF's current audience...

“Do you agree or disagree with the following statements:”
 (% agreeing, responding with a 6 or 7 on a 7-point scale)

Chart 1 of 2

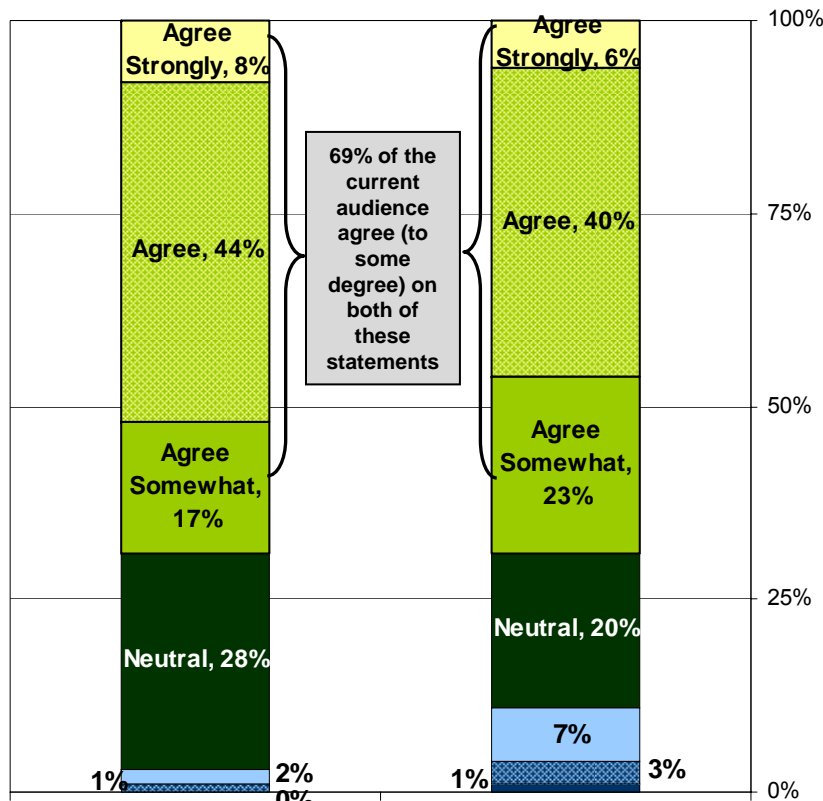


- ... particularly if audience members are current patrons of *more than one* AFDF organization
- However, overall agreement with these statements could certainly grow
- Implications for AFDF:
 - The more that someone is involved in the arts (i.e., attends multiple AFDF institutions), the more positively they feel about the arts in Wilmington as a whole
 - There are benefits to be had even among the current audience from a joint marketing effort designed to improve Wilmington's image as an arts and culture destination

Wilmington Brand Position: Resistance to the notion of Wilmington as an arts scene is not substantial

Current Audience:

Further Detail on Perceptions of Wilmington Arts Landscape



The Wilmington arts scene has changed a great deal in recent years - for the better

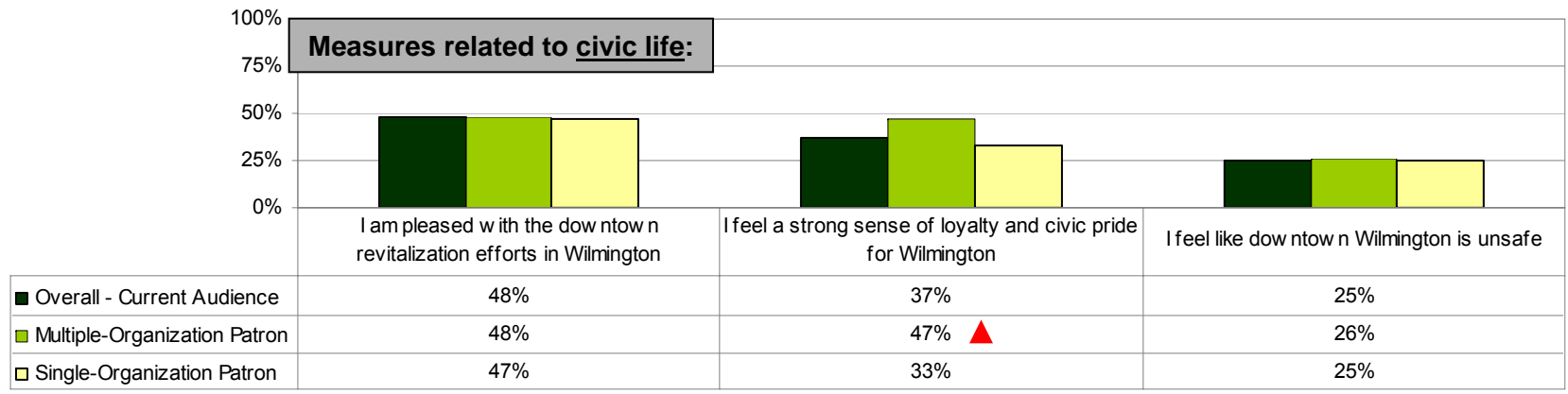
The Wilmington arts and cultural scene is exciting and diverse

- Although there is room for improvement in these measures, it is important to note that we do not see large numbers of respondents *disagreeing* with these statements
 - While the difference is slight, agreement that “the arts scene has changed” is stronger than agreement with the arts scene being “exciting and diverse”
- Implications for AFDF:
 - In efforts to improve perceptions of Wilmington and its cultural offerings, AFDF could emphasize the ways in which the arts landscape has changed – and continues to change. Confront these negative perceptions head-on by specifically addressing how these negative perceptions are out-dated.

Wilmington Brand Position: As with cultural consumers overall, the current audience has lukewarm civic pride in Wilmington

*“Do you agree or disagree with the following statements:”
 (% agreeing, responding with a 6 or 7 on a 7-point scale)*

Chart 2 of 2

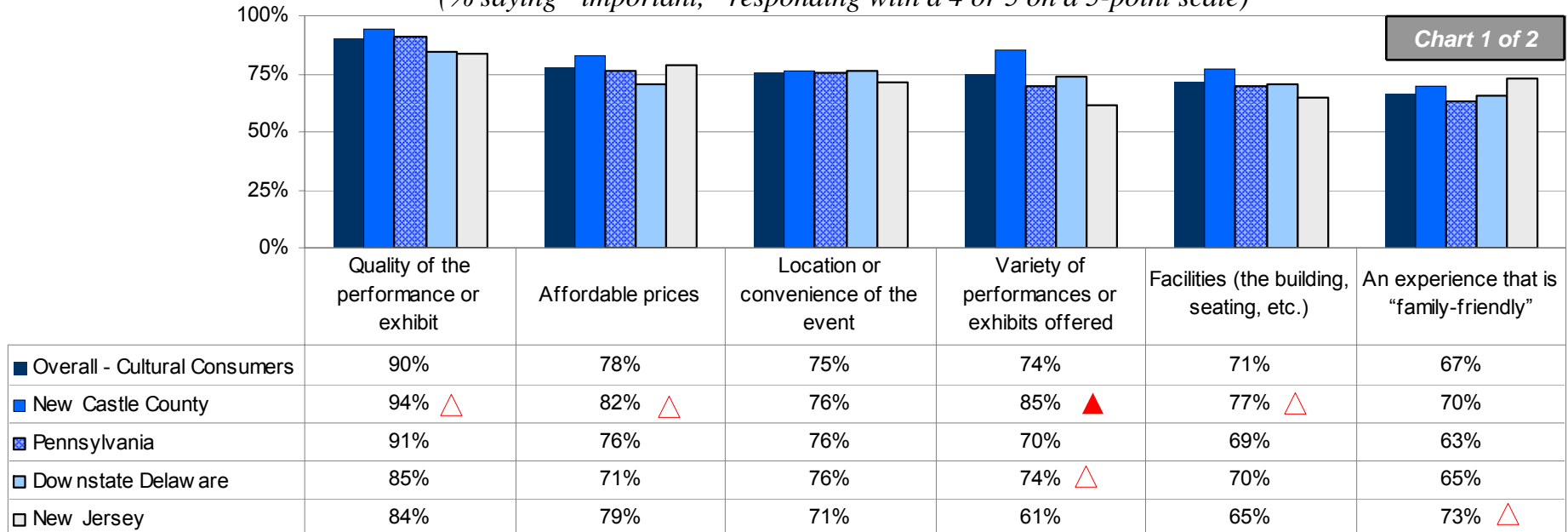


- Again, perceptions of Wilmington’s safety do not keep these patrons away from the city’s cultural institutions
 - This is further substantiated in slide 44
- Implications for AFDF:
 - The perceptions of Wilmington among current audience members provides further evidence that changing perceptions about Wilmington as a whole should be a much lower priority for AFDF than focusing on the growing vitality and value of the city’s cultural life

Opportunities: Decision Influences

Decision Influences: Cultural consumers are most concerned with the quality of the cultural events that they attend

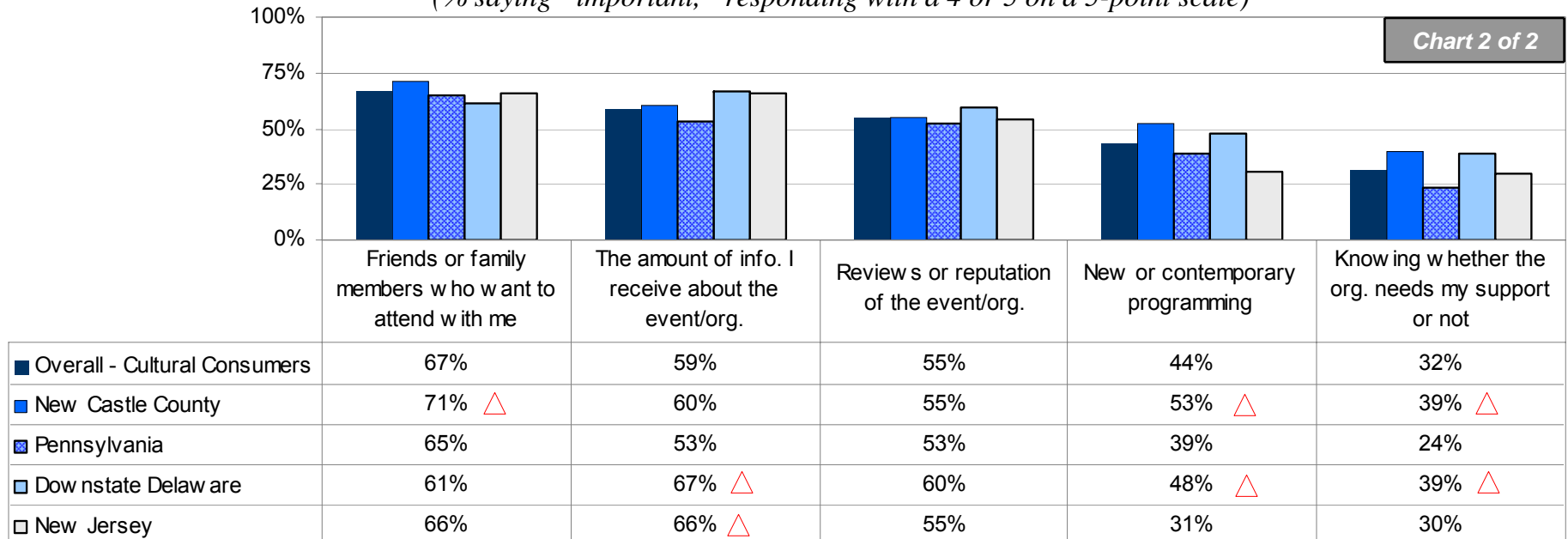
“How important to you are each of the following when deciding whether to attend an arts or cultural activity or event?”
 (% saying “important,” responding with a 4 or 5 on a 5-point scale)



- Most also consider the convenience of events’ price and location
- Younger cultural consumers are more focused on quality, price, and “family-friendliness” than older respondents
 - But the importance of family-friendliness does not differ by whether or not they have recently attended an AFDF organization; prioritizing family-friendliness is not leading potential audience members away from AFDF
- Implications for AFDF:
 - A high-quality experience is a necessary building-block in growing the audience – but it is not sufficient on its own: logistics must also meet the practical parameters that audience members have in mind
 - Location and convenience will be an asset to grow the AFDF audience within New Castle County; however, because that is equally important for cultural consumers in all regions, convenience could be a challenge to overcome in other regions

Decision Influences: Philanthropic considerations are not driving cultural attendance for much of the audience

