

Building Demand for the Performing Arts

A Seminar for the Madison
Arts Community

Thursday, March 14, 2013

Alan Brown, Principal, WolfBrown
Duncan Webb and Carrie Blake, Webb
Management Services

wolf
brown



Agenda for the Day

- | | |
|-------|--|
| 10:00 | Trends in Arts Engagement |
| 12:15 | Lunch Break |
| 1:00 | Approaches to Building Demand |
| 2:30 | Small Group Discussions on Key Topics
for Madison |
| 4:30 | Small Group Report-outs |
| 5:00 | Wrap-up |
| 5:30 | Public Meeting and Keynote |

Trends in Arts Engagement



City of Madison Performing Arts Study

Thursday, March 14, 2013

Alan Brown, Principal, WolfBrown



Based on your own experience, what would you say are the most important trends shaping demand for arts programs?



Part 1: The Changing Cultural Climate

Trends in Arts Engagement: Madison, Wisconsin

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Planet Calypso takes the MMORPG genre to an exciting new level. With **No Subscription Fees**, you can [Download the Free Software](#) now, and join a real economic action-adventure as a human colonist on a distant alien world

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Latest News

05 January 2011

Congratulations to new estate owners

Congratulations to Qetesh for winning the auction on Medusa's Head! FPC wishes him and his investors the best of luck with its future.

[read more>>](#)

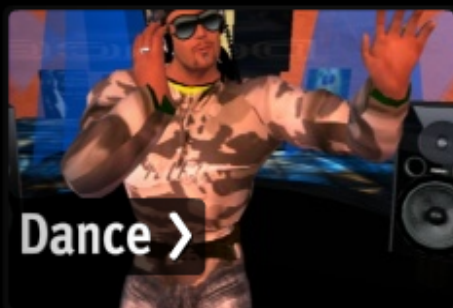
04 January 2011

Merry Mayhem 2010 Final Scores

Here are the final scores of Merry Mayhem 2010! Note that if a Mayhem participant is not on the lists, he or she has been disqualified for either chipping when not allowed to, or...

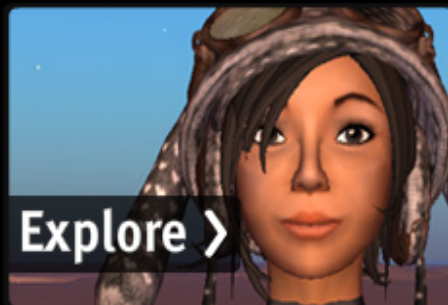
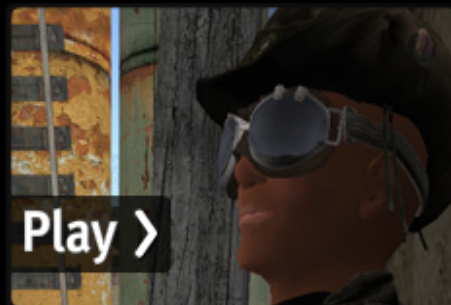
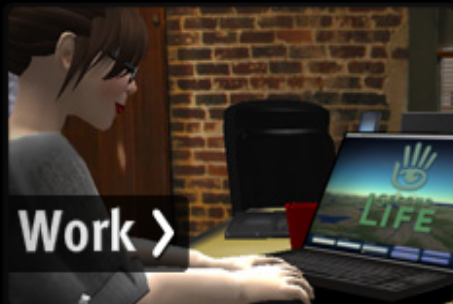
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ALL CAMS

AMANDA'S ROOM

BEN'S ROOM

ENTRY & HALLWAYS

GAME ROOM

KITCHEN & PATIO

LIVING ROOM

THE BLUE ROOM



56°F

9:21pm

Amanda & Justin have a live interview with NBC San Diego.



See Kara's [other talents](#).



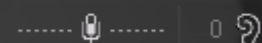
Right now Giggianne is at the Dream Studio train



eLounge

Press Escape to see your mouse cursor

F1 - Help



eLounge

Welcome to the Lenovo eLounge - Explore our wide range of notebooks in our virtual test-drive environment

Experience a truly virtual 3D on-line shopping experience. Ask your friends to join you, and together explore and learn about lenovo products. It is similar to shopping in a retail store except you are on-line and in control of your real time interactive shopping experience.

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outside the bedroom

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The Online Camera Phone Scavenger Hunt

Real Name: Screen Name: E-Mail Address: Cell Phone#: Cell Provider:

JOIN THE HUNT

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The “Gamification” of entertainment

- Blurring lines between fantasy and reality, fiction and fact
 - Online personas, imaginary online communities
 - Reality TV is the new fiction
 - The hyper-marketing of celebrity culture
 - Psychology of random reward (gambling, online dating)
- Rise of gaming as a legitimate form of entertainment
 - The ultimate fantasy/entertainment destination: Las Vegas
 - “Massively multi-player online role playing games”
- Backlash: Search for authenticity, realness
 - Can cultural programs and facilities become intermediary spaces where the virtual and real worlds meet?

