

Phase 1

December 2024

CultureCheck

Roanoke

Executive Summary _____	3
Purpose _____	3
Methodology _____	3
Respondent Demographics _____	5
Health of the Arts and Culture Sector in Roanoke After COVID-19 Pandemic _____	8
Ticket Sales & Attendance _____	9
Engagement & Education _____	10
Financial Support Trends _____	12
Risks to Organization Sustainability: Funding & Personnel _____	15
Organizations Struggle to Find Qualified Candidates for Staff, Board, and Volunteer Positions _____	15
Respondents’ Perceptions of Fiscal Health Signify a Need for Increased Funding Initiatives _____	17
How Arts and Cultural Organizations View Collaboration with Key Stakeholders _____	20
Grateful for City Support, Organizations Request Increased Funding _____	20
Collaboration within the Arts and Culture Sector _____	21
Areas of Interest for Arts and Culture Sector in Roanoke Community _____	22
Individual and Community Health and Wellness Play a Significant Role Within the City of Roanoke Arts and Culture Ecosystem _____	23
Social Justice is a Key Concern for Many Arts and Culture Organizations _____	24
Breaking Boundaries: Arts and Culture Organizations are Expanding Audiences _____	25
Committed to the Current Audience, Aware of the Need for Adaptation _____	25
Connecting with the Whole Roanoke Community: Certain Groups are Underrepresented in Arts and Culture _____	26
Listening Session Respondents Enjoy Regional, National, and International Recognition _____	28
Arts and Culture Organizations Utilize a Variety of Strategies to Program for New Audiences _____	28
Resilience and Recovery in a Peer City _____	30
Greenville, South Carolina _____	30
Dubuque, Iowa _____	30
CultureCheck Roanoke: Phase 1 _____	1

Suggested Further Lines of Inquiry	32
Ticketing and Attendance Data, 2019-now	32
Community Perceptions of Arts and Culture Organizations	32
Funding Composition: Earned versus Contributed, 2019-now	32
Expansion of inquiry to individual artists	32
Inclusive Analysis of Arts and Culture Ecosystem	33
CultureCheck Roanoke	34
About PA CultureCheck	34
About The Roanoke Arts Commission	34
About The Roanoke Cultural Endowment	34
About The Virginia Tech M.F.A. in Arts Leadership	34
About the Researchers	35
Appendix A: Survey Questions Posed	37
Appendix B: Listening Session Questions Posed	38

Executive Summary

Purpose

Inspired by [PA CultureCheck](#), CultureCheck Roanoke aims to gather insights from Roanoke’s arts and culture organizations, individual artists, art galleries, and partner institutions to understand their post-pandemic recovery and renewal. This initiative seeks to identify and examine emerging trends, practices, needs, challenges, and aspirations within Roanoke’s arts and culture ecosystem. The findings will inform advocacy and marketing strategies, support the development of a new strategic plan for Roanoke Arts & Culture, and enhance the overall engagement and impact of the arts in the community.

This report represents Phase 1 of the CultureCheck Roanoke study. We extend our special thanks to Kristen Vinh and Nick Crosson from PA CultureCheck for their invaluable guidance and support. We also acknowledge the crucial role of Roanoke’s arts and culture organizations, along with the [Roanoke Arts Commission](#) and the [Roanoke Cultural Endowment](#), whose collaboration and commitment have been instrumental in this endeavor.

Methodology

This phase of CultureCheck Roanoke took place between September and November of 2024. Our team assessed the current arts and culture landscape in Roanoke, Virginia and its organizations’ current state as juxtaposed with pre-COVID operations, resources, and connections to the Roanoke population and government. We did preliminary research on peer cities, Roanoke City and Roanoke County demographics.

Next, our team distributed an online survey to each of the 33 arts and culture organizations currently receiving support from the Roanoke Arts Commission. These entities are connected to the “It’s Here! Roanoke” initiative and listed on their website. The survey was conducted employing the online tool QuestionPro, available through Virginia Tech’s resources.

All 33 organizations were also invited to participate in listening sessions with our research team. For this phase of our research, we conducted eight listening sessions representing eight total organizations. One session was conducted in person, one via phone and the other five via Zoom. Each listening session had two researchers present as we wanted to reduce bias. Our listening session survey questions identified the community impact of organizations’ work, primary audiences and whether they have changed, trends in audience return, and relationships with the city and government of Roanoke. Data was recorded by both typed notes, audio recorded sessions, and transcribed recordings. Our

team wanted to code both direct quotes and recorded notes to take into account direct source and secondary source perspectives.

Of the 33 organizations solicited, we received 27 survey responses, for a response rate of 82%.

For the listening sessions, our team employed qualitative inductive coding, where we identified central themes of the research through close analysis of the survey and listening session data. To reduce bias, each team member coded materials from a listening session for which they were not present. From this analysis, we identified key themes that applied to multiple of the eight respondents. We then analyzed the online survey with a similar lens in addition to pulling data from quantitative questions.

It is significant to mention that our team also employed Notebook LM to test how the tool would perform inductive qualitative coding. Notebook LM identified many of the same themes we recorded and served as a useful tool for finding quotes. However, the site also misinterpreted transcripts, data, and notes on several occasions. We determined that this AI tool is not a fully reliable source for analyses and definitive conclusions.

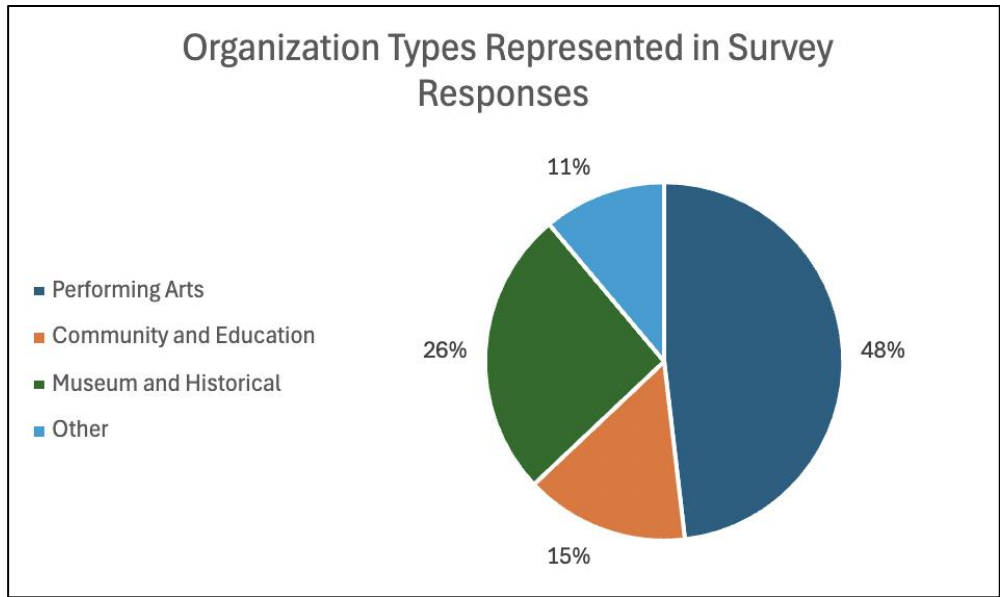
Respondent Demographics

Of the 33 organizations solicited for a survey response, we received 27 responses, for a response rate of 82%. The organizations who completed the survey are as follows:

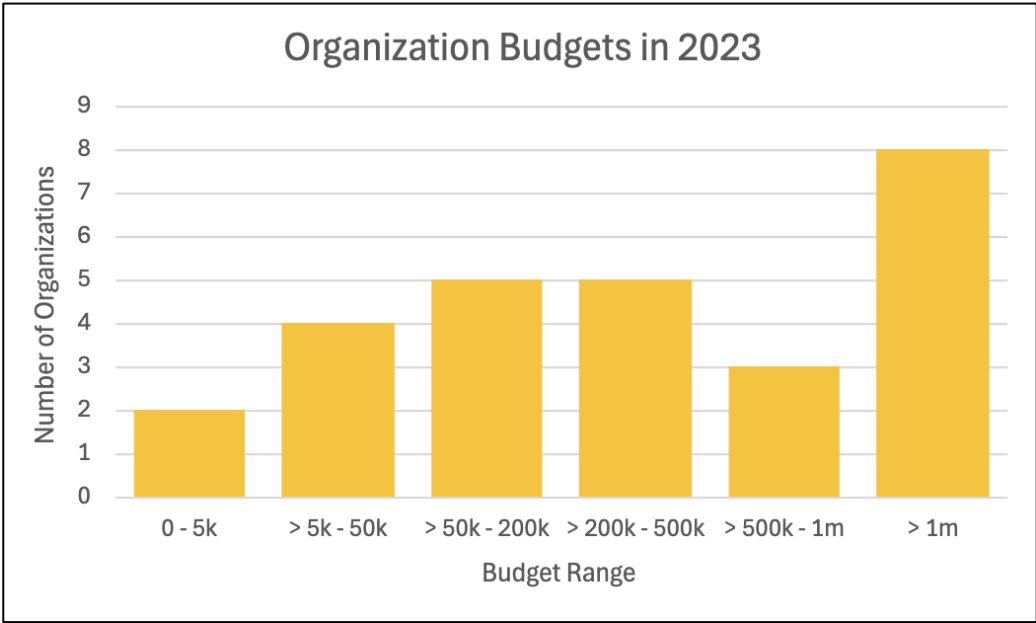
5 Points Music Foundation	Mish Moves Dance Company
Berglund Center	Opera Roanoke
Carilion Keeley Healing Arts Program	Roanoke Ballet Theatre
Center in the Square	Roanoke Symphony Orchestra
CommUNITY ARTSearch	Roanoke Valley Children's Choir
Eleanor D. Wilson Museum at Hollins University	Roanoke Valley Sister Cities
Grandin Theatre	Roanoke Baroque
Harrison Museum of African American Culture	Science Museum of Western Virginia
Historical Society of Western Virginia	Southwest Virginia Ballet
Jefferson Center	Taubman Museum of Art
Local Colors of Western Virginia	VA Museum of Transportation, Inc.
Mental Health in Motion	Virginia Children's Theatre
Mill Mountain Theatre	Winds of the Blue Ridge
Mill Mountain Zoo	

Of the 33 organizations solicited for a listening session, we spoke to representatives from the following eight organizations:

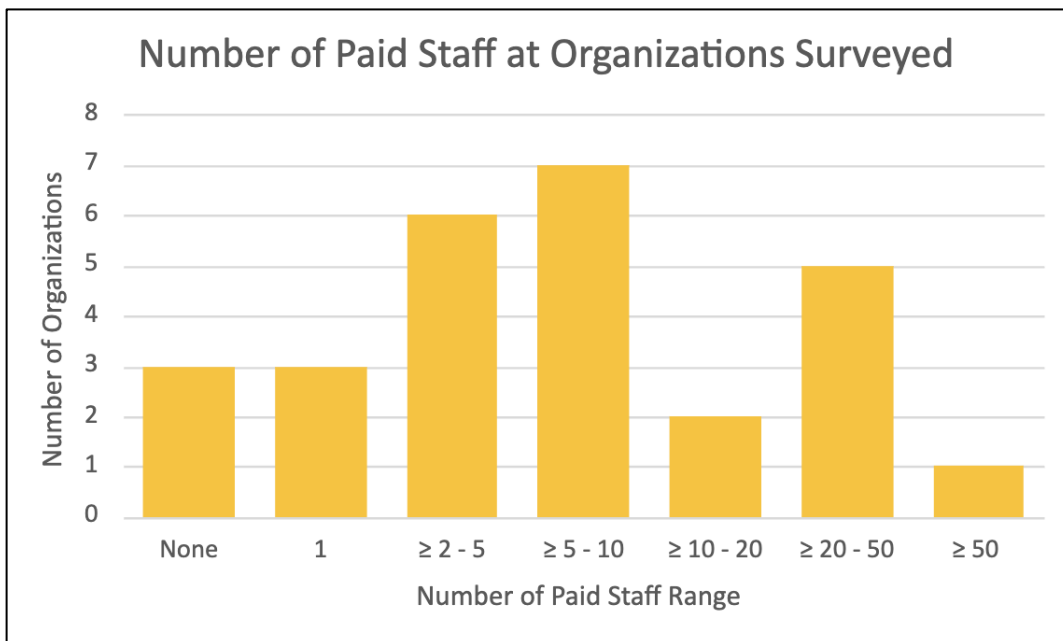
Artemis Journal	Mill Mountain Theatre
Carilion Keeley Healing Arts Program	Roanoke Symphony Orchestra
Jefferson Center	Southwest Virginia Ballet
Mental Health in Motion	Taubman Museum of Art



We received 13 responses from performing arts organizations, four community and education organizations, seven museum and historical organizations, and three organizations that categorized their purpose as “other.”



Of the 27 organizations surveyed, six had budgets of \$50,000 or less in 2023, ten had budgets between \$50,000 and \$500,000, and 11 had budgets of over \$500,000.



Six responding organizations have either zero or one paid staff member. 13 organizations currently have between two and ten paid staff members. Eight organizations surveyed have over ten paid staff members.

Limitations of the Study

Stakeholders studied. With more time, a comparative analysis between arts and culture organizations in Roanoke versus independent artists would have painted a more holistic picture of Roanoke’s artistic and cultural health.

Organizations reached. CultureCheck Roanoke: Phase 1 intentionally focused on the arts and culture organizations that currently receive support from the Roanoke Arts Commission and who will be eligible to receive support from the Roanoke Cultural Endowment. The data and findings within this report are not representative of the full arts and culture ecosystem of Roanoke.

Cultivating relationships with organizations. The research team was intended to be a neutral third party, but certain research team members had existing relationships with some respondents based on prior academic and professional experience.

Health of the Arts and Culture Sector in Roanoke After COVID-19 Pandemic

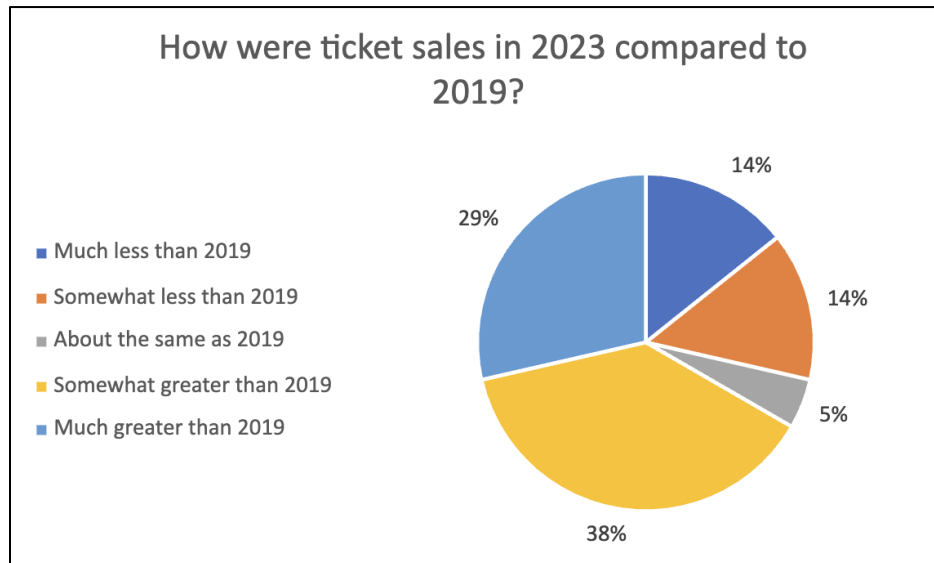
“COVID sucked - However, it did give us the gift of time, which, [as an organization] that produces 12 months out of the year - we never had time...COVID gave us that pause that we needed to look at things internally”

A central element of this study was to articulate how the arts and culture sector fared through and was recovering from the COVID-19 pandemic. For the study's purposes, we considered the pandemic to take place from spring 2020 through summer 2023 and held conversations about Roanoke arts and culture organizations experience from 2019 through 2023.