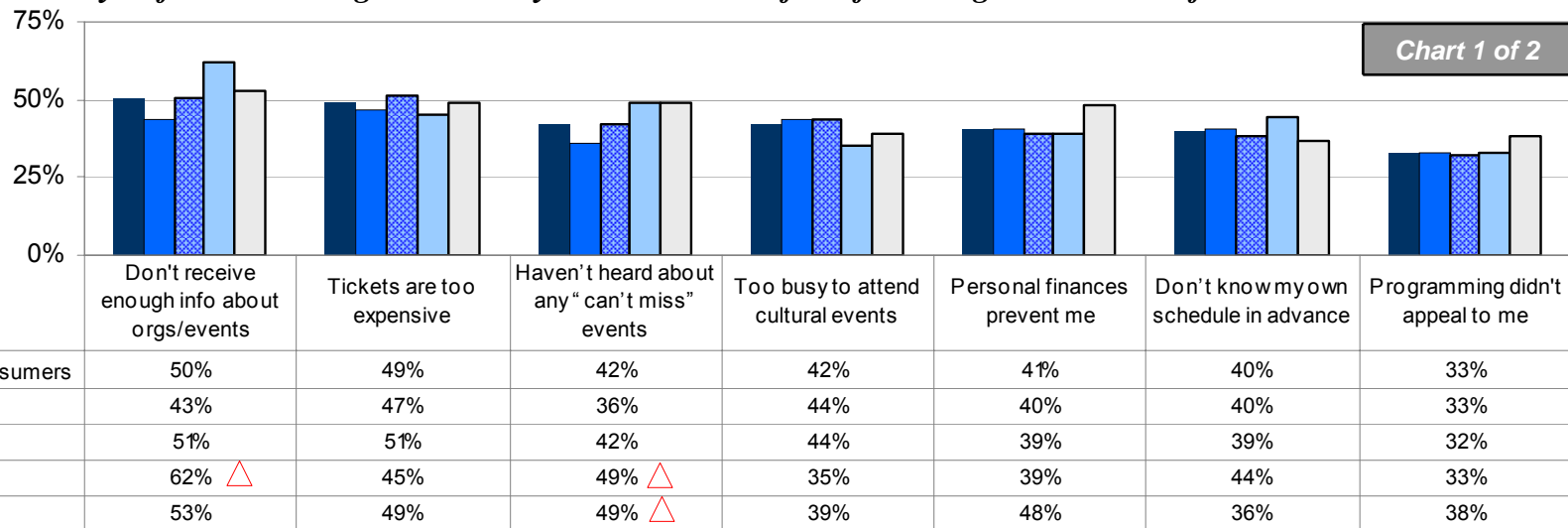
“How important to you are each of the following when deciding whether to attend an arts or cultural activity or event?”
 (% saying “important,” responding with a 4 or 5 on a 5-point scale)



- Delaware residents are paying *more* attention to the philanthropic needs of the organizations they attend, but this is still a lower-importance factor for them
 - But it is more important for recent AFDF patrons than for non-AFDF-patrons
- Receiving sufficient information is of greater importance for downstate and NJ cultural consumers, compared to other regions
 - This could act as a barrier to attendance; if these consumers are not receiving information about an organization, they may be unlikely to seek it out on their own
- Implications for AFDF:
 - Messaging focused on AFDF organizations’ financial “need” is not likely to be a salient motivator
 - To the degree that downstate DE and NJ *are* regional targets, ensure that the information flow to culture-goers in those areas is ample; they will be most influenced by communications they receive

Decision Influences: The biggest attendance barriers for cultural consumers are lack of information and ticket prices

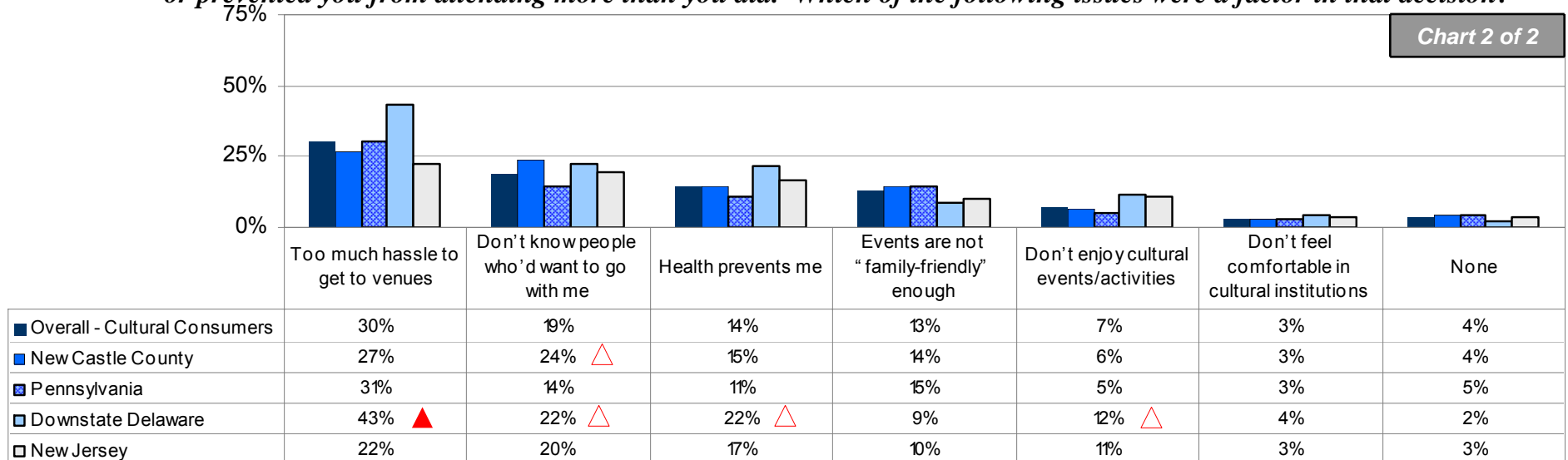
“Please think about what has prevented you, personally, from attending cultural events/activities in the past 12 months – or prevented you from attending more than you did. Which of the following issues were a factor in that decision?”



- However, there is not a clear consensus here: there is not a single barrier that is preventing cultural attendance for a substantial majority of cultural consumers
 - Potential investments into removing any one of these barriers should be weighed against the relatively low return that those investments may have; for instance, making a large investment into reducing ticket prices would likely net only a fraction of the potential audience
- That said, lack of information seems to be particularly strong for downstate respondents
 - Although receiving information drives cultural decision-making for downstate residents, its absence is a big reason that they aren't attending as often as they might
 - Moreover, lack of information does appear to be dampening cultural participation: those who cited either "I don't receive enough information" or "I haven't heard about any 'can't miss' events" participated in significantly fewer cultural events overall (than those who cited other barriers)
- Implications for AFDF:
 - This data suggests that concerted marketing efforts are critical to the success of AFDF organizations – whether done so jointly or individually

Decision Influences: The travel barrier is mild for most – but is more acute for downstate cultural consumers

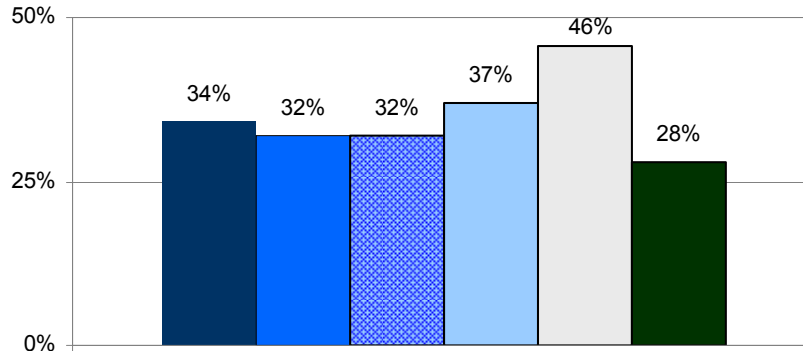
“Please think about what has prevented you, personally, from attending cultural events/activities in the past 12 months – or prevented you from attending more than you did. Which of the following issues were a factor in that decision?”



- In fact, downstate cultural consumers appear to respond more strongly to certain other barriers as well, namely:
 - Not having companions to attend with
 - Health issues
 - Milder enjoyment of cultural activities in general
 - However, with the exception of those who say that they don't enjoy cultural activities, these barriers do *not* appear to be limiting the level of cultural activity that downstate cultural consumers engage in overall
- Implications for AFDF:
 - AFDF institutions may have to work harder to convince downstate cultural attenders to drive to Wilmington – but as we've seen they do participate in Wilmington culture so there is potential

Decision Influences: Roughly one-third consider the economic downturn as a hindrance to cultural participation

*“Do you agree or disagree that:
the economic downturn has affected my participation in arts and culture?”*
(% agreeing, responding with a 4 or 5 on a 5-point scale)

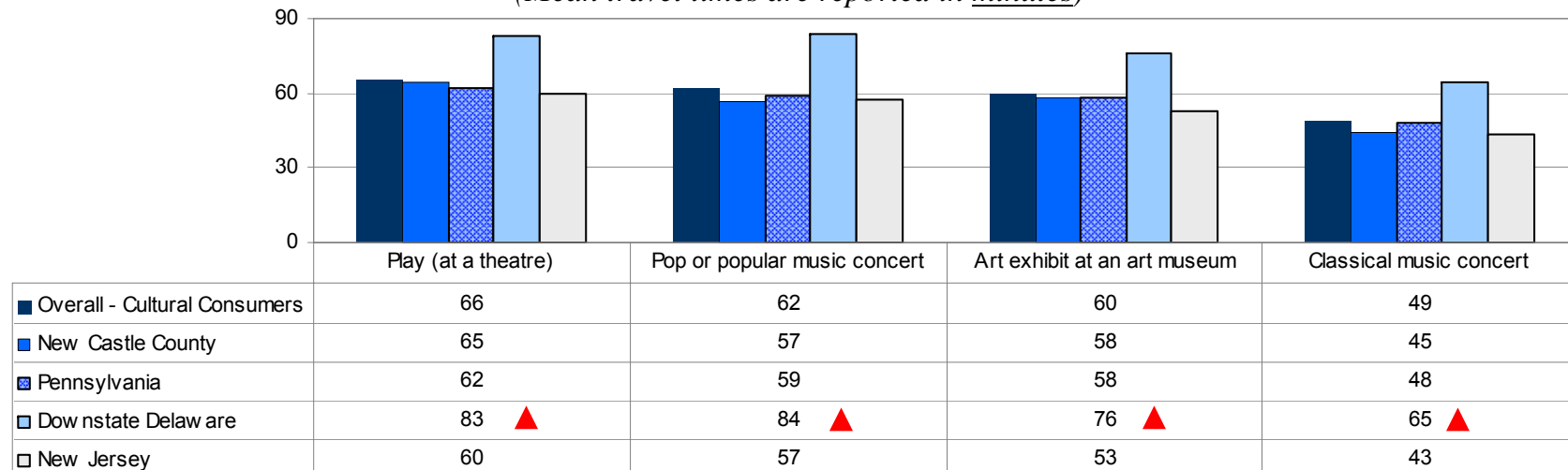


Overall - Cultural Consumers	34%
New Castle County	32%
Pennsylvania	32%
Downstate Delaware	37%
New Jersey	46% △
Overall - Current Audience	28%

- The current audience is slightly less concerned about the economic downturn than the broader cultural consumer population is
- New Jersey cultural consumers are most likely to feel that broader economic circumstances are playing a role in their cultural decision-making
 - We also found that New Jersey residents were most likely to cite personal finances as a barrier to cultural participation (though not to a statistically significant degree)
- Implications for AFDF:
 - While the economy is not the biggest challenge facing AFDF, it is an important component of the overall landscape facing the consortium; further, the perceived influence of this economic situation may only get stronger from here

Decision Influences: Cultural consumers are willing to travel about an hour for an appealing arts experience

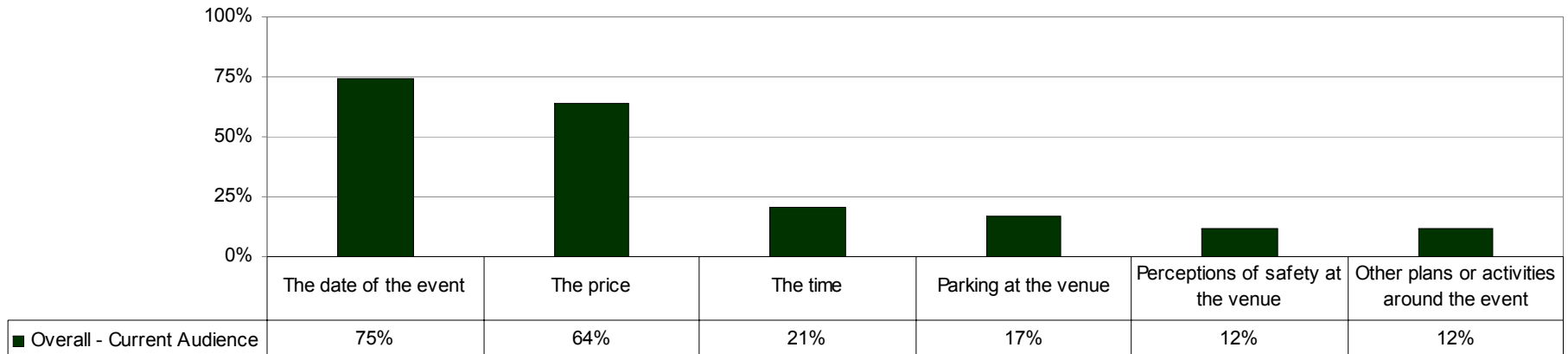
“Suppose a friend whose opinion you trust recommended a _____. How far would you be willing to travel to see it?”
(Mean travel times are reported in minutes)



- Classical music is the notable exception – the average cultural consumer is willing to travel 49 minutes for a “must-see” classical music concert
 - This likely reflects the fact that, as a whole, cultural consumers attend classical music concerts less frequently than they attend live theater or visit museums (see slide 17); those who *do* attend classical music concerts on a regular basis are willing to travel 63 minutes for an appealing concert
- Downstate cultural consumers are willing to travel the furthest
 - Even though travel hassles are an important potential barrier for downstate cultural consumers, they are accustomed to traveling further than others in order to take in arts and culture events
- Implications for AFDF:
 - Downstate residents do exhibit a willingness to travel substantial distances to participate in culture – when they believe that the experience will be worth their trouble
 - The high potential areas of PA appear to be within a reasonable geographic range for them (since they are within an hour’s drive); their perceptions of Wilmington and its proximity to other arts offerings have a greater impact on their decision to attend than distance does