Demand for more sensory stimulation

- Younger consumers are acclimated to multi-sensory engagement
 - Watching, hearing and reading simultaneously
- Emergence of lighting as a popular art form
- Experience learning, interactivity and edutainment
- Higher satisfaction thresholds
 - Expectation for immediate rewards and validation



Sydney Symphony





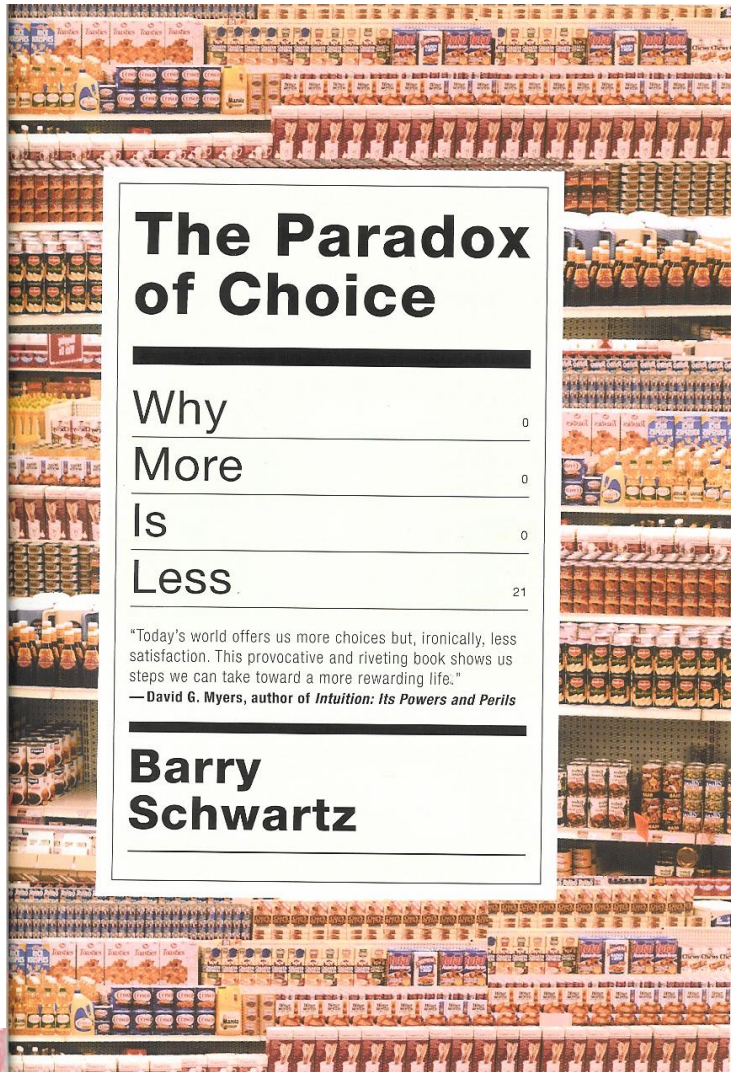
2008 Opening Ceremonies



The image features several abstract, three-dimensional geometric shapes in shades of purple and blue. These shapes, which resemble elongated, faceted crystals or shards, are arranged in a cluster on the right side of the frame. They are set against a dark, almost black background, with a subtle gradient of brownish-orange light visible along the bottom edge. The lighting creates highlights and shadows on the facets of the shapes, giving them a sense of depth and volume.

Pieris Music, Philadelphia

Proliferation of Choice



Proliferation of Choice

- Overwhelming number of leisure options in some markets
 - Glut of information about options
- Challenges our cognitive abilities
 - Cognitive chunking is the brain's response
 - Decision paralysis is likely
- Particularly troubling for arts groups with many diverse program offerings
- Implies greater need for “filters”
 - Unbiased recommendations, “guide to use”

"I was both thrilled and horrified to be asked to devise 'my own' series for this season's brochure. Thrilled to be given a platform to share my enthusiasm about some of the artists included in our upcoming season; horrified because it is almost impossible to decide. Everything included in any UMS season is there for an important reason. Like everyone, I have a special affinity with some artists and forms that, because of who I am, resonate for me personally. It goes without saying that my personal preferences in no way bestow special meaning. Instead, they are simply those events that I get excited about. Below is my 07/08 'Michael Kondziolka Series' — the events which I will insist that my friends travel to Ann Arbor to experience... along with some of my own musings and thoughts."

Michael Kondziolka
UMS Director of Programming



Michael's Picks

Direct-to-Consumer: www.eventbrite.com



Event registration online

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“Thanks
for making my event a success.”
- Jay R.

