



Market Research Findings

Board Presentation
July 23, 2018



GOALS AND AGENDA

Goal

- Review findings from recent market research and implications for ArtStream's outreach and marketing

Agenda

- Introduction and key findings
- Additional information

INTRODUCTION AND KEY FINDINGS

PROJECT GATHERED DATA TO HELP INFORM FUTURE OUTREACH AND MARKETING EFFORTS

ArtStream has made significant progress towards reaching the targets outlined in the strategic plan. Answering the following questions will help ArtStream in further achieving the outreach and programming plan priorities:

1. How to best focus and deploy marketing resources (*Which audiences does ArtStream need to reach in order to achieve expansion and outreach objectives? How should ArtStream most effectively reach these audiences and what information do these audiences want?*)
2. The pros and cons of first creating additional classes and workshops and then working to find participants vs first creating demand and then adding classes and workshops to satisfy that demand (*How should ArtStream sequence program expansion- create new programs and then work to fill the additional capacity, or create demand and then add programs to meet that demand?*)

This goal of this project was to provide data to help answer these two questions. As a next step, the Board may wish to consider how to sequence efforts and focus resources to achieve the remaining priorities under the strategic plan (*i.e., What are the specific actions to be taken and resources needed, financial implications and time-frame?*)

FINDINGS AND RECOMMENDATIONS DRAW FROM MULTIPLE SOURCES

Parent focus group
(5 parents)

Sibling focus group
(4 siblings)

Market research interviews with
parents and organizations working
with individuals with disabilities
(8 interviews⁽¹⁾)

Survey results
(42 survey responses⁽²⁾)

(1) Additional interviews with organizations working with individual with disabilities are in progress

(2) 69% (29) of the survey respondents described themselves as parents/guardians

KEY FINDINGS

Responses From Focus Groups, Interviews And The Survey Were Consistent

Recommendations from ArtStream families are the most important factor in the decision to participate in ArtStream

Word of mouth is the primary way awareness of ArtStream is created and interest in participating is generated

- The website is an important source for information on programs and suitability once a family learns about ArtStream, rather than a means of generating initial awareness

Focus outreach on providers of programs and services for those with disabilities to increase awareness and the pipeline for future participants

- Families and actors find out about ArtStream through other organizations and activities they are involved with

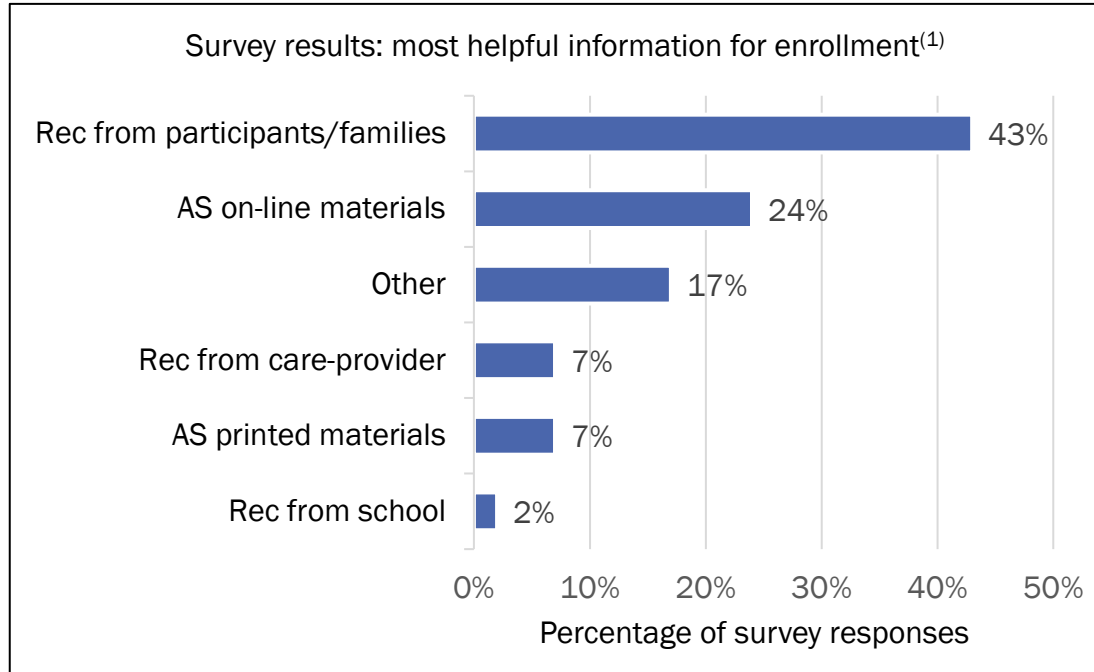
The website, e-newsletters and emails are the preferred way of obtaining needed information once a family is involved in ArtStream

