



The WALLCAST™ Concert Experience

A Study commissioned by the
New World Symphony

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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 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.

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 and funding from the City of Miami Beach 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, with or without a corporate partner, NWS will have to reach outside its current philanthropic model and base of donors in order to develop a reliable stream of private funding for WALLCAST™ concerts.

Data suggest four philanthropic arguments that NWS can leverage as it considers next steps.

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 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,” 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.
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.

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 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 a small SMS campaign (with instructions for giving projected onto the screen at intermission, for example) and/or place 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.

- 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:

- **Testing complementary digital programming**, such as other concert or fine arts webcasts (both live and pre-recorded) under a different, but related brand.
- **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.
- **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.
- **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.



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.

With the support of key donors and public officials, NWS constructed an outdoor venue in 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 is exploring the possibility of digital projection within the Frankel Wing of the Art Gallery on campus.
- Oklahoma State University is creating a new Performing Arts Center with plans to include outdoor simulcasting of performances

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. Through a generous donation 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™ concerts. 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

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™ member 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 the party attending.

- 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:

- Deborah Margol, Deputy Director, Miami-Dade County Department of Cultural Affairs
- Stuart Kennedy, Senior Programs Officer, Miami Foundation
- Jimmy Morales, Miami Beach City Manager
- Michael Grieco, Miami Beach Commissioner
- Edward Shumsky, NWS Trustee and WALLCAST™ supporter
- Bruce Clinton, NWS Trustee and WALLCAST™ supporter
- Alan Faena & Ximena Caminos, developers
- Bruce Turkel, CEO of Turkel Brands and advisor to Greater Miami Convention & Visitors Bureau

Audience Demographics and Motivations

Track 1 focused on the “who, why, how and what” of WALLCAST™ concerts. Results here are based on 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 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 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

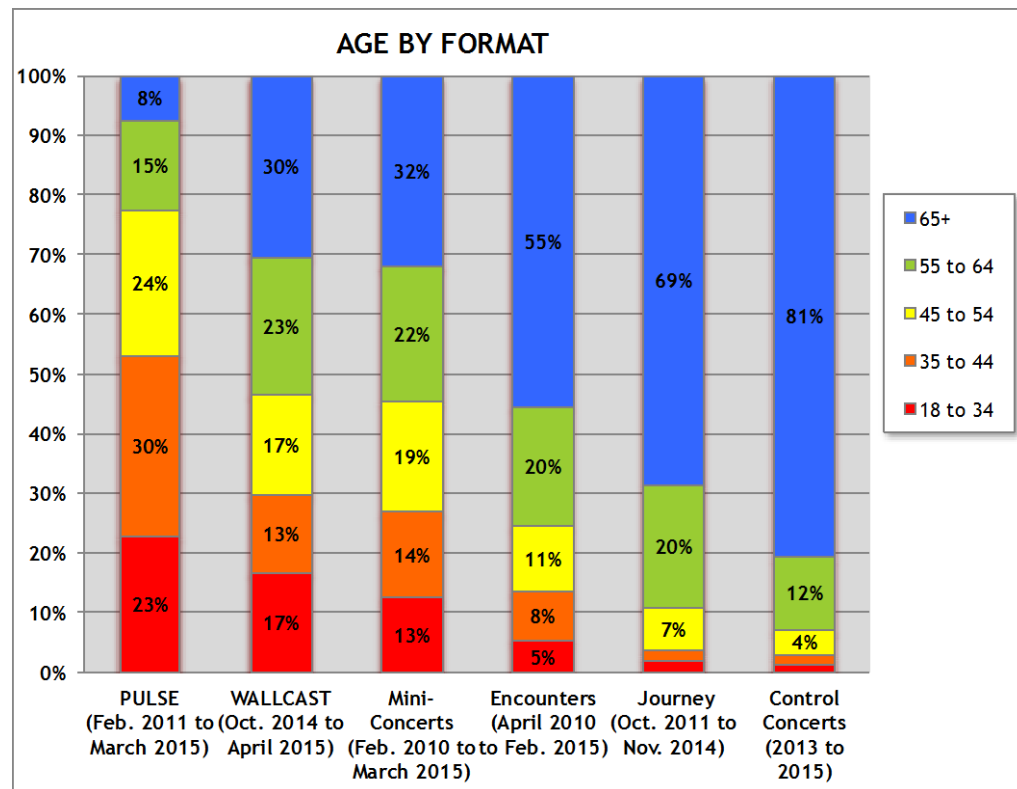
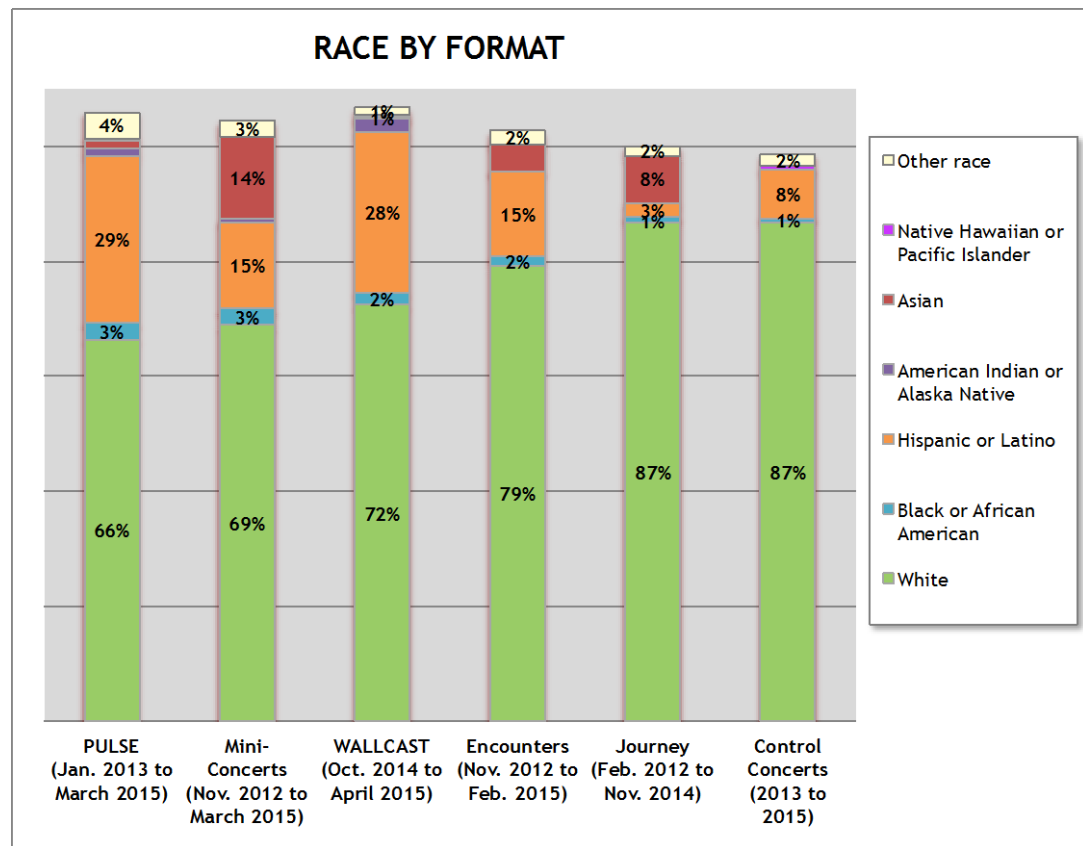


