TESTING THE MARKETING MIX: ASSUMPTIONS, STRATEGY AND REALITY IN A MAJOR ARTS MARKET

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ABSTRACT

This study tests assumptions in the basic marketing mix among arts organizations in a major metropolitan region, in view of a key target audience. Among other elements, the paper explores the relationship between awareness about the existence of discounts for student tickets, student discretionary income and student attendance to cultural events in the Philadelphia area.

In many arts disciplines, a declining audience size means that the core group of supporters is weakening, without a younger audience stepping in to replace them. For many reasons, college students represent an ideal target market for the arts: they are (and will be) among the most highly-educated segment of the population; have significant socialization needs that arts organizations can satisfy, and represent the most likely boards, volunteers, supporters and audiences of tomorrow. This study provides insights into how the arts community might best direct its marketing efforts to target this key group most effectively.

arts marketing marketing mix college students strategic marketing
audience development

INTRODUCTION

This research seeks to understand a particular subset of young adult audiences, to assist arts organizations in better developing and focusing their marketing efforts to forge connections with it. For two consecutive years college and university students in nine Philadelphia-area universities were surveyed, seeking answers to questions about students' spending habits, ticket-buying preferences, social needs, and self-identification as artists, among many others.

The choice of college students as a focus of study is itself a result of assessing evidence. College students have the highest educational levels of the population, a factor that is naturally associated with higher arts attendance. This does not mean, however, that college students are automatically pre-disposed to attend arts events, either during their college years or post graduation. In fact, the low degree of student discount usage reported by many arts organizations is an indicator that there is no guaranteed correlation. The conundrum, then, is why, if students do represent the most likely case of arts attendees and future supporters, aren't they much more involved in arts organizations, as patrons or as volunteers?

Philadelphia is an ideal setting for a study such as this as it boasts a very rich cultural scene, a great number of universities and colleges, easily accessible arts offerings (both from a geographic and financial standpoint). Yet many arts organizations in the city report, once again, very low student ticket usage or visitation. The puzzle then broadens.

The "most likely suspect" rationale for targeting college audiences was accompanied in this study by the preoccupation with maximizing the often meager resources arts organizations have at their disposal to establish a new patron base. In this sense, college audiences are also a worthwhile segment to focus on. Again, being part of the most highly educated sector of the population, they will, upon graduation, be among the highest paid. There will often be a natural affinity between financial support for the arts and their professional careers (business, law, medicine, engineering, to name a few), even though these will not be arts careers themselves.

The college students of today are tomorrow's art organizations' board members, patrons, funders, supporters, subscribers and members, consultants, and even directors. It would make sense, then, to cast the marketing net wide among this under-tapped audience. In an extensive review of arts organizations this study found that although many have an interest in this segment, they offer few incentives beyond singles' nights, discount tickets, and direct (yet loosely structured) tie-ins to academic disciplines (departments of performing arts are on theatre mailing lists, for example, but the same is rarely true for contract law, materials engineering, political science, etc.). Is there evidence that the college student audience can be tapped more broadly? This is what this study set out to discover.

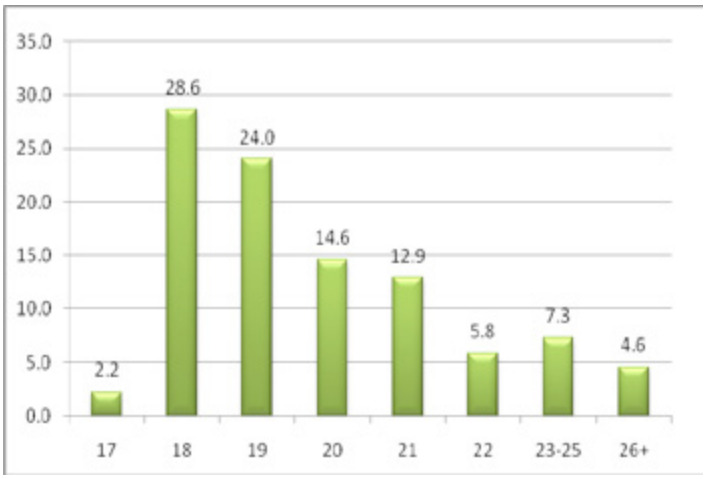
THE STUDY

In two consecutive years, and in conjunction with a marketing research curriculum, surveys were distributed to students from nine universities and colleges in the Philadelphia region. The two surveys were the broadest and in-depth studies to specifically target the college student demographic ever conducted in Philadelphia, and a pioneering study in the United States. The survey questions were designed to assess barriers to college student attendance at arts events, student knowledge of existing incentives such as discounted tickets, and the degree of interest in arts participation existing in the target

audience. In order to obtain a clear a picture as possible of the target audience, the survey also included questions about childhood exposure to the arts, and social habits.

Over 850 students[1] from nine area universities and colleges[2] were surveyed. They were chosen to represent a representative sample in terms of ownership (public and private), size (large, medium, small), majors, and locations (urban, suburban). Respondents ranged in age from 17 to 45, although most were in the 18-21 age range (Figure 1). The great majority of those surveyed were freshmen (35%) and sophomores (23.9%), but the sample also included juniors (16%), seniors (17.5) and graduate students (7.5%).

FIGURE 1: AGE OF RESPONDENTS (%)



1 A total of 858 surveys were collected but of these only 850 had complete data.
2 Bryn Mawr College, Drexel University, Haverford College, LaSalle University, Philadelphia University, St. Joseph's University, Temple University, University of Pennsylvania and University of the Arts.

Somewhat more women (59%) than men were surveyed (41%), but both populations were large enough to allow for analysis. The age range of respondents is presented in Figure 1. Most of the students appeared to be either unemployed (47.3%) or employed part time (40%). Full time employment
accounted for only 5.7% of all responses (these numbers held for males and females). Majors ranged from Communications to Finance, Political Science to Interior Design, Chemistry to Accounting.