1

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post events

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you **spread the
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- Oct 5, 2007 [Community Next Platform - Build It](#)
Stanford, CA
- Oct 7, 2007 [Graphing Social Patterns:](#)
San Jose, California
- Nov 14, 2007 [NewTeeVee Live: Television Reinvented](#)
San Francisco, CA

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Diffusion of Cultural Tastes

- Fragmentation and diversification of tastes, both narrowing and broadening
 - Cross-cultural influences
- Enabled by advances in technology
 - Global distribution at the speed of light
 - Witness the impact of the download phenomenon on music preferences worldwide
- The net effect is rapid aesthetic development
 - More people enjoy more different kinds of art

Definitional Boundaries Around the Art Forms have Blurred

NEA: What was the last “classical music” concert that you attended?

DISCIPLINE	NAME OF PERFORMANCE/PERFORMER
Classical Music	CHINESE COMMUNITY CELEBRATION IN SF BAY AREA
Classical Music	TITO PUENTES
Classical Music	MUSIC IN THE MOUNTAINS, PAUL PERRY DIRECTOR
Classical Music	THE MUSIC MAN
Classical Music	MASTERWORK CHORAL
Classical Music	RUSSIAN CLASSICAL MALE SINGER
Classical Music	MOOREHOUSE COLLEGE AND SPELLMAN COLLEGE
Classical Music	PACIFIC OPERA HOUSE
Classical Music	COMMUNITY BAND FOR THE ELDERLY
Classical Music	THE STOMPERS
Classical Music	SHOWBOAT WITH TOM BOSLEY
Classical Music	ENGLISH CHOIR GROUP -- ABBEY SINGERS
Classical Music	CHURCH ORGAN PERFORMANCE
Classical Music	AN EVENING OF OPERA, PAUL PLISHKA
Classical Music	KING AND I
Classical Music	OLIVER
Classical Music	PIANO RECITAL
Classical Music	CHRISTMAS MUSIC
Classical Music	ORGAN RECITAL, BACH PRIMARILY

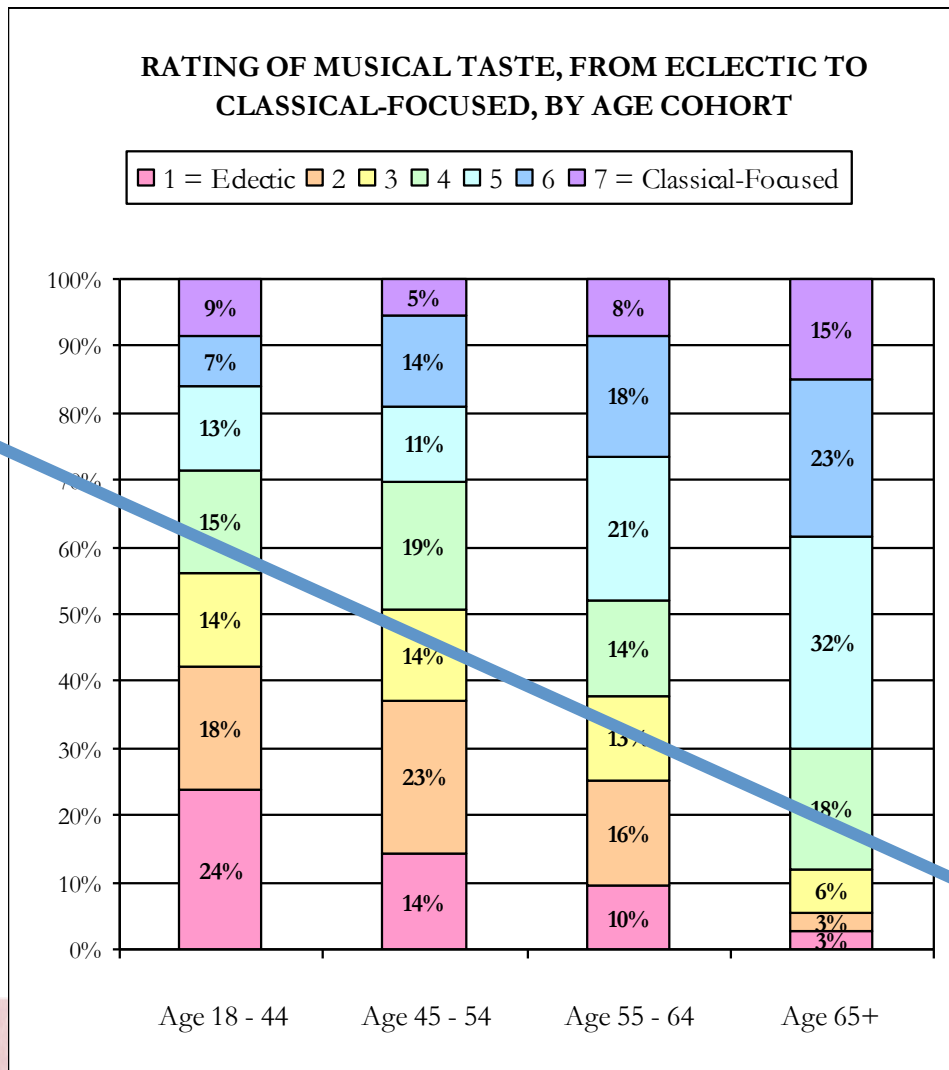
NEA: What was the last “opera” that you attended?