Cost and program logistics are the primary factors which discourage people from participating in ArtStream

- Families can also find it challenging to determine the suitability of ArtStream, which can deter them from participating
- Placement on a waiting list is less of a deterrent than cost and program logistics

RECOMMENDATIONS FROM ARTSTREAM FAMILIES AND PARTICIPANTS ARE MOST IMPORTANT IN INITIAL ENROLLMENT DECISION

Word of Mouth Creates Awareness and Interest



Word of mouth is a key source of interest in ArtStream

- “Word of mouth can’t be understated” (sibling focus group)

Recommendations provide evidence of ArtStream’s value

- “The best source is other parents. They know what is good and what isn’t” (sibling focus group)
- “We need to find targeted activities that we know will work” (sibling focus group)

Families frequently learn about ArtStream from parents while participating in other programs (e.g., Special Olympics) or investigating opportunities for specific activities or skill development (e.g., drama programs, social groups)

- “Awareness is very grass roots and networking, word of mouth...want to hear from another family and avoid having to start at square one” (interview)

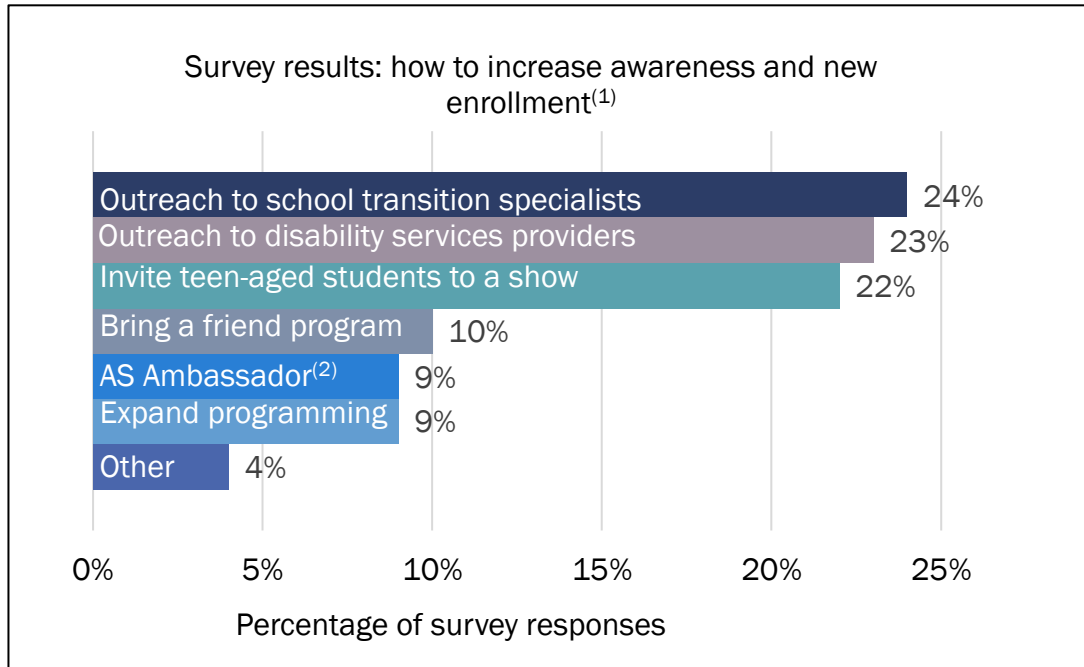
The website and other social media are important sources of information about ArtStream and programs, and are typically used after a family has already become aware of the organization

