

2016 YANJEP Client Research Project

Summary of Survey Results

August 26, 2016

BACKGROUND

In order to increase reach, sales, and number of children served, Young Audiences New Jersey Eastern Pennsylvania (YANJEP) seeks to understand the factors that influence educators' decisions to book assemblies and residencies. To achieve this, YANJEP has engaged communications consultant Ruth Zamoyta (RZ) to develop, implement, and analyze client surveys and interviews. For the Phase I of the two-phase study, an online survey was designed to gauge the motivations, attitudes, and behavior of current and lapsed clients. The second phase will entail in-depth interviews of select clients, to probe more deeply into survey findings and to answer questions that were not suitable for survey format. As we have now completed Phase I, the following Summary of Survey Results is an interim report.

QUESTIONS TO EXPLORE

YANJEP and RZ worked together to compile the following list of questions to explore:

1. Who identifies the need for extra-curricular programming and when? Who decides which programs to book?
2. How many assemblies and residencies does the school or organization host? Has the number of annual programs been fluctuating over the last 3 years? Has the nature of the programs changed (science v. art, single performance v. residency, etc.)? If so, why? What are the opportunities and risks?
3. What factors influence the decision to book an event with YANJEP?
 - a. Precedents, tradition, pre-existing guidelines
 - b. Personal interest/value
 - c. To fulfill to state-mandated curriculum
 - d. Recommendation (from whom?)
 - e. Track record/reputation
 - f. Ease of purchase/customer service

- g. Pricing
 - h. Breadth of choice
 - i. Availability/scheduling
 - j. Diversity initiative
 - k. Availability of accessible programming/accommodations
 - l. Supplemental tools such as study guides, video tutorials, lesson-plan banks, etc.
 - m. Other factors
4. When is a decision made? Is it anchored to another event such as a school board meeting? At a certain time in the school year? During a meeting or home late at night?
 5. For schools or organizations that have been interested in booking an event with YANJEP but decided not to, what were the barriers?
 6. Who/what are YANJEP's competitors? What alternatives were considered in the purchasing process? What are the qualities of YANJEP that set them apart from the rest, and make clients choose YANJEP? What do clients like/dislike about the booking process and the programming?
 7. How do clients hear about YANJEP? Are there hidden markets that YANJEP has not yet tapped? Or is the field saturated?

SURVEY RESULTS

Between August 2 and August 24, 2016, 138 respondents visited the survey website, and between 120 and 125 individuals completed the questions. The survey was made available electronically only, and YANJEP promoted it through e-blasts from Executive Director Michele Russo to targeted clients. The following is a summary of the survey results. At times the data have been segmented and cross-referenced, resulting in fewer than 100 respondents. Wherever 100 or more responses were collected, the data is considered significant, and can be extrapolated within a slight margin of error to apply to all clients. The results from any questions answered by fewer than 100 respondents are not significant, but may suggest a trend.

1. Who identifies the need for extra-curricular programming and when? Who decides which programs to book?

Respondents were asked to indicate to what extent the input of administrators, teachers, PTO reps, parents, students, and board members influences what assemblies and workshops are booked by their school or organization. As Figure 1 shows, “Administrators” was the most popular answer, with 61 respondents (50%) indicating that they are extremely influential, and 33 (27%) indicating that they are somewhat influential. “Teachers” were also shown to be strong influencers, with 45 (37%) of respondents stating they are extremely influential and 46 (37%) stating they are somewhat influential. “PTO representatives” and “Students” followed closely behind. In the 17 open-ended comments, again teachers and administrators were mentioned, for the most part. The staff of YANJEP noted that in perusing the names of the respondents, it was clear that there were more administrators who completed the survey than PTO reps, even though a good number of PTO reps were invited to take the survey. This suggests that administrators are more invested in the process than PTO reps.

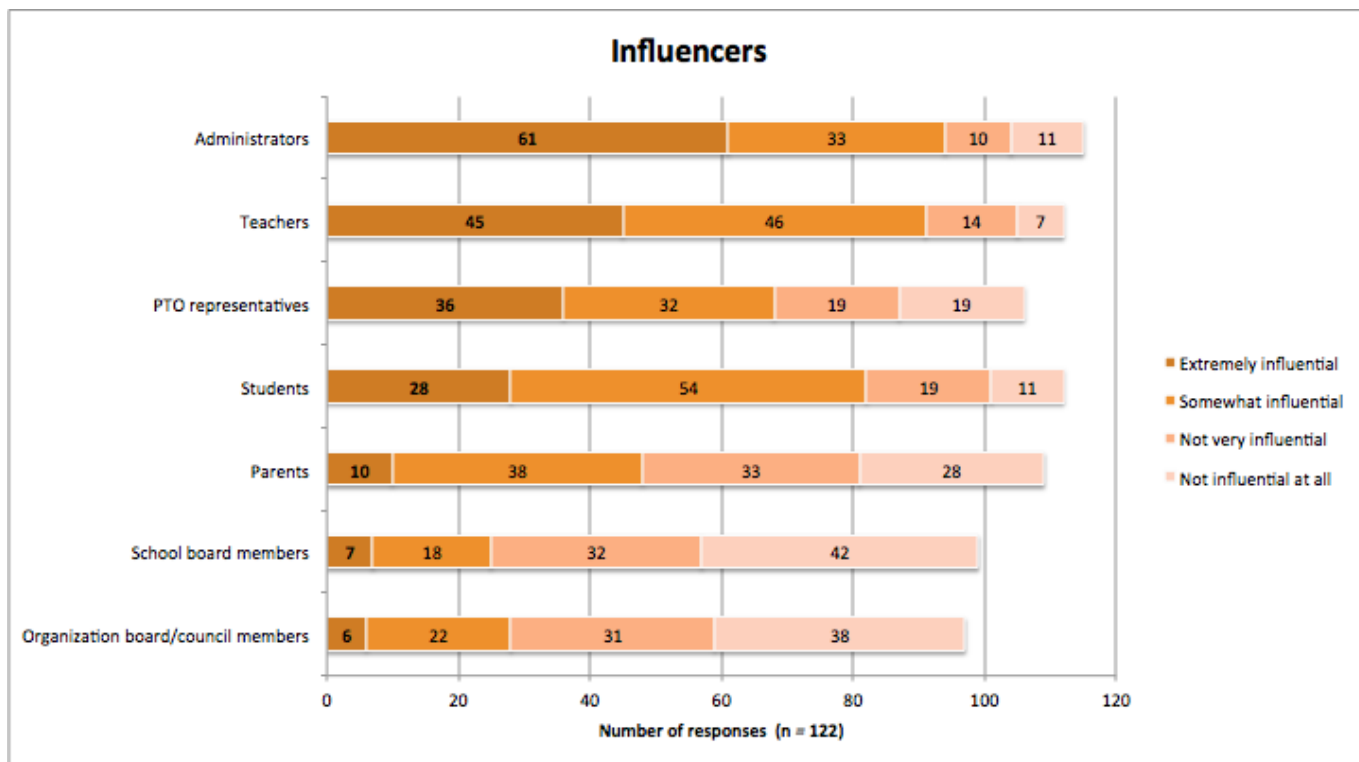


Figure 1

Recommendations:

- In the interview phase, RZ will explore more deeply the decision-making process, asking interviewees to describe the process of booking in order to gauge how these different constituents affect the decision.
- When combining the “extremely influential” and “somewhat influential” scores, “Students” top “PTO reps.” This might suggest an opportunity for YANJEP to focus messaging on student satisfaction, through testimonials, photos, and data. In the interview phase, RZ will ask more about the student influence.

