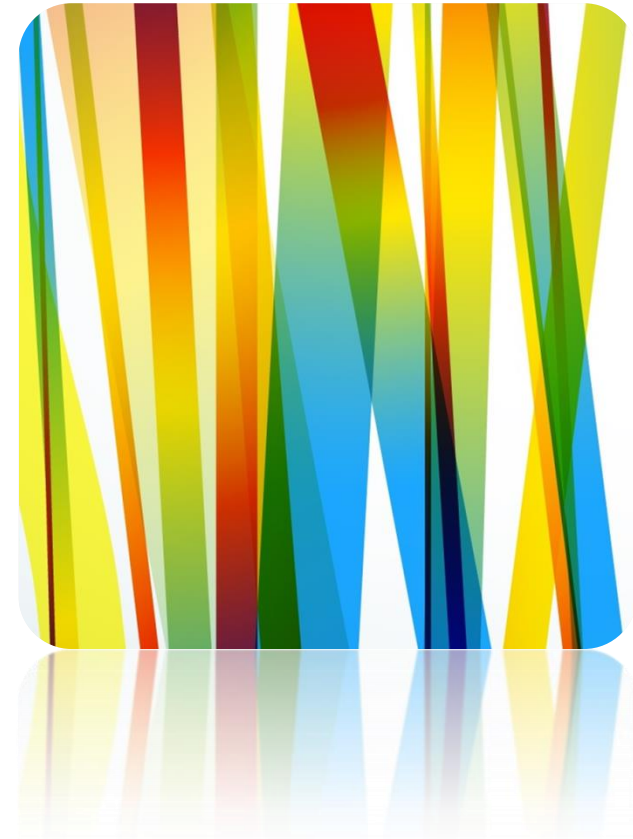


Beyond Attendance
*The True Value of
Performing Arts Presentation*

Pacific Contact
April 4, 2013

Inga Petri





Just when you think you know exactly where to go next ...
the arrow points clearly into the direction you must go.
But this insurmountable obstacle has happened in your way and changes
the course of your next steps into unfamiliar territory.



Or you find yourself taking the faintest of pathways, trusting – hoping – that those who went before, were headed in the right direction: yours!



And there are times when you would happily take the road less travelled –
if only there was a road at all.



How can we navigate uncertain circumstances where the accepted sign posts may no longer be relevant?

Outcomes: **Draw a fresh canvas**

1. **Expand understanding**

- Effective communications
- What business you are in
- Opportunities for leadership

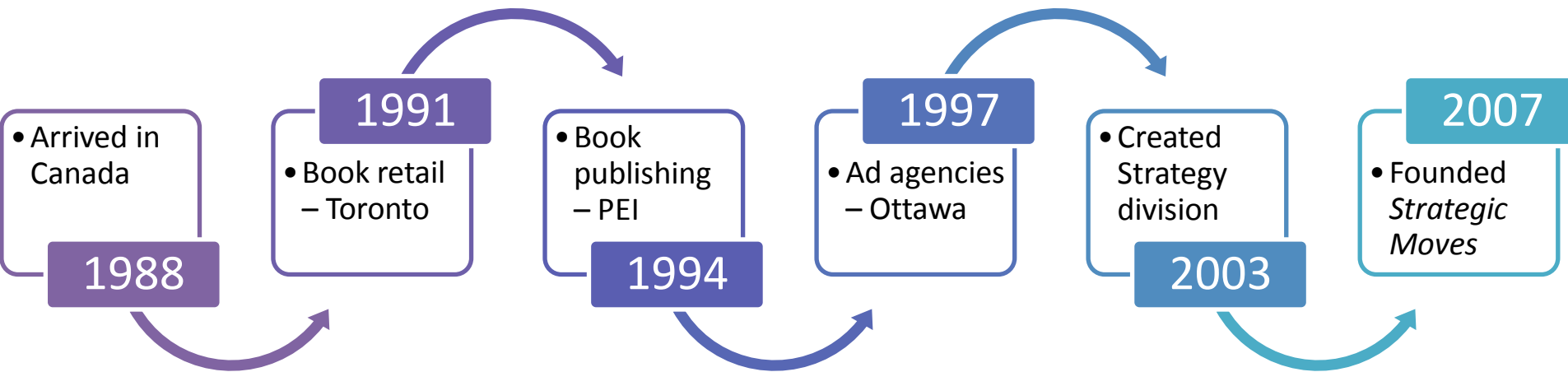
2. **Consider differences between attracting a market and serving a community**

3. **Operational and strategic implications of fundamental (external) forces of change**



About me:

Working at the cross roads of strategy, research and marketing



Value of Presenting (2011-2013)

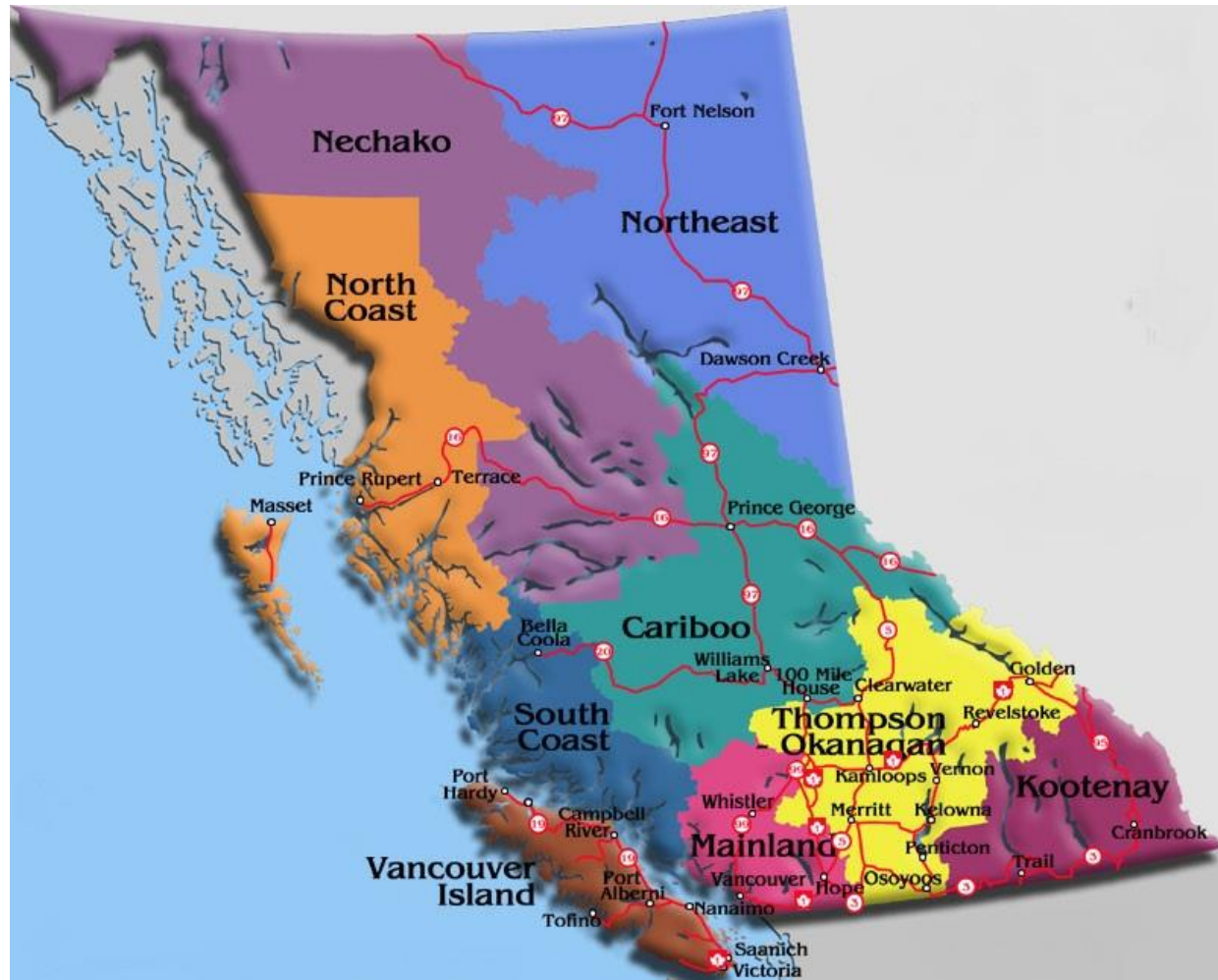
Literature and History
23 workshops - 1,000+
Survey of 288 presenters
Survey of 1,031 Canadians
45 interviews

Clients in culture include

National Arts Centre
Magnetic North Theatre Festival
Culture Days Ontario
Storytellers of Canada
Ottawa Storytellers
Canadian War Museum
Canadian Geographic
MASC
Canada Dance Festival

Your turn

1. Your Name
2. Organization / Location
3. Hope to get out of today **OR** a favourite audience development activity





Communicating effectively

FIRST THINGS FIRST



What does putting a price on art mean?

