



The WALLCAST™ Concert Experience

A Study commissioned by New World
Symphony

By Rebecca Ratzkin and Alan Brown

Table of Contents

EXECUTIVE SUMMARY	3
<i>Audience Demographics and Relationship to NWS</i>	4
<i>Motivations that Drive WALLCAST™ Attendance</i>	4
<i>Satisfaction and Fulfillment</i>	5
<i>The Philanthropic Argument for WALLCAST™</i>	6
<i>Implications of the Research on Future Development of WALLCASTs™ and the Miami Beach SoundScape Park</i>	7
INTRODUCTION	8
RESEARCH METHODOLOGIES	11
AUDIENCE DEMOGRAPHICS AND MOTIVATIONS	15
DEMOGRAPHICS AND GENERAL CHARACTERISTICS	15
<i>WALLCAST™ vs. Other Concert Formats</i>	17
<i>Relationship to New World Symphony and Classical Music</i>	19
MOTIVATIONS THAT DRIVE ATTENDANCE	21
ENGAGEMENT, SATISFACTION AND FULFILLMENT	27
<i>Satisfaction and Fulfillment</i>	29
THE PHILANTHROPIC ARGUMENT FOR WALLCAST™	34
GENERAL MOTIVATIONS AND INTEREST IN SUPPORTING NWS AND WALLCAST™	35
FOUR PHILANTHROPIC ARGUMENTS	37
POTENTIAL STRATEGIES FOR RAISING ADDITIONAL FUNDS FOR WALLCAST™	44
IMPLICATIONS OF THE RESEARCH ON FUTURE DEVELOPMENT OF WALLCASTs™ AND THE MIAMI BEACH SOUNDSCAPE PARK	48
APPENDICES (TO BE ATTACHED)	50
AUDIENCE SURVEY PRE AND POST-PERFORMANCE PROTOCOLS	50
INTERCEPT INTERVIEW PROTOCOL	50
FOCUS GROUP DISCUSSION GUIDE	50
DONOR SURVEY PROTOCOL	50
STAKEHOLDER INTERVIEW PROTOCOL	50



Executive Summary

Orchestras across the country are faced with the formidable challenge of attracting and retaining new audiences, especially those with little or no experience with classical music, and those who do not relate to conventional formats and venues. While a great deal of effort has focused on developing stronger marketing tactics, a small number of orchestras have quietly turned their focus to designing attractive introductory concert experiences for newcomers to classical music.

In designing and constructing its New World Center, New World Symphony, America's Orchestral Academy (NWS), committed to redefining the classical music concert experience both inside and outside of the hall. With the support of key donors and public officials, NWS constructed an outdoor venue in SoundScape Park, just outside the doors of the Center, as an extension of the building itself. The building's eastern façade was envisioned as an additional stage, with state-of-the-art sound and video equipment enveloping the outdoor audience in a live experience happening just behind the wall. The WALLCAST™ experience was born.



In 2014, three years after the first WALLCAST™ experiment, NWS was ready to reflect on the experience and learn more about who comes, why they come, what value the experience delivers to audiences and community stakeholders, and how it might strengthen the philanthropic case for WALLCAST™ to ensure the future of these free concerts.

This report is the result of a yearlong examination of the WALLCAST™ format. Utilizing a mixed-methods approach combining audience surveys, on-site interviews, post-concert focus groups, a donor survey, and in-depth interviews with community stakeholders, the study yielded a rich resource of information and feedback from which NWS can carry this exciting program into the future with a better understanding of the community it serves and with increasing support from those who wish to extend the reach of classical music.



Audience Demographics and Relationship to NWS

WALLCAST™ concerts attract a diverse and intergenerational audience, ranging in age and cultural background. Overall, 30% of audience members are under 45 years old, 40% are between 45 and 64 years old, and the remaining 30% are 65 years or older. These audiences represent NWS's second youngest audience across all formats, behind PULSE, the late night club-style format (53% under 45), and similar to the audience for Mini-Concerts, another introductory experience developed by NWS.

Thirty-four percent of WALLCAST™ audiences identify as a person of color, a higher percentage than typically observed among classical music audiences, and the third most ethnically diverse of NWS's formats behind PULSE (39%) and Mini-Concerts (36%). In contrast, 12% of audiences at regular season concerts identify as a person of color, nearly three times less in comparison to WALLCAST™ audiences.

On the whole, WALLCAST™ audiences are relatively inexperienced with classical music and NWS programming. Approximately three in ten were attending their first WALLCAST™, and over **three-quarters had never before purchased a ticket to a NWS program**. In comparison to other NWS formats, WALLCAST™ audiences are less experienced with concert-going, in general. One-quarter of WALLCAST™ survey respondents had not attended any classical music concerts in the past year. This compares to 18% for PULSE, 7% for Encounters (an educational format), and just 2% for Journey concerts, a lengthy format exploring the musical works of one composer or theme.

Motivations that Drive WALLCAST™ Attendance

The WALLCAST™ environment is decidedly different in feel and tone to the indoor experience. Sitting outdoors under the palm trees, WALLCAST™ audiences can have richly fulfilling musical experiences, but also rewarding social experiences. When asked why they attended tonight's WALLCAST™ concert, a majority of respondents cited at least one social motivation. The top three motivations cited were “to experience music in a relaxed and social environment” (50%); “to spend quality time with family” or “friends” (44%); and to “enjoy SoundScape park and being outside, in general” (42%).

Further statistical analysis of motivations revealed three overarching themes:

- **Social Fulfillment and Sense of Belonging:** motivations sparked by an invitation from a friend; the desire to have new and socially-fulfilling experiences, whether it is investing in one's personal relationships or interacting with strangers;
- **Setting and Casual Atmosphere:** motivations relating to the welcoming outdoor environment, unique setting, and ease of access (i.e., no cost)



- **Music and Affirmation:** motivations arising from the concert program, composer or musicians; a desire to revisit familiar works; and, in particular, the desire to have an inspiring musical experience.

Satisfaction and Fulfillment

Overall, audience members reported high levels of satisfaction with all aspects of the WALLCAST™ program elements and across all 12 programs surveyed over the 2014-15 season, with average rating scores ranging between 4.2 and 4.8 on a scale of one to five. A strong correlation was observed between satisfaction with “the overall investment of time and money” and satisfaction with overall ambience of the event, pointing to the importance of the ambience – the aesthetic quality of the park setting, the crowd itself as well as the welcoming atmosphere created by NWS – in driving satisfaction.

Survey results suggest that repeat attenders, over time, develop a deep affinity and sense of ownership for WALLCAST™ and, in turn, for NWS. With repeat exposure, levels of satisfaction and fulfillment rise. Repeat attenders also reported higher levels of social and community outcomes (“providing a fulfilling experience for me and my friends or family”) as well as aesthetic outcomes (“gaining a greater appreciation of classical music”).

On the whole, WALLCAST™ concerts have a strongly positive emotional impact, with respondents characterizing their feelings as “inspired,” “moved,” “excited,” and “appreciative,” along with “emotional” and “wonderful.”



The Philanthropic Argument for WALLCAST™

Several generous donors helped to underwrite the initial technology, equipment and staffing costs required to produce WALLCAST™ programs, and continue to support them. The City of Miami Beach collaborated on design and also underwrote some of the technology costs. In 2014, NWS secured a significant multi-year sponsorship from Citi, an important partnership that contributes much to the continued growth and success of the program. Even with a corporate partner in place, broad support from the community will be necessary for WALLCAST™ programs to continue indefinitely.

Data suggest four philanthropic arguments that NWS can leverage as it considers next steps for broadening support outside the base of existing NWS donors.

1. **An Argument for Sowing the Seeds of Appreciation.** WALLCAST™ concerts create and foster fans of classical music by removing some of the traditional barriers that keep many from attending classical music concerts, such as cost, lack of social support, and advance planning. Many who experience WALLCAST™ concerts become missionaries for classical music and NWS, inviting friends and neighbors, who in turn, become fans and pass on the invitation to others. Parents see WALLCAST™ programs as opportunities to introduce their children to live classical music, thereby sowing seeds that will blossom into attendance as adults.
2. **An Argument for Placemaking.** WALLCAST™ concerts provide a safe and welcoming environment where people from all age groups and cultural backgrounds connect. It is a “global meeting house,” according to one stakeholder, where community connection is instant and sharing is a core value. The WALLCAST™ experience builds community and positions NWS as a leader in the emerging field of creative placemaking, defined by [ArtPlace America](#) as an approach to community planning and development in which the arts play a centralized role.
3. **An Argument for Building Miami-Dade’s International Reputation.** WALLCAST™ concerts instill a sense of pride in Miami and symbolize its rise as a cultural mecca. The opening of the New World Center raised the visibility of Miami Beach and catapulted NWS to a new level of international prominence. The innovative and technologically advanced WALLCAST™ experience, along with other signature art events, embodies the best of what Miami-Dade has to offer the world.
4. **An Argument for Leading through Innovation and Experimentation.** WALLCAST™ concerts embrace experimentation and creativity, with the fusion of high quality performance, sound, and video – pushing the boundaries of live digital presentations. These events are a manifestation of NWS’ evolution as a laboratory for classical music, not just in educating the next generations of classical musicians, but also in developing and implementing new formats and content to bring classical music to a broader public.



Apart from corporate and government support opportunities, the research holds implications for a range of potential fundraising strategies for WALLCAST™ concerts:

- The research suggests low-impact strategies when approaching WALLCAST™ audiences for financial support. No one wants to be pestered for donations while on-site, as suggested by focus groups reactions to various on-the-ground fundraising strategies. However, NWS might pilot small-scale crowdfunding campaigns at WALLCAST™ concerts, with instructions for giving projected onto the screen at intermission, for example. This might be complemented with a passive on-site strategy of placing festively designed donation boxes around the park during concerts.
- The WALLCAST™ Club is a popular list and expanding with every concert. There may be ways to start activating and monetizing this group through small gifts (even in the \$5 range) to increase buy-in and participation from regular WALLCAST™ audience members.
- NWS may consider expanding the prime seating section reserved for sponsors in order to accommodate other supporters, although care should be exercised to avoid a VIP scenario that runs counter to the ethos of open access.
- Donor survey results suggest that there may be opportunities for increasing giving from individuals. This might take the form of a special WALLCAST™ campaign above and beyond annual giving campaigns, or an “add-on” appeal layered on annual giving campaigns, specified for WALLCAST™.
- Keying off the “pay it forward” movement, NWS might consider a small surcharge on tickets to indoor concerts, with the proceeds explicitly designated for supporting WALLCAST™ and other free outdoor programming.
- Taking a cue from the global social media giving movement Giving Tuesday, which occurs every Tuesday after Thanksgiving, NWS might explore designating one WALLCAST™ concert presentation each year as a giving event. The concert itself would still be free, but would be positioned as the culmination of a week-long series of online and in-person crowdfunding activities.

Implications of the Research on Future Development of WALLCAST™ concerts and the Miami Beach SoundScape Park

The unique amalgamation of setting, social diversity, and quality of the musical experience defines the WALLCAST™ experience. As successful as it is, WALLCAST™ programming will require continuous investment and infusion of new creative energy to fulfill its long-term potential. Potential areas of development include:



1. **Testing complementary digital programming**, such as other concert or fine arts webcasts (both live and pre-recorded) under a different, but related brand.
2. **Integrating more educational content into the WALLCAST™ program before and/or after concerts**, such as an expanded trivia video reel before the concert, preview performances of the program outside on the lawn, and expanded video interviews with Fellows, visiting conductors and other guest artists.
3. **Expanding WALLCAST™ concerts to underserved neighborhoods within greater Miami-Dade County**, to help residents of diverse communities overcome barriers associated with transportation, a key civic issue.
4. **Engaging more intentionally in placemaking strategies**, leading an effort to further develop SoundScape Park as a premiere public art destination, working through partnerships with artists and organizations to create rotating exhibitions of site-specific artistic work, or broadcast important civic and national events, like presidential debates, and connecting with Lincoln Road businesses and developers to implement Master Plan components around activation of space through performance, and connection to surrounding neighborhoods.

Although it is unique and irreplaceable in many ways, there are aspects of the WALLCAST™ concept and experience that are universal and scalable – coming together with friends, family and strangers, and seeking and creating community through shared artistic experiences. Additional thinking as to how these elements might be further incorporated into SoundScape Park and “travelled” around Miami-Dade could be productive.



Introduction

In 2011, New World Symphony America’s Orchestral Academy (NWS), opened a groundbreaking new music education center and concert hall – the New World Center – to great acclaim, setting the stage for a new chapter of experimentation in artistic programming. The Frank Gehry-designed facility reflected the organization’s aspiration to reimagine and redefine the classical music concert experience, both inside and outside of the building.



In working with the City of Miami Beach, NWS constructed a city-owned outdoor venue – SoundScape Park – just outside the doors of the Center. The building’s eastern façade was seen as an additional stage – an extension of the audience chamber inside. Seated facing the eastern wall, the outdoor audience is surrounded by a horseshoe-shaped audio installation designed to approximate the acoustical experience of the hall itself. A high definition video projection system illuminates the 7,000 square foot wall, offering a startlingly large and clear view of the stage. The WALLCAST™ concert experience was born.

WALLCAST™ concerts are free outdoor simulcasts of live concerts being performed on stage inside the Center. Each season, a schedule of ten to twelve simulcasts is carefully orchestrated by a team of videographers and audio technicians who rehearse along with the orchestra to ensure the right mix of camera angles and close-up shots. While the projection system is used for other purposes (e.g., a Wednesday night film series programmed by the City of Miami Beach), only the simulcasts of NWS concerts carry the WALLCAST™ brand.

Other orchestras and music centers across the country are also experimenting with outdoor live projections of concerts, or are in the process of incorporating simulcasts into their regular programming:

- The Kennedy Center’s current expansion project includes outdoor projection capabilities;
- Pacific Symphony in Orange County, California has produced several “Plazacasts” during which live concerts are projected onto a large screen mounted on the side of the Segerstrom Center for the Arts, directly opposite the Segerstrom Concert Hall where the orchestra is performing;



- Detroit Symphony Orchestra has experimented with outdoor simulcast programming as part of the DLECTRICITY festival, a downtown arts festival;
- Similar to Pacific Symphony, Charlotte Symphony Orchestra has added a live “plazacast” component to its popular thematic KnightSounds concert series, allowing for the public to enjoy for free;
- Dallas Opera has been producing simulcasts of live opera performances for the past five years in Klyde Warren Park, and produce a number of pre-performance activities in collaboration with local businesses and partner organizations;
- Plans for a new music campus in downtown Phoenix, Arizona – the Consolari Performing Arts Center – include constructing a 7,000 square foot screen similar to the NWS wall; and
- The University of Michigan Museum of Art is exploring the possibility of digital projection onto the exterior of the Frankel Family Wing.

Examples like these suggest that the WALLCAST™ concept is gaining steam in the orchestra and opera fields as a way of bringing the concert hall experience to a larger public, breaking down barriers relating to cost and negative perceptions of classical music as intimidating and inaccessible. Both literally and metaphorically, the WALLCAST™ concept offers a window into the concert hall that has morphed into an independent artistic expression

For New World Symphony, the unique amalgamation of elements that define WALLCAST™ – the large size of the projected image, the high quality audio experience, the energy of the young musicians (NWS Fellows), the balmy nights under the stars, and the location’s close proximity to Lincoln Road Mall have made this event a signature Miami Beach experience. WALLCAST™ concerts expose tens of thousands of people to classical music and the New World Symphony each year. NWS estimates that over 24,000 people attended WALLCAST™ programs during the 2014-15 season, three and half times more than the number of people who sat inside the hall for the same programs.

In summer 2014, three years after the initial introduction of WALLCAST™ concerts, NWS recognized a need for further information about who attends these programs, why they attend, what value the program offers to participants and the larger community, and how to strengthen the philanthropic case for financial support of this free program. With support from The Miami Foundation, New World Symphony commissioned this study to address these and other research questions:

- Who do these programs serve? Is the WALLCAST™ audience demographically different than audiences for indoor concerts?
- What motivates people to attend WALLCAST™ programs? What value are they seeking?
- What impacts do these programs have? How are the impacts similar or different than the impacts experienced by audiences for indoor programs?



- Beyond NWS and its audiences, who are other stakeholders in the WALLCAST™ programs (e.g., neighborhood retail, restaurants, hotels, tourism agencies)? What stake do they have in the success and sustainability of these programs?
- How might NWS best go about attracting additional support for these free programs? What aspects of the philanthropic case are most likely to resonate?

The report is organized in two sections, similar to the methodological approach. Section 1 focuses on audience demographics and motivations, exploring who comes to WALLCAST™ and why, as well as the “story” of the WALLCAST™ concert experience from the audience’s perspective. Section 2 dives into donor interests and motivations around giving in general and to WALLCAST™ specifically, and also lays out the value proposition that WALLCAST™ represents to audiences and the larger community. The report concludes with recommendations for potential programmatic strategies and philanthropic approaches to maximizing support.

Research Methodologies

The scope of research was divided into two tracks, similar to the structure of this report. Track 1 focused on finding who comes to WALLCAST™ concerts and why, and Track 2 explored the philanthropic argument and opportunities for WALLCAST™. Each track of work benefited from a mixed methods approach, combining quantitative and qualitative research methods to help paint a more nuanced, yet generalizable, picture of the WALLCAST™ experience and potential.



Track 1 research methods consisted of:

- 1) **Pre/Post WALLCAST™ Audience Survey:** Audience members were approached in the park, starting 45 minutes to an hour before concert time, and asked to participate in a three to five minute survey using a tablet computer. NWS staff led volunteer crews of two to six people, and canvassed the crowd, approaching each group of people and requesting cooperation with the survey. All adults age 18+ were eligible to respond. At the end of the survey, respondents were asked if they would be willing to participate in a second post-performance survey. Those who indicated a willingness to take the second survey were asked for their email address. Post-performance email



invitations to complete the follow-up survey were prepared by NWS and sent within a week of the concert. A total of 2,002 pre-performance surveys were collected, or roughly 8% of all audience members at the 12 concerts surveyed over the 2014/15 season. Four in ten respondents agreed to take the follow-up survey, and 242 actually completed it.

To further boost the pool of respondents, a separate survey link was sent to members of the WALLCAST™ Concert Club, an affinity group whose members receive special notifications and discounts, inviting those who attended a recent WALLCAST™ concert to complete the survey if they didn't already. Over 600 club members took the post-performance survey. Table 1 lists the survey schedule along with the number of completed surveys.

Note that demographic figures described in the body of the report are based on the pre-performance on-site intercept survey sample (n=1,661), as this sample represents the most accurate snap shot demographic profile of the audience. Other results, such as relationship with NWS, and impact and satisfaction with programs, are based on the entire sample of respondents who answered the question.