2. How many assemblies and residencies does the school or organization host? Has the number of annual programs been fluctuating over the last 3 years? Has the nature of the programs changed (science v. art, single performance v. residency, etc.)? If so, why? What are the opportunities and risks?

Respondents were asked how many assemblies or performances in various subject categories their schools or organizations hosted in the past three school years. They were asked to include school-wide and small-group assemblies, curricular and extracurricular assemblies, and assemblies/performances booked through YANJEP as well as other vendors. The findings suggest that there are far more arts assemblies than history, STEM, or character-building assemblies. In fact, 24% of respondents indicated that they had no history assemblies in the past three years, 21% said no character-building assemblies, and 35% said no STEM assemblies (see Figure 2).

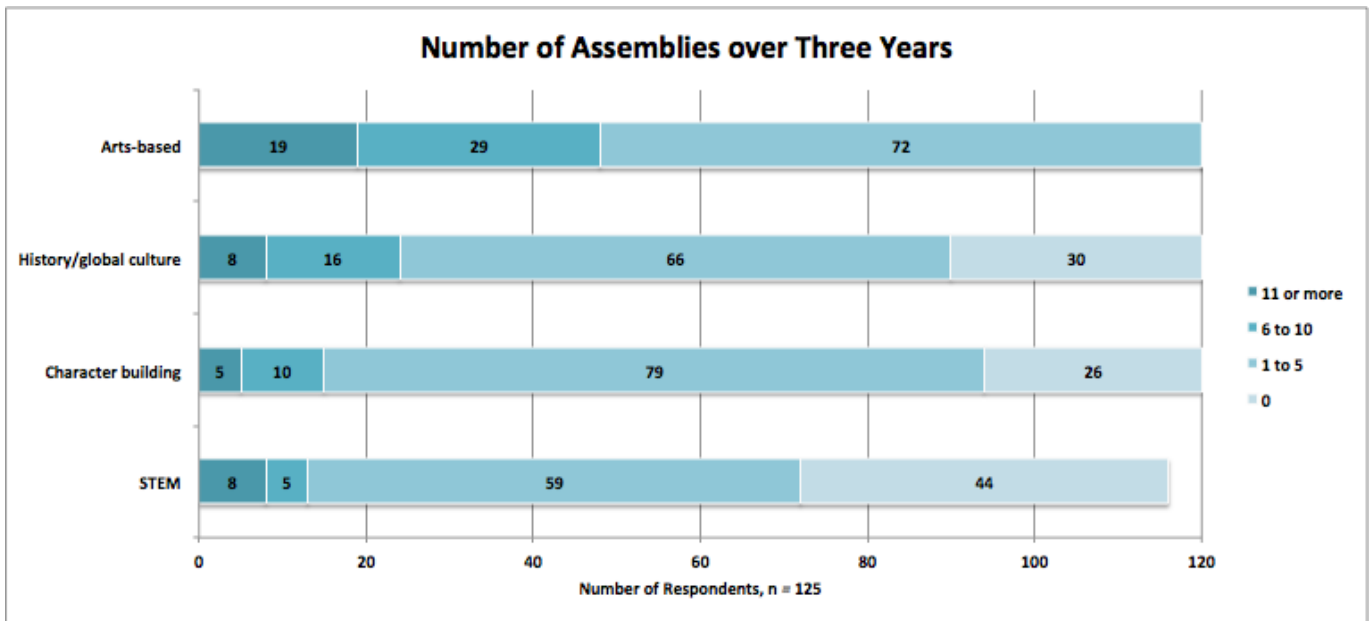


Figure 2

We asked respondents if the number of assemblies/performances by subject category has increased, stayed the same, or decreased over the past three years. Across the board the number of assemblies has stayed the same or increased, with STEM assemblies increasing at a slightly higher rate than other disciplines (see Figure 3). The comparatively low number of STEM assemblies over the past three years combined with the reported higher increase in STEM assemblies suggests that demand for STEM assemblies is increasing at a rapid rate.

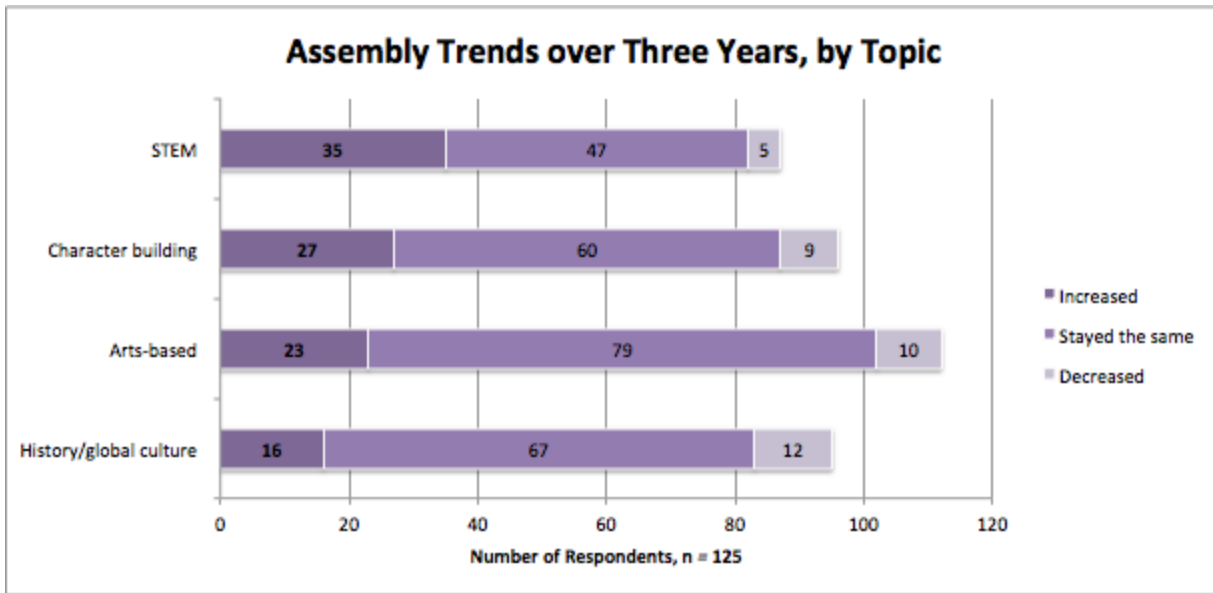


Figure 3

Respondents were asked the same questions about residencies and workshops. Results show that respondents in general host slightly more arts-based residencies than in the other disciplines (see Figure 4).