- **Performing arts are essential to individuals' and communities' health, well-being, quality of life = public good.**
- **Ticket price means we restrict access = lesser public good.**
- **Marketing**
 - Understand purchase decision cycle
 - Brand management
 - Business model

What comes to mind when you hear...

apple



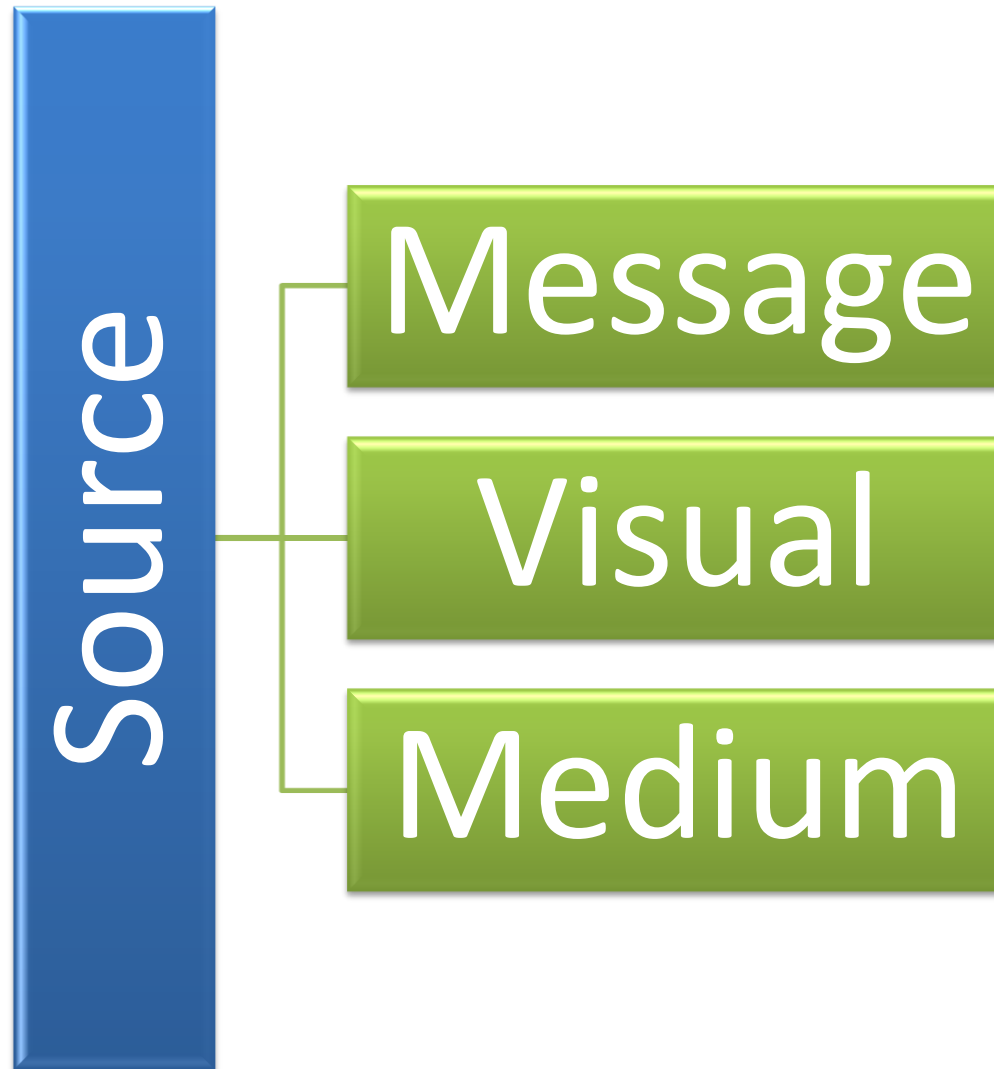
- An apple a day keeps the doctor away
- Forbidden fruit
- Wilhelm Tell
- Isaac Newton
- Gwyneth Paltrow/Chris Martin





What do you associate with Apple today?

What creates a communication?



What creates a communication?

