

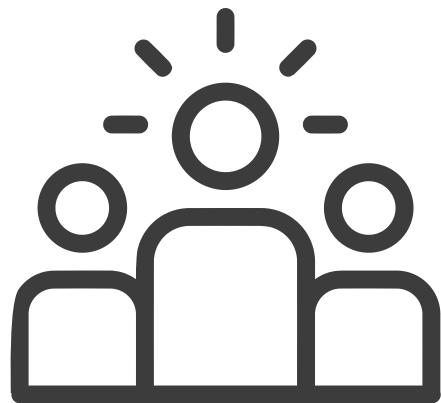


RE-IMAGINING  
CUSTOMER  
RELATIONSHIPS



2025/2026

# SUPPORTING INITIATORS



A guide for performing arts organizations to support the identification and engagement of initiators throughout the purchasing and coordination processes.





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# ABOUT THE RCR PROJECT

Performing arts organizations around the world are struggling to achieve sustainability in a changing market. In Canada, these challenges include evolving audience behaviours, modes of engagement, and purchasing trends.

In November 2024, Orchestras Canada (OC), the Professional Association of Canadian Theatres (PACT), the National Arts Centre (NAC) and the Canadian Association of Arts Organizations (CAPACOA) brought together representatives from the performing arts community across the country to explore innovative approaches to foster audience loyalty. This meeting marked the launch of the [Re-imagining Customer Relationships](#) (RCR) project — a collaborative initiative aimed at strengthening the resilience and trustworthiness of Canadian publics in the post-COVID era.

Structured as a national, open, and multi-year research initiative, the project is supported by a graduate-level university program affiliated with HEC Montréal and builds on [recent work by WolfBrown and David Maggs \(George Cedric Metcalf Foundation\)](#). The project's strategies are examined through a series of field studies, the first of which is *Supporting Initiators*.

## Partners and Collaborators

- Orchestras Canada
- Professional Association of Canadian Theatres
- Canadian Association for the Performing Arts
- HEC Montréal
- National Arts Centre
- WolfBrown
- Association for Opera in Canada

## Funders

- The Government of Canada
- Metcalf Foundation
- Azrieli Foundation
- The Chawkers Foundation

# SUPPORTING INITIATORS

## A GUIDE FOR CULTURAL ORGANIZATIONS

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### INTRODUCTION

The field study, *Supporting Initiators*, was launched in February 2025 and focuses on an important but often overlooked figure in the arts community, whose role is essential for organizations: the cultural initiator. The key objectives of this study are to:

- Understand how performing arts organizations identify and engage initiators.
- Explore the motivations and goals of cultural outing organizers.
- Identify challenges and opportunities in building relationships with initiators.
- Develop strategies to enhance initiator engagement, strengthening their loyalty and that of their networks.

The study consists of two phases. The first took place in the summer of 2025 and consisted of semi-structured interviews with five managers and ten initiators. The second phase is an iterative study that involves using this guide to put our recommendations into practice in the field and working closely with participating organizations to collaboratively develop the strategies to be implemented.

Through this guide, we hope to translate the findings of the first phase of research into concrete courses of action that performing arts organizations can test out. The goal is to help managers recognize and support these initiators, building their loyalty to strengthen customer relationships and encourage collective participation. This document was designed to be an evolving tool and will be tested in the field, then adjusted in response to feedback from participating organizations.



