



VALUE & IMPACT STUDY

SUPPLEMENTARY RESEARCH

Additional Insights on Donors, Ticket-Buyers & Audiences

Commissioned by Major University Presenters with funding support from the Andrew W. Mellon Foundation

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Research Background

In 2004, fourteen members of the Major University Presenters (MUP) consortium - without foundation support - commissioned WolfBrown to conduct a two-year study of the values and motivations driving performing arts attendance and donation. The findings of *The Value & Impact Study* are available in three public reports, which are available for free download at www.wolfbrown.com/mup:

- *Assessing the Intrinsic Impacts of Live Performance*
- *A Segmentation Model for Performing Arts Ticket Buyers*
- *A Segmentation Model for Donors to 12 University Presenting Programs*
- *Value & Impact Study Supplemental Research: Additional Insights on Donors, Ticket-Buyers & Audiences*

While the study concluded in 2007, much knowledge remained to be harvested from the substantial data sets that the study produced. Recognizing the opportunity, the Andrew W. Mellon Foundation funded a \$50,000 proposal from the MUP consortium to extend the value of the study's two major datasets by commissioning 10 focused research papers.

WolfBrown oversaw a competitive selection process starting in October 2007 and welcomed proposals from faculty, research staff and students from all colleges and universities, and all disciplines. The proposals were evaluated based on the significance and relevance of their topic and research questions, the extent to which the research was likely to yield practical applications for the study partners – particularly in the areas of marketing and fundraising, and overall quality and rigor of the proposal.

The funded proposals went to both faculty members and graduate students; five proposals had faculty members serving as the principal investigator (PI), and five had graduate students as PI. The funded researchers represent a broad range of academic departments – public policy; sociology, tourism, recreation and sports management; arts administration; marketing; and business – and a variety of universities.

On behalf of the MUP consortium, we extend our appreciation to the Mellon Foundation for their foresight in allowing *The Value & Impact Study* to pay additional dividends. We encourage other researchers who would like to examine the original data files to be in touch with us, in the spirit of learning.

Sincerely,



Alan S. Brown, Principal



Jennifer L. Novak, Consultant

Overview of Papers

The supported research papers fall into three general topics: Donors, Ticket-buyers & Demand, and Impact. In addition, three papers cover special areas of interest: the relationship between Howard Gardner's multiple intelligences and ticket-buying, the affect of pre-performance enhancement events on impact, and the relationship between political views and both donation and ticket-buying behavior. Below are brief summaries of each paper, which are followed by more detailed abstracts, organized by general topic.

Donors

1. **The Influence of Marketing Messages and Benefits Received On Attributions of Donation Behavior to Intrinsic and Extrinsic Motivations** - *Jennifer Wiggins Johnson & Bret Ellis*. This paper seeks to better understand what influenced the degree to which donors perceive extrinsic benefits as the motivations for giving.
2. **Study of MUP Donors Motivation, Behavior, and Benefits** - *May Kim, Yong JaeKo & Heather Gibson*. This paper provides a review of theoretical frameworks that guide current perspectives on donor motivation.

Ticket-Buyers & Demand

3. **Preferences and Purchase Behavior: Survey Evidence on the Relationship between Stated Interested in the Performing Arts and Ticket Purchase History** - *Sarah Lee*. This paper examines the relationship between individuals' stated preferences for performances and their actual history of ticket-buying.
4. **Community Contexts of University Presenters and Their Audiences** - *Tanya Koropecjy-Cox, Charles Gattone, William Jawde, & Deeb-Paul Kitchen*. This paper offers broader sociological perspective to the understanding of audience values and preferences, by considering the larger community contexts of the presenter-audience relationship.
5. **Anticipation: Exploring its Origins and Effects on the Live Arts Experience** - *Jara Kern*. This paper examines the causal factors and relationships underlying high levels of anticipation for performing arts programs.

Impact

6. **How We Feel About Art: Motivation, Satisfaction, and Emotional Experience in Performing Arts Audiences** - *Shelly Gilbride & David Orzechowicz*. This paper explores performing arts audiences' self-reported emotional experiences and how they relate to reasons for attending, expectations for, and satisfaction levels with a performance.
7. **Social Influences on Intrinsic Impacts of Performance** - *Trina Rose*. This paper examines the relationships between social and emotional factors and attendance, subscription and post-performance impact.

Special Interest Topics

8. **Analysis of Multiple Intelligences in Understanding the Relationships between Ticket Buyers and Their Participation in Performing Arts Programs** - *Mark Creekmore & Sarah Rush*. This paper examines the validity of using the Values & Impact data to study Howard Gardner's theory of multiple intelligences and investigates relationship between intelligences and preferences for types of performances.

9. **Characterizing Program Enhancement Events** - *Yael Zipporah Silk & Jordan Raphael Fischbach*. This paper profiles the enhancement event audience base, examines the impact of enhancement events on patrons who self-select to attend, and identifies characteristics that are predictive of pre- or post-performance event preferences.

10. **How Beliefs Matter: Views, Motives and their Relation to Buyer and Donor Behavior** - *Ximena Varela*. This paper investigates audiences political beliefs and explores the relationship between political views and both ticket-buyer and donor behavior.

Abstracts

Donors

1. The Influence of Marketing Messages and Benefits Received On Attributions of Donation Behavior to Intrinsic and Extrinsic Motivations

Jennifer Wiggins Johnson & Bret Ellis

Wiggins Johnson and Ellis examine the intrinsic and extrinsic motivations of donors to performing arts organizations using the data from the 1,771 donor respondents from the *Value Study* conducted in October 2006. The authors use the twenty items measuring different motivations to donate from these respondents, along with information on their donations from 2003-2006 and their relationships with the presenters to which they had donated. This paper seeks to better understand what influenced the degree to which respondents would perceive extrinsic benefits as the motivations for their donations. Additional data on the communications messages that respondents were likely to experience and the benefits that they were likely to receive in exchange for their donations is used to establish that the messages and benefits that donors receive can influence their attributions of their donation behavior to intrinsic and extrinsic motivations. This suggests that organizations can deliberately or inadvertently influence donor motivations through their communications.

2. Study of MUP Donors Motivation, Behavior, and Benefits

May Kim, Yong Jae Ko & Heather Gibson

In this paper, the authors offer a review of theoretical frameworks that guide current perspectives on donor motivation and its influence on donor amount or donor benefits. Using this review to structure their analyses, the authors explore donor motivations, the influence of gender and age on donor motivations, the relationship between donor motivations and donor behavior, and the relationship between donor motivations and donor benefits.

In addition, these authors wrote a second paper utilizing the Value & Impact Study data entitled *An examination of factors that influence donor behavior: The case of University art museums in the US*, and is available upon request.

Ticket-Buyers & Demand

3. Preferences and Purchase Behavior: Survey Evidence on the Relationship between Stated Interested in the Performing Arts and Ticket Purchase History

Sarah Lee

In this paper, Lee uses the Major University Presenters' *Value Study* dataset to examine the relationship between individuals' stated preferences for performances across a variety of performance types and their actual history of purchasing tickets to performances of those

same types. The author finds that there is a substantial proportion of the arts-going population who exhibit strong preferences for various types of performances, but whose ticket purchase behavior alone would not reveal those preferences (“high-demand non-purchasers”). Lee then develops a profile of high-demand non-purchasers in each performance type, focusing on the differences between high-demand non-purchasers and purchasers in demographic and background characteristics, cultural attitudes, and motivations. This paper briefly surveys the literature on participation, audience-building, and marketing in the arts; discusses the data used for this analysis; presents simple statistical evidence on the relationship between stated preferences and ticket purchase history; profiles high-demand non-purchasers, and uses these profiles to draw conclusions about potential barriers to attendance among high-demand non-purchasers.

4. Community Contexts of University Presenters and Their Audiences

Tanya Koropeckyj-Cox, Charles Gattone, William Jawde, & Deeb-Paul Kitchen

This paper builds on the original *Value & Impact Study* analyses by adding two important sociological perspectives to the understanding of audience values and preferences, taking into account the larger community contexts of the presenter-audience relationship. First, focusing on social and cultural characteristics, the authors construct an alternative audience segmentation model that draws more specifically on sociological research on social capital and engagement, socioeconomic dimensions of taste, and subculture affinities. The authors examine how an audience segmentation model based on social attributes and cultural affinities can help to elucidate audience preferences and potential attendance. Second, they incorporate data on the specific community contexts of the Major University Presenters (and their potential audiences) to examine the influence of contextual dimensions on the relations of audience characteristics with preferences and attendance. Specifically, the research addresses the following research questions:

- 1) What kind of audience segmentation results from an explicit emphasis on measures of social engagement, institutional connection, and cultural affinities?
- 2) How is this socially based segmentation related to socio-demographic characteristics and to particular audience preferences and potential attendance at performances?
- 3) How does this relationship intersect with characteristics of the larger communities in which the audience members and the University Presenters are located?