Message

iPod
Welcome to the
digital music
revolution

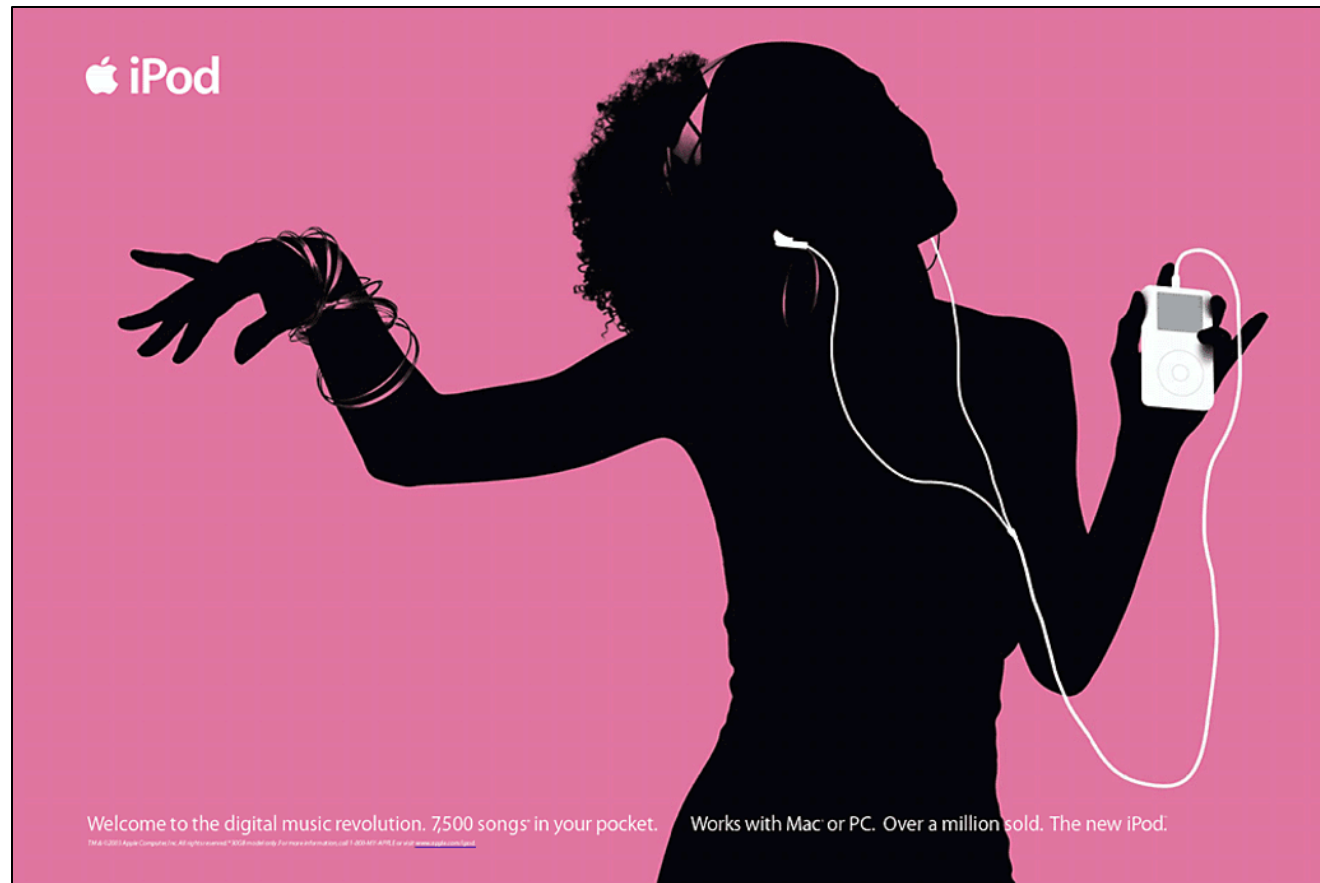
Visual

Iconic imagery
White earphones
Vibrant colours

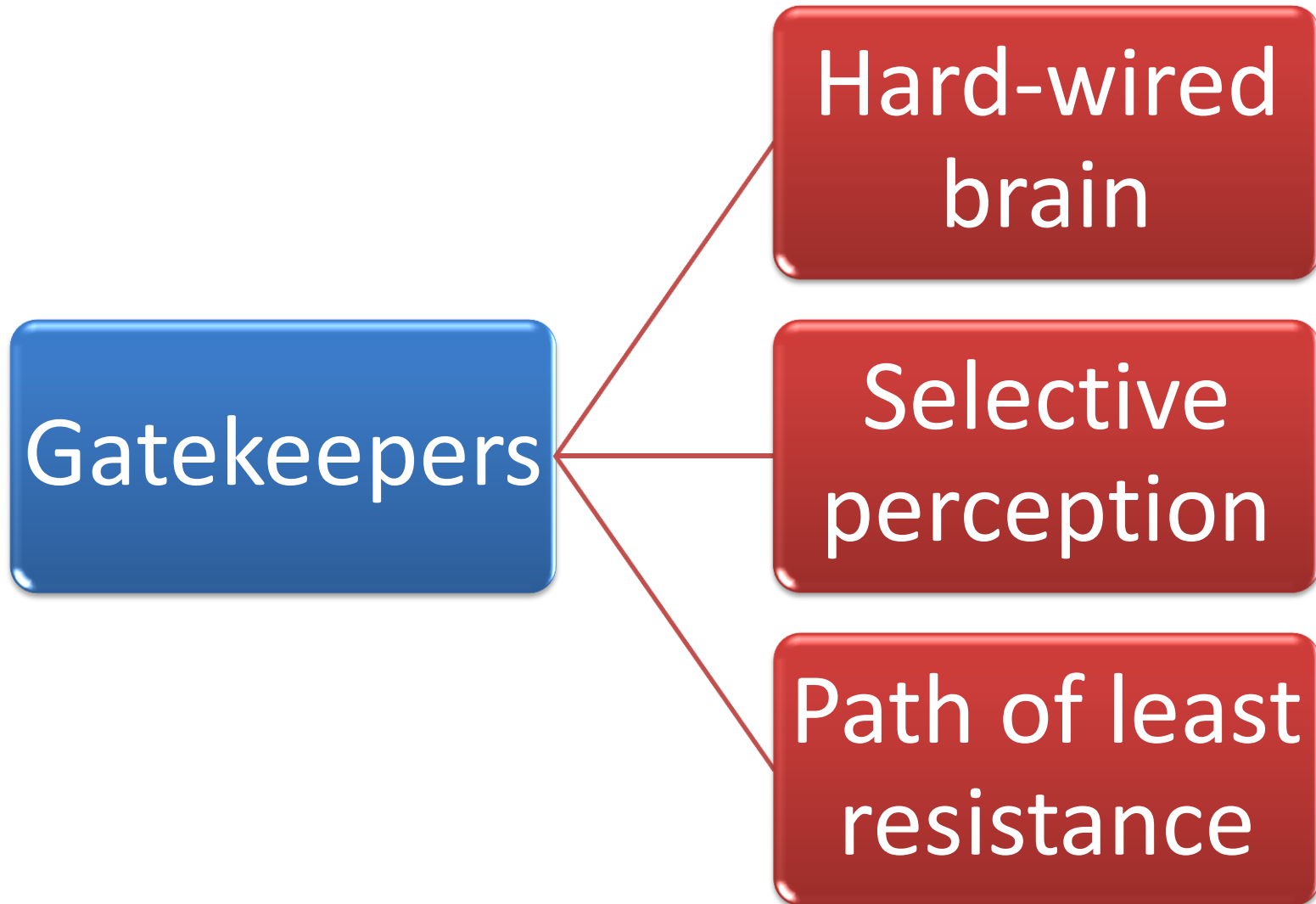
Medium

TV ads: chart
topping bands

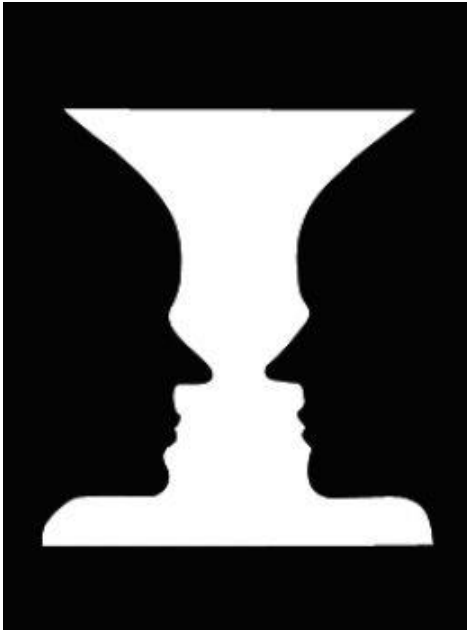
Posters: value
proposition



What gets in the way of communication?



What do you see?



Different people see different things: What the human eye sees is interpreted by the brain in ways that varies from person to person.

Our brain selects and interprets stimuli

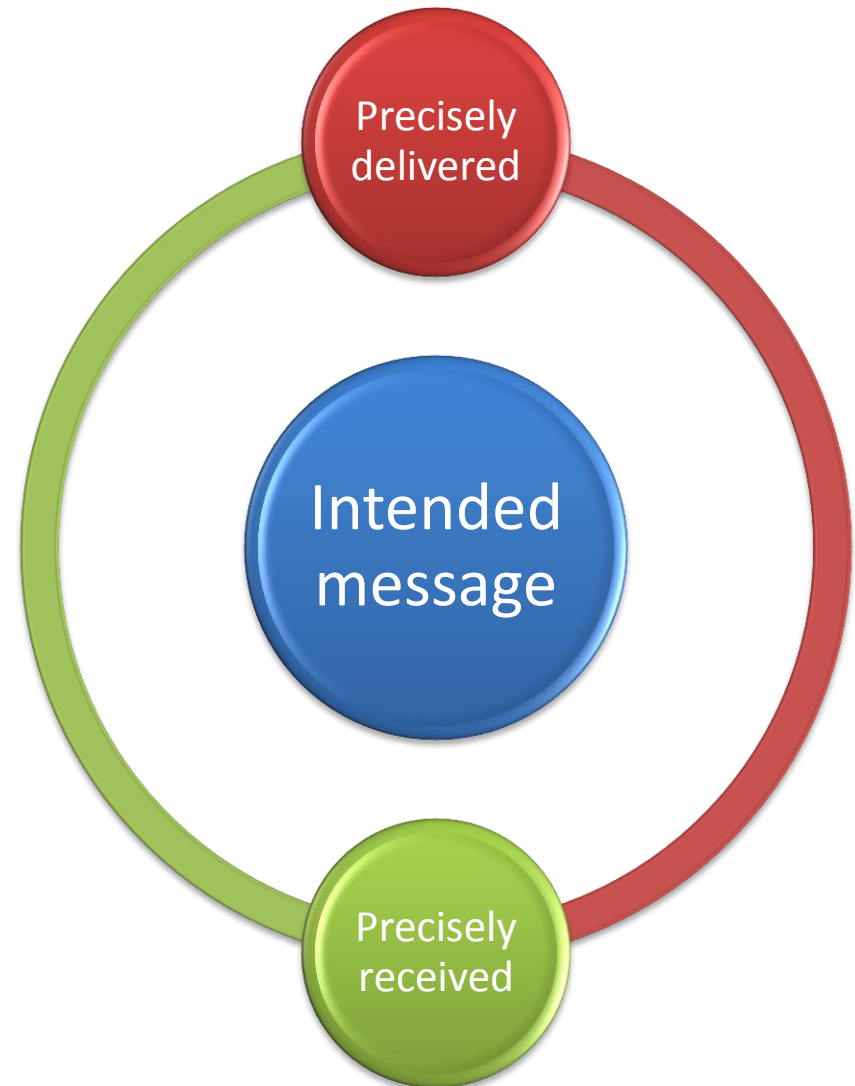
- It's hard wired
- Follows the path of least resistance
- Relates new info to known categories; first impressions are important

Can you read this?

Aoccdrnig to a rseerach sduty at Cmabrigde Uinervtisy, it deosn't mttear in waht oredr the ltteers in a wrod are, the olny iprmoatnt tinhg is taht the frsit and lsat ltteers be in the rhgit palce. The rset can be a ttaol mses and you slitl can raed it wtouhit porbelm. Tihs is bcuseae the huamn mnid deos not raed ervey lteter by istlef, but the wrod as a wlohe.

What is a successful communication?

A communication is successful when it is precisely delivered and the audience precisely receives the intended message.





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MOZART
ET J'EN VEUX PLUS!**

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ABONNEMENT À PARTIR DE 69 \$

What business are they in?

Apple

Nokia

Google

What business are you in?

Small groups

1. In a word or two what business are you in?

2. Therefore, what is your competition?

Break



Proposed performing arts competitive landscape

COMPETITORS	Industry Value Proposition	Arts – Competitive Positioning
Home entertainment	Great stories, high quality in comfort of own home and sound system. Anytime entertainment.	Live action, real stories, your home away from home. Awesome acoustics.
Movie theatres	Great stories, star-powered, escape to the movies, big sound, big screen, pop culture	Real stories – live action Connect with the stars Co-create dance
Spectator sports	Entertainment, action, tribal connection, heroes, victory. Community engagement.	Up close and personal with the stars. Backstage tours, encounters, participation. Artist as hero – Audience as hero.
Spas	Pamper yourself. Wellness, stress reduction, spiritual connection, body connection	Escape to the theatre/symphony. Refresh your mind, body and spirit. Rejuvenate your senses.
Restaurants	Friends. Food. Social. In crowd.	Socialize. Social capital. Vibrant and energetic. Arts vibe.
Video games, Xbox, Wii	Action. Heroes. Play. Relaxation.	Amazing sound, real stories, live action. Be in the middle of the scene.