Decision Influences: Once they are part of the audience, patrons choose events along narrow margins

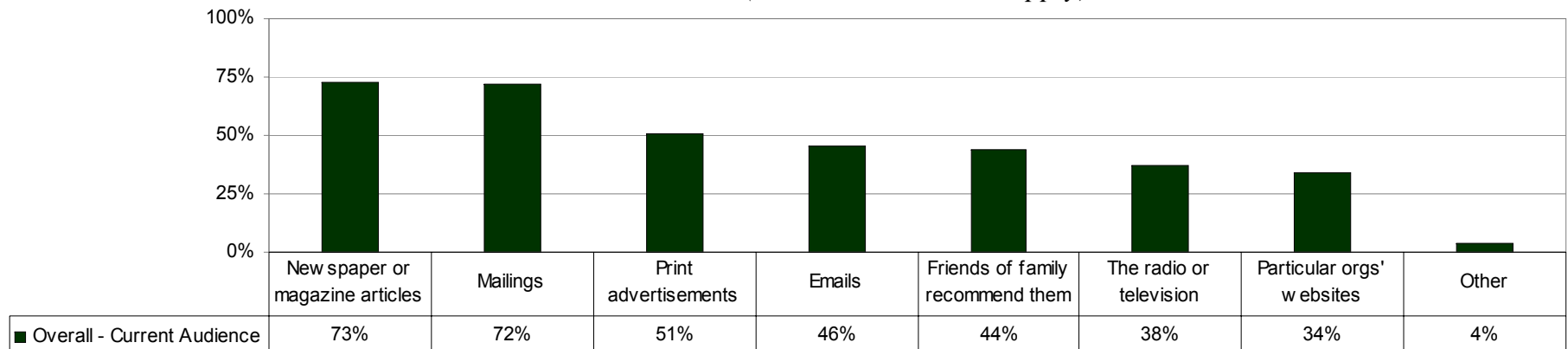
“Out of the options listed below, which TWO are the most important to your decision to attend an arts or cultural activity or event?”



- The current audience is looking primarily at dates and prices when selecting which particular events or performances to attend
 - They are not particularly attuned to the whole “package” surrounding the event that they pick – parking, safety, and other activities
- Implications for AFDF:
 - AFDF organizations need to preserve variety and flexibility in their pricing and scheduling options, but should not be very concerned about offering the audience lots of add-ons with their tickets

Decision Influences: Traditional mailings reach nearly three-quarters of the current AFDF audience

*“How do you typically hear about arts and cultural events?”
(Please select all that apply)*



- Newspaper and magazines are also a cultural resource for about three-quarters of AFDF’s audience
- Sources of information used are sharply different for younger versus older audiences
 - Younger audiences are more likely to use email (52% for those under 45 compared to 31% for those over 65), word of mouth (54% compared to 44%), and websites (51% compared to 14%) to learn about cultural events
 - Older audiences rely on traditional sources: mailings (84% for those over 65 compared to 55% for those under 45) and print advertising (52% compared to 39%)
- Implications for AFDF:
 - Marketing plans need to include many modes of communication to reach audience segments across the age distribution
 - Communicating to cultural consumers through local newspapers about the AFDF consortium and its goals for revitalizing Wilmington’s (and Delaware’s) arts landscape could engender support for this mission, and in turn raise awareness and interest in the institutions themselves

Opportunities:
High-Potential Audience
Growth Opportunities

High-Potential Growth Opportunities: Slover Linett Strategies created a model to identify audience segments of highest potential

- As in the Phase 1 Report, we use multivariate techniques to identify audience segments with high potential for audience growth
 - In Phase 1, we identified the salient demographic predictors of the number of ticket buyers in each ZIP code in the broad Wilmington community
 - In Phase 2, we identify the salient attitudinal and behavioral predictors of recent AFDF attendance (within the past year) among cultural consumers
 - We model these predictors using logistic regression analysis
- This model provides rich information about the attitudinal segments that are likely to attend AFDF organizations ...
- ... but the subsequent demographic and geographic profiling techniques are necessary to “find” non-patrons whose attitudes and behaviors pre-dispose them to attending AFDF organizations

High-Potential Growth Opportunities: Having an active and wide-ranging cultural attendance profile predicts AFDF attendance

- Our model predicts that the profile of likely AFDF attendees is characterized by:
 - Being highly culturally-active and frequent participants in many forms of cultural/leisure activity (including dance, live theater, museums, and going to parks)
 - Having a taste for programming that is both varied and contemporary
 - Being focused on the philanthropic needs of the organizations they attend
- Unlikely AFDF attendees are characterized by:
 - Needing a lot of information about an event – including media reviews and personal testimonials from friends or family that an event can't be missed – to be persuaded to attend
 - Attending zoos and aquariums more frequently than other cultural consumers

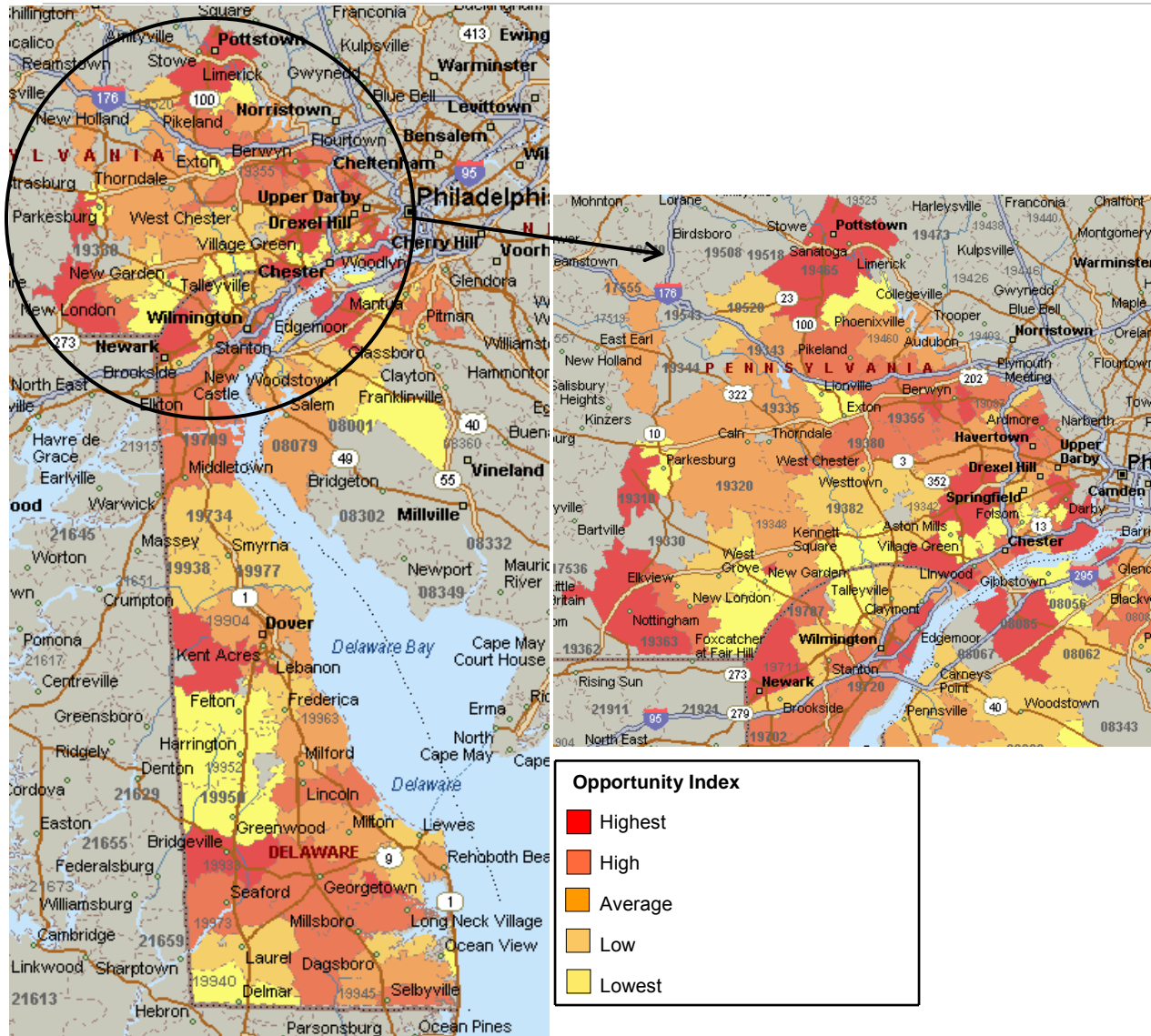
High-Potential Growth Opportunities: Profiles show that AFDF is already tapping into high potential *demographic* segments

- We use our model to estimate non-patrons' likelihood of attending AFDF organizations on the basis of their attitudinal and behavioral profile
- We then profile the demographics of the non-patrons with the highest estimated likelihood of attending AFDF
 - We looked at the top 25% according to their estimated likelihood of attendance
- Demographically, these high-potential audience members are very similar to the current AFDF audience
 - This confirms that there is not a particular demographic segment which AFDF should be trying to tap into; AFDF's best opportunity is to increase its penetration among the demographic groups that are already represented in the current audience

High-Potential Growth Opportunities: But *geographic* profiling does identify particular high opportunity ZIP codes

- We compute the average likelihood of attendance among non-patrons in each ZIP code in Delaware, Chester, and Delaware Counties in Pennsylvania, and selected areas in New Jersey
- We then map the opportunity in each ZIP code
- We find that there are high-potential growth opportunities throughout the region, with a particularly large number in Pennsylvania

High-Potential Growth Opportunities: High-potential areas are dispersed throughout the region



- Highest opportunity ZIP codes are found in all 4 regions, with the greatest number in Pennsylvania
 - Although New Jersey continues to appear lower-priority as a region, there are a few ZIP codes that should be considered high-priority targets
- It is notable that New Castle County has a number of high opportunity areas – although much of the potential audience in New Castle County already attends AFDF, there are still opportunities to grow the Wilmington-area audience

High-Potential Growth Opportunities: High-opportunity population centers: Pottstown, PA; Newark, DE; and Lansdowne, PA

<u>Zip code</u>	<u>Location</u>	<u>Population</u>
19801	Wilmington, DE	15,484
19022	Crum Lynne, PA	3,906
19933	Bridgeville, DE	6,694
19953	Hartly, DE	4,218
19951	Harbeson, DE	973
08086	Thorofare, NJ	5,424
19310	Atglen, PA	2,906
19153	Philadelphia, PA	12,324
19041	Haverford, PA	6,652
19333	Devon, PA	7,408
19711	Newark, DE	55,760
19464	Pottstown, PA	42,241
19465	Pottstown, PA	14,027
08038	Hancocks Bridge, NJ	282
19050	Lansdowne, PA	28,744

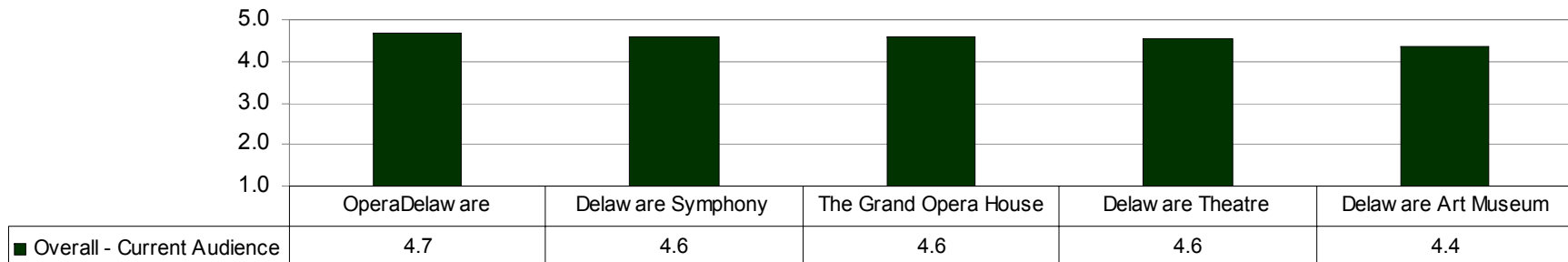
<u>Zip code</u>	<u>Location</u>	<u>Population</u>
08085	Swedesboro, NJ	10,703
19063	Media, PA	37,327
19809	Wilmington, DE	14,586
19934	Camden Wyoming, DE	9,573
19301	Paoli, PA	6,804
19076	Prospect Park, PA	6,665
19023	Darby, PA	21,404
19374	Toughkenamon, PA	1,181
19363	Oxford, PA	13,340
19061	Marcus Hook, PA	27,365

Opportunities:
Increasing Repeat
Engagement

Increasing Repeat Engagement: Those currently attending AFDF organizations are happy with their experience

*“How would you rate your overall satisfaction with these five organizations?”
(Mean satisfaction on a 5-point scale where 1 is “poor” and 5 is “excellent”)*