- “Website is the second place people go, first is word of mouth” (interview)
- “The website provides information and people form an impression of ArtStream when they look at it” (interview)

(1) N=42 (total number of answer choices to a question selected by survey respondents)

ARTSTREAM SHOULD FOCUS OUTREACH ON PROVIDERS OF PROGRAMS AND SERVICES FOR THOSE WITH DISABILITIES TO INCREASE AWARENESS AND THE PIPELINE FOR FUTURE PARTICIPANTS

Seeing ArtStream in Action Might Also Drive Enrollment



This type of outreach requires manpower

- “It would be great to have a foot soldier to do this kind of outreach” (interview)

Interviewees and focus group participants:

- Believe that conducting outreach to organizations that provide services and programs to those with disabilities is the best way to increase awareness of ArtStream and enrollment of new participants⁽³⁾

Providers are interested in information about, and assurance of the quality of organizations they refer-

“When we learn about an organization of interest, we invite representatives to speak to us and do a presentation” (interview)

“We don’t want to get in a situation of endorsing so we generally put out information on organizations that we’ve heard good things about from staff and families” (interview)

- Stressed the value of potential ArtStream actors, families and mentors seeing ArtStream in action-
“Some of the Special Olympics athletes in ArtStream invited other athletes to see an ArtStream show” (interview)

Social media is another means to demonstrate what ArtStream is all about and the range of people that participate. YouTube videos and song compilations were recommended

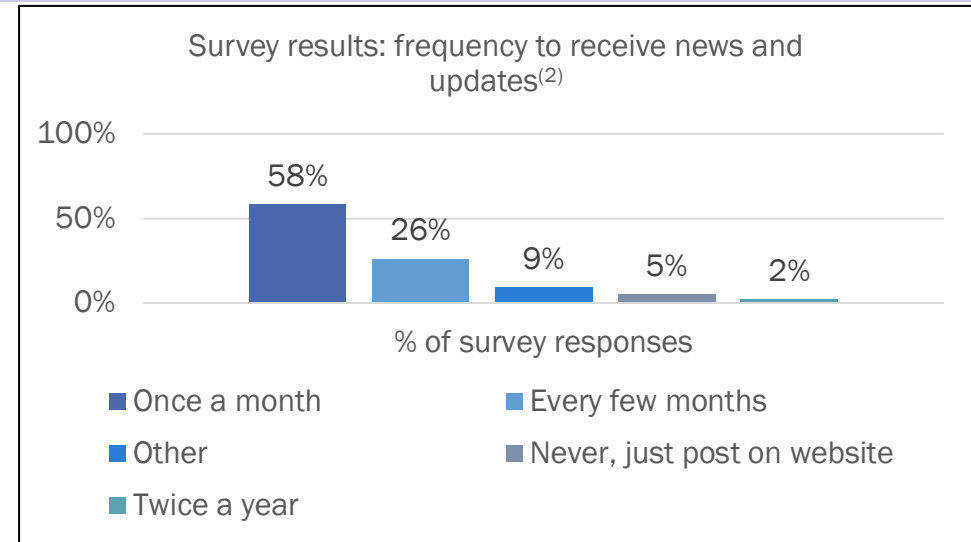
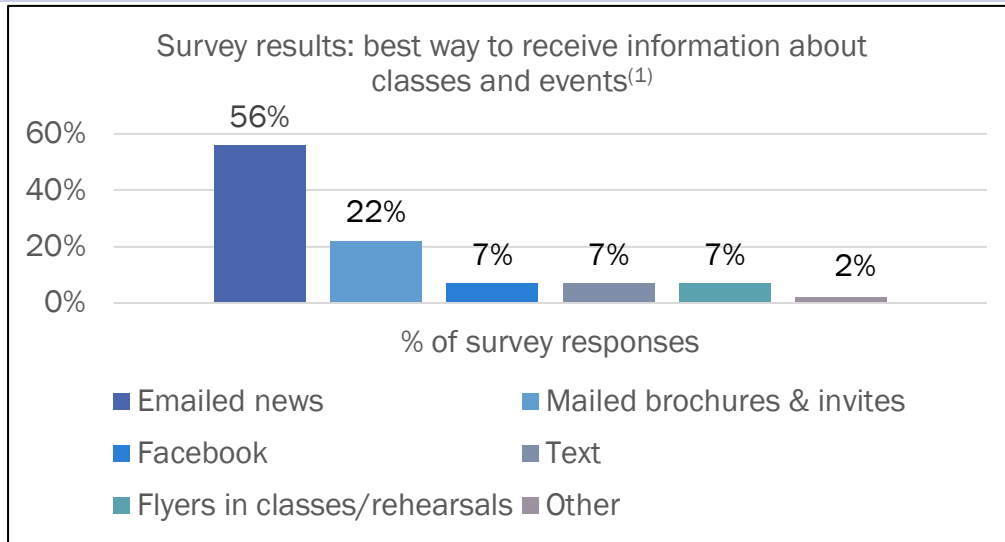
- Noted that outreach to business organizations could help with both awareness and sponsorship