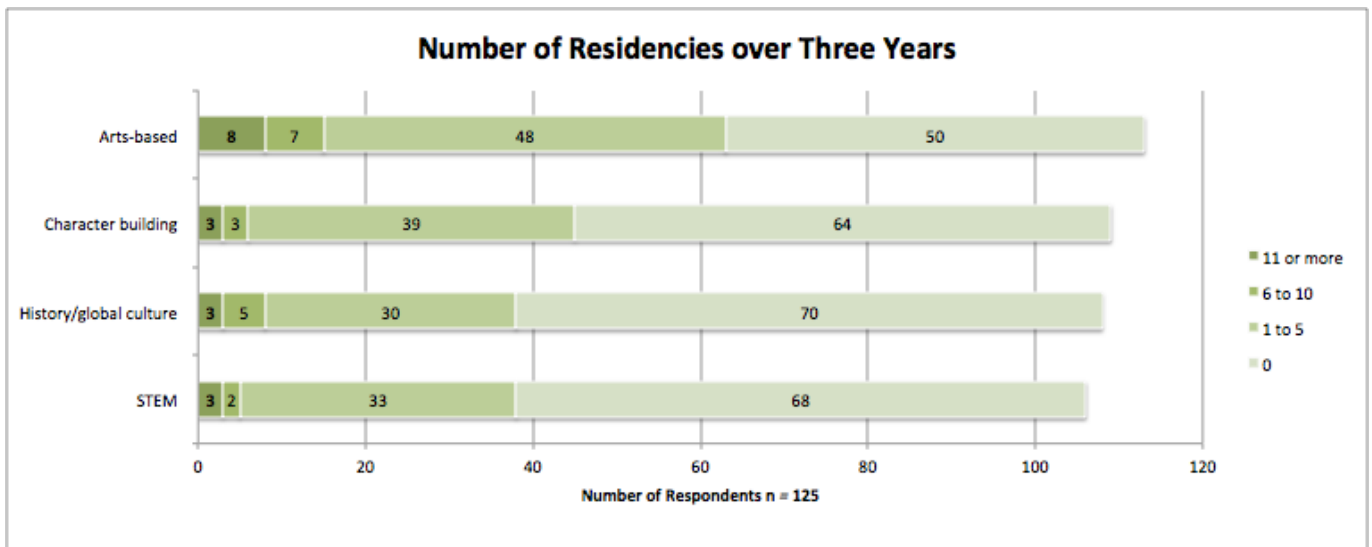


Figure 4

According to respondents, the number of residencies hosted has largely remained the same or slightly increased, across all subjects, with STEM residencies increasing at a slightly higher rate (see Figure 5).

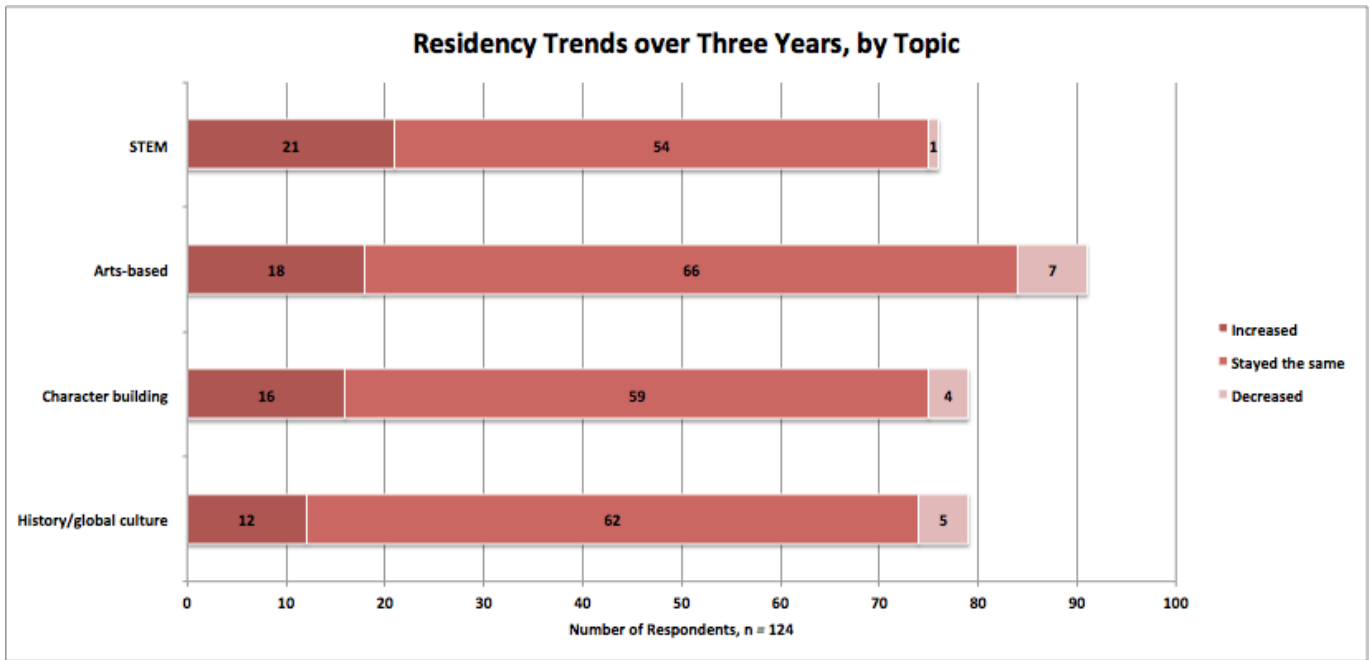


Figure 5

Respondents were also asked how many assemblies and residencies they booked over the past three years from YANJEP. The results (Figure 6 and 7) show that YANJEP is by far the leading provider among respondents to this survey. The most discrepancy can be seen in non-arts assemblies, and in STEM residencies. Nineteen respondents (16%) who booked history/global culture assemblies did not book with YANJEP, 26 (21%) who booked character building assemblies did not book with YANJEP, 23 (11%) who booked STEM assemblies did not book with YANJEP, and about 22 respondents (18%) who booked STEM residencies did not book with YANJEP.