# 1. UNDERSTANDING INITIATORS

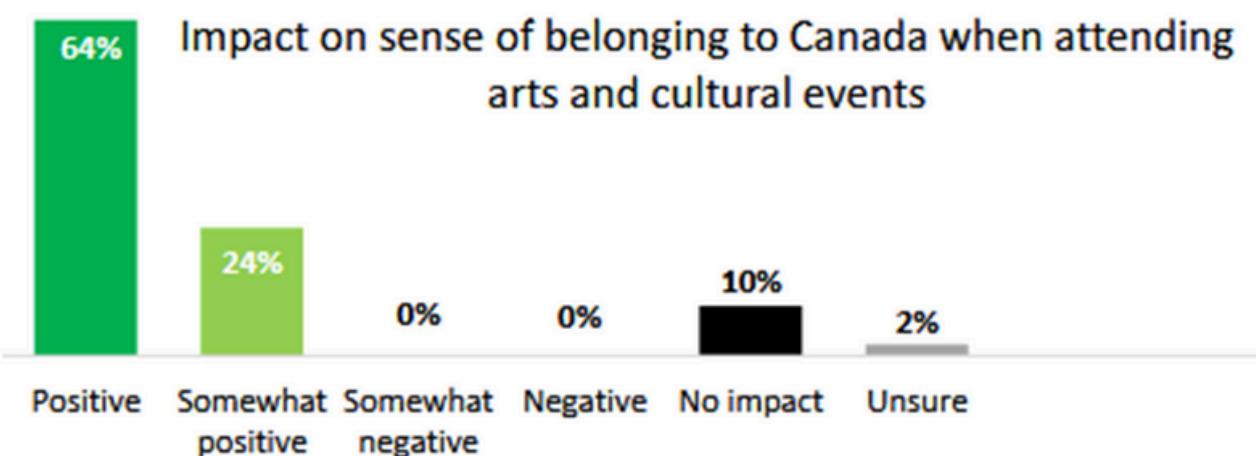
## a. Who are the Initiators?

*Initiators* are individuals who organize outings to cultural events for their friends and family, without representing an organization or having a formal role. Their main motivation is the joy of sharing a cultural experience, reflecting their love of the arts and desire for social connection. They initiate the group's participation in cultural events—selecting shows, coordinating logistics, buying the tickets—but most importantly, they take on the responsibility of motivating others.

Initiators are not influencers in the marketing sense of the word. They are not market mavens, trendsetters, or opinion leaders. Their influence is relational and emotional, and not based on a desire to share expertise or knowledge. They bring people together and create shared experiences around the performing arts. Rather than influencing the market, initiators influence the people around them. However, they do have an impact on local cultural organizations, and we could refer to them as “ambassadors” or “cultural organizers.”

According to the [\*Arts Response Tracking Study\*](#) (ARTS), 4% of respondents strongly agreed with the following statement: “I am the kind of person who likes to organize outings to cultural events for my friends.” Their top motivators for attending arts and cultural events were celebrating and reconnecting with their heritage and culture (19.7%); socializing with friends and family (15.3%); and learning new things (42.3%). Additionally, 88% of respondents stated that attending such events had a positive or somewhat positive impact on their sense of belonging to Canada.

Rank 1	Top three motivators to attend arts and cultural events
42.3%	Learning new things
19.7%	Celebrating and reconnecting with your heritage and culture
15.3%	Socializing with friends or family



The interviews conducted in the study allowed researchers to develop a general profile for initiators. Initiators are usually older adults who are often retired and have both free time and flexibility in their schedules. The physical accessibility of the event space is important to them, and it may even result in some logistical loyalty. Most subscribe to newsletters, making it easier for them to collect, receive, and distribute information, and then make decisions. Seat availability is a key factor in their purchasing decisions, as both initiators and their guests have seat preferences. Some purchase tickets well in advance to make sure they get the seats they want. When it comes to unforeseen events, initiators are quite understanding and take them in stride, as long as the organization communicates clearly and transparently about the issue.

Financial constraints are a common concern that may influence show selection or become a genuine barrier to attendance. The idea of perceived risk related to uncertainty about the experience (e.g., a disappointing show or uncomfortable conditions) came up repeatedly in the study. Initiators take on that risk on behalf of their guests, and don't want to disappoint them. At the same time, initiators also reduce the perceived risk for first-time attendees who might not otherwise dare to attend a show. Attending with someone, benefiting from a recommendation or receiving a discounted or free ticket through the initiator helps reduce that risk. This results in a transfer of risk.

Initiators are different from “individual” audience members because of their ability to create cultural micro-communities, i.e., a group of friends that regularly goes to the opera, a family that goes to the theatre together every year, or a volunteer who encourages their network to explore new shows.