The findings offer a nuanced assessment of audience preferences within their particular communities and inform strategies for planning, marketing, and outreach that take into account contextual variations. The findings also help to inform policy and arts development by considering the interrelations of communities, institutions, and audience populations.

5. Anticipation: Exploring its Origins and Effects on the Live Arts Experience

Jara Kern

For almost any presenter of the live performing arts, *captivation, satisfaction, and remembered value* are the gold standards of a job well done. Audience members and artists who experience a powerfully positive impact during the event, and remember the moment vividly for years to come, become the favored stories of success among most arts presenters. These remembered experiences provide the catalyst for future attendance and increasing connection to the organization and its work. Yet, despite the core importance of captivation,

satisfaction, and remembered value, precious little specific research has explored where these experiences come from, how they work, and how they might be more thoughtfully encouraged. This paper is an effort to encourage such understanding and strategy. Its particular focus is on the role and influence of anticipation on the perceived satisfaction and remembered value of a live performance experience. This paper suggests and tests a causal model, examines findings from relevant literature, and incorporates interviews with audience members, practitioners, and content experts. The paper aims to provide performing arts practitioners with actionable insights on anticipation, and its central function in fostering satisfaction and remembered value in the live performing arts. This paper focuses on the relationship between cause and effect, or the causal flow, for the creation of high levels of anticipation for cultural content.

Impact

6. How We Feel About Art: Motivation, Satisfaction, and Emotional Experience in Performing Arts Audiences

Shelby Gilbride & David Orzechowicz

Using data collected from the *MUPS Value & Impact Study*, Gilbride and Orzechowicz explore the dimensions of self-reported emotional experiences in performing arts audiences. Specifically, the authors look at how these emotional experiences relate to the reasons people attend productions, the expectations they bring with them, the relevance of the performing arts to their daily lives, and their satisfaction with a show. Gilbride and Orzechowicz conduct the first analyses of the qualitative emotions data available from the study and construct ten broad categories of emotional experiences, with an additional six subcategories to provide a more nuanced understanding. These categories are based on the work of Robert Plutchik's categorization of basic and secondary emotions, as well as other research on emotion typologies. The authors then explore the relationship between these experiences and audience demographics, performance genres, and reported levels of captivation and satisfaction. Much of the analysis focuses on five specific emotional experiences: anger, dissatisfaction, fear, inspiration, and joy. The research reveals that certain emotional experiences often seen as negative in most social situations, such as fear and anger, are associated with higher levels of satisfaction and repeat arts consumers. "Positive" emotions like joy, on the other hand, are associated with lower levels of satisfaction and audience members who were out of their comfort zone. The authors speculate on the meaning of these associations and their relevance to the performing arts community.

7. Social Influences on Intrinsic Impacts of Performance

Trina Rose

There have been a number of studies regarding audiences of cultural arts. Lacking, however, is the knowledge of social and emotional factors of these audience members. What social and emotional factors predict attendance and subscription? For example, is the person or persons one attends a performance with related to their post performance impacts? The author explores this question and other gaps in the literature in more detail. To engage in this investigation, this paper uses cross-sectional data from *The Value & Impact Study* and conducts a series of path analyses to gauge whether these social factors are related with post-performance impacts, and whether these emotional factors are associated with subscription

and attendance. Results indicate that patrons' reasons for attending a performance, social factors, and ticket price were significantly related to post-performance impacts. Additionally, post-performance impacts were significantly related to attending live performances and performance discipline.

Special Interest Topics

8. Analysis of Multiple Intelligences in Understanding the Relationships between Ticket Buyers and Their Participation in Performing Arts Programs

Mark Creekmore & Sarah Rush

The concept of multiple intelligences (MI) has been used in educational settings, but it can also be used to differentiate arts' patrons by their different abilities, sensibilities and orientations. The hope is that this knowledge may be used to create more specific communication and marketing tools and identify ways to understand and address the preferences among different kinds of patrons. Using the Values Survey from *The Value and Impact Study*, nine forms of MI (Linguistic, logical-Mathematical, Bodily-Kinesthetic, Musical, Spatial, Naturalist, Interpersonal, Intrapersonal, Existential) are examined in relation to other patron characteristics, including demographic information, inner-directed values, outer-directed values and performance preferences. A considerable portion of this research focused on validating the nine intelligences, identifying relations with performance preferences and investigating differences across the study sites.

9. Characterizing Program Enhancement Events

Yael Zipporah Silk & Jordan Raphael Fischbach

Offering enhancement events is often viewed as a way to draw in casual audiences, provide them with knowledge they may not already have, and in turn positively impact their future participation. This paper profiles the enhancement event audience base, examines the impact of enhancement events on patrons who self-select to attend, and identifies characteristics that are predictive of pre- or post-performance event preferences. Utilizing data from two patron surveys, the authors analyze mean preference for enhancement events to create profiles of enhancement event attendees. Next, they examine mean outcomes for patrons who attended specific pre-performance events and performed a difference-of-differences analysis taking enhancement event attendance frequency into account and, finally, develop several simple prediction models to identify characteristics associated with preferences for enhancement events. The authors find that enhancement events are primarily serving patrons who have strong allegiances to presenters, are frequent ticket buyers, and donate. Pre-performance attendance also correlates with a number of intrinsic outcome measures, though the effect appears to be greater for patrons who rarely attend enhancement events. Finally, age, appetite for new works, risk taking, personal creativity, allegiance to presenter, and seeking a connection to artists are all associated with preferences for enhancement events. These results point to an opportunity to deepen performance audiences by broadening and diversifying enhancement event audiences, which could in turn affect future participation decisions.

10. How Beliefs Matter: Views, Motives and their Relation to Buyer and Donor Behavior

Ximena Varela

The connection between beliefs, values and the *production* of art has long been acknowledged. Whether it is the artist's intent to make a political or value statement, or whether art is used as a vehicle for political messages or channel for values, the arts convey ideas, emotions, and elicit thought, feeling, and even action. But what happens on the side of *consumption*? Can the public's value systems and political beliefs be linked to specific patterns of arts attendance or even support for the arts? Put another way; are audiences who self-identify as conservative more likely to attend a particular arts event over another? Do their motivations to provide support for the arts vary from those who are more liberal? Do liberals and conservatives expect different things in return for their support of the arts? What are the implications for arts presenters? The paper begins with an overview of the audiences surveyed for the study in terms of their political beliefs, and provides additional descriptive statistics for age and sex distributions. This is followed by an explanation of the methodology used for the analytical process. The paper then divides into two sections: the first discusses the relationship between political views and ticket buying, while the second focuses on political views and donor behavior. It concludes with a discussion of the implications of these findings for performing arts presenters.

**Preferences and Purchase Behavior:
Survey Evidence on the Relationship between Stated Interest in the Performing
Arts and Ticket Purchase History**

Paper #3
Sarah L. Lee

ABSTRACT:

In this paper, I use the Major University Presenters' Value dataset to examine the relationship between individuals' stated preferences for performances across a variety of performance types and their actual history of purchasing tickets to performances of those same types. I find that there is a substantial proportion of the arts-going population who exhibit strong preferences for various types of performances, but whose ticket purchase behavior alone would not reveal those preferences ("high-demand non-purchasers"). I then develop a profile of high-demand non-purchasers in each performance type, focusing on the differences between high-demand non-purchasers and purchasers in demographic and background characteristics, cultural attitudes, and motivations. This paper proceeds as follows: in Section I, I briefly survey the literature on participation, audience-building, and marketing in the arts; in Section II, I discuss the data that will be used for this analysis; in Section III, I present simple statistical evidence on the relationship between stated preferences and ticket purchase history; in Section IV, I profile high-demand non-purchasers, and use these profiles to draw conclusions about potential barriers to attendance among high-demand non-purchasers; Section V concludes.

Section I. Audience-Building, Marketing, and the Arts

Over the last few decades, concern for declining participation in the arts has been a common refrain among both scholars and practitioners in the arts and culture realm, and studies of cultural participations rates have flourished. Although there is a lively debate over how best to define and measure participation and over which forms of participation best indicate the overall health of America’s cultural life¹, the data show convincingly that “institutional engagement” – including attendance at institutional arts and culture events – has declined (Tepper and Gao 2007). For arts presenters, this trend places audience-building – both in terms of increasing the frequency of ticket purchase among a core set of patrons and cultivating new audience segments – front and center among their objectives. A particular challenge for arts presenters is cultivating audience segments whose rates of attendance are decreasing even faster than the overall population, or who are under-represented in the arts-going population to begin with (e.g. young people, minorities).²

Marketing is one important tool that arts presenters have at their disposal to handle these challenges. But, to be effective, marketing requires both an understanding of the correlates of attendance, so as to craft messages that will appeal to potential attendees, and an ability to target likely attendees so that those messages can be communicated to their intended recipients. Data plays an ever-expanding role in both of these objectives. At one end of the spectrum are box-office-based audience databases, which can be used to build a marketing relationship with current attendees, target infrequent attendees with marketing messages designed to increase their level of engagement with an organizations, and begin to

¹ In particular, Tepper and Gao (2007) argue that people are *doing* more art despite attending it less frequently, and that standard participation studies may not place enough weight on this form of participation.

