



Reimagining Customer Relationships

Report on a Two-Day Gathering of Canadian Arts Practitioners, Nov. 13-14, 2024

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List of Participants

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- Natasha Harwood, Director, Arts Alive, National Arts Centre (NAC)
- Jennifer MacDonald, General Manager, National Arts Centre (NAC)
- Kondwani Mwase, Executive Director, Audience Engagement, National Arts Centre (NAC)
- Shannon Urie, Marketing Director, National Arts Centre (NAC)

CAPACOA Invitees

- Nicholas Beach, General Manager, Jeanne & Peter Loughheed Performing Arts Centre
- Eugene Carnegie, Director, Theatre & Arts Centre, Keyano Theatre
- Domenic Di Loreto, Patron Services Coordinator, City of Ottawa
- Mhiran Faraday, Executive Director, Ottawa Chamberfest
- Julie Fossitt, Manager, Marketing and Revenue Development, City of Kingston
- Jessica Fowles, Marketing Manager, Evergreen Cultural Centre
- Lindsay Jacquard, Sponsorship & Patron Services Manager, Imperial Theatre
- Crystal Kolt, Director of Culture and Community Initiatives, City of Flin Flon
- Kaitlyn Mitchell, General Manager, Western Manitoba Centennial Auditorium
- Andrea Noble, Marketing & Community Outreach Coordinator, The Port Theatre Society
- Tirumalai (TK) Raghunathan, Artistic Director, KABIR CULTURAL CENTRE
- Theresia Reid, Operations Manager, Chilliwack Cultural Centre
- Jeff Richardson, Director of Growth & Development, Fredericton Playhouse
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Orchestras Canada Invitees

- Megan Benjafield, Board Member / Music Education Manager, Orchestras Canada / Hamilton Philharmonic Orchestra
- Jaelem Bhate, Music Director, Prince Edward Island Symphony Orchestra
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- Janet Bwititi, Director, Marketing + Strategic Communications, Calgary Philharmonic Orchestra
- Katherine Carleton, Executive Director, Orchestras Canada/Orchestres Canada
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- Marcus Glover, Director of Marketing & Communications, Symphony Nova Scotia
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- Marie-Andrée Paulin, Directrice des communications et du marketing, Les Violons du Roy
- Roberta Smith, Vice President & Chief of Staff, Toronto Symphony
- Peter Sametz, Director of Operations, Symphony New Brunswick
- Mark Turner, CEO and Creative Producer, Saskatoon Symphony Orchestra
- Boran Zaza, Director of Communications & Development, Orchestras Canada/Orchestres Canada

PACT Invitees

- Peter Cathie White, Executive Director, Arts Club Theatre Company
- Brett Christopher, Managing Artistic Director, Thousand Islands Playhouse
- David Connolly, Associate Artistic Director, Drayton Entertainment
- Richard Davis, Director, Arts Policy, Canadian Heritage
- Kristen Dion, Executive Director, Vertigo Theatre
- Heather Ervin, Director of Development & Community Engagement, Globe Theatre
- Anita Gaffney, Executive Director, Stratford Festival
- Evelyn Goj, Director of Marketing & Communications, Vertigo Theatre
- Celina Hawkins, Company Manager, Great Canadian Theatre Company
- Tim Jennings, Executive Director/CEO, Shaw Festival
- John Karastamatis, Director of Communications & Programming, Mirvish Productions
- Steven Karcher, Executive Director, Drayton Entertainment
- Greg Klassen, Director of Marketing and Communications, Manitoba Theatre for Young People
- Nicholas Leno, Artistic Producer, Theatre Newfoundland Labrador
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Facilitators and Observers

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- Metcalf Foundation



Project Context and Purpose

The performing arts sector in Canada is facing major challenges around customer loyalty and affiliation. Shifts in consumer behaviors that both predated and were accelerated by the Covid-19 pandemic have led to a decline in subscription ticket sales, a prevalence of single-ticket buying, and the rise of late buying behaviors.

Hierarchical, transactional models for patron engagement are now almost 50 years old (i.e., “Subscribe Now!”). While the classic models of subscription and series ticket products are still valued by many patrons and organizations, it has become increasingly apparent that other, additional approaches to forging and maintaining relationships with customers are urgently needed.

Many arts organizations’ customer databases are proportionally skewed towards patrons who attend infrequently or just once. Historically, those patrons who attend more frequently and who spend the most have been, quite naturally, the most valued customers. In focusing so intently on moving patrons towards the top end of the “donor/patron pyramid,” we have overlooked the asset that Malcolm Gladwell calls “the strength of weak ties.” Is it possible to have sustained, mission-driven relationships with people who can’t come to our live performances as often as we’d like them to for one reason or another? What might those relationships look like if we were to value and nurture them? Could they be financially fruitful?

A good deal of [experimentation with new practices](#) in forging customer relationships is indeed happening, as evidenced by the high-level exchange of information about new practices at the Ottawa convening on Nov. 13-14, 2024. The highly decentralized structure of the field, however, pushes against the rapid diffusion of new practices. Information is exchanged across organizations, but in a happenstance manner, if at all. Multi-site pilot projects or organized “experiments” with a clear hypothesis and a strong research component almost never happen.

The purpose of the “Reimagining Customer Relationships” (RCR) project is to build a new “system of R&D” for designing, testing, and refining promising new practices in building stronger customer relationships – new points of connection, new affiliations, new affinities – and then accelerating the adoption of good practices field-wide. The focus here is on developing *replicable* strategies that deepen loyalty and cultivate affinity among *infrequent* or *occasional* audiences, and attract new audiences. In doing this, we aim to tear down the walls of proprietary and privileged access to information and instead make the information about these practices available to the entire

performing arts sector in real time, so as to encourage replication and continual learning.

Commissioned by a consortium of national service organizations (CAPACOA, PACT and Orchestras Canada) working in tandem with the National Art Centre, the RCR project grew out of a collective realization that there is an urgent need for larger scale, multi-site experiments that will fast-forward the performing arts sector in developing new approaches to engaging the public. This is underscored by what appears to be a shrinking pool of resources for R&D at the very time it is most needed.

Overall RCR Theory of Change

By animating different kinds of relationships with a broader cross-section of customers, including those who can't or won't frequently attend live performances, performing arts groups can more fully deliver on their mission and strengthen revenue streams.

What is Different about This Approach?

Because the sector is so decentralized, funding for R&D tends to be siloed in individual organizations, typically large-budget companies that secure grant funding to undertake an audience development experiment of some sort. The learnings that stem from these experiments seldom reach the sector in a timely fashion, or in a format that is actionable by other organizations. In sum, most of the R&D in our sector consists of one-site, one-off experiments that often play out in a proprietary vacuum.

Re-imaging Customer Relationships, however, is defined as a collaborative effort to implement multi-site, iterative experiments supported by research and evaluation that immediately pay dividends to the field. Unlike other grant programs supporting audience development, this initiative is not motivated by the self-interest of grant funding. Organizations that choose to participate in future phases of this project will not receive project grants and will not be accountable to funders. Rather, they'll work in cohorts, and work within their limited capacities, enriching and building on each other's work, and therefore be accountable to the cohort and, ultimately, to themselves.

That being said, the sponsors of the project hope to generate funding to cover shared expenses associated with the experiments, including facilitation, research, evaluation, and rapid field learning.

The multi-site experiments or "field studies" that flow out of the initial phase of thinking will aim to follow the principles of good experiment design:

- A clear and compelling theory of change that articulates the assumptions and logic behind the experiment (i.e., a “causal pathway” that explains the assumptions that clarify why your project will cause the intended outcome)
- With multiple sites comes the opportunity to test variants of the theory of change (e.g., membership program A, membership program B)
- A deliberate approach to multiple cycles of design, testing and piloting (i.e., “fail early and often”)
- Clarity around how success will be measured, and full transparency
- A “community of practice” cohort structure that maximizes learning within the cohort, and also allows for rapid transference of learning outside of the cohort.