(1) N=115 (total number of answer choices to a question selected by survey respondents; N>42 implies some respondents selected more than one answer to the question)

(2) Families/caregivers act as an “ArtStream Ambassador” to organizations that provide support to their family members

(3) List of specific outreach suggestions, including means of conducting outreach and organizations to approach, are included in Additional Information

EMAILS, E-NEWSLETTERS AND THE WEBSITE ARE PREFERRED MEANS FOR ARTSTREAM FAMILIES TO GET INFORMATION



Emails and e-newsletters provide important reminders and scheduling information for parents and siblings

- E.g., the weekly post-rehearsal emails from director Britt Burr helped families better support and engage with their actors about their experiences, as well as providing practical and helpful information

Website is also an important source of information and needs to present the organization well

- Several interviewees and survey participants commented that the website could be improved as it can be hard to navigate (e.g., for actors who are registering themselves) and find information (e.g., calendar of events)

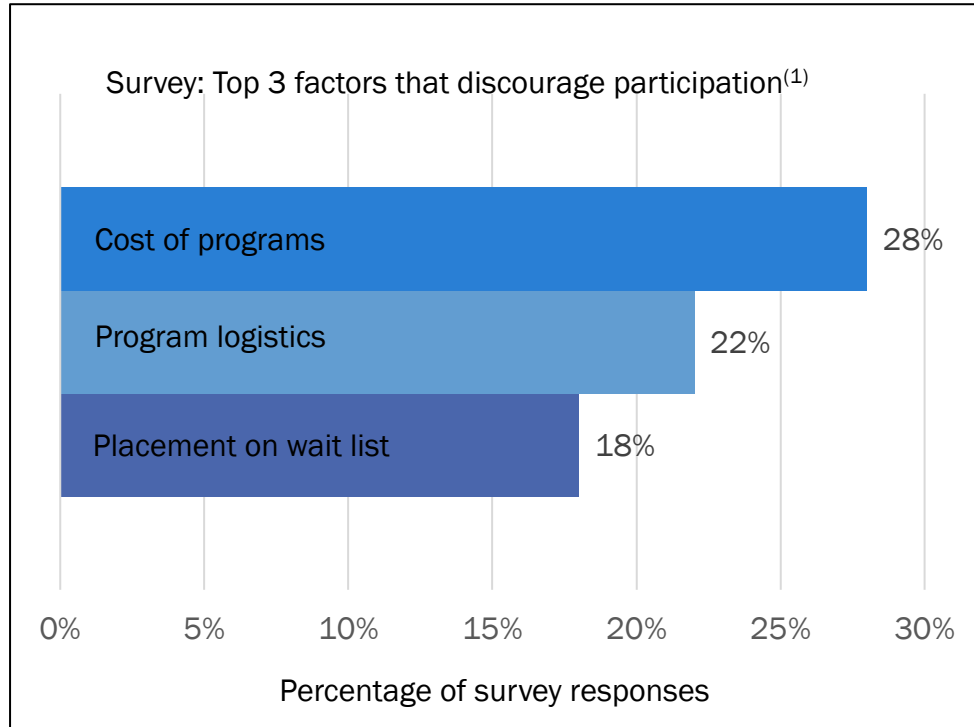
While electronic media is preferred, there are exceptions