Table 1: Audience Survey Response Rate Report (Can you add apostrophes for the possessive nouns (Mozart's, Bach's, Tchaikovsky's?))

DATE	Program	Estimated Attendance	# Respondents - Pre-Concert Surveys	# Respondents - Post-Concert Survey
10/11/14	Season Opening with Michael Tilson Thomas	2,200	207	34
10/17/14	Wagner and Brahms	1,200	129	22
11/08/14	Mozarts Jupiter	2,500	97	14
12/13/14	Beethovens Fifth	2,800	114	20
12/20/14	Sights and Sounds of the Season	4,200	75	13
01/24/15	Concerto Showcase	1,700	239	22
01/31/15	New Work	1,500	310	34
02/21/15	Sibelius with Michael Tilson Thomas	1,400	228	35
03/07/15	A Night at Bachs Coffeehouse	300	86	3
03/20/15	Tchaikovskys Fifth	2,500	163	13
04/11/15	The Organ Symphony	1,300	178	16
04/25/15	Season Finale with MTT and Anne-Sophie Mutter	2,800	176	16
TOTAL		24,400	2,002	242

*Note, this does not include post-concert survey response counts achieved through the WALLCAST™ Club email list (n=679).

- 2) **Intercept “Mini-Interviews”:** At the November 2014, January 2015 and March 2015 concerts, audience survey administration was supplemented with on-site intercept interviews with individual audience members. In total, 49 interviews were conducted, including 27 men and 21 women. Fourteen interviewees were first-time WALLCAST™ attendees. The average age of respondents was approximately 55. Interviews lasted an average of 10 minutes each.



Intercept efforts started 60 to 75 minutes prior to the beginning of the concert. WolfBrown researchers and NWS staff were set up at interview stations and conducted the interviews working from a common interview protocol. Interviewees were asked about the social context of attendance (i.e., who are you with, and how do you know them), pre-concert activities, as well as perceived value of the WALLCAST™ experience. To facilitate rapid reporting, interviewers used laptops to capture key pre-coded responses directly into an Excel file, along with notes on open-ended responses. In November 2014, interview stations were set up inside the lobby. Subsequent intercept cycles were moved outside to facilitate greater participation. This second location – adjacent to the WALLCAST™ Concert Club sign-up and sign-in station – improved the intercept cooperation rate by positioning the interview as just another part of the pre-concert activities. In this way, prospective interviewees were less concerned about being separated from their party or missing out on the activities in the park.

Three different approaches to intercepting guests were tested to maximize participation: 1) WALLCAST™ members were handed cards at the WALLCAST™ table when they signed in (every other or every third person was handed a card); 2) survey workers passed out recruitment cards to all audience members sitting on the lawn as part of the survey intercept; and 3) for January and March, a NWS representative (either staff or volunteer) stood near the intercept table and approached audience members as they entered the park from the Lincoln Road side. Most interviews were conducted prior to the performance, with one to two additional interviews conducted during intermission.

As an incentive to participate, interviewees received a coupon for \$10 off a ticket to any upcoming NWS concert remaining in the season. For many, this was an extremely welcome gift, and they were happy to sit down for a few minutes. The most successful interview attempt was in January, most likely due to the additional volunteer staffing support. Barriers to cooperation included confusion between taking the survey vs. participating in an interview (i.e., some thought they had already done their part by taking the table survey), and concern over being separated from others in their party.

- 3) **Post-WALLCAST™ Focus Groups:** Two cycles of post-concert focus groups with audience members were conducted in January and March 2015. WALLCAST™ Concert Club members were contacted by NWS staff via email and asked to cooperate with the research. Those who were planning on attending the specific WALLCAST™ concert were eligible to participate in a group discussion the following day. Although there was strong response to the recruitment survey, confirming participation was a challenge as eligible respondents were uncommunicative or unsure about their final availability until one or two days before the concert. A voucher for \$50 off tickets to an upcoming NWS concert was used to motivate cooperation. In the end, 18 people participated in the four focus group discussions. Participants came from



a range of backgrounds, both native Miami residents and first-generation immigrants, with ages ranging between approximately 25 and 55 years old.

The second track of work around understanding the philanthropic argument for WALLCAST™ relied on the following two research methods:

- 1) **Donor Survey:** NWS donors were invited to participate in a comprehensive survey via an email invitation. The survey contained questions about their experience with WALLCAST™ concerts as an audience member, their general interests and practice in philanthropy, motivations and interest in giving to NWS, and reactions to potential fundraising strategies for WALLCAST™. Just over 100 responses were received out of 936 email invitations sent, for a response rate of 13%. The response was lower than expected for a comparable donor survey, perhaps due to the summer timing or other factors. Results are reported in aggregate only, due to the small sample size.
- 2) **Stakeholder Interviews:** Eight in-depth interviews were conducted with various representatives of NWS stakeholder groups, including city officials, representatives of private foundations, individual donors and board members, representatives of the tourism industry, and local developers. Interviews were conducted with:
 - Bruce Clinton, NWS Trustee and WALLCAST™ supporter
 - Alan Faena & Ximena Caminos, developers
 - Michael Grieco, Miami Beach Commissioner
 - Stuart Kennedy, Senior Programs Officer, The Miami Foundation
 - Deborah Margol, Deputy Director, Miami-Dade County Department of Cultural Affairs
 - Jimmy Morales, Miami Beach City Manager
 - Edward Shumsky, NWS Trustee and WALLCAST™ supporter
 - Bruce Turkel, CEO of Turkel Brands and advisor to Greater Miami Convention & Visitors Bureau
 - Joy E. Power, VP, Marketing, Citi



Audience Demographics and Motivations

Track 1 of the research focused on the “who, why, how and what” of WALLCAST™ concerts. This section summarizes results from audience surveys, mini-interviews, and focus group research.

Demographics and General Characteristics

Table 2 provides a demographic profile of the 2015 WALLCAST™ audience (pre-concert survey respondents only, representing the most accurate picture of the audience), as well as a comparison between first-time WALLCAST™ attenders and repeat WALLCAST™ attenders.

WALLCAST™ concerts attract a diverse and intergenerational audience, ranging in age and cultural background. Overall, 30% of audience members are under 45 years old, 40% are between 45 and 64 years old, and the remaining 30% are 65 years or older. Thirty-four percent identify as a person of color, a higher percentage than typically observed in



classical music audiences (see below for further comparison). Audience members report high-income levels compared to the general population of Miami-Dade County, with 48% reporting household earnings of \$100,000 or more vs. 19% for the County (2014 U.S. Census, American Community Survey). However, there is fair representation at a lower income range, with 20% earning \$50,000 or less. Note that household income includes all incomes contributing to household.

Thirty percent of respondents to the survey were attending their first WALLCAST™ concert. This figure fluctuated between 18% and 37% across the 12 concerts, with higher figures reported for programs including a popular piece such as Tchaikovsky’s 5th Symphony. Comparison of demographics between first-timers and repeat attenders show marked differences between the two groups. First-timers are:

- Significantly younger compared to repeat attenders (41% vs. 24% under 45 years old, respectively);
- More culturally diverse, with 40% identifying as a person of color compared to 32% of repeat attenders;
- More likely to be single (27% vs. 16% of repeat attenders);



- More likely to have lower household incomes (23% earn \$50,000 or less vs. 18% of repeat attenders).

In sum, the data suggests that the WALLCAST™ experience attracts a diverse demographic and succeeds in lowering the barriers to attendance among first-time visitors. Those who return tend to be older and less diverse, on average. Even as WALLCAST™ concerts entered its fourth season, the rate of newcomers remains high.

Table 2: Demographic Summary of WALLCAST™ Audiences (Pre-concert respondents only)

DEMOGRAPHIC SUMMARY - FIRST TIME WALLCAST ATTENDER VS. REPEAT ATTENDERS (Pre-Performance Intercept Responses Only)		Pre-Performance Total Sample (n=1,661)	Repeat Attender (n=1,100)	First-Timer (n=561)
% in Sample			70%	30%
Gender				
Female	57%	57%	56%	
Male	43%	43%	44%	
Age Cohorts				
18-34	17%	12%	27%	
35-44	13%	12%	14%	
45-54	17%	17%	16%	
55-64	23%	25%	20%	
65+	30%	34%	24%	
Race/Ethnicity (multiple select; does not add to 100%)				
White/Caucasian	72%	74%	68%	
Visitors of Color	34%	32%	40%	
Local to Miami-Dade County				
Miami-Dade Resident	72%	80%	56%	
Visitor (live outside Miami-Dade)	28%	20%	44%	
Marital Status				
Married/partnered	64%	66%	58%	
Single/never married	20%	16%	27%	
Previously married/partnered	17%	17%	16%	
Household Income				
Less than \$25,000	7%	6%	8%	
\$25,000 - \$49,999	13%	12%	15%	
\$50,000 - \$74,999	17%	17%	17%	
\$75,000 - \$99,999	15%	15%	14%	
\$100,000 - \$149,999	22%	23%	19%	
\$150,000 and above	26%	26%	26%	

*Note that all results reporting and comparing key demographic attributes of the audiences are based on the pre-performance intercept survey responses only, a smaller sample size than the total 2,002 respondents. This is because the pre-performance responses represent the most accurate demographic portrait of the audience.



WALLCAST™ vs. Other Concert Formats

WALLCAST™ audiences represent NWS’s second youngest audience across all formats, behind PULSE, and similar to the audience for Mini-Concerts, another introductory experience (see Figure 1). Whereas the PULSE audience skews significantly younger (53% under 45 years old), and Encounters skews somewhat older (55% age 65+), WALLCAST™ concerts attract audiences across all age groups, a relatively unique audience composition that has been difficult for many orchestras to achieve through traditional concert presentations.

Similarly, 34% of WALLCAST™ survey respondents selected at least one racial/ethnic identity that is not white – the third most diverse audience compared to other NWS formats, and nearly three times more diverse culturally than the audience for traditional concerts, as indicated by the control concert sample (see Figure 2). PULSE attracts the highest proportion of culturally diverse audiences (39% indicated a race/ethnicity that is not white), followed by Mini-Concerts (36%).

Figure 1: Age Comparison Across All NWS Concert Formats

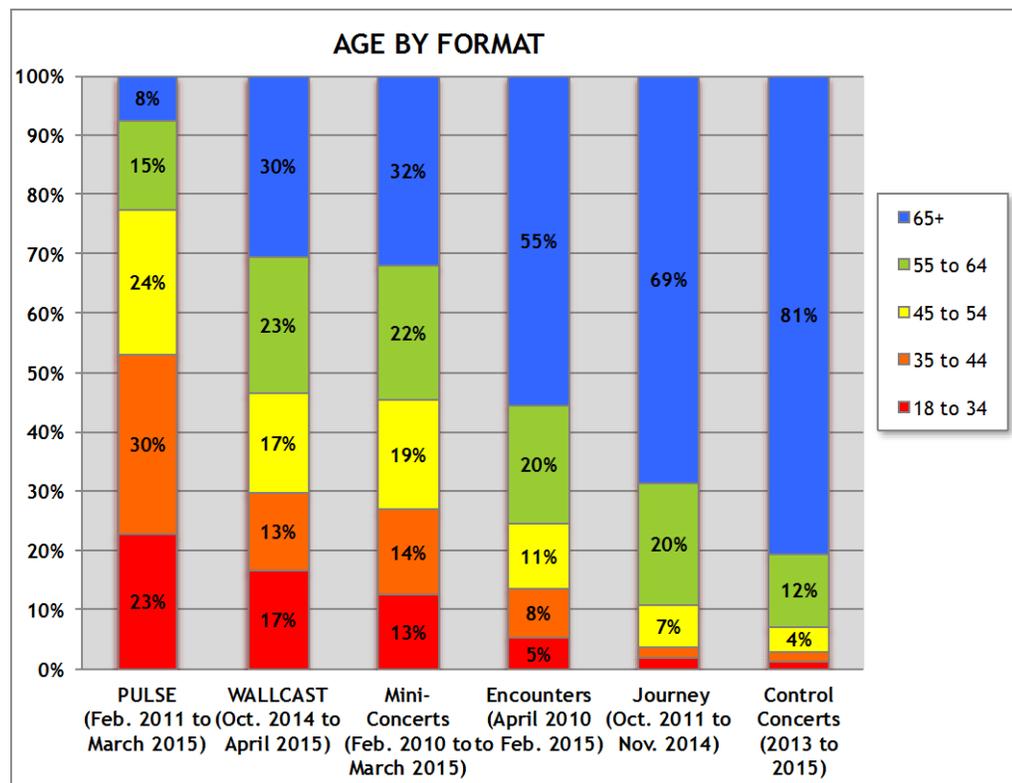
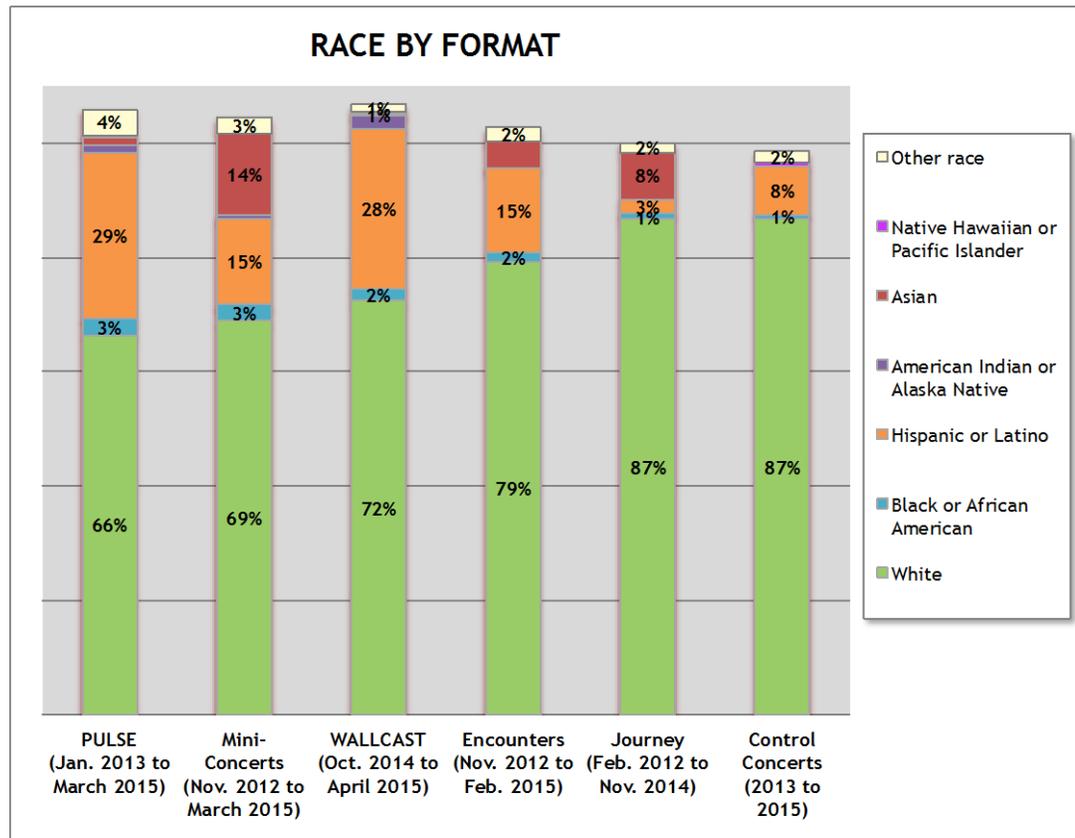


Figure 2: Comparison of Race/Ethnicity Across All NWS Concert Formats



Interview respondents and focus group participants were asked to describe the WALLCAST™ crowd in qualitative terms, to better understand perceptions of the audience and to see how well perceptions line up with actual data. For the most part, perceptions aligned with reality. One focus group participant noted the intergenerational aspect of the audience, from *“the little ones to the pets to the elders; the demography of people is wide, and always everybody is interesting and interested.”* One interviewee, an older gentleman who was attending WALLCAST™ for the first time, was surprised and delighted to see so many young people. Others echoed this sentiment, noting in particular the presence of many families, and the chatter of a variety of languages, from Spanish to Russian. Many noted how different the crowd seems compared to what they imagine about the audience inside. Perception is in the eye of the beholder, apparently, as five interviewees under 45 years old described the crowd that night as similar to the one they imagine was inside - slightly older, whiter, and with a higher socio-economic status. Still, these younger audience members were able to distinguish between the feeling and energy of the crowd outside vs. inside.

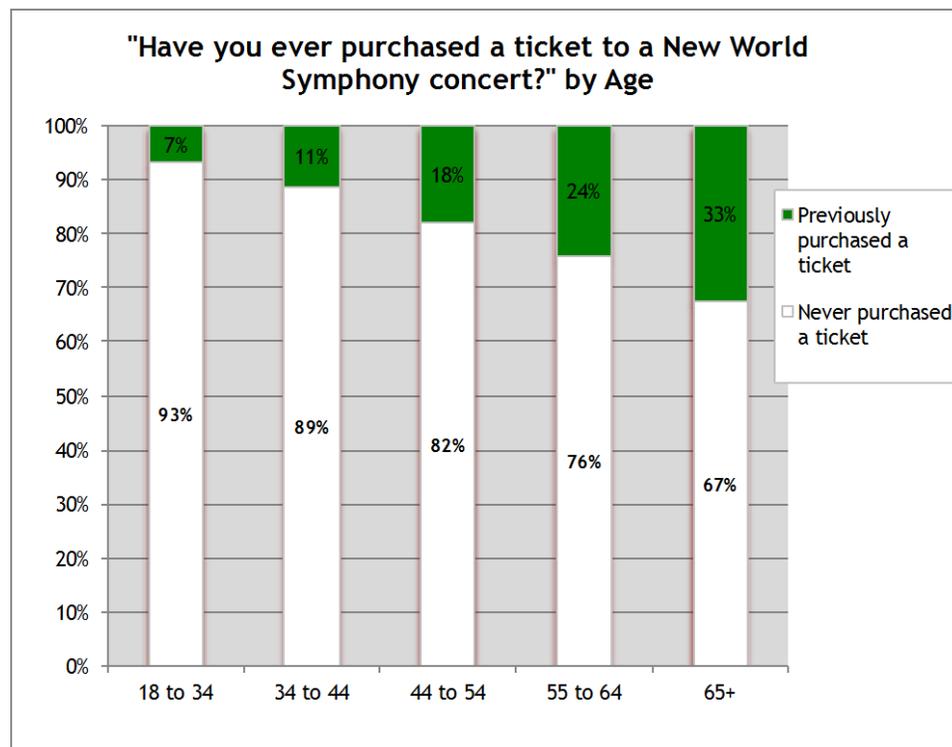
Focus group participants were enthusiastic about the diversity of the WALLCAST™ audience, but still feel that more that could be done to reach out to under-served populations, in particular beyond Miami Beach. *“There is a need for a younger generation,”* said one respondent. Others agreed, but also understand how difficult it can be to attract younger adults to classical music programs.