² McCarthy and Jinnett (2001) refer to these three strategic goals as “deepening” the audience, “broadening” the audience, and “diversifying” the audience, respectively.

profile current audience segments so as to target high-potential new audiences (Tomlinson and Roberts 2006). (Even relatively simple-seeming data, such as attendee addresses, can be used to develop fairly sophisticated geographic audience profiles.) Despite their potential for these broader uses, the primary function of box office-based audience databases is to target past arts attendees with messages about future performances of the same type. That is, an individual who has purchased a ticket to a jazz concert in the past is assumed to have a high potential for attending jazz concerts in the future, and will be targeted with marketing messages about future jazz concerts.

In recent years, the arts and culture sector has begun taking a cue from the broader marketing industry and begun calling for richer datasets on attitudes, motivations, and values of the arts-attending population to develop more precise marketing strategies. At the industry-wide level, this is the trend known as nano-casting, and has been positioned as a response to the trends of increasing marketing saturation and increasing consumer resistance to marketing. Against that backdrop, it is necessary for marketers to ensure that the right messages are going to the right people, and to conduct that matching with a finer-grain of detail than allowed by demographic data alone. This suggests the need to maintain and mine databases of more detailed information about the motivations and values that drive consumers and potential consumers (Smith et al. 2005). Studies in this vein collect data on individuals with both high and low rates of arts participation, and develop detailed segment profiles that deeply explore the factors that motivate arts attendance, the needs that consumers seek to fill by attending the arts, and the factors that inhibit arts attendance among low-frequency or non-attendees (see American Symphony Orchestra League 2001; Brown 2007; McCarthy and Jinnett 2001; Mitchell 1984; Ostrower 2001).

While these studies have done much to expand our understanding of a broad range of correlates of arts attendance, and have helped marketers to craft more precise messages, there is still a considerable amount that remains unknown about the decision-making process of potential arts attendees. In particular, two decisions are often collapsed in this literature: (1) the decision to include the arts in one's choice set of possible entertainment or leisure activities; and (2) the decision to actually attend an arts performance (McCarthy and Jinnett 2001). Disentangling these two decisions is important to the arts marketer because it determines whether messaging should be designed to create interest in the arts where it otherwise doesn't exist or whether the goal of messaging is to encourage the already interested to attend or attend more frequently. The dataset used in this study is valuable in that it allows us to look at a group of people who have crossed one threshold – they express interest in a particular type of performance – but may not have crossed the second threshold – they are not attending performances of that performance type. The primary goal of this paper is to assess how big this group of people is and whether there truly are an untapped market of individuals who are interested in, but not attending, arts performances. Subsequent to that, this paper attempts to profile this group, to understand how their attitudes, motives, and behaviors differ from current arts attenders.

Section II. Data and Methodology

The data used in this paper were collected as part of a collaborative research project called *The Values and Impact Study*, commissioned by a consortium of 14 major university arts presenters (MUPs), and carried out by consultants from the research and evaluation firm

WolfBrown. The dataset used here is the ticket-buyer component of the Values Study dataset.³

The sampling frame for the ticket-buyer survey was individuals, with email addresses, who had purchased tickets to at least one MUP performance for each of the 14 MUP sites. The survey was fielded, via the online survey service Zoomerang, in October 2006. The survey instrument included questions on cultural attitudes, cultural preferences and tastes, core values and beliefs, consumer behaviors, and demographic and lifestyle characteristics. 51,451 people were invited to take this survey; 7,645 completed the survey, for an overall response rate of 15%.⁴ This data was then appended with data on actual ticket purchase behavior provided by the relevant MUP. I drop 17 observations who indicated that they have not purchased tickets to a live MUP performance in the past two years, leaving me with a total sample of 7,628.⁵

For this paper, the key variables of interest are respondents' stated interest in a variety of performance types and their actual ticket-purchase behavior in a variety of performance types. The survey question on interest was stated as:

“What is your level of interest in attending the following types of (dance/ music/ theater) performances?”

Responses are measured on a 1-7 scale, where 1 indicates “Low Interest” and 7 indicates “High Interest”. This question was asked for each of 24 types of performance. Actual ticket purchase behavior is recorded as a binary variable, which is equal to 1 if the respondent

³ *The Values and Impact Study* also consists of a donor component and a national sample component, as well as the Impact Study dataset.

⁴ Response rates vary across site, from a low of 8% at the Mondavi Center for the Performing Arts to a high of 28% at the Krannert Center for the Performing Arts. See “A Segmentation Model for Performing Arts Ticket Buyers” (Brown 2007) for additional response rate detail.

⁵ This question was a survey eligibility screener. Respondents who answered in the negative were not intended to complete the survey.

purchased a ticket to a performance of the relevant performance type and 0 otherwise.

Ticket purchase behavior is provided for 18 types of performance.⁶

Because actual ticket purchase behavior is not provided for each of the performance types asked about in the survey (and vice versa), I focus on a smaller set of performance types throughout this analysis. Although the focus is on a smaller set of performance types, my overall sample size does not shrink as a result; complete interest level and purchase behavior is available for all 7,628 observations across all 13 performance types.⁷ Table 1 details this set of performance types and indicates the particular interest variable(s) and ticket purchase behavior variable used to analyze each type.

Table 1. Performance Types Analyzed		
Performance Type	Interest Variable Input	Purchase Variable Input
<i>DANCE</i>		
Ballet	Ballet	Ballet
Modern	Modern/contemporary dance	Modern Dance
Jazz or Tap	Jazz or tap dance	Other Dance (e.g. jazz, tap, hip hop, but not ethnic)
	Mean interest level in:	
World Music and Dance	Ethnic or folk dance of diverse cultures	World music and dance
	World music concerts	
<i>MUSIC</i>		
Symphonic	Classical music concerts (symphonic or prominent recitalists)	Symphonic music
Chamber	Chamber music concerts (intimate scale)	Chamber music
Opera	Opera (fully staged productions)	Opera, vocal recitals, vocal ensembles
	Mean interest level in:	
	Jazz concerts - New Orleans jazz or Dixieland	
Jazz	Jazz concerts - Swing or big band music	Jazz or blues
	Jazz concerts - Bebop	
	Jazz concerts - Latin jazz (Afro-Cuban or Brazilian jazz)	
	Jazz concerts - Jazz fusion or avant-garde jazz	
<i>THEATER</i>		
Broadway	Broadway musicals	Broadway shows
	Mean interest level in:	
Stage Plays	Stage plays - contemporary drama	Stage plays
	Stage plays - Shakespeare	
Multi-Media Theatrical	Multi-media theatrical programs or performance art	Multi-media, multi-discipline, or performance art
Comedy	Performances by comedians or comedy troupes	Comedy artists and attractions
Lectures	Lectures on current topics by distinguished speakers	Lectures or speakers

⁶ An exhaustive list of the types of performances asked about in the survey and the types of performance for which ticket purchase behavior is appended is included in Appendix A.

⁷ Not all of the 7,628 individuals in the sample have purchased tickets to one of the 13 performance types of interest. However, as they have purchased tickets to at least one of the 18 performance types offered across all MUPs, they remain part of the ticket-purchasing population.

As indicated, survey questions about interest in world music and dance, jazz concerts, and stage plays are sub-divided into more detailed categories; however, actual ticket purchase behavior is available only at the higher level of aggregation. To address this fact, I compute interest in world music and dance, jazz concerts, and stage plays as the mean of the respondent's stated interest across all of the sub-categories.

Section III. The Relationship between Stated Preferences & Ticket Purchase Behavior

To begin to provide a sense of the relationship between respondents' stated preferences for performances of various types and their actual propensity to purchase tickets to those same types of performances, I present a very basic quantitative summary in Table 2. Column 1, which shows the proportion of the total sample that purchased tickets to performances of each type, is provided simply to contextualize the scale of the market for each performance type. World Music and Dance, perhaps in part because it consists of both world music concerts *and* ethnic and folk dance performances, has the largest market with 28% of the overall sample purchasing tickets to performances in this category; Comedy performances and Lectures have the smallest markets with only 3.4% of the overall sample attending performances in either type.

