

## **Audience Research Gone Wild**

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#### Introduction

I've given a lot of keynote addresses at arts conferences, but this is the first time I've had an audience of audience researchers, which makes me very nervous.

In the category of damage control, I must confess that I am not an academic – a shortcoming I confront nearly every day. How I wish I had the schooling in research methods that you all have, and I've grown to appreciate the rigor and intellectual clarity that you bring to the field. I've also sat in one too many rooms listening to academic researchers present the findings of their research without a clue as to their implications for practice.

So I want to thank Ben and Katya for the invitation to address you all today, and at the same time encourage you all to take what I say with an enormous grain of salt. I also apologize if my perspective is a little jaded based on being an American at this particular moment of political upheaval.

My instinct is to take this opportunity to offer a sobering overview of the field of audience research, if, in fact, it is a field, and throw down the gauntlet to challenge us all to commit to figuring out better ways of working together.

I apologize in advance if what comes next sounds like a long tale of woe. My criticisms of the field of audience research are many, but they are matched by a strong sense of potential. Indeed, our field is in its early developmental days, sort of like the wild west where life is brutal, but anything is possible.

The first challenge I'll share with you is...

1. The inefficient learning system in the arts sector

This is a problem at the systems level in our field. I would describe the problem in general terms as a near total lack of knowledge management in a highly decentralized field. What makes the learning system inefficient? Specifically, I'm talking about:

- Proprietary research that doesn't circulate beyond the organization that commissioned it, when, in fact, the findings could be very relevant and helpful to a wide range of organizations. The irony is that much of this research, in the US, at least, is funded by philanthropic foundations that ostensibly care about field learning.

- I'm talking about the disciplinary silos and geographical silos that prevent research from paying wider dividends.
- I'm talking about lack of any real coordination on a research agenda for audience research, which I'll revisit in a minute
- I'm talking about Scarce cooperation between and amongst professional consultants and researchers; in the US at least, consultants who specialize in audience research are not a terribly collegial bunch. It's a dog eat dog world. And foundations and agencies do little to bring researchers together to share ideas and methods.
- I'm talking about the lack of a central resource, or cluster of resources, for accessing the accumulated body of research. There are a few worthwhile knowledge aggregation sites, like James Doerer's CultureCase.org, and I'm trying to address this need with CultureLab.org.

I like to say that the nonprofit arts industry is like a huge multinational corporation with 10,000 branch offices and no headquarters. The decentralized nature of the field has both strengths and weaknesses. Innovation bubbles up all over the place – that's a strength – but the downside of a decentralized system is redundancy and inefficiency. Every year, foundations and donors fund staggering inefficiencies, preserving a latticework of redundant research and redundant “Innovations.” Arts groups are notorious for applying for grant funding to pilot test “innovative” new practices that have, in fact, been tried scores of time in other cities. The problem is, there's no place for practitioners to go to find out what's been researched, what's been piloted, what's been evaluated, and what might be tried again. This is particularly acute in the area of audience development. We have a field that is doing the same experiments over and over again, for lack of a better knowledge management system. We have a field that is not learning from itself quickly enough. And we have funders that are complicit in indulging the field's infatuation with innovation.

Philanthropic foundations are particularly guilty of perpetuating knowledge silos, a problem that is endemic to the way they make grants. In most foundations, grantmaking is competitive. There are winners and losers. Winners get all the money. Losers get nothing and have no incentive to learn alongside the winners. Winners, meanwhile, have few incentives to share what they learn with the losers. I couldn't think of a more hostile environment for field learning.

The audience research field that supports the cultural sector shares its decentralized nature. We are a wild bunch, all spinning in our own orbits except for the rare opportunities like today when we can come together to step back from our work and take stock of the field we care about so deeply.

But without a coordinated system of diffusion, most of the research and learning in our field evaporates into the ether. I use the term “diffusion” so as not to confuse dissemination with learning. I don't know too many practitioners who actually read research reports these days, except for highly pre-digested summaries. The more we

are inundated with digital content, the more I've come to understand learning as a social phenomenon. We can't just publish things and think we're contributing to field learning. We need to create entirely new incentives and systems for learning.

Inefficiencies in the learning system is one of those problems without an owner. I'm trying to interest some funders and service organizations in joining together to deal with it, but they mostly want to do their own thing within their own silos. The irony is that with another 5% of investment beyond the amounts of their grants, foundations could fund the most incredible knowledge management system in the world.

I would argue that we, the community of audience researchers, can own some of this problem, to the extent that we have leverage with funders, and to the extent that we can lift our own conceptualization of field learning to a higher level. So, I ask you all to consider how we, as a community of researchers, can make the learning system more efficient, and thereby magnify the value of our research multifold.