Assumptions in Arts Organizations about College Audiences
Audience development refers to the identification, cultivation and construction of a sustainable base of supporters (including ticket buyers, subscription holders, funders, and volunteers) at an arts organization.

The topic of audience development is crucial to arts managers for at least three reasons:
1) Although it could be argued that art is not necessarily created for an audience, arts organizations rely on audiences for their survival. Without external audiences such as patrons and donors the organization they organization can't reach *financial* sustainability. Without internal audiences such as volunteers nonprofit arts organizations would find it difficult to have *operational* sustainability.
2) The expanding and changing mandates of arts organizations, particularly since the late 1980s (with greater emphasis in the 1990s), require arts organizations to think about both expanding and diversifying their audiences, if they are to be *socially* sustainable.
3) Changing lifestyles, demographics, technology, education and the arts; all of these have an impact on traditional arts audiences, and on how future audiences emerge. Arts organizations need to be cognizant of these changes and their impacts in order to remain *culturally* sustainable.

Many efforts to ensure this financial, operational, social and cultural sustainability have focused on two broad groups: children and non-traditional audiences. First, arts organizations and major funders have put considerable effort into developing arts education and outreach programs, to counter the effects of declining arts funding in the schools. Second, diversity at all levels has become a prime concern, as board and audience members are cultivated outside the traditional arts audience streams. The first group focuses on children, their teachers and, to some extent, their parents, while the second tends to look more towards youths (defined loosely as between 14 and 20 years of age), and professionals or community leaders.

This is not to say that arts organizations have forgotten about people who do not fit in either of these categories or in the traditional audience category. In fact, most arts organizations offer at least differential ticket pricing for students, for example, some kind of family activity, and some degree of individual adult activity. However, these offerings are not developed as deeply as those directed at children and non- traditional audiences. Many of the options available to (non-professional) young adults appear to be based on prevailing perceptions of their tastes, habits and interests, and not based on any substantial evidence of these. The result has been an under-development of these audiences, as well as wasted resources and opportunities.

Audience studies (or, to put it more formally, market research) are used by arts administrators, funders and educators for planning. There is a dearth of information on young adults enrolled at colleges and universities and their perception of and consumption patterns in the arts. This study aims to begin to close gaps in what is known about this important group. If arts organizations are to target it seriously, information is needed on what motivates the segment to consume arts and culture, what types of
marketing efforts they are most responsive to in the arts[3], and what marketing strategies (in terms of pricing, distribution, augmented products, and communications) are likely to be most efficient (i.e. maximize limited resources).

In this review of Philadelphia arts organizations' marketing efforts to college students, the following assumptions were observed:
1. Avant-garde, or "edgy" programming is particularly attractive to students.
2. Most students are singles, seeking to become couples or mingle with other singles.
3. If students do attend a performance or exhibition as a group, it is only because they are in a class, and will make the visit with their professor (in a specific artistic or scientific discipline, closely related to the show's theme).
4. Students are not willing (or shouldn't have to) pay full price for tickets, under any circumstances.

3 There are a multitude of studies of what students respond to in the for-profit sector. Although we do not elaborate on these here, they were considered when assembling the survey questions.

This study tested these assumptions and found them to be false, on all counts. Students tended to prefer the familiar, to attend shows in unstructured groups or with their families or dates, and they (or their

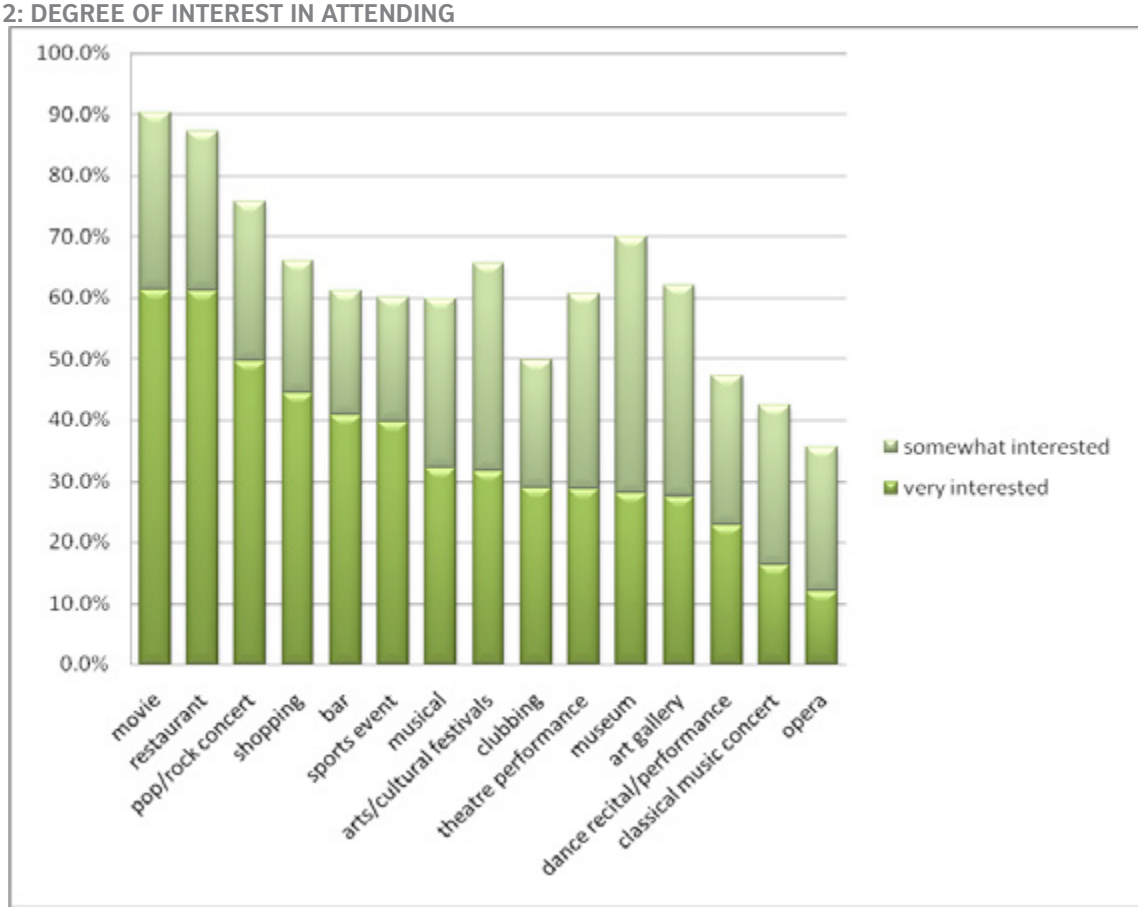
parents) are quite willing to pay full price (or even higher student prices) for tickets. The following section provides a preliminary summary of some of the main findings of the survey, and discusses a few of their implications.