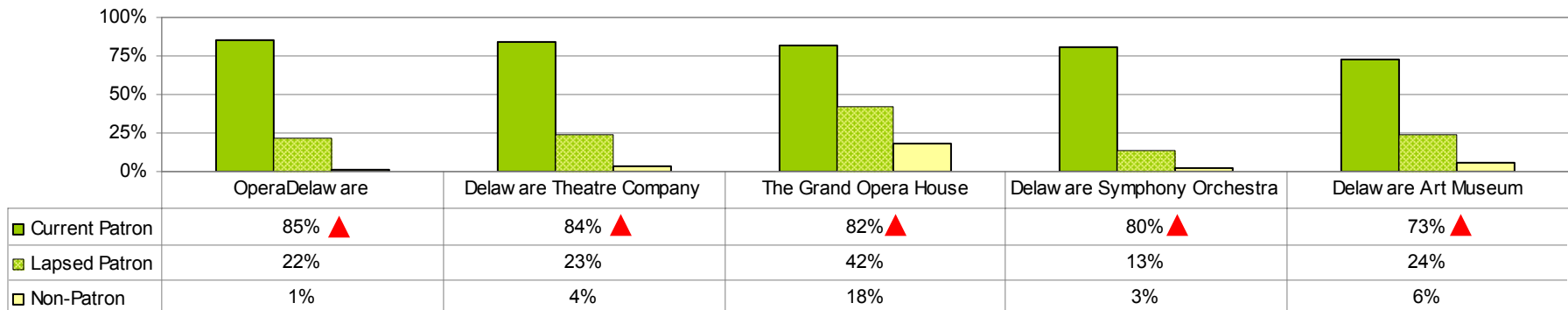
Among those who have attended the organization in the last year



- None of these ratings suggest that any organization is failing to deliver a satisfactory experience to those who are currently attending
 - The OperaDelaware audience is particularly satisfied with their experience – with an average satisfaction rating of 4.7 out of 5
- For all organizations, satisfaction ratings are significantly lower for those whose last visit was more than a year ago
 - This is to be expected: lapsed patrons typically report having a less satisfactory experience than current patrons
- Implications for AFDF:
 - This confirms the supposition from Phase 1 that AFDF’s high-priority challenges do not include improving the visitor/audience experience; the audience is satisfied, so AFDF should focus on increasing repeat visitation among these patrons
 - As part of this, it will be important to reach out to lapsed patrons and encourage them to give your organization another try

Increasing Repeat Engagement: However, many are reluctant to visit organizations other than those they are currently attending

*“How likely are you to attend each organization in the next 6 months?”
 (% saying “likely to attend,” responding with a 4 or 5 on a 5-point scale)*

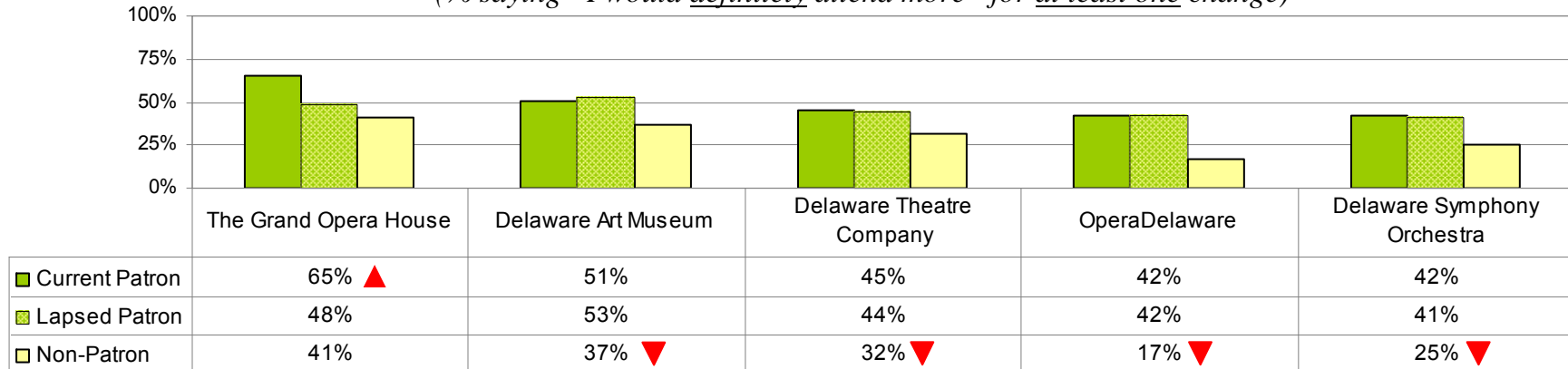


- Large majorities of those who have attended each organization in the last year anticipate attending again within 6 months
 - This is consistent with the finding that current audiences are happy with their experience
- However, very few anticipate attending an organization that they’ve never been to
 - This is despite the fact that many non-patrons are interested in the performance format in general – that is, many DTC non-patrons are interested in attending live theater in general, but don’t anticipate attending DTC in particular We also see that lapsed patrons report relatively low likelihood of returning to an organization that they haven’t been to recently
- Implications for AFDF:
 - This suggests two critical objectives for AFDF organizations when it comes to the current audience:
 1. Encourage patrons of *other* AFDF organizations, but not your own, to give you a try
 - Sharing resources – even more than you currently do – will be key to leverage the consortium
 2. Encourage lapsed patrons to return
 - This may be something that each organization needs to tackle individually

Increasing Repeat Engagement: There are specific changes that would entice some – but by no means all – to attend more

“To what degree would the following changes make it more likely for you to attend each organization in the future?”

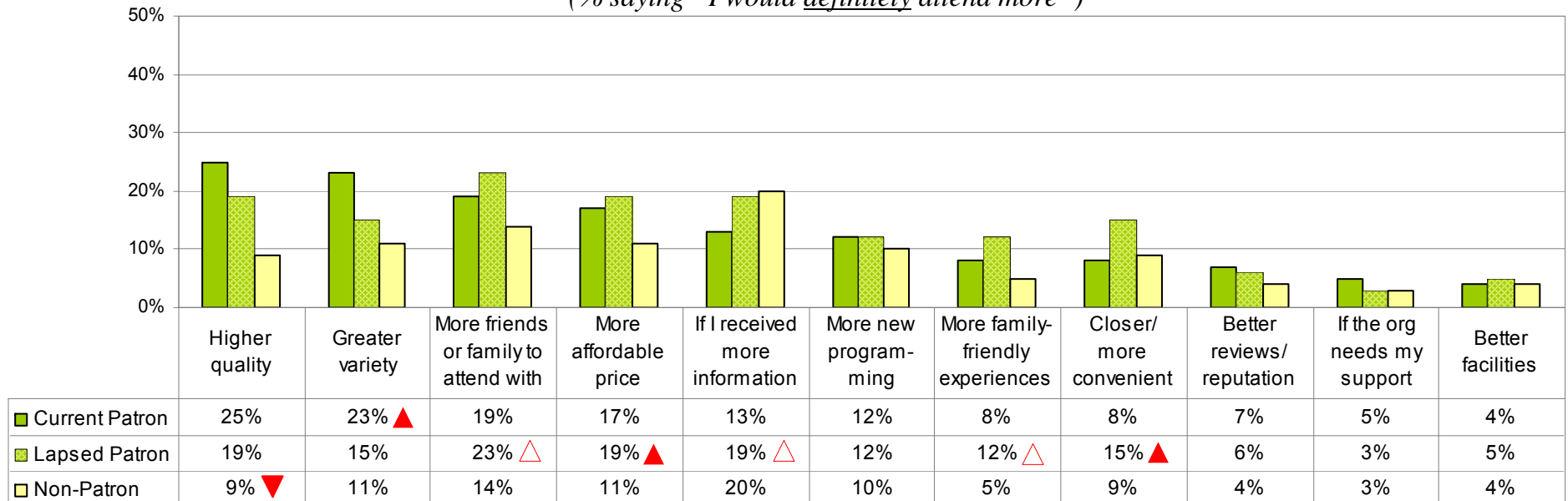
(% saying “I would definitely attend more” for at least one change)



- In the next five pages, we show the proportion of respondents who would attend each organization more if particular changes (e.g., higher quality performances/exhibits, more affordable prices) were made
 - We find that there is no consensus on what changes should be made in order to increase repeat engagement among current patrons or to encourage return or new attendance among lapsed or non-patrons
- Implications for AFDF:
 - This chart substantiates that there are substantial segments of each audience who would be unwilling to attend more under any circumstances

Increasing Repeat Engagement: DAM patrons want higher quality of and greater variety in programming

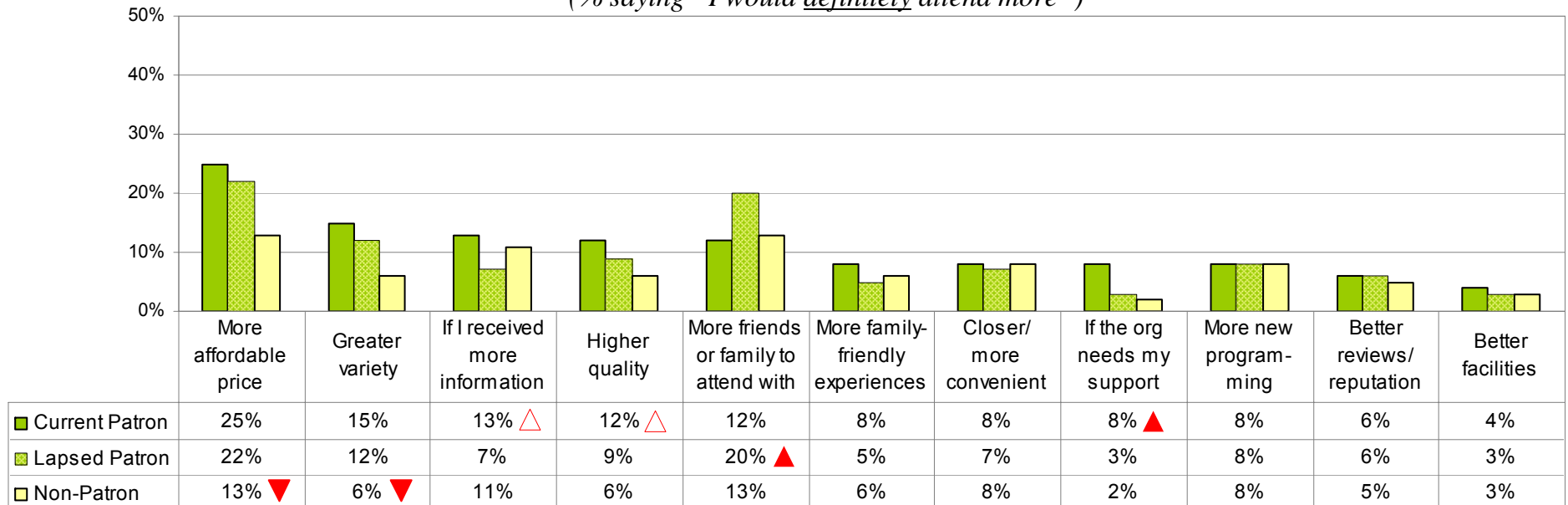
*“To what degree would each of the following make it more likely for you to attend Delaware Art Museum in the future?”
 (% saying “I would definitely attend more”)*



- Receiving more information is most commonly cited by DAM non-patrons as a change that would make them more likely to attend DAM in the future; it is the second-most commonly cited factor among lapsed patrons
- Lapsed patrons are also particularly sensitive to the social context – or lack thereof – of their visit, wishing that they had more friends and family willing to attend with them
- Implications for DAM:
 - Investing in marketing and communications materials will also likely entice lapsed and non-patrons to visit
 - Explore opportunities to either make group visitation more convenient and appealing (e.g. group discounts, personalized group tours) or connect potential visitors with other DAM visitors who share their interests

Increasing Repeat Engagement: All groups would be encouraged to attend DSO more if they felt prices were more affordable

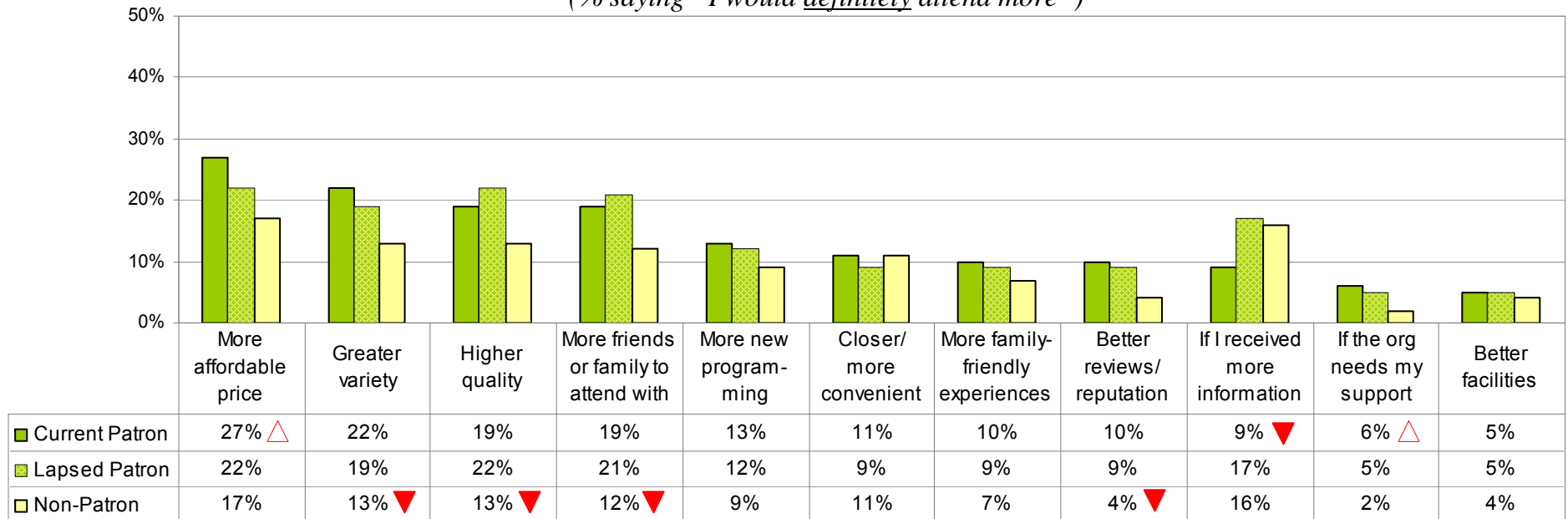
“To what degree would each of the following make it more likely for you to attend Delaware Symphony Orchestra in the future?”
 (% saying “I would definitely attend more”)