Table 2. Unadjusted Interest Level/Purchase Behavior Relationship

Performance Type	(1)	(2)	(3)	
	% Purchasers	Interest/Purchase Correlation	Purchasers	Non-Purchasers
<i>DANCE</i>				
Ballet	9.7%	0.20	5.8	4.5
Modern	17.3%	0.27	5.8	4.5
Jazz or Tap	6.8%	0.09	4.9	4.3
World Music and Dance	28.2%	0.24	5.2	4.4
<i>MUSIC</i>				
Symphonic	14.3%	0.30	6.3	4.7
Chamber	12.4%	0.27	5.8	4.2
Opera	17.7%	0.20	5.0	3.9
Jazz	17.8%	0.22	4.8	3.9
<i>THEATER</i>				
Broadway	18.9%	0.24	6.4	5.4
Stage Plays	10.6%	0.14	5.7	5.1
Multi-Media Theatrical	9.0%	0.08	5.2	4.7
Comedy	3.4%	0.07	5.5	4.9
Lectures	3.4%	0.13	5.6	4.3

Columns 2 and 3, however, begin to assess the efficacy of ticket purchase behavior as a proxy for individuals' underlying preference characteristics. In Column 2, I show the correlation coefficient between interest and ticket purchase behavior for each performance type, while Column 3 shows the mean level of interest for purchasers and non-purchasers for each performance type. As would be expected, all correlation coefficients are positive and significantly different from zero with 99% confidence, and the mean interest level is always significantly higher (again, with 99% confidence) for purchasers than it is for non-purchasers. Together, these two facts confirm that the decision to purchase tickets is, at least in part, a reflection of respondents' underlying preferences.

However, in all cases, correlation coefficients are substantially less than one, and the interest level difference between purchasers and non-purchasers is never greater than 1.6 on a 7-point scale. In other words, while ticket purchase behavior is influenced by underlying preferences, preferences do not seem to be completely determining individuals' decisions to purchase tickets. It is also clear that the extent to which preferences and purchase behavior are related varies by performance type: this relationship appears to be strongest for

symphonic concerts, where the correlation coefficient is 0.30 and the mean interest level among purchasers is 1.6 points higher than the mean interest level among non-purchasers. For both multi-media theatrical performances and comedy performances, the relationship is quite weak, suggesting that the decision of whether or not to purchase tickets to these types of performances is influenced by many factors aside from preferences.

Adjusting for Opportunity to Purchase

The picture presented in Table 2 is not the full story. Few of the MUP sites offer performances in all of the performance types; as a result, the non-purchaser category (as presented in Table 2) includes both individuals who had the opportunity to purchase tickets for a specific performance type and chose not to *and* individuals who did not have the opportunity to purchase tickets at the MUP site. The goal here is to understand how preferences and the ticket purchase *decision* are related; therefore, I adjust these numbers to focus only on those non-purchasers who had the opportunity to purchase tickets in Table 3⁸.

⁸ To make this adjustment, I identify, for each performance type, those sites where no respondents are coded as having purchased tickets and set the adjusted purchase variable to “missing” for all respondents at that site. In other words, as long as at least one respondent purchased a ticket to a particular performance type, I assume that all respondents from that site had the opportunity to purchase tickets to that performance type.

Table 3. Adjusted Interest Level/Purchase Behavior Relationship

Performance Type	(1)	(2)	(3)		(4)		(5)		
	# of Sites	n=	% Purchasers		Interest/Purchase Correlation		Purchasers	Mean Interest Level	
			Adjusted	Unadjusted	Adjusted	Unadjusted	Purchasers	Non-Purchasers Adjusted	Non-Purchasers Unadjusted
<i>DANCE</i>									
Ballet	8	4149	17.9%	9.7%	0.28	0.20	5.8	4.4	4.5
Modern	13	7077	18.7%	17.3%	0.28	0.27	5.8	4.5	4.5
Jazz or Tap	7	4513	11.4%	6.8%	0.12	0.09	4.9	4.2	4.3
World Music and Dance	13	7077	30.4%	28.2%	0.25	0.24	5.2	4.4	4.4
<i>MUSIC</i>									
Symphonic	10	5786	18.8%	14.3%	0.35	0.30	6.3	4.7	4.7
Chamber	11	6163	15.3%	12.4%	0.28	0.27	5.8	4.3	4.2
Opera	11	6163	21.9%	17.7%	0.20	0.20	5.0	4.0	3.9
Jazz	12	6413	21.2%	17.8%	0.24	0.22	4.8	3.9	3.9
<i>THEATER</i>									
Broadway	5	2670	54.1%	18.9%	0.31	0.24	6.4	5.6	5.4
Stage Plays	12	6413	12.6%	10.6%	0.14	0.14	5.7	5.2	5.1
Multi-Media Theatrical	11	6317	10.8%	9.0%	0.09	0.08	5.2	4.7	4.7
Comedy	4	2480	10.4%	3.4%	0.10	0.07	5.5	5.0	4.9
Lectures	5	2390	10.7%	3.4%	0.19	0.13	5.6	4.5	4.3

Columns 1-3 are again included to contextualize both the scale of the market for each performance type, as well as to provide a rough sense of the difference that the adjustment makes. Column 1 provides the number of MUP sites which have at least one respondent recorded as purchasing a ticket for a performance of that type; we see that Broadway shows, comedy performances, and lectures are available for purchase at relatively few sites while modern dance and world dance and music are available at virtually all sites.⁹ This, along with the number of remaining observations post-adjustment (Column 2) provide a rough sense of the magnitude of the effect expected from adjustment for each performance type; I expect that making the adjustment will have a bigger effect on results for Broadway shows than for world dance and music.

Column 3 shows the proportion of the remaining sample that purchased tickets in each performance type. Broadway shows now jumps to being the most frequently purchased performance type *when respondents have the opportunity to purchase*. That is, over half of those respondents from a site which offers Broadway shows purchased tickets to a Broadway show; most of the non-purchasers in the unadjusted number did not have the opportunity to purchase tickets to a Broadway show.

Columns 4 and 5 make a stronger case for the argument that purchase behavior is only partially proxies for underlying demand; although the correlation between purchasing tickets and interest is everywhere stronger than when looking at the unadjusted data, there remains substantial room for factors other than interest to explain why a respondent did or did not purchase tickets. Moreover, the adjusted mean interest level of non-purchasers is often *higher* than the unadjusted mean interest level of non-purchasers, indicating that

⁹ The remaining site is the Lied Center for the Performing Arts at the University of Nebraska which appears to have no purchasers in any category of performance.

relatively high interest persists among non-purchasers even when accounting for the fact that these respondents had the opportunity to purchase tickets.

Taken together, Tables 2 and 3 provide strong evidence that, although purchase behavior is related to a respondent's underlying preferences for particular types of performance, it is far from a perfect proxy for those preferences. Moderately low correlation coefficients suggest that there is substantial variation in the purchase decision that is left unexplained by self-reported interest levels. Moreover, adjusting for whether respondents actually had the opportunity to purchase tickets does not substantially change our interpretation of the strength of the relationship between purchase behavior and preferences. It is important to note, however, that although I adjust for the opportunity to purchase tickets in a particular category of performance *at the MUP site*, I cannot adjust for other opportunities that respondents may have had to purchase tickets elsewhere.

High-Demand Non-Purchasers

I turn now to examining the distribution of respondents across dimensions of both underlying demand and the actuation of that demand. For each performance type, I categorize respondents as either “high-demand” or “low-demand;” respondents who rate their interest level as 6 or 7 are considered to be high demanders for that performance type, while other are considered to be low demanders.¹⁰ Table 4 shows the distribution of high- and low-demanders for each performance type across 3 purchase categories: (1) purchasers; (2) non-purchasers who had the opportunity to purchase; (3) non-purchasers who did not have the opportunity to purchase.

¹⁰ This is also the cut-off used to address this question in Brown (2007). I also try alternative cut-offs; in each case, the size of the high-demand non-purchaser sample grows relative to the size of the purchaser sample as the threshold for being considered “high-demand” is reduced. Therefore, this cut-off provides a conservative estimate of the size of the high-demand non-purchaser market.