We are hopeful that the sum of these activities can induce a system-level transformation and lead to the adoption of new customer loyalty and affiliation practices across the performing arts sector in Canada. Moreover, we hope that the initiative raises awareness of organizations and funders as to the importance of multi-site, multi-disciplinary R&D.

Community Gathering, November 13-14, 2024 in Ottawa

The community gathering at National Arts Centre on Nov. 13-14, 2024 was intended as an opening salvo in the larger process of accelerating the adoption of good practices aimed at strengthening customer relationships. Specifically, the goal of the community gathering was to generate ideas and move towards consensus on which of the five field studies and other activities should be advanced to the next phase of the project.

The project partners (CAPACOA, PACT, Orchestras Canada) invited a cross-section of their respective members to attend. The selection criteria considered regional and demographic diversity (i.e., community size and make-up) and organizational diversity (i.e., artistic focus, audience focus, organization type, and size). As intended, the participants represented a wide spectrum of artistic work, geographical areas, and functional areas (i.e., marketing, education, executive). In subsequent phases of the project, participation will be open to all performing arts organizations across Canada.

Alan Brown and Surale Phillips of WolfBrown were engaged to assist the project partners with meeting design and facilitation. The focus of the two-day agenda was generating critical discussion on the five proposed field studies, with the aim of gaining clarity as to whether or how to move forward with each field study. This was accomplished through a series of small group breakout sessions. Moderators and scribes were pre-assigned to each group and reported out highlights to the large group on the second day, with time for Q&A. A summary of each of the five series of discussions and report-outs follows in the next section.

Introduction to the Five Field Studies

Prior to the Ottawa meeting, the host team identified five general areas for experimentation, subject to further reflection:

Field Study #1: **Experiments with Programming Frames** (i.e., organizing programs in strands or “frames” that resonate with the public)

Field Study #2: **Exploring New Affiliation Opportunities** (i.e., entering into non-transactional relationships in service of a higher purpose)

Field Study #3: **Building Affinity through Taste Communities** (i.e., curating, designing, and implementing specific educational programs to support and cultivate taste communities)

Field Study #4: **Trialing Membership Offers** (transactional or relational)

Field Study #5: **Relationships that reward and acknowledge “initiators”** - the people who organize cultural outings for their friends.

These “field studies” were extracted from a [new framework for loyalty](#) developed by WolfBrown for the National Arts Centre in 2023. While there are other levers in the loyalty framework, such as “Optimizing the Audience Experience,” the host team felt that these five topics were worthy of critical examination during the convening.



Critical Reflections on Five Potential Field Studies

Field Study 1: Experimenting with Programming Frames

1A. Proposition

An ever-smaller percentage of arts goers are able to select programs based on playwrights/ composers/ choreographers, repertory, and featured artists. Arts organizations that require a high level of background knowledge to navigate their program offerings are limiting the pool of prospects from which they can find ticket buyers. To serve a larger public, therefore, arts organizations should experiment with new approaches to conceptualizing programs in “frames.” Frames are defined as strands or threads of programming that promise an exploration of a theme, format, or aesthetic idea across performances and seasons. Organizations that participate in this field study will conceptualize, test, trial, or implement one or more programming frames. There is a significant body of existing practice from which to learn. For example, much of the most exciting branding work happening in the sector today is not at the institutional level but at the product level (e.g., branded series and formats). The litmus test for a “frame” is that the frame itself must be strong enough to sell tickets, irrespective of the specific titles/repertory on the program.

1B. Known Examples

- [Playlist Series](#) (NACO), a concert format developed by the NAC Orchestra
- [Pivot](#) – “New Adventures in the Performing Arts” (San Francisco Performances), a series of presented artists in unusual locations around San Francisco (i.e., a frame based on unusual venues/spaces)
- [Sensorium](#) (San Francisco Ballet), a Tuesday night branded format for young professionals
- [SoundBox](#) (San Francisco Symphony), a nontraditional space and format for small scale concerts
- [ESO Pairings](#) (Edmonton Symphony Orchestra), a short, no-intermission concert series pairing concerts with drinks (e.g., Guitar and Gin, Trumpet and Tequila)

- [Candlelight Concerts](#) (Fever), a presentation of a variety of performing arts genres and themes experienced in candlelit settings, currently taking place in more than 100 cities worldwide
- [Intimate & Immersive: The Five Senses](#) (Hamilton Philharmonic Orchestra), an intimate and relaxed general admission concert in a community space that explores the five senses
- [Museum of the Moon Concerts](#) (Saskatoon Symphony), concerts inspired and held under the giant touring moon installation artwork by Luke Jerram fusing science, public art, and music
- [Coffee Concert Series](#) (Shaw Festival), daytime lobby concerts performed by members of the Shaw Orchestra offering convenience and addressing barriers of nighttime driving
- [Happy Hour Concerts](#) (Orchestre Symphonique de Montréal), one-hour “after-work” concerts with musician mingling and cocktails, including an app-based listening guide

1C. Preliminary Theory of Change

By conceptualizing programming in frames and effectively marketing these programmatic frames, customers will express their affinity with the frames and choose to attend without necessarily knowing the specifics of the program. This offers customers more opportunities to connect with an organization’s program offerings, and sidesteps some of the difficulties associated with selling programs based on title/repertoire.

1D. Feedback on the Theory of Change

Support for the theory of change was mixed, although no refinements were offered. Generally, participants struggled a bit to fully understand the concept of programming frames. Moreover, the concept looks quite different to different kinds of organizations (e.g., orchestras vs. theatres vs. multi-disciplinary presenters). Some participants consider this field study as being valuable from an audience development perspective, particularly when the frame is a format (e.g., when a theatre offers select performances in a “relaxed format”). Others felt it would be less effective in attracting new audiences. Some feel the theory of change might be more clearly focused on programming frames as a means of attracting new audiences (which was always the intent).

1E. What Practices Might be Tested in a Field Study?

- Time-based frames: programming that offers alternative time formats such as “morning concerts with coffee,” or happy hour formats, or late-night formats

- Relaxed format frames: formats designed to lower accessibility obstacles, with different behavioral norms (e.g., permitted use of electronic devices, open seating, encouraging call-outs/verbalizing reactions to the artistic work)
- Educational frames (e.g., specific performances are selected for an intensive educational experience curated by the company)
- Thematic frames: programming built around relevant topics or ideas (e.g., a mystery theatre adult-only serial killer night with DJ and blood-themed cocktails, concerts themed on the cosmos)
- Immersive frames: program that extend sensory experiences or activate personal involvement (e.g., gamification, audience participation)
- Inter-disciplinary frames: partnering with other types of arts organizations to leverage the different affinity groups (such as music and visual art, or music and theatre, or mashups)
- Community format frames: programming that is paired with natural hubs for connection with others (e.g., coffee shops, pubs, swimming pools, social groups, back-yard pop ups)

1F. Implementation Considerations

- Emphasis was placed on the need for hypothesis-driven approaches to gain buy-in from artistic leaders and to ensure that frames make a direct connection to audience needs.
- Continuity and perseverance will be important to testing the success of the theory, if only because introducing audiences to programming frames will take time; thus, this can't be a series of short-term one-off experiments.
- A great deal of cross-site learning is possible.
- A good deal of the research will need to be done up front, before implementing specific frames (e.g., concept testing in qualitative discussions). This research can be a community activity (at least at the disciplinary level). For example, theatres or orchestras can collaborate on research to test interest in specific frames.
- There will be cost/operational feasibility considerations associated with all frames (e.g., cost, permit/location requirements (for off-site formats), labor implications)
- Considerable design/curation work will be required to bring some of the frames to life. For example, a group of orchestras might collaborate on designing a late-night meditation concert format.
- Some organizations have experience with frames already and are better resourced to continue the experiment. Others have more limited resources and no experience in this area. Thus, the community of practice will need to be designed so as to ensure broad participation.

