

ANNOUNCING

COMING BACK

STRONGER

*Using the Shutdown to Rebuild Audience Loyalty*

**MEMBERS-ONLY VIRTUAL SUMMIT**



*Transforming Arts Organizations Worldwide*

Welcome to the Summit  
January 2021

# Agenda for our Time Today

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01

THE  
CHALLENGE  
Why we are talking  
about audience  
loyalty now

02

ENGAGING  
AUDIENCES  
What drives  
loyalty

03

FROM  
CONCEPT TO  
REALITY  
What it takes to  
build emotional  
engagement

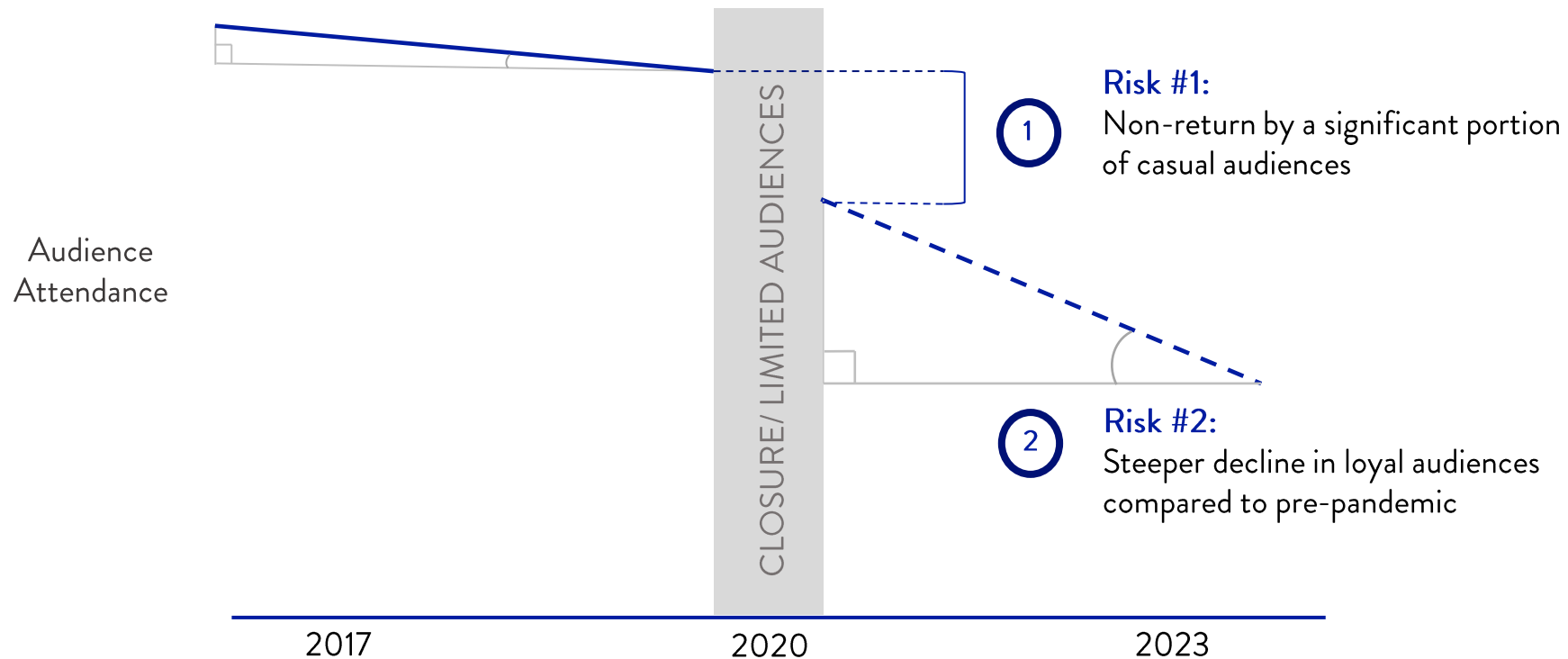
# Introductions

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Please introduce yourself in the chat and tells us one thing you've done during the shutdown to encourage audience return