Relationship to New World Symphony and Classical Music

One of the goals of WALLCAST™ concerts, similar to several other experimental formats used by NWS, is to introduce people to the classical music concert experience, and to NWS and its mission. As noted earlier, survey results suggest that three in ten audience members are attending WALLCAST™ concerts for the first time, and 78% have never before purchased a ticket to a NWS concert. As expected, younger audiences age 18-34 are much less likely to have purchased a ticket to a NWS concert (see Figure 3) compared to their older counterparts (7% vs. 33% for respondents age 65+). Still, two-thirds of WALLCAST™ audience members in the 65+ age cohort have never been to a NWS concert.

Figure 3: Previous Ticket Purchase to NWS Program

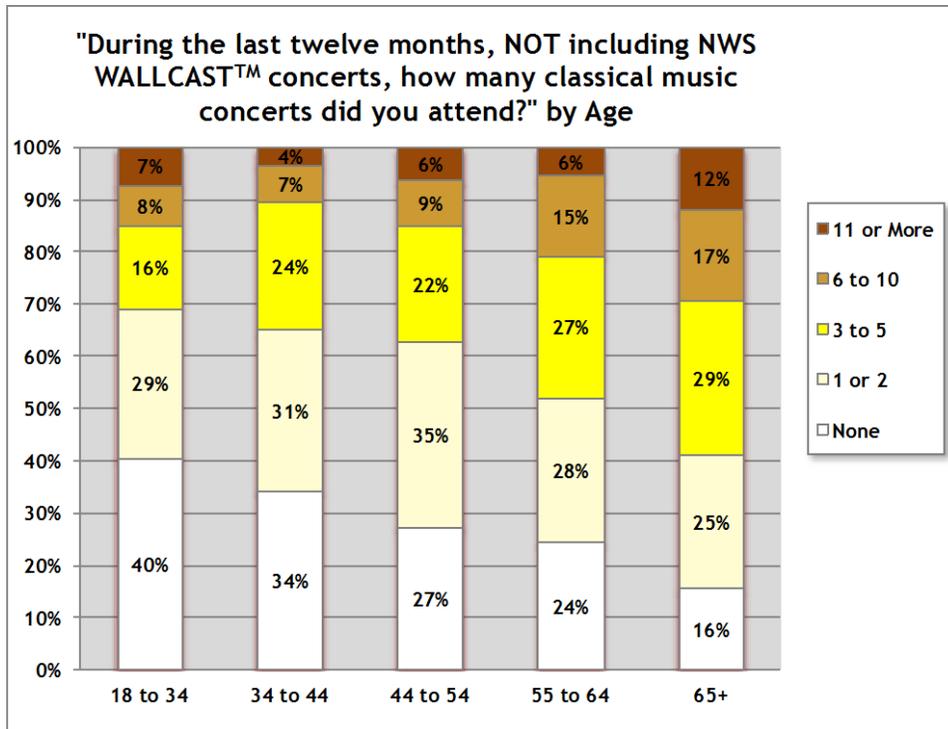


Similarly, younger WALLCAST™ audience members are significantly less experienced with attending classical music concerts, at least regularly. Figure 4 reports frequency of classical music concert attendance in the past 12 months (not including WALLCAST™ concerts) across the age cohorts. Four in ten survey respondents under 35 didn't attend any other classical music concerts in the past 12 months, compared to 16% of respondents age 65+. Conversely, 29% of respondents age 65+ attended six or more concerts, compared to only 15% of respondents under 35. In sum, we note that a majority of WALLCAST™ audience members under 55 are infrequent concertgoers (1



or 2 times a year), or don't go at all – suggesting that WALLCAST™ concerts are a lifeline to live classical music for a larger portion of the audience.

Figure 4: Frequency of Classical Music Concert Attendance by Age

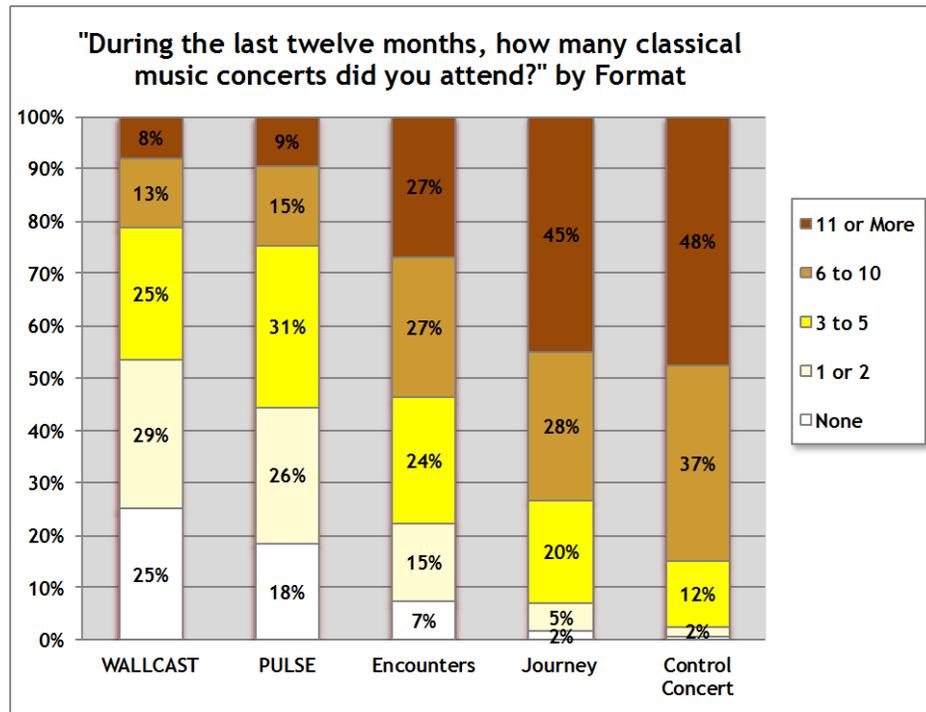


In comparing frequency of attendance by format, it is clear that WALLCAST™ audiences are much less experienced with classical music compared to audiences for ticketed NWS concert formats (see Figure 5 below). One-quarter of WALLCAST™ survey respondents had not attended any classical music concerts in the past year. This compares to 18% for PULSE, 7% for Encounters, and just 2% for Journey concert respondents. While this is intuitive, the magnitude of difference is notable, and suggests opportunities to foster a deeper understanding of classical music using the WALLCAST concert experience as a departure point, and suggests a need for pathways toward greater engagement with the New World Symphony.

Qualitative data offers further perspective on the extent to which WALLCAST™ concerts attract people who are new to classical music. In particular, focus group participants spoke passionately and eloquently about how easy it is for them to invite people to WALLCAST™ concerts who might never set a foot inside a concert hall, either due to discomfort or lack of funds. One woman remarked that WALLCAST™ “reaches a demographic of people who, when they think of classical music and the symphony, think about stuffy people sitting very rigid, and when they have that [WALLCAST™] experience and it is more laid back” and therefore more attractive and comfortable. Another recounted the success she’s had getting friends to WALLCAST™ concerts who’ve never been to a concert before – because “they’d be too intimidated to go because they wouldn’t know how to behave.”



Figure 5: Frequency of Classical Music Concert Attendance by Format



Motivations that Drive Attendance

One of the reasons interviewees and focus group participants feel comfortable bringing others who might otherwise be uncomfortable inside a concert hall is because the WALLCAST™ environment is decidedly different in feel and tone to the indoor experience. Most focus group participants feel there is a palpable “collective hush” and respect for the music at WALLCAST™ concerts, but it isn’t prohibitive or restrictive. If someone wants to talk, they feel they can do so without fear of reprimand or reproach. Tweeting, posting to social media, emailing, texting and taking pictures is also allowed, and even encouraged. One mother described how her daughter likes to dance to the music, “even Tchaikovsky.” Being outside allows for movement and talking, and makes the experience so much more enjoyable for her and her daughter, setting up a more positive association with classical music for the child and an affinity to NWS for the parents. She surmised that this is the appeal for other families, including the families she has turned into WALLCAST™ fans.

The combination of the park setting and high quality WALLCAST™ programming creates a space where participants feel comfortable approaching and talking to strangers. Generally, this kind of interaction does not occur at indoor concerts, where most patrons focus their attention on others within their party but do not approach strangers. Interviewees used words like “informal” and “loose” to describe the feeling



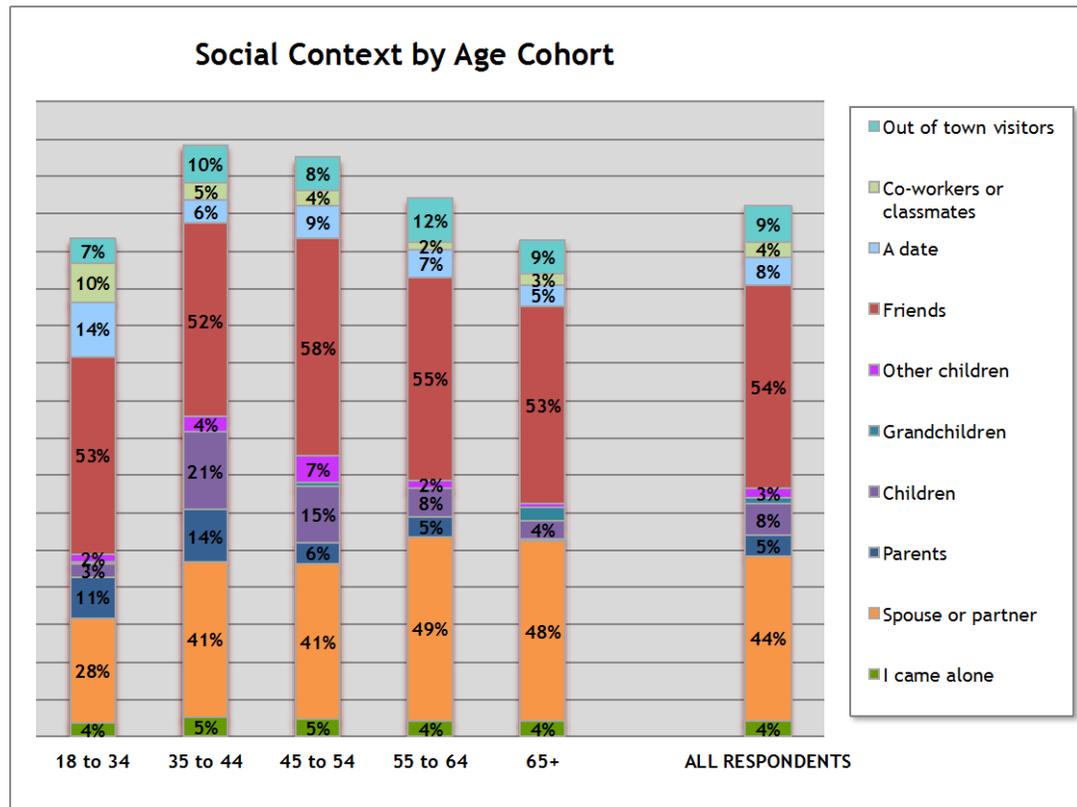
and difference between inside and outside, and that the outdoor environment permits and encourages social interaction. People easily talk to strangers; “*nobody is putting up any walls*” as they might in other more formal situations. One focus group participant described the fluidity of social interaction this way: “*We talk to everyone around us. The woman next to us was cold, so she ended up taking a corner of our comforter (for warmth)... We usually have a printed PDF of the program, and that gets passed around. Other people ask if you can watch their stuff. It’s very collegial and communal.*”

In fact, many interviewees assume that one of the differences between indoor vs. outdoor crowds is that the outdoor WALLCAST™ audience is more interested in the social experience than the music, but that everyone respects the music. All interviewees credit the high quality of musical performance as a factor driving the overall success of the WALLCAST™ experience.

Survey data supports interviewees’ and focus group participants’ observations of the free and open social environment. Just over half of WALLCAST™ audiences (54%) attend with friends, a figure that remains relatively consistent across all age cohorts (see Figure 6 below). Sixteen percent of all respondents attend with family members other than a spouse (i.e., parents, children or grandchildren), suggesting an intergenerational experience. This percentage is highest for those in the 35 to 44 cohort, with 21% attending with their children, 14% with parents. Respondents under 35 are more likely to attend with co-workers or a date than their older counterparts (10% and 14%, respectively).



Figure 6: Social Context by Age



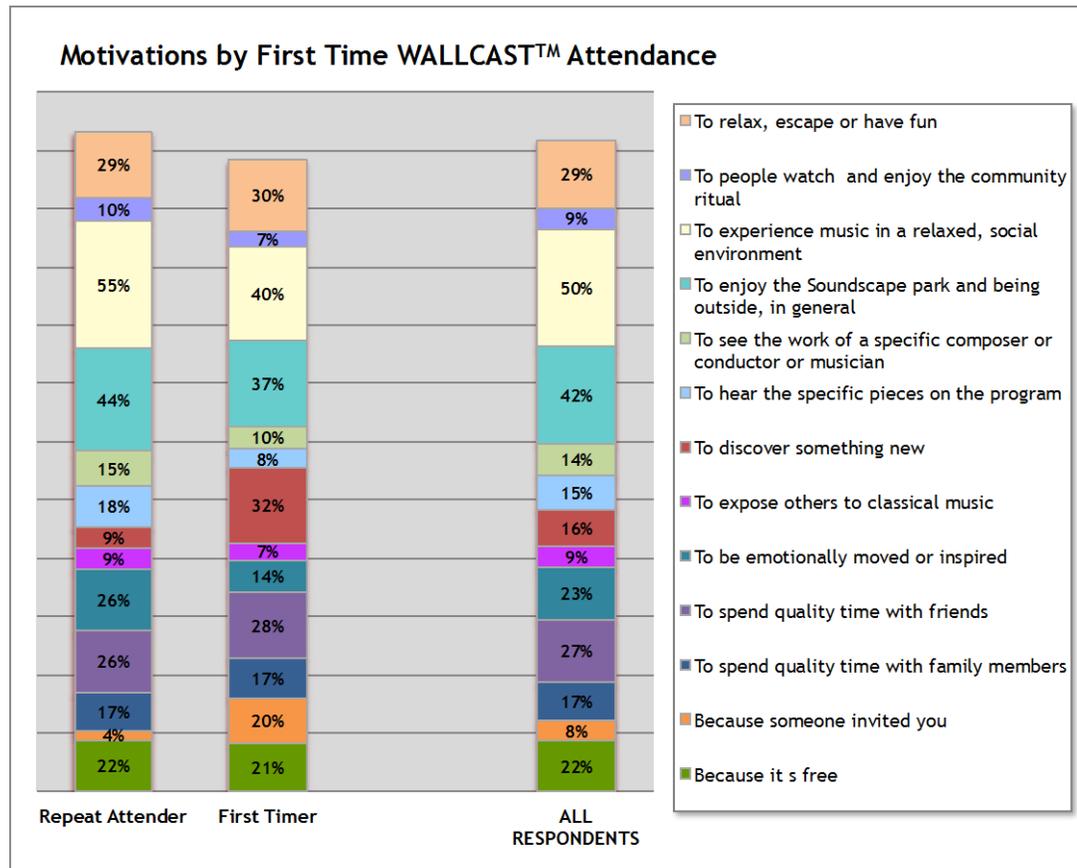
When asked why they attended tonight’s WALLCAST™ concert, a majority of respondents cited at least one social motivation out of 13 possible options (multiple responses allowed; see Figure 7 below):

- Half of all respondents came “to experience music in a relaxed and social environment;”
- 44% said they came to “to spend quality time with family” or “friends;”
- 42% to “enjoy SoundScape park and being outside in general;”
- 29% came to simply “relax, escape and have fun;”
- 9% came to “expose others to classical music;”
- 8% came “because someone invited me;”
- 9% wanted to “people watch and enjoy the community ritual”.

This blend of musical and social motivations very much underscores the qualitative data from the interviews and focus group discussions.



Figure 7: Motivations to Attend WALLCAST by First-Timer Status



As expected, social influence is more important for first-time attenders, with 20% citing “because someone invited me” compared to 4% of repeat attenders. One might infer that one out of every five WALLCAST™ attenders is proselytizing for the format by inviting friends.

Repeat attenders, on the whole, cite more reasons for attending WALLCAST™ concerts. They are still highly motivated by spending time with others, but are also much more likely to cite artistic reasons for attending, like “to be emotionally moved or inspired” (26% vs. 14% for first-timers), “to hear specific pieces on the program” (18% vs. 8% for first-timers), and “to see the work of a specific composer, conductor or musician” (15% vs. 10% of first-timers). This is not surprising, given that first-timers are less experienced with classical music and less likely to be familiar with repertoire and composers, and therefore less driven by specific program elements in deciding whether or not to attend. In fact, the WALLCAST™ audience is a highly eclectic mix of newcomers to classical music and veterans who do the inviting.

Similarly, younger respondents – who are more likely to be first-time WALLCAST™ audience members – are more likely to come “because someone invited me” (17% for respondents under 35 vs. 7% to 9% for other age cohorts), as well as “to discover something new” (23% for respondents under 35 vs. 13% to 16% for other age cohorts). The desire for social interaction is not unique to younger WALLCAST™



guests (see Figure 8). While other research on audiences for traditional (indoor) arts programming typically finds that younger audiences are significantly more likely than older audiences to be driven by social motivations, the importance of social motivations among WALLCAST™ audiences changes little across the age cohorts, with only older respondents (over 65 years) less likely to come to spend time with family.