Figure 2: Comparison of Race/Ethnicity Across All NWS Concert Formats



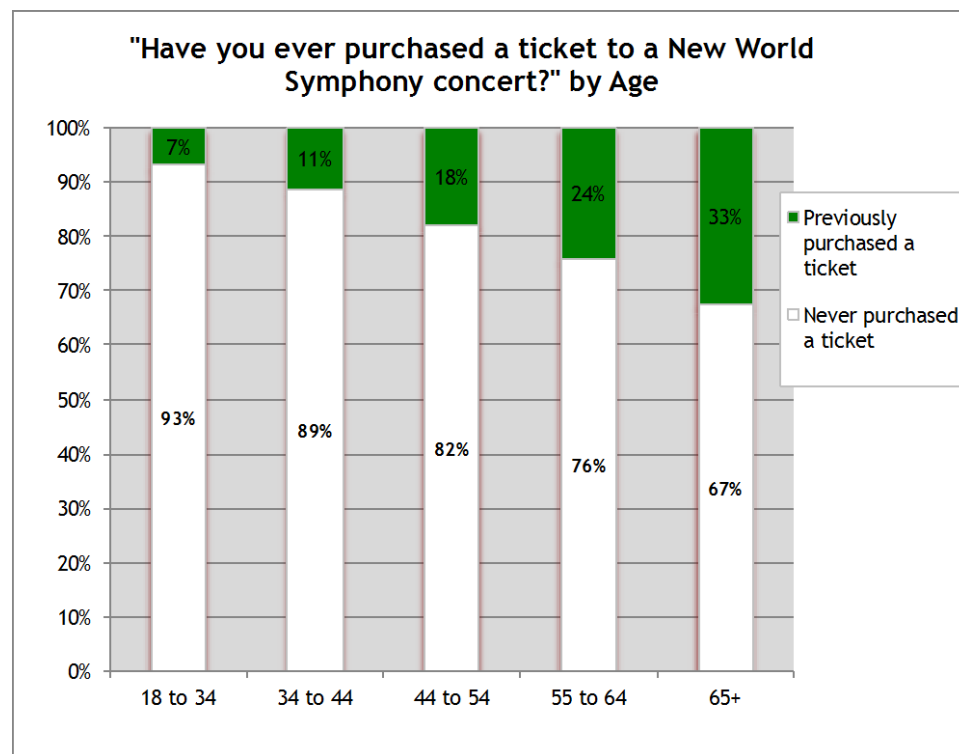
Interview respondents and focus group participants were asked to describe the WALLCAST™ crowd in qualitative terms, to better understand perceptions of the audience and to see how well perceptions line up with actual data. For the most part, perceptions aligned with reality. One focus group participant 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 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

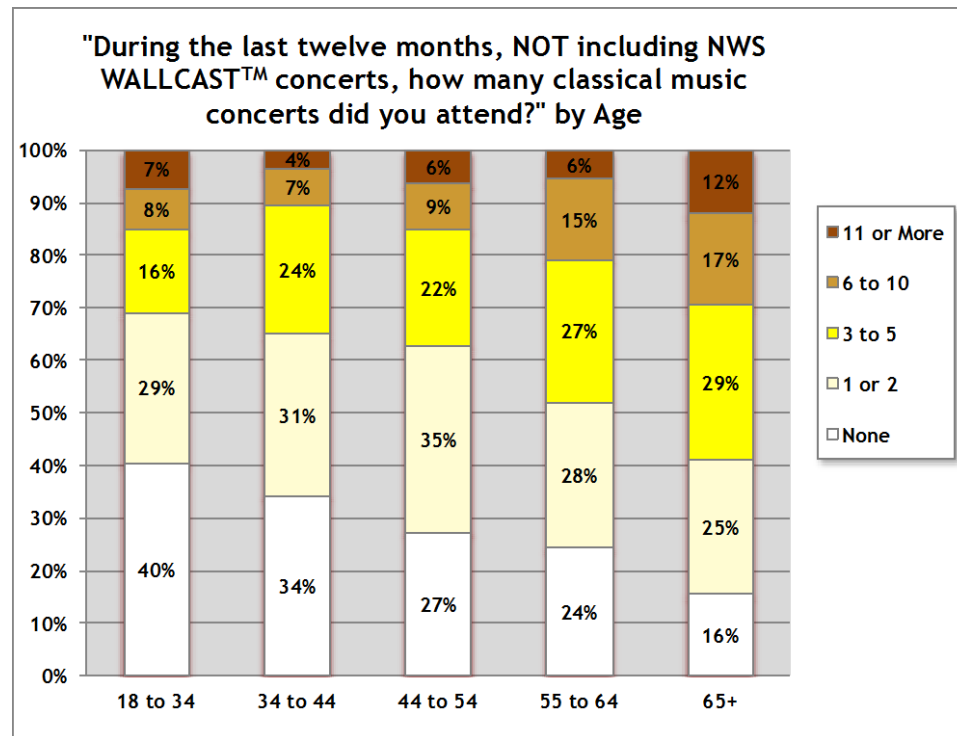
One of the goals of WALLCAST™, similar to several other experimental formats used by NWS, is to introduce people to the classical music concert experience, and to NWS and its mission. As noted earlier, survey results suggest that three in ten audience members are attending WALLCAST™ for the first time, 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.

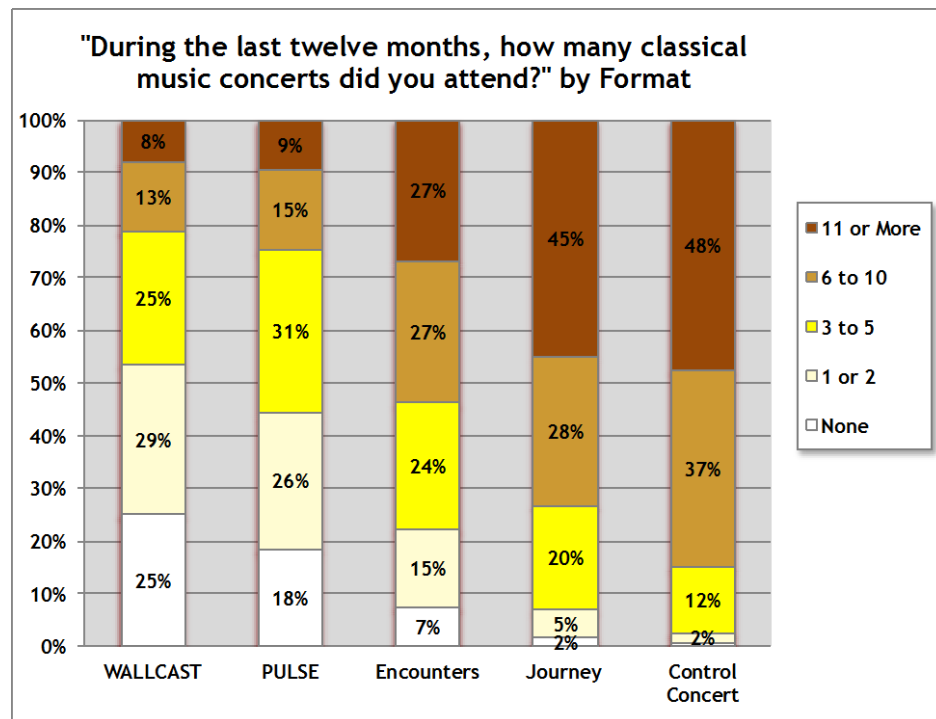
Figure 4: Frequency of Classical Music Concert Attendance by Age



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. This suggests opportunities to formulate in newcomers an understanding of classical music based on their WALLCAST concert experience, and paths 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.