# The Risks to Audience Return Post-Pandemic Are Real

## Post-Pandemic Risks to Audience Loyalty at Arts and Culture Organizations



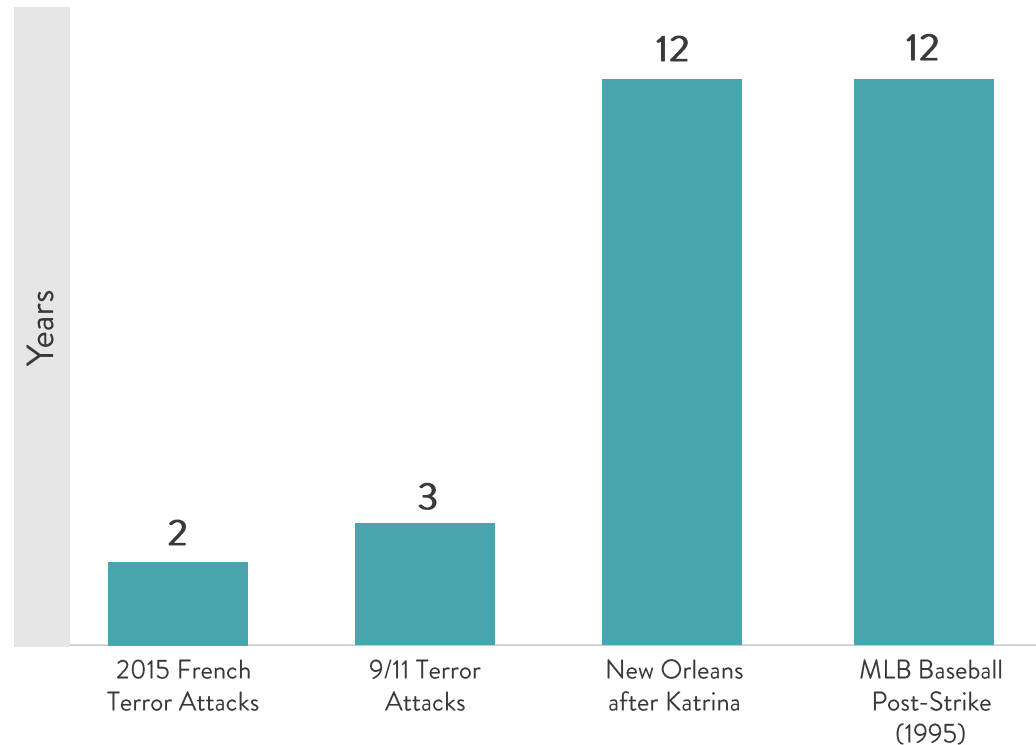
Source: ABA research.

# Polling Results

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# Disruptions Have a History of Changing Behaviors

## Time To Visitor Recovery Post Incident



## What Determines Likelihood of Returning to Old Habits After Disruption?

- How frequent and rigid is the new behavior compared to the old behavior?
- How strong and disciplined was the original habit?
- How much does the habit depend on context? (social context, technology changes)

**For most, arts consumption habits were not strong pre-pandemic and there are now many culture and entertainment replacements**

Sources: [EDN Hub](#), [US Dept of Transportation](#), [Baseball Reference](#), [New Orleans CVB](#)

Sources: <https://lrwonline.com/perspective/consumer-psychology-and-coronavirus-turning-new-habits-into-opportunities/>  
<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7269931/>

# We Can't Count on Audiences To Predict Their Own Behavior

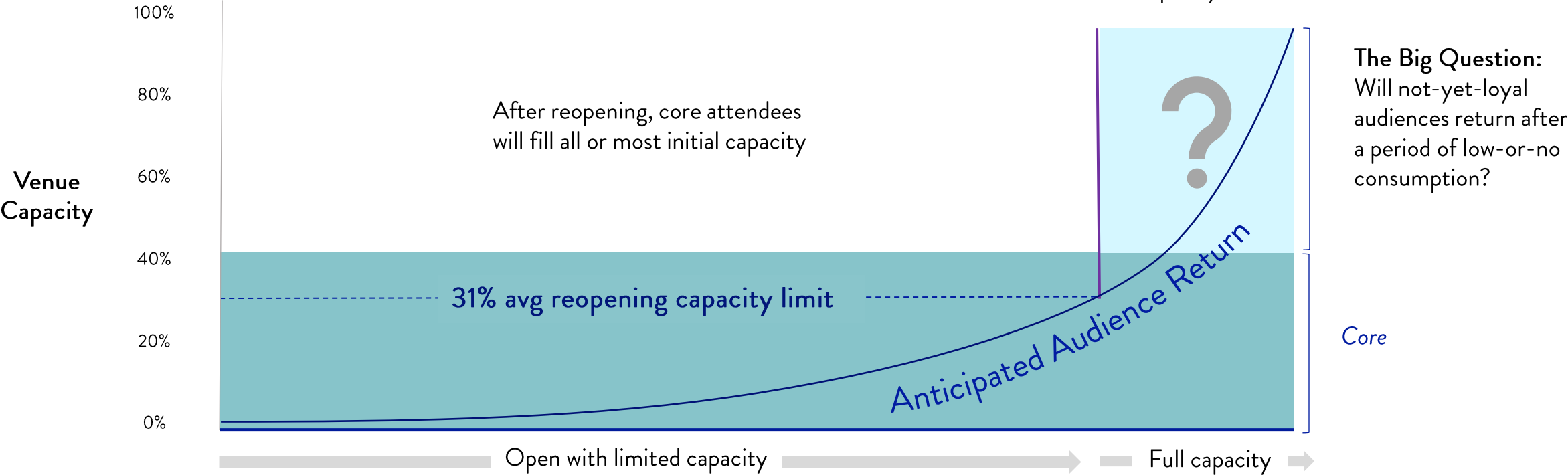
When performing and visual arts audiences were asked in 2009 about the likelihood of the economy affecting their ability to return after the financial crisis, their expectations were far more optimistic than the reality two years later.