Key Findings

Are students interested in the arts?
Students were asked to rank their interest in participating in a variety of leisure activities which included the arts but extended to shopping, clubbing and going to the movies (Figure 2). Not surprisingly, the study confirmed that students are very interested in going to the movies (61.3%), eating out (61.2%), going to pop/rock concerts (49.6%), shopping (44.4%) and attending sporting events (39.6%). However,
attending musicals (32.1%) and arts/cultural festivals (34%) outscored clubbing (28.8%). The respondents were interested in a variety of additional arts options: theatre performances (31.9%), museums (28%), art galleries (27.4%), dance performances (22.7%), classical music concerts (16.4%) and opera (12%).

Figure 2 shows these responses as well as those corresponding to the "somewhat interested" option (respondents could also choose "neither interested nor uninterested," "somewhat uninterested," and "no interest at all"). As the figure indicates, there is a very substantial potential audience for the arts among college students.

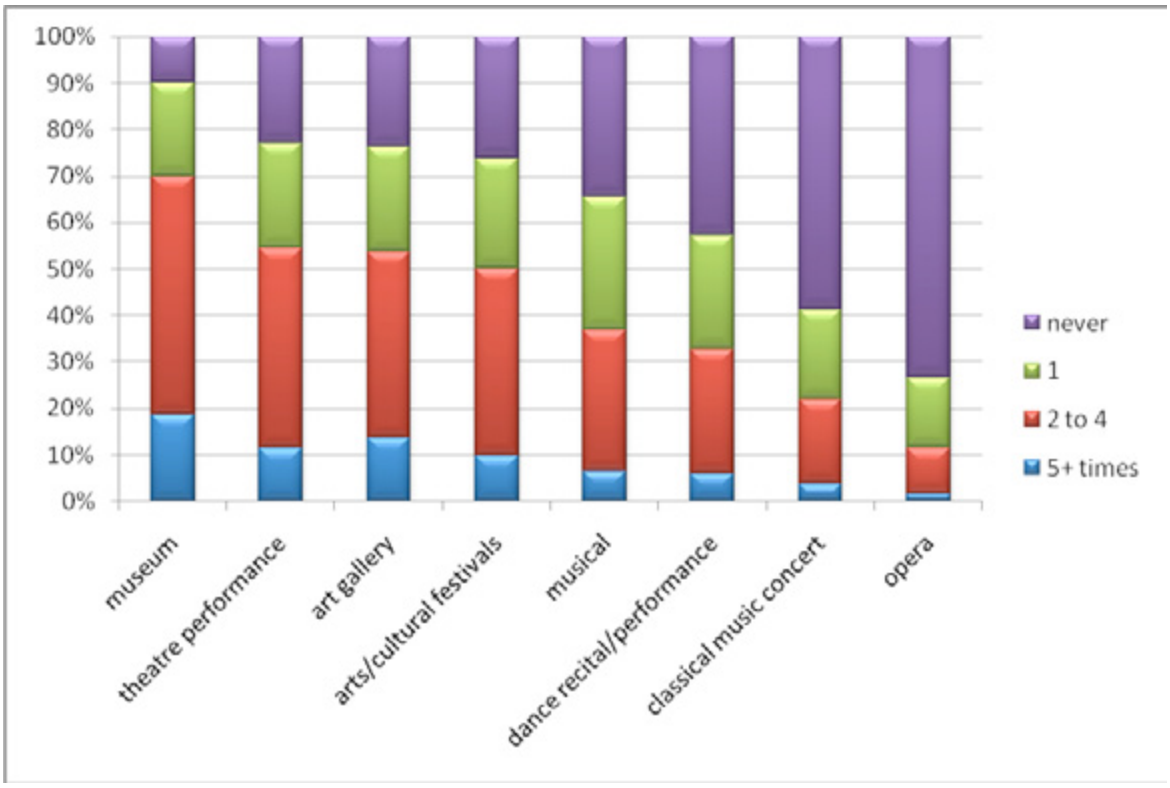
FIGURE 2: DEGREE OF INTEREST IN ATTENDING



What is their attendance to arts events really like?
Given that students declared a healthy interest in attending arts and culture events, the study tested what their arts and culture consumption habits were. It did so in two ways: first, it asked how often students attended

(or planned to attend) arts and culture events on campus, and second, how often they attended the same *off* campus, by discipline. Most students planned to attend arts and culture events on campus at least once a month (40.7%), followed by at least once a term (18.8%) and once a semester (16.1%).
For off-campus shows and events, they were asked to state their frequency of actual attendance, from "never" to "five times or more per year." Figure 3 shows the summary results for the entire population, for all arts categories surveyed.