How was engagement in 2023 compared to 2019?						
Statement	Not measured	Much less than 2019	Somewhat less than 2019	About the same as 2019	Somewhat greater than 2019	Much greater than 2019
Ticket sales	22%	11%	11%	4%	30%	22%
Attendance	0%	15%	15%	11%	33%	26%
Number of engagement events	0%	11%	4%	26%	33%	26%
Digital metrics	15%	4%	4%	11%	37%	30%
Donor retention	11%	4%	19%	33%	15%	19%
First-time donors	19%	7%	7%	19%	33%	15%
Subscriptions/memberships	30%	19%	11%	4%	26%	11%
Other	59%	4%	0%	0%	15%	22%

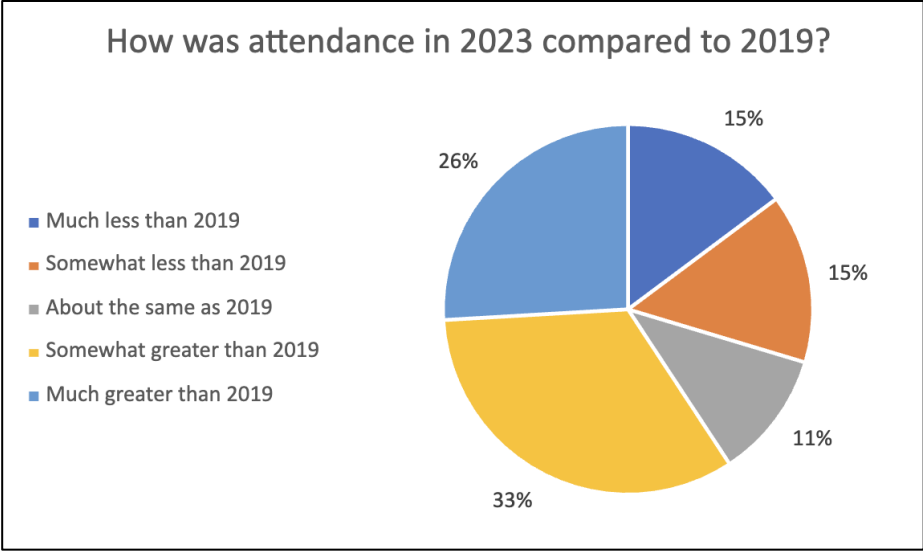
The shading on the heatmap chart indicates the response percentage of each engagement metric. The darker the cell, the higher the proportion of organizations that selected the answer. We intentionally included those who reported they do not measure specified engagement metrics to display a more accurate picture.

Ticket Sales & Attendance



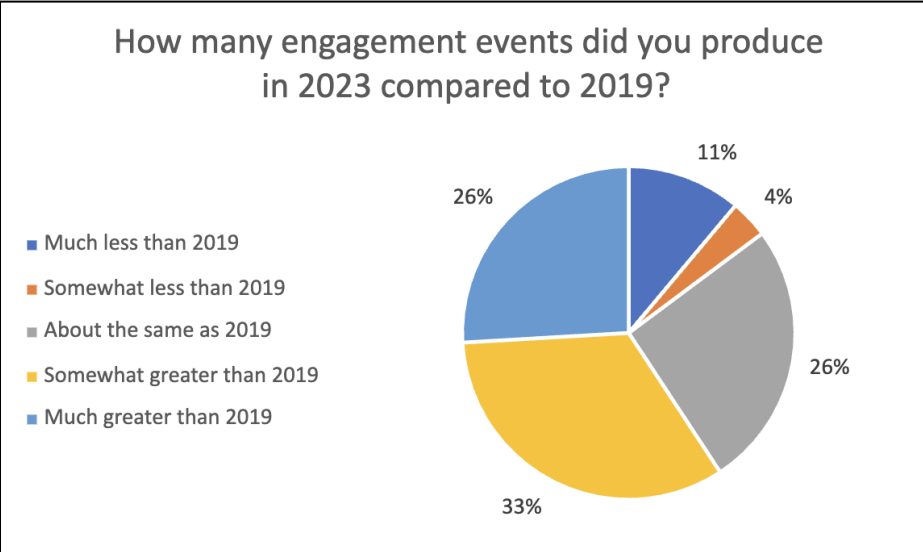
This chart does not include survey respondents who reported they do not measure ticketing sales data.

72% of survey respondents who measure ticket sales report that their ticket sales are about the same as or higher than their 2019 ticket sales, with almost 30% of those measuring ticket sales noting that they are “much greater than 2019.” Similarly, 70% of survey respondents saying that attendance for their organization is the same or higher than their 2019 attendance numbers, with 26% saying that their attendance has been “much greater than 2019.” This indicates an overall resilience within the arts and culture sector within Roanoke, compared to the national picture which still shows that most organizations are [still struggling](#) to meet or exceed pre-pandemic ticket and attendance metrics.



Engagement & Education

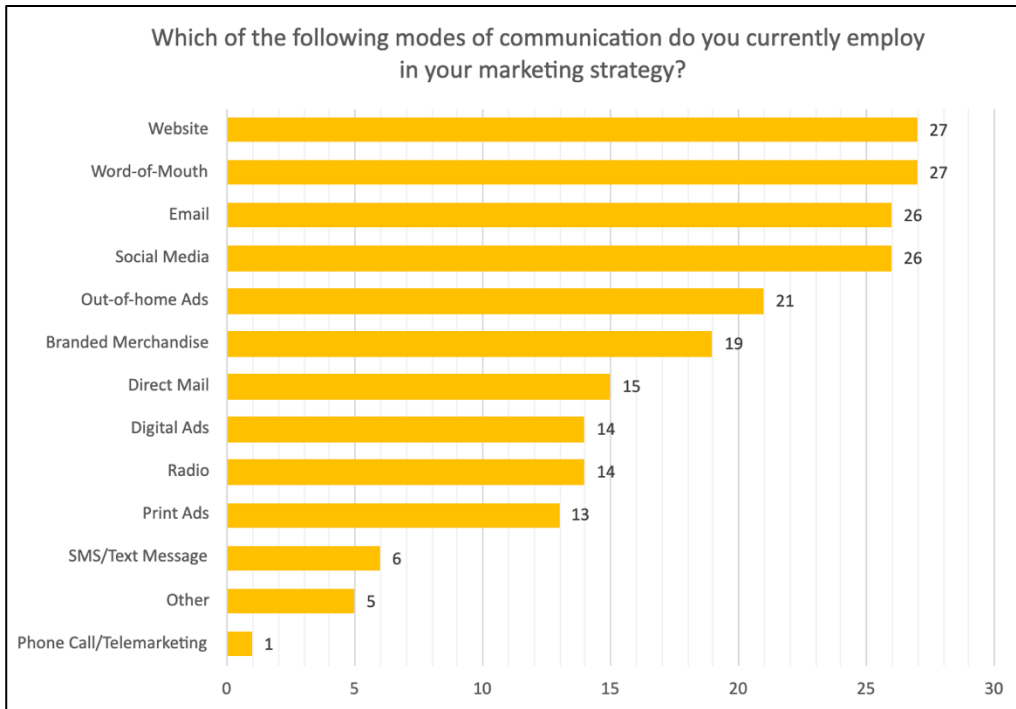
For many arts and culture organizations across the country, the onset of the pandemic and the closure of physical gathering spaces meant that they [turned to digital programming](#) to fill the gap. The CultureCheck Roanoke team was interested in how this shift in program delivery had impacted program offerings in 2023. Of the survey respondents, 85% reported that their organization produced about the same number or more engagements in 2023 compared to 2019, suggesting that in terms of volume, output of arts and culture organizations has returned to pre-pandemic levels for most organizations. Further, almost 60% percent of all survey respondents shared that they are producing more engagements than they were in 2019.



We found that **100% of survey respondents deliver in-person programming of some type**. Of that, 18 of the 27 survey respondents reported that they deliver exclusively in-person programming. This in-person programming is not limited to offerings within their facilities, as five of the 27 respondents shared that they participate in off-site engagement. The shift in program location was cited by three respondents as an intentional choice to better engage members of their community, who were not engaging with the organizations in their usual facilities. Three respondents also articulated a difficulty getting students and children to engage in education programming. One respondent said, “It's harder to get kids who are used to being at home to participate in an out-of-school program...We're changing what we're doing in this program to be more tactical.” More information about how arts and culture organizations are serving the Roanoke Valley community through education is available later in this report.

One survey respondent shared, “We have had to change completely our program offerings to bring the program straight to the communities that need it as opposed to expecting them to come to us. So, we have moved to doing more outreach and away from large-scale performances.” Another respondent articulated that there is tension between their desire to do more off-site engagement to engage new audiences and the duty they feel to deliver familiar programming to continue to engage their core audience. One respondent shared that the opposite was true and that “requests by families in our areas of outreach after the pandemic” have led them to purchase a brick-and-mortar for the first time, but it is not clear from available data if their programming has consolidated into one location. Based on our survey and listening session data, many arts and culture organizations are actively experimenting or open to experimenting with how to deliver programming in line with audience preferences. **In other program delivery methods, nine of the organizations represented are presenting programming online.** This iteration of the organization survey did not ask what digital programming organizations are producing. Through our listening sessions we found that two organizations have increased their national and international engagement by providing free, digital versions of their programming via their website.