Source: [Culture Track 2011](#)

# We Particularly Need to Secure Casual Audiences

## Venue Capacity Post-Reopening



Source: ABA research; segment analytics of ABA's arts motivation survey.



# The Risk Is Not the Same for All Audiences



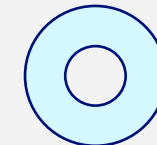
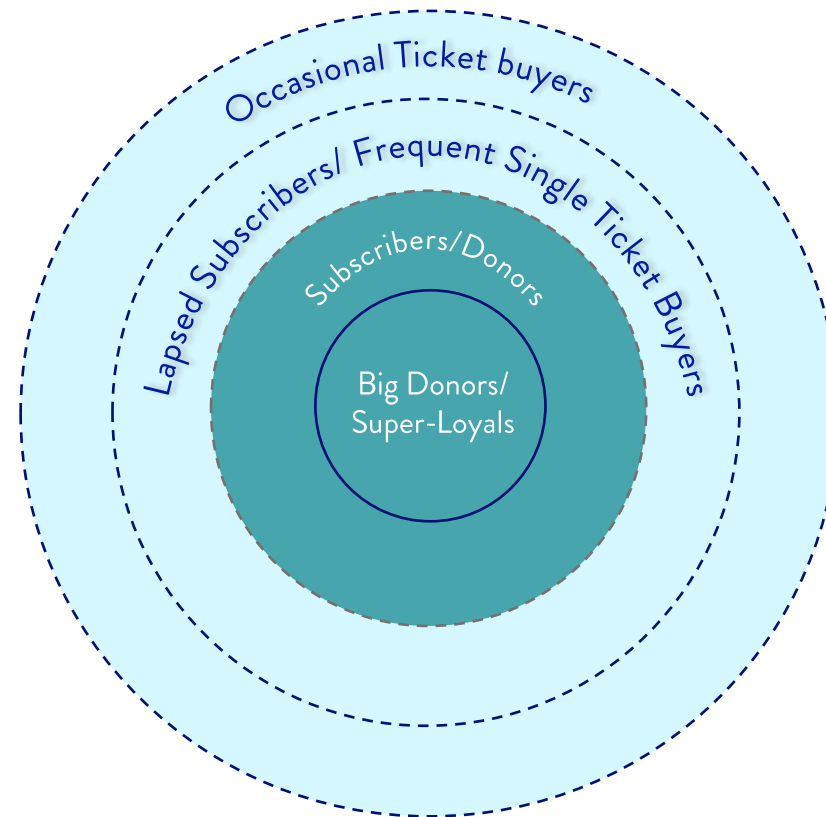
## Loyals

### More Likely to Consume Our Current Offer

Digital content frequently repackages the in-person experience in a home-friendly way, which is exactly what “Loyals” want.

### More Likely To Return on Their Own

For a large minority of your audience, your artform or cultural genre is intrinsically valuable. They would likely return no matter what you do during closure.



## Not-Yet-Loyals

### Less Likely to Consume Our Current Digital Offer

Most arts and culture organizations (79%) tell ABA that their digital efforts are directed at all existing audiences, but not-yet-loyals are significantly less likely to consume.

### More Likely To Be Diverted from the Arts

Because they’re less attached to the arts, single ticket buyers are more susceptible to distraction and change during closure.

# Key Question of Our Research

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“How should I engage with audiences right now to shorten recovery time post-reopening?”

# Dove Real Beauty Sketches



What is Dove trying to achieve with this video?  
Who are they trying to reach?

# You Might Be Wondering...

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Why are we talking about brands starting movements?

# We Have Plenty of Data to Talk About During Our Sessions

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## *The New Loyals Data Collection*

“Jobs to be done” interviews, market research and in-depth survey with 5,000 responses from broad range of arts attendees.