- Conversations with staff are sometimes needed and provide valuable insights into actors, helping to support their success
- “A high quality playbill adds to the sense of quality and that ArtStream is a real theater experience” (interview)
- Hard copy materials to use in outreach meetings

(1) N=59 (total number of answer choices to a question selected by survey respondents; N>42 implies some respondents selected more than one answer to the question)

(2) N=43 (total number of answer choices to a question selected by survey respondents; N>42 implies some respondents selected more than one answer to the question)

COST AND PROGRAM LOGISTICS ARE THE PRIMARY FACTORS THAT DISCOURAGE PEOPLE FROM PARTICIPATING IN ARTSTREAM



Cost and program logistics were mentioned most frequently by focus group participants and interviewees:

Cost is a deterrent

- “It’s expensive- but not in terms of the quality and what you get. But you are still supporting them in lots of other ways, the expense seems like an extra” (parent focus group)
- “Very expensive to pay for [ITC] in a lump sum” (interview)
- “Social Saturdays are held too far away and cost a lot” (interview)

Program logistics are challenging (e.g., transportation to rehearsals, timing conflicts with jobs and other activities)

- “The locations - trying to get them there is sometimes too much” (sibling focus group)
- “It can be too far to travel for parents or actors” (interview)
- “I don’t always know schedules for all the other activities and there can be conflicts” (interview)

Reasons for dropping out of ArtStream include

- Scheduling conflicts or distance to program location
- Actor outgrows ArtStream or wants to try different activities
- Commitment is too great (e.g., learning lines, time)
- Challenging behaviors make participation difficult

Many interviewees mentioned that families may be dissuaded from enrolling by a lack of or mis-understanding of the suitability of ArtStream for their son or daughter

(1) N=68 (total number of answer choices to a question selected by survey respondents; N>42 implies some respondents selected more than one answer to the question)

PROSPECTIVE FAMILIES NEED TO BE ABLE TO BETTER UNDERSTAND WHICH PROGRAMS ARE APPROPRIATE FOR WHICH INDIVIDUALS AND THE BROAD RANGE OF PEOPLE THAT CAN BENEFIT FROM PARTICIPATION IN ARTSTREAM

Interviewees raised a number of challenges and misperceptions expressed by prospective families

Concern that their child will be successful and that supports are sufficient

- "A lot of people who can't imagine their child being out there. We've spent our lives protecting them" (Interview)

Lack of understanding who ArtStream is targeting and ways for a family to determine if a program is appropriate

- Unclear from current marketing
- Website has limited information

Lack of understanding that there is a place for actors with limited verbal abilities

Limited appreciation of the benefits of ArtStream

- Improved skills (e.g., verbal abilities, organization), focus, and confidence
- Social aspects, friendships and sense of community

Perception that focus is on actors with IDD so not a place for actors with strong verbal abilities who do not want to feel "different"

Concern that not a real theater experience as scripts are original

Interviewees provided several recommendations to make it easier for prospective families to determine the suitability of programs and appreciate the breadth of the ArtStream community

Provide opportunities to see ArtStream in action and demonstrate the range of skills

- YouTube clips from ITC and Cabaret performances, and classes
- Invitation to see a play as a guest of ArtStream

Improve information on the website

- Highlight the goals of different programs and the types of individuals they are suited for