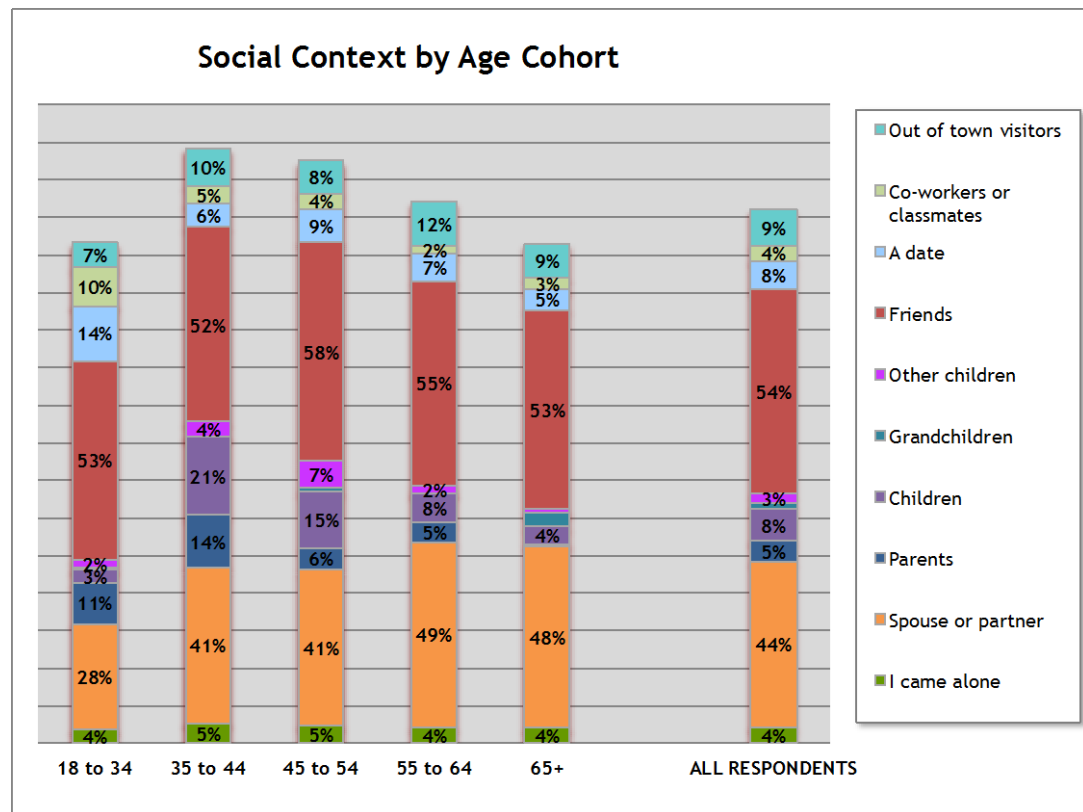
The combination of the park setting and high quality WALLCAST™ programming creates a space where participants feel comfortable approaching and talking to strangers. Generally, this kind of interaction does not occur at indoor concerts, where most patrons focus their attention on others within their party 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 (no grandchildren). 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

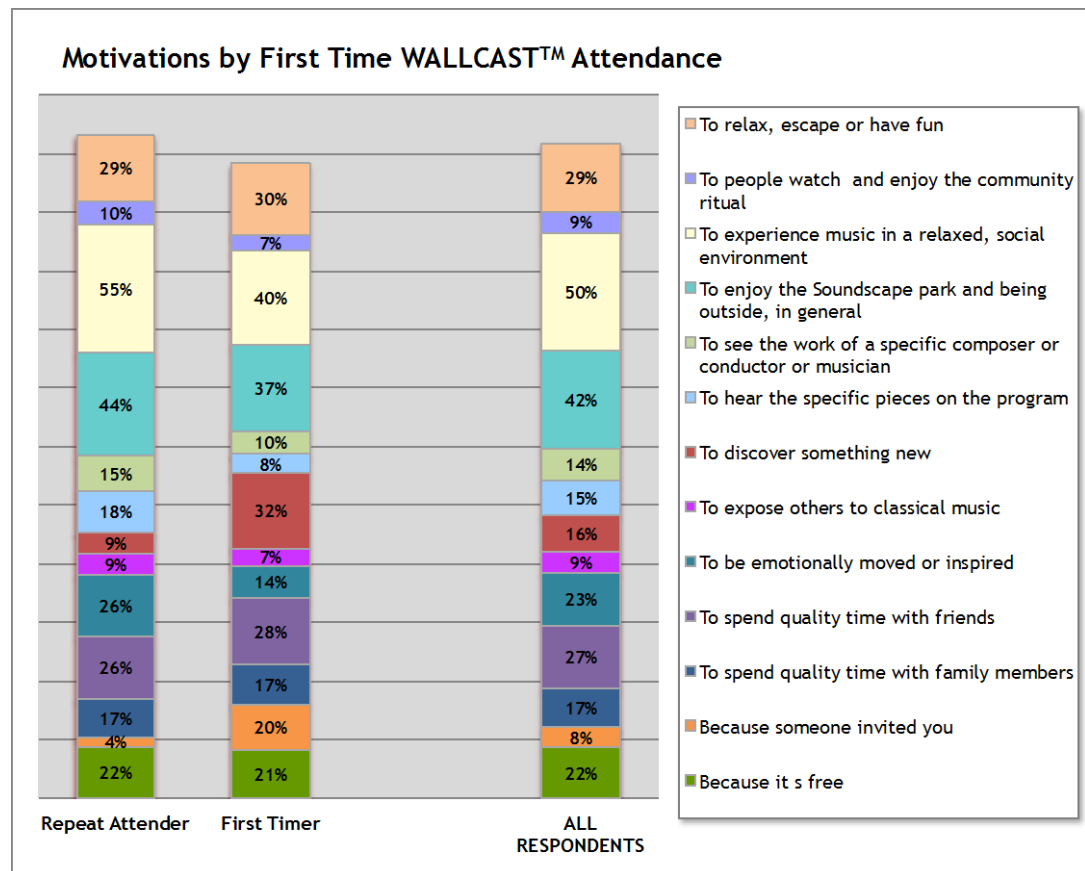


When asked why they attended tonight's WALLCAST™ concert, a majority of respondents cited at least one social motivation out of 13 possible options (multiple responses allowed; see Figure 7 below):