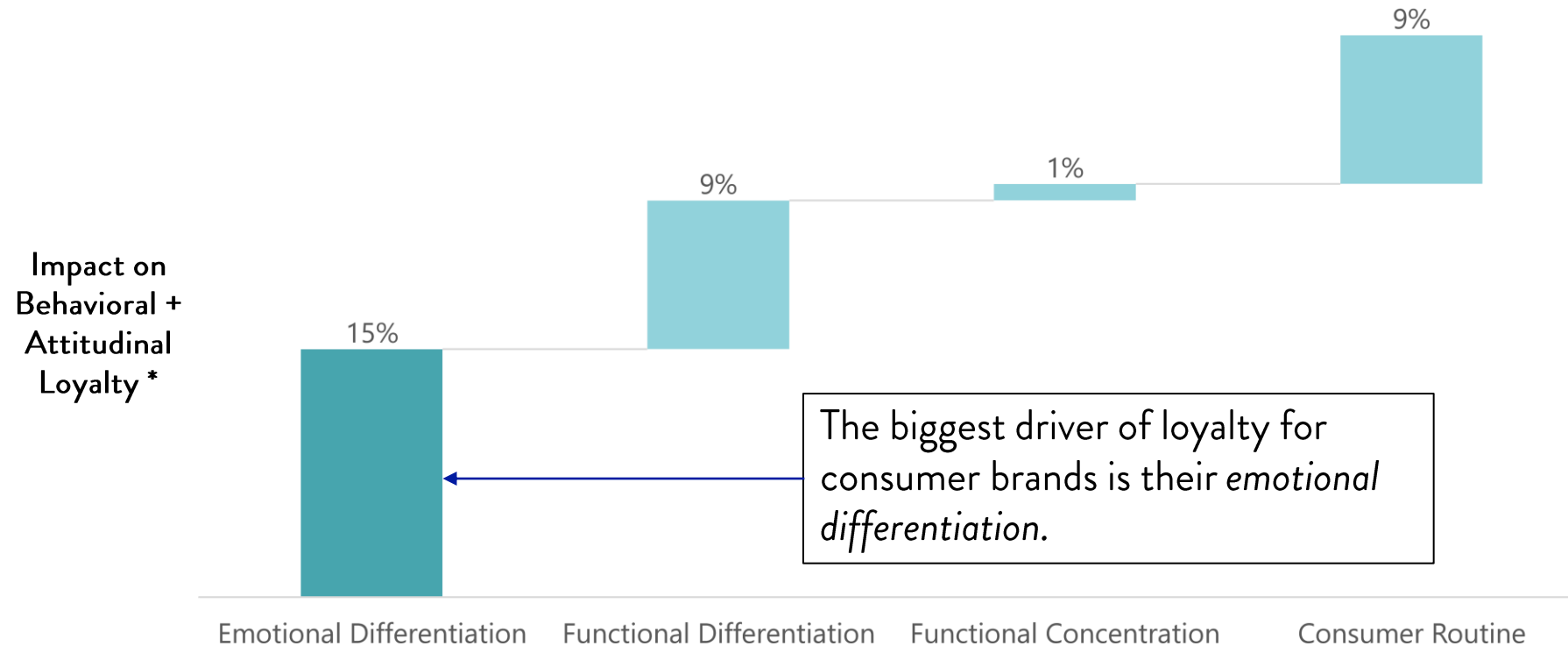


## *Brand Loyalty Analysis*

125 interviews with 23 consumer brands, survey of 10,000 consumers from 16 categories and 73 brands in the US and UK.