Show the disability diversity of the ArtStream population as well as the inclusive aspect

Provide more clarity on the ITC process so that families understand how their actor will be supported and successful

- How the actors' capabilities are an integral consideration in the development of the play
- Auditions do not imply a certain skill level is needed

Provide opportunities to connect directly with ArtStream staff and families

- Open houses
- Be connected with a parent or have a parent host a prospective family at a performance

PLACEMENT ON WAITING LISTS ARE NOT A MAJOR DETERRENT FROM PARTICIPATING IN ARTSTREAM

Focus groups and interviewees did not see waiting lists as a significant concern, but recognize that many more people could benefit from ArtStream

“Clearly the demand is greater than the supply”(interview)

“Waitlists are an unfortunate aspect of the disability world” (interview)

“The waitlist says it is popular enough that people are willing to wait- it means that you can trust that people want it” (sibling focus group)

“Right now, ArtStream is the only game in town if your child really loves to perform, so I think most people are willing to wait” (survey)

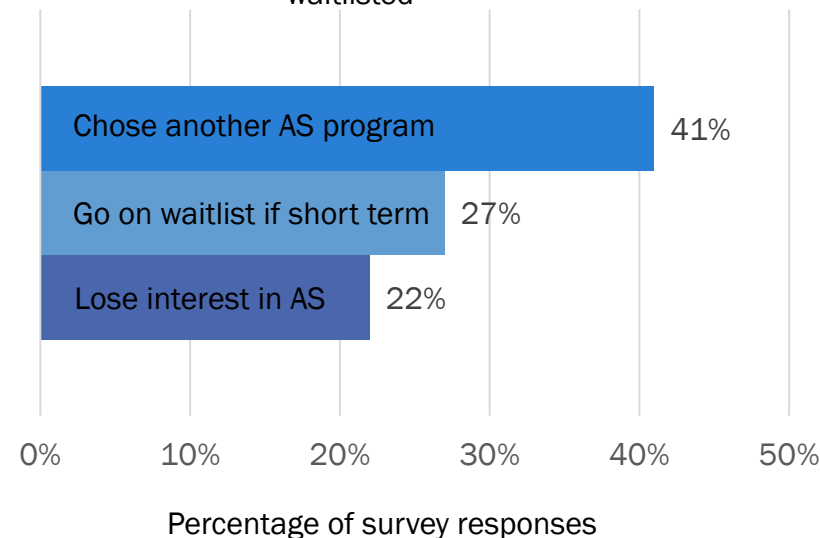
“Waitlists are more palatable than cancellation” (interview)

“Just because there’s demand, doesn’t mean that ArtStream should add to the supply”(interview)

- “ArtStream needs to improve funding of existing theater companies before taking on more” (interview)
- “ArtStream should stay close to its mission rather than feeling pressure to expand” (interview)

Several people questioned how aggressively ArtStream should pursue outreach when ITCs are full

Survey: Top 3 expected responses to being waitlisted⁽¹⁾



There are no great solutions to waitlists but families recognize they are lucky because they are in ArtStream. Some suggestions:

- Provide greater clarity on expected timing of waiting lists
- Increase number of cabarets
- Rotate actors out of companies for a period (not viewed as a palatable alternative to current ArtStream families, however⁽²⁾)

(1) N=49 (total number of answer choices to a question selected by survey respondents; N>42 implies some respondents selected more than one answer to a question)

(2) For example, sibling focus group participants noted that it is hard for individuals to build relationships and ArtStream is an important part of their lives so a rotation out of an ITC would be difficult for them

ADDITIONAL INFORMATION

- Additional findings and suggestions from focus groups and interviews
- Outreach recommendations
- Survey participant breakdown
- Focus group and interview participants