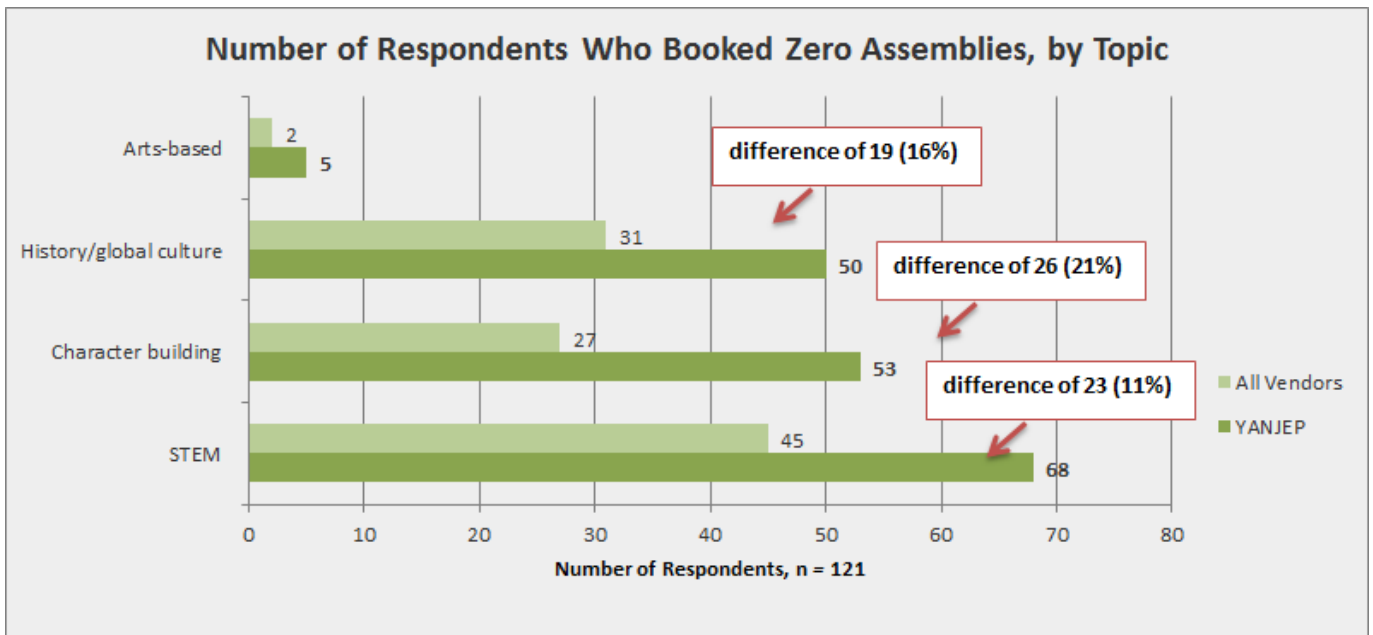


Figure 6

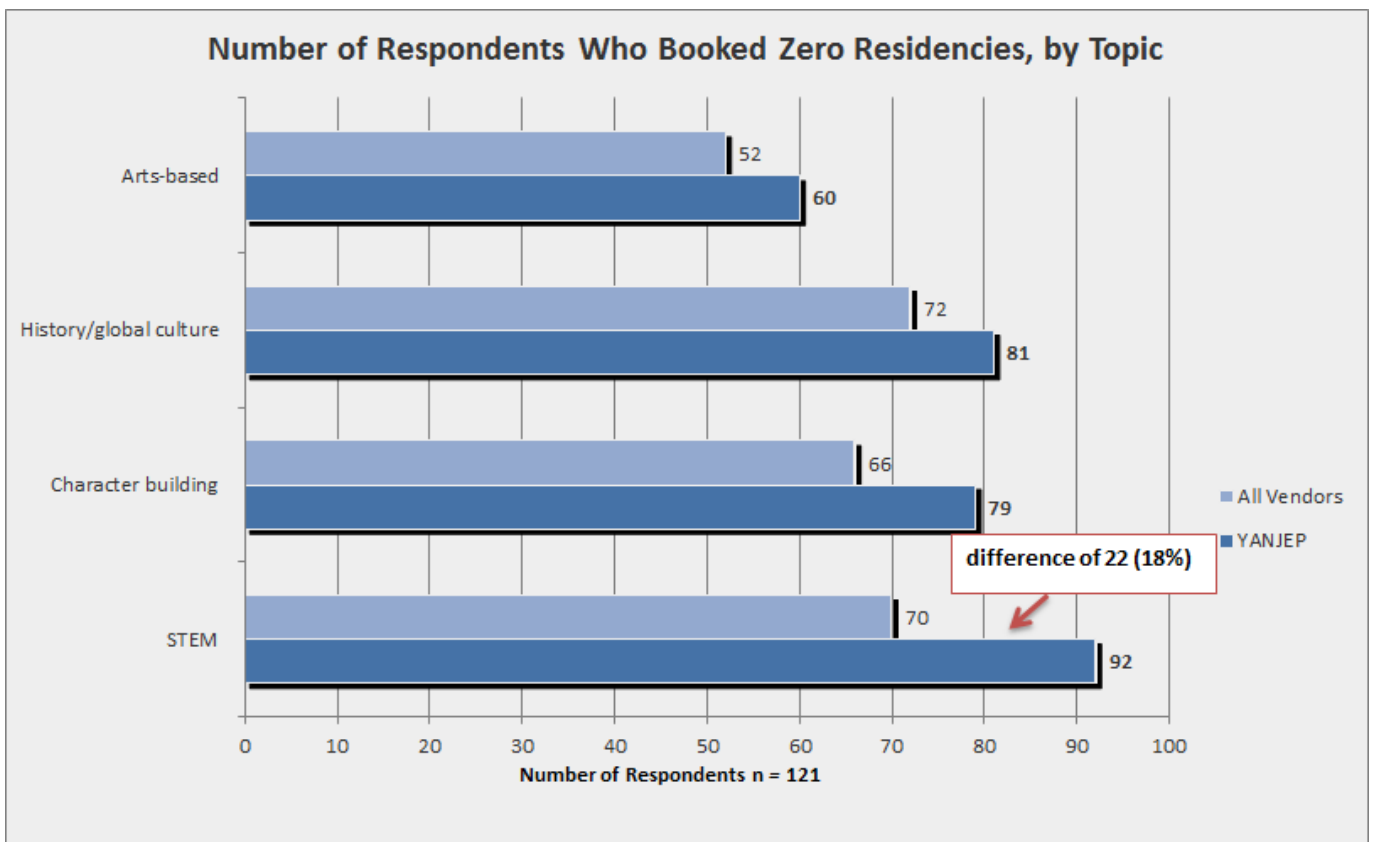


Figure 7

Recommendations:

- RZ will ask interviewees whether they are inclined to add even more STEM-based programs in the future, and if an increase in assemblies or residencies in one field will necessitate a decrease in another field.
- RZ will speak with respondents who indicated that they booked residencies and assemblies (especially STEM) through vendors other than YANJEP, and ask who provided those residencies and what was the rationale behind the choice.