1G. Potential Success Metrics

- Growth in new audience and retention of that audience
- Program continuity, year-over-year
- Word of mouth spread and social media metrics
- Community engagement levels

1H. Replication/Scale Potential and Likely Challenges

- Because this field study aims to build customer relationships around programming strands, it is directly tied to revenue outcomes.
- This field study attempts to address one of the most intractable problems facing the sector (i.e., marketing repertoire to people who don't know the pieces/titles).
- Learning could take place on several levels: 1) learning from past/existing experiments with programming frames; 2) rapid knowledge sharing (case studies) from self-initiated experiments (not coordinated with a cohort); 3) learning from cohort-based experiments in situations where identical frames are implemented across multiple sites (e.g., three orchestras implement an "After Dark" programming frame).
- Replicability could be a challenge for organizations of different sizes, locations, and types (e.g., intimate/large, urban/rural, traditional/non-traditional, etc.)
- While the range of implementation experiments under this field study is diffuse and, therefore, difficult to evaluate, the upside possibilities in terms of attracting new audiences are considerable.

Field Study 2: Leveraging New Affiliation Opportunities

2A. Proposition

This field study will interrogate different kinds of affiliation opportunities, their focus, purpose, and connection to mission, likely uptake, and how to sustain them over time. The actual affiliation concepts can range widely and might include groups that coalesce around accessibility (e.g., people who provide transportation to those who can't drive), docent groups, groups that get together to read through scripts of plays, affiliations framed as donor groups with a specific philanthropic focus, and other self-directed interest groups that might be managed through social media, etc.

2B. Known Examples

- A children's theatre company is working to establish a network of "neighborhood circles" - small groups of parents whose children are interested in theatre, to provide highly localized social support for theatre engagement
- [Club Cirque](#) (Cirque du Soleil), a free program ("Your all-access pass to all things Cirque du Soleil") that provides news and educational information to subscribers worldwide; essentially, it serves as a proprietary opt-in communications channel
- [Duets](#) (Gallo Center for the Arts) program, "...brings single, mature adults together to meet, mingle, and attend performances together"; participants are encouraged to bring friends who don't drive
- [MOPA Crew](#), a monthly membership of the Museum of Photographic Arts that enables people to join interest-based "crews" (i.e., Film Crew, Photography Crew) for a small monthly fee, and then participate in interest-based programs and activities
- [Yoga at Orchestra Hall](#) (Minnesota Orchestra), a community yoga series bringing together yoga enthusiasts with live music curated and performed by members of the Minnesota Orchestra; in this case, the value connection is around wellness and community.

2C. Preliminary Theory of Change

Given the opportunity, community members will choose to affiliate with an arts organization independent of their ticket-buying behavior, thereby diversifying connection points and deepening levels of loyalty.

2D. Feedback on the Theory of Change

Agreement was mixed. We know that many people are not “joiners,” but some are, and so finding the right pretexts for affiliation is the challenge. Those pretexts will vary from art form to art form and from community to community. Also, as every arts organization knows, it takes considerable staff time to manage affiliate groups. So, one of the questions here is if there are ways of structuring affiliate groups in a way such that they can be self-managed by the members. Smaller organizations and those with their own venues or with a good amount of control over their spaces were more supportive. It was even mentioned as critical to survival for those in very small towns. Larger organizations and those in more densely populated areas only expressed interest if the initiatives led directly to increased revenue. Some expressed the feeling that “affinity” lives within education or community engagement departments.

The theory maintained its non-monetary focus but evolved to emphasize the importance of intentional community building within a variety of definitions of what “community” means (e.g., geographic, subscriber, donor, artists). It was also stressed that metrics would need to be specific to what each field study participant was trying to accomplish with their experiment, not generic. The discussions highlighted the importance of this field study focusing on serving community needs rather than perpetuating old structures.

2E. What Practices Might be Tested in a Field Study?

- Interest-driven affinity groups, such as positive aging, newcomers/new residents, sing-along groups, spin bike groups, yoga enthusiasts, science-based interest groups (e.g., music and the cosmos)
- Third space activations, for organizations with the ability to carve out “hang out” spaces within their venue or adjacent buildings; the purpose here is to define alternative spaces that people can “affiliate” with – spaces that welcome and attract constituents whether or not they have a ticket to a show. This might involve repurposing a section of the lobby, or converting an adjacent space into a “performance lounge” where people can watch programs on video screens in a social environment; alternatively, the “third space” might be converted restaurant or artisan retail space in another location.
- Community-based affiliations: programming through which arts organizations make connections to civic causes or well-established community events (e.g., parades, pride festivities and other community celebrations, and fitness events such as marathons and races (e.g., [Beat Beethoven](#))); the strategy here is to establish a variety of pathways of affiliation that are not centered on the artistic work, but on personal interest (e.g., fitness).
- Lifestyle or lifestage-based affiliations: programming that meets the needs, expectations, and aspirations of specific cultural or lifestyle groups (e.g., young

professionals, LGBTQ+ groups, an affiliation program for caregivers of older adults (e.g., who might attend specific performances designated for multi-generational audiences); an affiliation group for expectant mothers interested to learn more about the benefits of arts-based play with very young children)

One of the challenges of this field study is isolating what differentiates an affiliation opportunity from a membership offer, a taste community, or just a clever community engagement program. For example, fans of Richard Wagner's Ring cycle would rightly be considered to be a taste community, and they very well might opt into paid educational activities. In situations like this where interest is very high and likely to be sustained over a long period of time, this affinity could be managed as an affiliation opportunity (e.g., an opera company invites people to "join The Valhalla Club"), which would be more of a membership offer with an educational focus. Thus, there are overlaps between these constructs, and this is the cause of some confusion.

The core idea with affiliation groups is that they are not designed or curated in the same way that artistic or educational programs would be curated but instead reflect the naturally occurring interests and core values of a group of community members who may or may not be able to attend live performances. Fundamentally, affiliation is manifested in the act of joining. In order to "join," participants will need to see a clear value in the group. In joining, they are fulfilling an important aspect of their identity.

2F. Implementation Considerations

- Affiliation opportunities allow people to act out their core values and interests, but in a way that connects to mission; when they are successful, these "opt-in groups" will be deeply fulfilling for participants, leading to positive feelings about the organization. Feelings of fulfillment, however, are likely to hinge on their level of engagement and quality of the experience.
- Defining what "communities" we are trying to gain affiliation with needs specificity and a defensible reason for the activity (e.g., is this what we are supposed to be doing?); for example, if a community of practice is formed around this field study, the community might select one or two very specific types of affiliations, and then see if there's enough interest to mount one or two multi-site implementation experiments.
- Some were concerned that these experiments in affiliation will not work if they are siloed in one department (e.g., development) within the organization.
- As discussed, there are difficulties differentiating between affiliation opportunities, membership offers, and taste communities. Rather than taking a methodological view, perhaps it will be better for arts groups to identify affinities or veins of value that might be leveraged to create new connections with

constituents and then consider how to activate them using any of the tools we're discussing in this report.

- Venue owners vs. renters will have different issues in terms of their and ability to activate affiliation groups.

2G. Potential Success Metrics

- Number of joiners
- Social media engagement and other indicators of interactivity between and amongst joiners
- "Show-up rate" at group activities
- Drop-out and retention rates (i.e., repeat opt-ins)
- Geographical diversity of joiners
- Social outcomes linked to KPIs around sense of belonging, loyalty, etc.