FIGURE 3: ACTUAL ANNUAL ATTENDANCE

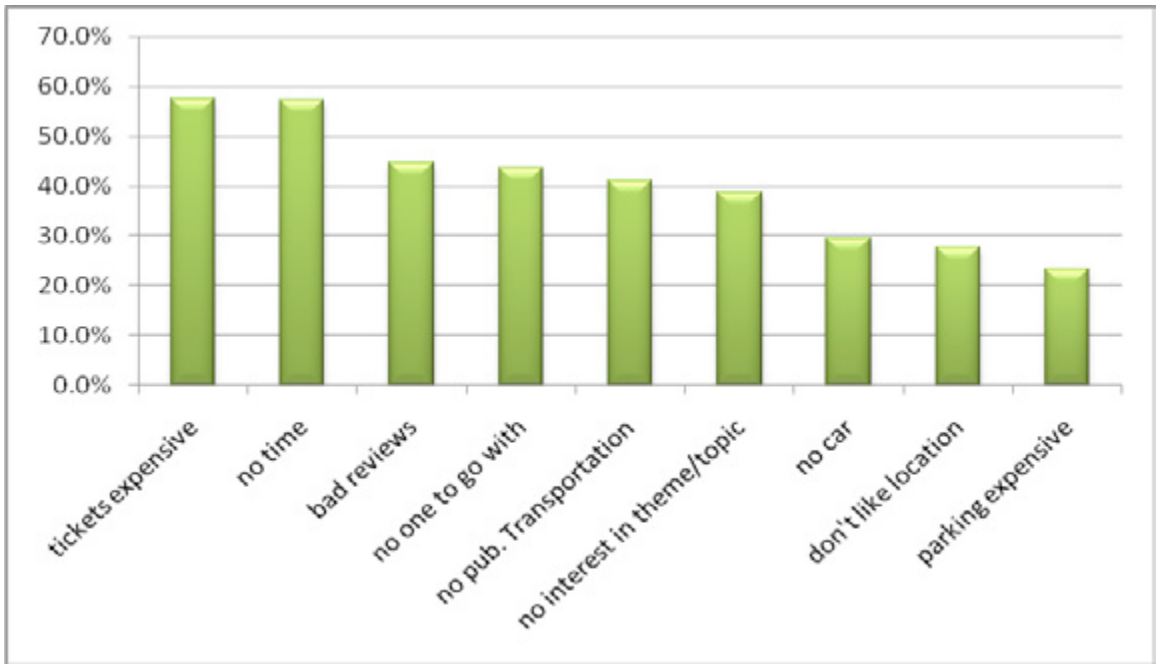


The greatest attendance was reported for museums (18% attended five times or more per year, 49.1% attended between two and four times per year), followed by theatre (11.1% for 5 times or more per year, 41.3% between two and four times per year). In a separate question, students were asked how frequently they traveled to New York, Washington, DC or Baltimore to attend an arts and culture event. A surprising 28% reported that they did so frequently, while 50.1% did so rarely.

The lowest attendance scores were reported for classical music concerts (3.8% attend more than five times a year, 17.3% do so between two and four) and opera (1.4% and 9.8%). Although some of the categories exhibit fairly high numbers, they do not correspond to the numbers in the "interest in attending" question. The next question, then, is to determine what is keeping them away, and what does make them want to attend.

What are the main barriers to attendance?
If students are so interested in attending arts and culture events, why isn't their attendance greater? Students were asked to rank a series of possible barriers (which targeted all components of the marketing mix) in the following terms: "would definitely keep me from going," "it might keep me from going," "it wouldn't matter at all." Ticket prices and lack of time were the highest barriers (57.5% and 57.3%, respectively), followed by bad reviews (44.6%), lack of companions to attend with (43.7%), lack of public transportation (40.9%) and lack of interest in the theme or topic (38.8%).

FIGURE 4: BARRIERS TO ATTENDANCE

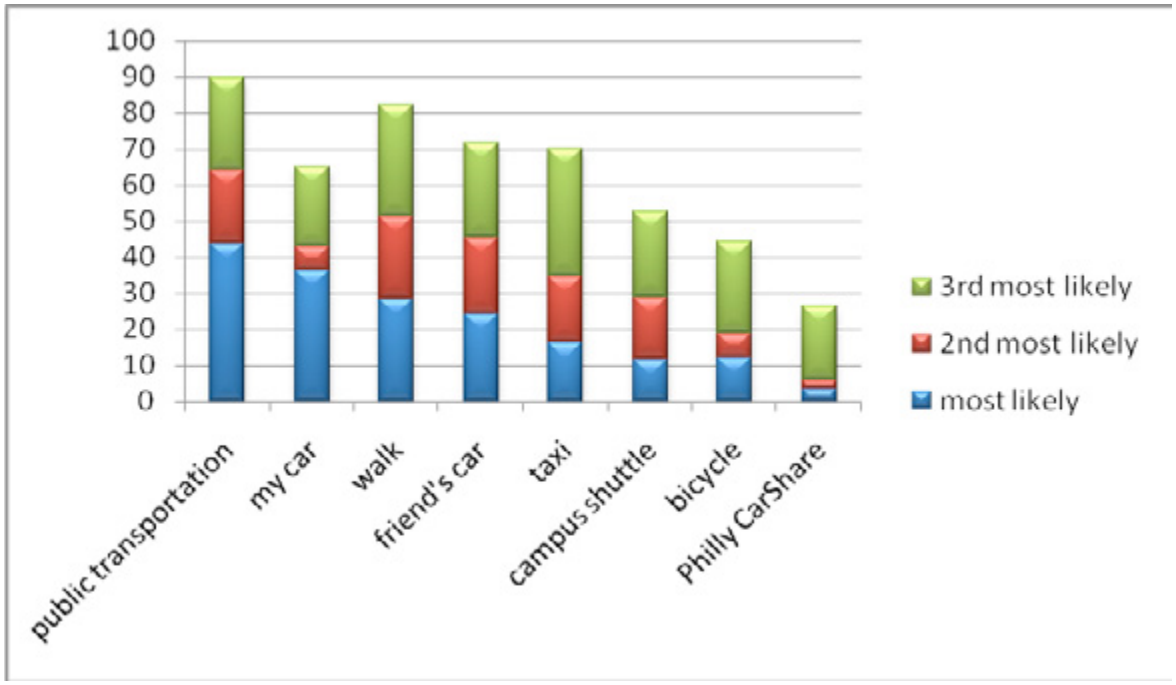


Each of these barriers was tested against students' understanding of pricing, access, nature of the arts and culture options available to them, and communications mixes directed at them. As with the arts organizations' assumptions, we found that students are also misinformed on all these counts and, thus, that these barriers are far from insurmountable. In the next pages we discuss the six main barriers (transportation, theme, lack of companion, information sources/reviews, lack of time, and expense), and the rebuttals offered by the data collected from the students themselves.