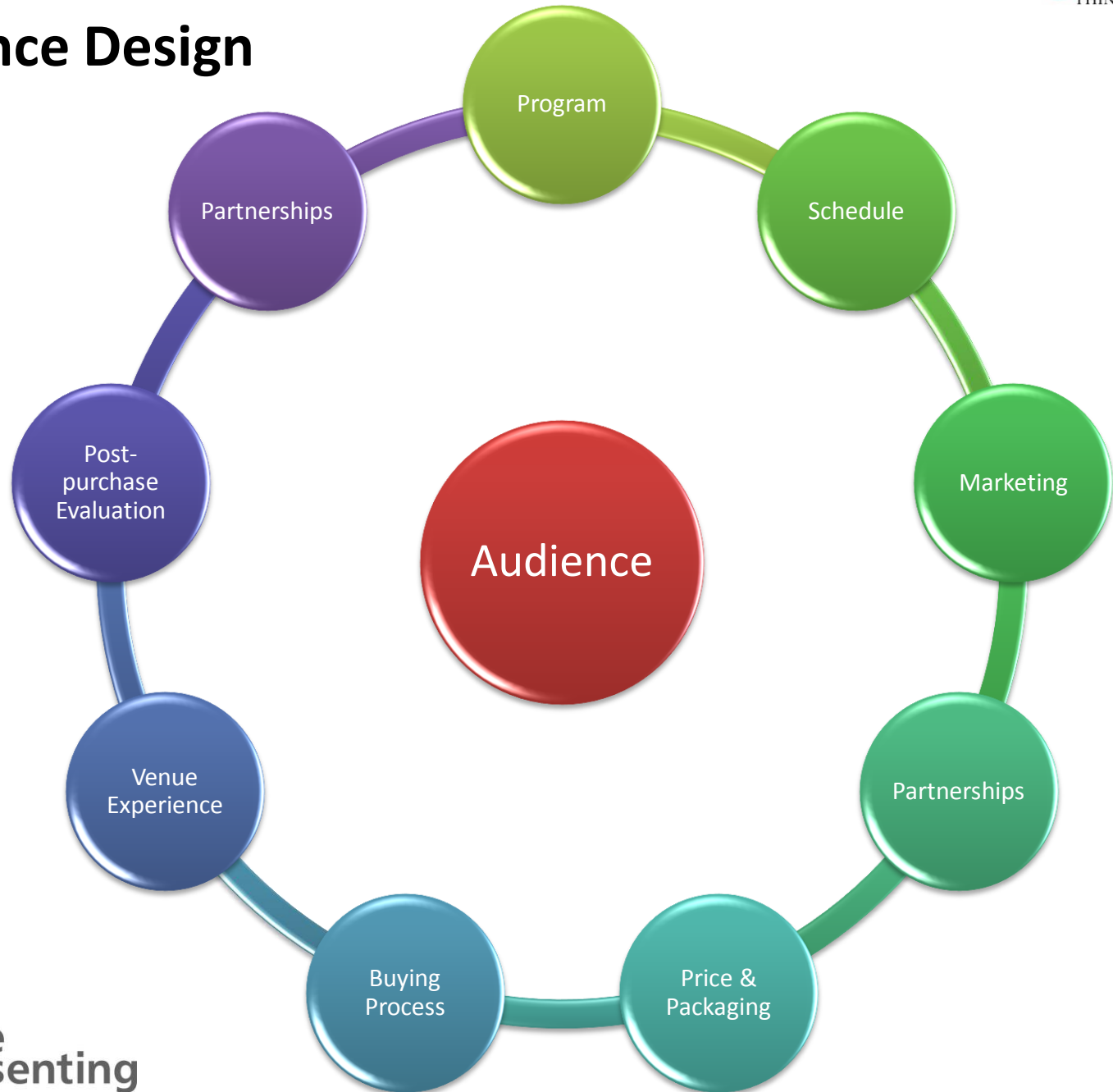
Cirque du Soleil

Case study in reinventing the circus; creating entirely new category

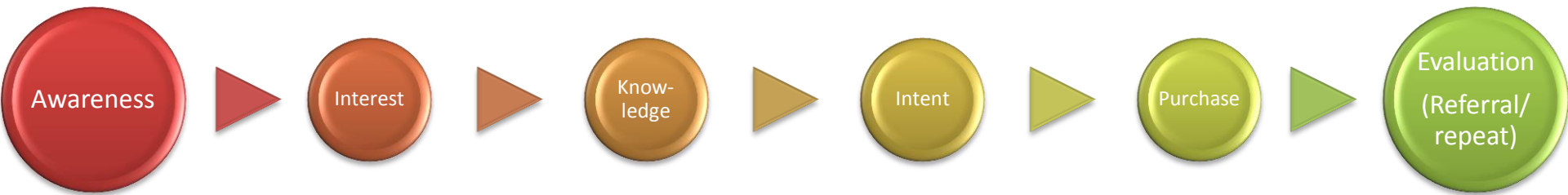
Built a powerful brand



Experience Design



Message construction and audience decision making

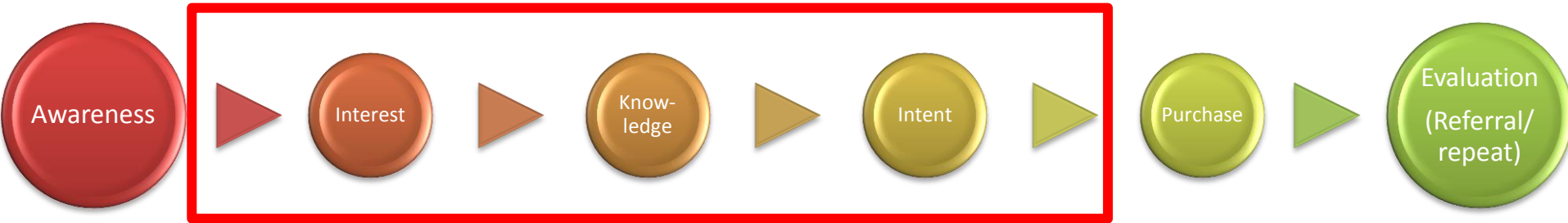


- Most marketing is focuses on **awareness** or **closing the sale**.
- Not enough attention on moving people from awareness to purchase.
- Few in arts focus on **post-show evaluation**, still.

Decision-making dynamics

- **What makes a performance memorable is not necessarily why people buy it in the first place**
 - ***Enough Familiarity*** needed to make buying decision
 - ***Some Discovery and Surprise*** needed to make it memorable, ie build brand/repeat purchase
- **The more “experimental”, “different” or “unfamiliar”, the more the audience wants to be assured about quality and worthiness of experience.**
- **On the surface, audience is largely driven by “entertainment”, “enjoyment”, “relaxation”, and “stimulation.”**

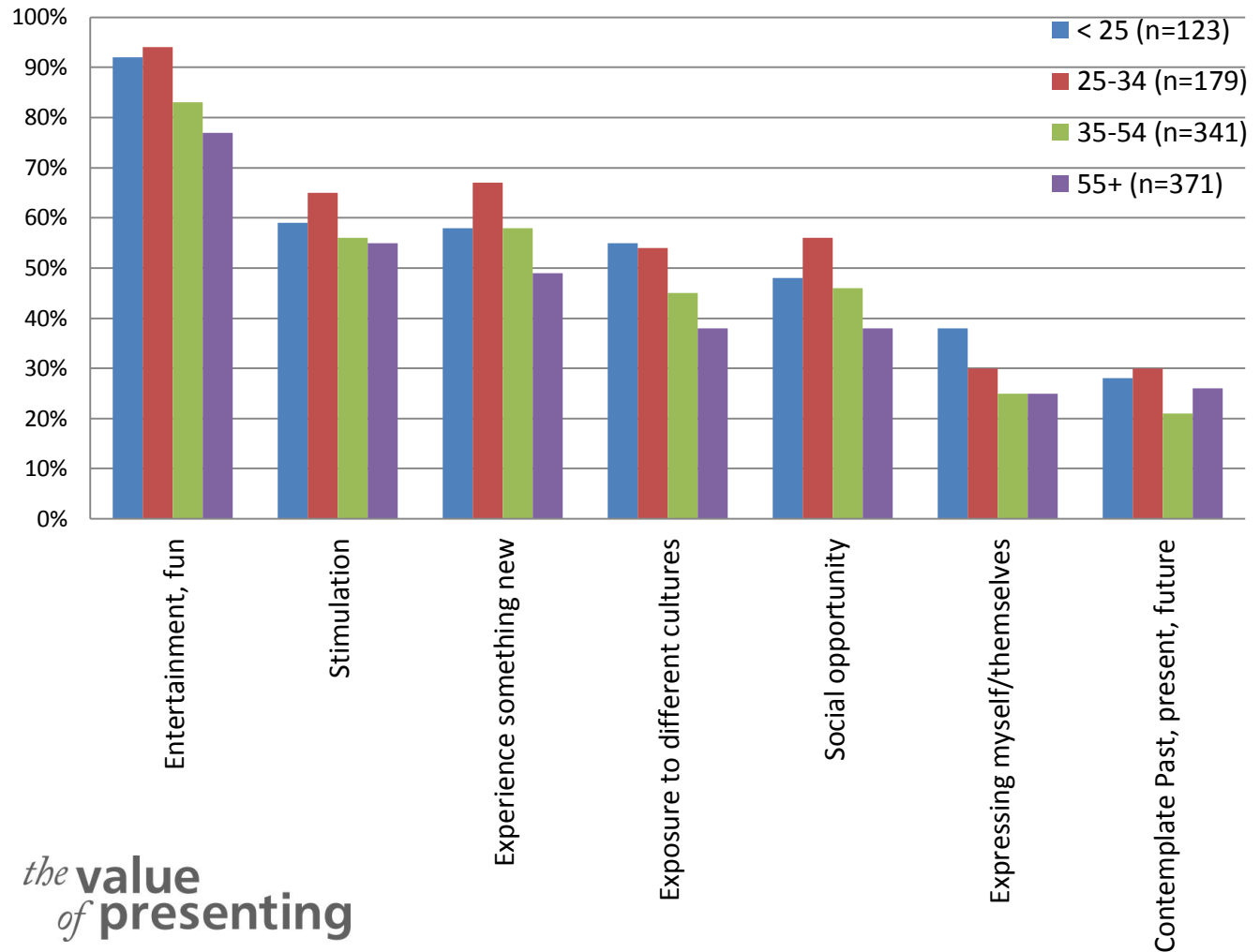
Create familiarity through touch points for the less known