2H. Replication/Scale Potential and Likely Challenges

- There are questions about how and when to scale affiliation groups. There will be situations in which affiliation groups should be managed locally by one organization. And there will be situations in which affiliation groups might be managed regionally using a "franchise" model. And there will be situations in which affiliation groups might be managed nationally (e.g., <https://creativemornings.com/>) – when scale of involvement is not seen as a barrier, but an asset.
- Lack of staff capacity and resources to design, implement and track these programs will be a significant barrier to participation in this field study, although the amount of work can be reduced in the case of a "franchise" model where the design and implementation work is consolidated and coordinated across multiple organizations.
- An initial effort should be to understand the existing breadth of affiliation opportunities offered by arts and cultural organizations, and learn as much as possible about what works, and what doesn't. This early research could also help to advance a deeper understanding of the kinds of affiliations (i.e., lifestyle-based, education-based, etc.) and how they meet the needs of community members.
- Any new experiments within this field study should arise from the community of practice's research work, and will need to be quite focused on a particular type of affinity, allowing for parallel, multi-side experiments subject to structured documentation and evaluation.

Field Study 3: Building Affinity through Taste Communities

3A. Proposition

Research suggests that low-frequency and lapsed ticket buyers are just as hungry to learn more about the art as more frequent ticket buyers. This suggests an opportunity for arts organizations to create connection points with a larger pool of constituents by offering educational opportunities that don't require live attendance. These educational opportunities may or may not be organized around regular season programs and would be designed and offered to both those who can and cannot attend. Organizations that participate in this field study will curate, design, and implement specific educational programs designed to cultivate "taste communities" for some aspect of their artistic mission.

Taste communities are groups of people joined by a common passion, whether for music, film, fashion, or any number of human endeavors. They are both naturally occurring (e.g., fans of Shakespeare) and can be curated by an organization (e.g., a presenter who cultivates an interest in Latin Jazz). In fact, one might conceptualize an organization's audience as an intersecting portfolio of taste communities. This conceptualization recognizes the actuality of human nature: tastes are constantly changing, and the velocity of change has accelerated due to advances in technology; people move in and out of different taste communities over their lifetimes; taste is socially transmitted. Generally, however, the ways that most arts organizations engage with the public do not reflect these nuances. In fact, institutions (and sectors) were created 50 to 100 years ago based on narrow definitions of art that no longer matter so much to the general public.

We envision a time when arts organizations attach far more importance to the educational aspects of their missions and cultivate taste communities with the same level of care, quality, and intent with which they curate their artistic programs. We also see opportunities for broad-based cooperation across arts organizations on efforts to cultivate taste communities (e.g., a national program to build appreciation for contemporary dance or a taste community designed specifically around a tour by an important dance company).

3B. Known Examples

- [Dramawise](#) (Palm Beach Dramaworks), an educational and social series for adults that takes a deep dive into the season productions, with scripts, discussion with cast and artistic team, a luncheon, and PBD dramaguide
- [Talking Sondheim](#), a privately organized educational experience

- [Ballet 101](#) (formerly offered by San Francisco Ballet), a ballet appreciation course for adults
- [XSeries Program in Classical Work](#) (Harvard Univ.), a paid continuing education program consisting of five online courses about classical music over four months
- [Swing U](#) (Jazz at Lincoln Center), a collection of in-person and virtual classes on all things jazz
- [Where There's a Will: Finding Shakespeare](#) (Pushkin Industries and The Old Globe), a podcast about surprising places Shakespeare shows up outside the theatre

3C. Preliminary Theory of Change

Arts organizations can engage a larger circle of community members in their missions by offering adult education activities that are not exclusively tied to live performances but reflect “taste communities,” allowing providing community members with myriad opportunities to deepen their appreciation for the arts and to bond with organizations in different ways. These programs can be monetized through tuition, fees, and other underwriting.

3D. Feedback on the Theory of Change

There was a high level of agreement with this theory of change if the focus of developing taste communities is grounded in discovery or “taste acquisition,” therefore aligning with audience development goals. However, it is likely that many participants in taste communities will be knowledgeable art lovers who want to delve even more deeply into the art. Thus, the group identified another aspect of taste communities to evaluate – which is how to calibrate learning programs based on knowledge level (e.g., Opera for Dummies vs. seminars for lifelong opera lovers).

Participants were skeptical about the assumption that these activities can be monetized. Some see this area of practice more as a longer-term investment in building a sense of community and interconnectedness within the audience base. While frequent attendees are likely to enjoy participating in taste community activities, we note that the primary purpose of this initiative is to engage low-frequency and lapsed ticket buyers and other constituents who are unable to attend in-person for one reason or another.

A focus of the discussions around this field study was how to build “stickier” relationships, and how to reframe “education” as “learning” through experiential, discovery-based approaches that make and maintain personally meaningful connections.

3E. What Practices Might be Tested in a Field Study?

In discussing potential multi-site experiments, participants wrestled with the definition of a “taste community” and suggested a very wide range of programs and activities. For example, one organization cited its showtunes-themed Zumba class as an example of a taste community. Others referred to backstage tours, film clubs, Star Wars fan clubs, acting classes, cosplay events and instrument petting zoos. Reflecting on the notes from the breakout sessions, it is clear that a more focused definition of “taste communities” is needed, as every sort of education or community engagement activity is not necessarily a taste community.

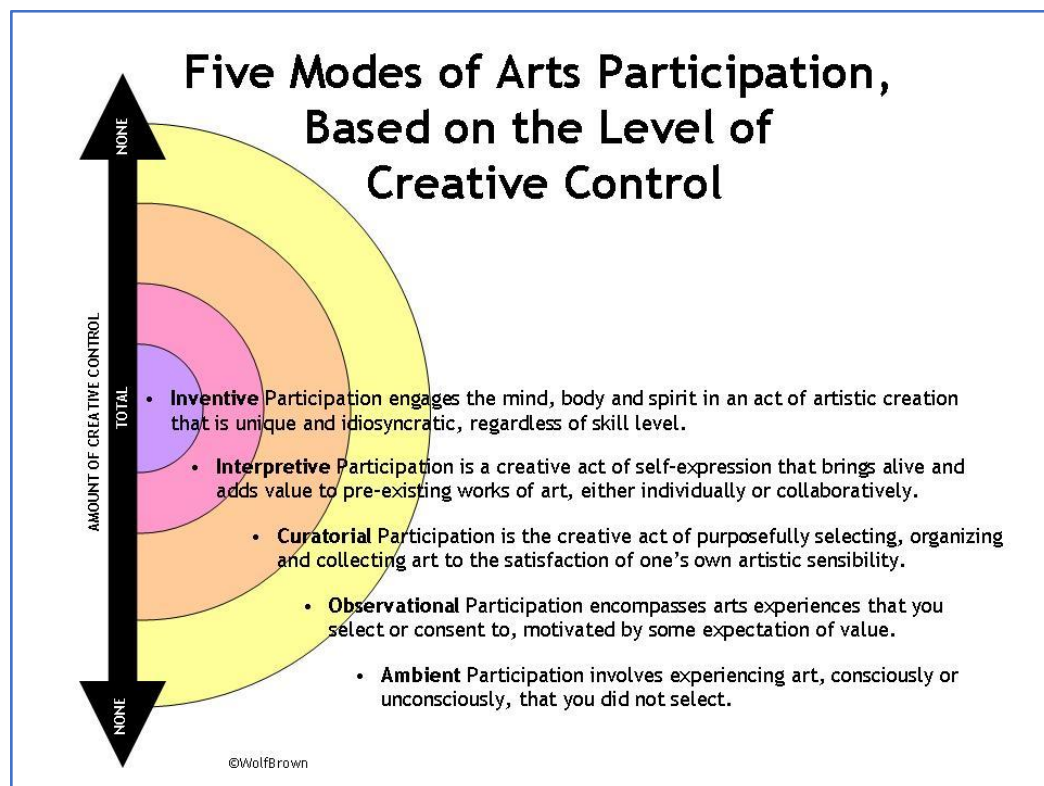
What, then, distinguishes a taste community? As the name suggests, a “taste community” should serve to cultivate, awaken, or hone participants’ tastes in art. **They are specifically intended to do the work of taste acquisition and preference discovery**, with the caveat that not everyone loves every kind of art, and people’s tastes are defined as much by what they don’t like, as by what they like. So, when someone joins a taste community, they may decide it’s not for them, and this should be viewed as a legitimate and even desirable outcome. We want to encourage people to explore the outer boundaries of their tastes, and accept that everyone has their own boundaries, and that those boundaries can move over the course of a lifetime. We want people to “own their tastes” and not feel diminished or delegitimized if their tastes don’t always align with those of others. This should be the explicit moral backdrop to working with taste communities for organizations committed to equity.