ADDITIONAL FINDINGS AND SUGGESTIONS FROM FOCUS GROUPS AND INTERVIEWS

Parent focus group

- Informal (e.g., waiting at rehearsals) and formal (e.g., Parent Meet and Greet) gatherings are appreciated and contribute to a sense of belonging to the ArtStream community
- ArtStream should provide a greater understanding of what it takes to fund ArtStream (i.e., tuition, ticket sales and grants cover only a portion of costs)
 - Might help enlist parents in fundraising
- Parents heard about ArtStream while participating in other programs including Imagination Stage, Special Olympics, Boy Scouts, TransCen and Target Achiever's Circle

Sibling focus group

- ArtStream is an important part of their sibling's lives
- Being part of the ArtStream community comes from attending shows and meeting other families while at rehearsals
 - Siblings value the opportunity to meet others who are also dealing with the same challenges of having a family member with a disability, share information, and meet other siblings
- They are interested in getting involved with other siblings to help out more (fundraising, outreach, speaker and networking events)
 - Siblings bond because they face the same challenges and future responsibilities

Interviews

- Offer a gathering for parents during rehearsal or organize events so that parents can meet each other and share ideas and resources
 - ArtStream can use as vehicle to enlist parent support (e.g., gala planning)
 - Opportunity to invite prospective parents
- Value of ArtStream
 - Networking with parents is a positive of being part of the community; feel they are part of the community because of their son or daughter's participation
 - Social aspects and friendship is a big benefit for actors
 - ArtStream is one of the few organizations that can handle certain behaviors
- Suggestions
 - Provide orientation on the ArtStream process for families, mentors and others getting involved for the first time
 - Tell people upfront that a class could be cancelled
 - Allow for last minute sign-ups if openings as would help with scheduling issues

ARTSTREAM SHOULD REACH OUT TO ORGANIZATIONS THAT PROVIDE PROGRAMS OR SERVICES TO THOSE WITH DISABILITIES

Outreach Could Increase Awareness and Participant Pipeline

Recommended categories

- Schools, including public and private schools with special education
- Transition specialists and programs
- College programs for people with disabilities
- School drama departments and drama teachers in public, private and special needs schools as source for actors and mentors
- Pre-employment agencies
- Agencies with day programs or manage people with disabilities
- Group homes
- Case managers
- Special needs workshops and fairs
- Autism organizations
- Businesses, to increase both awareness and sponsorship (e.g., Chamber of Commerce, Rotary Club)

Suggested organizations & platforms

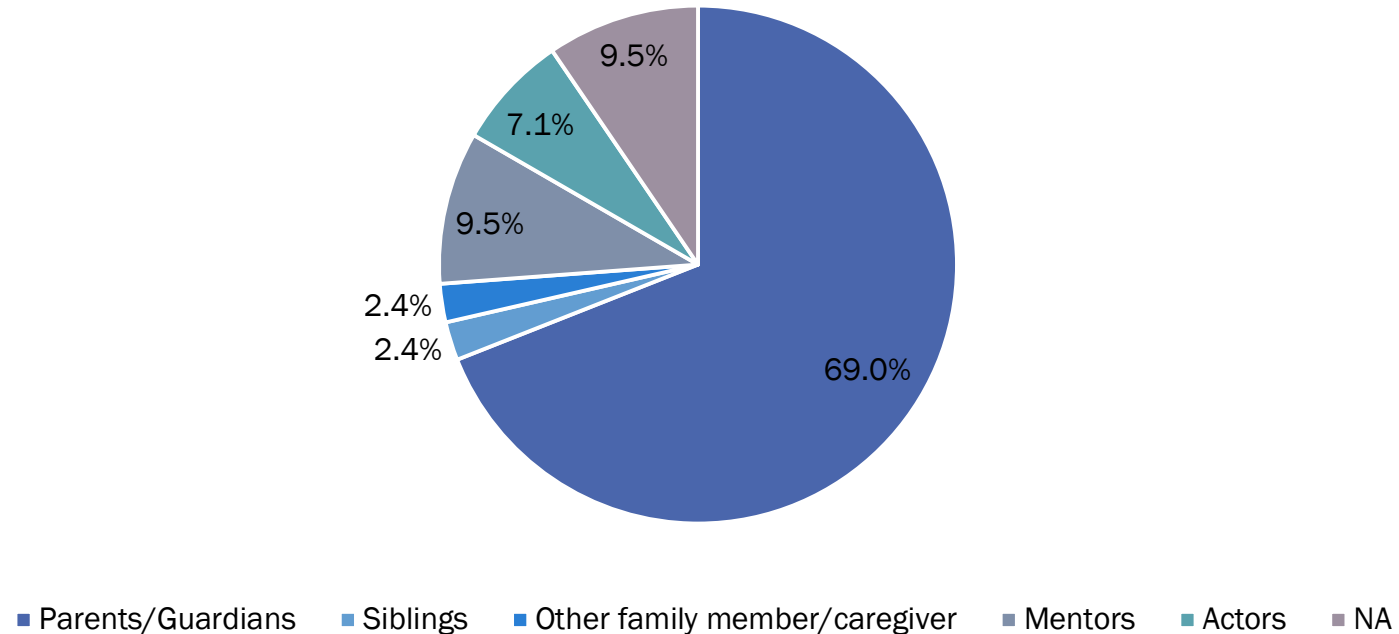
- Montgomery County transition digest email
- Transition Working group Facebook page
- Project Search / SEEC
- Ivymount
- Kennedy Center Experiential Education Initiative
- Governor's Transitioning Youth Initiative
- Main Street
- JCC
- Best Buddies (source for mentors as well)
- Catholic University social work programs (source for mentors as well)
- Chimes
- ARC
- ServiceSource
- JSSA
- Bethesda Academy of Performing Arts
- Montgomery College