Table 4. Distribution Across Interest Level & Purchase Behavior

Performance Type	(1)		(2)		(3)	
	Non-Purchasers		Purchasers		No Opportunity to Purchase	
	High Demand	Low Demand	High Demand	Low Demand	High Demand	Low Demand
<i>DANCE</i>						
Ballet	14.4%	30.3%	6.5%	3.2%	16.7%	28.9%
Modern	25.6%	49.8%	11.8%	5.5%	2.4%	4.8%
Jazz or Tap	15.3%	37.1%	3.1%	3.7%	13.1%	27.7%
World Music and Dance	20.2%	44.4%	15.4%	12.9%	2.5%	4.8%
<i>MUSIC</i>						
Symphonic	23.3%	38.2%	11.7%	2.6%	10.8%	13.3%
Chamber	21.5%	46.9%	8.4%	4.0%	4.3%	14.9%
Opera	17.7%	45.5%	8.7%	9.0%	4.3%	15.0%
Jazz	14.5%	51.8%	8.0%	9.9%	3.9%	12.1%
<i>THEATER</i>						
Broadway	10.1%	6.0%	16.3%	2.6%	38.0%	27.0%
Stage Plays	38.4%	35.1%	7.4%	3.2%	6.9%	9.0%
Multi-Media Theatrical	26.7%	47.2%	4.2%	4.8%	6.8%	10.4%
Comedy	13.3%	15.9%	2.0%	1.4%	28.0%	39.5%
Lectures	9.5%	18.5%	2.2%	1.2%	19.7%	49.0%

There are a number of interesting findings in this table. For instance, it is instantly apparent that purchase behavior inadequately proxies for preferences not only because there are a large number of non-purchasers with high demand, but also because there are a substantial number of purchasers with low demand. In fact, for four types of performance (jazz or tap dance, opera, jazz concerts, and multi-media theatrical performances), the number of low-demand purchasers exceeds the number of high-demand purchasers. From a marketing perspective, these low-demanders should be considered low potential targets; yet, the fact that they have purchased tickets in the past would make them highly likely to receive targeted messages when using a box-office transactions data approach.

The other side of this coin is that high potential targets – in the form of high-demand non-purchasers – would be excluded from a box-office transactions data targeted marketing approach. Yet, high-demand non-purchasers are almost universally a bigger segment of the market than purchasers and are universally a bigger segment than high-demand (and therefore, high-potential return customers) purchasers.

This is made transparent in Table 5a, which presents “Latent Demand Ratios” for each performance type. Latent Demand Ratios are computed as the number of high-

demand non-purchasers over the total number of purchasers, and reflect the size of the latent demand market in relation to the actuated demand market. In other words, there are roughly one and a half times as many high-demand non-purchasers for ballet as there purchasers for ballet.

Table 5a. Latend Demand Ratios by Performance Type

<u>Performance Type</u>	<u>Latent Demand Ratio</u>
<i>DANCE</i>	
Ballet	1.5
Modern	1.5
Jazz or Tap	2.3
World Music and Dance	0.6
<i>MUSIC</i>	
Symphonic	1.6
Chamber	1.7
Opera	1.0
Jazz	0.8
<i>THEATER</i>	
Broadway	0.5
Stage Plays	3.6
Multi-Media Theatrical	3.0
Comedy	3.9
Lectures	2.8

This table also provides useful information about the between-performance type variation in the size of the high-demand non-purchaser market. Comedy performances and stage plays appear to be doing the worst in terms of converting latent interest in these performances into tickets sales; in both cases there are nearly 4 times as many high-demand non-purchasers as there are purchasers in the sample. Three types of performance – Broadway performances, World Music and Dance performances, and Jazz concerts – show great success at converting demand into sales. In all three cases, the number of high-demand non-purchasers is smaller than the number of purchasers, suggesting that a majority of likely attendees are actual ticket purchasers for performances in those genres.

These Latent Demand Ratios can also be used to assess latent demand dynamics across MUP sites. Table 5b presents the overall Latent Demand Ratio for each of the 13 MUP sites, while Appendix B provides Latent Demand Ratios for each MUP site by performance type combination.¹¹

Table 5b. Latent Demand Ratios by MUP Site

MUP Site	Latent Demand Ratio
University of Florida Performing Arts	2.0
Clarice Smith Performing Arts Center (Univ. of Maryland)	2.4
ASU Gammage (Arizona State Univ.)	1.5
Mondavi Center for the Performing Arts (Univ. of California - Davis)	2.0
University Musical Society (Univ. of Michigan)	1.1
Hancher Auditorium (Univ. of Iowa)	1.5
Krannert Center for the Performing Arts (Univ. of Illinois)	2.2
Lied Center of Kansas (Univ. of Kansas)	2.3
Penn State Center for the Performing Arts	1.1
Cal Performances (Univ. of California - Berkeley)	2.4
Stanford Lively Arts	0.9
Hopkins Center at Dartmouth	1.4
Annenberg Center for the Performing Arts (Univ. of Pennsylvania)	2.4

Again, these Latent Demand Ratios provide a rough assessment of how well the presenters at each MUP site are doing at converting latent interest into actuated demand. Stanford Lively Arts currently ranks as the most successful site on this dimension, with slightly more purchasers than high-demand non-purchasers. 7 sites have Latent Demand Ratios of 2.0 or greater, suggesting that there is substantial room to improve ticket sales by marketing to these high-demand non-purchasers.

The table provided in Appendix B digs deeper into site-specific dynamics, and shows how well each site is doing in each of the performance types of interest.¹² Reading across

¹¹ Again, Latent Demand Ratios are computed using only data from respondents with the opportunity to attend a specific performance type at the relevant MUP site. For this reason, Latent Demand Ratios are not computed when a performance type is not available at an MUP site.

the table provides information about the within-site variability in the size of the untapped high-demand non-purchaser market. For instance, the largest Latent Demand Ratios for University of Florida Performing Arts are found in Comedy performances, stage plays, and Modern dance performances. This indicates that marketing to high-demand non-purchasers may have the greatest impact on ticket sales in these three areas, while marketing to high-demand non-purchasers of World Music and Dance performances – where the Latent Demand Ratios is less than 1 – would have relatively less of an effect. Reading down the table provides information about within-performance type variability across sites; within Ballet, the Annenberg Center for the Performing Arts has the most to gain from marketing to high-demand non-purchasers while Penn State Center for the Performing Arts has the least.

Positivity Bias?

Thus far, I have presented considerable quantitative evidence of a substantial pool of individuals with strong preferences for particular types of performances who are, nevertheless, not purchasing tickets to these types of performances. This evidence relies heavily on the use of individuals' self-reported interest levels; as the literature on survey data makes clear, however, individuals' self-reported tastes and preferences are not always as reliable as data revealed through other methods (for example, contingent valuation methods). There is a lingering question, therefore, of whether these survey questions truly capture latent demand, or whether individuals' responses are vulnerable to threats of positivity or social desirability biases.

¹² Note that, in a handful of instances, only 1 survey respondent has ticket purchase behavior reported in a particular performance type at a particular MUP site. This gives rise to some very inflated Latent Demand Ratios; please exercise caution in interpreting Latent Demand Ratios above 100.

To get a rough sense of whether the individuals I have identified as high-demand non-purchasers are simply individuals with a tendency to inflate their survey responses in a positive or what may be perceived as a socially desirable direction, I compute each individual's mean interest level across all forms of performance asked about in the survey. I then compare, in each performance type, purchasers to high-demand non-purchasers. Results are reported in Column 1 of Table 6, and show that, in every performance type, high-demand non-purchasers report a higher degree of interest, on average, than purchasers. In all cases, the differences between high-demand non-purchasers and purchasers are statistically significant at the $p < .01$ level, however it is worth noting that even substantively small differences (e.g. the 0.1 difference in mean interest level between Comedy purchasers and Comedy high-demand non-purchasers) are estimated with great precision due to the relatively large sample sizes available.

Table 6. Check for Positivity Bias

Performance Type	(1)		(2)		(3)	
	Mean Interest Level		Mean Interest Level, for Types Purchased		Mean Interest Level, for Types not Purchased	
	Purchasers	High-Demand Non-Purchasers	Purchasers	High-Demand Non-Purchasers	Purchasers	High-Demand Non-Purchasers
<i>DANCE</i>						
Ballet	4.9	5.2	5.7	6.1	4.6	5.1
Modern	4.9	5.2	5.7	6.0	4.7	5.1
Jazz or Tap	4.7	5.3	5.4	6.0	4.5	5.2
World Music and Dance	4.8	5.2	5.4	6.0	4.6	5.2
<i>MUSIC</i>						
Symphonic	4.9	5.1	5.8	5.8	4.6	5.1
Chamber	4.8	5.1	5.6	5.8	4.6	5.0
Opera	4.8	5.2	5.3	6.0	4.6	5.1
Jazz	4.7	5.3	5.2	6.1	4.6	5.2
<i>THEATER</i>						
Broadway	4.6	4.9	6.0	5.5	4.3	4.8
Stage Plays	4.9	5.1	5.6	5.8	4.6	5.0
Multi-Media Theatrical	4.9	5.1	5.4	5.9	4.6	5.0
Comedy	4.8	4.9	5.4	5.7	4.4	4.8
Lectures	4.9	5.1	5.6	5.7	4.7	5.0

Columns 2 and 3 break this relationship down further. In Column 2, I look at the mean interest level over only the types of performance for which an individual has purchased tickets; in Column 3, I look at the mean interest level over only the types of performance for which an individual has *not* purchased tickets. All differences are, again,

significant at the $p < .01$ level, except for the differences in Column 2 for Symphonic performances and Lectures.¹³ In all cases save one – purchasers to Broadway performances report higher interest in the performances that they have attended than high-demand non-purchasers to Broadway performance – high-demand non-purchasers report higher levels of interest in both the performances that they do attend and the performances that they do not attend than purchasers.