Figure 8: Motivations to Attend WALLCAST by Age

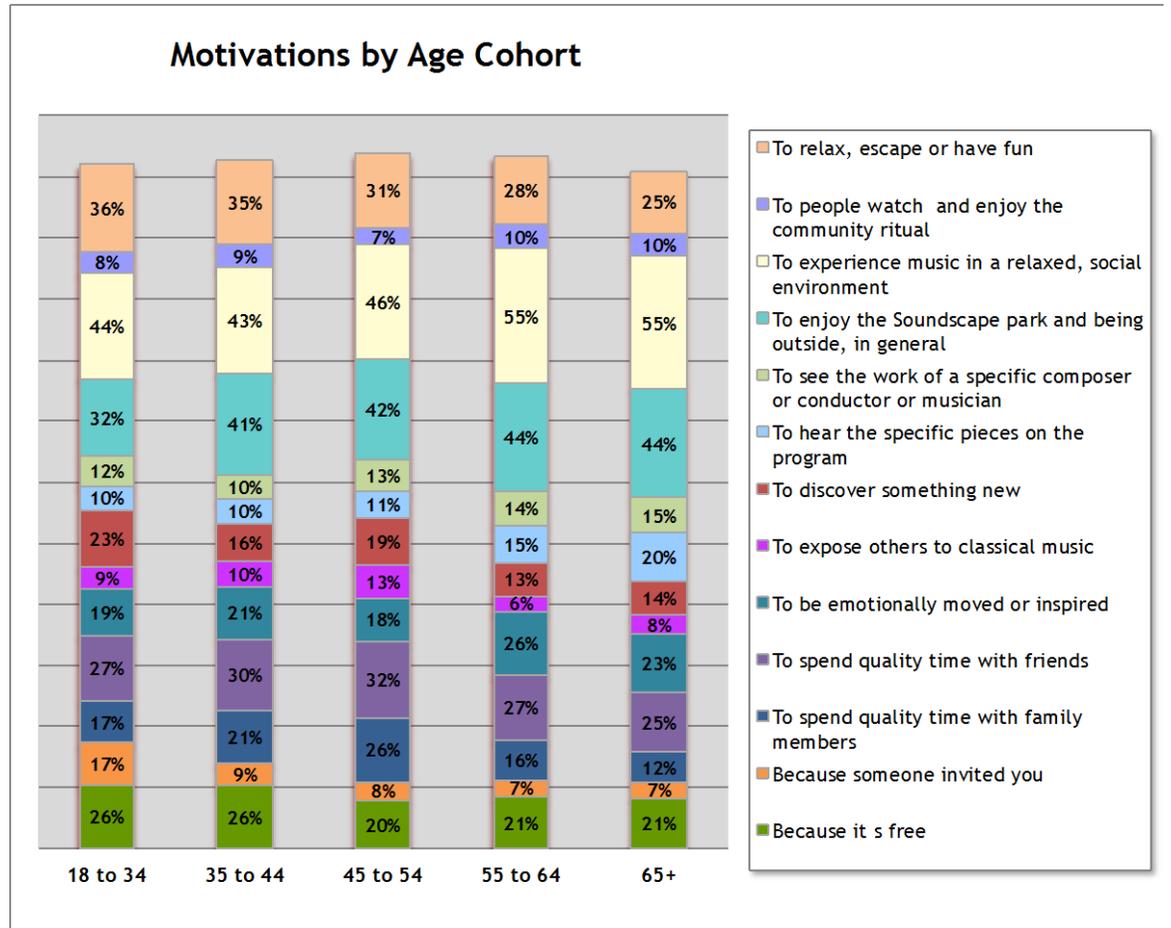


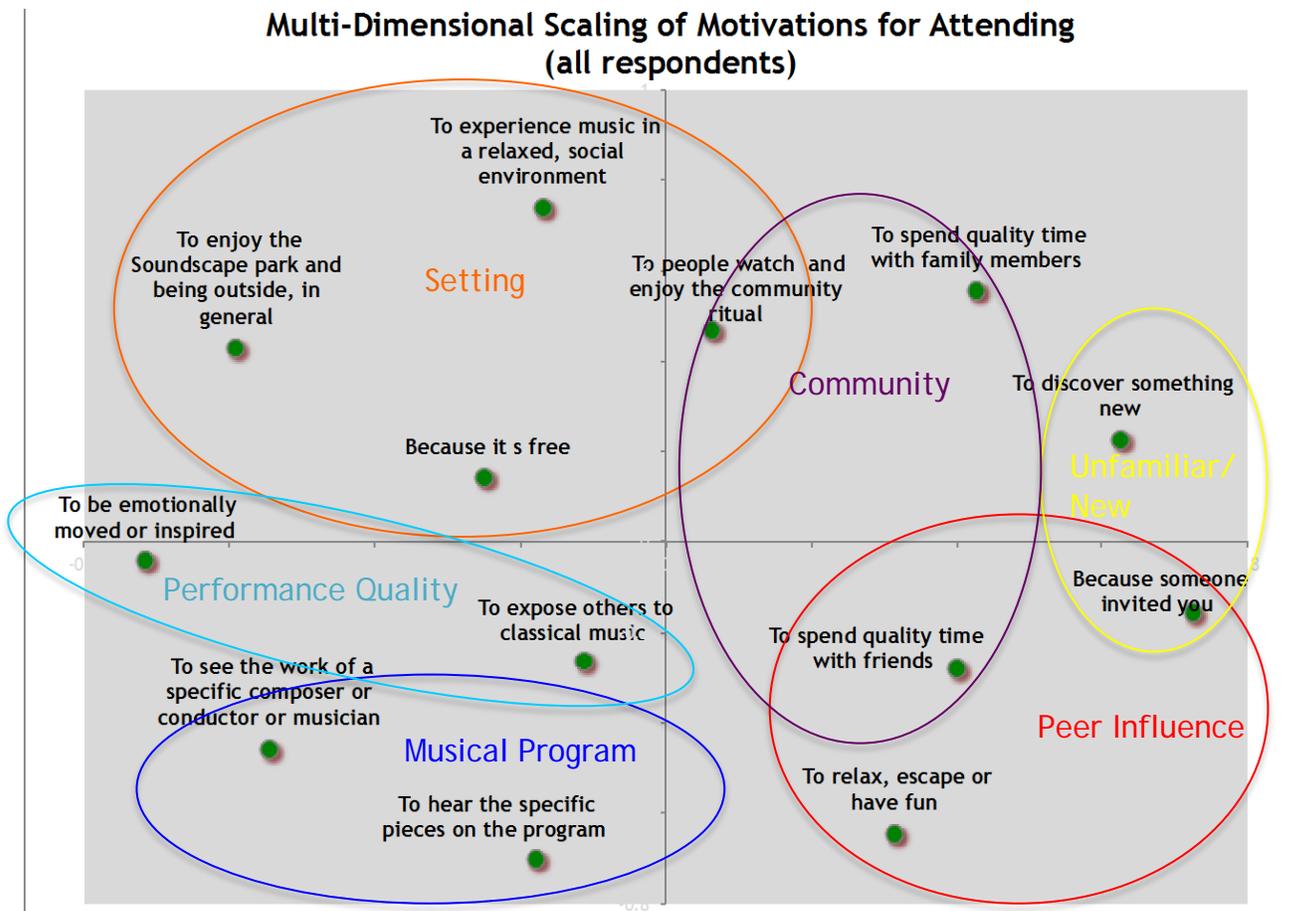
Figure 9 illustrates one way of visualizing motivational data using a technique called multi-dimensional scaling, which places each of the individual motivations in a two-dimensional space, allowing the researcher to see groupings of motivations and infer the meanings of the two axes. Results suggest that motivations naturally group into six different, yet overlapping dimensions of motivations, underneath three larger meta-themes:

- Social Fulfillment and Sense of Belonging
 - Peer influence: people who come because someone invited them; most likely friendship groups who are seeking to have a relaxing fun time



- Open to new experiences: people who are invited by others are also open to having a new experience
- Desire for community: people who want to be part of a larger community framework, also typically part of family groups; they like to both people-watch and to engage in conversation with others
- Setting and Casual Atmosphere
 - Outdoor environment: people who really enjoy the experience of music in a different setting, outdoors under the stars in a relaxed environment where they can choose where to sit, move around, etc.
 - Free: people for whom the barrier to entry is removed because it is always free
- Music and Affirmation
 - The specific program: people who attend for specific musical programs
 - The performance: people who seek to be moved by a great musical performance, or affirmed by experiencing something familiar that they already know they like

Figure 9: Relationships and Patterns of Motivation

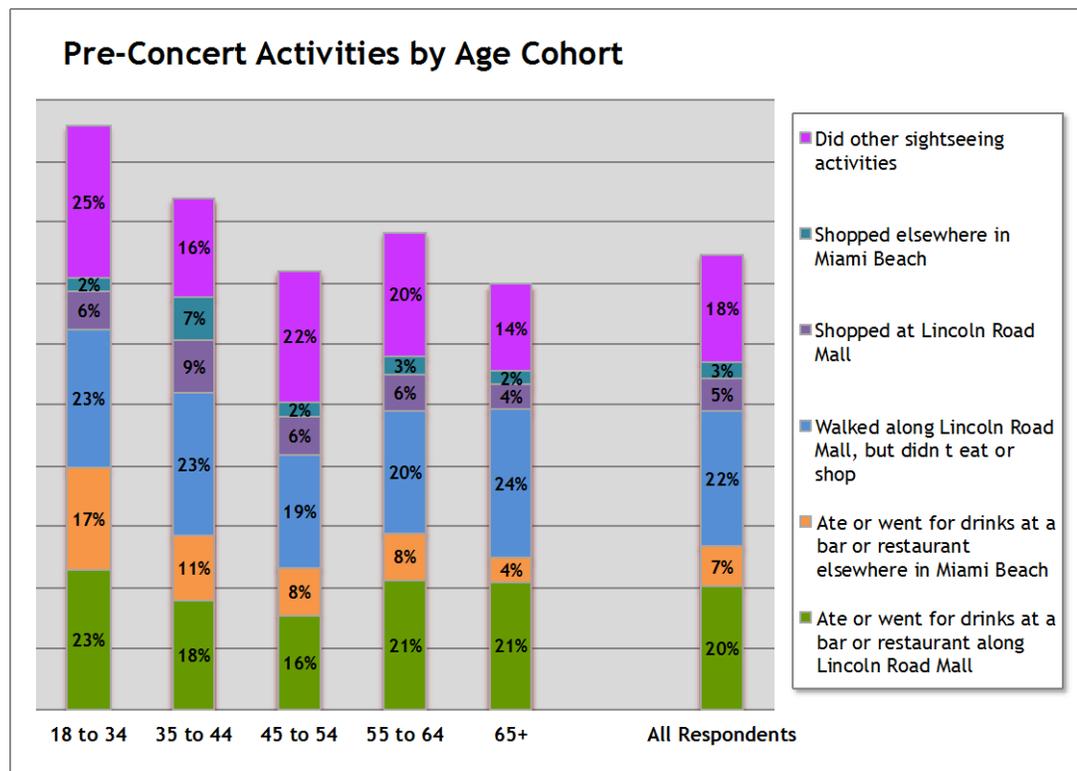


Qualitative data provides further nuance to these findings and underscore the powerful social dynamic. For example, one focus group participant first discovered WALLCAST™ when she was driving by SoundScape Park and, seeing all the people in the park, wondered what was going on. It was the crowd of people – the community feel and energy – that attracted her initially. Several interviewees reported bringing family or friends from out of town to WALLCAST™ concerts, sure that they’d enjoy the outdoor setting, listen to some great music, and have a good time together – a quintessential Miami experience.

Engagement, Satisfaction and Fulfillment

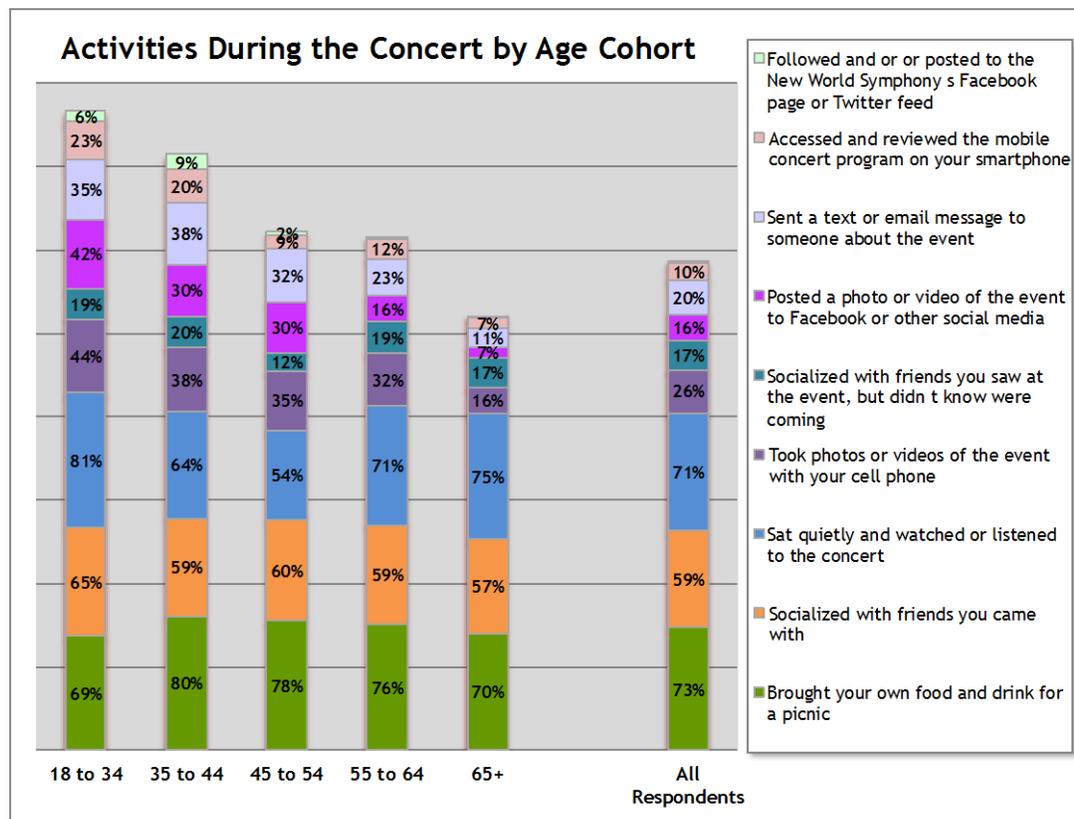
The activities that take place around the actual concert – “the before, the during, and the after” - are what make a WALLCAST™ experience special for so many. Focus group participants described an elaborate procession of activities – arriving an hour and a half to two hours before the concert, claiming a prime space on the lawn, setting up chairs, blankets, and food with excitement and anticipation of the evening to come. Once settled in, the social interaction begins – greeting old friends, making new acquaintances, sharing food and drink, and, of course, the people-watching. By the time the concert starts, audience members may find themselves with new friends.

Figure 10: Report of Pre-Concert Activities by Age



Survey results suggest that Lincoln Road Mall is a significant resource for WALLCAST™ audience members. One in five report eating at a restaurant or going for a drink on Lincoln Road beforehand, and another 22% strolled along the mall without shopping or eating, but likely for window-shopping and people watching (see Figure 10). Nearly three quarters reported bringing their own food and drink to SoundScape Park, and six in ten reported socializing with the friends they came with (see Figure 11 below). Not everything about the WALLCAST™ experience is pre-planned. Seventeen percent of survey respondents reported socializing with friends they saw at the event but didn't know were coming, and many guests (e.g., 40% of younger adults) are spontaneously posting to social media.

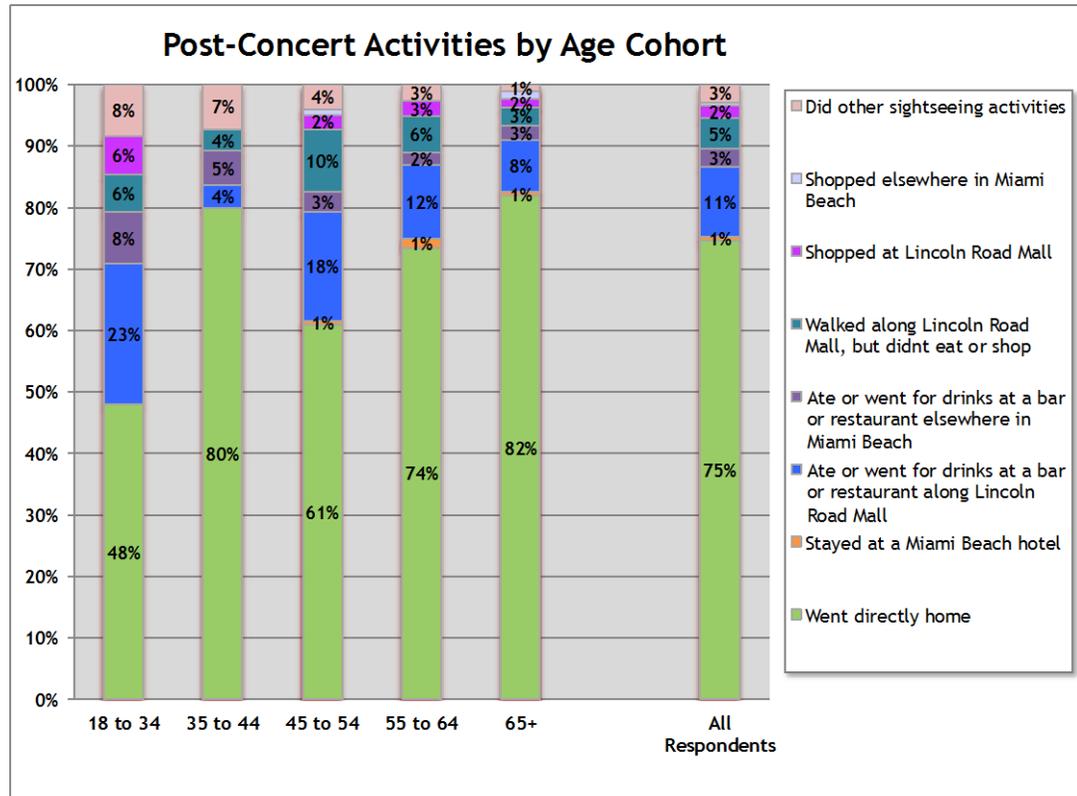
Figure 11: Report of Activities During the Concert



Most WALLCAST™ audience members go directly home right after the concert ends (75%). Some focus group participants said they sometimes leave a little early, either to avoid the back up of cars leaving the parking garage or to make sure that children can get to bed at a decent hour. Most discussion participants said that they usually don't rush right off, but leisurely pack up their things, chatting with the nearby neighbors and/or friends about the concert. Only one or two mentioned going out somewhere afterwards. Not surprisingly, younger respondents were more likely to state that they went out after the concert (31% went out to eat or drink afterwards either on Lincoln Road or elsewhere).