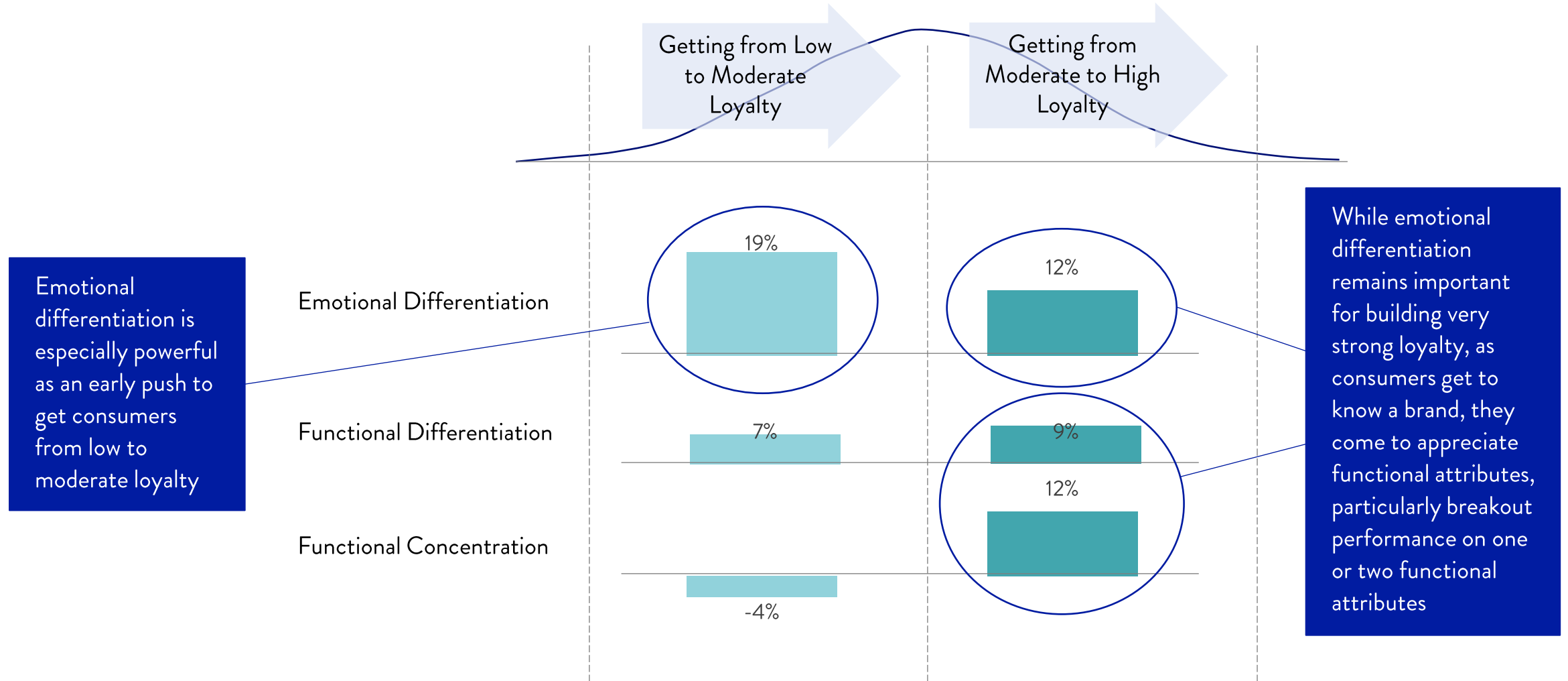
# The Key to Boosting Brand Loyalty is 'Emotional Connection'

Relative Impact on Loyalty of Brand Attributes



\* Measured as Impact of Moving from 25<sup>th</sup> to 75<sup>th</sup> Percentile Performance on Each Driver. N = ~10,000 consumers. Loyalty defined by behavioral measures (share of requirements, price premium, intent to repurchase) and attitudinal measures (willingness to recommend, word-of-mouth quality, satisfaction and self-identified loyalty). Source: CEB

# Emotional Connection Matters as a Way To Build Initial Loyalty



# Shared Values Achieve a More-Intense Bond in Brands

Higher Order



Level of Emotional Connection



Lower Order



## Functional Benefit

Generating excitement around specific functional aspects of the product/service

Examples:

- Famous spokesperson
- Well reviewed
- New features



## Emotional Benefit

Drawing attention to emotional aspects of the value proposition

Examples:

- Have more confidence
- Experience range of emotions
- Spend time on self care



## Shared Value

Connecting your purpose to beliefs that your target customer holds dear

Examples:

- A life spent outdoors is a life well spent
- If you have a body, you are an athlete
- Every dog deserves love