3. What factors influence the decision to book an event with YANJEP?

As Figure 8 shows, when respondents were asked what factors influence their decision to book assemblies or residencies, three factors clearly rose to the top: price, reputation, and the presence of a diversity element. It is worth noting that of the 121 people who responded to this question, 11 wrote-in comments indicating that ties to the curriculum are an important factor. This suggests that if “Ties to the curriculum” had been offered as a response in the multiple-choice question, it would have had a response in the mid-range, along with “Convenience,” “Teacher interest” and “Precedents.”

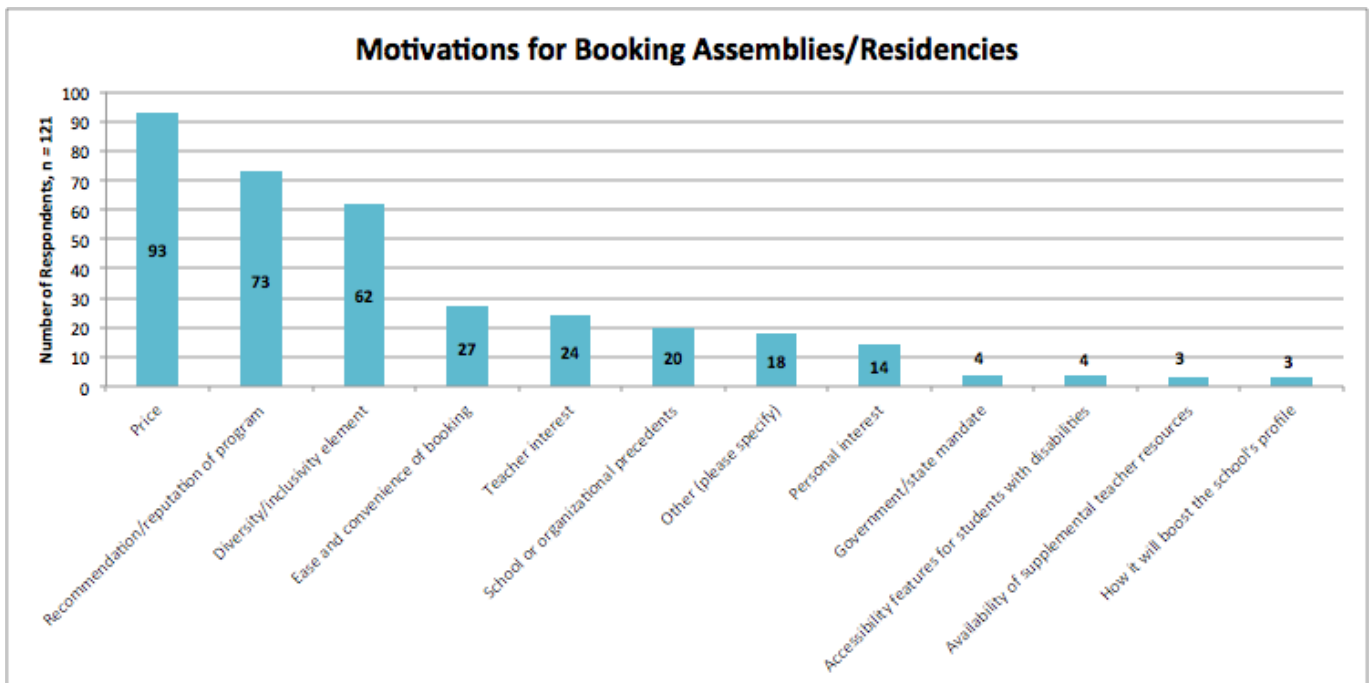


Figure 8

Whereas price and reputation of the program are to be expected as motivators, “Diversity/inclusion element,” which was chosen by 51% of respondents, is worth serious consideration by YANJEP when it comes to programming, staffing, communications, and marketing. Also, as YANJEP begins to develop its added-value component of providing supplemental materials like lesson plans, it should be noted that only 3 respondents chose “Availability of supplemental teacher resources” as a main motivation.

Recommendations:

- The desire for a diversity element in programming should be communicated to presenters and instructors. Descriptions of the programs in print and digital publications should emphasize the diversity and inclusion facets of each program. Culturally diverse performers and students should be featured in photographs on communications. YANJEP might also consider developing a campaign to position itself as the only assembly provider in the area that celebrates diversity in all of its programs.
- RZ will explore educators’ desire for supplemental resources more in-depth during the interview phase.

4. When is a decision made? Is it anchored to another event such as a school board meeting? At a certain time in the school year? During a meeting or home late at night?

Respondents were asked, “When are decisions made to book assemblies and workshops?” They were given a range of answers and were asked to select all that apply. In Figure 9, the responses “Varies from year to year” and “Every year at the same time” appear in green. Of the 94 respondents who chose one of these two options, 63% indicated that their timing varies, whereas 37% indicated that it is consistent from year to year. In terms of seasons, summer and fall have the edge on the spring.