Figure 12: Post-Concert Activities by Age



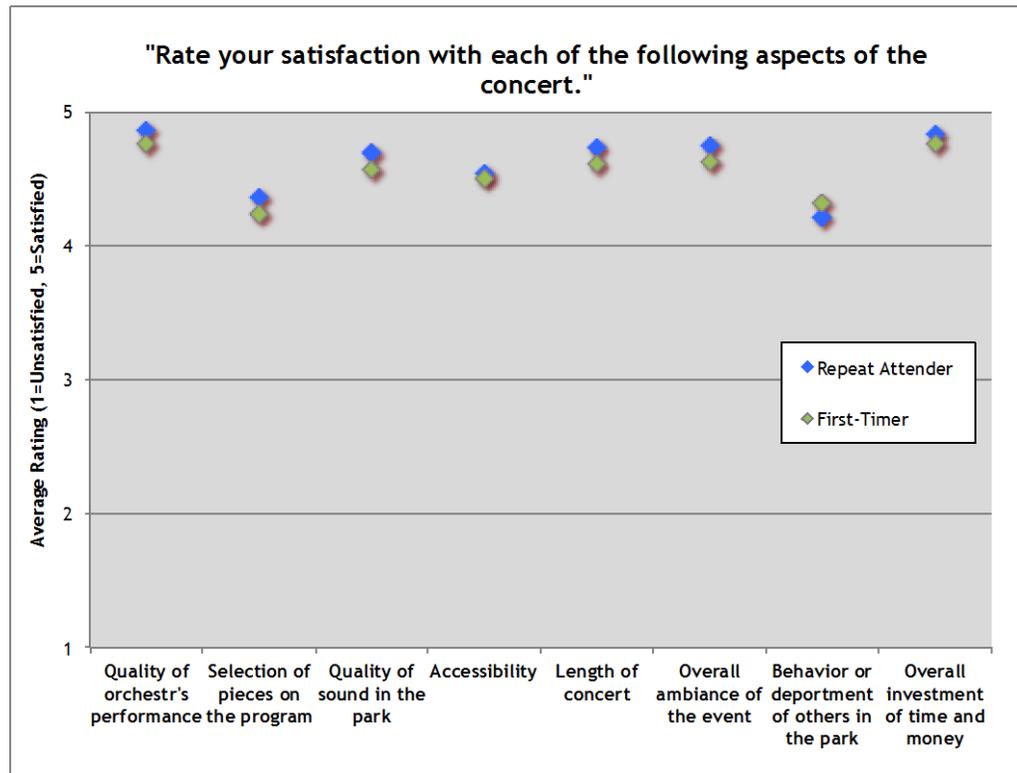
Satisfaction and Fulfillment

Overall, satisfaction levels are high on all program elements, and across all programs, with average rating scores ranging between 4.2 and 4.8 on a scale of one to five (see Figure 13). Repeat attendees reported slightly higher levels of satisfaction, with the exception of “behavior or deportment of others in the park,” suggesting that satisfaction increases with dosage (i.e., the more WALLCAST™ concerts you attend, the more satisfied you are with the overall experience).

Further statistical analysis comparing satisfaction with individual program elements and overall satisfaction suggests that “overall ambiance” has the strongest positive association and influence on overall satisfaction with “investment of time and money.” Results suggest that variation in overall satisfaction can be explained 68% of the time by variation in satisfaction with overall ambiance, and vice versa (Pearson correlation coefficient – measurement of the linear relationship between two variables – is .68; not shown). These results further emphasize the importance of all of the factors that contribute to the overall ambiance of the WALLCAST™ event – the aesthetic quality of the park setting, the crowd itself as well as the welcoming atmosphere created by NWS – to whether or not one walks away feeling like it was a successful evening.



Figure 13: Satisfaction with Program Elements



The quality of the orchestra's playing, and the quality of the audio experience in the park, are more highly correlated with satisfaction than the selection of individual pieces on the program.

The main criticism of the experience is the potential for too much talking, which distracts some from listening to the music, and errant cigarette smoke. Older interviewees were more likely to note the smoke as a problem. As might be expected, those who arrive with the primary motivation of having a high quality musical experience are more likely to complain about the ambient noise and talking. As one focus group participant explained, *"Once they [audiences] arrive, it's conversation time. I really do come here because classical music is that important to me, not because I want to be navigating amongst groups of gossips and what not."*

The intrinsic emotional, intellectual and aesthetic impacts of WALLCAST™ concerts varied from program to program. For example, the *New Works* program on January 31st received significantly lower emotional resonance and other impact ratings compared to other WALLCAST™ programs.

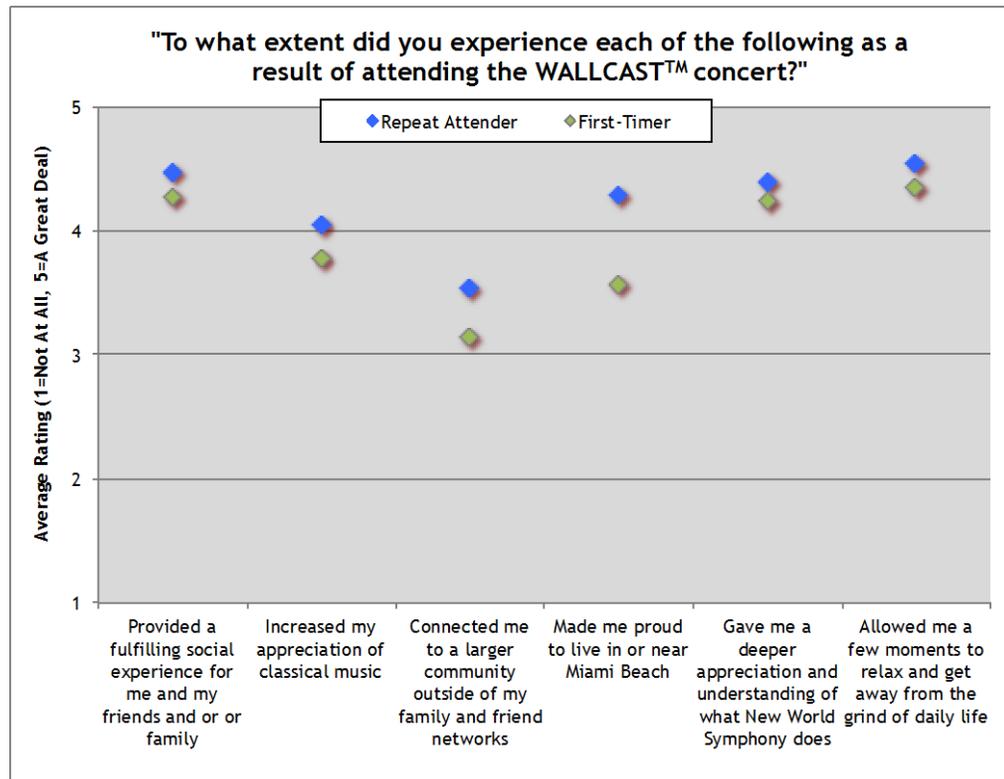
When comparing the intrinsic impact of the WALLCAST™ concert to other NWS formats, it is important to note that WALLCAST™ concerts are not a substitute for an educational concert experience inside the concert hall. All impact scores related to aesthetic growth were higher for other NWS formats, like Encounters, than for



were it to go away. One interviewee called WALLCAST “one great landmark,” and another lamented that she would lose her “bragging rights” if it were to go away.

Focus group participants described similar habits and sentiments. They referred to their “usual” way of preparing for a WALLCAST™, demonstrating how it has become a regular and valued part of their life. Their responses provide additional evidence of the tremendous sense of ownership that many have for WALLCAST™ programs, in particular those who’ve been coming a long time.

Figure 15: Achieved Outcomes of WALLCAST™ Experience



Further statistical analysis exploring the relationship between outcomes and overall satisfaction shows a moderate relationship between a respondent’s overall satisfaction and relationship to New World Symphony. “A deeper appreciation and understanding of New World Symphony” explains about 42% of the variation in response to overall satisfaction (Pearson’s correlation coefficient of .42; not shown).

Based on their experience, 96% of respondents are highly likely to recommend a WALLCAST™ to a friend or family member who hasn’t been before (rating of 4 or 5 on a scale of 1 to 5 from “not at all likely” to “very likely”). Most of the focus group participants are WALLCAST™ cheerleaders, telling everyone in their office, apartment building and on social media about WALLCAST™ concerts. One woman recounted how she invited a friend, who now attends regularly, and has in turn invited her friends, who have invited others, and so on. Both interviewees and focus group participants described how they message about upcoming concerts widely across their



social networks, whether through email or text messaging, and are excited to run into friends and neighbors who start to come independent of their invitation.

The unique amalgamation of setting, social diversity, and quality of the musical experience defines the WALLCAST™ experience. When asked what would be lost if WALLCAST™ were to be cancelled, interviewees talked about the great loss to the community as whole, beyond their enjoyment. It would be a “tragedy” and “really unfortunate” to lose this community resource which offers “an open door to the community” allowing more people to experience classical music and connect to one another. As one interviewee summarized: *“I would feel like a piece of my heart is cut out [if WALLCAST™s were to disappear]. Seriously, it's the greatest thing you can do – a free night out, and you come away enriched and happy and fulfilled.”*



The Philanthropic Argument for WALLCAST™

A public/private partnership from the start, the WALLCAST™ concept stemmed from a marriage of the City of Miami Beach’s requirement for free public access to SoundScape Park (which is owned by the City) with NWS’s mission to engage the public in its educational work. New World Symphony plans to continue offering these free programs, even though the cost to maintain them is high, and likely will increase over time as maintenance and technology upgrades become necessary.

Several generous donors helped to underwrite the initial technology, equipment and staffing costs required to produce WALLCAST™ programs, and continue to support them. In 2014, NWS secured a significant multi-year sponsorship from Citi, an important partnership that contributes much to the continued growth and success of the program. However, it is clear that in order to be sustainable in the long-term, NWS will have to develop a reliable stream of funding for WALLCAST™.

This section delves into the motivations among existing donors for supporting NWS and its various programs, including WALLCAST™ concerts. Drawing from the results of a survey of NWS donors, the salience of the WALLCAST™ program is tested against other giving priorities. Finally, drawing from both qualitative and quantitative data, the main arguments for supporting WALLCAST™ concerts are laid out (i.e., the case for support), along with recommendations for further development of the program.



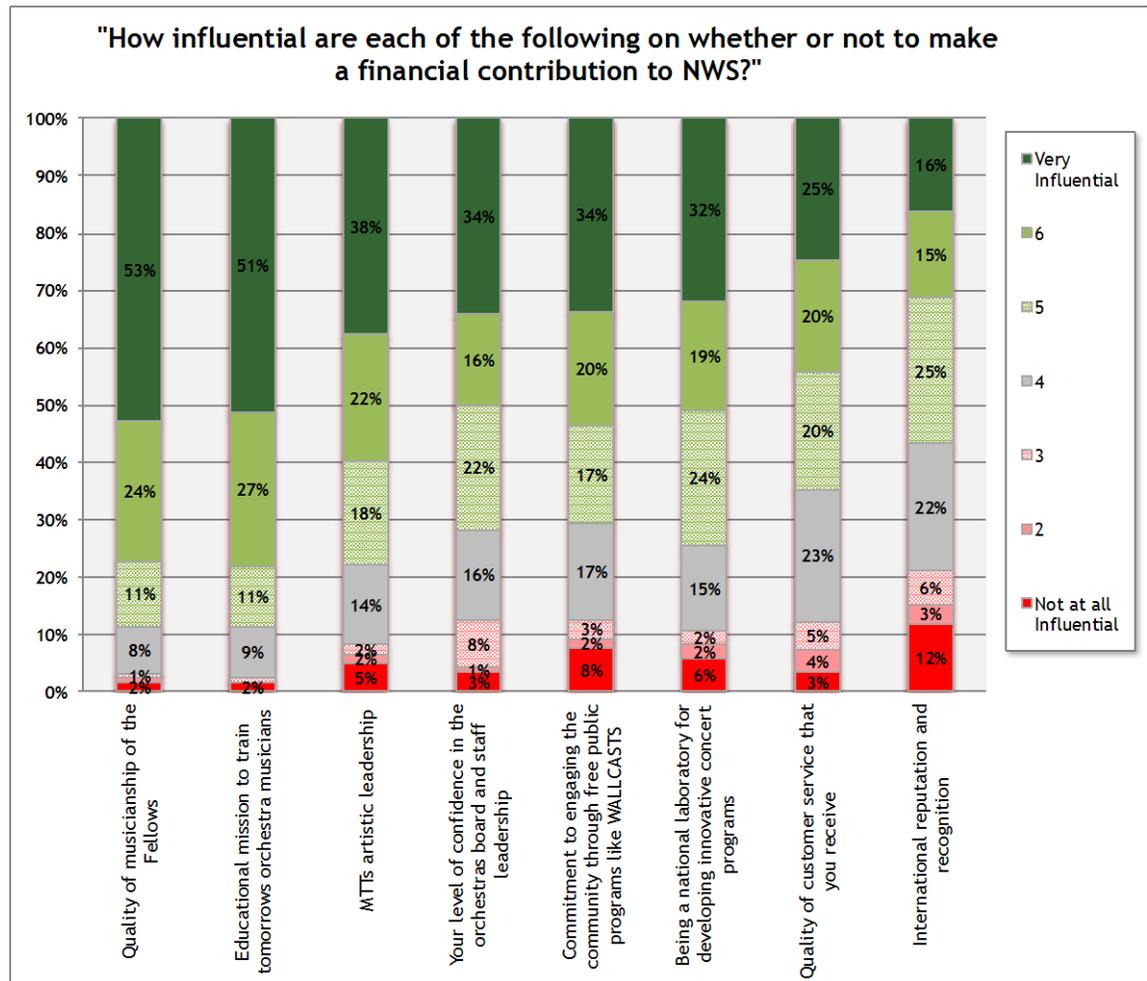
General Motivations and Interest in Supporting NWS and WALLCAST™

Just 14% of donors who responded to the online survey reported that their NWS gift was designated for WALLCAST™ concerts specifically. Another 14% give for the Building Fund for New World Center, 18% for Fellows' Scholarships, and 38% stated that their gifts are undesignated. While the 14% figure may not seem impressive, it suggests that there is an established pattern of WALLCAST™ giving amongst a small cohort of donors.

In general, NWS donors are driven to support the organization because of the “quality of Fellows’ musicianship” (53% ‘very influential’) and the organization’s “educational mission to train tomorrow’s orchestra musicians” (51% ‘very influential’; see Figure 16). Note that NWS’s “commitment to engaging the community through free public programs like WALLCAST™” is the fifth most influential factor in donors’ giving, on par with their “level of confidence in the orchestra’s leadership” (both factors cited by 34% as ‘very influential’). The least influential motivational factors for giving include “international reputation” and “quality of customer service.” It is clear that the core mission – to educate tomorrow’s musicians – and the resultant quality of their music making – supersedes other programs and/or characteristics of the organization in donors’ minds. The analysis further suggests that many donors hold several of these factors as important to their rationale for giving.



Figure 16: General Motivations for Giving to NWS



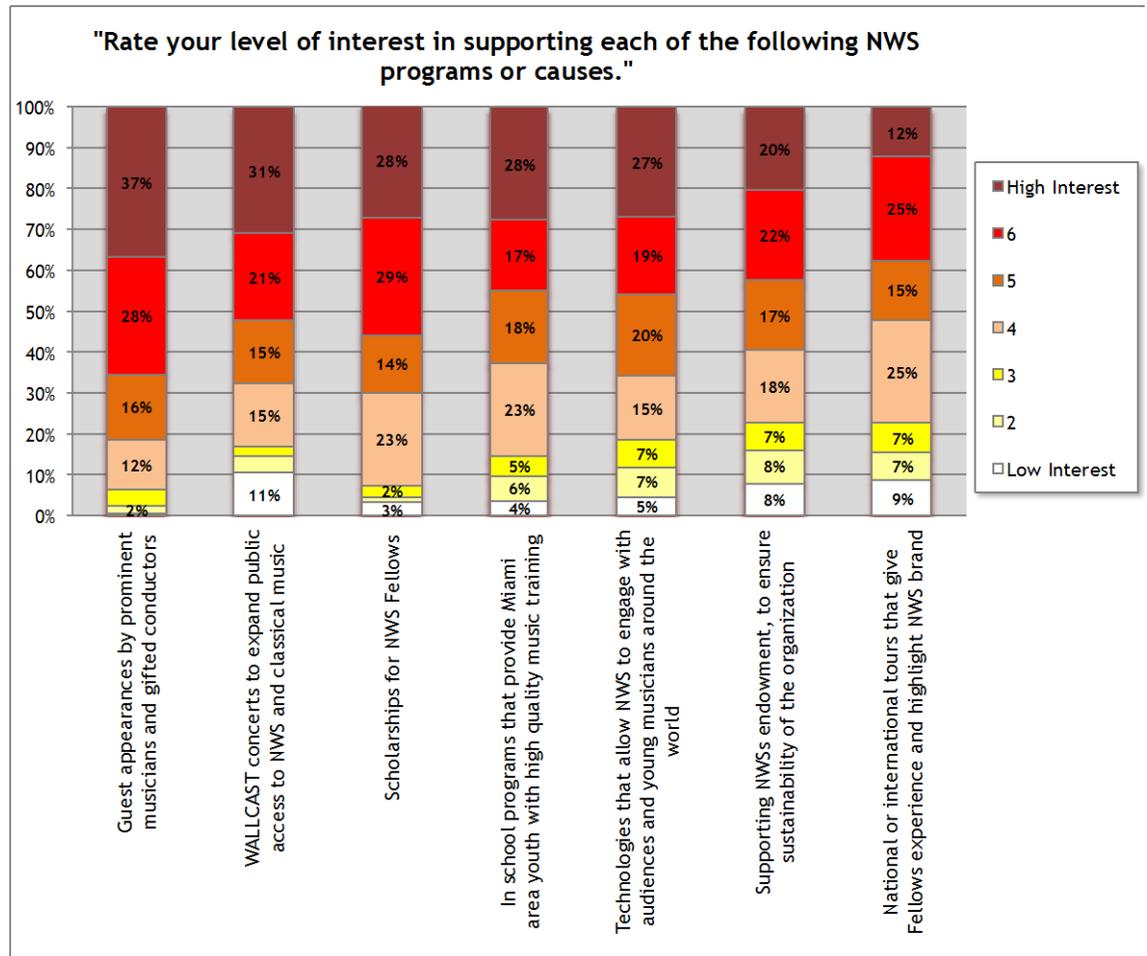
When questioned about their interest in supporting seven different “causes” within the NWS mission portfolio, quality of performance remains a high priority (see Figure 17). Thirty-seven percent of respondents expressed high interest in supporting “guest appearances by prominent musicians and gifted conductors” (rated 7 on a scale of 1 to 7, from low to high interest). “WALLCAST™ concerts to expand public access to NWS and classical music” received the second highest rating, with 31% expressing high interest, followed by “scholarships for Fellows” – a close third (28%). It is interesting to note that interest in supporting accessibility programs like WALLCAST™ concerts rank high compared to other causes, while it is relatively lower in its current influence on donors’ decisions to give overall.