These results suggest that we should use caution in interpreting these results as a clear sign of a large group of individuals with very strong preferences for performances that they are not attending. To some degree, the size of this group and the extent of their demand may be inflated due to positivity or social desirability bias used when responding to these survey questions. Nevertheless, it remains true that there is a sizeable segment of the sample that is not purchasing tickets to particular performances, but would label their own interest in attending those performances as very high.

Section IV. Who are High-Demand Non-Purchasers?

The evidence in the previous section indicates that purchase behavior only partially reflects underlying demand characteristics, and shows that individuals who express interest in a performance type but have no past history of attendance may be a sizeable marketing opportunity. This conclusion is qualified by evidence that suggests that respondents identified as high-demand non-purchasers may be inclined toward positive responses. Nevertheless, in this section, I look to the data to begin to understand who these high-demand non-purchasers are and how they are different from those who purchase tickets to determine whether this information might be useful in developing more precise marketing

¹³ Neither difference is significant at the looser $p < .10$ standard.

strategies that will help arts presenters cultivate this high-potential audience segment. I start with a very basic question: are high-demand non-purchasers the same people across different types of performance? From there, I develop profiles of the high-demand non-purchasers in each types of performance using survey data on demographics, cultural consumption behaviors, cultural attitudes, values and motivations, and recreational behaviors.

Are High-Demand Non-Purchasers the Same Across Performance Type?

The evidence presented in the previous section on the potential for positivity/social desirability bias in survey responses to be, at least partially, responsible for generating a large group of high-demand non-purchasers in this sample. Before I look to the data to better understand who these high-demand non-purchasers, I explore whether the individuals characterized as high-demand non-purchasers for one type of performance are more likely to be characterized as high-demand non-purchasers for other types of performance, and whether they are simply less frequent arts attendees overall. In other words, my goal is to determine whether it would be more appropriate to characterize high-demand non-purchasers as by their high levels of stated interest in many performance types, but low likelihood of actually purchasing tickets to any of those performance types.

Table 7 presents correlation coefficients between dummy variables indicating that an individual is a high-demand non-purchaser for a particular performance type.¹⁴ With three exceptions, all correlation coefficients are significantly different from zero at $p < .05$. All exceptions occur between high-demand non-purchasers for Broadway performances and some other type of performance (Modern dance, World music and dance, and Multi-Media

¹⁴ For each of these dummy variables, “0” indicates purchaser. Individuals with no opportunity to purchase a ticket for a particular performance are coded as missing in this series of dummy variables.

theatrical performances). While being a high-demand non-purchaser for Broadway performances is highly correlated with being a high-demand non-purchaser for jazz concerts ($\rho=0.44$), other correlation coefficients are relatively low and/or non-significant for Broadway performances suggests that these high-demand non-purchasers may represent a unique segment.

Aside from Broadway performances, however, all other correlation coefficients are significant, positive, and of moderate to moderately large magnitude. This suggests that high-demand non-purchasers of one performance type are more likely to be high-demand non-purchasers of other performance types. Table 8 provides further information to help interpret these results; in it, I report the overall number of tickets purchased (across all types of performance) for purchasers and high-demand non-purchasers in each performance type. Purchasers of each performance type are more frequent arts attendees (in general) than high-demand non-purchasers of the same type; again, this is the same across all types and all differences are significant at $p<.01$. In most cases, these differences are substantial, indicating that purchasers attend 2.4 to 5 more performances than high-demand non-purchasers.¹⁵ This suggests that the high-demand non-purchasers identified in this study can be thought of as being quite similar to the low-frequency attendees profiled in prior studies (e.g. ASOL 2001).

¹⁵ Note that the difference is smallest for Broadway performances, and also that purchasers of Broadway performances attend the lowest number of total performances of all of the purchaser groups.

Table 7. High-Demand Non-Purchasers Correlations across Performance Types

	<i>DANCE</i>				<i>MUSIC</i>				<i>THEATER</i>				
	Ballet	Modern	Jazz or Tap	World Music and Dance	Sym- phonic	Chamber	Opera	Jazz	Broadway	Stage Plays	Multi- Media Theatrical	Comedy	Lectures
<i>DANCE</i>													
Ballet	1.00												
Modern	0.23	1.00											
Jazz or Tap	0.14	0.37	1.00										
World Music and Dance	0.29	0.34	0.22	1.00									
<i>MUSIC</i>													
Symphonic	0.26	0.20	0.10	0.25	1.00								
Chamber	0.23	0.30	0.32	0.27	0.40	1.00							
Opera	0.19	0.20	0.20	0.31	0.34	0.36	1.00						
Jazz	0.26	0.31	0.18	0.35	0.28	0.41	0.45	1.00					
<i>THEATER</i>													
Broadway	-0.07	0.00	0.44	0.06	0.05	0.11	0.18	0.10	1.00				
Stage Plays	0.19	0.17	0.14	0.20	0.23	0.27	0.24	0.26	0.15	1.00			
Multi-Media Theatrical	0.24	0.32	0.23	0.28	0.38	0.36	0.30	0.32	-0.05	0.38	1.00		
Comedy	0.39	0.35	0.32	0.24	0.29	0.35	0.23	0.34	0.19	0.41	0.51	1.00	
Lectures	0.15	0.09	0.33	0.09	0.18	0.15	0.14	0.15	0.21	0.20	0.35	0.49	1.00

Table 8. Overall Ticket Purchase Behavior

Performance Type	Mean # of Tickets Purchased	
	Purchasers	High-Demand Non-Purchasers
<i>DANCE</i>		
Ballet	4.5	2.0
Modern	4.8	2.1
Jazz or Tap	5.1	2.4
World Music and Dance	4.4	1.8
<i>MUSIC</i>		
Symphonic	4.6	2.1
Chamber	5.3	2.2
Opera	4.6	2.1
Jazz	4.9	2.0
<i>THEATER</i>		
Broadway	2.7	1.9
Stage Plays	5.2	2.3
Multi-Media Theatrical	6.0	2.1
Comedy	7.4	2.4
Lectures	4.9	2.5

High-Demand Non-Purchaser Profiles

Appendix A presents full profiles for each performance type. These profiles are developed by conducting mean comparison tests on groups of variables found in the Value Study dataset used throughout this paper, comparing high-demand non-purchasers (adjusted to account for whether or not the respondent had the opportunity to purchase tickets to a particular performance type at their MUP site) to purchasers. I report all differences that are statistically significant at $p < 0.05$. A “+” indicates that high-demand non-purchasers are *more* likely than purchasers to fall into the relevant category or give a higher response to the relevant question. A “-“ indicates that high-demand non-purchasers are *less* likely than purchasers to fall into the relevant category or give a higher response to the relevant question. In this section, I summarize the key findings from these profiles, focusing primarily on profile characteristics that are common to many or most performance types.

Demographic and Background Characteristics

Overall, the demographic portrait that emerges from these profiles is that, across nearly all performance types, high-demand non-purchasers tend to be younger, more likely to have children in their household, and less likely to be retired than those who purchased tickets in the relevant genre. There are exceptions to this; for instance, while high-demand non-purchasers of jazz or tap dance performances and Broadway performances are younger than purchasers, they are no more likely to have children nor less likely to be retired. High-demand non-purchasers of lectures are neither younger nor more likely to have children nor less likely to be retired. Nevertheless, it is a fairly consistent finding across type of performance that high-demand non-purchasers are in a different stage-of-life than are purchasers. This suggests a synchronicity between tapping into the high-demand non-purchaser market and meeting a long-held “diversifying” objective in many cultural organizations – becoming more attractive to younger audiences. It also begins to point to some of the practical barriers that make it difficult for this group to actuate their demand; families and jobs place more constraints on their time than may be felt by those who are currently attending these performances. In all types of Dance and Music performances, high-demand non-purchasers are also more likely to be female than are purchasers. This is never the case for any form of Theater performance, however.

High-demand non-purchasers to Ballet, Symphonic music performances, Chamber music performances, Multi-Media theatrical presentations, and Lectures report that their allegiances/bonds to both the MUP university and the presenter itself are weaker than those reported by purchasers. This may indicate that the MUP is not the primary source of arts and cultural presentations for these individuals; if this is the case, then the purchase behavior available for these individuals may only partially reflect their true arts consumption patterns.

