

## A Place of Gathering: Understanding Consumer Preferences in the Performing Arts

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**Abstract:** *According to the U.S.-based National Endowment for the Arts (NEA, 2009), American audiences for performing arts are declining and aging. According to the NEA, these trends are not attributable to the economic downturn but reflect deeper and more systemic sociocultural shifts. Americans are increasingly participating in newer media forms. For public performing arts centres, these data are alarming. For communities, they have very real implications, for arts participation is highly correlated with civic participation, ranging from volunteerism to attendance of community activities. We present a case study of an historic performing arts centre and its efforts to adapt to changing consumer preferences as it faces stiffening competition, diminishing ticket sales, and loss of public revenues. Methods employed include an on-line survey, focus groups, and depth interviews.*

*Findings suggest that Midwestern American consumers desire “accessible” arts and are concerned with managing tensions created by opposing desires for traditional arts (indicative of deep historical ties) and increasingly imaginative forms of arts expression. While consumers express sympathy for the plight of arts organizations, this does not diminish their demands. They call for facilities to meet increasingly diverse needs, and provide, in the words of one informant “a place of gathering for culture” that benefits the entire community.*

**Keywords:** *entertainment marketing, performing arts, multi-methods, case study, ethnography*

### 1. INTRODUCTION

*The future of the performing arts will be shaped by many factors, but perhaps none is more important than the future structure of demand.*

*--McCarthy, Brooks, Lowell, and Zakaras, 2001*

According to a recent study by the U.S.-based National Endowment for the Arts (NEA [National Endowment for the Arts, 2009]), in the United States audiences for performing arts (ballet, classical music, jazz, and theatre) are both declining and aging. In fact, the arts audience has aged faster than the general population. Participation in key activities such as attending live performance and visiting museums has declined by roughly five per cent in recent years. According to the NEA, these trends are not attributable to the recent economic downturn but reflect deeper and more systemic sociocultural shifts. Americans are increasingly participating in newer media forms. For public performing arts centres, these data are alarming. For communities, they have very real implications, for arts participation in the U.S. is highly correlated with civic participation, ranging from volunteerism to attendance of community activities. Moreover, the arts, entertainment, and recreation industry employs nearly two million Americans (an average of 39,000 individuals per state; Department of Labor, 2010); roughly six per cent of this industry is categorized as “performing arts.” This makes it important to not only the American cultural fabric, but to its economic structure, as well.

The literature offers alternative perspectives and theories regarding understanding this market. These include economic, socio-cultural, and public policy approaches. Various, they reflect financial considerations, entrepreneurial dynamics, and shifts in social and cultural mores. In many respects, however, they fail to integrate consumer voice into the conversation. This paper contributes to the discussion by reporting the findings of a multi-method study designed to understand consumer needs concerning, and response to, community-supported performing arts initiatives. Methods employed include on-line surveys, focus groups, and depth interviews with consumers of a single, focal Midwestern American performing arts centre. Findings suggest that as age increases, so do economic expectations. As age decreases, cultural expectations rise. Younger consumers share the broader American population’s desire for “accessible” arts. While these consumers express sympathy for the plight of arts organizations, this does not diminish their demands on these. With or without public support, these consumers call for facilities that meet increasingly diverse and multiplex needs. They did not, however, necessarily favour emergent art forms. In fact, they expressed increasingly concern with managing tensions created by opposing desires for traditional arts (indicative of deep historical ties to and within communities) and desires for increasingly imaginative and

contemporary forms of arts expression that would allow CPAC, in the words of one informant, to become “a place of gathering for culture and events that the overall community benefits from.”

## 2. THEORETICAL PERSPECTIVES

Work by Wacholtz and Wilgus (2011) is consistent with many economic-based theories of performing arts management. They maintain, for example, that “(s)uccess in the performing arts is measured, like all industries, financially. And, because of the financial motivation, prediction of talent’s success is a large endeavour throughout the industry” (p. 23). Consistent with this approach, but espousing a broader viewpoint, is work by theorists such as Rentschler, Radbourne, Carr and Rickard (2001) who remain focused on financial returns on investments but advocate a shift from product development and towards development of long-term customer relationships. Their emphasis on relationship building, however, concerns more transactional features of relationships, such as “spur of the moment ticket purchases” by youth (p. 126) than on developing keener insights into the social worlds in which youth reside.

In the United States, public discussion concerning arts policy has shifted from focusing on public funding concerns and toward a more general conversation about the public purposes and benefits of the arts (American Assembly, 1997). It is increasingly believed that a pluralistic democratic society should nurture and support arts activities that reflect the interests and tastes of the entire population rather than the cultural elite (McCarthy, Brooks, Lowell, and Zakaras, 2001). Consistent with this discussion is theoretical work that supports a conceptualization of consumers as increasingly culturally omnivorous (cf., Warde, Martens, and Olsen, 1999), particularly among some social groups (Warde, Martens, and Olsen, 1999) and within industries marked by innovation and change (Peterson and Kern, 1996).