When asked a follow-up open-ended question about motivations for giving specifically to WALLCAST™ programs, many responded that WALLCAST™ concerts are important because they provide access, the opportunity to introduce others – in particular young people – to classical music, and to NWS. A few responded that they enjoy watching music under the stars, and many others cited their own personal experience of WALLCAST™ in their praise of the program. One respondent who



doesn't enjoy the WALLCAST™ experience as much as sitting inside noted that she still recognizes the importance of programs that introduce others to the live music experience. Overall, these results suggest an untapped potential within NWS current donor pool around WALLCAST™ programs – as many give to the general fund, they might be encouraged to increase their annual gift to support this important area of programming.

Figure 17: Interest in Giving to NWS



Four Philanthropic Arguments

A thorough review of qualitative data from stakeholder interviews, donor surveys, and focus groups highlights four overarching sets of qualities and benefits that WALLCAST™ provides, and that could be leveraged to cultivate increased funding from the public, private and corporate sectors. Further testing will be needed to better understand which arguments are most salient to which stakeholders.



Overview of the Four Arguments

1. An Argument for Sowing the Seeds of Appreciation. WALLCAST™ concerts create and foster fans of classical music by removing some of the traditional barriers that keep many from attending classical music concerts, such as cost, lack of social support, and advance



planning. Many who experience WALLCAST™ become missionaries for classical music and NWS, inviting friends and neighbors, who in turn, become fans and pass on the invitation to others. Parents see WALLCAST™ programs as opportunities to introduce their young children to live classical music, thereby sowing seeds that will blossom into attendance as adults.

2. An Argument for Placemaking. WALLCAST™ concerts provide a safe and welcoming environment where people from all age groups and cultural backgrounds connect. It is a “*global meeting house*” - as described by a focus group participant and mirrored in similar statements by others - where community connection is instant and sharing is a core value. The WALLCAST™ experience builds community and positions NWS as a leader in the emerging field of creative placemaking.
3. An Argument for Building Miami-Dade’s International Reputation. WALLCAST™ instills a sense of pride in Miami and symbolizes its rise as a cultural mecca. The opening of the New World Center raised the visibility of Miami Beach and catapulted NWS to a new level of international prominence. The innovative and technologically advanced WALLCAST™ experience, along with other signature art events, embodies the best of what Miami-Dade has to offer the world.
4. An Argument for Leading through Innovation and Experimentation. WALLCAST™ embraces experimentation and creativity, with the fusion of high quality performance, sound, and video – pushing the boundaries of live digital presentations. These events are a manifestation of NWS’s evolution as a laboratory for classical music, not just in educating and shaping the next generations of great classical musicians, but also in developing and implementing new tools to bring classical music to a broader public.

Further discussion of each argument follows, with references to research findings that support the argument.



Argument #1: WALLCAST™ concerts create and foster fans of classical music.

WALLCAST™ concerts represent a low-risk and highly accessible entry point into the world of classical music. Typical barriers to attending classical music concerts, such as cost of tickets, discomfort with being in a concert hall, formality and unfamiliarity of the music and setting are nonexistent. Supporting WALLCAST™ concerts is an investment in the future of classical music. Moreover, WALLCAST™ concerts provide NWS supporters with an important means of introducing their friends and family to



NWS, thereby activating patrons in the essential work of building tomorrow’s audience. This really works because the WALLCAST™ programs are designed specifically to engage the audience in the mission of NWS (e.g., exposure of the Fellows through video profiles and appearances/mingling in the crowd during and after concerts).

Seventy-two percent of respondents to the donor survey cited accessibility and the opportunity for those without the means to attend regular concerts as a primary reason why they would support WALLCAST™ concerts. Several donor survey respondents specifically noted that it is easy to invite friends, as there are no barriers or obligations: *“I like going to them, it’s easier to bring friends to a free event and it’s a nice option on nights I get home early and did not make plans.”*

Focus group participants also talked a lot about inviting friends, co-workers, neighbors, out-of-town family, and even strangers. Two mentioned how they use WALLCAST™ concerts specifically to invite people in hopes of ‘converting’ them into fans of classical music and NWS. One focus group participant recounted a story about how at one concert she ran into a family she’d brought to an earlier concert for the first time. This other family came back on their own, and brought others. Another said, *“Almost every person we’ve brought has come back.”* His partner then chimed in: *“I’m converting some people who don’t have a clue about the arts and my next step is to bring them out here.”* Focus group participants and stakeholders talked about the addictive nature of the event. It is such a great time, they said, from the very first experience. *“You come*



once and you are hooked.” One focus group participant remembered a time when it rained, and nobody left. *“This is beautiful,”* he said.

There were many comments from donors, interviewees and stakeholders about the value the WALLCAST™ concerts provide for families. One interviewee commented how important it has been for her to introduce her four-year old son to classical music, but that going to a concert inside was out of the question. She is grateful to NWS for this opportunity that makes it easy for her to share her love of music with her family. This is a powerful, emotional argument that speaks to the passing along of values and ideals from generation to generation, and to the long-term sustainability of the art form.

Argument #2: WALLCAST™ provides a safe and welcoming environment where people from all backgrounds connect.

The WALLCAST™ is *“a global meeting house. [It] cultivates a connected world.”* The space and experience manifests what sociologist Elijah Anderson calls *“a cosmopolitan canopy,”* a place that offers respite from the stresses of daily life, where people from diverse backgrounds *“engage with one another in a spirit of civility, or even comity and goodwill.”* Community building was especially important and compelling to a stakeholder representing the funding community: *“[We are] interested in WALLCAST™ as a public space to come together.”* The funder seeks to *“elevate the conversation around public spaces because it’s not being talked about enough”* and sees WALLCAST™ concerts as a public space that can help to further this conversation at the community level.



Unlike traditional classical music concerts, where people don’t talk to each other, and are expected to behave in certain ways, WALLCAST™ concerts invite, and even celebrate, spontaneous, unpredictable and uncontrolled social interaction. Whereas the “inside” experience evokes perceptions of stuffiness and elitism, the more informal “outside” experience is more *“achievable”* for people to

come. WALLCAST™ concerts are the most successful forum through which NWS connects to greater Miami Beach residents. *“It’s the umbilical cord to the community. NWS has found a way to take an educational mission and make it relevant to the community.”* One focus group participant commented, *“I have seen homeless [people] who stop and listen to the music,”* and went on to say that it wasn’t that he preferred the outside experience to the inside experience, but that outside he feels *“like I am part of a community, [part of] the city.”* Fostering this sense of place is at the heart of the creative placemaking movement.

There is a palpable energy that many feel far in advance of even arriving on site at the park to set up chairs and blankets. The ritual and anticipation of inviting and planning with others, even if it is a last minute plan, or knowing that you will run into others you already know even if you are going alone, helps to build, sustain and expand that community spirit from WALLCAST™ concert to WALLCAST™ concert and hopefully even beyond. Focus group participants spoke at length and with high emotion about the communal spirit of the event, and shared anecdotes about engaging with others as evidence of community: *“It becomes an instant community. One woman was offering [to exchange] brownies for wine because she ran out of wine. [You] become friendly and everyone talks.”* A majority of donors argued that one of the WALLCAST™ concert’s greatest strengths is its ability to bring people together, *“across all economic and social strata.”* This is another powerful argument that taps into the potent value systems surrounding social justice, revitalization and collective self-efficacy.

Argument #3: WALLCAST™ instills a sense of pride in Miami and its cultural opportunities.

WALLCAST™ concerts offer a high profile, highly visible sign of Miami’s emergence as a world-class city. Thirteen percent of respondents to the donor survey mentioned the role of WALLCAST™ concerts in helping to bolster Miami’s identity: *“One of the best things in Miami Beach are the WALLCAST™ concerts!”* These events signal that Miami is a place where everyone has access to culture. As one focus group participant said, *“It puts us on the map. Symphonies all over the world are looking to NWS and the WALLCASTs™ for the experience.”* Another stakeholder attributes the changing perception of Miami Beach, in part, to the WALLCAST™ concerts: *“It’s also an important piece of the changing image of the City of Miami Beach. When you combine it with Art Basel, it signals that Miami Beach is a place of culture and creativity and design.”*

Many interviewees argued that the WALLCAST™ concert is now one of Miami-Dade’s signature or landmark experiences, something they want to share with out-of-town visitors because they are confident they’ll enjoy it, and because they enjoy showing off Miami at its best. Donors and stakeholders who haven’t been to a WALLCAST™ concert still consider it *“a point of pride”* for Miami and NWS, and tell people they should go. WALLCAST™ images have even been used to promote tourism in Miami, touting the great cultural experiences, and the marriage of landscape, beauty and unique setting of SoundScape Park as quintessentially Miami. One donor survey respondent argued that WALLCAST™ concerts are an *“innovative approach [to presenting classical music] that’s made a name for Miami and is spreading nationwide.”* Other orchestras embarking on similar digital media efforts in their own communities and new facilities (Kennedy Center, etc.) have turned to NWS for advice and ideas.





For many the loss or reduction of WALLCAST™ concerts would be a significant loss, because an important community resource that many have come to count upon would be lost. *“There aren’t that many world-class things that happen in Miami (that are non-elitist),”* according to one stakeholder. The sense of loss would not just be about missing the free, high quality classical music performances, but also the lost opportunity and space for community building: *“it would be a loss of social cohesion programming.”* In short, WALLCAST™ projects a positive view of Miami-Dade to the outside world. This argument taps into the sentiment of civic pride and draws on competitive feelings about enhancing Miami’s standing against other urban centers as a world-class cultural destination.

Argument #4: WALLCAST™ embraces experimentation and creativity, with the fusion of high quality performance, sound, and video – pushing the boundaries of live digital presentations.

WALLCAST™ concerts are the manifestation of NWS as a laboratory for classical music, creating innovative and quality musical experiences that harness the latest technology and talent. The “live” aspect of the experience is highly valued by all. Although some might come to watch pre-recorded concerts, there is something special about knowing the musicians and other audience members are just beyond the wall. It makes *“...you feel like you are there in the concert,”* according to one focus group respondent who went on to say it wouldn’t be as special if recorded. Because it is live, *“each second is a new experience...”* that has never been experienced before. Another participant analogized the WALLCAST™ experience to watching a live baseball game: *“You don’t know what’s going to happen next; it’s exciting.”*

In addition to the live component, WALLCAST™ audience members also get the opportunity to hear from the musicians before the concert through video introductions with the composer and Fellow soloists. These videos establish an important bond between the WALLCAST™ audience and NWS through the Fellows. The passion of these young musicians, as communicated through these introductory videos, and then through their performance, is *“revitalizing.”* Speaking of the videos,



one focus group participant said, *“There is such joy. You can’t help when you see that to be bullied and recharged by that.”* For some, it sets the tone for the remainder of the concert.



One of the key seed donors for WALLCAST™ concerts was originally inspired to support the project because of the innovative technological components involved in producing these events. *“[WALLCASTs™] are one of the most standalone experiences anywhere...,”* he said. *“[These] are people at top of their game [referring to videographers], and the investment in cameras was great.”* He recognized that investment in technology is just one component of the whole, and that the preparation and utilization of this equipment is what makes for an excellent experience. Similarly, focus group participants also praised the people behind the camera, appreciating the effort and creativity that goes into

every performance: *“Every season they try something different with the cameras. I really like that they are trying new things with the production. Last night they did more split screen, and I like that.”*

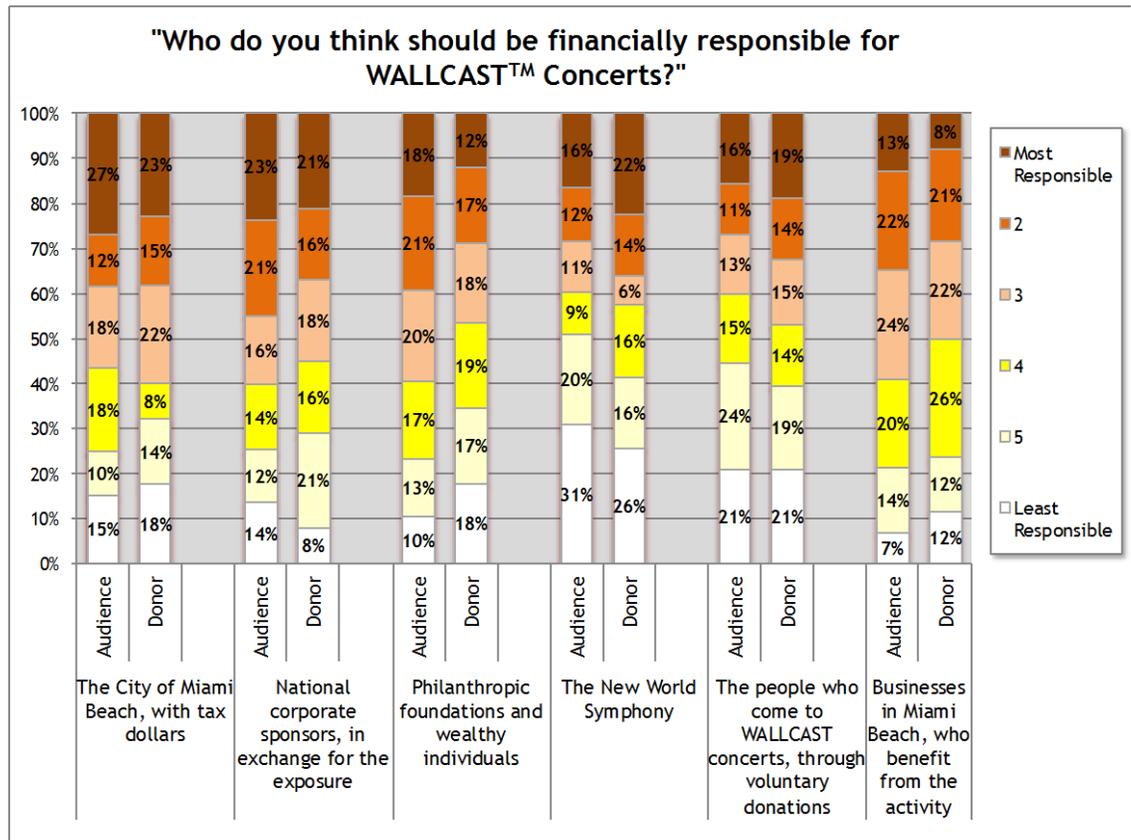
Another NWS donor lauded the use of technology as bringing the concert experience to a whole new level: *“Of course, being inside is fabulous, but being outside is incredible! You see the facial expressions. The sound blows you away. Anthony Tommassini of the NY Times said it was ‘the best sound on the planet.’”* One of the signature aspects of the WALLCAST™ experience is the close-up view – getting to track along with individual musicians, see a piano soloist’s fingers fly across the keys, and see the conductor’s face filled with drive and passion. *“What makes the production here so magical is I get to see the hands, the faces, the soloists,”* according to one focus group participant.

While most people experience pre-recorded (and heavily edited) digital presentations of arts programs, WALLCAST™ concerts have taken the next step, harnessing technology to create a high-definition, immersive digital broadcast of a live performance that allows audience members to step into the orchestra itself. *“You are there and you are focused like a laser.”* This argument resonates with the value system of innovation and experimentation, placing NWS at the frontier of digital video technology and sound installation that are rapidly redefining the live entertainment experience.

Potential Strategies for Raising Additional Funds for WALLCAST™

When asked who should be financially responsible for WALLCAST™ concerts, most audience members cited the “City of Miami Beach, with tax dollars” (see Figure 18 below). Next in line are “national corporate sponsors,” followed by “philanthropic foundations and wealthy individuals.” Although donor survey respondents aligned for the most part in regards to the ranking of responsible parties who should financially underwrite WALLCAST™ concerts, they were much less likely to select “philanthropic foundations and individuals” as most responsible, and more likely to hold NWS and people who attend WALLCAST™ concerts as most responsible. Overall both audiences and donors are conflicted about the responsibility of NWS to underwrite WALLCAST™ concerts, suggesting a need for better messaging about the case for support.

Figure 18: Ranking of Philanthropic Resources for WALLCAST™, Audiences vs. Donor Response



Even given these slight differences, overall survey results argue that audiences and donors alike view WALLCAST™ concerts as a public good for which the City should take some responsibility financially, and through which corporate sponsors can successfully leverage for brand awareness.



Response to Potential Fundraising Strategies

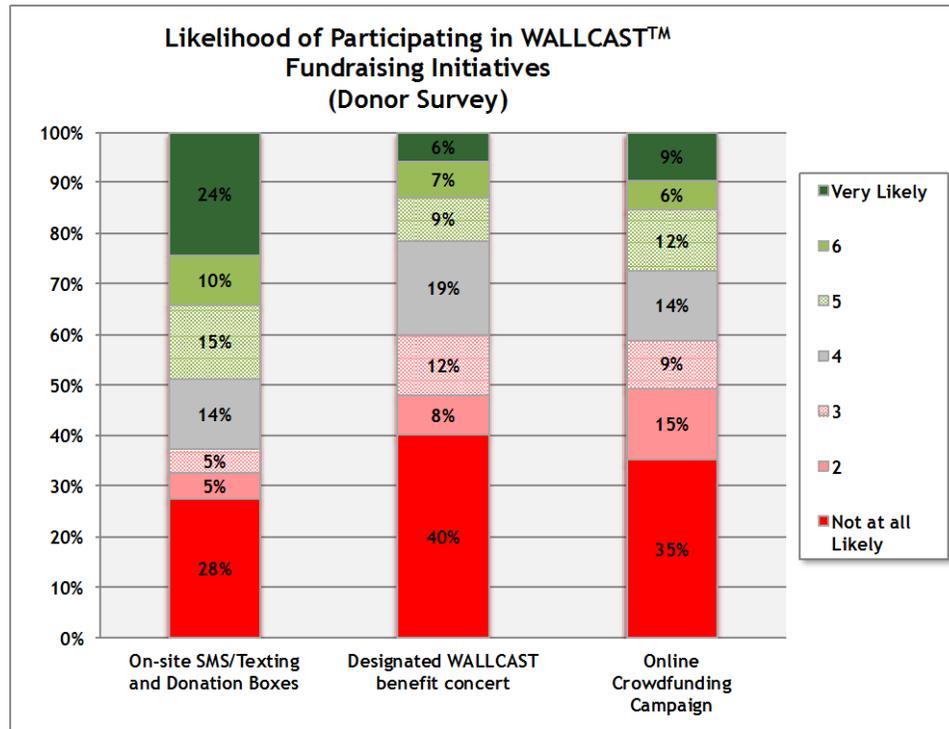
Specific strategies for raising funds for the WALLCAST™ program were tested on the donor survey. Respondents were asked to indicate the likelihood that they'd participate in any of three prospective fundraising efforts:

1. Suppose WALLCAST™ concert audiences were asked to voluntarily give small amounts to support WALLCAST™ concerts through a special SMS/texting number, or through donation boxes set up throughout Miami Beach SoundScape. How likely would you be to participate in this type of campaign?
2. Suppose NWS designated one WALLCAST™ concert each year as a benefit event to raise funds to support free outdoor programs throughout the season. At the event, a master of ceremonies would take pledges, much like fundraising drive on a public radio station. How likely would you be to attend this event, or participate in the fundraising drive?
3. Suppose NWS produced an annual online crowdfunding campaign to generate support for free outdoor programs throughout the season, using a website like Kickstarter or Indiegogo.com. How likely would you be to participate in this kind of campaign?