- **Credible** recommendation
- Tell their **Story**
- **Multiple** exposures - longer lead times (much more online)
- Create a street presence (e.g. media stunts)
- Audience wants to become **engaged** with artist (emotional, intellectual)
- Appeal and **quality** of performance
- **Easy** to attend; **affordable**
- **Sampling** (“show me”)

Leverage benefits Canadians identify

Personal main benefits from attending



*the value
of presenting*

Source: Value of Presenting-Survey of the General Public, 2012 (EKOS/CAPACOA)

Benefits to Individuals

- Entertainment, fun
- Stimulation** (intellect, emotion, spirit)
- Experience something new
- Exposure to different cultures**
- Social opportunities
- Health and **well-being**

Benefits to Community

- Energy and vitality**
- Quality of life
- Creative communities
- Understanding** between cultures
- Pride** and belonging
- Community safety

Benefits to Society

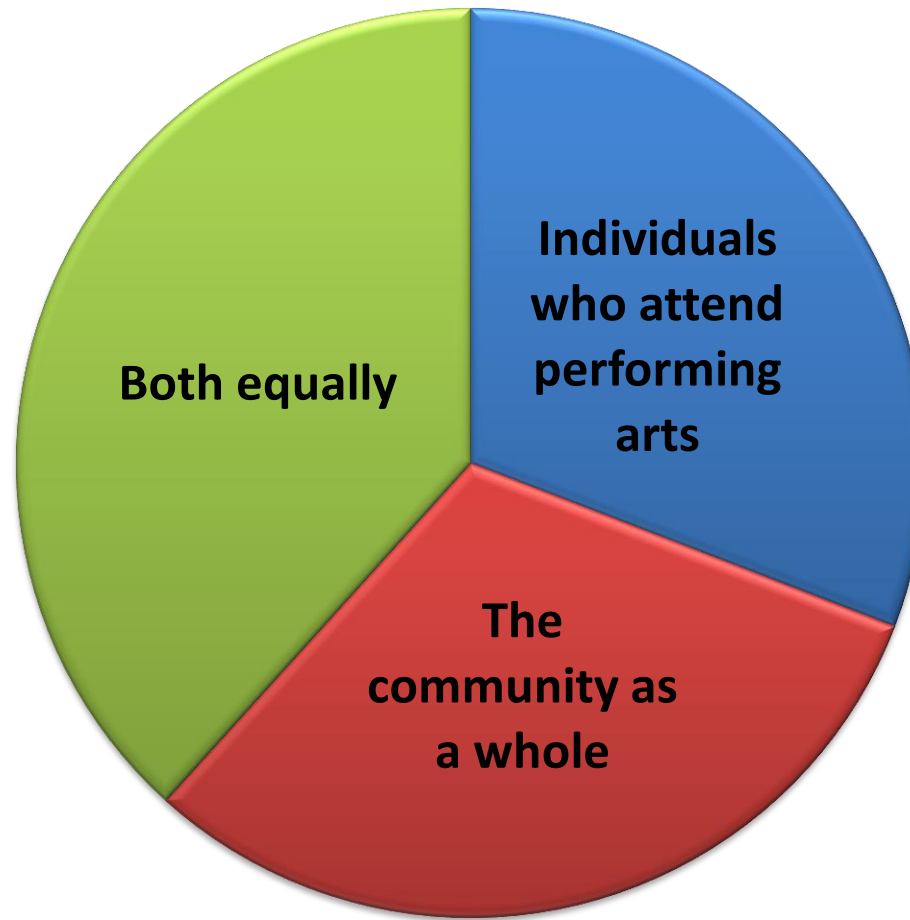
- Volunteering
- Civic engagement**
- Better education outcomes
- Social** cohesion
- Economic **development**

Listening to Canadians: language matters

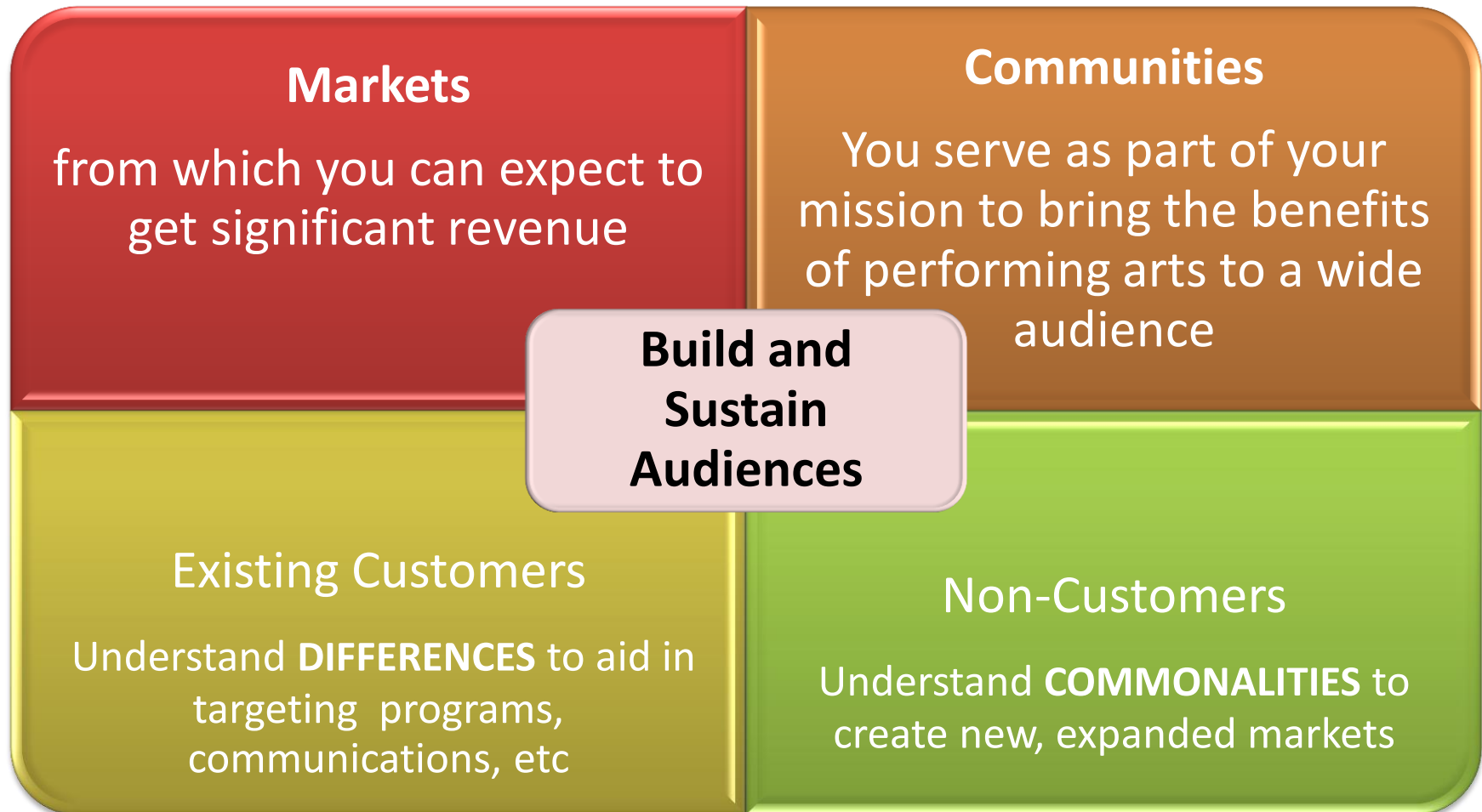
What do you think that the main benefits of having performing arts presentation in the community are? (Up to 3)		As a performing arts presenter, what do you consider the top 3 benefits of your organization to your community? (Up to 3)	
	Canadians (N = 1,031)		Presenters (N=288)
Brings energy and vitality to community	42%	Stronger sense of community identity or community belonging	76%
Improved quality of life and well-being of residents	38%	More creative community	52%
More creative community	37%		
Stronger sense of pride in community (22%) + Stronger sense of identity to community (15%)	33%	Improved health and well-being of individuals and families	30%
Greater economic development in community	32%	Better understanding between cultures	29%
Better understanding between cultures	19%	Increased cross-sectoral collaboration (e.g., business, culture, social services)	27%
Increased partnerships between different organizations in the community	12%	Greater economic development	26%
Better ability to attract and keep skilled workers in the community	10%	Higher civic engagement	22%
Raising public issues and generating public discussion in the community	8%		
Greater safety through increased activity at night	4%	Better capacity to attract and retain skilled workers	9%

Canadians get it

Who benefits from performing arts more?