The second challenge I'll share with you is...

2. Lack of coordination of research efforts as evidenced by a vacuum of leadership in setting research agendas

There is no coordinated arts research agenda in the U.S., much less an agenda for audience research. The National Endowment for the Arts has a research plan for the next five years, which includes some priorities in the realm of audience research, including research on **individual level outcomes** resulting directly from Arts Participation, and research on **societal and community-level outcomes** resulting from the presence of Arts and Cultural Assets in communities. More specifically, the NEA identifies several areas of "arts benefits" for future research:

- Cognition, Creativity, and Learning (e.g., improvements in problem - solving capacity, divergent thinking, memory retention, or transfer in learning)
- Social and Emotional Well-Being (e.g., improvements in resilience, grit, mood regulation, or perspective-taking)
- Physiological Processes of Health and Healing (e.g., reduction of neurocognitive or motor skills degeneration; reduction of pain; or improved circulation)

When asked to provide feedback on the NEA's research agenda, I asked if there was a role for the NEA in facilitating the setting of a national agenda for arts research, and was told "no." If it's not the job of the national arts agency to coordinate a research agenda for the arts, then whose job is it? I recall attending a meeting of leaders in the orchestra field in 2008 to map out a research agenda for that field. I dug it out of the digital cobwebs last night and read it again, and I'm happy to share it with any of you. Most of the research agenda is inwardly focused – questions about how orchestras operate. But some of the questions are about audience. Mind you this is now 10 years old, and I quote:

- “What can we learn about the relationship between programming and attendance? To what extent will musically literate non-attenders respond to new concert formats and/or new repertoire? To what extent will such initiatives drive away the current audience?”
- “Who are the young classical-music listeners who are not yet orchestra audience members, and how do their tastes evolve? How do they discover classical music? How do orchestras market to them?”
- “What is the relationship between attending classical-music concerts and consuming classical music through radio and recordings? To what extent and under what conditions are these activities complements? To what extent and under what conditions are they substitutes?”

My point in sharing this with you is that research agendas, when they exist at all, have a long shelf life. If we could focus ourselves on coordinating an agenda for audience research, or even just identifying the major veins of work, our field would be greatly enriched. Lacking such an agenda, or even just a taxonomy of work, research is repeated over and over again without regard to previous work. It is such a tragic waste of resources.

It is simply stunning to me that philanthropic foundations and federal arts agencies in developed countries haven’t allocated millions of dollars for researchers to come together to discuss and debate research agendas for our field, and to develop better systems of knowledge management and dissemination and uptake of research. This is a catastrophic failure of cultural policy. And the development of the sector has been stunted because of it. I’m not saying that important research isn’t being done – a lot of amazing research is being done. Rather, I’m saying that the intellectual ecology and support systems in which research is being done are structurally deficient.

The third challenge I’ll share with you is...

3. Lack of government or philanthropic funding for foundational research that could influence the kinds of arts programs that get produced and presented

Several months ago I was listening to a science program on National Public Radio about the latest breakthrough in genetic research. Scientists have discovered how to modify DNA in a live embryo, raising hopes that couples with a history of hereditary diseases can have healthy children. Of course this also raises the specter of “designer babies,” to quote the New York Times, “...allowing parents to custom order a baby with Lin-Manuel Miranda’s imagination or Usain Bolt’s speed...” To hell with ethics, I thought, maybe we could genetically engineer heterosexual men who enjoy contemporary dance.

Seriously, what is the analog in our field to basic scientific research?

Investments in research and development are the lifeblood of the commercial sector – the wellspring from which ideas for new products take root and grow. In the arts, we rely on artists and curators instead of product designers and scientists to propel the field artistically forward. In this sense, commissioning new work, and curating new exhibitions, can be understood as a highly decentralized approach to “R&D.” But there is an entire layer of foundational research that is nearly absent from the sector – research on trends in consumption patterns and the changing aesthetics of the marketplace.

What is happening with public tastes in art? How is the aesthetic landscape changing?

For example, to what degree is music a visual experience for younger generations, and what does that portend for music producers? With few exceptions, I don’t see anyone in the nonprofit arts sector doing the basic R&D necessary to bring forth new technological innovations or artistic approaches to music visualization in the concert hall, for example. Similarly, what are the long-term effects on the brain of listening to music in random order? How have the reality television shows changed public tastes in dance? It appears to me that demographic diversification and the distribution of art and ideas through digital media has served to diffuse cultural tastes, which, in turn, has increased demand for interdisciplinary artistic work. Is this true? If so, what are the implications for a sector that is constructed in large part based on disciplinary boundaries that don’t matter any longer to consumers?