Tentacle Tribe - Photo by Romain Lorraine

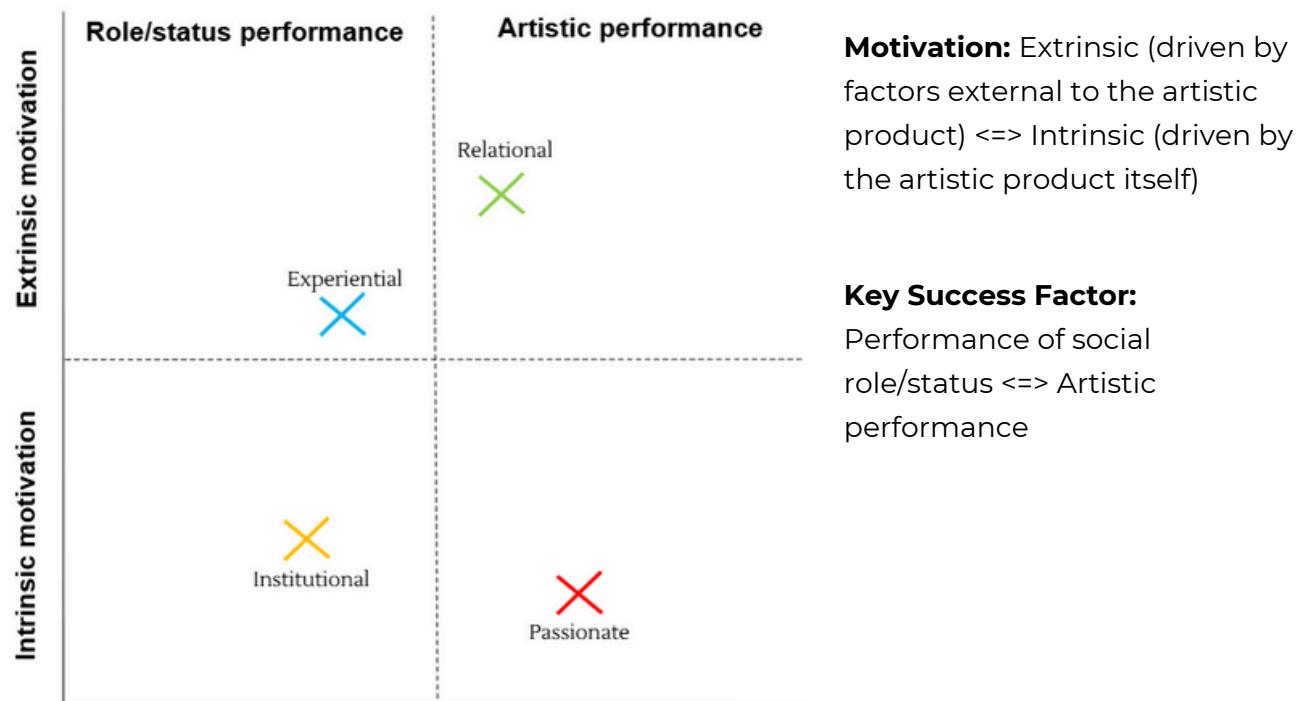
## b. A Typology of Initiators

By analyzing and coding interviews, we were able to identify four main initiator profiles. The profiles are not fixed—a single person may move between different profiles depending on the situation—but they provide useful insight into the wide range of motivators and practices observed.

All initiators, by definition, care deeply about the social and artistic dimensions of cultural outings. What varies is the relative intensity of those dimensions. The typology is built around two theoretical axes relating to the pre- and post-outing experience.

The first axis examines the source of motivation (intrinsic versus extrinsic) behind the outing. In other words, what sparks the decision to organize a cultural outing in the first place. The second axis considers whether initiators focus more on the artistic performance itself or on the performance of their social role. That is, after the cultural outing, initiators assess its success based either on the quality of the show or their sense of having successfully fulfilled their social role.