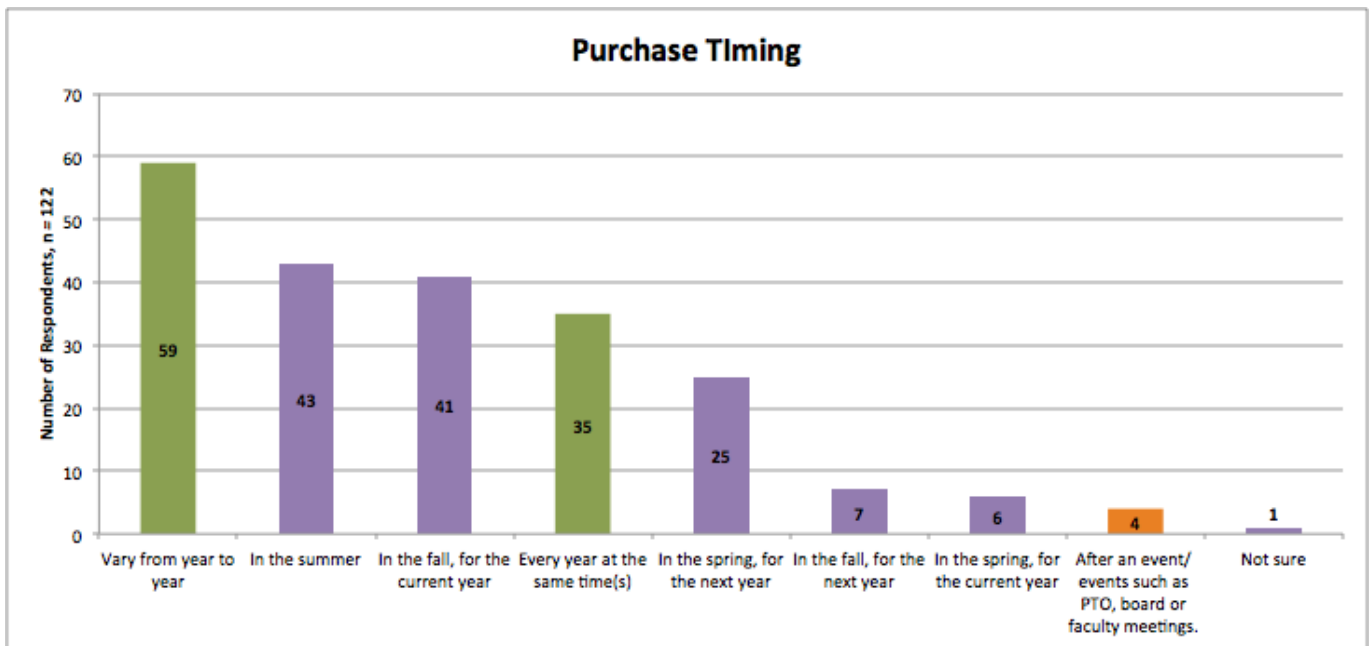


Figure 9

Respondents were also asked to what extent assemblies and workshops rely on certain types of funding, if they are not already covered in operating budgets (see Figure 10). It is worth noting that 26% of respondents claim that assemblies and residencies are contingent on fundraising.

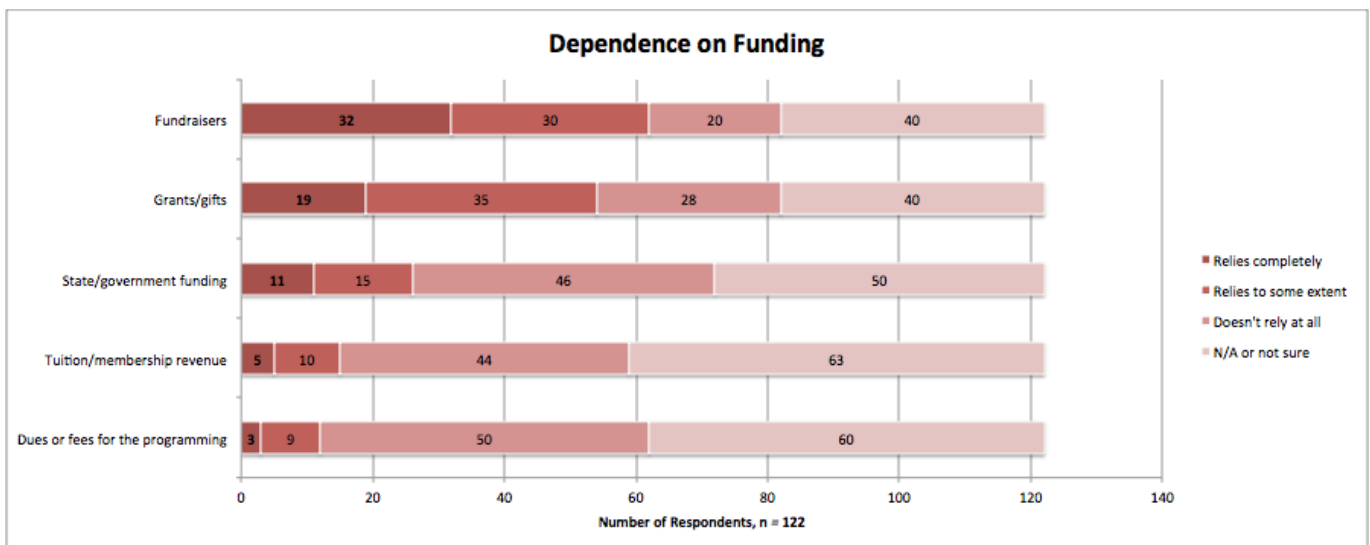


Figure 10

In looking at the responses from schools or organizations that indicated they are non-public, there is not much difference in funding dependency from the overall totals (see Figure 11).

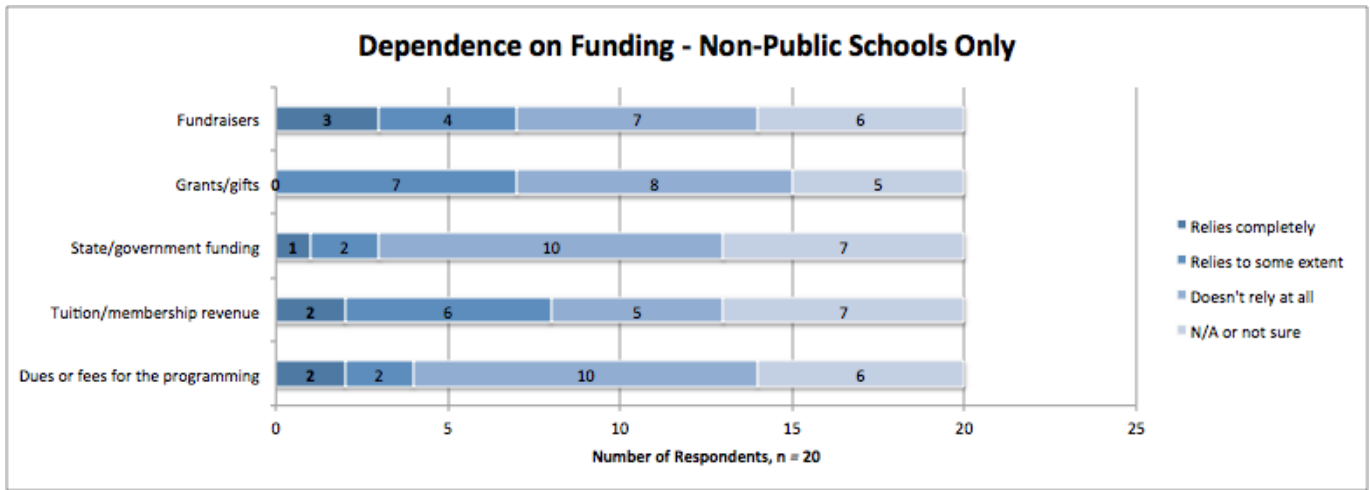


Figure 11

Recommendations:

- Marketing efforts should be strong in the summer and fall. Individual clients’ timing patterns should be noted on client records, to determine which ones book at the same time every year.
- YANJEP should think about how it can help clients have successful fundraisers, such as by providing promotional materials, links to videos of its programming, or brief presentations at fundraising events.
- In the interview phase, RZ will more closely examine the path to purchase, and determine what communications from YANJEP would be most influential, at what point along that path.