- 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

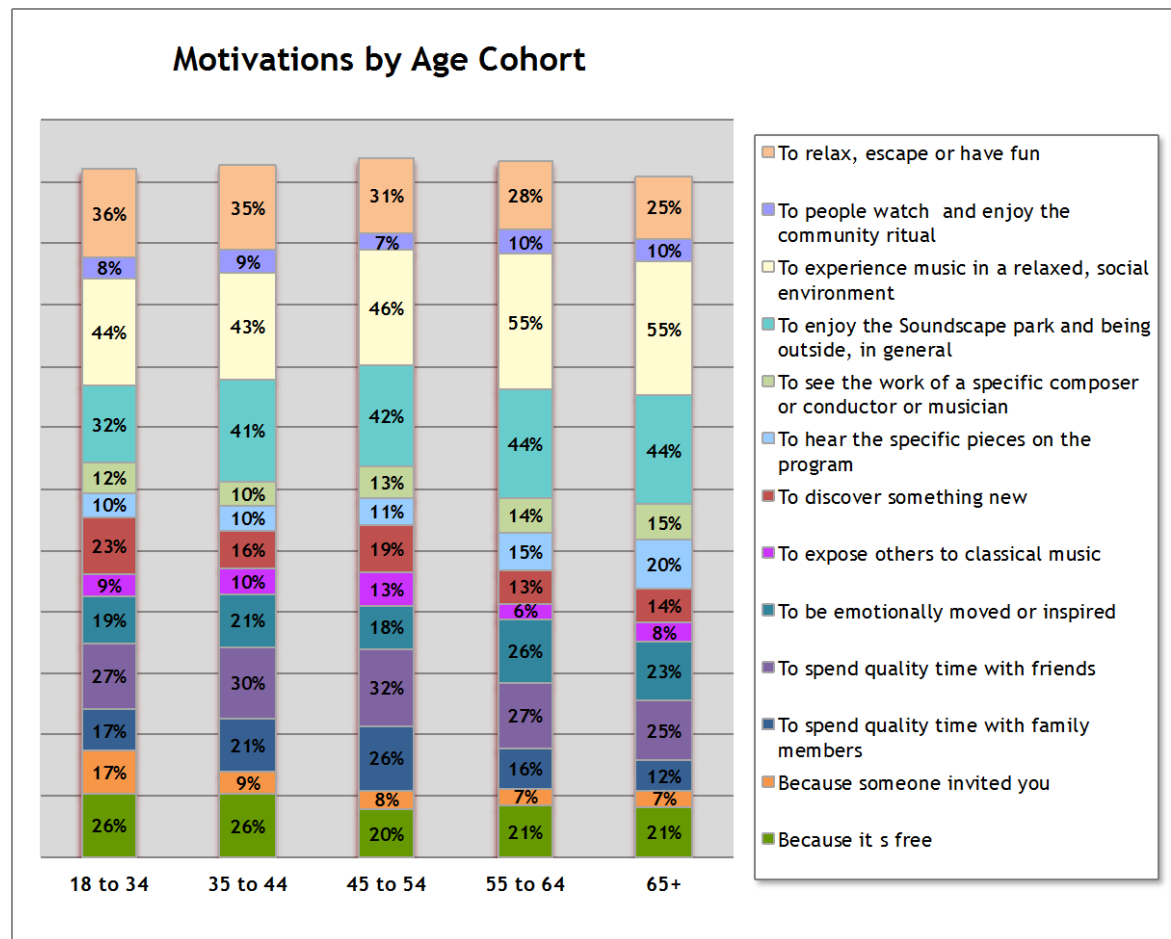
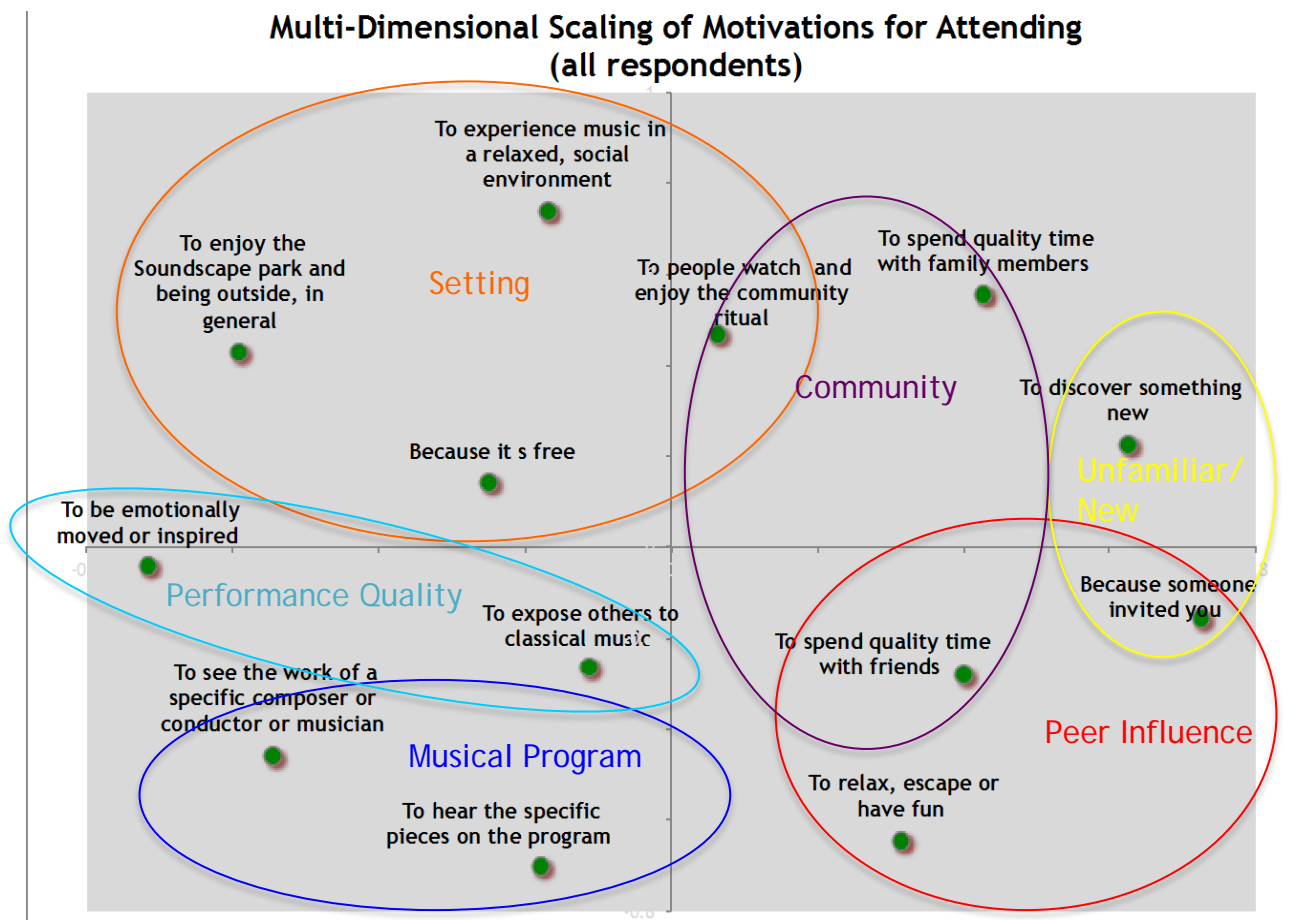