Figure 1 – A Typology of Initiators



## **The Institutional Initiator**

This type of initiator has a special status within the cultural institution, which grants them access to resources or a network. This includes, for example, volunteers and board members. Institutional Initiators act as mediators between the cultural offering and wider audiences. They operate within a framework of cultural dissemination and promotion. Institutional Initiators appreciate the fact that their status grants them privileges (advance access to programming information or early ticket purchases, special relationships with staff members) and seek a certain reputation and recognition within their network. They maintain strong, lasting relationships with organizations and contribute to the mission of bringing cultural experiences to audiences with limited prior exposure.

*The [staff] at the ticket office, [...] they're practically family. —Richard*

## **The Experiential Initiator**

Experiential Initiators are, above all, seeking a shared experience. The experience as a whole and its social component are both more important than the artistic performance itself. These initiators are attuned to the atmosphere and the sense of connection fostered by the experience. Outings are frequent.

*I consider an outing to be a success if I enjoyed it and my friends did too —especially if we're still talking about it the following week or the next time we see each other. —Alice*

## **The Relational Initiator**

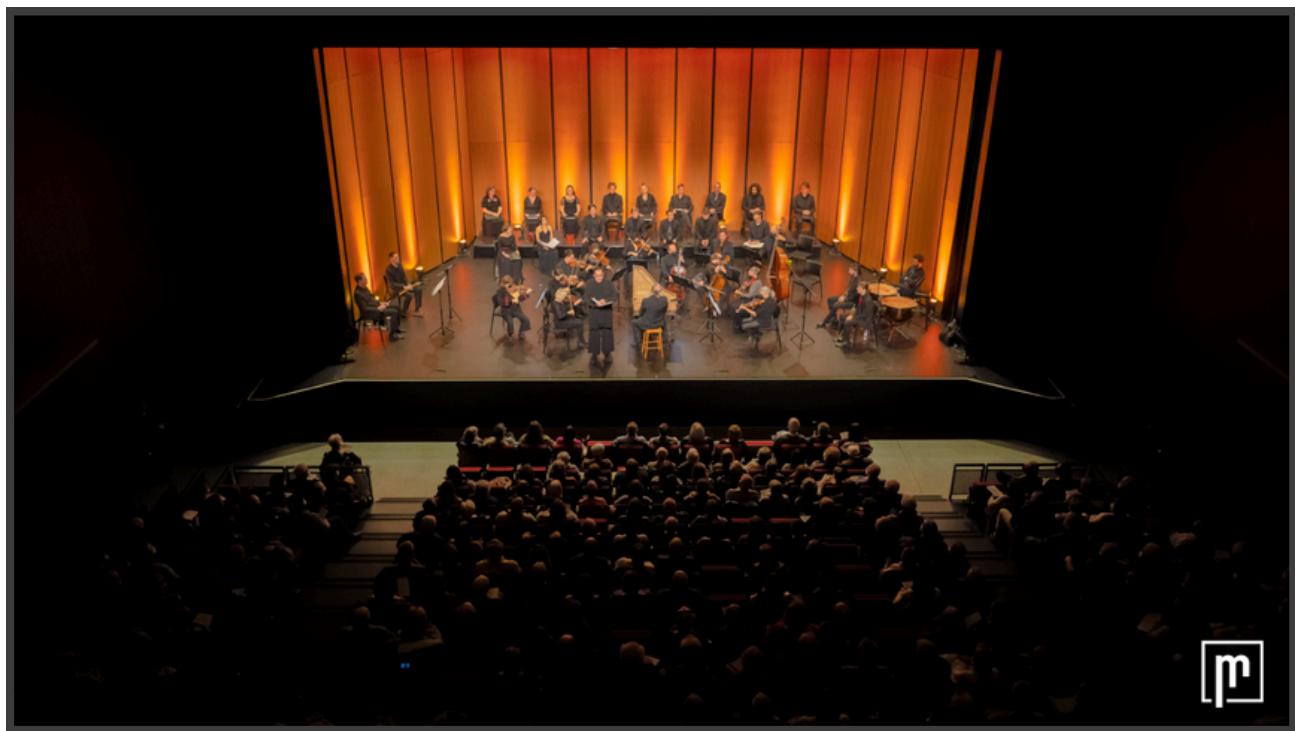
These types of initiators mainly organize outings for their family or a close, stable circle of friends. They play a central coordinating role, ensuring everyone's comfort and considering their preferences. Outings are seen as an extension of the friendship or family ties, a ritual with its own traditions, and an opportunity for sharing across generations. These initiators are looking for simple logistics and accessible locations.