Results from foundational research could inspire entirely new veins of artistic work. Unfortunately, artists and curators – the primary beneficiaries of such research – are likely to dismiss trend research as commercially driven and an affront to their artistic autonomy. Here, again, is an area where we have a lot of work to do.

Our sector cannot thrive without basic research that addresses fundamental questions about human interaction with art.

The fourth challenge I’ll share with you is...

#### 4. The need for methodological innovation in applied research

The belief that online surveys are the answer to everything has resulted in a crisis of low response rates, a rise in self-selection bias and the abandonment of standards of methodological rigor associated with social science research. We have to figure out better ways of sampling audiences and non-attenders, because we cannot continue thinking that the people who respond to online surveys are somehow representative of the entire population of ticket buyers, much less the totality of the audience, which of course is dominated by non-buyers. We know that people who are loyal to organizations respond at 2 to 3 times the rate of less loyal patrons. We also know there’s a gender bias in that women respond to surveys more often than men. Weighting results can help, but it doesn’t solve the underlying problem.

Studies drawing on commercial panels are the evil twin of online audience studies. For the most part, they're just people who've signed up to take surveys. The only subcontractor I've ever fired misrepresented the results of an online panel as being representative of the general population of New York City.

I think we're going to have to start recruiting randomly-selected panels of audience members to serve as research subjects for all sorts of studies. I don't know how else we can get around the problem. In any case, it seems that our field is in dire need of some fresh air in the form of improved methods.

We need to tap into the power of ethnographic research. Recently I made a proposal to a major dance company, which had money from a major foundation to conduct research on how to attract more younger adults to its performances. The RFP asked for focus groups and a panel study. I proposed ethnographic research to follow some young people around New York City to see what they do for fun. Instead of commercial panel, I proposed an online survey for which recruitment would take place exclusively through social media – where younger adults hang out. I wish I had recorded the telephone during which I was told “We could never do that!” because I'd like to play it back over and over again. This is my Joan of Arc complex – proposing research methods that are not specified, just to disrupt thinking.

So, I ask you all to think about the role you can play in introducing a wider array of methods, especially ethnographic and other qualitative methods involving observation. For example, what if we asked whole communities of people to chronicle their arts experiences in an online scrapbook – a place for them to preserve memories of all of their arts experiences, and perhaps even share them with friends. Imagine if you had a digital scrapbook of your arts experiences over the last 10 or 15 years, which you could revisit at any time. Memory is meaning. Over time, the scrapbooks would become an invaluable source of data on shifting patterns of arts participation.

The fifth challenge I'll share with you is...

5. The need for a stronger bridge between theoretical research and applied research, particularly in developing stronger theoretical conceptualizations of audiences that have tactical implications for arts organizations

I'm thinking here about great amount of emphasis on applied research in the area of audience development but the lack of relevant conceptual frameworks for understanding audience preferences and behaviors. The frontier of audience development lies in building a stronger bridge between applied research and theoretical frameworks for understanding audiences according to their preferences, tastes, cultural contexts, and behaviors.

As a field we've progressed from demographic segmentation to psychographic segmentation to sophisticated behavioral segmentation based on transactional data, and now the emergence of general population segmentation schemes based on a confluence of demographic and psychographic data overlaid with inferred data from participation surveys. The focus we see now on predictive modeling based on transactional data is helpful but ultimately limiting in that we need better audience models that transcend purchase behaviors. We cannot keep modeling audiences on transaction data, if we want to attract new audiences.

I believe we are at the point now in our development as a field that we are limited by outdated conceptualizations of audiences and would benefit from new frameworks. One particular framework I hope to explore soon is the notion of "taste communities," a term that derives from social media.

The sixth and final challenge I'll share with you is...

6. Sector-wide shortcomings in how we build capacity within arts organizations to learn through applied research

Most research activity is siloed in large budget organizations, although we find a high capacity to learn in some of our work with smaller organizations. There are serious questions about the extent to which arts organizations can be expected to understand or engage with research. We need to work that out as a field. Is it reasonable to think that all arts organizations should internalize a capacity to collect data from audiences? If not, what is a realistic expectation? If not, how do arts organizations access good research? What kinds of research capacities can be provided through service organizations or other support agencies?

The most pressing need in the cultural sector is to build more cultural value around learning. The most successful people in the field are constantly learning and challenging their assumptions. The most successful organizations foster a culture of inquiry and have a hard-wired connection to their audience and community.