Figure 9 illustrates one way of visualizing motivational data using a technique called multi-dimensional scaling, which places each of the individual motivations in a two-dimensional space, allowing the researcher to see groupings of motivations and infer the meanings of the two axes. Results suggest 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

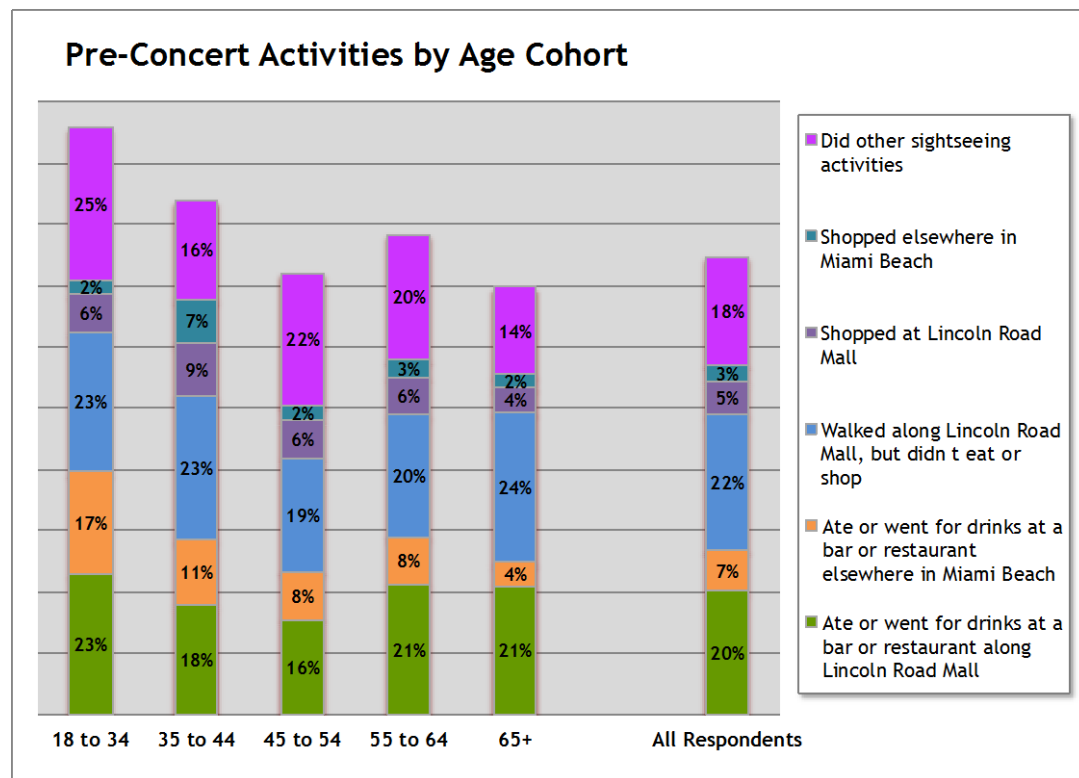


Qualitative data provides further nuance to these findings and underscore the powerful social dynamic. For example, one focus group participant first discovered WALLCAST™ when she was driving by Soundscape Park and, seeing all the people in the park, wondered what was going on. It was the crowd of people – 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

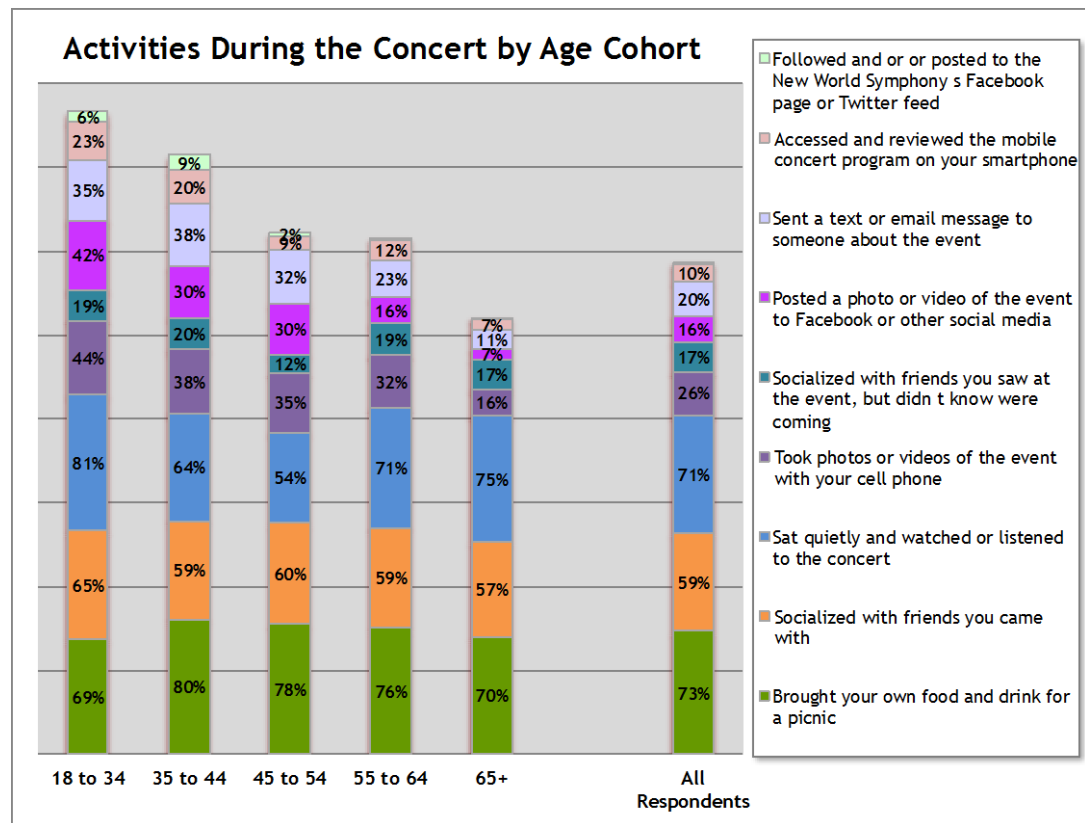
The activities that take place around the actual concert – “the before, the during, and the after” - are what make a WALLCAST™ experience special for so many. Focus group participants described an elaborate procession of activities – arriving an hour and a half to two hours before the concert, claiming 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