- Lapsed and non-patrons also say that they would be more willing to attend if they had a social network willing to attend with them
- Implications for DSO:
 - Offering special discounts to lapsed or non-patrons may be effective at encouraging more attendance from among the AFDF patron pool
 - DSO may also need to monitor whether current patrons are cutting back on their attendance because of price concerns – particularly in the current economic climate
 - Explore opportunities to either make group attendance more convenient (e.g. group discounts) or connect potential audience members with other DSO patrons who share their interests

Increasing Repeat Engagement: DTC patrons say they would attend more if prices were lower – as do lapsed and non-patrons

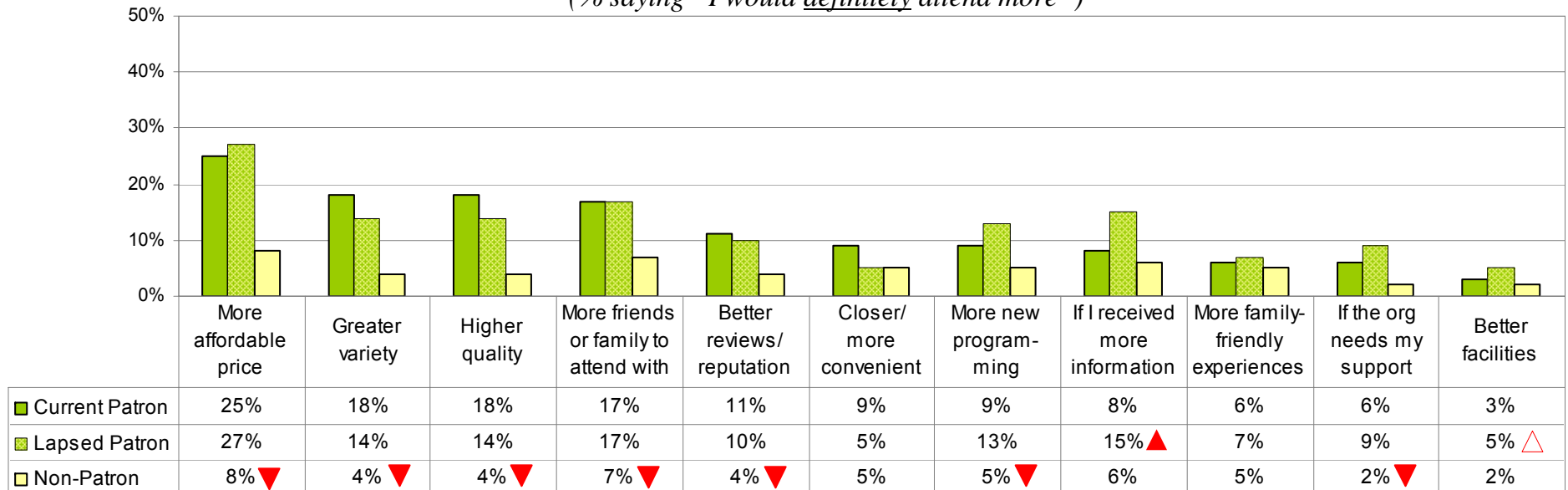
“To what degree would each of the following make it more likely for you to attend Delaware Theatre Company in the future?”
 (% saying “I would definitely attend more”)



- Lapsed patrons also say that higher quality performances would encourage them to attend DTC more
 - Satisfaction ratings among lapsed patrons do not indicate that dissatisfaction with the quality of their experience was a bigger concern for DTC lapsed patrons than for lapsed patrons of other organizations...
- Implications for DTC:
 - ...however, it may be worth conducting more research among current and lapsed patrons to determine whether DTC is *not* delivering on quality for a particular segment of the audience

Increasing Repeat Engagement: Current and lapsed patrons of OperaDelaware cite more affordable prices as a motivator

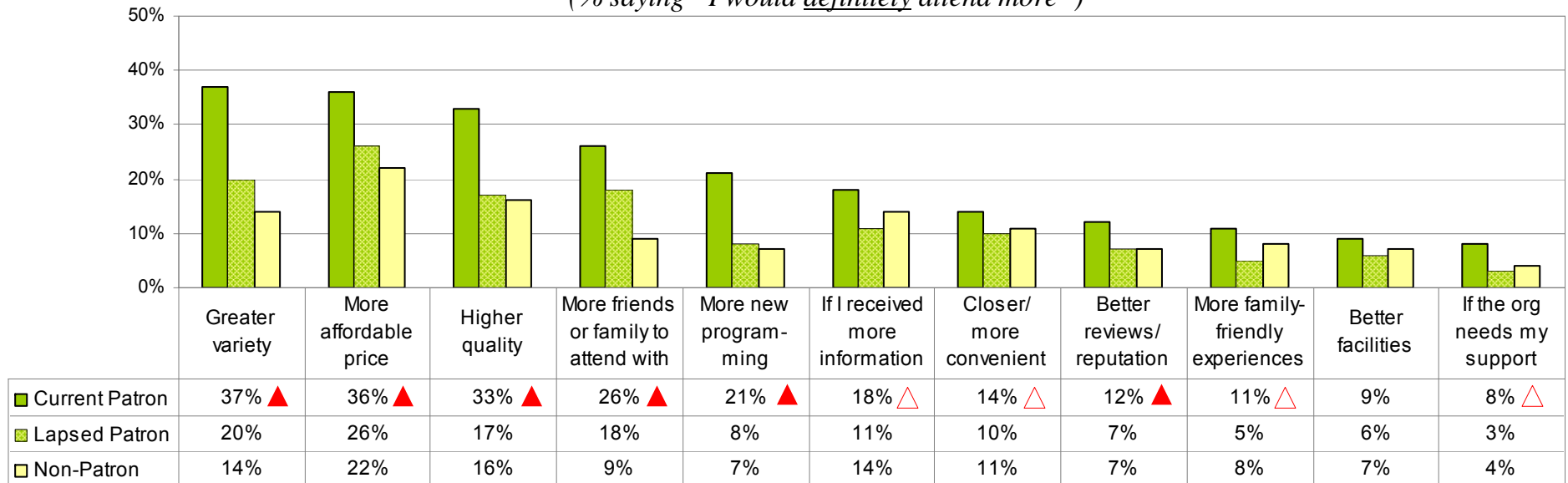
“To what degree would each of the following make it more likely for you to attend OperaDelaware in the future?”
 (% saying “I would definitely attend more”)



- Few non-patrons find any one change to be a compelling reason to start attending OperaDelaware
 - This is consistent with the low (1%) rate of anticipated future visitation among OperaDelaware non-patrons
- Implications for OD:
 - It may be best for OperaDelaware to try to encourage repeat attendance among its current patrons as a primary strategy, rather than focusing on attracting many more new patrons

Increasing Repeat Engagement: In general, there is higher interest in attending The Grand compared to the other organizations

“To what degree would each of the following make it more likely for you to attend The Grand in the future?”
 (% saying “I would definitely attend more”)

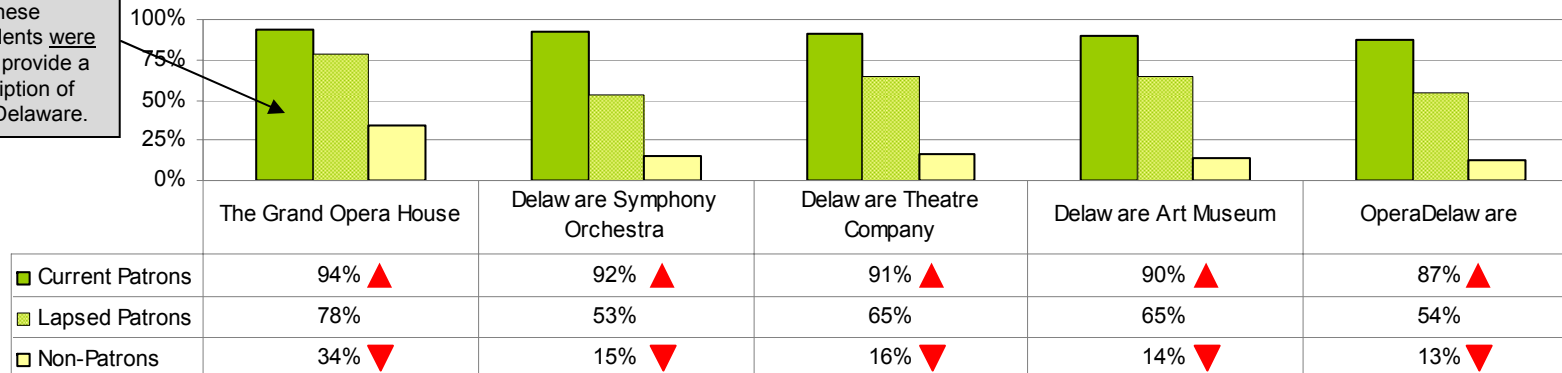


- All three groups suggest that they would be quite responsive to greater variety of and higher quality in The Grand’s programming, as well as more affordable pricing
 - Non-patrons also show a willingness to attend more if they received more information about The Grand
- The Grand’s current and lapsed patrons – as well as non-patrons – reported a much higher likelihood of visiting The Grand within the next 6 months than lapsed and non-patrons of other organizations did
- Implications for The Grand:
 - Because likelihood to visit appears strong, The Grand may be able to encourage new or return visitation with less effort
 - Ramping up communications to non-patrons is a straightforward way to capitalize on their willingness to attend – particularly if those communications touch on other factors important to this group: price, quality, and variety

Increasing Repeat Engagement: All organizations show room to improve brand definition outside their current audience

“For each description below, please check as many organizations as you feel the phrase applies to, if any.”
 (% providing any description)

How to read this chart:
 These respondents were able to provide a description of OperaDelaware.



- We asked the current audience to select the attributes that best fit each of the AFDF organizations; we interpret the proportion able to provide any description as a rough measure of how strongly defined the organization’s brand is
- For each organization, its brand is strongly defined among those who have attended within the last year ...
- ... but only moderately defined among lapsed patrons and virtually undefined among those who have never attended
 - The Grand brand is substantially better defined among its lapsed patrons and non-patrons than other brands are; but, it still shows considerable room to improve among its non-patrons in particular
- Implications for AFDF:
 - Brand definition among all AFDF institutions could be clarified – particularly for those who have never attended before (and thus are least likely to do so in the future without greater reason to)

Note: Only data from the Current Audience study is shown here. Results from the Community study are similar.

Increasing Repeat Engagement: All AFDF institutions do well on the top 5 attributes among those who have recently attended

*“How would you describe... (each of the following organizations)”
 (% of current patrons at each organization providing any description)*

Among AFDF Current Audience	Delaware Art Museum	Delaware Symphony Orchestra	Delaware Theatre Company	The Grand	OperaDelaware
Open, inviting, and welcoming	86%	79%	87%	90%	79%
Helpful, friendly staff	82%	72%	88%	88%	77%
Entertaining and enjoyable	77%	86%	88%	92%	88%
Is for someone like me	73%	77%	81%	87%	77%
Consistently high-quality	56%	77%	67%	71%	69%
Family-friendly	56%	37%	41%	50%	34%
A star attraction in Wilmington	52%	69%	61%	81%	62%
Fun and informal	52%	27%	57%	60%	24%
Always has something new	41%	35%	53%	59%	30%
A special, one-of-a-kind experience	31%	35%	46%	55%	43%

- There are a few attributes that patrons thought were distinctive to certain AFDF institutions
 - More patrons feel that The Grand and DTC are thought to “always have something new,” compared to the other institutions
 - “Fun and informal” were not words that many said were appropriate for DSO or OD (though that could certainly be related to perceptions of the category of classical music as well, not only the institutions)
 - DAM is thought to be the most family-friendly of the AFDF institutions
- Implications for AFDF:
 - In addition to brand awareness, the institutions’ brand definition could be improved as well – using these perceptions as a jumping-off point for the organizations to either further solidify, or to change

Recommended Strategies & Next Steps

Recommended Strategies: There are four key strategies that will take the AFDF consortium towards its goals

- Our data and analysis has uncovered some of the key agents influencing the size and make-up of AFDF institutions' patron base
- This analysis identified at least four key strategies that the consortium must take to increase the size – and repeat engagement – of its audiences
 - A deeper understanding can be gained from the upcoming qualitative research...
 - ...which will be paired with the following strategic process aimed at marrying our new body of knowledge with the ideas, missions, and capacities of the consortium (as well as those of each individual institution)

Strategy #1: Encourage and facilitate greater crossover attendance among AFDF patrons

Strategy #2: Increase awareness and interest in AFDF institutions among new audiences

Strategy #3: Develop distinct strategies for each of the geographic target regions

Strategy #4: Improve the Wilmington “brand” and perceptions of its cultural landscape

Recommended Strategies: There are four key strategies that will take the AFDF consortium towards its goals (cont.)