Using the input from Ottawa participants as a starting point, we suggest several categories of tastes communities:

1. **Aesthetically-defined taste communities** focus on cultivating a love for some aspect of an organization’s artistic work. These might be defined in terms of styles or genres of art, periods or eras of artistic work, specific creators (playwrights, composers, choreographers, etc.), instruments or techniques, or specific works of art. Generally, these taste communities will be time-limited and framed as learning opportunities to deepen one’s appreciation of an art form. In some cases, organizations will want to link these tastes communities to some aspect of their season. Many of these taste communities can be replicated across similar organizations. In some cases, organizations with very focused strands of artistic work, such as NAC’s [Indigenous Theatre](#) series, have, in essence, already created a taste community, although they may not conceptualize it as such.
2. **Production-related taste communities** shed light on the artistic process and what happens backstage, thereby building appreciation for the work on stage. This might include seminars on costume design, theatrical lighting workshops, or stage management, and communities designed around supporting new artistic

work (e.g., groups that gather to read through new scripts submitted by young playwrights).

3. **Artist fan clubs** allow community members to follow the work of specific artists beyond their local appearances. In many cases, artists maintain their own social media accounts and it is not necessary for a producer or presenter to maintain a fan club or listserv. However, there is much more that arts organizations can do to support and sustain interest in specific artists sparked by local presentations. This is one area ripe for collaboration across many organizations (e.g., a consortium of presenters supports a portfolio of interest groups, each focused on a different choreographer or dance company). While all fan clubs do not function as taste communities, there are ways that fan clubs can be managed so as to build appreciation for artists' work and allow people to follow their careers over many years.
4. **Active participation programs that foster aesthetic appreciation** – here, programs might draw from any of the three active modalities of participation, including inventive, interpretive, and curatorial (see “Five Modes of Arts Participation” diagram, below). Generally, these will be studio classes and workshops involving active singing, dancing, acting, etc. (e.g., [San Francisco Ballet's adult ballet classes](#)). To qualify as a taste community, the instructional activities should go beyond mere fitness or recreation and include basic instruction on technique, history, etc., so as to deepen appreciation for the artistic form.



3F. Implementation Considerations

- Implementing taste communities represents one of the few ways of engaging infrequent, lapsed, and non-attenders in mission-driven activity. They should be understood as inherently worthwhile activities, even if they don't result in increased attendance at live events. Remember that the purpose here is to allow organizations to build relationships with people who can't, or won't come to live performances. This begins to shift the organizational paradigm from that of a producer or presenter of live events to that of a trusted guide through the world of art.
- Organizations should think in terms of curating their taste communities as carefully as they curate their artistic seasons. In many cases, taste communities can be linked to live presentations or productions.
- A critical assumption to test is what constituents will be willing to pay for these experiences. Different cost models should be explored, including paid vs. free, cost-burden, charitable mandate, and for-profit models. Tuition waivers might be offered to those who need it.
- Another design issue is how to think about in-person vs. virtual activities. For those who rent their spaces, there are also issues of location for in-person activities. Given the priority here is to engage people who generally can't, or won't attend live events (some of whom live out-of-area), it seems that at least some activities should be virtual, although it is generally recognized that in-person activities can result in deeper social impact.
- There is also the question of faculty. Who will lead the various sessions, and how much should they be paid? In some situations, it might be possible for a staff person, such as the artistic director or an education director, to lead some activities, which would serve to deepen connections with the organization. There is also the ever-present issue of limited staff capacity, which raises the question of how taste communities can be designed so as to minimize the level of staff effort.

3G. Potential Success Metrics

- Enrollment/participation rates
- Post-experience satisfaction ratings
- Re-enrollment rates
- Growing sense of bond or affinity with the organization

3H. Replication/Scale Potential and Likely Challenges

- There are excellent opportunities for replicable experiments. For example, a taste community could be designed around a national tour of an important dance

company or theatre production, and implemented asynchronously in numerous communities as the tour progresses. Or, a consortium of orchestras could collaborate on a taste community design that spotlights a different instrument each year, with the goal of expanding tastes for different instruments. Or, they might collaborate on a taste community keyed on the anniversary of the premiere of a specific orchestral work. The range of potential taste community activities is almost limitless and very much needs to be carefully curated.

- Most likely, it will take some time and effort to identify multi-site experiments to implement. Concepts will arise from conversations between and amongst members of the community of practice. Thus, the first step towards this field study will be to constitute a community of interested individuals, and facilitate an ideation process with the goal of identifying taste communities that are well suited for multi-site experiments.
- There are many questions about pedagogy that can be a focus of the experiment designs. How many sessions? Over what period of time? What learning and teaching approaches will be used? How will participants interact with each other? Formative research and concept testing can play a role in helping to shape these offerings.
- Organizations' interests in taste communities will naturally relate to their artistic output. Multi-disciplinary presenters will have broader interests, while orchestras and theatre companies will have more focused interests. Because of this, it might be better to organize this field study – at least initially – in disciplinary silos, with the field study's facilitator keeping the macro view across disciplines and ensuring that important learnings transfer across disciplinary lines.

Field Study 4: Trialing Membership Offers

4A. Proposition

A growing number of performing arts organizations are experimenting with various types of membership programs. Some of these programs are specifically geared toward young adults (under 35s), while others are essentially subscriptions on a monthly payment plan. Yet others attempt to blur the line between ticket bundles and relational memberships. Some might look at memberships through the lens of small gifts and might think about converting small gift programs into a baseline membership program with an educational focus. This field study will explore the range of options for membership programs, the extent to which they are transactional vs. relational, how they create value for members, and the degree to which they cultivate loyalty. Participating organizations will pilot test at least one membership program during the first phase of the study.

4B. Known Examples

- [**ZACH XP**](#) (Zach Theatre’s “Zach Experience Membership”), for a flat monthly rate of \$39, members can reserve tickets to all shows and events at no additional cost; members get first access to tickets, complimentary parking, exclusive discounts at the bar, and invitations to members-only events
- [**Recurring Concert Membership**](#) (St. Paul Chamber Orchestra) offers several monthly membership options that range in price between \$5 and \$20 a month; members gain unlimited access to concert tickets, subject to certain conditions, and can redeem/reserve tickets online
- [**Teen Scene**](#) (Ensemble Theatre Cincinnati), is a fix-fee program targeting teens that allows them to attend live theatre and the chance to learn more about the theatre-making process
- [**Ambassador Society**](#) (Phoenix Theatre Company) a fixed-fee membership for under 40s that offers a free ticket to each of the company’s shows and access to social events and VIP receptions
- [**General Membership**](#) (Stratford Festival), a multi-tiered, philanthropic membership that allows members to donate on either a monthly or annual basis and get access to year-round benefits
- [**Shaw Guild**](#) (Shaw Festival), a low-cost membership (\$20) that offers volunteer training for a variety of activities and exclusive events
- [**ESO Monthly Membership**](#) (Edmonton Symphony Orchestra), a membership program framed as an all-access pass with \$10 tickets and exclusive benefits; the program is positioned as a lifestyle choice vis-à-vis fixed subscriptions: “Do you like to plan ahead? Then, subscription is for you. Do you like to leave your options open? Then, membership is for you.”