FOCUS GROUPS AND INTERVIEWEES HAD A NUMBER OF ADDITIONAL SUGGESTIONS FOR OUTREACH

- Invite people to see a performance
 - Families whose kids can grow into ArtStream so they can see what actors are capable of, and the benefits of participating
 - Field trips where other service providers can bring their students to see peers performing on stage
 - High school theater departments - might be source for mentors and recognition of what actors with disabilities can do
 - Parents can invite groups they are involved with to attend a play (e.g. book club)
 - Actors can use their networks and social media to invite friends
- Provide an opportunity for personal relationships with prospective families so they can better understand ArtStream, what is available for their child and how accommodations are made
 - Offer to put prospective families in touch with ArtStream families or assign them a parent buddy if they attend a show
 - Welcome new parents with small gatherings
 - Hold meetings or coffees with ArtStream staff to talk about programs
- Convey the benefits of ArtStream to actors
 - Improvement in verbal abilities, confidence, focus and organization
 - Build a community of which they are part
 - Receive support, structure and do things they have not done before
- Provide marketing support
 - Create materials for those involved with ArtStream or doing outreach (e.g., parent and mentor testimonials, mini-press kit that parents or mentors could use if speaking to another school or organization that they are involved with)
 - Get partner organizations on newsletter distribution so they can be aware of and promote events or maybe put on community calendar if they have one
 - Get on listservs that go to transition specialists- helpful to feed them information so they can tell families they work with

PARENTS/GUARDIANS COMPRISED THE MAJORITY OF SURVEY RESPONDENTS

Percentage breakdown of category of survey respondent



42 surveys were completed

- The survey was sent to 263 email addresses (ArtStream received a 16% response rate)
- Survey data was not analyzed by category of respondent given the small numbers of non parent/guardian respondents

FOCUS GROUP AND INTERVIEW PARTICIPANTS

Focus groups

- Parents- 5 parents with sons and daughters in an ITC
- Siblings- 4 siblings of actors in an ITC

Interviews

- Parents- 5 parents who are or have been active with other organizations that provide programs or services to those with disabilities
- Barbara Schelstrate, Music Director, Arlington ITC
- Katie Keddell, Access Coordinator, Imagination Stage
- Rikki Epstein, Executive Director, ARC of NOVA

Additional interviews with organizations who could be referral sources will be conducted in the next few weeks