Audience Segmentation Concepts

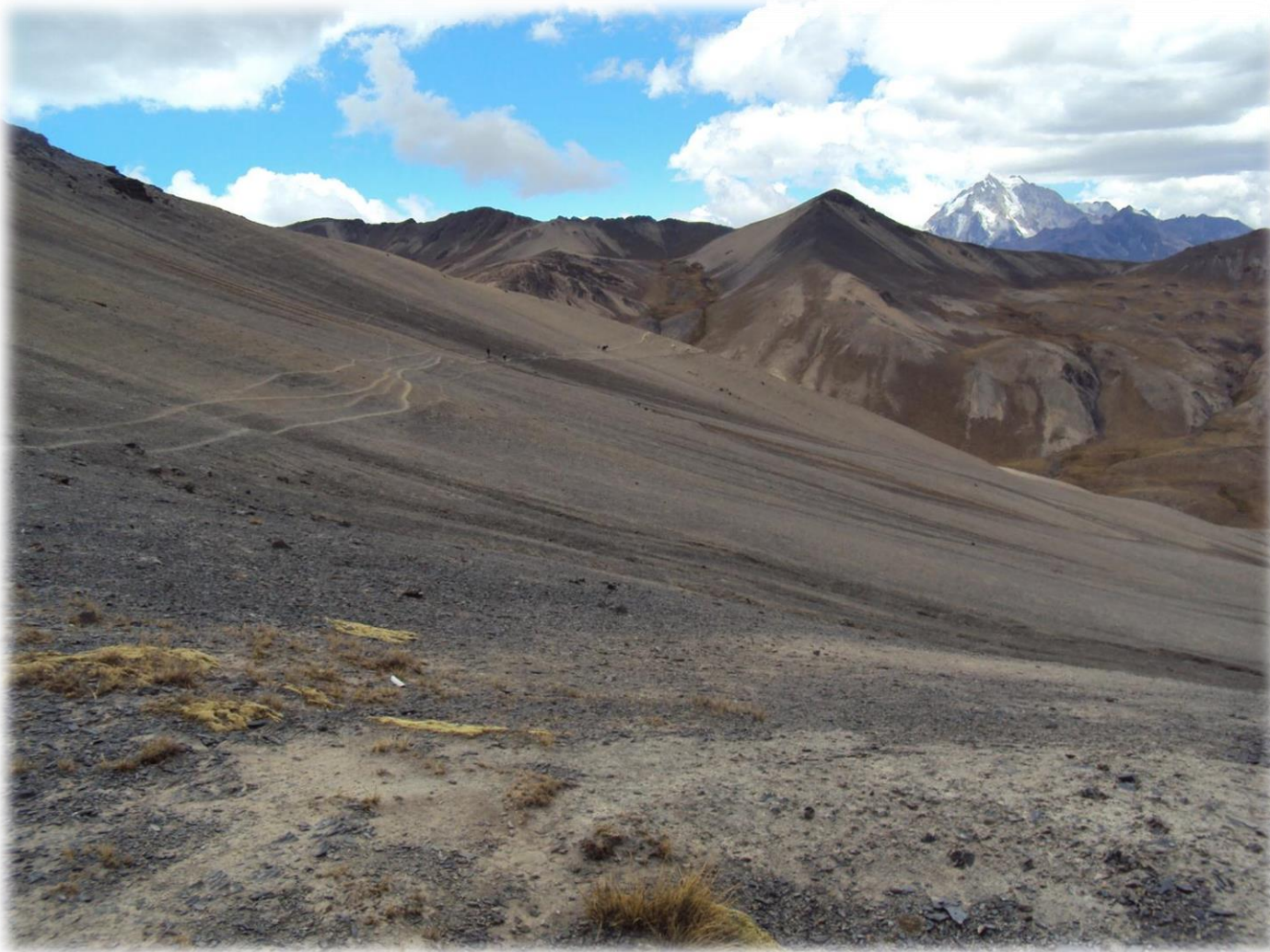


Segments

Small groups

- 1. In light of this discussion how might you approach your markets and your communities differently?**
- 2. What are examples you have of applying this kind of thinking?**

Lunch



Review so far

1. Expand understanding

- Effective communications
- What business you are in
- Opportunities for leadership

2. Consider differences between attracting a market and serving a community

3. Operational and strategic implications of fundamental (external) forces of change



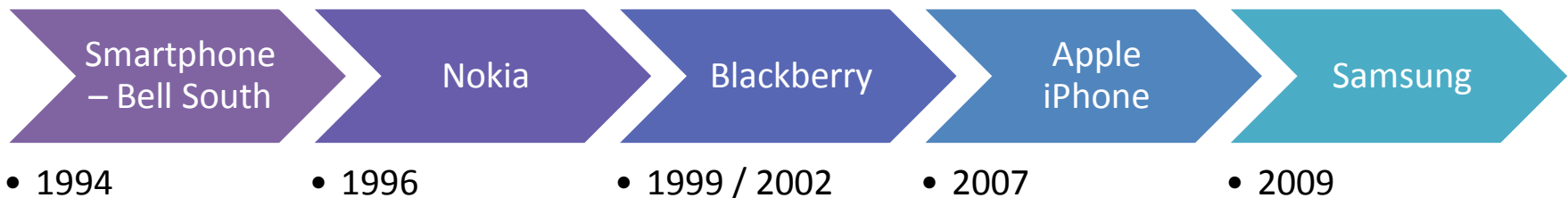
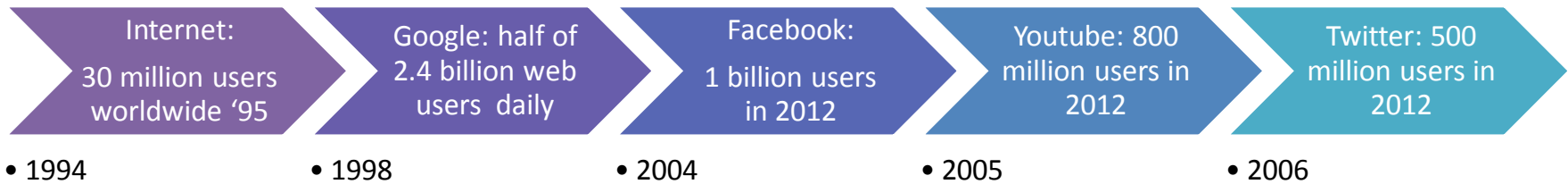
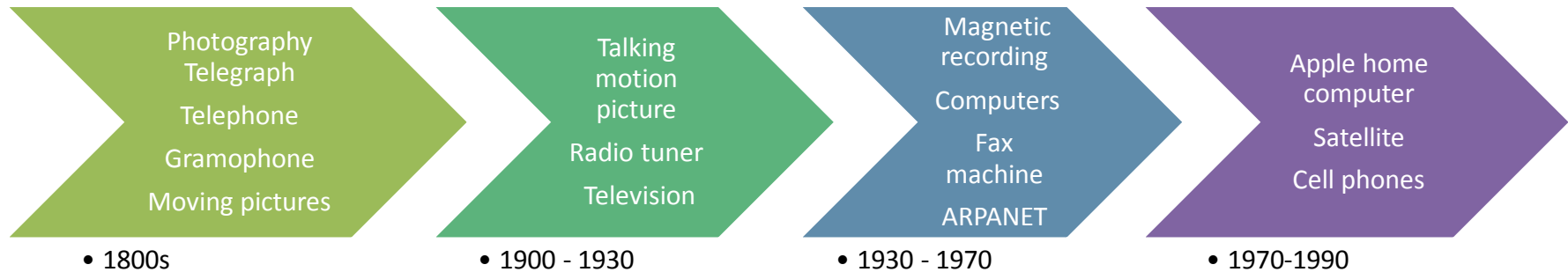