DISCIPLINE	NAME OF PERFORMANCE/PERFORMER
Opera	LUCIA DI LAMERMOOR
Opera	LA BOHEME
Opera	LES MIZ AND PHANTOM OF THE OPERA
Opera	BRIGADOON
Opera	CINDERELLA
Opera	PHANTOM OF THE OPERA
Opera	PHANTOM OF THE OPERA
Opera	MADAME BUTTERFLY
Opera	PHANTOM OF THE OPERA
Opera	I PURITANI
Opera	IT WAS ON BROADWAY
Opera	PHANTOM OF THE OPERA
Opera	FAUST
Source: NEA 1997 Surey of Public Participation in the Arts	
Verbatim responses to open-ended questions	
Excerpts only	

Definitional Boundaries Around the Art Forms have Blurred

- Consumers experience art along a continuum from “popular” to “high art”
 - What is dance?
 - What is classical music?
 - Whose definition matters?
- Rapid “remixing” of art, re-purposing of content
 - Slash fiction
- Consumers don’t put us in the boxes we put ourselves into
- Decreasing relevance of institutions that use a narrow or rigid definition of art

What is a long-term strategic response to growing eclecticism?





**Concerto for Turntable, with DJ Radar at
Carnegie Hall, Oct. 2, 2005**

Evolution of Cultural Norms

- From “snob” to “omnivore”
 - Richard Peterson, Vanderbilt University
- Shift in ideal: from fine arts sophisticate to world cultural citizen
 - A new kind of cosmopolitanism
 - Desire to make sense of the complicated world we live in
- Increased access to the art and artists of diverse cultures
- Inevitable move towards one highly interconnected mosaic of global cultures



Part 2: Changing Consumer Behaviors

Trends in Arts Engagement: Madison, Wisconsin

Shortened planning horizons

- Decline of advance commitment
 - Exceptions are highly desirable products, when scarcity is an issue
- Evidenced in later and later sales patterns for arts presenters
 - This trend is inconsistent with subscription marketing
- Increased premium on flexibility, as lives get more complicated
 - Keeping options open until the last minute; enabled by the availability of “perfect information”
 - Will people pay a premium for buying late?

Some consumers don't want to play the hierarchy game

- Each cultural institution values its biggest spenders/donors the most; perks abound
 - But more and more younger consumers don't want to play the hierarchy game
- Not everyone wants to “get married”
 - Can we just date?
- How can we facilitate and encourage infrequent use and late buying?
 - Cooperative marketing solutions are implied