Getting there: cars, public transportation and parking

Students were asked to rank their modes of transportation to arts and culture events, from most likely to third most likely, out of a possible eight options. Figure 5 shows the summary of responses for the entire population. Public transportation (43.9%), own car (36.1%), walking (28.4%) and getting a ride from a friend (24.1%) are the four options cited as most likely.

FIGURE 5: PREFERRED MODES OF TRANSPORTATION (FOR ARTS AND CULTURE)



As many of the arts and culture offerings cited by students as of great interest are easily accessible by public transportation, their assertion that public transportation is not available does not hold. If students cite transportation are their most probable mode of transportation, perhaps arts organizations could make sure that directions on how to access their venues using public transportation are easily accessed on their websites and other materials. Most of the arts organizational websites observed for this study give extensive and detailed directions on how they may be reached by car, but most just offer a direct link to the local transit authority's (SEPTA) website for public transportation information.

What's this about? Familiarity and comfort

Another issue cited by students as an attendance barrier had to do with their lack of interest in the theme or topic of the show or exhibition (38.8%). In a separate question, students reported that familiarity with the actors would be likely to make them attend (30.5%) or somewhat likely to make them attend (37.2%), as would familiarity with the play/theme/music (39.4% very likely, 41.4% somewhat likely). Thus, an emphasis on edginess may not be immediately appealing to college students. Rather, connections to the familiar may give students greater confidence to attend and seek to persuade others to attend with them.

Companionship and arts attendance

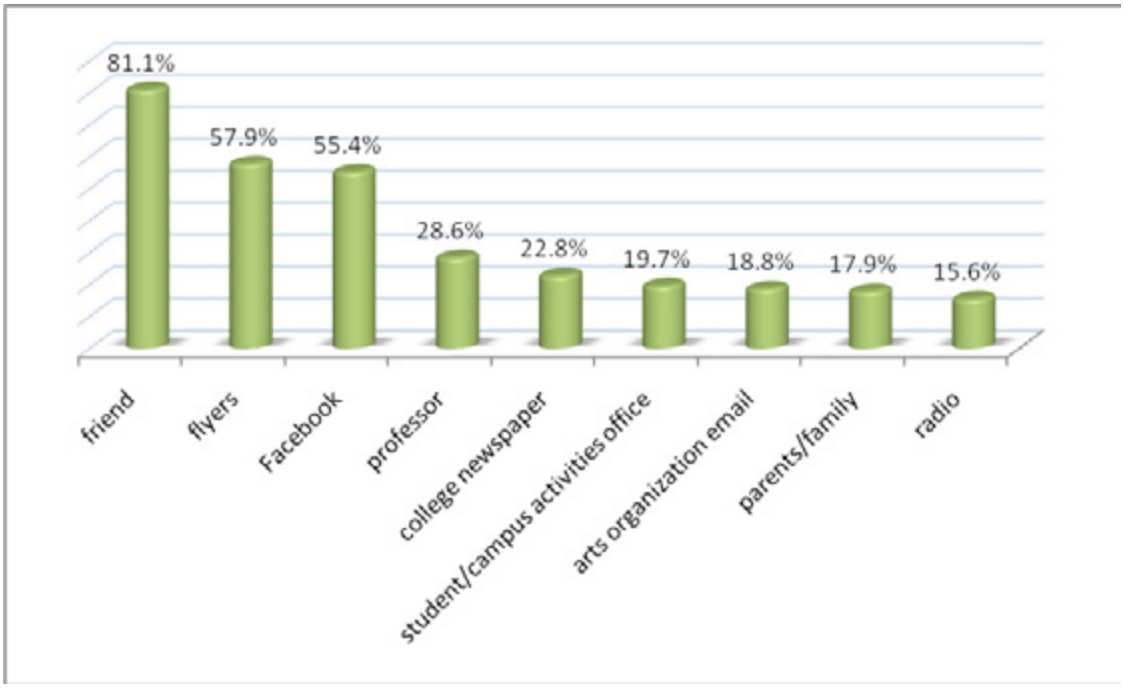
Lack of a companion was cited as one of the most significant barriers to arts and culture attendance (43.7%). Although arts organizations usually can't secure companions for their patrons, they can take steps to facilitate the types of companionship or collective experiences that these might find most attractive. For example, 89.5% of students like to attend arts and culture events as an outing with friends, so some options (in terms of augmented products and services) may be tailored to accommodate them. Although the assumption is that students are mostly interested in dating, parents or other family was the second-highest cited group in term of companionship (62.6%), followed then by dates (37.4%). Yet, to the best of our knowledge, most offering for families in Philadelphia arts organizations are geared to those that include young children, not young adults.

Students also reported that if a friend was interested in attending that would be the single most important factor in their decision to go to an arts event (67.5%), while 40.4% valued arts events as a way to spend time with their families. Clearly, the social aspect of arts attendance cannot be easily discounted.

Information sources

Where do they get their information about the events they decide to attend? Are there inexpensive ways to target this audience? Are there more effective ways to address them than what arts organizations are using now? Figure 6 summarizes the top information sources for college students. Not surprisingly, friends are the most significant category (81.1%). What was unexpected, though, was the importance of flyers (57.9%) in publicizing events. Flyers outscored professors (28.6%), college newspapers (22.8%), student activities offices (19.7%), and emails from arts organizations (18.8%), although these were not insignificant. Another top source of information was Facebook (55.4%), which allows for targeted and relatively inexpensive advertising.