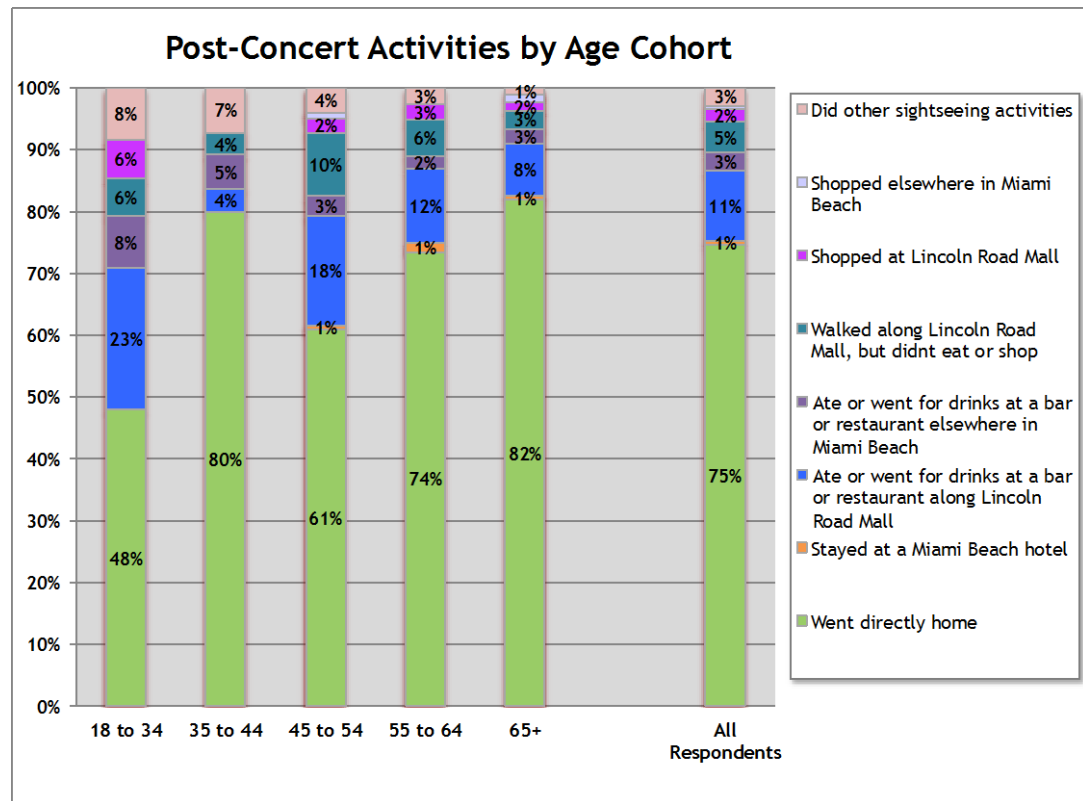
Survey results suggest that Lincoln Road Mall is a significant resource for WALLCAST™ audience members. One in five report eating at a restaurant or going for a drink on Lincoln Road beforehand, and another 22% strolled along the mall without shopping or eating, but likely for window-shopping and people 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 attenders 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 WALLCAST™. For example, Encounters survey respondents reported higher rates of

aesthetic growth than WALLCAST™ survey respondents, with a 4.2 average rating on a scale of 0 to 5 vs. 3.1, respectively for the extent to which the program increased one's appreciation for the music performed (not shown).

On the whole, WALLCAST™ concerts have a positive emotional impact, as seen in the word cloud comprised of emotions audience members reported feeling (see Figure 14). After “happy” and “relaxed,” the most prominent words audience members use to describe their WALLCAST™ emotional journey are “inspired,” “moved,” “excited,” and “appreciative,” along with “emotional” and “wonderful.”

Figure 14: What words best describe how the concert made you feel?

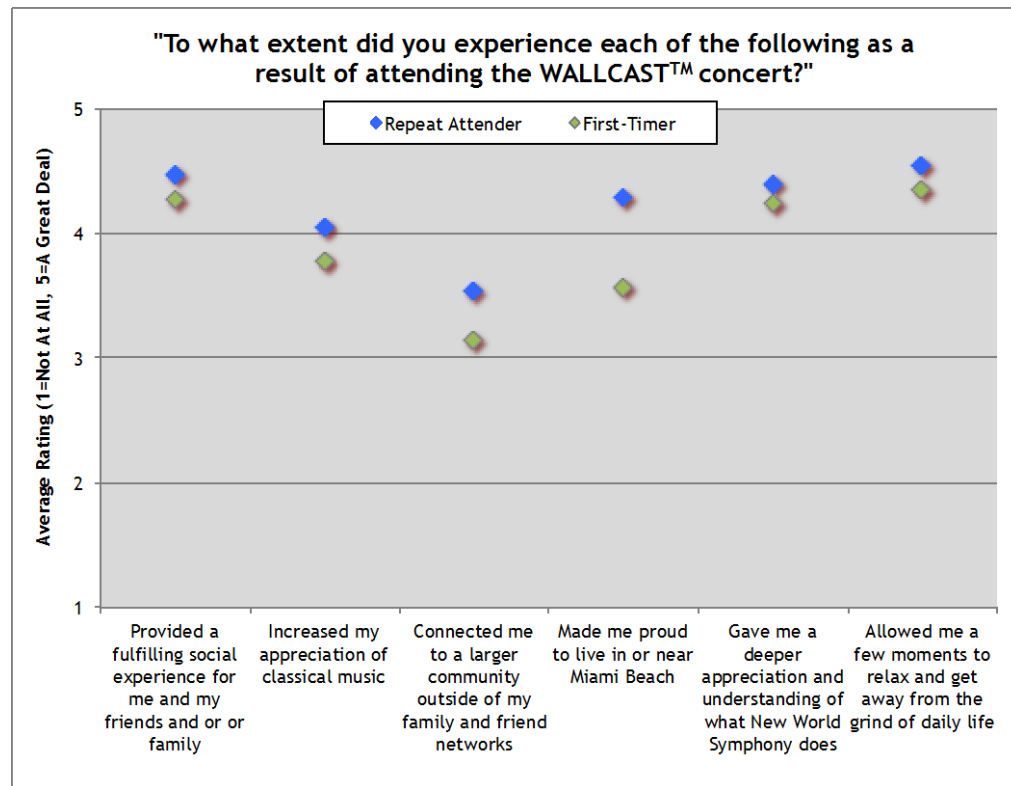


Analysis of additional outcomes audience members experience as a result of the WALLCAST™ experience reinforces the argument that satisfaction and personal fulfillment increase with repeat attendance. As Figure 15 shows, repeat attenders reported higher levels of fulfillment across a range of outcomes, from social and community-based outcomes (“providing a fulfilling experience for me and my friends or family” and “connecting me to larger community”) to organizational and artistic outcomes (“increased appreciation of classical music” and “gave a deeper understanding and appreciation of NWS”). In particular, repeat attenders were much more likely to report that the WALLCAST™ concert they attended “made me proud to live in or near Miami Beach” (4.3 vs. 3.6 for first-timers, who are more likely to be visitors from outside Miami-Dade County).