- **Strategy #1: Encourage and facilitate greater crossover among AFDF patrons**
 - Rationale: Encouraging greater cross-attendance among current AFDF patrons is likely the most efficient way to bring in new audiences to each of the five institutions. The consortium has a pool of well-defined and reachable patrons who are already active in Wilmington arts, so a strategic and concerted effort to introduce them to *more* of the city's cultural offerings could yield the greatest return.

- **Strategy #2: Increase awareness and interest in AFDF institutions among new audiences**
 - Rationale: Increasing awareness is a critical first step to appealing to the sizeable population of culturally-active people in the greater Wilmington region who do *not* currently attend AFDF institutions. Overall awareness of AFDF institutions is low – and awareness is a prerequisite to reaching the threshold of interest that leads to a motivation to attend. While there are certainly other barriers to attendance to address among those who *are* aware of the institutions (and deciding not to attend), the passive barrier of lack of awareness and familiarity is the more substantial obstacle that AFDF must first contend with.

- **Strategy #3: Develop distinct strategies for each of the geographic target regions**
 - Rationale: Targeted areas within Pennsylvania and downstate Delaware – in addition to Wilmington *and* greater New Castle County – contain great potential to strengthen AFDF audiences. However, the strategies and messages for each region must be distinct; a blanket approach to audience development will obscure important regional differences. In context of these differences, it will be important for the consortium to also consider its own priorities and goals with regards to reaching further within *and* beyond Delaware; for instance, what are the imperatives around prioritizing *all* of Delaware over out-of-state areas?

Recommended Strategies: There are four key strategies that will take the AFDF consortium towards its goals (cont.)

- **Strategy #4: Improve the Wilmington “brand” and perceptions of its cultural landscape**
 - Rationale: AFDF’s goal of audience development is not a challenge facing the consortium alone; the city’s civic and cultural life needs to demonstrate a much greater vitality and draw in order to attract more audiences. Even among some of Wilmington’s current arts patrons, the city’s offerings appear to be faltering. Enacting this strategy will require broadening the collaboration to include other state, city, and cultural entities.

Next Steps: The focus groups will yield greater depth and insights to contribute to these key strategies

- In order to build upon these strategies in the richest and most useful ways, we have identified the top options for segmenting and focusing the upcoming four focus groups

- **Option one:** Geographic focus
 - The main goal would be to understand what it will take to get new patrons to attend AFDF institutions, considering the region in which they live
 - Primary segmentation is regional:
 - Two groups of cultural consumers from Chester/Delaware Counties in Pennsylvania (one group of current AFDF patrons, one group of non-patrons)
 - One group of cultural consumers from New Castle County, including Wilmington (non-patrons only)
 - One group of cultural consumers from downstate Delaware (non-patrons only)
 - Within each group, we will include a mix of demographic factors (including age, income, presence of children at home, etc.)

- **Option two:** AFDF crossover focus
 - The main goal would be to understand how to increase patron crossover between AFDF institutions
 - Primary segmentation is based on AFDF attendance:
 - One group of multi-organization AFDF patrons
 - Two groups of single-organization AFDF patrons
 - One group of cultural consumers who do not attend AFDF organizations (“non-patrons”)
 - Within each group, we will aim to include a mix of geographic regions
 - As well as a mix of other demographic factors (including age, income, presence of children at home, etc.)

Appendix

Project Background

Detailed Methodology

Organization-Specific Data

Survey Instruments

Project Background: Several project objectives guide the design, implementation, and analysis of this research

- The over-arching goals of this research initiative are:
 1. To learn how Wilmington arts organizations can best attract new patrons and increase engagement among current patrons
 2. To understand the needs, values, and opportunities among Delaware’s arts audiences
 - Both those currently engaged in AFDF organizations and those with the potential to participate
 3. To uncover the current perceptions of the Wilmington arts “brand” and identify areas of opportunity for strengthening that brand
 4. To identify the geographic “catchment areas” in which the AFDF arts organizations should focus its acquisition efforts
- These goals apply to all three phases of the project (and all research steps within)
 - Each research phase also has its own, more focused, set of objectives and key research questions
 - The Phase 2 process and objectives are outlined on the following pages

Detailed Methodology: Community Survey

- We surveyed culturally active people via telephone survey
 - Individuals were initially selected using random digit dialing
 - Respondents were then screened on cultural attendance: respondents had to have attended at least 2 arts or cultural events in the past year
 - Because this group is culturally active, it naturally includes a number of respondents who have attended AFDF organizations
 - Approximately 40% of the general population in these areas fit this criteria
 - This provides us with a rough estimate of the size of the cultural consumer segment within the broader population
- Phone interviews were conducted within four geographic regions
 - These target regions were identified in the Phase 1 Situation Assessment and in consultation with AFDF stakeholders:
 - New Castle County, Delaware
 - Chester and Delaware Counties, Pennsylvania*
 - Sussex and Kent Counties, Delaware*
 - Selected ZIP Codes in Salem and Gloucester Counties, New Jersey*
 - Our goal was to obtain a sample that was distributed across these four regions in rough proportion to the full population of this area
 - As a result, we did not need to weight this data
- Phone interviews were conducted November 24 – December 12, 2008

Detailed Methodology: Current Audience

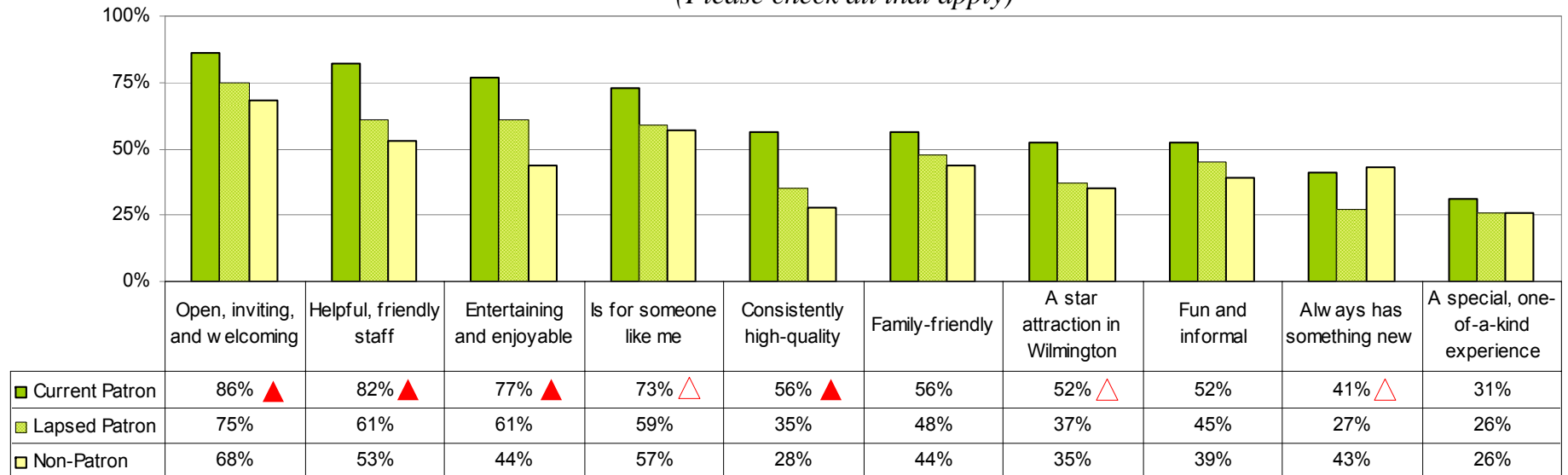
- We surveyed patrons from each of the five AFDF organizations using a combination of online, mail, and on-site surveys
 - We used the aggregated patron database assembled as part of the Phase 1 Situation Assessment to identify current patrons from The Grand, Delaware Symphony Orchestra, Delaware Theatre Company, OperaDelaware
 - Current patrons were defined as having subscribed or purchased single tickets within the last year
 - Online surveys were administered to patrons for whom we had valid email addresses
 - Mail surveys were administered only when we did not have a valid email address
 - Delaware Art Museum patrons received an on-site version of the survey
- All current patrons in the aggregated patron database received a survey, except for those who attended The Grand only
 - Patrons received a survey branded with the logo of the organization which they attended
 - In the case of cross-over attendance, patrons were randomly assigned to receive a survey branded with the logo of one of the organizations which they attended
 - Due to the large size of The Grand's patron list, we sent surveys to a random sample of roughly 28% of The Grand's patrons
 - Note that all patrons who attended The Grand and at least one other organization received a survey
- The online survey was in the field from December 2–28, 2008; the mail survey was in the field from mid-November to mid-December, 2008
 - The on-site survey at Delaware Art Museum was fielded November and December, 2008

Detailed Methodology: Current Audience (cont.)

- The overall response rate was 26% for online surveys and 17% for mail surveys
 - Response rates for each organization were as follows:
 - Delaware Theatre Company (24% response rate online, 18% mail)
 - The Grand (23% response rate online, 14% mail)
 - Delaware Symphony Orchestra (37% response rate online, 20% mail)
 - OperaDelaware (31% response rate online, 15% mail)
 - Response rates also varied by whether or not a patron attended multiple AFDF organizations
 - Patrons who attended multiple AFDF organizations within the last year were more likely to respond to the survey
- Weighting was used to make the data representative of the patron database where appropriate
 - Data was weighted according to:
 - The proportion of patrons attending each organization
 - The proportion of patrons receiving the mail versus the online survey
 - The proportion of multi-organization versus single-organization patrons
 - Unless otherwise noted, all reported Current Audience data has been weighted

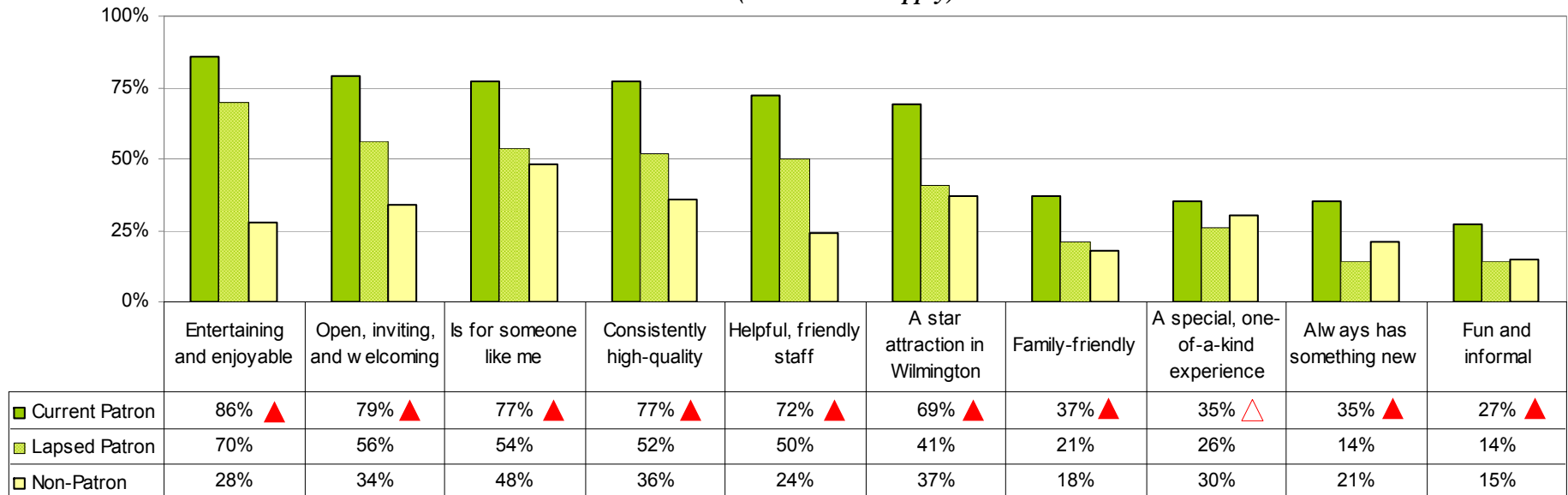
Organization-Specific Data: Delaware Art Museum Brand Attributes

“How would you describe Delaware Art Museum?”
(Please check all that apply)