FIGURE 6: TOP INFORMATION SOURCES



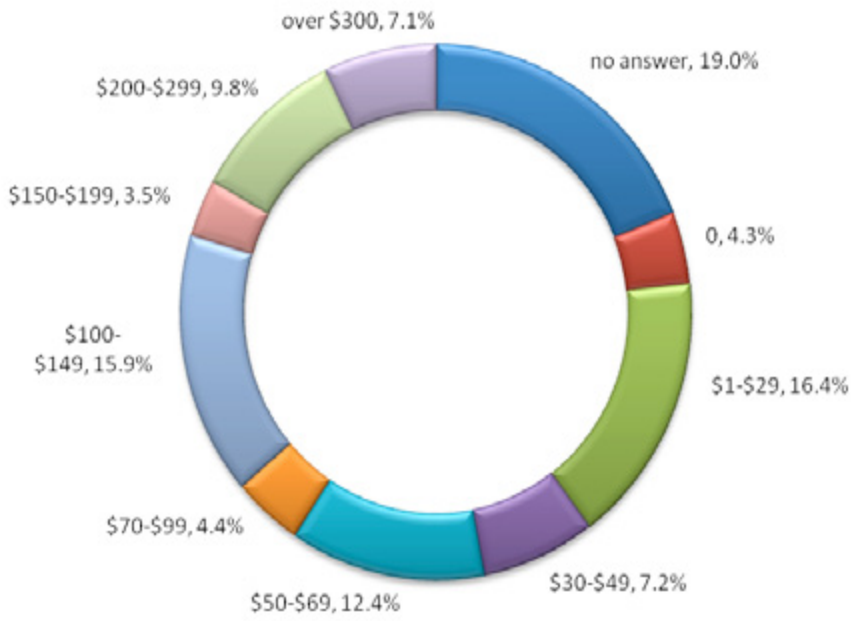
Bad reviews had been cited by students as a barrier to attendance, but 64.7% indicate that if a friend recommends a show that would make them very likely to attend. Working with peer networks, then, might be a way to counter negative or indifferent reviews. Professors' recommendations are also significant, at 22.6%.

Pricing: what is the issue?

As was discussed above, pricing was cited by college students as the most important barrier to arts attendance; 57.5% reported that expensive tickets would keep them from attending. To test the strength of the barrier, we were interested in answering a number of questions: how much are students willing to pay for different types of arts events? What does "expensive" mean? How much do they usually spend on arts and leisure? What are their ticket purchasing habits? Are they aware of student tickets and student discounts at local arts and culture venues?

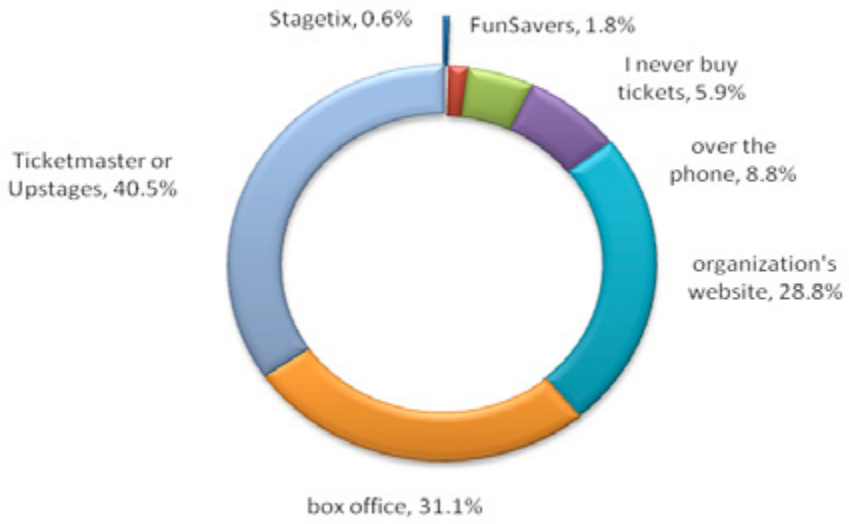
Figure 7 shows students' average monthly spending on leisure. This includes arts and culture events, as well as the other leisure options (movies, clubbing, etc.) discussed earlier in this document. Spending tends to be low, but over 40% spend over the price of a full-price annual museum membership each month.

FIGURE 7: MONTHLY SPENDING ON LEISURE



The study also investigated students' ticket purchasing preferences (figure 8), as most organizations offer the option of buying tickets directly over the phone or on their websites. The data shows that for the arts, the box office is the single most important source of ticket sales for students.