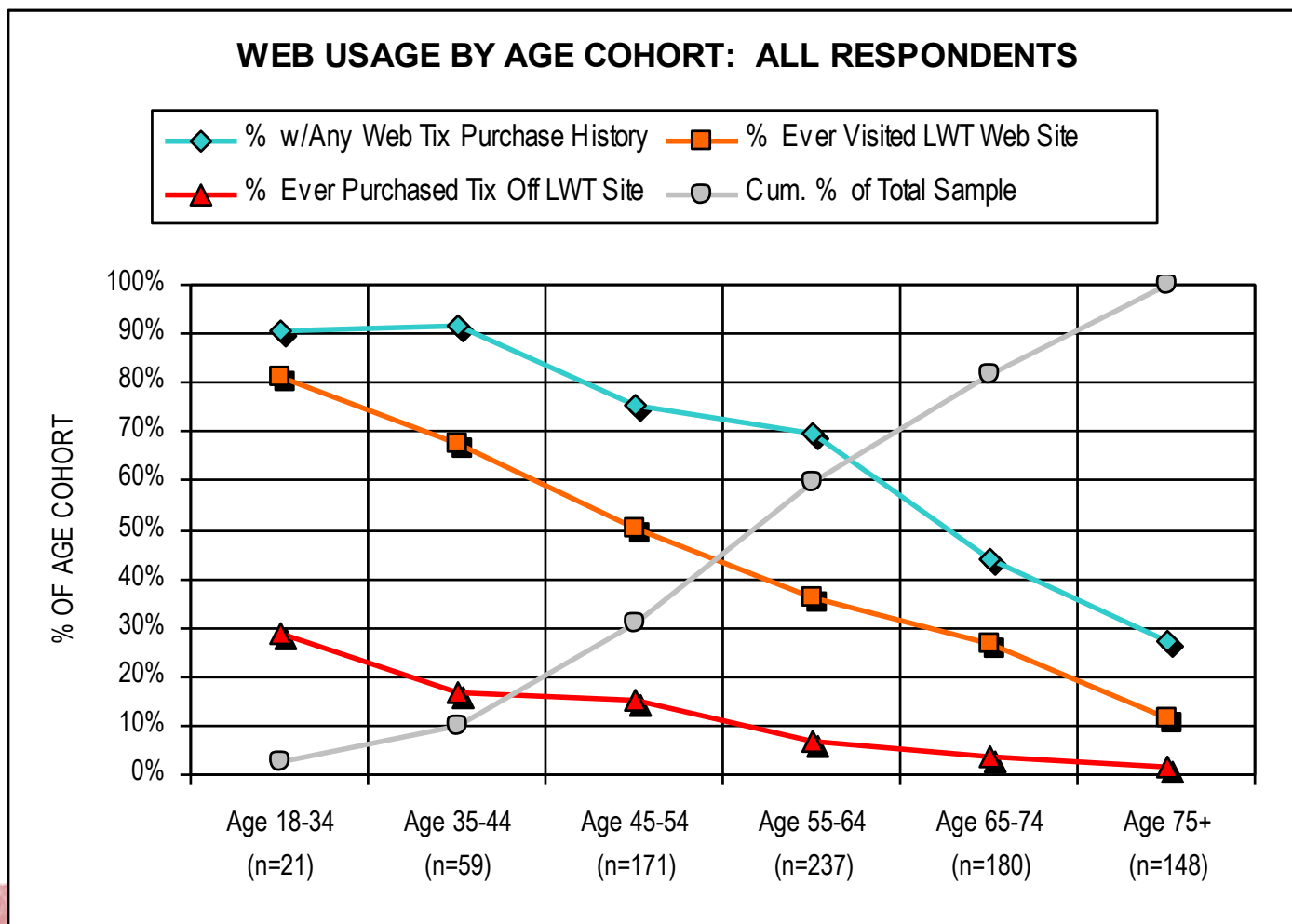
Increased demand for convenience

- Low threshold for opting out
 - **Attractive, convenient alternatives**
- Less willingness to drive, fight traffic
 - **More at-home entertainment options**
- Slow shift in population away from arts facilities in urban centers
- One response is venue diversification
- Looking forward, the challenge is being relevant to people in a range of settings

The new calculus of risk and reward

- Less willingness to take risks, more willingness to pay large sums for a guaranteed “home run” experience
 - Evidenced by blockbuster phenomenon
 - Super-premium price points on Broadway
- Consistent with a pervasive trend towards “trading up”
- The rise of VIP culture or “the massification of luxury”
 - Creating the reality or illusion of exclusivity, status, prestige
 - The more everything becomes accessible, the more some people want to be separate
- Suggests demand for value-added, premium arts experiences

Migration toward electronic info. acquisition



Increased reliance on word-of-mouth

- Lower consumption of traditional media
 - Fragmentation of the media
 - Proliferation of personal communications technologies
- Reaction to glut of information: hunger for “unbiased” filters
 - Absence of the critical voice in many markets
- Proliferation of online Word-of-Mouth tools
 - Peer-to-peer and viral marketing tactics
 - Online invitation tools, ticketing systems that integrate with Facebook; mobile apps



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Cleveland
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Artists

Arts Orgs.



Concert Calendar

Track your concert
attendance

Learn More

Sign Up for
your FREE
account!

Sign Up



Classical
Fans



Fan
Alerts



Concert
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62,985 Concert Listings

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Composers

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Ensembles

Presenters

Huge push to figure out how to use social media to drive attendance

- Proliferation of online social spaces
 - Facebook.com MySpace.com, Twitter, Friendster.com, Care2Connect.com, CrowdFactory.com, Tribe.net, LinkedIn.com, Gather.com
- Still a new frontier for the arts sector
- Concurrent rise in real life social networks
 - Book clubs, film clubs, play groups
 - The Cellular Church (Malcolm Gladwell)



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a Meetup Group

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English

The Lakeshore Stitch 'n Bitch Group

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Organized by



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Groups



Welcome, Oakland Knitters and Crocheters!

Location

Oakland, CA

Meetups

16 so far

Members

78 fiber artists

Rating



Meetup topics

Crochet, Knitting, Sewing,
Needlework

Founded

January 13, 2009



Meet fellow Crocheters and Knitters in the area! Fiber artists of all skill levels are invited for a cup of tea, a friendly conversation, and plenty of support and help with their work. Every tuesday night from roughly 7:00 to 10:00 p.m. at L'Amx tea bar on Lakeshore Avenue in Oakland. Come and knit or crochet with us! Feel free to come and stay as early or late as you like! Hope to see you there!

Join The Lakeshore Stitch 'n Bitch Group

You'll get invited to our Meetups as soon as they're scheduled!

Name:

Email:

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☐ I agree to the [Terms of Service](#)

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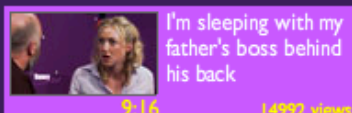
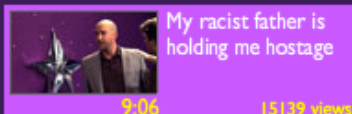
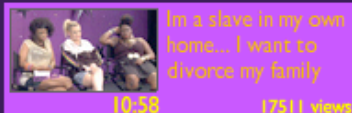
[What's Meetup?](#)

Our next Meetup

The Lakeshore Stitch 'n Bitch Group Meetup



Royal Opera House viral campaign, Nov. 2010, www.dannyknowsbest.com



Use these buttons to join in with the audience:

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SECURITY!