Cultural Consumption Behaviors

When they attend performances, high-demand non-purchasers are more likely to attend with their children, their parents or grandparents, and, to a lesser extent, friends. For a few performance types, high-demand non-purchasers are less likely than purchasers to attend alone. Consistent with this, high-demand non-purchasers of several performance types are also more likely to view arts attendance as a social occasion. On the one hand, this poses a barrier to attendance for some high-demand non-purchasers; in many performance types, they are more likely to say that not having someone to attend with is a factor that would prevent them from attending. However, in most performance types, high-demand non-purchasers also consider themselves initiators of cultural events within their social context. Marketing messages that draw on this fact – for instance, by reminding marketing targets that a particular cultural performance could be a fun social occasion for them to organize – may be successful at persuading this audience to purchase tickets.

Cost constraints and their desire not to commit to attending far in advance are also important practical barriers to arts attendance among high-demand non-purchasers. In this regard, salient inhibitors for high-demand non-purchasers are similar to the salient inhibitors of frequent cultural attendance identified in previous studies (ASOL 2001). This provides further reason to believe that high-demand non-purchasers are all-around less frequent arts attendees.

Finally, high-demand non-purchasers indicate that they are very receptive to most sources of information about cultural events. Postcards, email, and websites are particularly well-regarded as sources of information.

Cultural Attitudes

The cultural attitudes and preferences professed by high-demand non-purchasers indicate that there is little specific content that turns them off from attending particular types of

performance, and also suggests that positivity/social desirability biases are also at play in their responses to these questions.

High-demand non-purchasers for many types of performance have higher stated levels of interest in a range of different cultures – from hip hop culture to Native American culture. Their tastes also tend to the relatively cutting edge – many prefer multi-sensory experiences over single sensory experiences and riskier choices over safe content choices. (All of these tastes and preferences are also associated with being younger.)

General questions about cultural attitudes also suggest that a measure of positivity bias is exerting some influence on these responses; there are far more “+” signs than “-“ signs even when particular attitudes seem to be at odds with each other. (For instance, high-demand non-purchasers in several performance types value both art that can be remixed and adapted, as well as historically accurate.) That said, the attitudes that seem to be most commonly held among high-demand non-purchasers are an interest in the artistic legacy of their own ancestors¹⁶ and a desire for arts and cultural performances that expose them to many cultures.

Values and Motivations

High-demand non-purchasers across virtually all performance types state that they place higher priority on a range of internally-focused and externally-focused than purchasers so frequently that the results are difficult to interpret. Again, positivity bias appears to play a big role in generating these differences. Of interest, however, is the fact that few high-demand non-purchasers express a high degree of interest (relative to purchasers) on voicing their political views. While these results do not provide much to guide marketing messaging designed to influence high-demand non-

¹⁶ Ethnicity was not asked in the survey, but this attitude may indicate that high-demand non-purchasers are more likely to be from minority ethnic groups.

purchasers, they do show that political messaging would be compelling to few high-demand non-purchasers.

Recreational Behaviors

Finally, a range of questions on interest and membership in various recreational activities show high-demand non-purchasers to be quite active, albeit not in a particularly community- or civically-oriented sense. They are more likely to be interested in a range of activities – from going out dancing socially to singing to downloading music from the Internet. However, they are not as highly oriented toward belonging to formal organizations; in particular, they are never more likely than purchasers to belong to a community gardening or nature group, a community service group, or a political organization or campaign.

Section V. Conclusion and Directions for Future Research

In this paper, I attempt to understand the relationship between individual's stated interest in various performance types and their actual ticket purchase behavior for those same performance types, with an eye toward identifying the existence of and quantifying the size of a high-potential audience segment for arts presenters: individuals with strong preferences for arts performances who are not attending those performances. The hope is that, because these individuals already acknowledge the desirability of attending particular performances, arts marketers can have great success in converting them to ticket buyers with messages appropriately tailored to their particular motivations and values.

Using a very valuable new dataset from a consortium of Major University Presenters, I find that interest in arts performances is imperfectly correlated with attendance to arts performances, indicating that such high-demand non-purchasers do exist, and find that, for some performances, the size of this market far exceeds the size of the currently-attending audience. However, these

findings are qualified by strong evidence which suggests that responses to interest levels may be biased in an upward direction. This qualification suggests that there is considerable room for further research on latent demand in the arts, and that it would be extremely valuable to invest in studies that use research methodologies that are more reliable in cases where respondent's answers may be inflated due to positivity or social desirability biases.

I also find that high-demand non-purchasers for one performance type are likely to be high-demand non-purchasers for other performance types, and that high-demand non-purchasers buy attend arts performances less frequently overall than purchasers of a particular performance type. In this, high-demand non-purchasers seem to be very similar to the low-frequency attenders profiled in other studies. Profiles of high-demand non-purchasers, when informative, seem to agree with this conclusion. High-demand non-purchasers are younger than purchasers, and cost, social context, and time commitments are all barriers which may prevent or inhibit their attendance at arts performances of variety of genres.

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Appendix A

Survey questions on interest level

What is your level of interest in attending concerts featuring the following types of music?

- Classical music concerts (symphonic or prominent recitalists)
- Chamber music concerts (intimate scale)
- Opera (fully staged productions)
- Jazz concerts – New Orleans jazz or Dixieland
- Jazz concerts – Swing or big band music
- Jazz concerts – Bebop
- Jazz concerts – Latin jazz (Afro-Cuban or Brazilian jazz)
- Jazz concerts – Jazz fusion or avant-garde jazz
- World music concerts (i.e., concerts that feature the music of diverse cultures)
- Bluegrass or Appalachian folk music concerts
- Gospel music concerts
- Hip Hop or Rap concerts

What is your level of interest in attending the following types of dance performances?

- Ballet
- Modern/contemporary dance
- Ethnic or folk dance of diverse cultures
- Jazz or tap dance
- Acrobatic or circus

What is your level of interest in attending the following types of theater performances?

- Stage plays – contemporary drama
- Stage plays – Shakespeare
- Broadway musicals
- Performances by comedians or comedy troupes
- Multi-media theatrical programs or performance art
- Lectures on current topics by distinguished speakers
- Spoken word events featuring literature, poetry, etc.

Appended data on ticket purchase behavior

Bought tickets to...

- Ballet
- Modern dance
- Other dance (e.g., jazz, tap, hip hop, but not ethnic)
- World music and dance
- Symphonic music

- Chamber music
- Opera, vocal recitals, vocal ensembles
- Contemporary music
- Jazz or blues
- Broadway shows
- Stage plays
- Multi-media, multi-discipline, or performance art
- Comedy artists and attractions
- Lectures or speakers
- Family/children's programs
- Urban artists
- African or African-American
- Student ensembles (any discipline)

Appendix B. Latent Demand Ratios by MUP Site and Performance Type

MUP Site	DANCE				MUSIC				THEATER				
	Ballet	Modern	Jazz or Tap	World Music and Dance	Sym- phonic	Chamber	Opera	Jazz	Broadway	Stage Plays	Multi-Media Theatrical	Comedy	Lectures
University of Florida Performing Arts	1.6	3.9	1.7	0.6	1.7	1.7	1.0	1.7	0.9	6.4	2.4	7.1	3.2
Clarice Smith Performing Arts Center (Univ. of Maryland)		1.9		1.5		2.2	1.7	1.2		5.0	5.8		
ASU Gammage (Arizona State Univ.)	2.9	213.0	0.9	41.3	56.3				0.2		321.0		
Mondavi Center for the Performing Arts (Univ. of California - Davis)		1.4		0.4	2.6	2.7	0.5	0.5		3.4	6.7	22.9	2.2
University Musical Society (Univ. of Michigan)		1.7	8.1	0.5	0.5	1.9	0.5	0.4		1.9	1.3		
Lied Center for the Performing Arts (Univ. of Nebraska)													
Hancher Auditorium (Univ. of Iowa)	0.8	1.3	1.8	0.5	2.2	3.2	2.0	0.7	0.6	7.9	1.7	2.3	
Krannert Center for the Performing Arts (Univ. of Illinois)	1.9	1.8	3.1	1.2	1.3	2.2	2.1	1.1		37.3	2.3		
Lied Center of Kansas (Univ. of Kansas)	2.5	1.9		0.6	4.2	1.2	0.8	1.9	1.1	6.5	19.5	7.0	
Penn State Center for the Performing Arts	0.7	1.4		0.8		2.0	1.6	0.9	0.5	3.8			
Cal Performances (Univ. of California - Berkeley)	1.2	0.5		0.5	27.0	5.1	3.1	1.9		13.0	9.5		2.3
Stanford Lively Arts		0.4		0.6		0.4	0.6	0.7		2.6			4.4
Hopkins Center at Dartmouth		1.8	4.7	0.5	2.1	1.0	1.4	0.5		1.3	1.1	1.5	3.0
Annenberg Center for the Performing Arts (Univ. of Pennsylvania)	5.4	0.7	2.8	0.6	24.8			1.2		1.6	26.0		