*So it was interesting to see how our desire to spend quality time together as a family, to go out with them and introduce them to the theatre—a world they'd never experienced before—turned into a passion for two of my nieces. It's really wonderful. It's something we still have in common and often talk about. —Michael*

### **The Passionate Initiator**

This type of initiator is driven mainly by intrinsic factors such as discovery, curiosity, and intellectual stimulation. Passionate initiators may be willing to take risks by selecting unknown or experimental performances. Above all else, these initiators are looking to share a stimulating arts experience with the other people in their group. Pre- and post-show discussions about the artistic and aesthetic aspects of the performance are essential.

*Having that post-show experience, talking with people, and reflecting on the performance—that's part of the reason I started volunteering. —Sarah*



Haendel's Messiah at the Alphonse-Desjardins Theatre - Photo by Augustin Sénégou

## 2. KEY LEVERS FOR ACTION

Interviews with initiators and managers helped identify several concrete ways to help cultural organizations better recognize and support initiators.

According to the managers who were interviewed, the two main challenges in managing initiators are identification and the cost/benefit ratio. Launching an “initiator” strategy takes up time and resources. This is why we are suggesting the following three-stage approach before presenting recommendations:

Timeline	Action
Short term	Start with initiators who are known or who make themselves known (typically the institutional profile).
Medium term	Develop a personalized, relationship-based approach. Initiators value having a special relationship with organizations, so they need to be engaged, included, and invited (e.g., newsletters, special events).
Long term	Train reception staff to identify initiators and their guests. Analyze ticket office data to detect consumer behaviours specific to initiators (users purchasing several tickets at once and doing so multiple times over the course of the season, regular guests or—the opposite—a different guest every time, when tickets are named).

## a. General Recommendations

These recommendations apply to all initiator profiles. They help organizations address identified needs throughout the patron experience.

### **Physical Accessibility**

Develop a physical accessibility strategy that includes both building adapted infrastructure and communicating accessibility measures in advance.

Key moments:

- *Discovery*: Immediate visibility of essential information regarding the presence of features such as elevators, ramps, and reserved parking.
- *Purchase*: Seating plan made available, with accessible seating clearly identified.
- *Before the event*: Clear reminders of practical details (e.g., entrances, parking, and designated staff).
- *Arrival*: Signage and staff prepared to provide assistance.
- *After the event*: Support with exiting the venue and confirmation that everything went smoothly.

### **Resources and Timelines:**

Timeline	Action	Estimated Cost	Services
Short term	Update the “Visitor Information” web pages and the seating plan.	Low	Marketing
Medium term	Regularly train staff working at the reception and ticket office.	Low	Reception, ticket office
Long term	Improve infrastructure (signage, seats, ramps).	High	Management

## **The Social Experience**

The social aspect of the experience is fundamental to initiator behaviour. These people need opportunities to socialize in welcoming spaces that foster group interactions (e.g., lounges, bars, and similar areas).

Key moments:

- *Before the show:* Meeting points.
- *Intermission:* A space where the group can stay together.
- *After the show:* Ways to extend the outing.

## **Resources and Timelines:**

Timeline	Action	Estimated Cost	Services
Short term	If social spaces already exist, clearly communicate this through various channels (e.g., website or newsletters).	Low	Marketing, Reception
Medium term	Establish partnerships with nearby businesses (bars, cafés, restaurants).	Low	Marketing
Long term	Create welcoming spaces.	High	Management

## **b. Marketing Mix Recommendations**

### **Pricing Policies**

Cost plays a role in how much risk initiators and their guests are willing to take. Targeted incentives can help support initiators' engagement and participation. Over the long term, such incentives could be brought together under an "Initiator Program" that includes, for instance, promotional codes, discovery packages, and an annual quota of complimentary tickets to invite first-time attendees.