Survey data suggests that audience members develop a deep affinity for WALLCAST™ concerts and, in turn, for NWS, over time and with repeat exposure. Several interviewees noted that they come to every WALLCAST™ that they can – it is just a “habit,” a part of their regular routine, and that they would be heart-stricken 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% respondents are highly likely to recommend a WALLCAST™ concert 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™

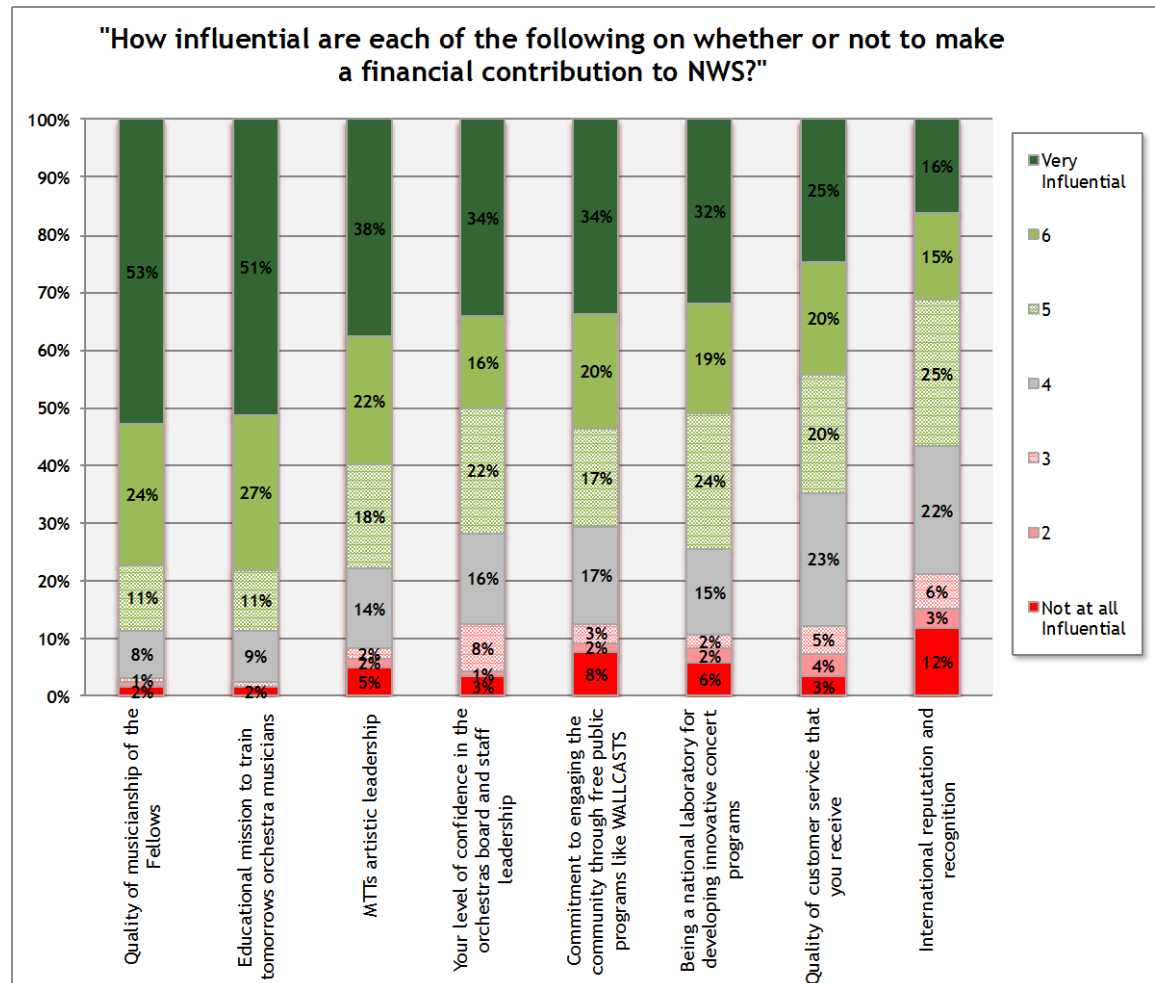
Just 14% of donors who responded to the online survey reported that their NWS gift was designated for WALLCAST™ concerts specifically. Another 14% give for the Building Fund for New World Center, 18% for Fellows’ Scholarships, and 38% stated that their gifts are undesignated. While the 14% figure may 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.

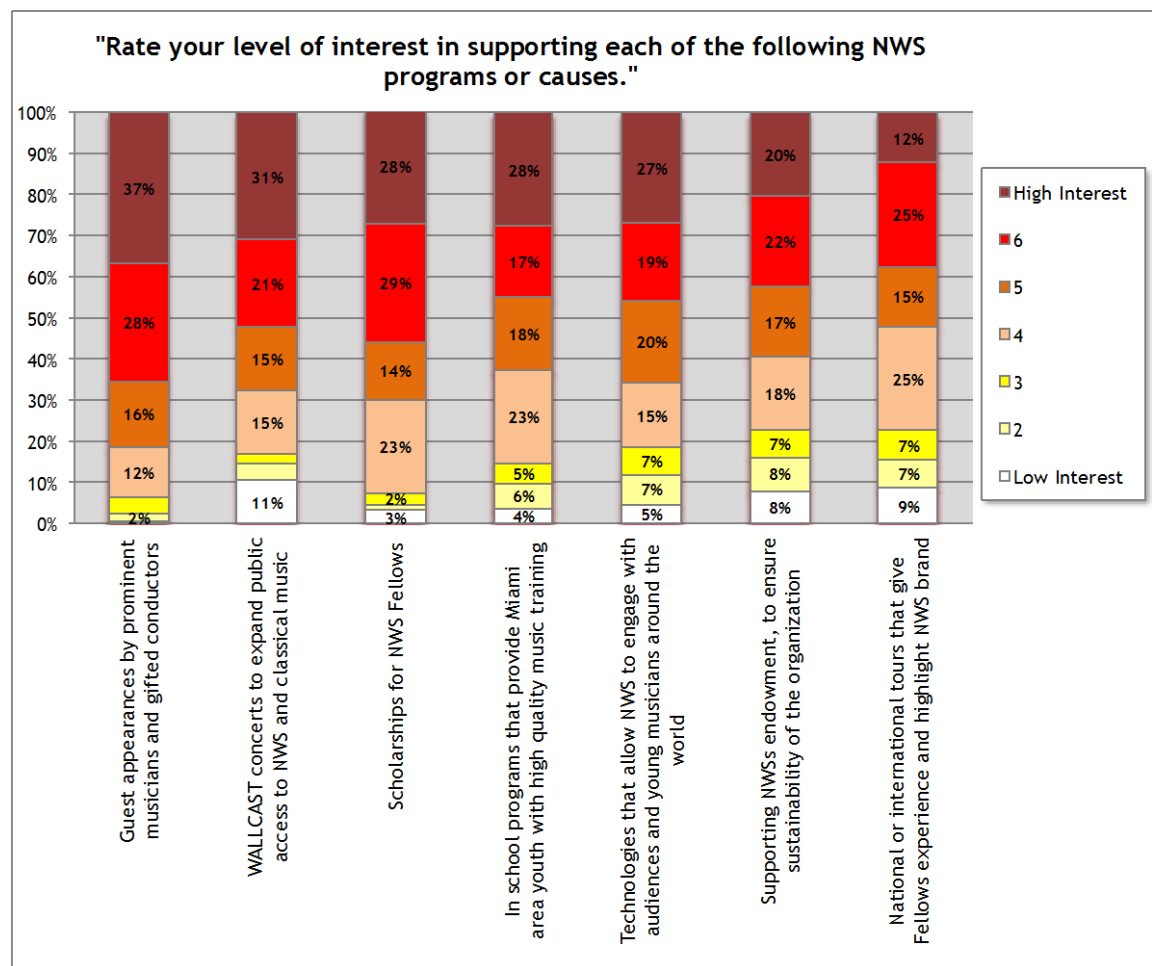
Figure 16: General Motivations for Giving to NWS



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™ concert 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™ is an investment in the future of classical music. Moreover, WALLCASTs™ 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 specifically mentioned how they use WALLCASTs™ 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™ provides 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™ 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™ invites, and even celebrates, 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™ is 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™ to WALLCAST™ 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 WALLCAST™’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 WALLCAST™ 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 starts 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.