Results are illustrated in Figure 19. The highest level of interest among existing donors was reported for the on-site SMS/texting and donation boxes concept, while significantly fewer reported interest in the other two concepts. In regards to the third strategy (an online crowdfunding campaign), many donors reported that they aren't even familiar with the term. While these results indicate limited interest in these fundraising approaches among existing donors, they should be further tested with WALLCAST™ audiences.



Figure 19: Donor Survey Responses to Prospective Fundraising Strategies



Focus group respondents were somewhat polarized in their response to crowdfunding strategies, some wanting NWS to stay away from any activity that would imply that WALLCAST™ concerts were no longer free, while others said they would happily and readily give a little money if asked unobtrusively at a WALLCAST™ concert.

Excluding corporate and government support opportunities, the research holds implications for a range of potential fundraising strategies for WALLCAST™ concerts:

- The research suggests low-impact strategies when approaching audiences. For example, a slow and small SMS campaign and/or donation boxes strategically situated around the park during concerts, with a brief announcement, possibly integrated with the introductory video. Once or twice throughout the evening, instructions for making a small donation via SMS could be projected on the screen.
- The WALLCAST™ Concert Club, presented by Citi is a popular list and expanding with every concert. There may be ways to start activating and monetizing this group through small gifts (even in the \$5 range) to increase buy-in and participation from regular WALLCAST™ audience members. NWS might also consider leveraging the WALLCAST™ Concert Club with corporate sponsors, providing access to sponsors at certain giving levels.
- Citi has access to a prime seating section in the middle of the speakers towards the back of the main lawn area. NWS may consider expanding this seating



section by creating a designated “sponsor” section on the lawn to which other developers and business sponsors could have access to for a fee. Developers and other local businesses could purchase spots for their guests far ahead of a concert (like box seats at a sports stadium). The downside of this strategy, which is significant, is the risk of projecting a hierarchical VIP culture that runs counter to the core value proposition of the open-access experience.

- Some donors already specify their gift for WALLCAST™ concerts. But, as the previous discussions around motivations and interests in giving suggest, there may be a greater opportunity for increasing giving from individuals. This might take the form of a special capital campaign above and beyond annual giving campaigns, or via an “add-on” appeal layered on annual giving campaigns wherein donors are asked to increase their gift by a small percentage, earmarked for WALLCAST™ concerts. Ultimately, there may be a naming opportunity associated with the WALLCAST™ program.
- Yet another approach would be to assess a small surcharge on tickets to indoor concerts, with the proceeds designated for supporting WALLCAST™ concerts and other free outdoor programming.
- Although not based directly on the data, we suggest further exploration of a contemporary adaptation of the “telethon” concept. The basic idea is that one WALLCAST™ concert presentation each year would be designated as a fundraising event. While the event itself would still be free, any number of special crowdfunding activities could be built into the experience. For example, the concert could be positioned as the capstone celebration of a week-long online crowdfunding event.



Implications of the Research on Future Development of WALLCAST™ concerts and the Miami Beach SoundScape Park

Although WALLCAST™ programs as they exist now are highly fulfilling and successful from the audience's point of view, there are opportunities for creating greater value and expanding the reach of these programs. Following are several ideas arising from the focus groups and stakeholder interviews that might represent next steps in developing WALLCAST™ and SoundScape Park.

1. Test complementary digital programming.

Consider programming other concert or fine arts webcasts (both live and pre-recorded) onto the wall under a different, but related brand.

WALLCAST™ concerts are known for the “live” component, however, the wall and the desire for greater access to arts experiences is there, and could generate more interest and partnerships for NWS in future.



2. Include more educational content on-site right before and/or after WALLCAST™ concerts, such as an expanded trivia video reel before the concert, preview performances of the program outside on the lawn, and expanded video interviews with Fellows, visiting conductors and other guest artists. In addition, after the concert, NWS might take advantage of some audience members' lingering and natural desire to digest the experience by offering a post-performance Q&A with one of the Fellows.

3. Consider expanding the screening of live concerts to other underserved areas within greater Miami-Dade County. Transportation is a key barrier to engagement. One focus group participant described riding his bike over the bridge to attend concerts. Sometimes he runs late and misses out on a good seat if he isn't able to leave work early enough. Almost all stakeholder representatives mentioned transportation as a barrier to further engagement. Although SoundScape Park is currently a key characteristic and contributor to the WALLCAST™ experience, the concept of streaming live outside onto the wall of a building could be replicated in other neighborhoods to great effect, even without the world class equipment built specifically within the park. Such a program – taking WALLCAST™ concerts “on the road” – would further contribute to NWS's brand of openness, inclusivity and experimentation – music for all.

4. Engage more intentionally in placemaking strategies, leveraging WALLCAST™ and SoundScapeSoundScape Park. Both the Miami Foundation



and Miami-Dade Cultural Affairs stakeholders are steeped in strategies to promote creative placemaking, and encourage community engagement and development, leveraging the arts. Currently, when the wall isn't used for concerts or movies, it is the home of *Chronograph*, a site-specific video art installation commissioned and inspired by New World Center. NWS could partner with other artists to create rotating exhibitions of similar site-specific work, or other performance video pieces, in particular in coordination with Art Basel events. In addition, NWS could partner with other organizations and city agencies to broadcast important civic and national events, such as live broadcasts of presidential debates, making an important link between culture and civic engagement. In general, SoundScape Park holds much potential as a venue for participatory public art well beyond the WALLCAST™ concerts and other video programs, although significant additional capital investment would be required.

In some ways, the WALLCAST™ concept and experience is unique to SoundScape Park and New World Symphony and cannot be replicated except at extraordinary expense. There are aspects of the concept and experience, however, that are universal and scalable – coming together with friends, family and strangers, and seeking and creating community through shared artistic experiences. Further thinking as to how these elements might be “travelled” around Miami-Dade could be productive.



Appendices

Audience Survey Pre and Post-Performance Protocols -----	51
Intercept Interview Protocol -----	59
Focus Group Discussion Guide -----	62
Donor Survey Protocol -----	65
Stakeholder Interview Protocol -----	72



NWS WALLCAST™ CONCERT PRE-CONCERT SURVEY

Welcome Page

Thank you for participating in this short survey. At the end of the survey, you'll be asked if you'd like to provide additional feedback on the WALLCAST program.

Your answers are completely confidential. Your response is very important to us!

Let's get started...

Section 1: Relationship with NWS and classical music

1. **Is this your first time to a New World Symphony WALLCAST™ concert?**
No
Yes

2. **Have you ever attended The SoundScape Cinema Series at New World Center (free movies on Wednesday and Thursday nights)?**
No
Yes

3. **During the last twelve months, NOT including NWS WALLCAST™ concerts, how many classical music concerts did you attend (including New World Symphony and other orchestras)?**
None
1 or 2
3 to 5
6 to 10
11 or More

4. **How much of your personal music collection or listening is classical music?**
None
1-10%
~25%
At least 50%
Almost all (80% or more)

Suggest alternative answer cohorts using a drop down list (ideally, this should be a continuous numerical distribution, not categorical):

0%
10%
20%
30%
40%
50%



60%
70%
80%
90%
100%

Section 2: Social Construct and Motivations

5. How many people are in your group at tonight's NWS WALLCAST™ concert?

[Drop down list of options from 1 to "12 or more"]

6. **Who did you come with tonight? (select all that apply)**

I came alone

Spouse/partner

Parents

Children

Grandchildren

Other children

Friends

A date

Co-workers or classmates

Out of town visitor

Organized group (e.g., Meetup group, church group)

7. **Select the three most important reasons why you attended the performance. (select up to three)**

Because it's free

Because someone invited you

To spend quality time with family members

To spend quality time with friends

To be emotionally moved or inspired

To expose others to classical music

To discover something new

To hear the specific pieces on the program

To see the work of a specific composer/conductor/musician

To enjoy the SoundScape park and being outside, in general

To experience music in a relaxed, social environment

To 'people watch' and enjoy the community ritual

To relax, escape or have fun



Section 3: Demographics

Please note that all answers are confidential, and will not be used for sales or marketing purposes or shared with other organizations.

8. What is your gender?

Female
Male

9. In what year were you born?

[open-end text box]

10. What is your home Zip Code (i.e., primary residence)?

[open-end text box]

11. Are you or is anyone with you tonight visiting from outside South Florida?

No
Yes

12. Your relationship status?

Married or partnered
Single/never married
Previously married or widowed

13. What is your race/ethnicity? (select all that apply)

White
Black or African American
Hispanic or Latino Asian
American Indian or Alaska Native
Asian
Native Hawaiian or Pacific Islander
Other: _____

14. What is your annual household income? (Combine all earners in your household.)

Less than \$25,000
\$25,000-\$49,999
\$50,000-\$74,999
\$75,000-\$99,999
100,000-\$149,999
\$150,000 and Above

Section 4: Request for Email

Thank you! The New World Symphony is also interested in your experience of tonight's WALLCAST concert.



15. **Would you be willing to take a short follow-up survey sometime within the next week, if we send you a link to an online survey?**

No *[skip to thank you page]*

Yes

16. **Thank you! Please provide your email address in the space below so that we may send a link to the follow-up survey. Your email address not be used for any other purpose.**

[Open-end text box]

Thank You Page

Thanks so much, and enjoy the concert!

NWS WALLCAST™ POST-CONCERT SURVEY

Welcome Page

Thank you for participating in this follow-up survey about your recent WALLCAST™ experience.

Your answers are completely confidential. Your answers will help the New World Symphony understand the impact of its WALLCAST concerts.

Let's get started...

Section 1: Screener and Match Questions

1. **To confirm that you are an eligible respondent, please enter your email address in the space provided below. (Note: this should be the same email address to which you received the invitation to complete this survey).**

[Open-end text box]

2. **Which WALLCAST™ performance did you recently attend?**

[Drop down list of all surveyed performance dates]

3. **Did you take a survey at the concert before the concert started?**

No

Yes

Section 2: Relationship with NWS and classical music

4. **Have you ever purchased a ticket to a New World Symphony concert?**

No *[skip next question]*

Yes



5. What is your current subscription status with the New World Symphony? (select one)

- I am a current subscriber (bought any 2014–15 package)
- I subscribed in previous season(s), but not this season
- I've never subscribed, but attend on a case-by-case basis

6. Overall, how would you characterize your own level of knowledge about classical music?

- 1=Low
- 2
- 3
- 4
- 5=High

Section 3: Transportation and Activities

7. How did you travel to the WALLCAST™ concert?

- By car
- Public transit
- Taxi
- By bicycle
- Walked

8. What did you do immediately prior to arriving at the SoundScape park for the WALLCAST™ concert? (select all that apply)

- Ate or went for drinks at a bar or restaurant along Lincoln Road Mall
- Ate or went for drinks at a bar or restaurant elsewhere in Miami Beach
- Walked along Lincoln Road Mall, but didn't eat or shop
- Shopped at Lincoln Road Mall
- Shopped elsewhere in Miami Beach
- Did other sightseeing activities

9. What did you do while at the concert? (select all that apply)

- Brought your own food and drink for a picnic
- Socialized with friends you came with
- Sat quietly and watched/listened to the concert
- Took photos or videos of the event with your cell phone
- Socialized with friends you saw at the event, but didn't know were coming
- Posted a photo or video of the event to Facebook or other social media
- Sent a text or email message to someone about the event
- Accessed and reviewed the mobile concert program on your smartphone (via text)
- Followed and/or posted to the New World Symphony's Facebook page or Twitter feed

10. What did you do after the concert ended?

- Went directly home



Stayed at a Miami Beach hotel
Ate or went for drinks at a bar or restaurant along Lincoln Road Mall
Ate or went for drinks at a bar or restaurant elsewhere in Miami Beach
Walked along Lincoln Road Mall, but didn't eat or shop
Shopped at Lincoln Road Mall
Shopped elsewhere in Miami Beach
Did other sightseeing activities

- 11. In total, approximately how much did you spend on going out to eat, shopping or other activities you did either before or after the concert?**
[Open-end essay box]

Section 4: Satisfaction and Impact

- 12. During the performance, did you lose track of time and forget everything else?**
1= Not At All
2
3
4
5=A Great Deal
- 13. How would you characterize your emotional response to the performance?**
1= Weak
2
3
4
5=Strong
- 14. What words best describe how the concert made you feel? Please answer using single words, one per line, up to six words.**
[Open-end essay box]
- 15. Afterwards, did you discuss the meaning or merits of the performance with others who attended?**
No
Yes – casual exchange
Yes – intense exchange
- 16. How much did the concert deepen your appreciation for the music performed?**
1= Not At All
2
3
4
5=A Great Deal



17. How much did being outdoors enhance or detract from the experience of the music?

- 1=Detract
- 2
- 3
- 4
- 5=Enhance

18. As a result of attending this concert, do you feel better equipped to appreciate classical music in the future?

- 1= Not At All
- 2
- 3
- 4
- 5=A Great Deal

19. To what extent did you experience each of the following as a result of attending the WALLCAST™ concert?

- 1=Not At All
- 2
- 3
- 4
- 5=A Great Deal

Provided a fulfilling social experience for me and my friends and/or family
Increased my appreciation of classical music
Connected me to a larger community outside of my family and friend networks
Made me proud to live in or near Miami Beach
Gave me a deeper appreciation and understanding of what New World Symphony does
Allowed me a few moments to relax and get away from the grind of daily life

20. Rate your satisfaction with each of the following aspects of the concert.

- 1=Unsatisfied
- 2
- 3
- 4
- 5=Satisfied

Quality of orchestra's performance
Selection of pieces on the program
Quality of sound in the park
Accessibility (e.g., ability to navigate around the park)
Length of concert
Overall ambiance of the event
Behavior/deportment of others in the park
Overall investment of time and money



- 21. How likely are you to recommend the WALLCAST™ to friends and/family who haven't attended a WALLCAST™ before?**
1= Not At All Likely
2
3=Somewhat Likely
4
5=Very Likely
- 22. How much did the experience of this concert influence your feelings about attending indoor, ticketed New World Symphony concerts in the future?**
1= Negative Influence
2
3=No Change
4
5=Positive Influence
- 23. WALLCAST™ concerts are free and open to the public. Philosophically, who do you think should be financially responsible for these concerts? (rank the following options from 1 to 6, with 1=most responsible, and 6=least responsible)**
- The City of Miami Beach, with tax dollars
The New World Symphony
The people who come to WALLCAST™ concerts, through voluntary donations
Businesses in Miami Beach, who benefit from the activity
National corporate sponsors, in exchange for the exposure
Philanthropic foundations and wealthy individuals
- 24. Please share any comments you have specifically about the WALLCAST™, either positive or negative.**
[Open-end essay box]

Thanks so much for your feedback! We look forward to seeing you at a future New World Symphony concert.



WALLCAST™ Intercept Interview Script

Introduction Script

[BEGIN ONCE INTERVIEWEE IS SEATED]

Thanks so much for agreeing to speak with me today. My name is _____, and I am a volunteer [consultant] with the New World Symphony [NOTE TO STAFF: DO NOT TELL INTERVIEWEE YOUR ROLE WITHIN THE ORGANIZATION]. I'd like to ask you a few questions about tonight's WALLCAST event and the New World Symphony. This should only take about 10 minutes, and all your answers are strictly confidential.

In appreciation for speaking with me tonight, you will receive a \$10 voucher, good for any upcoming concert with the New World Symphony in the 2014-2015 season.

Do you have questions before we begin?

Section 1: Background and Cultural Activities

First, I have a few basic introductory questions.

- 1. What is your name? Please spell it out for me so that I may record it accurately.**
- 2. What year were you born?**
- 3. Where are you from originally, and how long have you been in Miami?**

Probe: [IF U.S. RESIDENT] **What is your home ZIP Code?**

Probe: [IF OUT-OF-TOWN VISITOR] **What was your purpose for visiting Miami?**

Section 2: Relationship with and Perceptions of NWS

Next, I'd like to know more about your experience with New World Symphony.

- 4. Have you ever attended a WALLCAST concert before tonight?**
- 5. Have you ever attended other events at SoundScape Park (e.g., film series)?**



6. **Have you ever attended another New World Symphony program (e.g., ticketed concert, other community event/subscriber/donor event)?**

Probe: [IF “YES”] **What was the last event/concert you remember going to?**

Probe: [IF “YES”] **What did you like or dislike about your experience?**

Probe: [IF “NO”] **What has kept you from attending other programs (aside from WALLCAST concerts)?**

Section 3: Exploring the social aspects of the WALLCAST experience

Great. Now, let’s talk about the social aspect of the WALLCAST experience.

7. **Did you or someone else make the decision to attend tonight?**
8. **Who did you come with tonight?** [USE PRE-CODED LIST TO MATCH ONLINE SURVEY]

Probe:[IF “INITATOR” (INVITED OTHERS)] **Why did you invite these people to come with you?**

Probe: [IF “RESPONDER” (WAS INVITED)] **Why did you accept the invitation to come tonight?**

9. **Is the social experience of attending a WALLCAST the same or different from the social experience of attending a ticketed concert? How is it different?**
10. **How would you characterize the crowd that is here tonight? Do you think it’s similar to, or different from, the crowd that goes to ticketed concerts inside the hall? How so?**

Section 4: Motivations for attending

Now, let’s talk about why you came tonight.

11. **What are your main reasons for attending this concert?**

Probe: **How important is the quality of the music performance to your enjoyment of the evening?**

Section 5: Wrap-Up and Email Collection

Thanks! We’re almost done. Just a few more questions.

12. **What would be lost if the WALLCASTs were cancelled completely?**



13. Finally, we are asking everyone if they would provide more feedback on their experience of tonight's concert by taking an online survey within the next few days. Would you be willing to take this survey?