## 3. METHOD

### 3.1 Setting

This case study examines consumers in a Midwestern U.S. city (population approximately 125,000) as they relate to a focal performing arts centre. In 2009, there were more than 3,200 theatre companies and dinner theatres in the United States (U.S Census, 2010). Among these is the City Performing Arts Center (CPAC)<sup>50</sup>. CPAC has offered a range of comedians, musicians, actors and other venues for over 100 years to its host community. Like many of its contemporaries, in recent years, CPAC has experienced a decline in ticket sales. Moreover, state-wide budget cuts have affected CPAC. In addition, CPAC has seen a direct threat from a large competitor base in the surrounding area. There are currently 34 direct competitors within a 150 mile radius of CPAC.

CPAC has deep roots in the local community. Located in the downtown, it has provided entertainment to area residents since the 1880’s, offering a range of comedians, musicians, actors, and other venues. Annual events, such as The Nutcracker Ballet, capitalize on the extravagant elegance that CPAC offers. Originally, the City Auditorium, it once shared a fire station and offices for the city. Performers have ranged from classical musicians to hip hop artists, from controversial comedians to children’s productions.

According to the National Endowment for the Arts (NEA), there has been a state wide funding decrease for the arts in Kansas and the state plans to reduce state funding to at \$200,000 subsidy, overseen by a private, non-profit Kansas Arts Foundation. The decrease has created a barrier for the performing arts, as well as arts in general, in Kansas (Hanna, 2011). According to CPAC’s executive director, state-wide budget cuts have affected CPAC. “It is very difficult to see how CPAC can continue to operate for more than a couple more years at the proposed level of funding,” she commented in a recent interview (Blankenship, 2011). In addition, there is a large competitor base in the surrounding area as well. Venues such as Memorial Hall, Uptown Theatre, Lied Center of Kansas, McCain Auditorium, Steifel for Performing Arts and The Orpheum Theatre pose a threat to the success of CPAC. Each of these competitors has a seating capacity comparable to that of CPAC. Despite having much to offer, CPAC has experienced declining ticket sales. This project is designed to help understand this phenomenon.

### 3.2 Methodological Approaches

This study was exploratory in nature and used a grounded approach to discovery. Methods for collecting consumer input employed included an on-line survey, focus groups, and depth interviews. The survey and focus groups utilized a very similar structure. In both events, consumer awareness of CPAC was captured, as well respondent demographics. Focus groups were unique in that they explored consumer feelings much more deeply. Three were conducted with member numbers ranging from nine to 20 individuals, for a total participant number of 32. Both focus groups and the on-line survey adapted Aaker’s (1997) scale of brand personality to explore consumers’ underlying feelings about the CPAC brand and, in

the case of focus groups, the CPAC logo. Significant attention has been given to the brand personality construct by consumer behaviourists. Aaker's (1997) framework of brand personality highlights five dimensions (sincerity, excitement, competence, sophistication, and ruggedness). Among these five, sincere and exciting brand personalities capture much of the variance in personality ratings of brands.

Surveys were not designed to produce quantitative significant results, but rather to offer informants a convenient means of participating. Sixty-nine usable surveys were returned. Depth interviews were conducted with 20 individuals who had ties to CPAC including the current and past boards of directors and members of the donor base. Data from the survey were analysed utilizing SPSS and employing traditional quantitative analysis tools. Results of these analyses are presented with the body of the discussion of the findings rather than as statistical tables of results because the small number of responses makes claims regarding statistical significance null.

#### **4. FINDINGS**

The grounded approach to exploratory research requires that researchers make no assumptions about underlying expectations or belief structures of informants. We had, therefore, no expectations of the extent to which informants might favour the theoretical approaches represented in the literature or adopt an altogether different ideology. In some respects, the findings of this study align informants with the economic and cultural theories neatly along an age continuum. As age increases, so do economic expectations. As age decreases, cultural expectations rise. In this study, the management and donor base was, as a whole, older than other survey respondents. These individuals spoke of their relationship with CPAC in largely economic terms. Those that had decreased contributions to the organization, had done so for economic reasons. Those who supported broadening product offerings (e.g., bringing more youth-oriented or controversial artists to CPAC), did so in the belief that this change in direction would allow CPAC to meet its financial – rather than social or cultural – goals.

Interviews with managers and donors suggest that the target audience currently identified reflects demographic and psychographic characteristics of these: middle to upper income, Caucasian, both single and married, with a median age in the late 50's. These may be problematic, as brand control resides with these individuals. Focus groups and surveys suggest that the CPAC brand is not well received by the broader consumer basis. The CPAC brand and logo were described by informants in terms such as "boring," "old," "out-dated," "obsolete" whereas donor/managers used terms such as "traditional," "established," and "refined." Results utilizing Aaker's brand personality scale found that the CPAC brand is seen by consumers as honest, wholesome, cheerful, reliable and intelligent. It is least depicted using the terms down to earth, daring, imaginative, up-to-date, and successful.