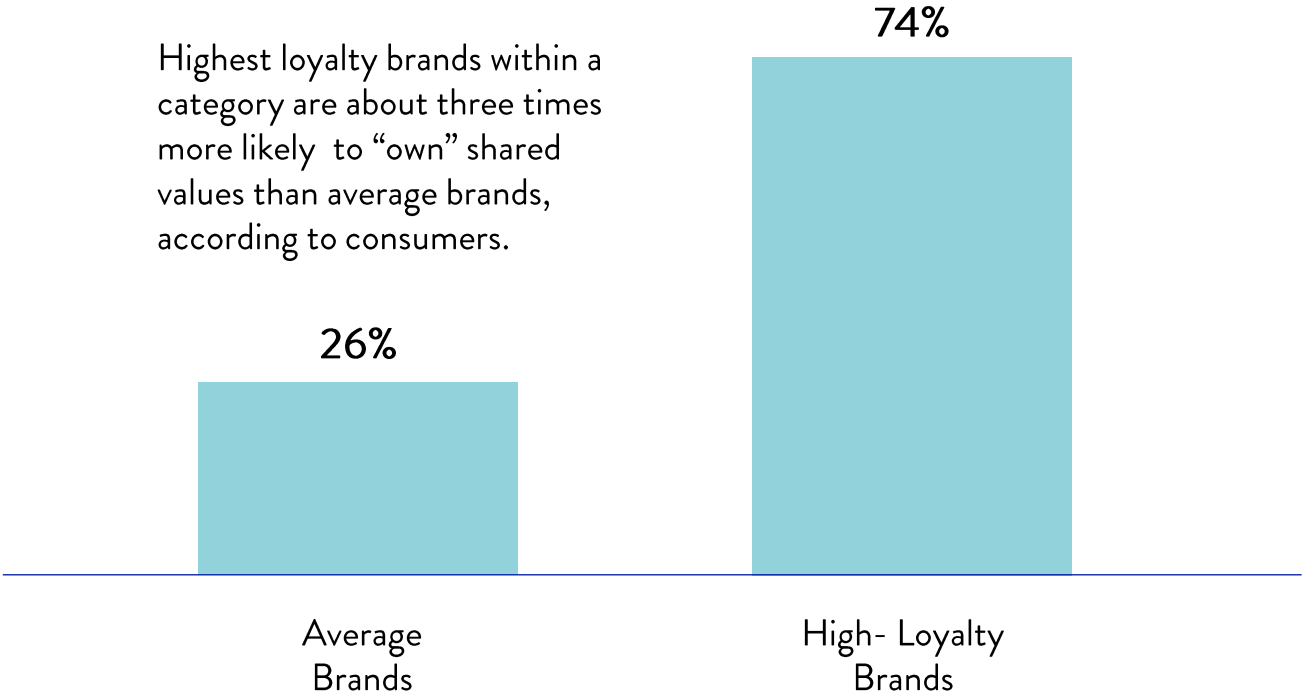




# Emotional Connection Power Grows with Higher Order Attributes

## Perceived “Ownership” of Shared Values

*Category Leadership on Higher-Order Emotional Attributes*



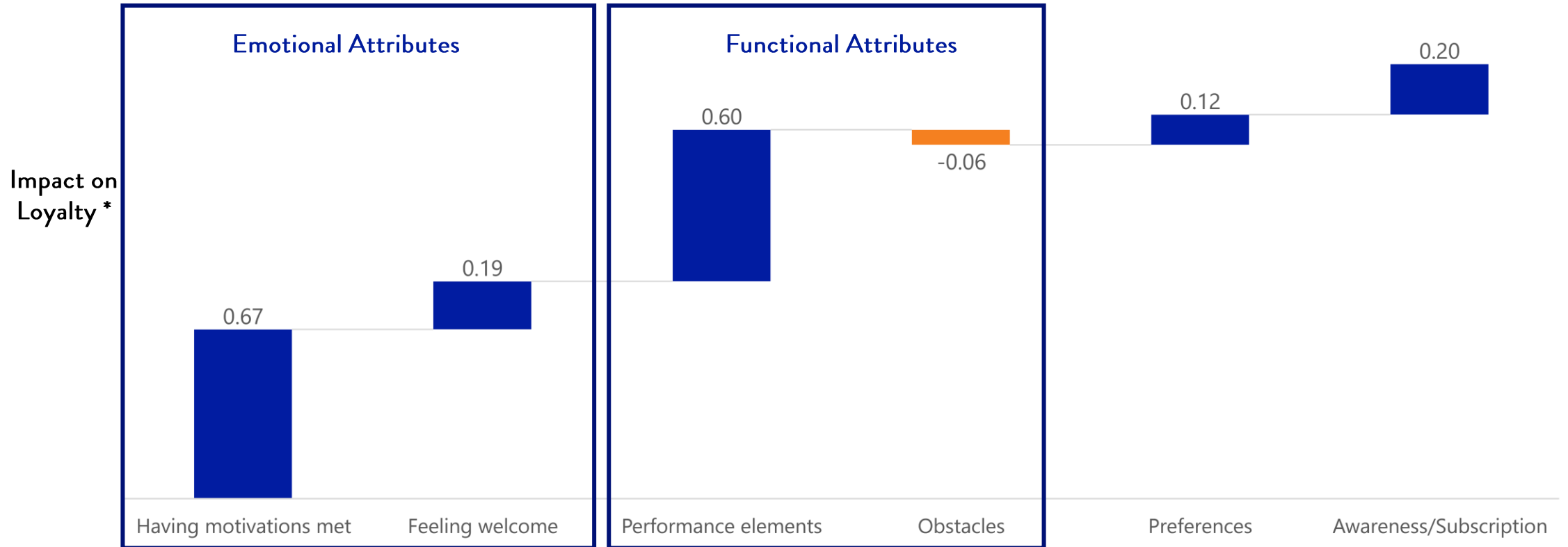
# Chat question

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What's an example of a brand with a shared value?