Beyond providing an opportunity for a wider patron base through digital programming, digital media also now plays an integral part in many organizations' marketing and publicity strategies. Of the surveyed organizations, 100% use some type of digital media in their marketing strategy. Of that, the breakdown of digital and physical media is as follows:

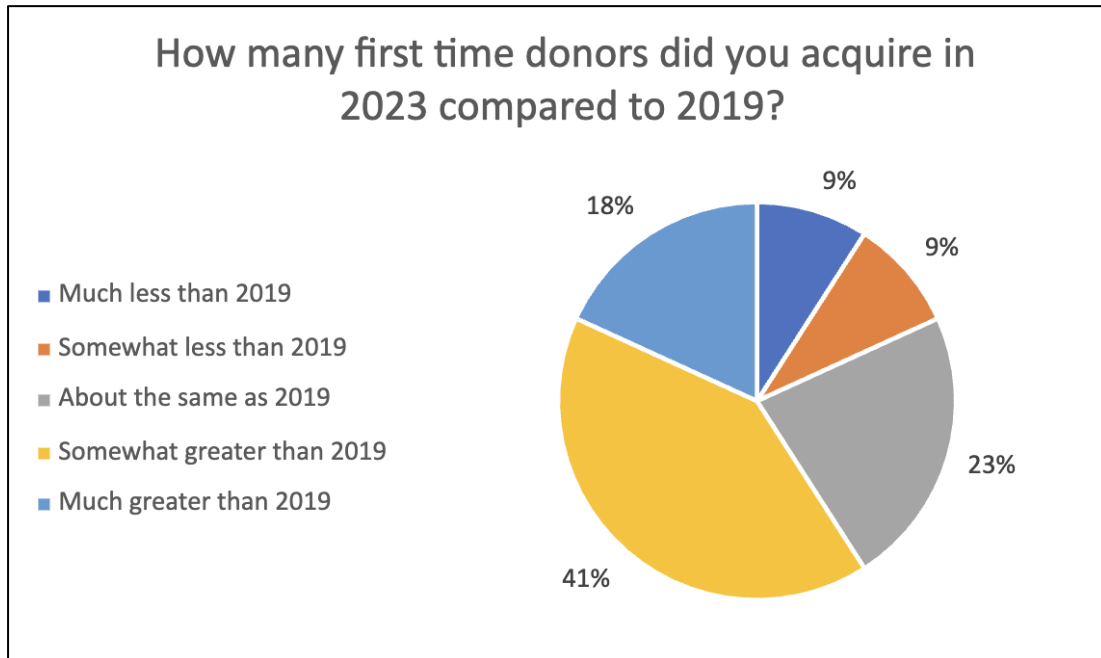


Financial Support Trends

While attendance and overall engagement numbers are useful metrics to understand the health of the arts and culture sector in Roanoke, it is also important to consider organizational fiscal health and overall sustainability of individual programs. To gain a clearer understanding of how organizations are supported financially, we asked survey respondents to provide data about membership/subscription trends, first time donors, and overall donor retention from 2019 to 2023. Due to the scope of Phase I, we did not collect annual data related to these metrics. We found that most survey respondents reported growth across all three metrics, suggesting growing support for the arts and culture sector in Roanoke. What remains to be seen is if donation and engagement levels can sustain the rising costs of production within the sector.

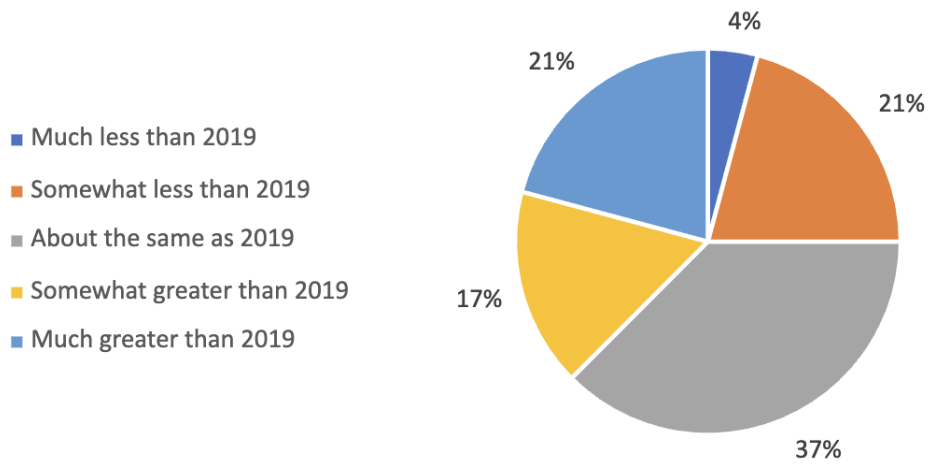
Contributed revenue is an essential part of mission delivery for arts and culture organizations, whether from government granting programs or individual, corporate, or foundation support. Considering that the 33-organization sample set was chosen because each organization currently receives financial support from the Roanoke Arts Commission, the research team decided to look exclusively at first-time donor and donor retention metrics as opposed to a more holistic breakdown by organization of contributed revenue sources. As later phases of this research progress we encourage inquiry along this line, as a realistic breakdown of this information within the wider philanthropic landscape may

prove useful for future initiatives of the Roanoke Arts Commission and the Roanoke Cultural Endowment.



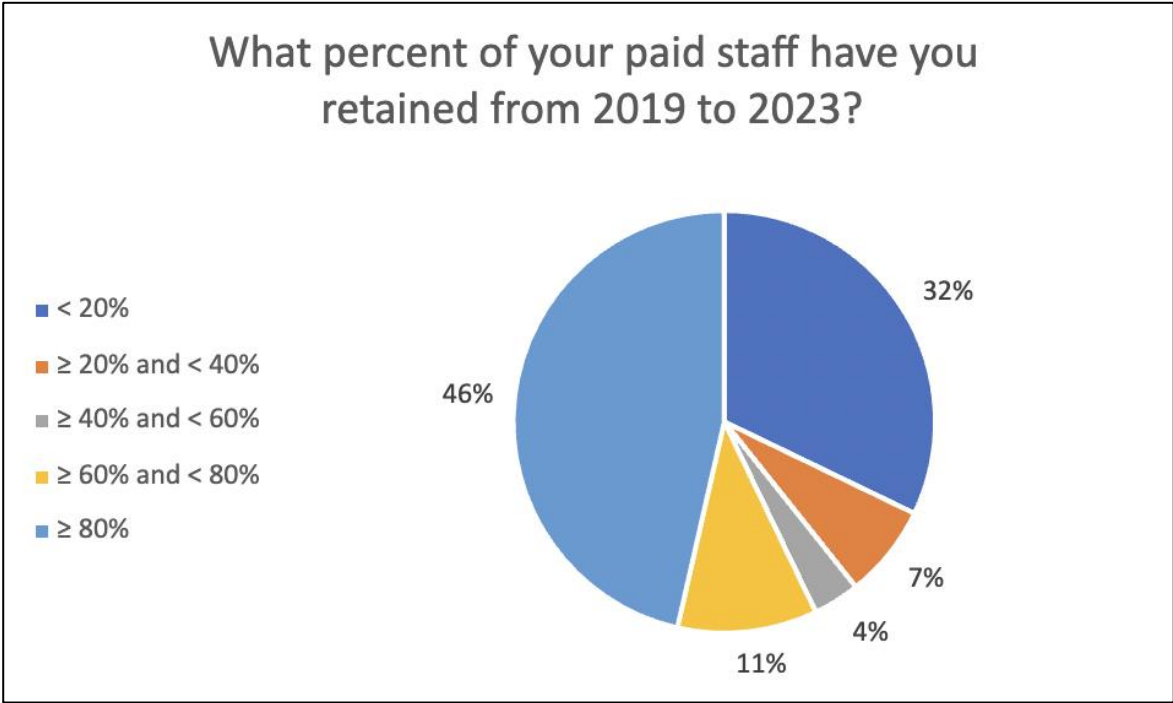
Of our survey respondents who measure first-time donorship, 59% reported somewhat greater or much greater numbers of first-time donors between 2019 and 2023. Only four of the 27 survey respondents shared that their first-time donorship was somewhat or much less in 2023 than in 2019. As generating first-time donorship can be a drain on organization resources, most support comes from consistent annual giving. To measure this, we inquired about donor retention from 2019 to 2023 and found that 75% of arts and culture organizations who measure donor retention maintained about the same or greater levels of donor retention in that period. While this data supports the idea that support for the arts and culture within Roanoke is consistent, it may not display the full picture. To do so, a detailed analysis of individual and corporate donor giving may yield a more robust analysis. Later sections in this report also speak to the challenges that organizations face regarding contributed revenue and overall fiscal health.

How was donor retention in 2023 compared to 2019?