Younger consumers share the broader American population's desire for "accessible" arts. While these consumers express sympathy for the plight of arts organizations, this does not diminish their demands on these. With or without public support, these consumers call for facilities that meet increasingly diverse and multiplex needs. They did not, however, necessarily favour emergent art forms. In fact, they expressed increasingly concern with managing tensions created by opposing desires for traditional arts (indicative of deep historical ties to and within communities) and desires for increasingly imaginative and contemporary forms of arts expression that would allow CPAC, in the words of one informant, to become "a place of gathering for culture and events that the overall community benefits from."

#### **5. DISCUSSION**

The economic, cultural, social, and psychological benefits of entertainment venues are well documented. These have been associated with a wide range of positive outcomes at both the macro (community) and micro (consumer) level. What is at question is the methods by which these may remain relevant to consumer's lives and experience in the face of economic and marketplace challenges and social and cultural paradigm shifts. We undertook this study on behalf of a specific performing arts centre in the Midwestern United States. While we have stated our findings in general terms, they are not generalizable outside of the current context. They are provided merely to offer insights into the challenges faced by like entities and to propose solutions to commonly-held problems. The study itself was exploratory nature and findings are tentative. Additional data should be collected before CPAC can consider these conclusive. Despite these cautions, the data suggest three important rules for performing arts centres in order to manage relevancy. First, performing arts centres must self-identify as places of social interaction. Second, they must embrace the concept of cultural omnivorousness. Third, they must help consumers manage their own tensions as they struggle to reconcile their own cultural and social identities. In this study, it becomes apparent that consumers remain committed to physically structured and locally embedded institutions for their guidance in this process. We discuss each of these ideas, in turn.

Macromarketers argue that markets are systems with antecedents, which vary across cultures and across time, and activities, that have consequences beyond the buyers and sellers in an exchange (Mittelstaedt, Kilbourne, and Mittelstaedt, 2006). The

functions of marketing, then, are best understood against the backdrop of society. This necessarily implies a tension between governing market logic and communal relations (Pryor and Grossbart, 2005). Markets, it has been argued, have the capacity to repress and “directly affect individual consumers by homogenizing them and suppressing their self-expressive capabilities” (Kozinets, 2002, p. 22). How does one, then, manage marketing functions, particularly those which are highly experiential? The first lesson of the current study for performing arts centres is one of self-critique and recognition that such tensions exist and that by focusing on macro-level needs of consumers, they may be not merely resolved but made useful. Adoption of those same historical properties which produced the Greek agora is prescriptive. The agora functioned not merely as a marketplace but as the “heart of an ancient city” (Camp 1986, 14).

The second lesson requires recognition that, at least in the United States, consumers “no longer recognize any fixed cultural hierarchy, and that, instead, individuals seek knowledge of an increasingly wide variety of aesthetically equivalent cultural genres” (Warde, Martens and Olsen, 1999 p. 105) and term this idea “cultural omnivorousness.” Unpacking this idea means not merely offering a wide range of product offerings, but understanding the underlying paradigm shift that has occurred in the culture industries. Consumers no longer look to retailers of cultural products to define culture; they do, however, look to these to provide access to cultural material. This is particularly true in industries which produce an unending procession of alternatively new and established products and services (Peterson and Kern 1996).

Finally, and relatedly, the third lesson is that that performing arts centres may and should continue to play an important role in this process, from the perspective of consumers. Simmel (1968) suggests that cultural variety poses a problem for consumers as they attempt to interpret the relevance and value of the cultural goods, recognizing that both ignorance and vulgarity in one’s preferences may mark one as socially and culturally inferior. Modern consumerism has been identified as a source of anxiety for consumers and the adoption of an omnivore strategy, which provides access to the development of a repertoire of knowledge of many cultural elements, a coping mechanism for some (Warde, Martens and Olsen, 1999).

Consumer behaviour researchers have suggested that brand personality is a vehicle of consumer self-expression and can be instrumental in helping consumers express their actual self, ideal self, or specific aspects of the self (Belk 1988). In the current study, despite consumers’ unwillingness to identify CPAC as imaginative, daring, or successful, they still found the centre wholesome, cheerful, reliable and intelligent. Across interviews, focus groups, and surveys, consumers voiced not merely support for the centre’s mission but a deeply held and normative view of its rightful ownership of that role. In each event, consumers failed to identify CPAC as currently presenting a successful personality but in each, they suggested that successfulness was an appropriate idealized personal for CPAC to pursue. The performing arts centre, in summary, has the opportunity to create a socially rich, culturally omnivorous, and personally relevant entity which identifies and responds to acutely felt consumer desires. Consumers in this study were fully utilizing emergent art forms but were unwilling to concede to these newer cultural vehicles the same rights and privileges they accede to more traditional, local, and communal arts centres.

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