5. For schools or organizations that have been interested in booking an event with YANJEP but decided not to, what were the barriers?

Survey results show that 31% of respondents have been interested in booking an event with YANJEP but decided not to. By far, the reason was pricing, as shown in Figure 12.

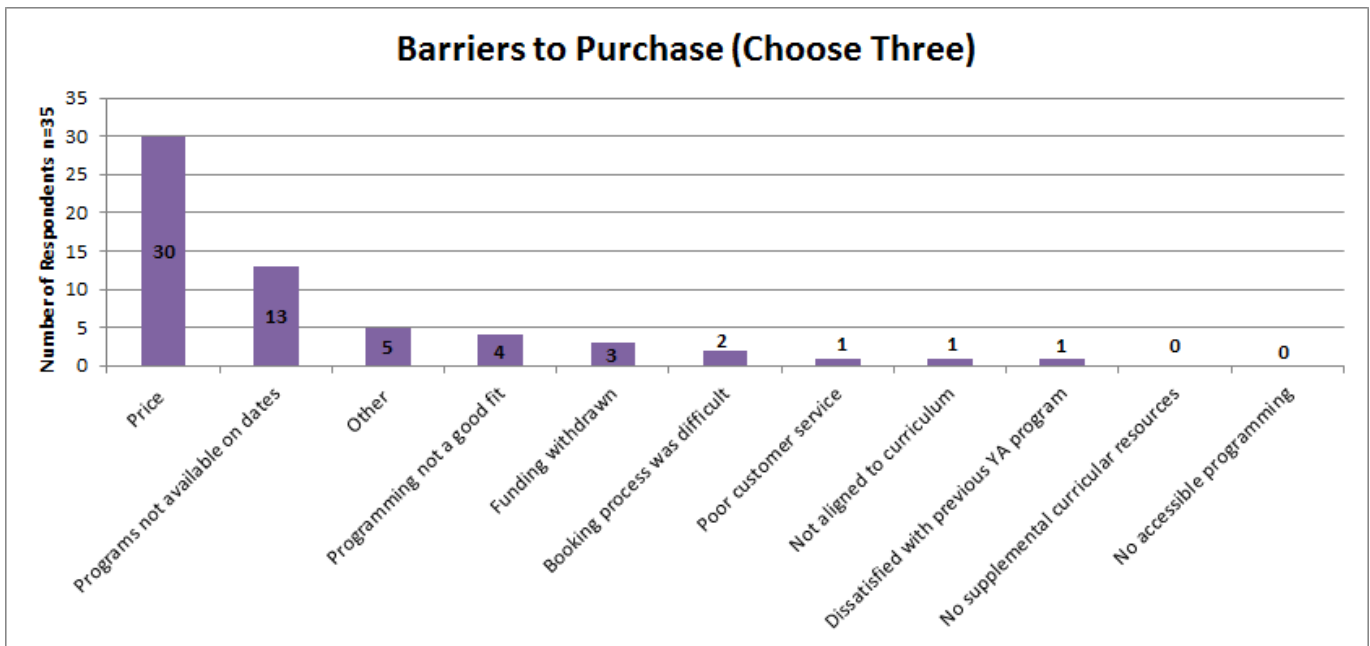


Figure 12

Recommendations:

- RZ will ask interviewees if they chose alternatives to YANJEP, and what the pricing difference was.
- YANJEP might want to look into new pricing structures for clients on a tighter budget.
- In the comments in questions 19 and 20 there were three specific concerns that YANJEP might want to address directly since the respondents gave permission to contact them. Two were complaints about performers, another was a concern that the catalogue has not been received.

6. Who/what are YANJEP's competitors? What alternatives were considered in the purchasing process? What are the qualities of YANJEP that set them apart from the rest, and make clients choose YANJEP? What do clients like/dislike about the booking process and the programming?

As for perceived benefits of YANJEP, the organization has high marks across the board, and there was even general satisfaction regarding price, as seen in Figure 13.