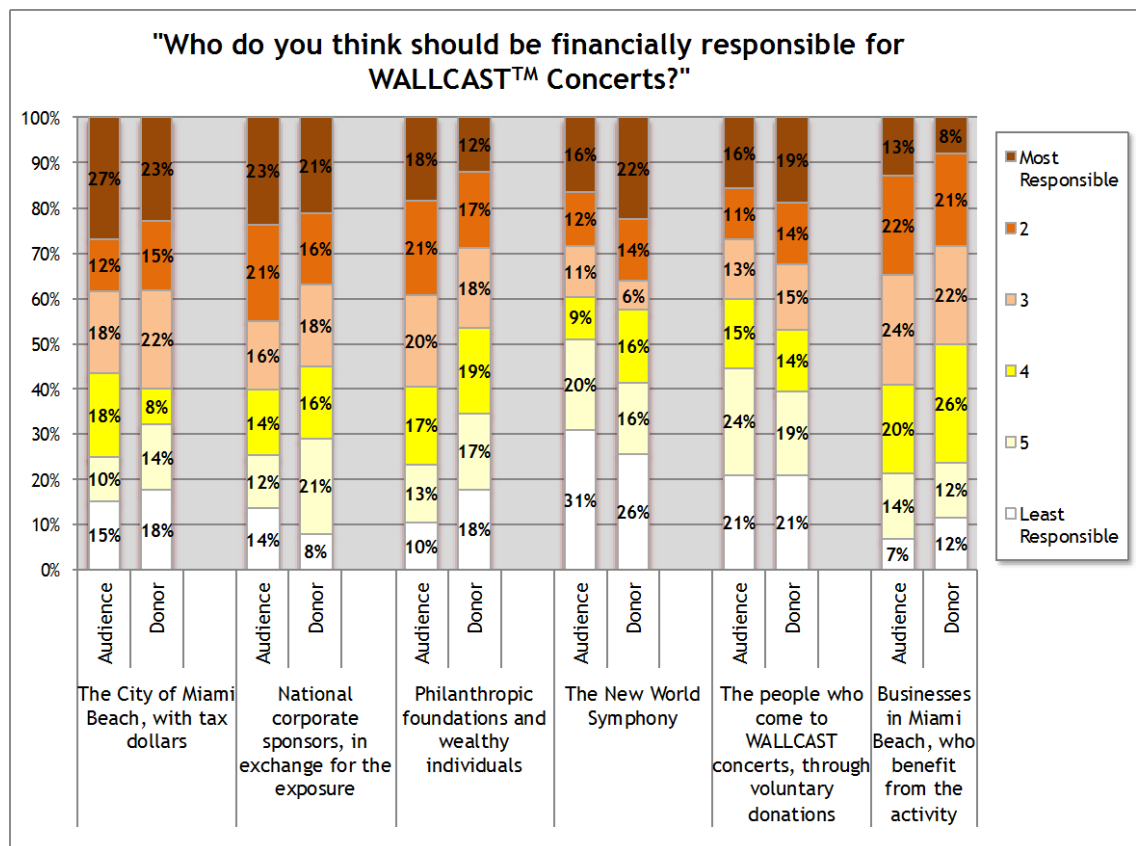
While most people experience pre-recorded (and heavily edited) digital presentations of arts programs, WALLCAST™ concerts have taken the next step, harnessing technology to create a high-definition, immersive digital broadcast of a live performance that allows audience members to step into the orchestra 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 ranking of responsible parties who should financial underwrite WALLCASTs™, they were much less likely to select “philanthropic foundations and individuals” as most responsible, and more likely to hold NWS and people who attend WALLCASTs™ as most responsible. Overall both audiences and donors are conflicted about the responsibility of NWS to underwrite WALLCAST™, 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.

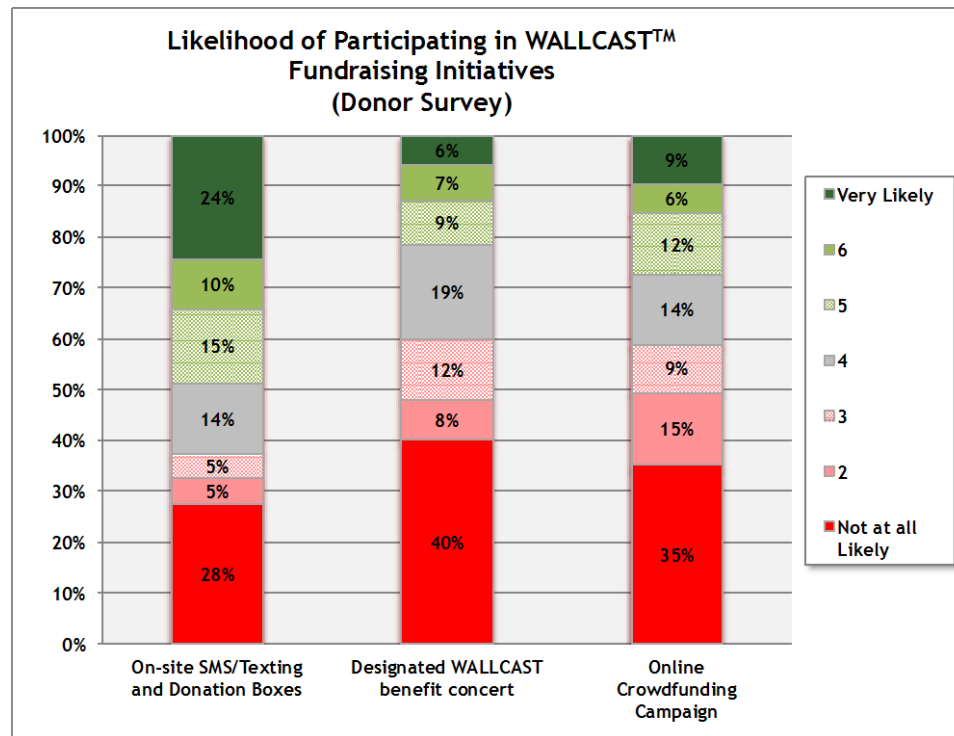
Response to Potential Fundraising Strategies

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.

- **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.
- **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.
- **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™ “on the road” – would further contribute to NWS's brand of openness, inclusivity and experimentation – music for all.
- **Engage more intentionally in placemaking strategies, leveraging WALLCAST™ and Soundscape 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™ and other video programs, although significant additional capital investment would be required.

In many 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 (to be attached)

Audience Survey Pre and Post-Performance Protocols

Intercept Interview Protocol

Focus Group Discussion Guide

Donor Survey Protocol

Stakeholder Interview Protocol