4C. Preliminary Theory of Change

People will join/associate/affiliate with arts organizations through membership programs independent of their attendance frequency if relevant and affordable opportunities are provided.

4D. Feedback on the Theory of Change

There was general agreement with this theory of change and support for a field study in this area. Some organizations with subscription models, however, questioned the need for an additional membership program. Based on the discussion, it is not yet clear to many people how subscription models and membership models can “sit together” and see membership offers as cannibalizing subscriptions. Others identified problems with the word “affordable” being a relative term and an equity issue (if memberships are paid programs). Some suggested that the phrase “independent of their attendance frequency” was unnecessary to the core theory.

Participants tended to embrace a definition of membership that is non-transactional (i.e., not tied to ticket purchase or discount), which runs counter to the ways that most museums use memberships. In fact, most of the experimentation with memberships happening now in the performing arts sector is tied to ticket incentives, and therefore transactional. For the purposes of analysis, therefore, it will be helpful to approach this field study with a two-part definition of membership: 1) customer relationships forged around a reciprocal value proposition that is linked to mission but not ticket purchase (i.e., “non-transactional relationships”); and 2) customer relationships designed around ticket packages, bundles or discounts – some of which attempt to add a relational element to an otherwise transactional relationship.

4E. What Practices Might be Tested in a Field Study?

Non-Transactional Member Relationships

- Opt-in organizational memberships: low-threshold or free membership programs, whereby as many people as possible opt-in to a baseline, mission-driven membership program that allows an organization to communicate with a large constituency apart from its sales messages; for example, an organization might auto-enroll all ticket buyers into a baseline membership program, and also welcome community members (non-buyers) to join for a nominal fee. These might be auto-renewal memberships, a model familiar to many consumers, which automatically renews until the individual opts out. Note that some museums offer a ‘[starter membership](#)’ for free.
- Prestige memberships: social/experiential perks-based membership models that offer exclusive members-only events and gatherings, early ticket access/entry access, VIP areas, etc. This is commonly implemented in the context of

hierarchical donor rewards/benefit programs. These programs can also create perceptions of exclusivity and privilege that run counter to DEI goals.

- Artist memberships: memberships that support and attract artists and creatives and provide a social support structure for them (e.g., a membership program for recent graduates of music, dance, or theatre training programs)
- Brand ambassador memberships: high-touch membership programs intended for social influencers to cultivate exposure and positive word-of-mouth (also see Supporting Initiators, below)

Transactional Member Relationships (tied to ticket purchase/attendance)

- Flat-rate membership: membership models that allow unlimited access to ticketed programs, subject to certain conditions
- Community memberships: geographic memberships/discounted ticket programs that offer more affordable access to local residents of a given community (esp. in situations where an organization receives municipal funding)
- Rewards-based membership programs: loyalty initiatives whereby members accrue rewards based on attendance (akin to frequent flyer programs)
- Flexible-payment memberships: subscriptions on a payment plan
- Trial memberships: membership programs intended to lower cost barriers for teens, young adults or other difficult-to-reach audience segments, some of which also involve social activities (e.g., Under 35 membership programs)

Of course, this is a very preliminary taxonomy of types of memberships and further research should be done to evolve and improve the taxonomy in order to bring a stronger theoretical framework to this confusing area of practice.

4F. Implementation Considerations

- While museums have been engaging the public through memberships for many years, the idea of memberships has yet to take hold in the performing arts sector, although a good deal of experimentation is underway. Unlike some of the other types of customer relationships being examined in the other field studies, the public is generally quite familiar with the idea of memberships. However, organizations are appropriating the term “membership” to refer to many different kinds of transactional and non-transactional relationships, which will only continue to confuse the marketplace.
- In practice, some membership programs might be indistinguishable from donor engagement programs, and are a hybrid of transactional and non-transactional designs. Other membership programs are conflated with subscription. Therefore, sorting out donor and subscription programs with membership programs could be a helpful focus for this field study (e.g., would it be more productive to convert small gift programs into membership programs?). In any case, given the focus of

the RCR initiative on activating low-frequency and lapsed ticket buyers, the focus here should hew towards non-transactional memberships.

- Learning how to communicate with constituents when not “selling” is seen as a core, underdeveloped capacity in most arts organizations. Memberships provide a context for interacting with constituents – both ticket buyers and non-buyers – about a range of mission-related topics, not just what’s on sale.
- There are interesting questions about use of digital media platforms such as YouTube, Discord and WhatsApp as vehicles for engaging members. Can some membership programs be managed principally through social media and other digital platforms? And, there is the ever-present constraint of limited staff capacity. Are there ways of designing memberships that minimize the required level of staff support?
- Some expressed concerns about over-soliciting patrons, leading to donor fatigue, but the focus here should be on engaging low-frequency and lapsed patrons in membership programs, not existing donors.

4G. Potential Success Metrics

- Number of members enrolled
- Members bringing non-members into groups
- Renewals into membership programs
- Feeling of belonging/welcome, reasons for support/participation
- Member advocate numbers (mobilization to reaffirm the importance of arts and culture)

4H. Replication/Scale Potential and Likely Challenges

- The level of interest in this field study is high. Organizations may be compelled to participate as a way of exploring new revenue streams, strengthening community relationships, and enhancing audience loyalty. Membership models offer the potential for better patron retention through non-sales engagement and ticketing flexibility.
- As with several of the other field studies, the challenge with this field study is the wide array of membership programs that might be tested and building support for specific experiments that can be replicated across multiple sites. For example, three or four organizations might co-design and pilot test a membership program for local artists. Experiments should be prioritized if they are scalable across organizations of different sizes and in different kinds of communities and if they focus on a particular constituency, such as artists, seniors, or young adults.
- Therefore, much of the value of this field study will lie in continued research and dissemination of good practices, and continued theoretical work to describe the principles of reciprocity and value that make memberships successful.

Field Study 5: Supporting Initiators

5A. Proposition

Between 15% and 20% of ticket buyers self-identify as “the kind of person who organizes outings to cultural events for my friends.” We have a great deal of research data about these people: they tend to be a bit younger, on average, more socially connected, more aware of the cultural landscape in their community, more active on social media, etc. They do our marketing work for us, yet we don’t know who they are. There are interesting questions about how to identify them, how to support them, and what would motivate them as they derive intrinsic rewards from the process of putting groups together. Would they enjoy personalized sales/service? Would they like access to pre-/post-educational activities for their group? Would they respond to “bonus” tickets or credits for free tickets when they reach certain thresholds? Should we treat them like docents and train them on our program offerings? This study will explore different approaches to supporting Initiators.

5B. Known Examples

- [DICE App](#) is an event discovery and ticket-buying app that also provides users multiple ways to easily share events with their friends and create groups within the app where friends can vote on shows they might want to attend together.
- [ClassicCard App](#) is a social app that allows Berlin arts institutions to reach younger audiences and promotes socializing in small groups through various in-app features.
- There are examples of arts organizations that occasionally provide subscribers with an extra pair of tickets so they can invite someone who doesn’t usually come.
- We have heard of incentives to increase party size (e.g., re-marketing to existing ticket holders with a discount offer to bring additional people).

5C. Preliminary Theory of Change

Social Initiators can be identified and supported, resulting in stronger feelings of loyalty and more frequent attendance with friends in tow.

5D. Feedback on the Theory of Change

There was overall agreement with the theory of change and very strong support for this field study, principally because of the direct connection to strengthening revenue outcomes.

5E. What Practices Might be Tested in a Field Study?