[IF "YES"] Great. What is your email address? Please speak slowly and clearly so I can make sure to get it right.

Again, thank you for your time. Make sure to hand your card back into the volunteer at the door to receive your \$10 Visa ticket voucher. Enjoy the concert!



New World Symphony - WALLCAST™ Participant Focus Groups

Moderator's Topic Guide

January 25th 2015

<u>Location</u>	<u>Date and Time</u>	<u>Moderator</u>
New World Center	January 25, 2:00 - 3:30 pm	Alan Brown
New World Center	January 25, 4:00 - 5:30 pm	Rebecca Ratzkin

Supplies Needed

Nameplates, Sharpies for name plates, pens for respondents
Handouts: Motivations handout

Research Goals

The overall purpose of these focus groups is to gain deeper understanding of the motivations, social construction and impact of WALLCAST™ concerts among participants.

Discussion Topics & Time Allocations (90 minutes)

5 min.	Moderators' Introduction & Explanation of the Focus Group
10 min.	Participant Introductions
30 min.	WALLCAST™ Experience - Exploration of Social Context
20 min.	Exploring the Case of WALLCAST™
10 min.	Overall Value

Moderator's Introduction - 5 minutes

- Moderator introduction
- This is an informal focus group; introduce observers sitting in the room
- Length of discussion - about 90 minutes, no break
- Purpose - Our discussion today is part of a larger study about the New World Symphony's WALLCAST™ concerts. The purpose of the research is to better understand the motivations and experience around attending a WALLCAST™ concert and the value it provides to you and residents and visitors of greater Miami.
- Your feedback will provide important input to New World Symphony, as it continues to develop the WALLCAST™ programming.

Explanation of the Focus Group

- Please speak up so that everyone can hear.



- The confidentiality of your remarks is assured - your names will not be attributed to any of the comments in the report, so please be as candid as possible.
- If you'd like to add something to the conversation, please raise your hand and I'll call on you as quickly as possible.
- I may call on people from time to time, even if they don't have their hand up, in order to make sure that everyone gets a chance to speak.
- As we get into the discussion, please feel free to disagree with something and say "I have a different opinion about that..." because it's very important that we hear differing opinions, when you have them. OK?
- Do you have any questions before we start?

Participant Introductions (working clockwise around the table) - 10 minutes

Let's go around the table quickly and I'd like you to introduce yourself and tell us...

- Your name
- How long you've lived in the Miami Beach area
- Your classical music experience, in general terms

Section 1: WALLCAST™ Experience - Exploration of Social Context - 30 minutes

Before we get into your reactions to the concert, I'd like learn about the "story of your evening" - what you did before you arrived, what time you arrived, what you did while you were here, who was with you, what you did afterwards, etc.... My goal is to understand more about the full experience.

1. **What activities did you do, if any, leading up to, and in conjunction with your visit to the WALLCAST™ concert?**
Probe: Did you do anything beforehand, like shopping or dining on Lincoln Road Mall?
Probe: Did you do anything to learn about the artistic program in advance of attending?
Probe: What time did you arrive at the park? What did you do while you were waiting for the concert to start? What, if anything, would have improved your experience between the time you arrived, and the time the concert started?
2. **How would you describe the crowd last night? Don't think just about your own party, but how would you describe the people you saw around the park?**



- Probe:** How was the crowd last night different from the crowd you might expect attends a NWS concert inside the hall? (or other classical music concerts held inside a hall)?
3. **New World Symphony wants to diversify its audience through the WALLCAST™ concerts. How well do you think they are accomplishing this goal? Do you think they could do better?**
 4. **Who did you interact with last night? In other words, what was your social experience like, apart from the music?**
Probe: Did you interact with people outside of your party?
Probe: In what ways was the WALLCAST™ socially fulfilling for you?
 5. **What did you do after the concert?**
Probe: Did you go out afterwards or go home?
Probe: Did you talk about the concert with the people who came with you? What did you talk about?
Probe: Did you research any the works performed on last night's program?
 6. **What, if anything, could NWS do to improve the WALLCAST™ experience?**

Section 2: Exploring the Case for WALLCAST™- 15 minutes

7. **In sum, what benefit did you gain from attending last night's WALLCAST concert? What did you walk away with that you didn't have beforehand?**
8. **How important is it that the WALLCAST™ concert is simulcast of a live performance happening inside the hall?**
Probe: Would the experience be the same or different if it were a screening of a program from earlier in the week (e.g., last Friday's program)?
Probe: Would you feel the same or different about WALLCASTs if they featured concerts by other orchestras from around the world?
9. **For some people WALLCAST™ concerts are a gateway into classical music and for others WALLCASTs are just one of many things in their diet of classical music. How role do WALLCAST™ concerts play in your experience of classical music?**
Probe: Are you more or less likely to attend a ticketed concert after last night's program?
10. **New World Symphony is committed to keeping WALLCAST™ concerts as a free public event, and is looking for resources in order to insure that it remains free in perpetuity. Who do you think should help fund WALLCAST™ concerts?**
Probe: If one WALLCAST a year were framed as a fundraiser. It would still be free, but there was a crowdfunding component online (e.g., QR code which took you to an Indiegogo page), how would you feel about this?

Thanks so much for your helpful input. [Distribute incentives]



NWS Donor Motivations Survey

EMAIL INVITATION

Dear [Patron Name],

Would you be willing to donate a few minutes of your time to help the New World Symphony?

We are currently in the middle of an important study to better understand the philanthropic case for support of NWS's free outdoor WALLCAST™ concert series. As part of this study, we are conducting a brief survey of our donors about their motivations for giving, in general, and their feelings about the WALLCAST™ specifically.

Please click here [\[hyperlink\]](#) to take the survey. If the hyperlink does not work, please copy and paste the following URL into your browser window: [\[hyperlink\]](#)

Your input will help us to develop and support WALLCAST™ programming in the future.

I thank you for your very valuable assistance.

Sincerely,

Howard Herring, CEO, New World Symphony

WELCOME PAGE

Thanks for participating in the New World Symphony's study of the philanthropic case for WALLCAST™ concerts.

The survey takes approximately 10 minutes to complete, and your answers are both confidential and anonymous.

Let's get started...

SECTION 1: RELATIONSHIP WITH NWS AND WALLCAST™ EXPERIENCE

First, we'd like to know about your relationship with NWS and experience attending WALLCAST™ concerts.

1. At any time in the past 10 years, have you made a gift of **\$XXX** or more to the New World Symphony above and beyond the cost of tickets?



No [*thank and terminate*]

Yes [*continue with survey*]

2. **What is your current subscription status with the New World Symphony?** (select one)
 - I am a current subscriber (bought any 2014–15 package)
 - I subscribed in previous season(s), but not this season
 - I've never subscribed, but attend on a case-by-case basis

3. **For how many years have you been attending New World Symphony (NWS) concerts?** (select one)
 - 1 or 2 years
 - 3 to 5 years
 - 11 to 20 years
 - More than 20 years

4. **During the last twelve months, how many classical music concerts did you attend (including New World Symphony and other orchestras), NOT including WALLCAST™ concerts?** (select one)
 - None
 - 1 or 2
 - 3 to 5
 - 6 to 10
 - 11 or More

5. **How many WALLCAST™ concerts did you attend this past season (2014/15 season), if any?** (select one)
 - None – never attended a WALLCAST™ concert before
 - None this season, but attended in the past
 - 1 to 2
 - 3 to 5
 - 6 to 10
 - More than 10

6. [IF ANSWERED NONE TO ABOVE QUESTION] **What has kept you from attending a WALLCAST™ concert?** (select all that apply)
 - No one to go with
 - Busy schedule
 - Distance – too far to travel
 - Difficulty with parking
 - Weather - threat of rain
 - Not interested in programming
 - Worried about the crowd and noise diminishing the concert experience
 - Prefer attending concerts inside
 - Didn't know about it enough far enough in advance
 - Other (*please specify*):



SECTION 2: EXTENT OF GIVING (GENERAL)

Next, please tell us a little about your general giving practices. Please be assured your responses are anonymous.

7. How important to you are each of the following? (select one for each)

1=Not at all Important

7=Very Important

Social justice and equal opportunity

Being on the leading edge of art and ideas

Valuing a diversity of viewpoints

Learning about other cultures around the world

Re-paying society for the opportunities and good fortune you've had

Working to alleviate other people's suffering

Being involved in civic affairs and working on behalf of your community

Making new friends and expanding your social network

Strengthening family relationships

8. **What causes, in general, do you support?** (select all that apply)

Performing arts organizations

Museums and fine arts groups

Women's causes

Social justice/equality causes

Environmental or conservation causes

Health causes or medical research

Political campaigns

Education

Human services (e.g., youth programs)

International aid or disaster relief

Religious causes or faith-based institutions

9. **Approximately how much money did you (and your spouse or partner, if applicable) donate to all nonprofit causes, excluding NWS, in the past calendar year (2015)?** (select one)

\$0-\$1,000

\$1,001-\$5,000

\$6,000-\$10,000

Over \$10,000

10. **Approximately what percentage of your total giving goes towards performing arts programs and activities (not including the cost of tickets or subscriptions)?** (select one)

10%

20%

30%

40%

50%



60%
70%
80%
90%
100%

11. **In general, how often do you participate in crowdfunding campaigns hosted on platforms like Kickstarter or Indiegogo?** (select one)

None – never done it before
Less than once a year (i.e., every so often)
1 to 2 times a year
3 to 5 times a year
6 or more times a year

12. [IF NEVER PARTICIPATED IN A CROWDFUNDING CAMPAIGN]
What, if anything, has deterred you from participating in a crowdfunding campaign so far?

[open end]

SECTION 3: MOTIVATIONS AND INTEREST IN GIVING TO NWS

13. **In your lifetime, approximately how much have you given to NWS (above and beyond the cost of tickets and subscriptions)?** (select one)

Less than \$10,000
\$10,000 to \$24,999
\$25,000 to \$49,999
\$50,000 to \$99,999
\$100,000 or more

14. **In the past, have you made a designated gift for any of the following NWS programs?** (select all that apply)

Scholarships for NWS Fellows
Support touring
WALLCAST™ concerts
Building Fund for the New World Center
Other (*please specify*)

15. **How important to you are each of the following in their influence on whether or not to make a financial contribution to NWS?** (select one for each)

1=Not at all Influential
7=Very Influential

Quality of musicianship of the Fellows
Being a national laboratory for developing innovative concert programs
Quality of customer service that you receive
International reputation and recognition



Commitment to engaging the community through free public programs (e.g., WALLCASTS™)
Educational mission to train tomorrow's orchestra musicians
Your level of confidence in the orchestra's board and staff leadership
MIT's artistic leadership

16. **Rate your level of interest in supporting each of the following NWS programs or causes.** (select one for each)
Scale: 1=Low Interest; 7=High Interest

Guest appearances by prominent musicians and gifted conductors
Scholarships for NWS Fellows
In-school programs that provide Miami area youth with high quality music training
WALLCAST™ concerts to expand public access to NWS and classical music
Technologies that allow NWS to engage with audiences and young musicians around the world
National or international tours ours that give Fellows that experience, in addition to highlighting and promoting the NWS brand
Supporting NWS's endowment, to ensure sustainability of the organization in perpetuity

17. [IF ALREADY SUPPORT OR ARE INTERESTED IN SUPPORTING WALLCAST™] **Based on your answers to the previous questions, you've stated an interest in, or past support of, WALLCAST™ concerts. Is there any particular reason why you feel strongly about supporting WALLCAST™ concerts?**
[open end]

18. **WALLCAST™ concerts are free and open to the public. Philosophically, who do you think should be financially responsible for these concerts?** (rank the following options from 1 to 6, with 1=most responsible, and 6=least responsible)

The City of Miami Beach, with tax dollars
The New World Symphony
The people who come to WALLCAST™ concerts, through voluntary donations
Businesses in Miami Beach, who benefit from the activity
National corporate sponsors, in exchange for the exposure
Philanthropic foundations and wealthy individuals

SECTION 4: CONCEPT TESTING OF FUNDRAISING STRATEGIES FOR WALLCAST™

New World Symphony is considering different ways of raising funds to support WALLCAST™ concerts. Please give us your reactions to the ideas that follow.



19. Suppose WALLCAST™ concert audiences were asked to voluntarily give small amounts to support WALLCAST™ concerts through a special SMS/texting number, or through donation boxes set up throughout Miami Beach SoundScape. How likely would you be to participate in this type of campaign?
1=Not at all likely
7=Very likely
20. Please provide any further thoughts you have about this idea in the space below.
[open-end]
21. Suppose NWS designated one WALLCAST™ concert each year as a benefit event to raise funds to support free outdoor programs throughout the season. At the event, a master of ceremonies would take pledges, much like fundraising drive on a public radio station. How likely would you be to attend this event, or participate in the fundraising drive?
1=Not at all likely
7=Very likely
22. Please provide any further thoughts you have about this idea in the space below.
[open-end]
23. Suppose NWS produced an annual online crowdfunding campaign to generate support for free outdoor programs throughout the season, using a website like KickStarter or Indiegogo.com. How likely would you be to participate in this kind of campaign?
1=Not at all likely
7=Very likely
24. Please provide any further thoughts you have about this idea in the space below.
[open-end]

SECTION 6: DEMOGRAPHICS AND OTHER DESCRIPTIVE VARIABLES

Please note that all answers are confidential, and will not be used for sales or marketing purposes or shared with other organizations.

What is your gender?

Female

Male

In what year were you born?

[open end text box]



Your relationship status?

- Married or partnered
- Single/never married
- Previously married or widowed

What is your race/ethnicity? (select all that apply)

- White
- Black or African American
- Hispanic or Latino
- Asian
- American Indian or Alaska Native
- Native Hawaiian or Pacific Islander
- Other (please specify)

How long have you lived in the greater Miami area? (select one)

- I am not a permanent resident of Miami
- Less than 1 year
- 1 to 2 years
- 3 to 5 years
- 6 to 10 years
- More than 10 years, but not my whole life
- All of my life

What is your home Zip Code (i.e., primary residence)?

[open end text box]



NWS WALLCAST™ Concert Stakeholder Interviews - Interview Protocol

Introduction and Set-Up

Thanks so much for your time today. We should be able to finish in 45 minutes. If we need a few more minutes beyond that, are available? [negotiate a hard stop time]

Our discussion today is part of a larger study about the New World Symphony's WALLCAST™ concerts. We are speaking to a number of community leaders like yourself to understand how WALLCAST™ concerts create value for you, your stakeholders and Miami residents, in general.

Today, we're speaking with you as a representative of **[name of stakeholder group]**. Other stakeholder groups that we'll be interviewing include:

- City of Miami Beach
- Miami-Dade County representatives
- Local hotels and their guests
- Lincoln Road businesses, and their patrons
- Current supporters of the WALLCAST™ concerts, and other philanthropists and funders

New World Symphony commissioned this study, with generous support from The Miami Foundation, to gain a clearer sense of who the WALLCAST™ concerts serve, and to build a stronger case for support for these free outdoor programs.

Regarding confidentiality, we would like to speak with you on a non-confidential basis. In other words, we'd like to attribute your comments in our report to the New World Symphony. Is this acceptable to you?

It would be helpful if we could record our conversation. Is this acceptable to you?

If you would like to say something off the record, please don't hesitate to ask me to turn off the recorder. It's very important that you feel free to speak candidly and to offer critical remarks.

Module 1: Attitudes and Experience of WALLCAST™ Concerts

[The first question is designed to "break the ice" and personalize the subject matter.]

1. What's your past experience with WALLCAST™ concerts? Have you attended any lately?



[PROBE IF ATTENDED BEFORE]

Probe: What was your experience of the event?

Probe: Can you describe the audience for WALLCAST™ concerts, based on what you've seen?

Probe: How is the experience of attending a WALLCAST™ concert different from the experience of attending a NWS concert inside the hall? (or other classical music concerts held inside a hall)?

[PROBE IF HAVEN'T ATTENDED]

Probe: Have you heard anything about WALLCAST™ concerts from others who've attended?

Probe: Is there any particular reason why haven't you attended a WALLCAST™ concert?

2. Have you ever attended the SoundScape Cinema Series at New World Center, presented and curated by the City of Miami Beach (free movies on Wednesday and Thursday nights)?
3. Can you think of an equivalent event in South Florida – an event that accomplishes something similar to a WALLCAST concert?
4. There are many, many festivals and free outdoor events available to the residents and visitors. What makes WALLCAST™ concerts different from other free public events?

Probe: Why does Miami Beach [Miami-Dade County] need an event like the WALLCAST™ concert?

5. **[SPECIFIC TO HOTELS AND VISITORS BUREAU]** Generally speaking, how do WALLCAST™ concerts fit into the larger constellation of amenities that you like to promote to your clients and/or visitors to Miami?

Probe: Can you name another local or countywide event that is like the WALLCAST™ concert?



Module 2: Community Development [FOR CITY AND COUNTY STAKEHOLDERS]

Now I'd like to ask you to speak as a representative of **civic leadership and community development interests, broadly defined.**

6. What are some of the most pressing civic issues that you deal with on a daily basis? What are your priorities for improving the quality of life in Miami Beach? What's holding back Miami Beach from reaching its next level as a community?
7. What, if any, community development projects are you working on right now?

Probe: **[IF YES]** What problems do they aim to solve? What are the desired outcomes?
8. Currently, what role do WALLCAST's play in the larger community development agenda? Or, what role might WALLCAST's play?
9. In the future, how could NWS better align its WALLCAST™ concerts with the larger community development agenda?

Probe: Do you have any ideas for how programming at SoundScape might evolve further? [as time allows, test awareness of: yoga mornings, yoga night, cycling night, classical SoFL lunchtime broadcast, Art Basel film series]

Module 3: Case Statement and Funding Support

Now I'd like to focus in on community support for WALLCAST™ concerts.

10. Who do you think benefits from the WALLCAST™ concerts?

Probe: Can you think of any indirect or spillover benefits to others who do not attend?
11. Let's say you were advising NWS on fundraising for WALLCAST™ concerts, what arguments for support would you find most persuasive?

Probe: What value do WALLCAST™ concerts offer that other free cultural events do not? [unique value proposition]

Probe: What, if anything, limits NWS's ability to attract more financial resources for WALLCAST™ concerts?



12. **[FOR CURRENT WALLCAST FUNDERS]** Why do you support WALLCAST concerts?
13. Who [else] should be supporting WALLCAST's?
14. If WALLCAST™ concerts were to go away, what would be lost?

Thanks so much for your time today. Its been very helpful. We will make sure to send you a copy of the final report, most likely in June or July.