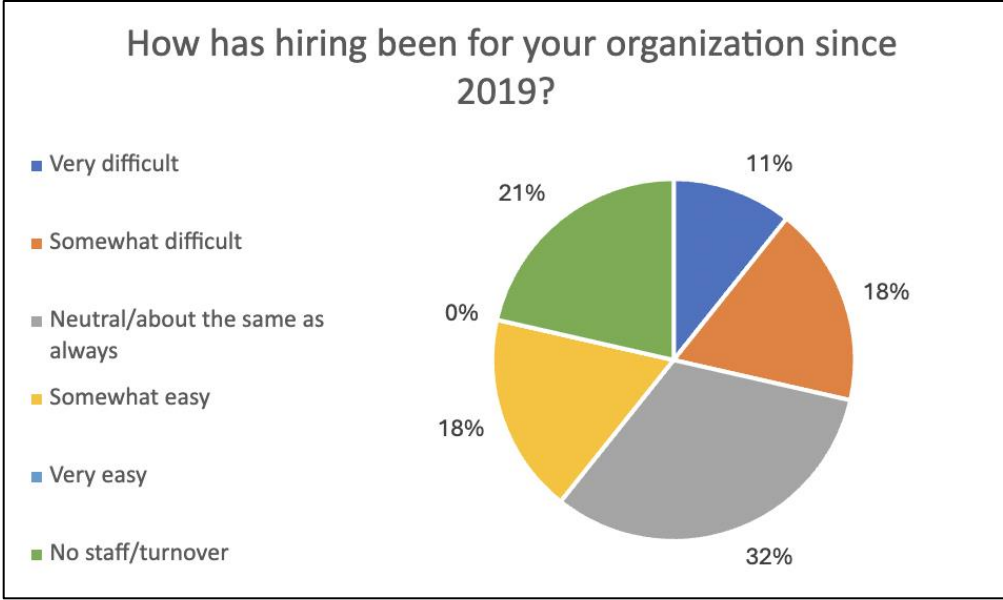


Risks to Organization Sustainability: Funding & Personnel

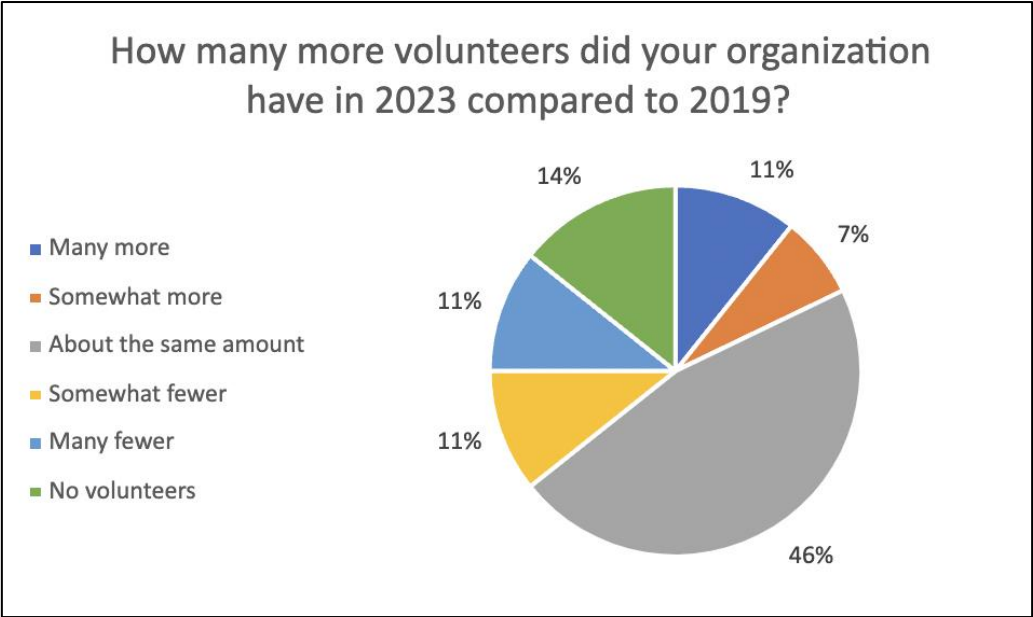
Organizations Struggle to Find Qualified Candidates for Staff, Board, and Volunteer Positions



Almost half of organizations surveyed stated that they have retained 80% or more of their employees since 2019; for comparison, the annual nonprofit turnover rate is [about 20%](#). However, as organizations attempt to fill staff vacancies, zero survey respondents reported that hiring has been “very easy” since 2019. One organization described the many variables assessed when finding the right person; “It can be hard to find that right person. Who can do the job? Fits culturally? Believes in the mission? It's a lot of variables that must come together.” Another discussed their funding as a limiting factor for hiring new talent; “If I had the budget to hire two more full-time people, it would be incredible. We don't have it right now.”



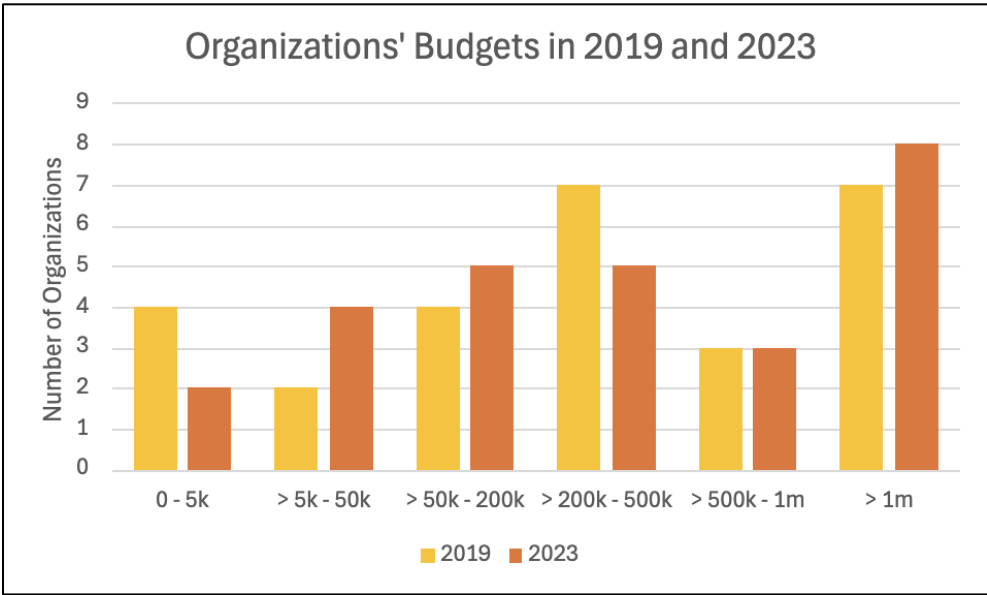
While half of the listening session respondents described struggling to hire staff, two respondents discussed issues finding new board members, and one mentioned volunteer retention. Especially regarding board make-up, diversity was cited as important; “It doesn't help when you just operate in a bubble, and you're talking to people and bouncing ideas around people that have the same ideas as you.” Three respondents discussed their strategies for retaining personnel such as providing benefits, training, career support, and overall making personnel feel wanted. However, one organization mentioned how volunteer retention is at odds with increasing staff size, saying how “when we had a full-time person here, the volunteers went.”

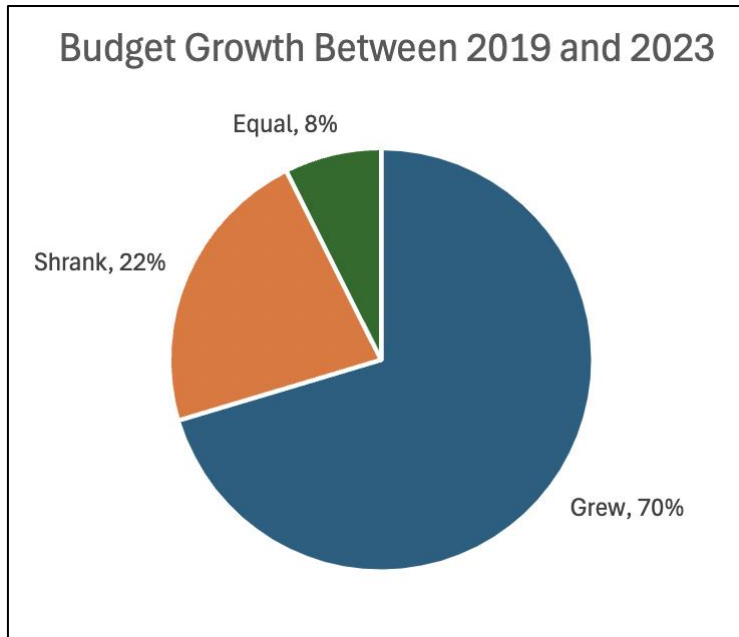


Respondents' Perceptions of Fiscal Health Signify a Need for Increased Funding Initiatives