- Discussion centered around a multi-step process: 1) experimenting with ways of identifying initiators, such that individuals who fit the profile of an initiator step forward, self-identify as an initiator, and agree to participate in a program designed for them and others like them; for example individuals in the patron database who've previously purchased four or more tickets to a single performance might be approached with a non-anonymous survey designed to identify initiators; this process should recognize that the person buying the tickets might not necessarily be the initiator; 2) conducting research on self-identified initiators to better understand their motivations and initiating behaviors, and the extent to which there are different typologies of initiators (e.g., super-fans, nurturers, ring leaders of established social groups); 3) experimenting with different models for supporting for them and rewarding them, through multi-site pilot programs; and 4) figuring out how to sustain relationships with the people they bring to performances; for example the 'friends' who come with initiators might be offered a free membership or might be encouraged to join a taste community.
- There are likely to be technological solutions to managing initiator relationships, which should be thoroughly researched and debated, such as apps and ticketing functionalities that support group sales.
- As far as strategies for supporting initiators, many possibilities were discussed, including a special concierge service, access to great seats, privileges for holding seats for a finite window of time while they assemble a group, rewards programs, recognition programs, educational benefits, etc.
- Hence, there's a logical, step-wise sequence to this field study involving research, technological solutions, and pilot testing a range of approaches to engaging and supporting initiators, all of which will need to be approached methodically.
- There will always be a risk here of arts organizations being perceived as exploiting audience members for access to their personal friends. This sensitivity should be front of mind in all designs. Ensuring that participating initiators derive real value from the program will help to avoid this problem.

5F. Implementation Considerations

- This field study aims to activate demand indirectly by supporting people who invite friends – most of whom otherwise wouldn't attend without the social invitation.
- It is not necessary to attempt to comprehensively identify all the initiators in an organization's database right away. In fact, only a small number of initiators are needed to conduct research and pilot test support programs. Risk can be mitigated by keeping the initial experiments small-scale.

- Eventually, any program to support initiators will require new ticketing/database procedures that allow for initiating behavior to be tracked through account numbers, discount codes, etc. What is the lifetime value of an initiator versus a subscriber?

5G. Potential Success Metrics

- Number of initiators
- Frequency of attendance in initiator groups
- Growth in group size
- Longevity of relationships
- Qualitative feedback from initiators and their group members
- Shadow buyer returns

5H. Replication/Scale Potential and Likely Challenges

- One of the favorable conditions supporting this field study is that it is potentially relevant to all arts organizations with patron databases since initiating behavior is a naturally occurring social phenomenon amongst all arts attendees, regardless of age, geography, artistic discipline, etc. The potential for replication of successful practices, therefore, is very high.
- Multi-site experiments could be organized around different incentives and rewards such as access to good seats, enhanced customer service, social benefits, educational benefits, ticket discounts, rewards, recognition, etc.



Thoughts on Next Steps

Overall Initiative Design

As stated earlier, the overall purpose of the Reimagining Customer Relationships project is to build a new “system of R&D” for designing, testing, and refining promising new practices in building stronger customer relationships – new points of connection, new affiliations, new affinities – and then accelerating the adoption of good practices field-wide. The focus is on developing *replicable* strategies that deepen loyalty and cultivate affinity among *infrequent* or *occasional* audiences, and attracting new audiences. Thus, the desired outcome of the RCR initiative is *adoption of new and better practices* in building customer relationships. It might be framed, therefore, as an “accelerator” program built on a foundation of R&D.

The initiative’s core principles should be carefully articulated, so that all may understand how this is not business as usual, such as:

- A collective action model, organized as a portfolio of self-governing, facilitated communities of practice
- Priority is given to multi-site research and testing
- Full transparency of research and evaluation so that learnings are immediately available to the entire sector
- Broadening public participation in the arts in ways that strengthen the business models of arts organizations

We think the initiative is well situated under the collective umbrellas of the national service organizations, whose missions are concerned with the artistic health and financial sustainability of the sectors under their purviews and who have the ability to reach deeply into the sector through their respective communications and convenings. The logic for inter-disciplinary R&D work is strong. Other partners with a stake in sector sustainability may be brought into the project, especially those who might assist with research, evaluation, facilitation, and knowledge sharing.

Coordinating the project will require a good deal of staff time and/or administrative support from a contractor. How the service organizations choose to administer the initiative is up to them. It is not difficult to foresee a time when this initiative could grow to include a support staff of several people, with additional support from a small coterie of researchers and facilitators. However, it should be designed to function at a baseline level with only minimal resources and then allowed to grow as resources are secured.

Funding should be sought to underwrite the initiative's various programs, but only if the funding is free from restrictions on knowledge-sharing. It is likely that some individual organizations will seek proprietary funding to underwrite their own organization's costs of participating in RCR activities. This should be discouraged, as it will create an environment of winners and losers, which is antithetical to the whole initiative. When funding can support multi-site research and multi-site experiments, however, it should be welcomed, even if those experiments might be limited to a specific geographical area.

In terms of timeline, arts organizations have been working to strengthen customer relationships for many years, and these efforts are likely to continue in perpetuity. The initiative doesn't need to last forever, but thinking about the program should be long-term, not short-term.

Thoughts on Organizing the Individual Field Studies

Field Study #1: **Experiments with Programming Frames** (i.e., organizing programs in strands or "frames" that resonate with the public)

- An initial effort would involve establishing a national community of practice with a communications backbone (e.g., a listserv, a webpage describing the community's purpose and aims), and establishing a basic level of facilitation and a leadership structure.
- This field study will be of primary interest to artistic directors and other staff with purview over core programming decisions. Marketing directors will also have a keen interest in this field study, as effective use of programming frames could be a boon to marketing. However, the artistic directors will need to be in the driver's seat on this field study, and not all of them will see the value. Thus, the size of this community might be more limited.
- An initial focus of activity would be crowd-sourcing examples of programming frames and cataloging these examples on a series of webpages that are publicly available. Periodic videoconferences might be scheduled to share out learnings or update members on community activities.
- Within the community of practice there might be discipline-specific working groups (e.g., orchestras, theatres) that are charged with identifying and prioritizing specific frames for research and testing. For example, several orchestras in the US are currently conducting research on programming frames and might be willing to share some or all of their research with the orchestra sub-group. Similarly, some theatres have been developing branded formats and may be willing to share their results with the theatre sub-group.

- At such time as a consortium of community members proposes a multi-site pilot test of a programming frame, the program managers will then need to decide if there are sufficient resources to support it through research and evaluation.
- Individual organizations might implement programming frames on their own initiative and timeline, and then report results back to the community. Such single-site experiments, however, would not be supported with community resources.

Field Study #2: **Exploring New Affiliation Opportunities** (i.e., entering into non-transactional relationships, in service of a higher purpose)

- We suggest consolidating Field Study #2, “Exploring New Affiliation Opportunities” with Field Study #4, “Trialing Membership Offers,” since there’s so much ambiguity and confusion stemming from the conceptual overlap. By definition, all membership programs are affiliations (characterized by the “act of joining,” though not all affiliations are framed as memberships. The consolidated field study might be titled “Memberships, Affiliations, and Interest Groups” the common thread being opportunities to associate or “get involved” with the organization.

Field Study #3: **Building Affinity through Taste Communities** (i.e., curating, designing, and implementing specific educational programs to support and cultivate taste communities)

- An initial effort would involve establishing a national community of practice with a communications backbone (e.g., a listserv, a webpage describing the community’s purpose and aims) and establishing a basic level of facilitation and a leadership structure.
- This field study may be of interest to a broad cross-section of managers, including education directors, programming directors, and development managers (as some taste communities will double as donor cultivation programs).
- An initial focus of activity would be crowd-sourcing examples of taste communities and cataloging these examples on a series of webpages that are publicly available. Periodic videoconferences might be scheduled to share out learnings or update members on community activities.
- Within the community of practice, there might be discipline-specific working groups (e.g., orchestras, theatres, dance presenters) that are charged with identifying and prioritizing specific taste communities for design and pilot testing.
- An initial focus should be identifying a small number of scalable taste communities that can be implemented across an array of organizations. The program managers will then decide if there are sufficient resources to support one or more multi-site pilot programs through research and evaluation.