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[The Reddit/JetBlue/Kickstarter Challenge](#)

posted 2 days ago



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Allison Weiss makes a full-length record!

by [Allison Weiss](#)

What started as a dream has become a reality! I'm making a full length album, and it's the FINAL COUNTDOWN! Click for info, help me reach a new goal!

\$7,711.16 PLEDGED

386% FUNDED

SUCCESSFUL

FUND PROJECTS

Allison Weiss used Kickstarter to fund her new EP directly from her friends and fans. They supported Allison with cash, and she's rewarding them with cool stuff and behind-the-scenes updates.



Wedding Chapel

by [Grand Opening](#)

Wedding Chapel will marry loving couples at the Grand Opening storefront in Manhattan's Lower East Side -- It's Vegas, the New York way!

\$3,094 PLEDGED

103% FUNDED

SUCCESSFUL

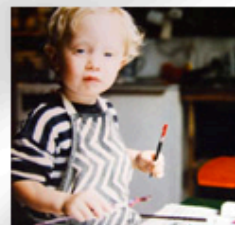
TEST CONCEPTS

Grand Opening wanted to convert their gallery into a pop-up wedding chapel for the summer, but first they needed to ensure there was enough demand. Using Kickstarter, they pre-sold weddings, t-shirts and sponsorships, and completely eliminated their financial risk.

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Leo Critchley
supports new art

Because we believe that **everyone** should
have the chance to support great **art** and be
rewarded for it

And that if they do so, the arts will become **stronger**
and more open

We will build a popular movement to support and
transform the UK arts sector; a new **alliance**
between artists and their audiences to take control of
arts funding.

Growing awareness that social context drives arts attendance

- Who do I want to spend time with?
- Absence of social context is a major barrier to participation
 - e.g., 'spousal taste discordance,' new to the area
- People construct all sorts of social groups around arts experiences
 - Groups of co-workers, college alumni groups, church groups, small family groups, friendship groups
- Initiators and Responders: new emphasis on personal, direct selling



Part 3: Changing Patterns of Participation

Trends in Arts Engagement: Madison, Wisconsin

The rise of personal creative expression

- The tools of everyday creativity: the living arts
 - Gardening, cooking, decorating oneself, designing attractive living spaces, collecting art and objects, writing letters and diaries
- Mostly self-directed, home-based
- Add to this the user-generated content phenomenon
 - CafePress.com: “Shop, sell or create what’s on your mind”
 - Flickr.com: “Store, search, and share your photos”
 - YouTube.com: “Broadcast yourself”
 - GarageBand music composition software
- Off the radar map of most funders and arts institutions
 - A giant value disconnect

Trend towards more customized experiences

- Deeply embedded in today's consumer environment
 - “Mass customization” or the “one-to-one future” in which every consumer gets unique treatment
- A generation of consumers is accustomed to getting what they want, when they want it, where they want it
 - iTunes, Netflix, TiVo, digital cable, satellite radio
- Meanwhile, we are selling fixed experiences at fixed times, at venues with fixed seating





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Enter your postal address, which the site will remember when you return to make a purchase.

Welcome back.

Your user name is:

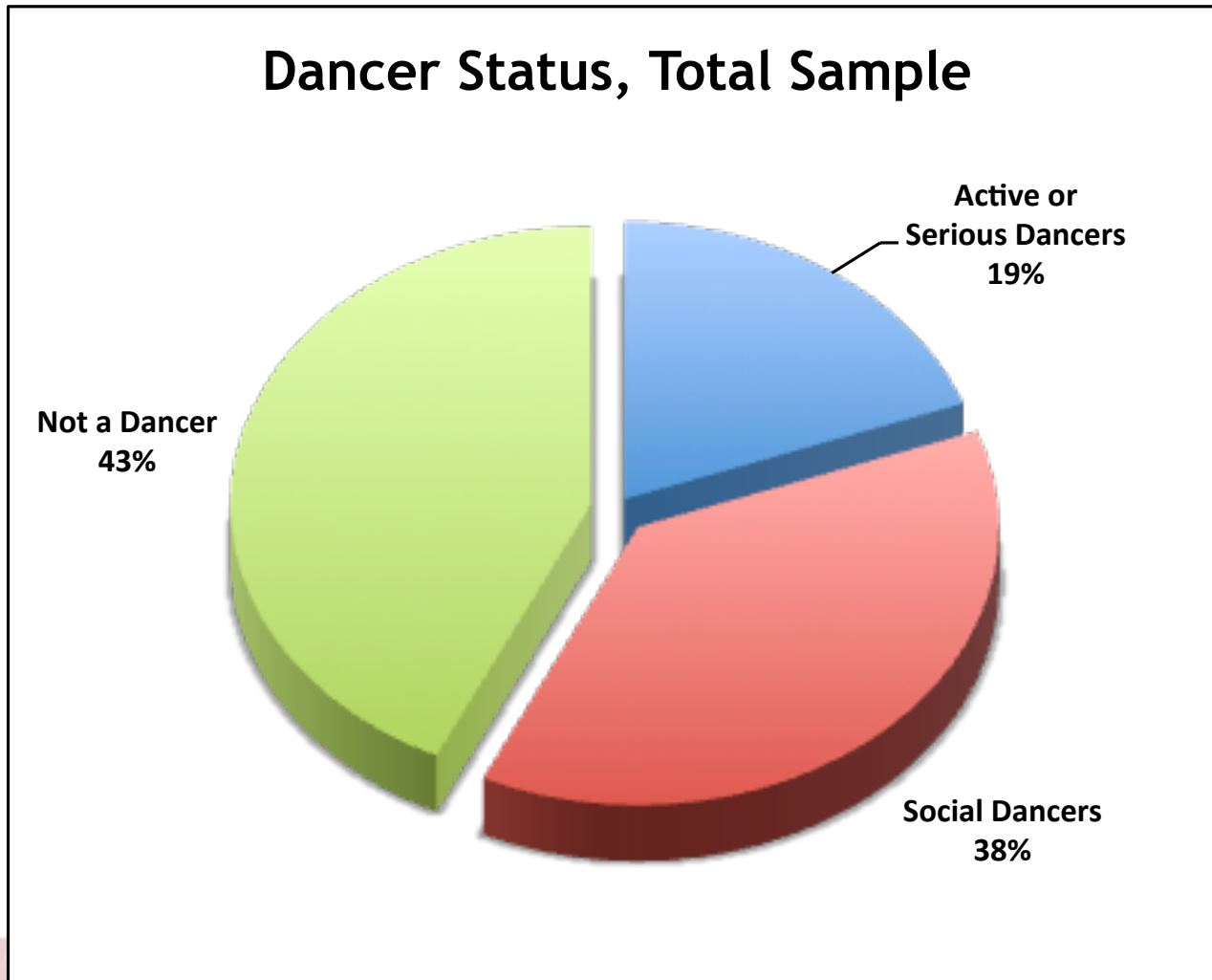
Alan Brown



More demand for active engagement opportunities

- Consumers are demanding shorter, more intense, more meaningful experiences
 - We are entertaining a generation of experience learners
- Evidenced in higher rates of “personal participation”
 - The rise in amateur art making, art collecting (e.g., home-made music recordings)
 - Part of the “Pro-Am Revolution” (i.e., professional amateurs such as bloggers, astronomers, singers)

Six in ten dance audience members are dancers (Nat'l study, 2011)



Shift towards interpretation-rich arts experiences

- Overall trend towards interactivity, contextualization and “experience enhancement”
 - Slow, fitful field-wide innovation process
 - Much, much experimentation going on
- Efforts to improve “readiness to receive” the art
 - Martha Graham company - introductory videos
 - Advance mailing of program notes, synopses
- Embedded interpretation
 - Audio guide content on cell phones
 - Supertitles at the Opera; audio descriptions for the “unblind”
 - Concert Companion at classical music concerts

Growing importance of “setting”

- Desire to work at large scale
- Need to accommodate artistic work that defies categorization
- Increased use of found spaces that make a special connection with the artistic work
- Growing need to facilitate social interaction
- Growing need to offer choices in terms of seating comfort, mobility, degree of socializing
- Desire to break the rigid formality of certain art forms in order to appeal to new audiences

The art space



Hovering at the intersection of art and entertainment





The art space



BROOKLYN LYCEUM





The Culture of Instant Feedback

- Consumers are more and more accustomed to being asked for feedback on everything
- Entire business models in the commercial sector are based on customer feedback (e.g., Amazon)
- Social networking sites serve as real-time feedback mechanisms
- Arts groups are just beginning to discover the power of instantaneous feedback

Integrating Audience Feedback with New Work Development: BAC, Battersea



BAC will play host to dozens of our favourite artists as they develop new work in every corner of the building. Scratches are new theatrical ideas developed by artists and shaped by audience feedback. Individual Scratches happen at BAC throughout the year and the Scratch Festival is a celebration of Scratch, with loads of Scratches on during a three week period.

The best way to enjoy Scratch Festival is to see more than one show in a night. The Scratches are short enough that you won't have to worry about getting hungry half way through or your bottom going numb from being sat down for too long!

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Brian Dickie, General Director

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2010 PEOPLE'S OPERA: VOTE VERDI!
Which Verdi opera will be presented in the 2012-13 Season? You decide by voting with your dollars!