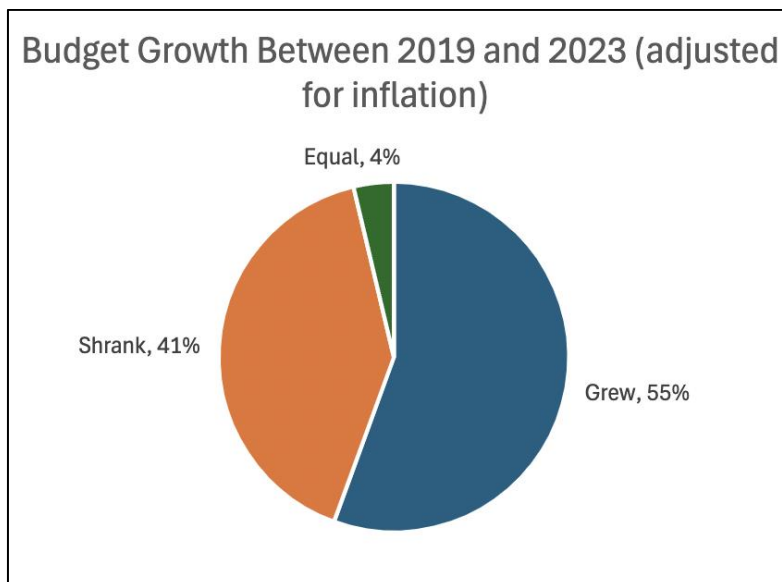
Our findings paint a picture of resilience and resourcefulness within Roanoke's arts and culture organizations. The organizations constantly adapt to financial challenges, explore new funding avenues, and advocate for increased support from the City of Roanoke.

Looking at the initial survey responses, the data suggests an optimistic outlook on the budgetary growth of organizations between 2019 and 2023; with half of the smallest organizations reporting that they experienced financial growth.





While it may initially seem as though three quarters of organizations’ budgets grew or were maintained between 2019 and 2023, adjusting budget numbers for inflation tells a different story. Once adjusted for inflation to 2023 rates, just over half of the organizations surveyed experienced financial growth between 2019 and 2023, while over a third of organizations’ budgets shrank. Inflation was specifically mentioned as a challenge by three of our eight listening session respondents but was not articulated as a challenge by any of our survey respondents. What was reiterated by most organizations was how rising costs for insurance, utilities, and other operational expenses, along with the need for more, better qualified staff add to the financial strain and increase the need for support from external sources.



"We always want more support. You know, a heftier grant... We're a nonprofit. We basically pay for our [cost]. And it's a struggle because [costs] go up every year..."

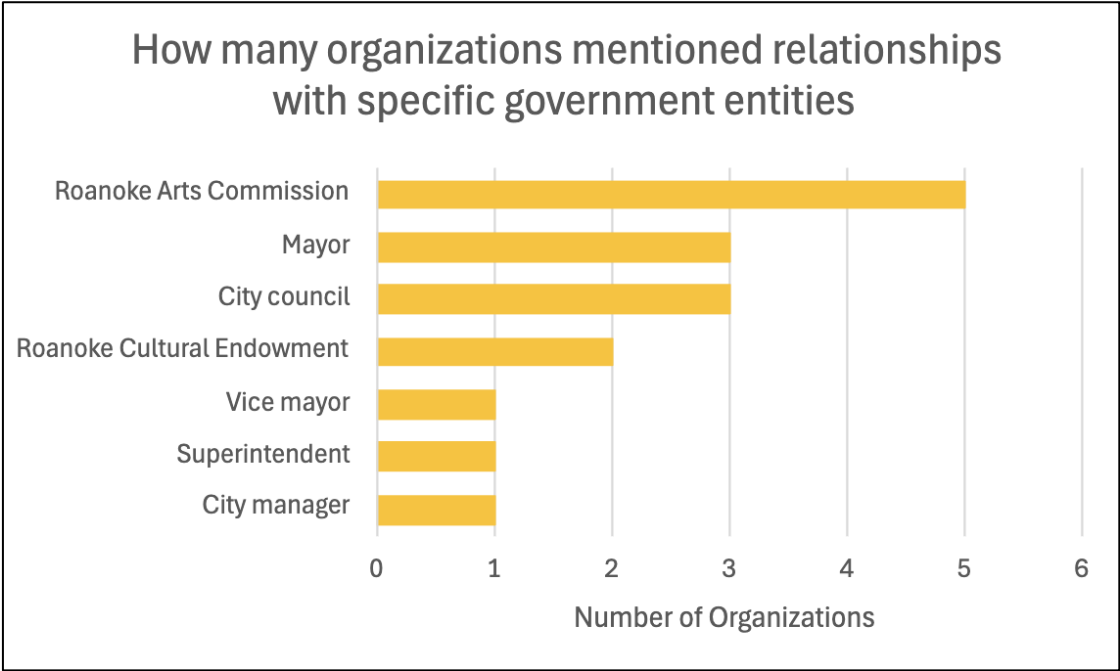
After hearing from our listening session respondents, we found that despite the perception of a positive relationship with the City of Roanoke Municipality, there is a perceived discrepancy between appreciation for the arts and the level of financial support. This research suggests that Roanoke's arts and culture organizations face significant funding challenges, including heavy reliance on grants, rising operational costs, and economic uncertainties. While the Roanoke Arts Commission is mentioned as a significant source of grant funding by eight of our 27 respondents, 100% have received financial support in some way. The competitive nature of grant applications and the fluctuating availability of funds from the Roanoke Arts Commission were mentioned by six out of the 27 total respondents as a concern. Considering that many organizations depend on grants, the increasing competition for local grants is contributing to the perception of scarcity among organizations, leading to less programmatic risk-taking.

"[The] biggest challenge is tension between creating art for profit and creating art for the people..."

Government grants were not the only source of contributed revenue mentioned by our respondents as many are pursuing other available solutions to rising costs. The two most notable were efforts to establish or bolster existing endowments which were mentioned by two out of the eight listening session respondents, and alternative funding methods such as crowdfunding likewise mentioned by two of the eight listening session respondents. It was noted by one organization that external factors, such as inflation and elections, further impact the availability of grants and level of individual and corporate donations.

How Arts and Cultural Organizations View Collaboration with Key Stakeholders

Grateful for City Support, Organizations Request Increased Funding



100% of listening session respondents express a positive relationship with the City of Roanoke. Overall, organizations appreciate their relationships with the different members of the government, especially regarding municipality leadership attending events. Even though the Roanoke Cultural Endowment (RCE) is a partially private entity, two respondents mentioned RCE as one of their government relationships. Five of eight listening session respondents explained their reliance on government funding, with half advocating a need for more funding from the local government, especially in the form of grants. Despite the good relationships with government-affiliated persons, one organization explained that “the City is supportive, but the funding isn’t being either maintained or growing.” While some respondents recognized that the government is doing what they can with limited funding from yearly budgets, the data shows a need to actively strengthen grant funds for organizations.

Aside from grants, one organization spoke of difficulty generating relationships with the government: “...there's more work to be done, and I think sometimes it feels like there are barriers [to building relationships] where there shouldn't necessarily be barriers.” This

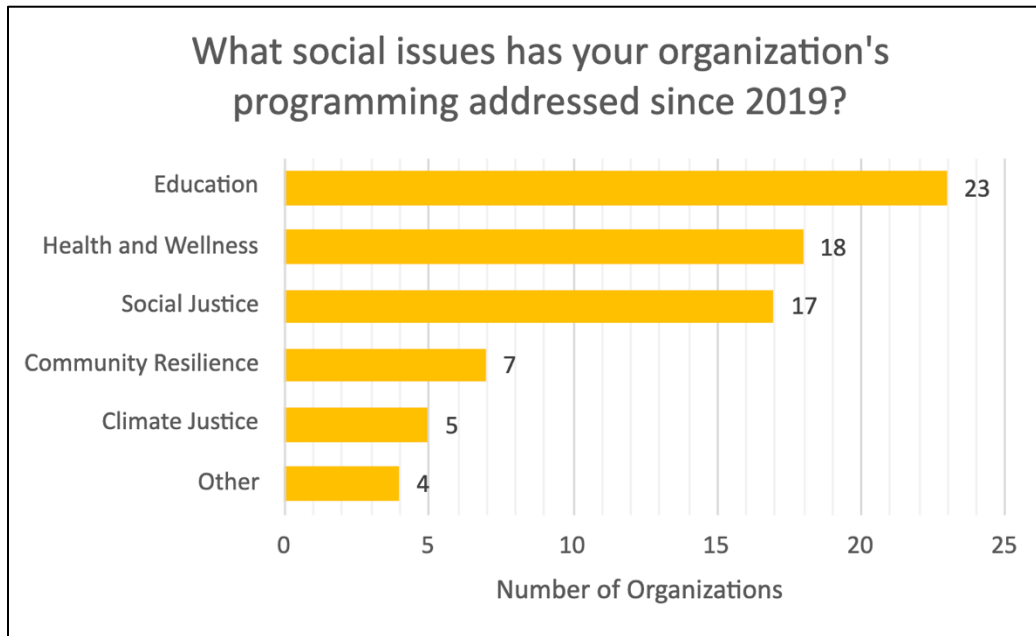
suggests a need to broaden engagement to ensure access to government initiatives and funding.