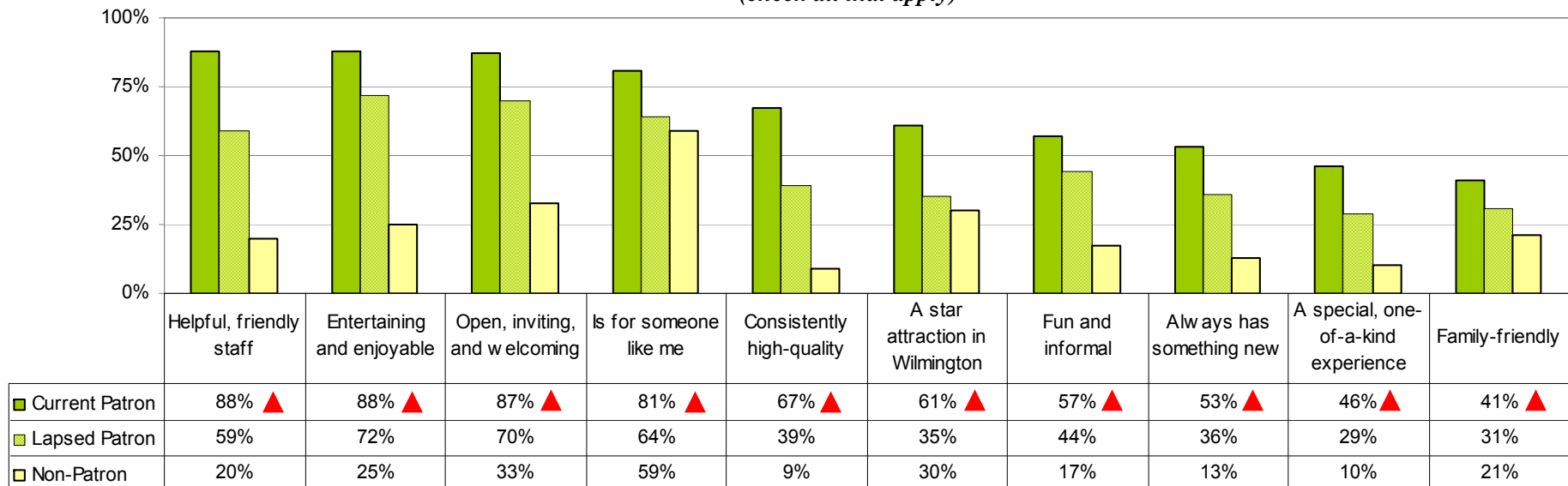
Organization-Specific Data: Delaware Symphony Orchestra Brand Attributes

*“How would you describe Delaware Symphony Orchestra?”
(check all that apply)*



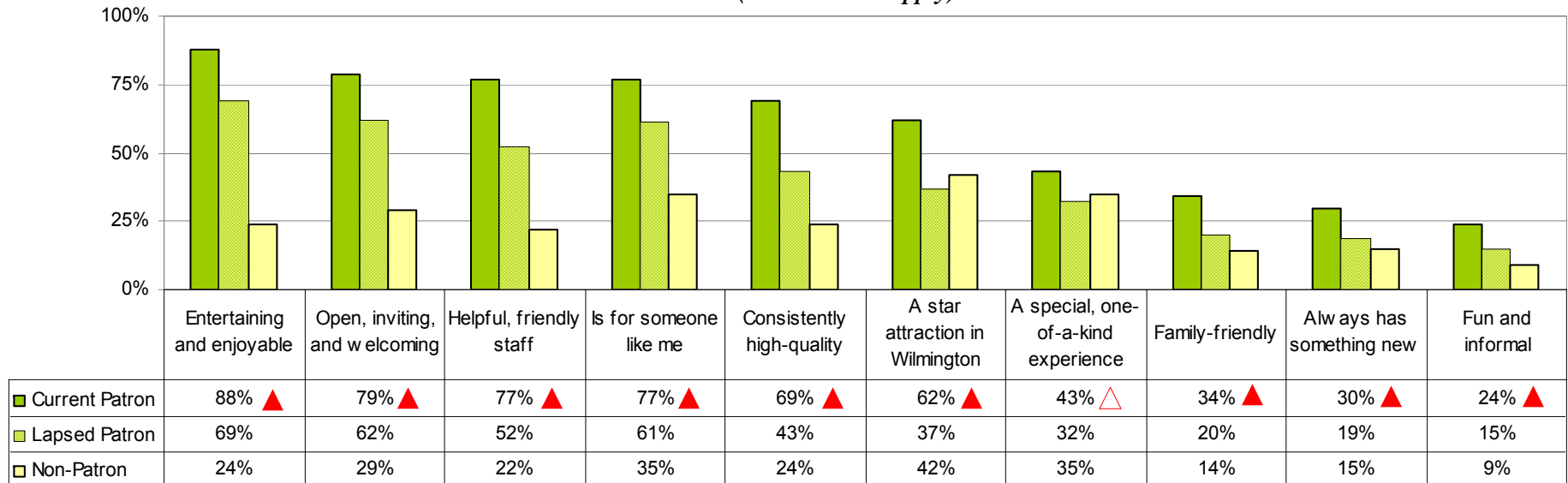
Organization-Specific Data: Delaware Theatre Company Brand Attributes

*“How would you describe Delaware Theatre Company?”
(check all that apply)*



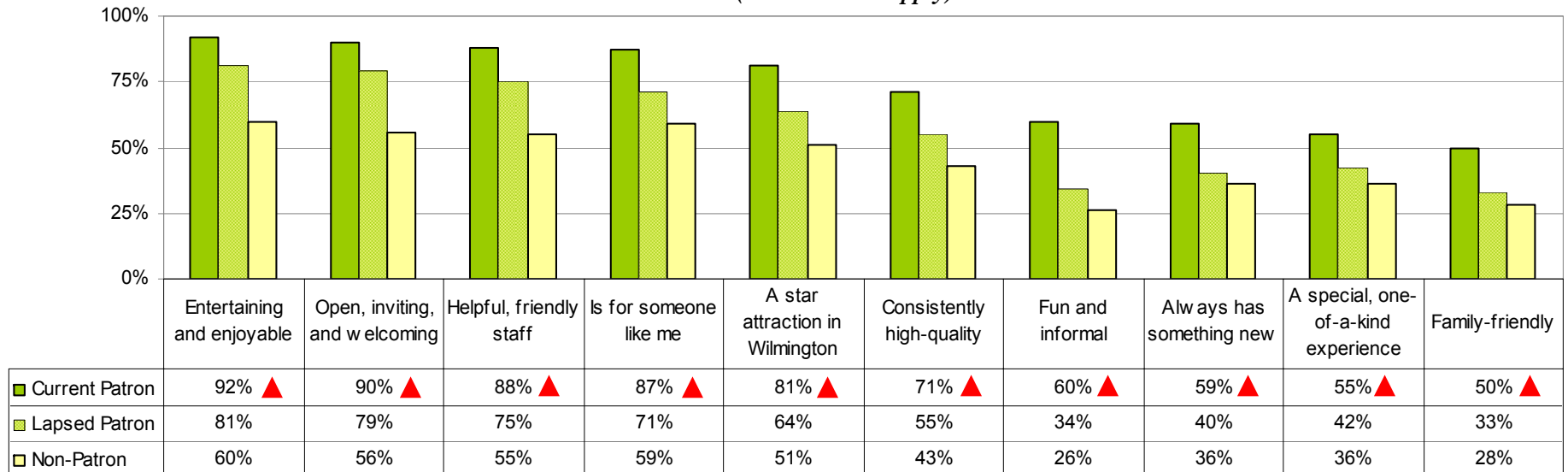
Organization-Specific Data: OperaDelaware Brand Attributes

*“How would you describe OperaDelaware?”
(check all that apply)*



Organization-Specific Data: The Grand Brand Attributes

“How would you describe The Grand?”
(check all that apply)



WILMINGTON ARTS SURVEY

Thank you for participating in this important research study. Your participation will help us to serve our audiences better. Please answer all of the questions, and we thank you very much in advance!

1. In the past SIX months, how many arts or cultural activities or events have you attended or participated in? (This could include visiting a museum, zoo, or aquarium, attending a live arts performance, visiting a gallery, and so on).

- None
- 1-3 events or activities
- 4-7 events or activities
- 8 or more events or activities

2. Which of the following entertainment or leisure-time activities do you participate in often? (Check ALL that apply)

- | | |
|---|--|
| <input type="checkbox"/> Going to the movies | <input type="checkbox"/> Attending classical music or opera |
| <input type="checkbox"/> Going to parks for recreation | <input type="checkbox"/> Reading for pleasure |
| <input type="checkbox"/> Visiting museums | <input type="checkbox"/> Attending talks, lectures, or presentations (other than for school or work) |
| <input type="checkbox"/> Visiting gardens (such as botanic or public gardens) | <input type="checkbox"/> Attending professional or school sporting events |
| <input type="checkbox"/> Visiting zoos or aquariums | <input type="checkbox"/> Other (please specify: _____) |
| <input type="checkbox"/> Attending live theater or musicals | <input type="checkbox"/> NONE of these |
| <input type="checkbox"/> Attending dance performances | |

3. How much do you agree or disagree with the following statements about the Wilmington area?

	Disagree Strongly	Disagree	Disagree Somewhat	Neither Agree nor Disagree	Disagree Somewhat	Agree	Agree Strongly
The Wilmington arts and cultural scene is exciting and diverse							
I am pleased with the downtown revitalization efforts in Wilmington							
I feel a strong sense of loyalty and civic pride for Wilmington							
I feel like downtown Wilmington is unsafe							
Wilmington arts organizations depend a lot on financial support from individual patrons							
The economic downturn has affected my participation in arts and culture							
The Wilmington arts scene has changed a great deal in recent years – for the better							
I prefer to stay in Wilmington for arts and cultural events rather than go to Philadelphia or elsewhere							

4. How familiar would you consider yourself to be with each of the following arts organizations in the Wilmington area? (Please select one option for each organization by putting a check mark in the appropriate box below.)

	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
Delaware Art Museum				
Delaware Symphony Orchestra				
Delaware Theatre Company				
The Grand Opera House				
OperaDelaware				

5. How frequently do you attend each of the following organizations? (Please select one option for each organization by putting a check mark in the appropriate boxes below.)

	I have <u>never</u> attended	I attended <u>more than five years ago</u>	I attended <u>1-5 years ago</u>	I have attended <u>in the past year</u>
Christina Cultural Arts Center				
Delaware Art Museum				
Delaware Center for the Contemporary Arts				
Delaware Museum of Natural History				
Delaware Symphony Orchestra				
Delaware Theatre Company				
DuPont Theatre				
First State Ballet Theatre				
The Grand Opera House (<i>other than for the Delaware Symphony or OperaDelaware</i>)				
Hagley Museum				
Longwood Gardens				
OperaDelaware				
Winterthur Museum & Country Estate				

6. How would you rate your overall satisfaction with these five organizations? (Please circle one number on the 5-point scale for each organization. If you are not familiar with the organization, please circle "N/A").

	Poor				Excellent	
Delaware Art Museum	1	2	3	4	5	N/A
Delaware Symphony Orchestra	1	2	3	4	5	N/A
Delaware Theatre Company	1	2	3	4	5	N/A
The Grand Opera House	1	2	3	4	5	N/A
OperaDelaware	1	2	3	4	5	N/A

7. How likely are you to attend each organization in the next 6 months? (Please circle one number on the 5-point scale for each organization.)

	Not at all likely				Very Likely
Delaware Art Museum	1	2	3	4	5
Delaware Symphony Orchestra	1	2	3	4	5
Delaware Theatre Company	1	2	3	4	5
The Grand Opera House	1	2	3	4	5
OperaDelaware	1	2	3	4	5

8. Out of the options listed below, which TWO are the most important to your decision to attend an arts or cultural activity or event? (Please check two of the six items below).

- | | |
|--|--|
| <input type="checkbox"/> The date of the event | <input type="checkbox"/> Parking at the venue |
| <input type="checkbox"/> The time | <input type="checkbox"/> Perceptions of safety at the venue |
| <input type="checkbox"/> The price | <input type="checkbox"/> Other plans or activities around the event (such as dining, etc.) |

9. How do you typically hear about arts and cultural events? (Please select all that apply).

- | | |
|---|--|
| <input type="checkbox"/> I receive mailings about them | <input type="checkbox"/> I read about them in newspaper or magazine articles |
| <input type="checkbox"/> I receive emails about them | <input type="checkbox"/> I see print advertisements for them |
| <input type="checkbox"/> I look at particular organizations' websites | <input type="checkbox"/> I see or hear about them on radio or television |
| <input type="checkbox"/> Friends or family recommend them to me | <input type="checkbox"/> Other (please specify: _____) |

10. To what degree would each of the following make it more likely for you to attend each of the following organizations in the future, regardless of your past history of attending?

Please check one option in each row for each organization that best describes your likely attendance if the following changes were made:

	I would attend <u>as often</u> as I do now	I <u>might</u> attend more often	I <u>definitely</u> would attend more often
Delaware Art Museum			
Greater variety of performances or exhibits			
Higher quality of performances or exhibits			
Better facilities (<i>building, seating, etc.</i>)			
If I received more information about what was going on			
More family-friendly experiences			
Closer/more convenient to me			
Knowing that the organization really needs my support			
Better reviews/reputation			
More affordable price			
More friends or family members who want to attend with me			
More new or contemporary programming			

	I would attend <u>as often</u> as I do now	I <u>might</u> attend more often	I <u>definitely</u> would attend more often
Delaware Symphony Orchestra			
Greater variety of performances or exhibits			
Higher quality of performances or exhibits			
Better facilities (<i>building, seating, etc.</i>)			
If I received more information about what was going on			
More family-friendly experiences			
Closer/more convenient to me			
Knowing that the organization really needs my support			
Better reviews/reputation			
More affordable price			
More friends or family members who want to attend with me			
More new or contemporary programming			

	I would attend <u>as often</u> as I do now	I <u>might</u> attend more often	I <u>definitely</u> would attend more often
The Grand Opera House			
Greater variety of performances or exhibits			
Higher quality of performances or exhibits			
Better facilities (<i>building, seating, etc.</i>)			
If I received more information about what was going on			
More family-friendly experiences			
Closer/more convenient to me			
Knowing that the organization really needs my support			
Better reviews/reputation			
More affordable price			
More friends or family members who want to attend with me			
More new or contemporary programming			

	I would attend <u>as often</u> as I do now	I <u>might</u> attend more often	I <u>definitely</u> would attend more often
OperaDelaware			
Greater variety of performances or exhibits			
Higher quality of performances or exhibits			
Better facilities (<i>building, seating, etc.</i>)			
If I received more information about what was going on			
More family-friendly experiences			
Closer/more convenient to me			
Knowing that the organization really needs my support			
Better reviews/reputation			
More affordable price			
More friends or family members who want to attend with me			
More new or contemporary programming			

(Continued)

(10., cont.) Please check one option in each row that best describes your likely attendance if...