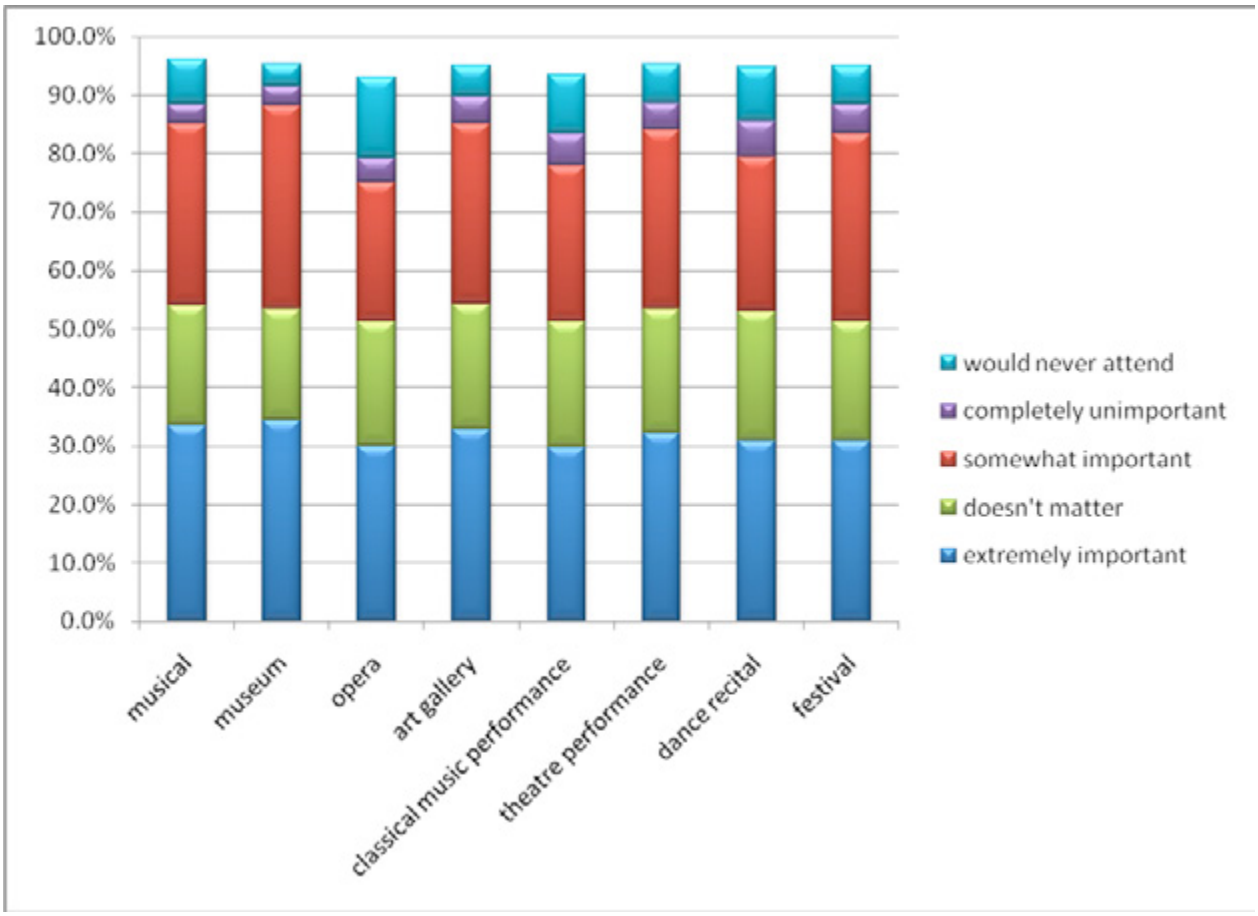
FIGURE 8: TICKET PURCHASING PREFERENCES



This has clear implications in terms of where the organizations' efforts are directed when targeting this segment. In conversations with students, we found that they frequently felt treated as second-class patrons when they approached the box office to buy student tickets.

To gain further insight into students' perceptions of pricing, we asked how much the availability of student tickets or discounts would be likely to positively influence their decision to attend certain arts and culture events. In all categories, at least a third of the students believed that the availability of student discounts would be extremely important in their decision to attend, while another third considered this "somewhat important" (figure 9).

FIGURE 9: IMPORTANCE OF STUDENT PRICING IN DECISION TO ATTEND



Given that a) most (if not all) of the arts organizations available to these students do offer discounted tickets, b) students cite pricing as a very important factor, and c) the discounted tickets that are available fall well below the thresholds reported by students as acceptable pricing levels, and d) that students have reported significant interest in attending arts events, then we would expect student participation to be higher than it is. We wondered if students were aware that these discounts were, in fact, available to them. Figure 10 shows students' awareness of discounts and pricing formulated especially for them at local arts organizations. A minority of students knew that all/most organizations offered discounts (less that 12%
for most, 18% for museums, and roughly a fourth believe that "some" offered discounts (the number was much higher for museums, at 42.5%). Clearly, the existence of discount pricing, as well as the range of the same, needs to be better communicated to student audiences.

FIGURE 10: AWARENESS OF STUDENT DISCOUNTS

	musical	museum	opera	art gallery	classical music concert	theatre	dance recital	festival
none	3.2%	3.2%	6.9%	3.8%	5.8%	4.2%	4.8%	4.6%
don't know	53.3%	31.9%	61.9%	47.2%	56.2%	50.5%	57.4%	54.2%
yes, some	28.8%	42.5%	18.7%	33.3%	24.2%	31.3%	23.8%	26.7%
yes, all	10.5%	18.0%	7.2%	11.1%	8.5%	9.5%	8.9%	10.1%

STATISTICAL ANALYSIS

1. Variables

1.1 Attendance. Attendance to Opera, Ballet, Orchestra, Museums, Plays, and Musicals were measured by the question "How often do you go to the following events in a year?" From these data, two measures of attendance were constructed:

a. *Event Attendance*. A dichotomous variable measuring the attendance to a particular event (Opera, Ballet, and so on). These variables were coded 0 if the student has not attended the type of event in a year, 1 otherwise.

b. *Overall Attendance*. A continuous variable measuring the frequency of attendance to any event. This variable is created by adding the number of times that the student reported to have attended to the different types of events in a year (range from 0 to 30).

1.2 Awareness. Awareness of the existence of student benefits for Opera, Ballet, Orchestra, Museums, Plays, and Musicals were measured by the question "Do the following types of organizations offer some kind of student benefit in Philadelphia?" From these data, two measures of awareness were constructed:

a. *Event Awareness*. A dichotomous variable measuring the awareness of the existence of benefits offered to students by each organization (Opera, Ballet, and so on). These variables were coded 1 if the answer is YES, and 0 otherwise.

b. *Overall Awareness*. A continuous variable measuring awareness of the student about the benefits offered by cultural organizations. It is calculated as the sum of the Event Awareness for all the types of organizations (range from 0 to 6).

1.3 Leisure Spending. The amount of money spent in leisure activities per month was measured by the question "How much do you usually spend per month in leisure activities? Fill in the approximate dollar amount." From these data, three spending measures were constructed:

a. *Affluence*. A dichotomous variable measuring high and low spending in leisure. This variable was coded as 0 f spending was less than $100, and 1 otherwise.

b. *Spending*. A continuous variable measuring the amount of money allotted to leisure spending. It is measured in 10 dollars units.