- Individual organizations might implement taste communities on their own initiative and timeline and then report results back to the community. Such single-site experiments, however, would not be supported with community resources.

Field Study #4: **Trialing Membership Offers** (transactional or relational)

- This is likely to be a high-interest community of practice, given the direct connection to revenues. It is also ideally suited to well-structured, multi-site experiments testing various membership pricing structures, group activities, incentives, etc.
- An initial effort would involve establishing a national community of practice with a communications backbone (e.g., a listserv, a webpage describing the community's purpose and aims) and establishing a basic level of facilitation and a leadership structure.
- This field study will be of interest to both marketing and development managers.
- An initial focus of activity would be crowd-sourcing examples of memberships and cataloging these examples on a series of webpages that are publicly available. Periodic videoconferences might be scheduled to share out learnings or update members on community activities.
- Within the community of practice, there might be discipline-specific working groups (e.g., orchestras, theatres, dance presenters) that are charged with identifying and prioritizing specific membership offers for design and pilot testing.
- An initial focus should be identifying a small number of membership offers that can be implemented across multiple sites. The program managers will then decide if there are sufficient resources to support one or more multi-site pilot programs through research and evaluation.
- There will be a significant need for both qualitative and quantitative research on the front end – research to test overall interest in candidate membership offers amongst target segments, research to assess branding options, research to test the salience of member benefits, price points, etc. In fact, this community of practice would benefit a great deal from a “tool box” of research methods that can be used to assess membership offers before they are rolled out.
- After they are rolled out, the membership offers can be evaluated through a combination of performance metrics and evaluative research.
- Individual organizations might implement membership offers on their own initiative and timeline and then report results back to the community. Such single-site experiments, however, would not be supported with community resources.

Field Study #5: **Relationships that reward and acknowledge “initiators”** - the people who organize cultural outings for their friends.

- This is also likely to be a high-interest community of practice, given the linkage to ticket sales. This field study is also well-suited for multi-site experiments testing various specific designs for supporting initiators.
- An initial effort would involve establishing a national community of practice with a communications backbone (e.g., a listserv, a webpage describing the community’s purpose and aims) and establishing a basic level of facilitation and a leadership structure.
- This field study will be of interest primarily to marketing managers.
- An initial focus of activity would be crowd-sourcing examples of initiator-like programs that might be culled from group sales practices and direct selling programs or influencer programs. These reference points should be catalogued on a series of webpages that are publicly available. Periodic videoconferences might be scheduled to share out learnings or update members on community activities.
- There is no need for disciplinary interest groups for this field study – the initiator support programs to be developed will be applicable across disciplines.
- An initial focus should be identifying an overall, systematic approach to designing and testing initiator support programs. The program managers will then decide what resources are available to progress through the design and testing work.
- There will a need for up-front research to better understand initiators, what motivates them, and what incentives will motivate them. For example, a panel methodology might be used that involves recruiting a small group of initiators from the databases of several different organizations, and then convening them repeatedly through online focus groups and other methods to provide feedback on a range of initiator support programs. This research should precede any pilot testing of specific programs.
- As they roll out, multi-site pilot tests of initiator programs can be evaluated through a combination of performance metrics and evaluative research.
- Individual organizations might implement initiator programs on their own initiative and timeline and then report results back to the community. Such single-site experiments, however, would not be supported with community resources.

Appendices

Detailed Agenda for Ottawa Gathering

Day 1: Wednesday, Nov. 13, 2024

Rossy Pavilion, National Arts Centre, 1 Elgin Street
8:15 Breakfast (provided)

9:00 Welcome, land acknowledgment, and project overview (Shannon Urie, Katherine Carleton, Frédéric Julien, Brad Lepp)

9:15 Opening Plenary: In conversation with David Maggs, Metcalf Fellow on Arts and Society.

David Maggs will offer thoughts on invention, innovation, and the need for research and development in the arts sector.

9:45 Questions and Comments for David Maggs

10:00 Participant Reflections on Successes and Challenges with Audiences, Post-Pandemic

To build a shared understanding of the current conditions facing arts organizations in Canada, participants will be invited to share their perspectives on: 1) challenges with attracting and retaining audiences; 2) success stories with approaches to forging and strengthening relationships with customers. Please keep your comments to 2 or 3 minutes, so we can hear from as many people as possible.

11:00 Break

11:15 Set-up of Breakout Group Work

All participants will rotate through five small group discussions, each focusing on one of the five areas of experimentation, identifying issues and opportunities for evolving organizational practice. A facilitator and a scribe will stay with each topic in order to capture the discussion highlight across all five rotations, while everyone else will rotate through all five topics. Refer to the one-page Orientation sheets for each topic. Alan will briefly talk through each of the five areas and the framing questions to guide discussion in the breakout groups. Room assignments are as follows:

- Field Study 1 (Rossy Pavilion Front): Experimenting with Programming Frames
- Field Study 2 (Rossy Pavilion Back): Leveraging New Affiliation Opportunities
- Field Study 3 (Lantern Room Front): Building Affinity through Taste Communities
- Field Study 4 (Lantern Room Back): Trialing Membership Offers
- Field Study 5 (Southam Balcony Foyer): Supporting Initiators

11:45 Rotation #1 (45 minutes)

12:30 Lunch, Rossy Pavilion (provided)

1:30 Rotation #2 (40 minutes)

2:10 Break to move to next discussion topic (10 minutes)

2:20 Rotation #3 (40 minutes)

3:00 Break to move to the next discussion topic (10 minutes)

3:10 Rotation #4 (40 minutes)

3:50 Break to move to the next discussion topic (10 minutes)

4:00 Rotation #5 (40 minutes)

4:40 Break to return to the Rossy Pavilion (5 minutes)

4:45 Quick Debrief and Selection of Small Groups for Tomorrow

Based on your experience of the day, we'll ask everyone to identify a first choice and a second choice for tomorrow's small group discussions, to finalize thinking on one topic area and prepare for the large-group report-back..

5:15 Wrap up

5:30 Optional social activities

Day 2: Thursday, Nov. 14, 2024

8:15 Breakfast (provided), Rossy Pavilion, National Arts Centre, 1 Elgin Street

9:00 Five concurrent small group discussions will occur (2 in Rossy Pavilion, 2 in the Lantern Room, 1 in Southam Hall foyer) to bring more definition to the five field studies. (A facilitator will be assigned to each group.)

- Has your thinking about the theory of change evolved? How so?
- What kind of projects/experiments, specifically, have been suggested that would address the theory of change? What other experiments might be incorporated into the field study, if participants can be found?
- What background research might be gathered prior to starting?
- Do you have any ideas about how to measure success?
- How might the field study be structured so as to benefit the maximum number of organizations across Canada?

10:15 Break

10:30 Report out: Field Study #1-Experiments with Programming Frames
Q&A/Discussion

11:00 Report out: Field Study #2-Exploring New Affiliation Opportunities
Q&A/Discussion

11:30 Report out: Field Study #3-Building Affinity through Taste Communities
Q&A/Discussion

12:00 Lunch (provided), Rossy Pavilion

12:50 Group Photo - Staircase

1:00 Report out: Field Study #4-Trialing Membership Offers
Q&A/Discussion

1:30 Report out: Field Study #5-Supporting Initiators
Q&A/Discussion

2:00 Break

2:15 Reflections and Next Steps

3:00 Wrap-Up



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