Technology will affect distribution

SWITCHING GEARS



Evolution of Communications Technology

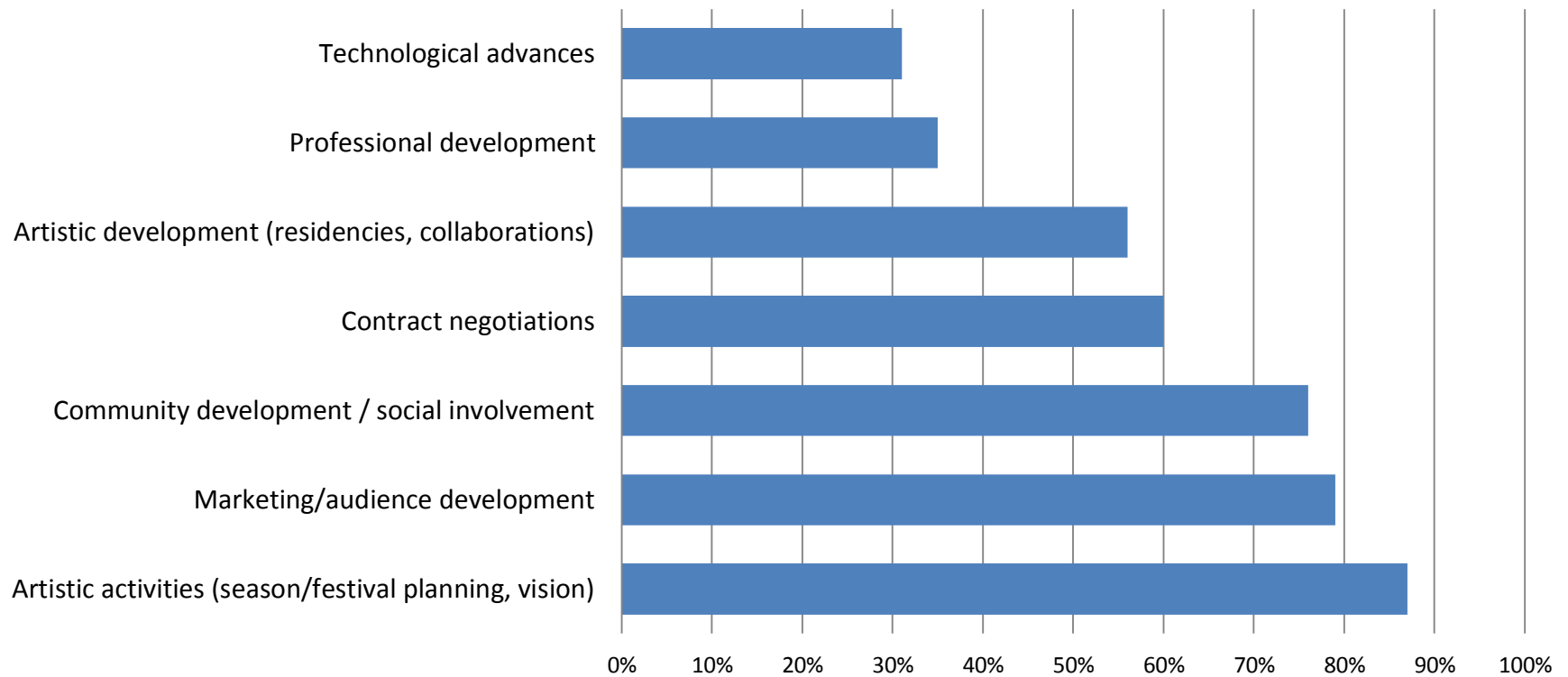


Take note of shifting competitive landscape

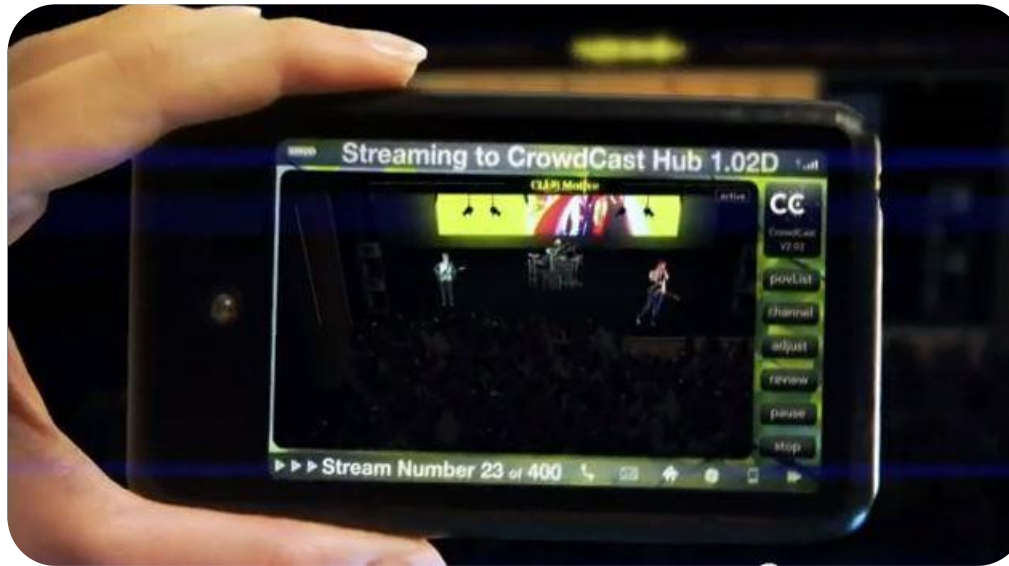
- **Google Android**
 - Samsung #1 globally now
- **Microsoft partners with Nokia**
 - #1 globally from 1998-2012

Presenters are community-minded, fewer worry about technology

High effort dedicated to specific areas (High = 4-5)



4G LTE concept video shows capacity



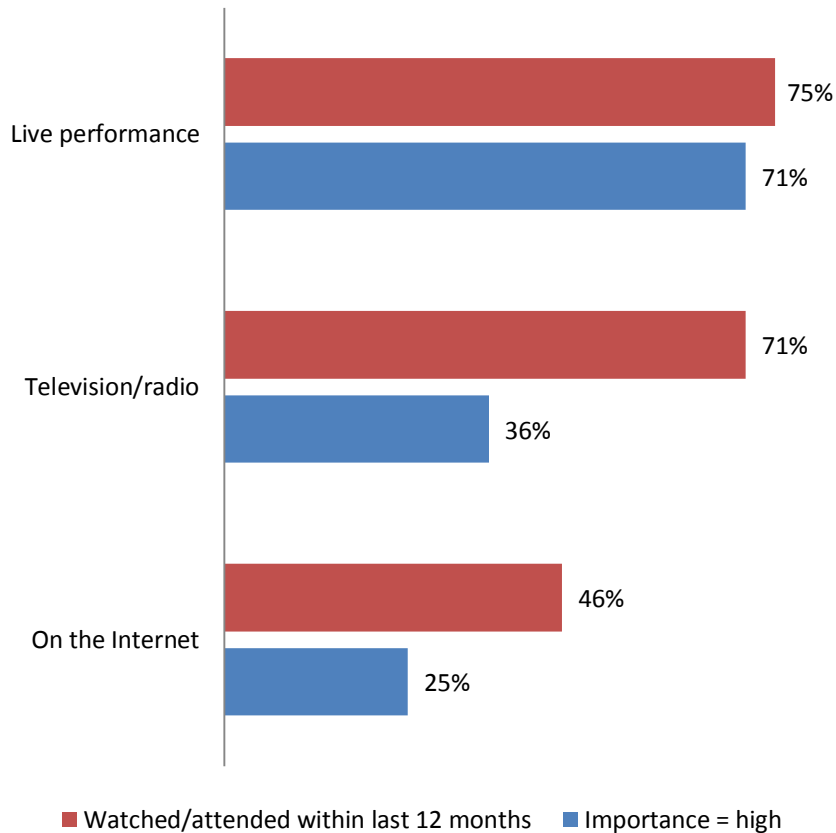
<http://youtu.be/xQDGH9JzZtA>

@ 2:20-3.10

What will this capacity unlock in performing arts?

Media-based viewing augments rather than displaces live performance.

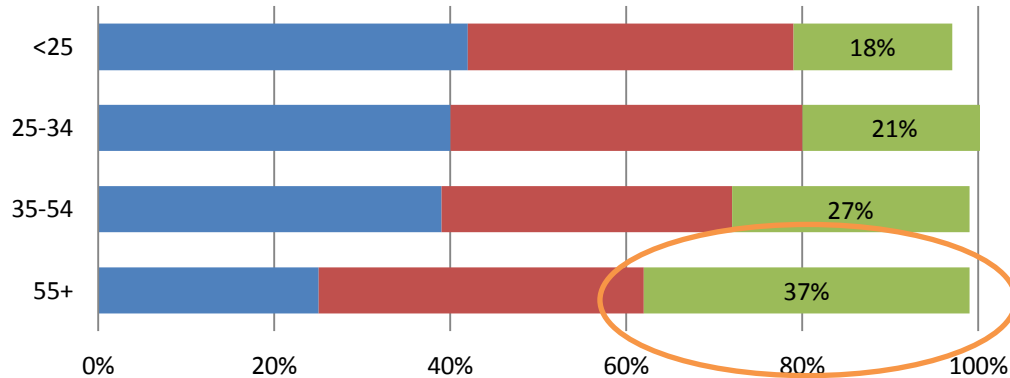
Canadians' live attendance, media-based consumption and its importance



- **Under 35 watch less on TV (~62%) and more Internet (~65%)**
 - Importance of doing so is lower for TV (23%) and same for internet (23%) as average

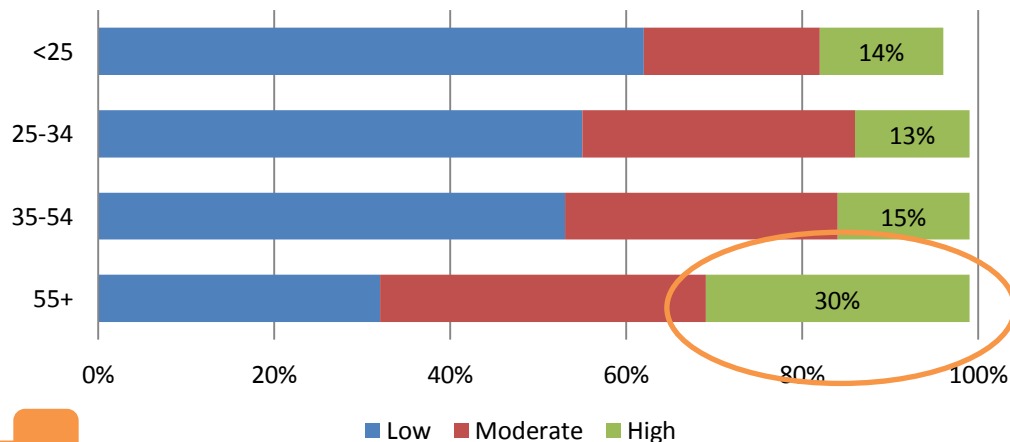
But, definition of “live” is softening

Seeing a show live on television or listening to a show live on radio



Question: How well do each of the following fit your own personal definition of what it means to attend live, professional performing arts?