# Arts Audiences Reward Emotional Connection with Loyalty

Relative Impact on Recommendation\*\*



\* Measured as impact of moving from 25<sup>th</sup> to 75<sup>th</sup> percentile performance on each driver. N = ~5,000

\*\*Performance elements = rating of things like performers, composition, staging, seats, staff service, value for money. Preferences refers to interest in challenging or familiar art, or desire to know behind-the-scenes details. Genre was also relevant to recommendation but similarly high for all and uncontrollable, so we did not include it above.

# For 33% Of Audiences, Functional = Emotional

*Motivational Segments from ABA Audience Research*

For 1/3 of your audiences, the functional attributes of the performance are easily translated into what they value because what they care most about is what's on stage. The art form is part of their identity.

33%: Arts Lovers

14%: Arts Passionates

19%: Quality Seekers

Further from the Stage

Closer to the Stage

# For the Remaining 66%, Values Further From the Stage

## 66%: Looking for Something Else

12% Social Samplers  
*Try something new*

9% Culture Surfers  
*See popular/famous works*

14% Conversational Challengers  
*Converse, challenge preconceptions*

9% Willing Companions  
*Support friends/family*

11% Civic Stewards  
*Fulfill duty to the arts,  
create community*

13% Mastery Builders  
*Gain expertise*

For 2/3 of your audiences, the art form requires translation to what they value most.

Further from the Stage

Closer to the Stage

# Shared Values Achieve a More-Intense Bond in the Arts

Higher Order



Level of Emotional Connection

Lower Order



## Performance Benefit

Generating excitement around functional/factual aspects of the performance

Examples:

- Famous artist
- Well reviewed
- Popular show

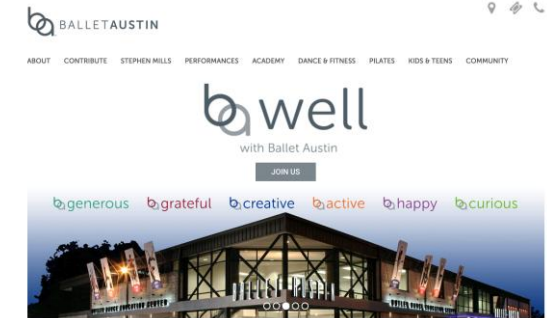


## Emotional Benefit

Drawing attention to emotional aspects of the value proposition

Examples:

- Connect with others
- Experience range of emotions
- Spend time on self care



## Shared Value

Connecting your purpose to beliefs that your target audience holds dear

Examples:

- Everyone deserves to feel a sense of belonging
- Experience range of emotions
- A healthy community starts with healthy minds and bodies

# Characteristics of a Shared Value

## EMOTIONAL

Based on feeling and emotions, rather than programmatic attributes

## HIGHER ORDER

Must have meaning in the consumer's broader life, not just in his or her interaction with the category

## RELEVANT

Must be relevant to the consumer and the category

## CREDIBLE

Reflects something the the brand genuinely embodies or supports

## DIFFERENTIATED

Stems from the qualities that make a brand truly unique

### Dove Shared Value: We Believe Every Body Is Beautiful

*Consumers are their own worst critics. Dove wants consumers to recognize their self-worth.*

✓ Resolves emotional tension

*Consumers believe in the importance of self-care and recognizing broad definitions of beauty*

✓ Rises above the level of the category (soap & lotion)

*Many consumers feel they can't achieve the beauty standards in the media.*

✓ Relates to a brand-relevant cultural theme

*Consumers view Dove as a fixture brand for beauty*

✓ In line with longstanding branding

*Quality ingredients, gentle on skin, price point available to all,*

✓ Stems from the qualities that make Dove unique



# Examples of Shared Values

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Dove exists to celebrate every woman's unique beauty.



Ballet Austin exists to encourage lifelong health and wellbeing.



The Barnes exists to give people from all walks of life access to the transformational improvement possible through appreciation of the arts.



Orchestra of the Americas exists to catalyze social transformations in diverse, underprivileged communities



Woolly Mammoth exists to foster radical inclusion and fight for those whose identities and experiences are marginalized and belittled.

Source: *Grow: How Ideals Power Growth and Profit at the World's Greatest Companies*, Jim Stengel, 2011.



# Separating Your 'Shared Value' from Similar Concepts

## Shared Value

A belief that both our organization and our customers have about a higher purpose, passion, or philosophy that has meaning in our lives beyond our specific genre or the arts in general.

We believe...

We exist in order to...

Every kid deserves access to safe, communal playspace to advance their physical, social, and emotional development.

## Vision

A portrait of a future that could exist if the value you believe in were instantiated in the world and that we intend to work to help create.