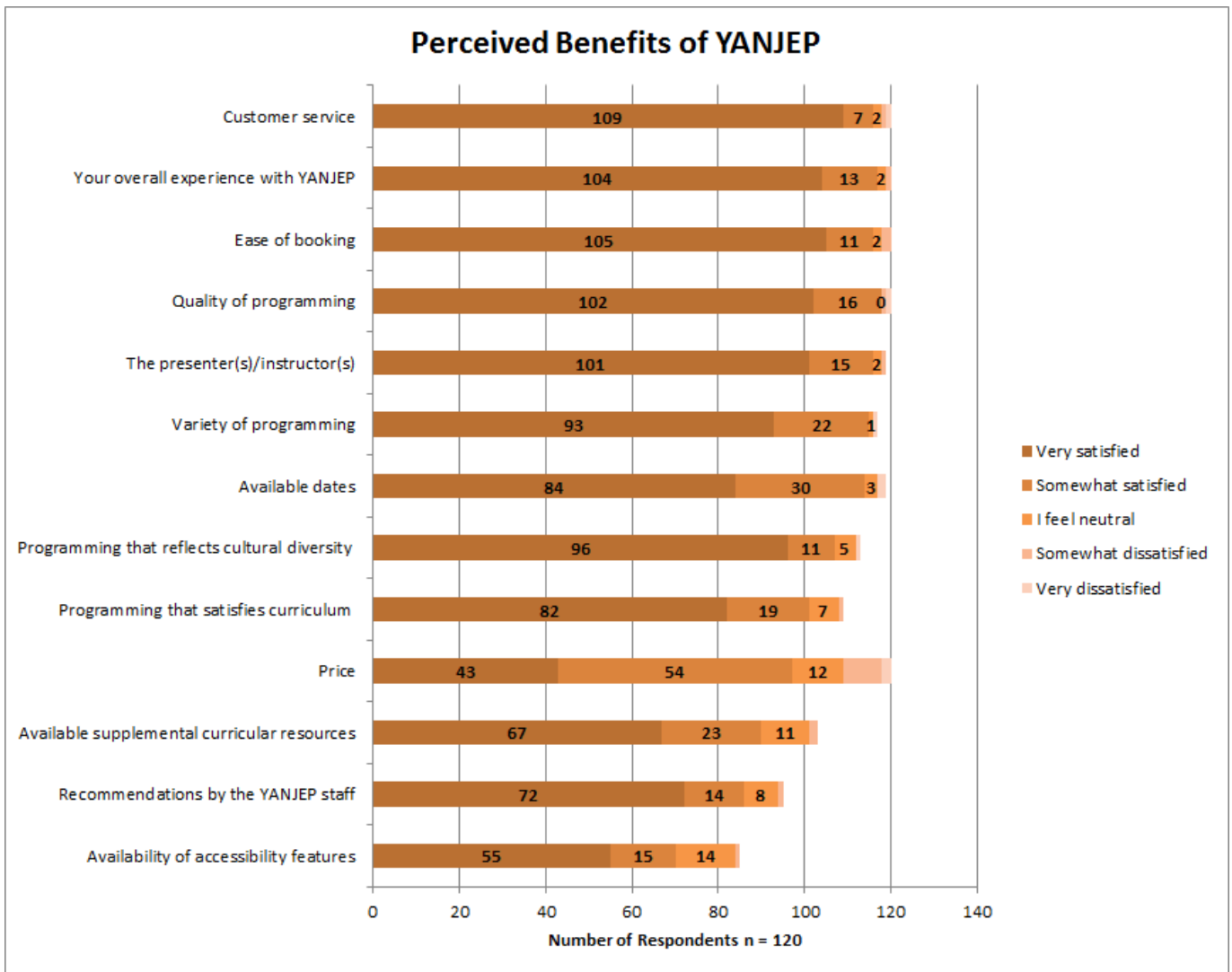


Figure 13

Recommendations:

- Competitors and competing factors will be explored in the interviews.
- No one factor pops out in terms of main benefits of working with YANJEP, so I would recommend focusing on the insights about diversity shown in Figure 8.
- RZ will dig deeper into clients’ perceptions of the booking process during the interview phase.

7. How do clients hear about YANJEP? Are there hidden markets that YANJEP has not yet tapped? Or is the field saturated?

Respondents were given a list of different media and asked to select all the ways in which they have heard about YANJEP. As Figure 14 shows, “Word of mouth from within the school or organization” and “The YANJEP catalogue” have the most effective reach. The vehicles and media listed by respondents who chose “Other” corroborated the other answer options: referrals, showcases, and having a long history with YANJEP were mentioned most often.

The interesting thing about these responses is that although this was a “select all that apply” question, there were only 213 selections made among 120 individuals, which means most chose just one or two media. This suggests that very few touchpoints are necessary before deciding to book an event: most often only one or two. Also note that marks are low for the methods whereby non-customers discover YANJEP, such as Internet search, inter-organizational word of mouth, direct mail, social media, and external links.

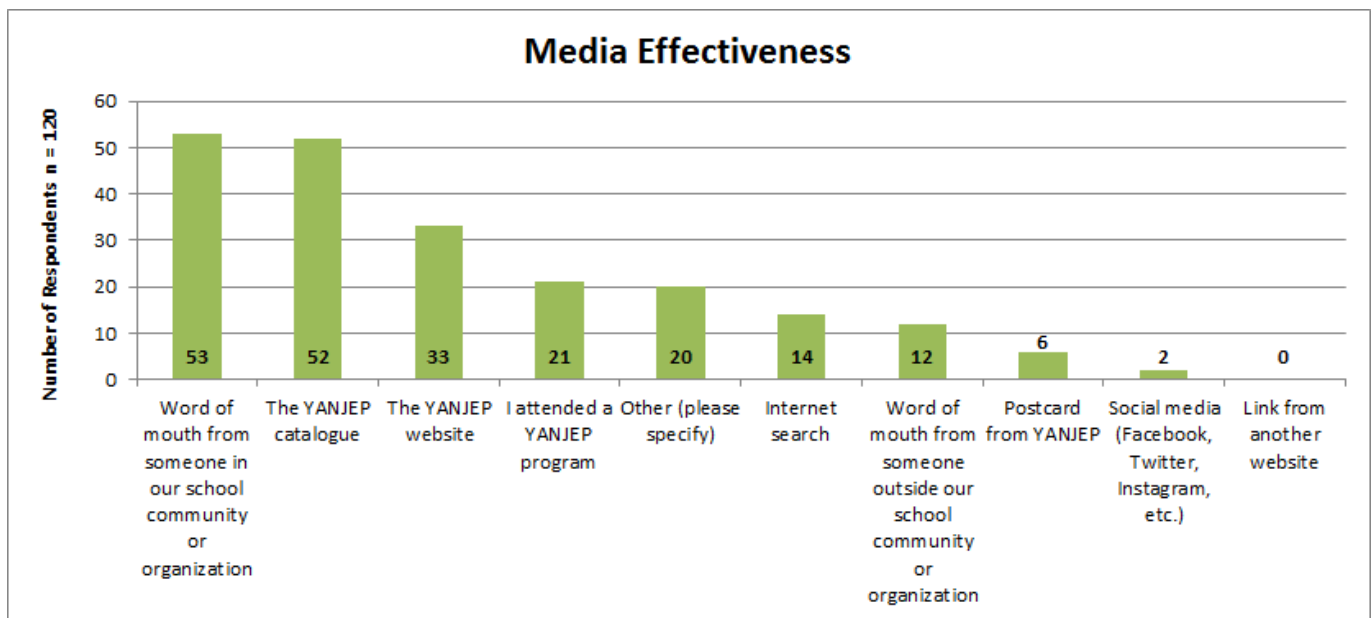


Figure 14

Recommendations:

- When developing communications, YANJEP should be mindful that the viewer is likely to make his/her decision on the spot, and therefore there must be a direct and clear path to purchase. This

might mean sending not one but three or four catalogues to administrators and educators, encouraging them to distribute them to their colleagues. Phone number and website booking page should be prominent on every page of the catalogue. Contact information should be prominent on every webpage as well as “Book Now” buttons,, and instructors/performers should visit a school with a stack of cards or flyers for teachers and administrators.

- RZ will explore through interviews how YANJEP might penetrate markets outside existing circles.

CONCLUSIONS FROM SURVEY

YANJEP has a strong seal of approval from its clients, and the main concern among lapsed clients is that the cost of its programming is prohibitive. YANJEP should explore alternative pricing options. As it seems the number of arts assemblies and residencies has been generally increasing or remaining the same, and customer satisfaction is high, YANJEP should explore offering programming in other areas where the demand is growing, such as STEM. Also, with many schools and organizations stating that diversity is a factor they look for when they book assemblies and workshops, YANJEP should ensure that diversity continues to be reflected in its programming, staff, and communications. Lastly, since communications within existing circles have been more effective than communications to new markets, Phase II will focus on discovering where those new markets are and how to reach them effectively.