I DUE FOSCARI I MASNADIERI GIOVANNA D'ARCO

**RECEIVE 5 BONUS
VOTES FOR EVERY \$25!**

**HURRY, VOTING ENDS
JUNE 11!**



Chicago Opera Theater lets you, the people, decide one of the operas in the 2012-13 Season. Cast your vote(s) for merely a dollar and the opera that receives the most "votes" is the one Chicago Opera Theater will produce! **The first \$16,000 worth of votes will be matched by an anonymous donor which doubles your voting power!**

For our third annual contest, COT is thrilled to announce that the "People's Opera" will mark the Bicentenary of Giuseppe Verdi's birth. General Director Brian Dickie has picked three underproduced yet unforgettable Verdi operas for which the public may cast their vote.

Hurry! Voting ends June 11th, 2010!

[Click here for the current People's Opera Standings!](#)

I due Foscari (The Two Foscari)

Condemned to live in exile after a false accusation of murder, Jacopo is caught illegally reentering Venice. His father, the Duke, is forced to make an impossible choice between country and family. What will happen when the bonds of family are ripped apart by the teeth of the law? This age old struggle is at the center of this rarely performed Verdi masterpiece.

[Listen to a clip](#)

\$ Amount

Audience as Co-Author of Meaning



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Art Mobs to Remix MoMA (With Your Help)

Art Mobs returns with a new project. Last year we hosted a gallery event at Marymount Manhattan College. Now we're focusing our attention on the [Museum of Modern Art](#). We've produced (unofficial) audio guides for MoMA, and we're making them available as [podcasts](#). We'd love for you to join in by sending us your own MoMA audio guides, which we'll gladly add to our podcast feed. Why should audio guides be proprietary? Help us hack the gallery experience, help us remix MoMA!

STUDENTS

[Cheryl Stoeber](#)

[Albert Rodriguez](#)

[Jean R.](#)

[Jessica Paul](#)

[Liza Pastore](#)

[Laura L.](#)

[Tony G.](#)

[Sasha Giglio](#)

The background of the slide is an abstract composition. It features several overlapping circles in various shades of red and white. A prominent, thick, textured red band curves across the upper left portion of the frame. The overall aesthetic is modern and graphic.

Concluding Thoughts

The Shifting Sands of Demand: Trends in Cultural Participation

Review of Key Trends

- Rapid diffusion of musical tastes
- Filters help people make choices
- Importance of social context
- Improving “readiness to receive” and managing the total customer experience
- Giving customers more choices to make
- Engagement, experience enhancement, intensity
- Making connections to personal creativity at home and at work

About the Speaker



Alan Brown is a leading researcher and management consultant in the nonprofit arts industry. His work focuses on understanding consumer demand for cultural experiences and helping cultural institutions, foundations and agencies see new opportunities, make informed decisions and respond to changing conditions. His studies have introduced new vocabulary to the lexicon of cultural participation and propelled the field towards a clearer view of the rapidly changing cultural landscape.

For 2010-11, Alan's work will follow several veins. He is leading several multi-year evaluation and assessment projects funded by the Doris Duke Charitable Foundation, including the Creative Campus Innovations Grant Program administered by the Association of Performing Arts Presenters, Dance/USA's Engaging Dance Audiences program, and Nonprofit Finance Fund's Leading for the Future initiative. His work on assessing the intrinsic impacts of arts experiences continues to expand and evolve, most recently with the Liverpool Arts Regeneration Consortium in the U.K., which has commissioned a year-long impact assessment pilot program. In January 2010, Alan kicked off a major study of jazz audiences led by Jazz Arts Group of Columbus, Ohio, and a consortium of jazz presenters across the U.S. (also funded by Duke). During the 2010-11 season, he will be assisting the New World Symphony in evaluating several exciting new concert formats in advance of the opening of their new groundbreaking new concert hall designed by Frank Gehry.

Another focus of Alan's work is developing measurement systems that communities can use to reliably and repeatedly track levels of public engagement in culture, including the Philadelphia Cultural Engagement Index. With Dr. Dennie Palmer Wolf, he plans to continue developing new approaches to measuring the 'creative capital' of children, families, workers and whole communities.

Customer segmentation remains a major thrust of Alan's work, with recent studies for the Philadelphia Orchestra, Steppenwolf, Welsh National Opera, Pacific Symphony, South Coast Rep and the Major University Presenters consortium. He is presently working with other consultants to develop the next generation of marketing databases for the arts industry that will incorporate survey data as well as transaction data.

Alan serves in a volunteer capacity on the Research Advisory Council of the League of American Orchestras, and has served on the organizing committee of the National Arts Marketing Project annual conference since its inception. He speaks frequently at conferences in the U.S. and overseas. Prior to his consulting career, Alan served for five years as Executive Director of the Ann Arbor Summer Festival, where he presented Ella Fitzgerald, Sarah Vaughn and many other artists. He holds three degrees from the University of Michigan: a Master of Business Administration, a Master of Music in Arts Administration and a Bachelor of Musical Arts in vocal performance. Alan makes his home in San Francisco with a yellow Labrador Retriever named Golden Brown.