Therefore, we want to create a future that looks like \_\_\_\_\_

The future we will work toward is...

We envision a world where every kid has a safe place to play within walking distance of their home.

## Mission

A statement of the path we intend to take to bring that future vision into existence.

We will bring that vision into reality by...

We will end playspace inequity by helping communities to build inspiring playspaces for kids everywhere.

## Values

A set of behavioral principles that we expect our staff, our stakeholders and our outside partners to adhere to.

We behave according to ...

We will seek partners who...

- Equity
- Community
- PLAYce (welcome, safe, fun)



# ...So the Conclusion is This

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Now is the time to know what you stand for  
with enough clarity to take a stand.

# The Consequences Small and Large

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## The Short-Term Opportunity

Aligning messaging around a shared value in the current moment will gain traction.

Telling audiences about your community engagement work will help them understand why they should help your organization right now.

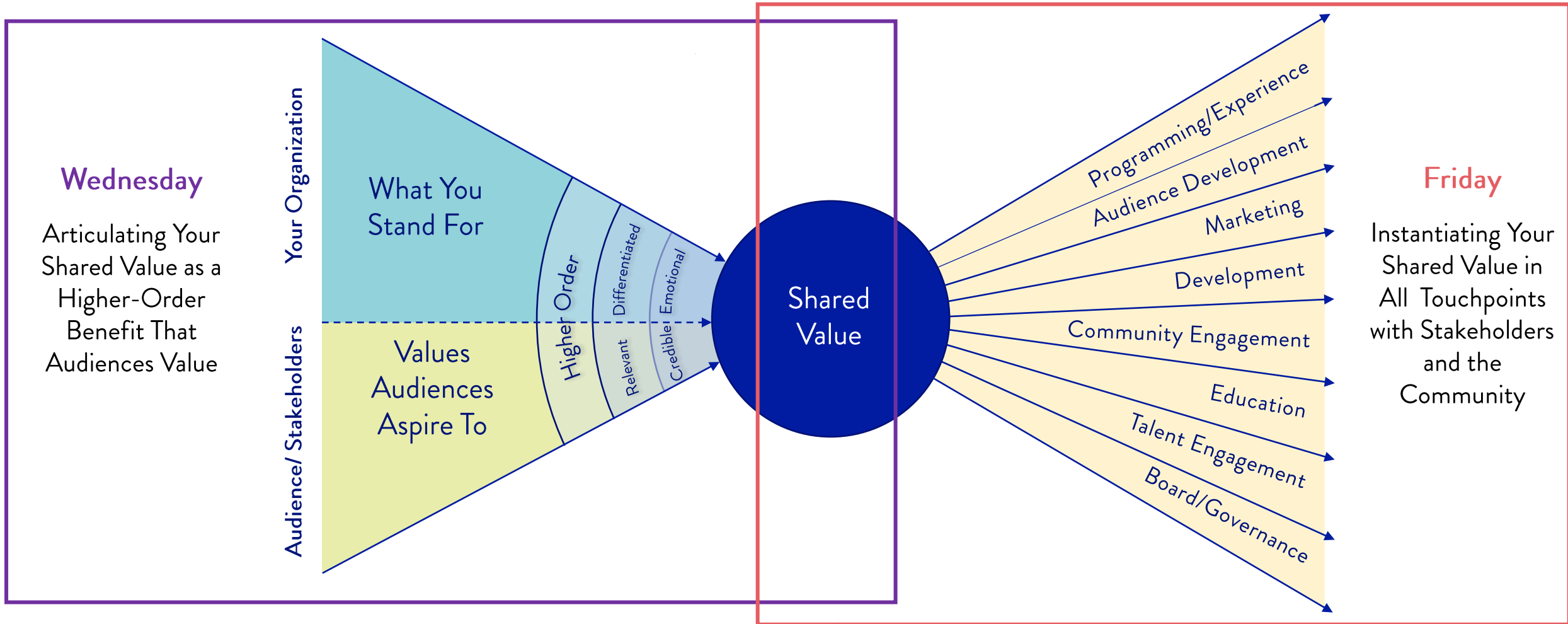
Putting the work you do under a single frame will communicate your organization's meaning more effectively.

## The Long-Term Opportunity

Purpose-driven organizations that **align around shared values** build brand loyalty above and beyond those that focus on functional attributes.

Being purpose-driven means using the shared values statement to make organizational decisions beyond marketing communications, including **partnerships, community engagement, performance experience, digital and philanthropy activities**.

# Building the Purpose-Driven Arts Organization



Sessions are at 9AM or 5PM each day. If you need to switch sessions, email [memberservices@advisoryarts.com](mailto:memberservices@advisoryarts.com)