Appendix C. High-Demand Non-Purchasers Profiles

	DANCE				MUSIC				THEATER				
	Ballet	Modern	Jazz or Tap	World Music and Dance	Sym- phonic	Chamber	Opera	Jazz	Broadway	Stage Plays	Multi-Media Theatrical	Comedy	Lectures
DEMOGRAPHICS & BACKGROUND CHARACTERISTICS													
Female	+	+	+	+	+	+	+	+					
Age	-	-	-	-	-	-	-	-	-	-	-	-	-
Presence of Children	+	+		+	+	+	+	+			+	+	+
Parents Live in Same Household or Close By		+	-	+	+	+		+			+		
Working full-time	+		-		+	+				+	+		
Retired	-	-		-	-	-	-	-		-	-	-	
Consider self a visual artist		+	+	+	+		+	+	+	+			
Consider self a performing artist			+	+			+		+				
Strength of allegiance to University	-		+		-	-					-		-
Strength of allegiance to presenter	-	-			-	-					-	-	-
Area of study is arts-related field*					-	-			+		-		
CULTURAL CONSUMPTION BEHAVIORS													
<i>Typically attend performances with...</i>													
Spouse or partner				-				-					
Children		+		+	+	+	+	+	+		+	+	+
Parents or grandparents	+	+		+	+	+	+	+		+	+	+	+
Friends	+		+	+	+	+	+	+					
Alone		-	+		-						-		
Believes that going to live performance is a social occasion,		+		+	+				-	+	+	+	
Prefer to keep options open, stay flexible & make	+	+	+	+	+		+	+	+	+	+	+	+
Buys the best seats available, without regard to cost			-		+	-		-	-			-	
<i>Passes up performances because of ...</i>													
Cost concerns	+	+	+	+	+	+	+	+	+			+	+
Time constraints or schedule conflicts				+		+			+				
Can't find somebody to go with		+	+			+				+	+		
Inclination to subscribe	-	-	-	-	-	-	-	-	-	-	-	-	-
Likes to initiate cultural activities	+		+	+	+	+	+	+			+		
<i>Perceived usefulness of sources of information about cultural events</i>													
Brochures in the mail	+												
Postcards in the mail	+	+	+	+	+	+	+	+	+	+	+	+	+
Radio	+	+	+	+	+	+	+	+	+	+	+	+	
Campus/university newspaper		+	+	+	-	+	+	+	+	+			
Local/regional newspaper		+	+	+		+			+	+	+		
Email from cultural organizations	+	+	+	+	+	+	+	+	+		+	+	+
Cultural web sites	+	+	+	+	+	+	+	+	+	+	+	+	+

Appendix C. High-Demand Non-Purchasers Profiles

	DANCE				MUSIC				THEATER				
	Ballet	Modern	Jazz or Tap	World Music and Dance	Sym- phonic	Chamber	Opera	Jazz	Broadway	Stage Plays	Multi-Media Theatrical	Comedy	Lectures
CULTURAL ATTITUDES													
<i>Takes a special interest in...</i>													
The art and culture of a specific country or region			+		+	+	+	+	+		+		
Hip hop/contemporary urban culture	+			+	+	+	+						
African-American culture	+		+	+	+		+	+	+				
African cultures	+		+		+	+	+	+	+				
Latin cultures			+	+	+		+	+	+				
Asian cultures	+		+	+	+		+	+	+		+		
Arab/Middle Eastern cultures	+		+	+	+	+	+	+			+		
Native American cultures	+	+	+	+	+	+	+	+	+				
Indigenous or aboriginal cultures			+	+	+		+	+	+		+		
Gay or lesbian culture	+			+	+	+		+					
Religious background influences types of performance attended		+		+		+		+		+	+	+	
Prefer single-sensory experience (rel. to multi-sensory)		-		-	-	-	-	-	+		-	-	
Prefer safe choice (rel. to risky choice)				-			-	-	-		+		
<i>Appetite for new work by living artists in ...</i>													
Classical music		+	+		+	+	+		+	+			
Dance	+	+	+	+	+	+	+						
Theater	+	+		+	+	+	+			+	+		
<i>Interested in ...</i>													
Music from the Medieval, Renaissance & Baroque periods			+		+	+	+	+	+		+		
Music from the Classical and Romantic periods			+			+	+	+	+	+	+		
Classical music from the 20th century	+	+	+	+	+	+	+	+	+	+			
<i>Enjoys ...</i>													
Attending pre-performance talks			+	+		+	+	+	+				+
Attending post-performance discussions			+	+		+	+	+					
Reading printed program notes		-	+			+			+		-	-	
Hearing musicians introduce pieces from the stage			+		+			-	+				
Loves that art can be digitized and remixed, sampled	+	+		+	+	+	+	+			+	+	
Attaches a high value to authenticity and historical accuracy	+			+		+	+	+	+	+	+	+	+
Tends to avoid performances of works that may be considered too experimental	-										+		
Takes a strong interest in the artistic legacy and oeuvre of composers and choreographers	+	+	+	+	+	+	+	+	+	+	+	+	+
Seeks out performances that will provide exposure to new artists	+	+	+	+	+	+	+	+	+				+
Will go see just about any performance, even if it is not their favorite	+	+	+	+			+	+					
Tends to avoid performances with a strong political message		+								+	+	+	+
Tends to be offended by vulgar language or sexually suggestive content							-				+		+

VALUES	DANCE				MUSIC				THEATER				
	Ballet	Modern	Jazz or Tap	World Music and Dance	Sym-phon-ic	Chamber	Opera	Jazz	Broadway	Stage Plays	Multi-Media Theatrical	Comedy	Lectures
Supporting environmental causes and conservati	+		+	+			+	+	+				
Being physically active and doing activities that contribute to health				+	+		+	+					
Developing creativity	+	+	+	+	+	+	+	+	+	+	+		
Always exploring, discovering, and looking for r	+	+	+	+	+	+	+	+	+	+	+	+	+
Keeping up with world events and why things happen			+				+	+	+				
Sharpening the mind; intellectual pursuits		+	+	+		+	+	+	+	+			
Being on the bleeding edge of new art and ideas		+	+	+	+	+	+	+	+	+	+	+	
Reflecting upon and processing emotions	+	+	+	+	+	+	+	+	+	+	+	+	
Feeling the extremities of emotion through art	+	+	+	+	+	+	+	+	+	+	+		
Having a spiritual life	+	+	+	+	+	+	+	+		+	+	+	+
Rejecting authority and making up own rule			+				+	+	+				
Pushing self to excel and achieve	+	+	+	+	+	+	+	+	+	+	+	+	+
Strengthening family relationships	+	+	+	+	+	+	+	+		+	+	+	+
Making new friends and expanding their social n	+	+	+	+	+	+	+	+		+	+	+	+
Being involved in civic affairs and working on b	+	+	+	+	+	+	+	+	+	+	+		
Voicing their political views			+						+				
Social justice and equal opportunity	+	+	+	+	+		+	+	+				
Re-paying society for the opportunities and good	+	+	+	+				+	+	+	+		
Working to alleviate other people's suffering	+	+	+	+		+	+	+	+	+	+		
Gaining control over own destiny				+	+		+	+		+	+	+	
Escaping to a make-believe world	+	+	+	+	+	+	+	+		+	+		
Adopting new technologies as quickly as possibl	+	+		+	+	+	+	+		+	+	+	
RECREATIONAL BEHAVIORS													
<i>Interested in ...</i>													
Acting		+	+	+	+	+	+	+					
Book clubs, literature, or poetry groups	+	+	+	+				+	+				
Going out dancing socially	+	+	+	+	+	+	+	+		+		+	+
Movement for exercise/health				+	+			+					
Playing an instrument		+	+			+	+		+	+			
Singing		+	+	+	+	+		+					
Downloading music from the Internet	+	+		+	+	+	+	+		+		+	
Visual arts	+	+	+	+	+	+	+	+					
Craft-making	+	+		+	+	+	+			+			-
<i>Belongs to ...</i>													
Health club, athletic league or program	+					+			-				
Neighborhood association or block group						-	-	-					
School or youth-oriented group		+		+	+		+	+	+			+	
Faith-based organization or group		+		+		+	-						
Library group or book club	+		+		-				+	-			-
Cultural organization volunteer group			+										
Community gardening, park, or nature group				-			-						
Community service or civic group													
Political organization or campaign													
Political views lean liberal		-				-			+	-		-	-