## Resources and Timelines:

Timeline	Action	Estimated Cost	Services
Short term	Reduce perceived risk by providing initiators with simple benefits, such as promotional codes.	Medium	Marketing
Medium term	Offer discovery packages and bundles designed for introductory outings.	Medium	Marketing
Long term	“Initiator” program	High	Marketing, Ticket office



Maddie Storovold at Arden Theatre - Photo by Ian Jackson

## Communication

Initiators are looking for information that is clear, concise, and easy to share. Their preferred communication channel is email. They appreciate being given ready-to-use communication tools (e.g., pitch, templates, visitor information, links, and seating plan), which encourages them in their role as hosts.

## Resources and Timelines:

Timeline	Action	Estimated Cost	Services
Short term	<p>Optimize content for sharing via social media (e.g., Open Graph tags).</p> <p>Suggest an email template they can use to invite friends and family.</p> <p>Send personalized messages to known initiators to maintain the relationship (information, invitations, and thank you notes).</p>	Low	Marketing
Medium term	Use a CRM tool to segment potential initiators.	Low	Marketing
Long term	Start a dedicated newsletter for initiators.	Low	Marketing

## Ticketing and Seating Management

Ticketing and seat selection play a critical role in the initiators' customer experience. They need to have some kind of overview of availability. Ticketing is also a key point where actions can be considered to improve initiator identification.



Dinosaur World Live at Centre In The Square - Photo by Tonya Brant

## Resources and Timelines:

Timeline	Action	Estimated Cost	Services
Short term	Allow for early bookings (i.e., pre-sales) with priority access to selected seats. Make the seating plan available. Ask your ticket provider how easy it would be to send a ticket to someone else.	Low	Ticketing
Medium term	Add a question for customers booking online and offline: "Are you buying tickets for other people?" Offer options tailored to the initiators, such as separate payments or sending tickets directly to guests.	Medium	Ticketing
Long term	Train staff to recognize and support initiators in ways that foster personalized, long-term relationships with them.	Low	Ticketing

## c. Recommendations for Each Initiator Profile

### **Institutional Initiators**

This is the profile organizations should begin with, because it is the easiest to identify, these initiators want to be known, and they are often already quite involved in the organization as volunteers, board members, or ambassadors. Since they need recognition, they should be offered VIP content and personalized messages so they can maintain the sense that this is a special relationship.

## **Experiential Initiators**

For this initiator profile, pre- and post-show experiences are important. The outing is really about having a shared experience. Provide suggestions for places where they might gather before and after the event. For the show itself, offering “discovery” packages (three different shows at a discounted rate, for example) may encourage initiators to try out new shows, while reducing perceived risk.

## **Relational Initiators**

This profile is focused on sharing cultural experiences with others, often with family. Building interpersonal relationships and ongoing conversations with these individuals can help identify future initiators. For this profile, ticketing software can be useful: look at the types of tickets purchased (child, adult, senior) and identify initiators, then provide clear, practical information ahead of time to simplify their logistics. Longer term, a personalized intergenerational offering or package could encourage them to pass down the initiator role.

## **Passionate Initiators**

This segment is a favourite among managers, though counter-intuitively, and is also the smallest and the least easy to identify. However, once an organization has identified Passionate Initiators, one recommendation that can work well with this profile is providing opportunities for artistic discussion. This means providing background information and/or artist statements before the show to nurture the relationship, or offering initiators and their guests exclusive access to talks and discussions about the performance.

# **CONCLUSION**

Initiators are a valuable resource for the performing arts. Their role goes beyond that of a mere attendee—they are mediators and ambassadors. By better understanding and supporting initiators, organizations can strengthen their ability to build lasting relationships with their communities.