Collaboration within the Arts and Culture Sector

One of the overwhelming findings from our research was that Roanoke's arts and culture ecosystem values collaboration across the board. Of our survey respondents, 100% reported that they work with other arts and culture organizations. Of the organizations who participated in our listening sessions, all eight of them voiced an appreciation for the efforts that Roanoke Arts Commission and the Roanoke Cultural Endowment have made regarding the bi-monthly leadership roundtable. Six respondents were hopeful that the newly launched "[It's Here! Roanoke: Arts & Culture](#)" brand would have an impact on attendance and engagement numbers, with three people articulating the importance of the shared calendar.

While the organizations are appreciative of collaboration amongst the arts and culture organizations in Roanoke, many of our respondents have divergent views on how interconnected the arts ecosystem should be, as well as who should be in the room. Most listening session respondents affirmed that the new "It's Here! Roanoke Arts and Culture" shared brand is a comfortable level of collaboration. However, three respondents articulated concern about sustaining this brand equitably over time. Lastly, two listening session respondents articulated their concern over who was invited to participate in decision making for the arts and culture sector. The respondents called attention to the fact that there is little diversity in the executive roundtable meetings, especially regarding community member representation. Considering that over two thirds of survey respondents collaborate with community service organizations, this is an opportunity for the arts and culture ecosystem to be in more direct conversation with the community at a leadership level. Beyond these collaborations, 21 of the 27 survey respondents collaborated with educational institutions (K-12), and 14 with various communities or houses of faith or spirituality, indicating that the arts and culture are integrated into multiple spheres of influence for the Roanoke community.

Areas of Interest for Arts and Culture Sector in Roanoke Community



All Organizations Surveyed Partake in Educational Programming, and Educational Partnerships are Widespread.

Five of the eight organizations interviewed mention their educational practices, and when compared to the survey data, 100% of the organizations interviewed actively participate in and create programming focused on educational purposes. While only 15% of respondents listed their organization as one that primarily focused on Community and Education, 88% of survey respondents said that their organization programming has addressed education since 2019. Additionally, **92% of survey respondents said they have partnered with educational institutions.** This shows that educational services are a high priority for the arts and culture organizations of Roanoke. This aligns with how arts organizations are defined as educational institutions through the nonprofit sector.

“Everything that we do...it all really goes back to meeting the community where they are and helping them to learn, grow, and discover.”

Further, **30% of survey respondents list education as a mode of community engagement for their organizations.** Education is seen as a method to engage with the

city of Roanoke. These programs and resources reach a variety of demographics and encourage lifelong learning. Through educational programming, organizations and companies can support children’s aspirations for the future. While only 30% of arts and culture organizations explicitly state that they employed educational practices as a form of community engagement, it is probable that with further research focused specifically on arts organizations and their use of educational programs, this number will be significantly higher.

Individual and Community Health and Wellness Play a Significant Role Within the City of Roanoke Arts and Culture Ecosystem

“Art is the key. Art is medicine.”

Of our survey respondents, 18 out of 27 identified health and wellness as an integral element of their programming from 2019 to 2023. Of the eight organizations with which we conversed, five identified specific health and wellness initiatives incorporated into their programming and engagement. While health and wellness are not necessarily new initiatives within the ecosystem of Roanoke’s arts and culture organizations, it plays a significant role in the community as they actively integrate arts into mental and social health programming. Two respondents utilize dance, choreography, and different art modalities to support the well-being of patients, staff, and community. One organization implements music therapy programs—in partnership with a local rehabilitation center—providing therapeutic benefits in memory care, enhancing the quality of life for residents. Additionally—through another organization—special needs communities are engaged through accessible performances and collaborations. These wellness programs not only contribute to the mental and social health of individuals, but also foster a sense of community and inclusivity, demonstrating the profound impact of the arts on overall well-being.

“I do believe the arts are a healing practice.”

While most respondents surveyed and interviewed identified health and wellness as a significant piece of their programming and engagement, implementing these programs comes with several challenges:

- **Equitable Access:** Ensuring that wellness programs are accessible to all community members, including marginalized and economically disadvantaged groups, is a significant challenge. Organizations strive to create inclusive spaces but often face barriers related to outreach and engagement. One listening session respondent

pointed to the necessities of training for staff and leadership on trauma-informed care, conflict resolution, and fostering psychological safety.

- **Finances:** Securing consistent and adequate funding to support wellness programs is a major hurdle. Most organizations surveyed/interviewed rely heavily on grants and private donations, which can be unpredictable and competitive. The rising costs of operations further exacerbate this challenge. One source points to the tension between creating art for the people—particularly in the context of health and wellness programming—which may not always generate substantial revenue.
- **Staffing and Resources:** Finding and retaining qualified staff to run wellness programs was identified as difficult. Two of the eight organizations interviewed identified a need for personnel with specialized skills in both the arts and mental health, which can be hard to find and afford. Additionally, limited resources strain existing staff and can impact the quality and reach of programs.
- **Community Engagement:** Engaging the community and building trust, especially with groups that may not traditionally participate in arts programs, requires ongoing effort and innovative strategies. One respondent stressed the need to build trust and understanding between artists and both government and larger nonprofit organizations.

“When people left for COVID, there was an extended period before they came back. I think even now there's a mistrust of what officials were telling us. People were very confused.”

Social Justice is a Key Concern for Many Arts and Culture Organizations

Of the 27 survey respondents, 17 responded that their programming has addressed social justice issues in some way since 2019. For the sake of the survey, the themes and issues in this program area include inclusion, diversity, equity, and access, racial justice, religious freedom, LGBTQIA+ rights, women’s rights, veterans' affairs, indigenous rights and more. Beyond this, two respondents indicated that they were focused on cultural awareness. During each of our listening sessions diversity came up in some way, usually when speaking about diversifying audiences. For more information about engaging with underrepresented communities, see “Connecting with the Whole Roanoke Community” (Pg 25). As this research progresses, it may be helpful to collect more detailed information about what issues best align with the arts and culture organizations’ missions and how to leverage the strengths of the sector accordingly.

Breaking Boundaries: Arts and Culture Organizations are Expanding Audiences

Committed to the Current Audience, Aware of the Need for Adaptation

Our findings reveal a deep commitment among Roanoke arts and culture organizations to their community and recognition of the need to adapt for changing demographics and audience preferences.

Six of eight listening session respondents highlighted their organization’s service of the “Roanoke Community,” encompassing a diverse range of individuals and groups. Additionally, two of the eight respondents explicitly mentioned their focus on serving older adults. While this demographic plays a crucial role in supporting these organizations, it underscores the need to attract younger generations to ensure long-term audience development. Half of respondents specifically identified a desire to engage with younger audiences—including young professionals living and working in the City of Roanoke. One respondent reported success in expanding their reach beyond the local community—even attracting international audiences—through increased programming and presence on social media.



A word cloud demonstrating listening session respondents' answers to the questions "How would you describe your primary audience?"