Seeing a show that was recorded live for you to watch later



A look at music industry evolution

- **Music is alive and well.**
- **Fans have unprecedented access to music and musicians; musicians have unprecedented access to fans.**

- **MuchMusic 1984**
 - Music videos
- **MP3 compression 1993**
- **Internet 1994**
- **Napster 1999 – lawsuits, forced into bankruptcy in 2002**
- **iTunes – 2001**
- **Idol franchise (reality TV) – 2002**
- **Justin Bieber – discovered on YouTube 2008**

Structural changes

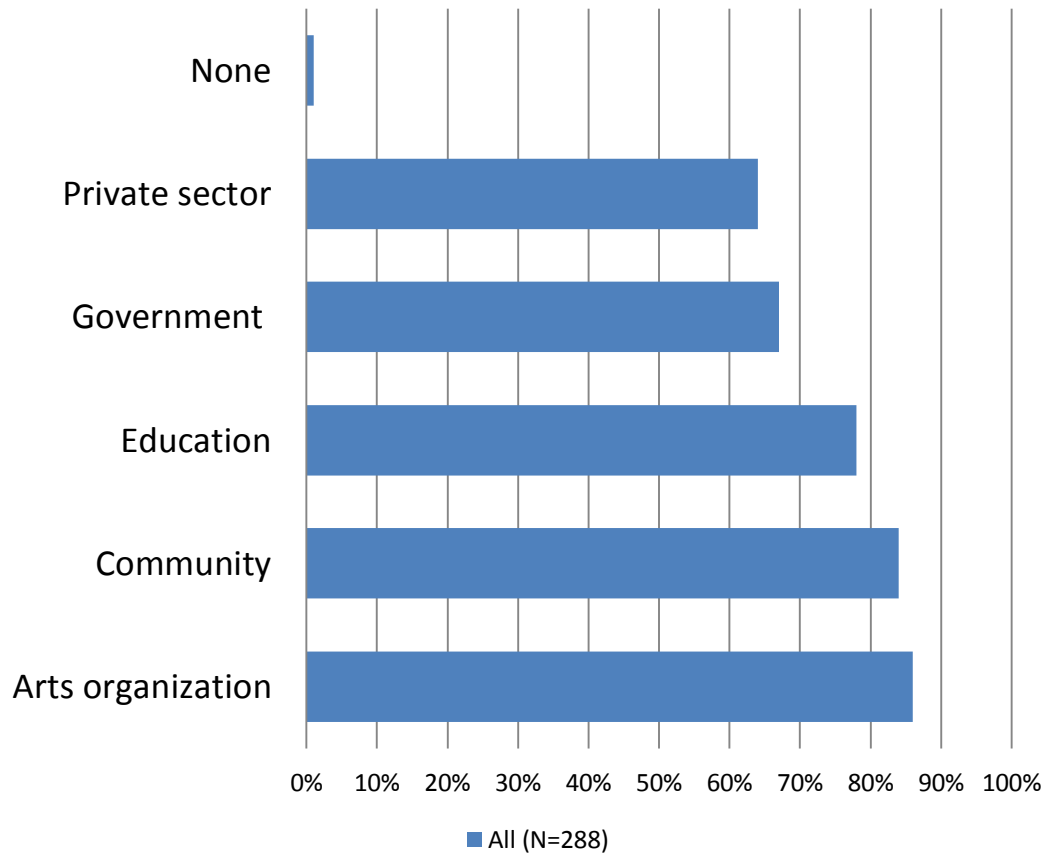
- **Power in the industry has moved toward online distributors and toward musicians themselves**
 - Power of labels has diminished
- **Increased musician-fan interaction**
 - Social: Youtube, Vimeo, Twitter, Facebook
 - Crowd-funding musicians' recordings
- **A music outsider, Apple, has become the largest music vendor in the world**
 - 1 billion songs sold: February 2006
 - 10 billion songs sold: February 2010
 - 15 billion songs sold: June 2011
 - October 2012: 29% of all music sales worldwide; 64% of online sales.

Presenters on technology

- **Current effort on integrating technology in production and communications and as well as future importance of these activities is greater for presenters**
 - With higher budgets
 - More paid staff
 - In cities
- **Presenters and technical stage staff generally feel**
 - Production technologies are well in hand
 - Contemporary and emerging communications technologies can be better used to amplify the live performing arts experience for the audience and community.
- **Opportunities re: reaching audiences via media-based channels and challenges re: business models and success factors**

Presenters strengths: partnerships

Partnerships in last 3 years



- **Intrinsic strength**
- **Non-arts sectors**
 - Social services
 - Immigration/
cultural diversity
 - Health
 - Crime prevention

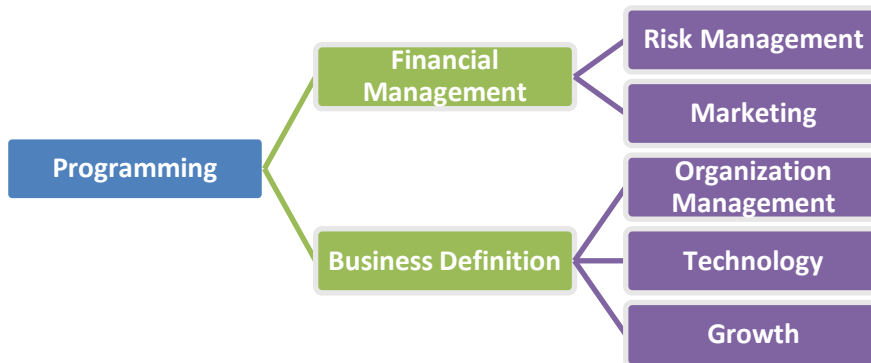
Discussion

To what degree is your current presenting business model resilient in light of these changes?

What changes might increase resilience?



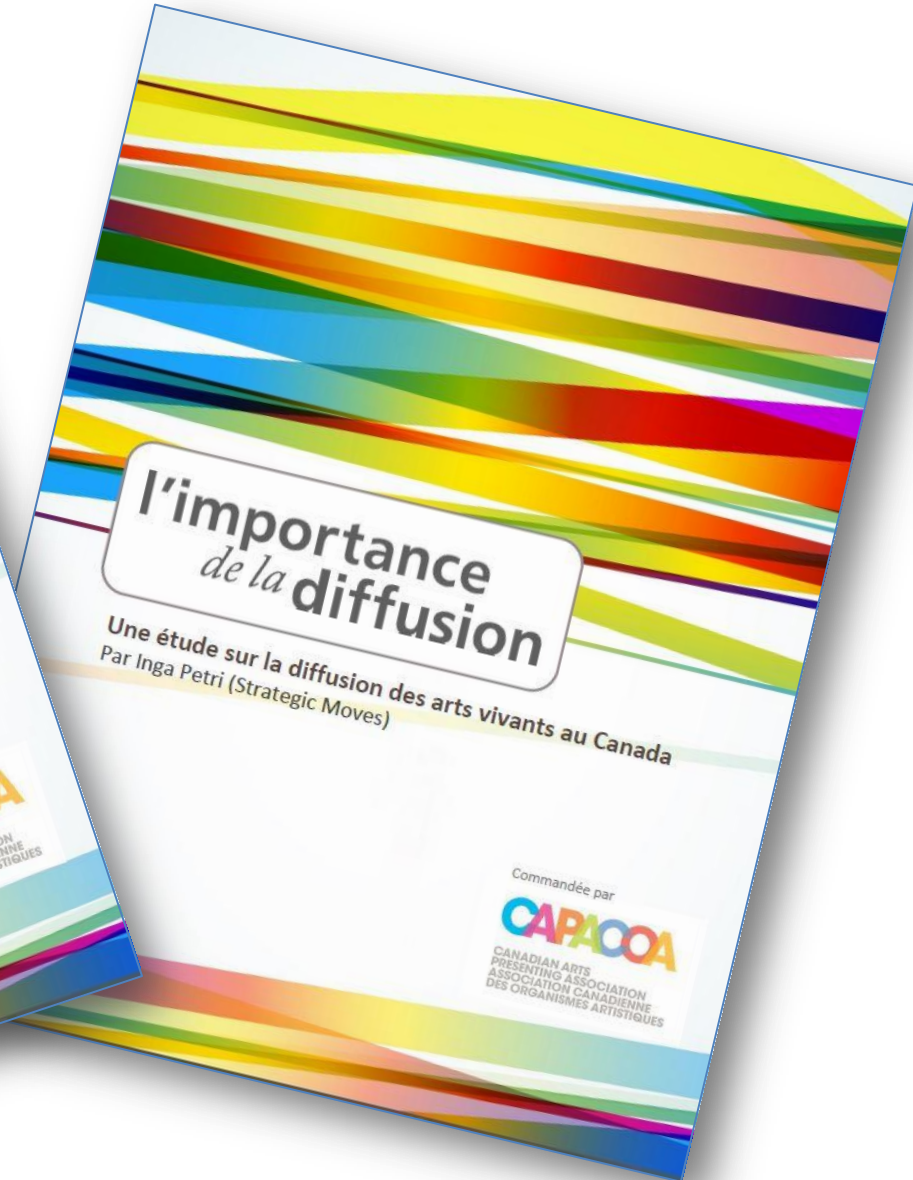
Typical Presenting Organization's Strategic Orientation



2 proposed configuration of organizational strategies



Report Release: April 29, 2013





Get in touch

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613-558-8433

PROJECT SITE: WWW.VALUEOFPRESENTING.CA

Exemplary marketing

- **Concert Milk**
 - <http://youtu.be/oM9ZRLXZBR8>
- **100 musicians, 50 locations, 1 concert**
 - <http://youtu.be/0KGG8Hd0xoY>
- **NAC English Theatre: Metamorphoses**
 - Focus on staging – videos, stunts, media
 - Engage audience: you might get wet = towel promo
 - CTV coverage and videos
 - <http://youtu.be/NbOr15QsOUE>
 - <http://nac-cna.ca/en/stories/series/creating-metamorphoses>