The Delaware Theatre Company	I would attend <u>as often</u> as I do now	I <u>might</u> attend more often	I <u>definitely</u> would attend more often
Greater variety of performances or exhibits			
Higher quality of performances or exhibits			
Better facilities (<i>building, seating, etc.</i>)			
If I received more information about what was going on			
More family-friendly experiences			
Closer/more convenient to me			
Knowing that the organization really needs my support			
Better reviews/reputation			
More affordable price			
More friends or family members who want to attend with me			
More new or contemporary programming			

11. For each description below, please check as many organizations as you feel the phrase applies to, if any.

	Delaware Art Museum	Delaware Symphony Orchestra	The Grand Opera House	OperaDelaware	Delaware Theatre Company
Open, inviting, and welcoming					
Helpful, friendly staff					
Entertaining and enjoyable					
Is for someone like me					
A special, one-of-a-kind experience					
Always has something new to see or do					
A star attraction in Wilmington					
Consistently high-quality					
Family-friendly					
Fun and informal					

12. Is there anything else you would like to tell us about arts and culture in the Wilmington area?

The following information will be strictly confidential and will be used for statistical purposes only.

13. Are you:

- Male Female

14. To which age group do you belong?

- Under 25 55-64
 25-34 65-74
 35-44 75 or over
 45-54

15. Please check the highest level of education that you have completed.

- High school/GED or less
 Some college
 College degree
 Some graduate work
 Graduate/Post-graduate degree

16. Do you have children under the age of 18 living in your house?

- Yes No

17. Into which of the following categories does your annual household income fall?

- Under \$25,000
 \$25,000 - \$49,999
 \$50,000 - \$74,999
 \$75,000 - \$99,999
 \$100,000 - \$149,999
 \$150,000 - \$199,999
 \$200,000 or more

18. What do you consider to be your ethnic origin?

(Please check all that apply.)

- African-American/Black
 Asian/Pacific Islander
 Caucasian/White
 Latino/Hispanic
 Native American
 Other (please specify: _____)

Thank you for your time. We look forward to seeing you in the future!

Hello, my name is [FIRST NAME], and I'm a public opinion researcher working on an important nonprofit research study. We're talking to selected people to get their opinions about some important issues in the region — we're not selling anything or asking for a donation. Our conversation will take less than 15 minutes and I hope we can count on your participation. For participating in the study, you will be eligible for a drawing for a \$200 Visa card.

[IF RESPONDENT RESISTS:] Your household has been carefully selected for this study, so we really need you to participate. Without your responses, the results won't be as valuable.

[IF RESPONDENT IS TOO BUSY:] Let's set up an appointment, then. What would be a convenient time for me or one of my colleagues to phone you back?

[IF RESPONDENT ASKS, SUPPLY NAME OF RESEARCH FIRM/CENTER. DO NOT REVEAL SPONSOR OR THE DIRECT TOPIC OF THE RESEARCH, AND IF NECESSARY EXPLAIN THAT THIS MIGHT INFLUENCE RESPONSES. "I CAN TELL YOU AT THE END OF THE SURVEY."]

[IF RESPONDENT AGREES TO PARTICIPATE, THANK AND CONTINUE:]

1. In the first few questions, we'd like to ask you about how you spend your free time, and about the Wilmington area in general. In the past TWELVE months, how many arts or cultural activities or events have you attended or participated in? This could include visiting a museum, or aquarium, attending a concert or play, visiting a gallery, and so on. In the past twelve months, how many times have you participated in those types of events or activities?

[OPEN-END]. ____ events or activities

[TERMINATE IF "0" or "1". WE MAY TERMINATE IF "2" AS WELL, DEPENDING ON INCIDENCE. PLEASE PROVIDE SLOVER LINETT WITH INCIDENCE AFTER FIRST NIGHT OF FIELDING]

2. **When you think about specific arts or cultural organizations in the Wilmington area, which come to mind?** [List as many as possible, up to 10. PROMPT: "Anything else?" until respondent cannot name others. Make sure they are entered in the order in which respondent provides them.]

3. **Which of the following entertainment or leisure-time activities do you participate in often?**

[RANDOMIZE. READ LIST AND ENTER RESPONSE AFTER EACH. IF RESPONDENT ASKS WHAT "OFTEN" MEANS, PLEASE KEEP GENERAL [i.e., "Whatever 'often' means to you."]

Going to the movies

Going to parks for recreation

Visiting museums

Visiting gardens, such as botanic or public gardens

Visiting zoos or aquariums

Attending live theater or musicals

Attending dance performances

Attending classical music or opera

Reading for pleasure

Attending talks, lectures, or presentations (other than for school or work)

Attending professional or school sporting events

- 1 Yes
- 0 No
- 99 Refused [DO NOT READ]

4. Please tell me to what extent you Agree or Disagree with each of the following statements about the Wilmington area, where 1 is "Strongly Disagree", 4 is "Neither Agree nor disagree", and 7 is "Agree Strongly". [REPEAT SCALE IF NEEDED.]

[RANDOMIZE STEMS]

- The Wilmington arts and cultural scene is exciting and diverse
- I am pleased with the downtown revitalization efforts in Wilmington
- I feel a strong sense of loyalty and civic pride for Wilmington
- I feel like downtown Wilmington is unsafe
- Wilmington arts organizations depend a lot on financial support from individual patrons
- The economic downturn has affected my participation in arts and culture
- The Wilmington arts scene has changed a great deal in recent years – for the better
- I'd prefer to go to Wilmington for arts and cultural events, rather than go to Philadelphia or elsewhere

[SCALE:]

- 1 Strongly disagree
- 2 Disagree
- 3 Somewhat disagree
- 4 Neither agree nor disagree
- 5 Somewhat agree
- 6 Agree
- 7 Strongly agree
- 99 Refused [DO NOT READ]

5. How familiar would you consider yourself to be with the following arts organizations in the Wilmington area? [RANDOMIZE. READ LIST. READ SCALE AND REPEAT AS NEEDED.]

- Delaware Art Museum
- Delaware Symphony Orchestra
- Delaware Theatre Company
- The Grand Opera House
- OperaDelaware

[SCALE:]

- 1 Not at all familiar
- 2 Not very familiar
- 3 Somewhat familiar
- 4 Very familiar

6. We will now name several organizations. How recently have you attended each of the following organizations? [Randomize]

- Christina Cultural Arts Center
- Delaware Art Museum
- Delaware Center for the Contemporary Arts
- Delaware Museum of Natural History
- Delaware Symphony Orchestra
- Delaware Theatre Company
- DuPont Theatre
- First State Ballet Theatre
- The Grand Opera House, other than for the Delaware Symphony or OperaDelaware

Hagley Museum
 Longwood Gardens
 OperaDelaware
 Philadelphia Museum of Art
 The Philadelphia Orchestra
 Winterthur Museum & Country Estate

[SCALE:]

- 1 I have never attended
- 2 I have attended more than 5 years ago
- 3 I attended 1-5 years ago
- 4 I have attended in the past year

7. [Only ask organizations if respondent is "Somewhat familiar" or "Very familiar" for each in Q5] **When thinking about [INSERT ORGANIZATION NAME], please tell me whether the following phrases describes that organization. If you are not sure, or have not visited recently, just give me your perceptions of [INSERT ORGANIZATION NAME]. Please answer "yes" or "no" for each.** [Randomize columns and stems]

	Delaware Art Museum	Delaware Symphony Orchestra	The Grand Opera House	Opera Delaware	Delaware Theatre Company
Open, inviting, and welcoming					
Entertaining and enjoyable					
Is for someone like you					
A special, one-of-a-kind experience					
Always has something new to see or do					
A star attraction in Wilmington					
Consistently high-quality					
Family-friendly					
Fun and informal					

8. [Only show organizations if respondent has ever attended [Q6]] **How satisfied are you with your experience with each of the following organizations? Please rate it on a 5-point scale, where "1" is "Poor" and "5" is "Excellent.** [Randomize]

Delaware Art Museum
 Delaware Symphony Orchestra
 Delaware Theatre Company
 The Grand Opera House
 OperaDelaware

[SCALE:]

- 1 Poor
- 2
- 3
- 4
- 5 Excellent
- 99 Refused [DO NOT READ]

9. How important to you are each of the following when deciding whether to attend an arts or cultural activity or event? Please use a scale where 1 is "Not important at all" and 5 is "Very important".

- The variety of performances or exhibits offered
- The quality of the performance or exhibit
- The facilities (*such as the building, seating, etc.*)
- The amount of information I receive about the event or organization
- An experience that is "family-friendly"
- The location or convenience of the event
- Knowing whether the organization needs my support or not
- Reviews or reputation of the event or organization
- Affordable prices
- Friends or family members who want to attend with me
- New or contemporary programming

10. Please think about what has prevented you, personally, from attending cultural events/activities in the past 12 months – or prevented you from attending more than you did. Which of the following issues were a factor in that decision?

- I did not see any programming or events that appealed to me
- I haven't heard about any "can't miss" cultural events from my friends or family
- I don't feel comfortable in cultural institutions
- It's too much hassle for me to get to and from the events or venues
- I do not receive enough information about cultural activities or organizations to know what I'd like
- Tickets are too expensive
- Events are not "family-friendly" enough
- I am too busy to attend cultural events
- I don't usually enjoy cultural events and activities
- My health prevents me from attending cultural events or activities
- My personal finances prevent me from attending cultural events or activities
- I don't know my own schedule far enough in advance to plan a visit
- I don't know people who'd want to go with me

Q10a. Are there other issues that prevented you from attending, or attending more than you did? [Open-end]

Q11. Suppose a friend whose opinion you trust recommended a _____ How far would you be willing to travel to see it? [Randomize stems]

- Stems: classical music concert
pop or popular music concert
art exhibit at an art museum
play (at a theatre)

[Only read if prompt needed]:

- 1 0-15 minutes
- 2 16-30 minutes
- 3 31 minutes to 45 minutes
- 4 46 minutes to 1 hour
- 5 An hour to 1 and a half hours
- 6 1 and a half to 2 hours
- 7 More than 2 hours

12. When it comes to attending cultural events or activities, how well do the following statements describe you personally? Please use a scale where 1 is "Does not describe me at all" and 5 is "Describes me very well". [READ SCALE. RANDOMIZE]

- I often get an "emotional high" from attending the arts
- I wish there were more interactive experiences at museums and performances
- I love to learn about the artists and their work
- The arts are an escape from my everyday world
- I would love to attend a social event at an art museum, theatre or other performing arts
- I attend museums and performances to see or hear something new
- I enjoy being challenged by arts experiences
- "Behind the scenes" or special access to exhibits and performances is very appealing to me

[SCALE:]

- 1 Does not describe me at all
- 2 2
- 3 3
- 4 4
- 5 Describes me very well
- 99 Refused [DO NOT READ]

Q13 [GENDER. INTERVIEWER SELECT WITHOUT ASKING]

- Male respondent
- Female Respondent

Just a few more questions about yourself, for statistical purposes – and this information will be anonymous. What is your age? [Read if needed: The following information will be strictly confidential.]

Q14. What is your age? _____

- 1 Record Age
- 99 Refused

[IF REFUSED] We understand you may not want to give your exact age. Which of the following categories does your age fall into?

- 1 Under 25
- 2 25 to 34
- 3 35 to 44
- 4 45-54
- 5 55-64
- 6 65-74

- 7 75 or over
- 99 Refused [DO NOT READ]

Q15. What is the highest level of education that you've completed? Is it...

- 1 High school/GED or less
- 2 Some college
- 3 College degree
- 4 Some graduate work
- 5 Graduate or post-graduate degree
- 99 Refused [DO NOT READ]

Q16. Do you have any children under the age of 18 living in your house?

- 1 Yes
- 0 No
- 99 Refused [DO NOT READ]

Q17. Please stop me when I come to the category that represents your household income.

[READ]

- 1 Under \$25,000
- 2 \$25,000–49,999
- 3 \$50,000–74,999
- 4 \$75,000–99,999
- 5 \$100,000–149,999
- 6 \$150,000–199,999
- 7 \$200,000 or more
- 99 Refused [DO NOT READ]

Q18. What do you consider to be your ethnic origin? [READ LIST (EXCEPT FOR 99). ACCEPT MULTIPLE RESPONSES]

- 1 African American or Black
- 2 Asian or Pacific Islander
- 3 Caucasian or White
- 4 Latino or Hispanic
- 5 Native American
- 6 Other
- 99 Refused [DO NOT READ]

Q19. What is your ZIP code? _____ *(Mike to confirm with provider whether is is required)*

[ENTER RESPONSE, THEN REPEAT TO CONFIRM]

Q20. Is there anything else you would like to tell us about arts and culture in the Wilmington area?

Those are all the questions we have for you. Thank you very much for your time today. [END.]