However, the predominant mode is one of "emergency learning," which basically means that you Google something and click on the first link and learn something immediately before you have to know it. I've come to the conclusion that most arts practitioners are not going to access written knowledge like research reports on their own. Rather, the most effective form of learning comes through human-to-human contact. So, I would like to see large scale learning exercises, sponsored by the national service organizations, where board and staff members of arts groups across the country spend a day or two every year interviewing audience members and talking about what they learn. Honestly, I think this would take the field much farther than any scholarly research initiative. It's so unfortunate that arts groups, with their regular inflow of audiences and visitors, aren't talking with them more often. The irony is that most audience members would be happy to come an hour early and participate in an interview or focus group – for a cookie.

## Future Research Priorities

To close, I'd like to offer some ideas for future work in the field of audience research.

- First of all, I have to advocate for a better conceptual framework for audience research. If we can't define our field, we shouldn't really claim that we're a field at all. What are the key domains of investigation, and the sub-domains? Can we map out the intersections of audience research with the fields of sociology, psychology, aesthetics, the learning sciences, fields of medical research including brain science, and other fields of research?
- I worry a great deal about the problem of survey fatigue, arising from the convenience of online surveying, and the ethical and practical problems of asking audience member repeatedly and endlessly to take surveys, and the abuses. Audience members click "Submit" on surveys and have no idea what happens to the information they provide. There is a near total lack of transparency about the findings of audience research, which, I think undermines the credibility of organizations and reduces the willingness of audiences to spend their precious time filling out surveys. This is something we're trying to improve in our own practice at WolfBrown, by jumping survey takers to a page of results from the survey they've just taken. In the larger picture, I think we should look for opportunities to re-frame audience research as audience engagement – as a means of more deeply engaging patrons in critical reflection on their interactions with works of art.
- We need stronger research partnerships with the commercial sector. What can we learn from YouTube, Pandora, Spotify and Apple about music preferences? What can we learn from Netflix about preferences for drama?
- Building participation and expanding the audience has been a significant focus over the past 15 to 20 years for both funders and individual arts groups. Yet, little is known about how cultural tastes evolve over time, or how individuals progress through aesthetic relationships with different forms of art. Arts participation research is typically conducted on a "snapshot" basis, offering valuable behavioral information about the "here and now of participation." Changes in patterns of participation can be found by comparing data from repeated snapshots, yet we still lack a fundamental understanding of how children and adults progress through the arts over time – not just behaviorally, but attitudinally as well. How, for example, does an individual's taste in theatre progress over a lifetime? What are the pathways to aesthetic expansion? What are the milestone events? Until we can gain a foundational understanding of "preference discovery" – how aesthetics are transmitted and acquired over time – we will never fully grasp how to build demand. This will require intensive diary studies and ethnographic work over many years. But *not* making the investment in longitudinal work invites the steepest costs of all: false assumptions about

demand, and an incomplete understanding of how to propel children and adults through a lifelong arc of artistic exploration.

- Supply side analysis. What is actually changing about the art forms themselves? What is being presented, and how is it changing? How are the forms amalgamating and recombining in new ways? What are the most promising frontiers of arts programming? A vast amount of arts programming moves through the ecology every year, but there are few attempts to make sense of the changing aesthetic landscape. I am vaguely aware of academic research on trends in repertory selection by orchestras, but this sort of research has not reached practitioners. Supply side research is important because it paints a picture, however incomplete, of the totality of the aesthetic universe, thus illuminating both what is, and what is not, being programmed.
- Research on the downstream impacts of arts experiences. While feedback on the immediate effects of the experience can be useful, they are only a part of a larger and longer story. How does impact decay? What does impact look like six months later? Six years later? Why do the impacts of certain arts experiences last a lifetime, while others dissipate entirely? What social contexts, settings and social and educational stimuli add to the resilience of memory? And, most importantly, how does the accumulation of arts experiences – and the memories thereof – relate to quality of life? For both cost and methodological reasons, research on the accrued benefits of adult participation is scarce. If we are ever going to assemble a body of compelling evidence for the arts – their capacity to change lives over time – we must face down the complications and costs of longitudinal assessment of impact.
- Finally, I would like to advocate for the study of ritual and the construction of meaning through ritualism, and the possibilities for arts organizations to create new rituals that bring people together from different backgrounds.

The study of audiences is the study of the lifelong journey that individuals take through the art forms. As researchers, we, too, are on a similar lifelong journey to develop more nuanced understandings of audiences and how they interact with art. Perhaps we lack the willpower to reflect critically on our own work. Perhaps there is still too much discomfort with the role of research in an artistically driven field. Or, perhaps we have yet to learn how to design research in a way that engages artists and arts administrators in a supportive dialogue about their work and builds demand for more research.

If we are successful in facing down some of the challenges I've mentioned today, our research can fuel a new era of creativity in programming, which, in turn, will attract a new generation of audiences.

Thank you.