1.4 College. A random sample of 6 colleges was taken from 19 colleges. These 19 colleges are, from among those universities in Pennsylvania located in Philadelphia, Bucks and Montgomery counties. Two variables are constructed:

a. *Size.* These colleges where classified according to their size. This variable is a dichotomous variable with value of 1 if the student population was larger than 3000 students and 0 otherwise.
b. *College.* A categorical variable identifying each college in the sample.

2. Methods

The first question addressed in the analysis was: which are the determinants of attendance to the different types of events? For each type of event, a logistic model was constructed to look at the effect of awareness and income on attendance. The main and interaction effects of *event awareness* and *affluence,* controlling for *Size* are tested in nested models by utilizing SAS's GENMOD procedure.

For Ballet, Opera, Orchestra, and Musical, the models including all the interactions and main effects show that the odds of attending at least once the event increases when the student is aware of the existence of student benefits (coefficients for event awareness are positive and significant at 0.01 level). The increases in odds range between 280% for Operas to more than 3000% for Musicals. In addition, the odds of attending at least once the event increases when the student allocates more than $100 to leisure (coefficients are positive and significant at levels of 0.05 and 0.10). The increases in the odds range between 40% for Orchestra to 120% for Musicals.

There is evidence that for students that allot more than $100 to leisure activities the odds of attending the events decrease when they are aware of the existence of benefits - i.e., the odds of attending decrease by 30%, 40%, 45%, and 55% (Orchestra, Opera, Museum, Plays, respectively) when aware students are also affluent. (This effect can be also interpreted to mean that for the students who are aware of the benefits, the odds of attending increase by around 40% when they are not affluent, compared with those who are.) This effect is significant at the 0.05 level for Museums, at the 0.10 level for Opera, Plays and Orchestra, and not significant for Ballet and Musicals. Taking together that all these estimates are negative and that some of them are significant, there is some indication that this effect is present across all of these types of events.

Overall, the estimates of the parameters for the main effect and the interaction between awareness and affluence remain significant at the same level when the control variable is excluded from the models. In addition, tests performed to compare the full and reduced models show that the reduced ones are not significantly different from the full model.

Finally, the question: "what is the effect of income and awareness on attendance to cultural events?" was addressed. The model showed that attendance increases with awareness and this relation is the only significant one (at the 0.01 level). However, in spit of not being significantly different from zero, the coefficients for the interaction term (awareness*spending) are consistently negative. This provides some indication that the negative influence of the interaction found in the models for the different cultural events is also present in these models. One reason for this lack of significance may be a small, consistent effect combined with a measuring of the dependent variable at a scale where the differences cannot be detected (tens of dollars per month instead of thousand of dollars per year). The dichotomous measure of income (*affluence*) is utilized in order to magnify this effect.

Still, with spending as the variable measuring the amount of money allocated to leisure, a Fixed Effect Model of the effect of *awareness* on *attendance* was estimated with SAS's PHREG procedure. This procedure controls for all the characteristics of the college that may affect the attendance to cultural events. The results show the parameter estimations at the individual level. Accordingly to this model, students' attendance increases by a 15% when overall awareness of student benefits increases by one unit. In addition, this effect is independent of students' income.

A second set of models introduces the amount of money spent in leisure activities by means of *affluence*. In this case, the interaction becomes negative and very significant in every model, except for the one without *affluence* main effect. Therefore, there is strong evidence that at the same level of awareness about benefits, the average number of events attended by less affluent students increases by a 3% more than the one for wealthier students. When controlling for all the characteristics of the colleges (clustering variable), at the same level of *awareness*,

the increase in *attendance* for affluent students is 6% smaller than the one for les affluent students. For less affluent students, attendance to cultural events increases by 22% when their awareness of student benefits increase by one unit, and this increment is equal to 8%
when students are affluent.

CONCLUSIONS

The statistical analysis of this dataset provides strong evidence for the relationship between attendance to cultural events and awareness of student benefits. The analysis shows that the student attendance to Opera, Orchestra, Musicals, Plays, Ballet, and Museums increases when students are aware of the benefits offered to them by each type of event. It also presents evidence that discretional income is also associated with increased attendance to these types of events.

A particularly surprising, important result is that when students are aware of the benefits, the odds of attending are larger for those that have less than for those that have more money to spend. This result stands against the intuition that cultural events attract wealthier people. However, it can be understood by realizing that college students should share similar preferences with wealthier people. At the end, they are just momentarily deprived of larger sums of discretionary spending, and in their way to become "wealthier" soon after they graduate. In addition, wealthier students may not have free time to attend
more cultural events. Therefore, from a normative perspective, it appears wise to make efforts in increasing the awareness about student benefits among less affluent students. They are more likely to respond to those benefits.

Finally, the analysis also shows that the number of cultural events (when considered as a whole) attended in one year is associated with the level of awareness of student benefits and the amount of money allocated to leisure activities. Two reasons may explain this association. First, students that attend many cultural events per year are likely to be better informed about the pricing and benefit policies of cultural organizations. Second, students that are familiar with student benefit programs in different cultural organizations are more likely to attend the events offered by those organizations. Third, the larger effect of awareness of student benefits for students with less money to spend in leisure implies that organizations should target those students when promoting their student benefits programs. This group is the most sensitive to this type of programs, which will be reflected in greater attendance.

In sum, this study contributes to our understanding of college audiences by empirically testing conventional wisdom on their habits, preferences and interests. It shows a variety of areas in which arts organizations can improve their connection to college audiences without incurring major costs, and shows that there is a sizeable potential audience for the arts. The strategic implications of this work are that student networks, low-cost/high-impact communication channels, and a focus on socialization may reap the greatest benefits.

NOTE TO THE REVIEWER:

In order to meet the deadline for the paper submission, I have focused on the empirical aspects of this paper. It is my intention to develop the introductory section on the literature pertaining to audience development efforts in the arts and their relative avoidance of the issue of college audiences in the final version of the paper. If the reviewer would like to read that final version in advance of the conference, it is my expectation that the paper will be complete by May 15th.

Key Sources

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