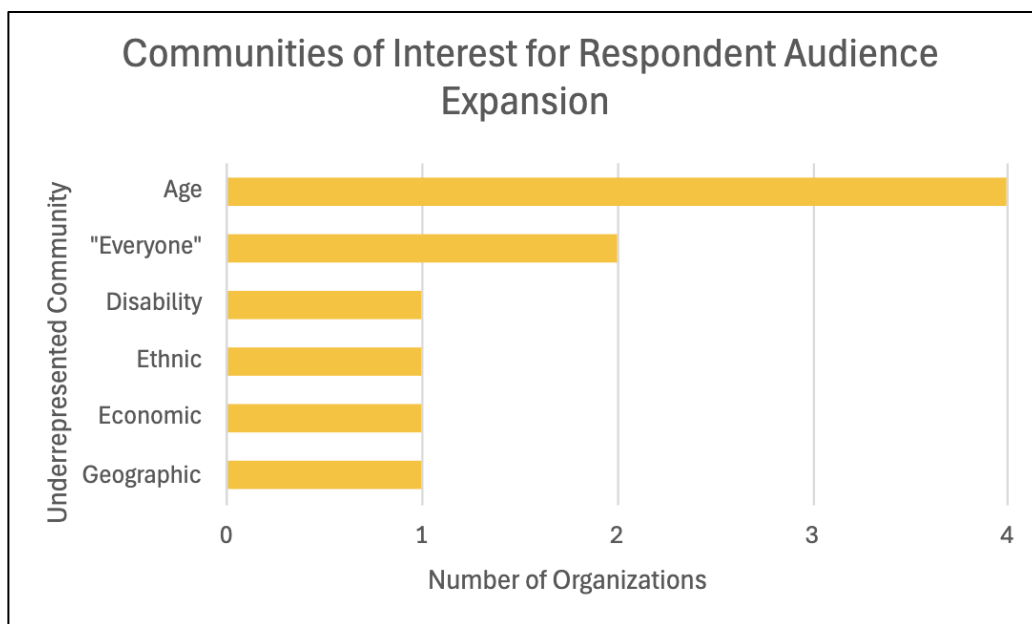
Two out of the eight respondents noted that their core audience demographics had not changed significantly since the pandemic. This suggests a degree of audience loyalty, with existing patrons returning to engage with these organizations. However, these organizations also acknowledge the need to expand their reach to new audiences. One of our respondents noted that post-COVID, both current audience members and new

members have been difficult to engage. Additionally, lack of programming and mission awareness was highlighted.

“If you were to look at any of our demographics and breakdown, the bread and the butter that kind of keep our doors open are the 60-plus year-old white women.”

Other strategies to diversify audiences include offering tailored programming and going into communities rather than simply inviting them. Attracting and retaining new audiences, particularly younger generations, remains a significant challenge. Financial constraints and difficulties appealing to diverse interests while maintaining core values contribute to this ongoing challenge.

Connecting with the Whole Roanoke Community: Certain Groups are Underrepresented in Arts and Culture



Throughout our conversations, it became clear that each organization had a different definition of who their “community” was. This extended into conversations about their intended impact, especially around the ideas of audience engagement and development. **When asked how they would like to expand their audiences, half of the listening session respondents included interest in increasing the age diversity of their audience**, specifically to include younger audiences. What was considered “younger audiences” varied slightly but mainly centered on professionals in their 30s and 40s and people with school-age children, as this group both satisfies the ticker-buyer demographic

and provides the opportunity to develop kids into future audience members. Two respondents stated interest in broadly expanding their audience without regard for specific underrepresented groups. This question does not account for two of the eight listening session respondents, who cited a belief that they are serving marginalized communities unrelated to audience expansion. One organization stated that they serve “marginalized” communities broadly, while the other specifically spoke to racial diversity.

Eight survey respondents, or just under 30%, qualify themselves as “culturally specific or BIPOC” organizations. As over 40% of Roanoke city identified as non-white, according to [2023 Census Bureau estimates](#), racial demographics are underrepresented within Roanoke arts and culture organizations based on our current data. When speaking about racial and ethnic diversity, only one organization articulated that they were interested in increasing their engagement with BIPOC communities in Roanoke City. Two respondents suggested that collaboration between arts and culture organizations may be a more successful way to engage Black and Hispanic community members. One respondent also suggested that larger, more stable respondents in the ecosystem could do a better job of including and supporting artists of color and “community-based artists” to increase racial and ethnic diversity within the arts and culture ecosystem.

“We've got to do more work as far as reaching out, going into their neighborhoods and their communities if we expect them to come through our door.”

Three respondents shared their theories on why audiences from minoritized communities, specifically BIPOC patrons, may not be engaging in or attending events. The first hypothesis is that there is a lack of awareness of what the respondents do and can provide to the community. The second mentioned that there may be a misalignment between the intended audience and programming. The third respondent believes that there may be a level of mistrust between the minority communities and arts and culture organizations around resources and visions for the future. Without data specifically from these communities, it is not possible to support or deny any of these claims. The “Suggested Further Lines of Inquiry” (Pg. 30) of this report describes how further research can be mounted to address some of this perceived misalignment.

Listening Session Respondents Enjoy Regional, National, and International Recognition

“Since COVID, we have seen our audience outside of the local area really just blossom.”

Several organizations welcome business nationally and internationally in addition to their local work. Half of the listening session respondents’ organizations welcome regional business and a quarter welcome international business (England, Japan, Italy). Arts and culture organizations have seen regional engagement with audiences, particularly from Abingdon and Blacksburg, and throughout Virginia. Half of the listening session respondents’ organizations receive business from national audience members. As such, these organizations’ reach varies, ranging from local to national and global patrons.

Arts and Culture Organizations Utilize a Variety of Strategies to Program for New Audiences

Five of eight listening session respondents mentioned making specific programming decisions to expand their community reach. Three of the eight respondents explained their process for making intentional decisions geared towards specific groups; “we also try to target specific demographics from time to time to make sure that we are reaching everybody... We like to say we meet the community where they are.” These directed efforts consider location, timing, and type of program for their intended community. The other two respondents describe creating programming with “something for everyone,” ensuring variety in every year’s programming.

“So therefore, we listen; and we listen with a big ear to be able to deliver what people are interested in seeing and what we know they’re going to come and experience. So, our relationship with our community is huge—it’s valuable. And we see that value.”

When looking at programming strategies, half of the respondents mentioned program quality as a driver of engagement. Furthermore, half of the organizations interviewed mentioned collaborating on programming as increasing their community reach. Speaking broadly, one representative explained, “if we are all together, we can do more... Community will come.” A representative from a different organization reflected a similar

idea based on collaborative experience, saying “You know there's that saying, if you want to go far, go by yourself, but if you want to go farther, go with your friends. So, you know, in turn, we promote each other's programs. And it gets a wider audience, an audience that wouldn't even come to the [other institution], and suddenly, they come to our event.”

Resilience and Recovery in a Peer City

When researching peer cities, the team specifically looked for initiatives started or expanded in response to the COVID-19 pandemic. This research lens led us to two cities: Greenville, South Carolina, and Dubuque, Iowa. This is not to say that other peer cities' initiatives do not adequately support their arts and culture ecosystems; rather, their programs did not align with the intentions of this project.

Greenville, South Carolina

[The Metropolitan Arts Council](#) (MAC) of Greenville, South Carolina has supported and continues to support their arts community through a variety of initiatives:

- [The Art Card](#) is a donation strategy employed to raise funds for the arts organizations of Greenville, South Carolina. By donating \$50 or more to MAC, donors receive a buy-one-get-one free ticket redeemable at one of their seven partner organizations.
- [Strong Community Support](#)- In 2022, The Metropolitan Arts council celebrated its most financially successful year since its founding in 1973 due to their high earnings, donations, and community investment in their work.
- In 2020 [The Metropolitan Arts Council](#) partnered with the Graham Foundation, Hollingsworth Funds, the Community Foundation of Greenville, and the Canal Charitable Foundation to provide **\$541,700** in COVID-19 relief funds to 31 arts organizations.
- [The MAC Grants Program](#) – In 2009, The Metropolitan Arts Council instituted its Endowment for the Arts. Its purpose is to fund grants for artists, arts education programs, and arts organizations in Greenville County.

Dubuque, Iowa

The [Arts and Cultural Affairs Advisory Commission](#) of Dubuque, Iowa has taken several significant steps to support and revitalize the arts and culture sector in response to the challenges posed by the COVID-19 pandemic. Some key initiatives include:

- [Creative Resiliency Grants](#)—created in response to COVID-19 and inequity concerns— offer limited, flexible support to arts, humanities, and cultural nonprofit organizations impacted by the pandemic. With awards ranging from \$750 to \$1,500, these grants provide financial assistance to organizations with the intention of grant recipients undertaking activities that expand organizational capacity, help sustain operations, promote equity and inclusion, and adapt to new modes of programmatic offerings in response to COVID-19.

- To adapt to social distancing measures, many cultural events and festivals transitioned to virtual and hybrid formats. During the COVID-19 pandemic, [DubuqueFest](#) transitioned to a virtual format in 2020 and adopted a hybrid model in 2021. This adaptation not only ensured community access to this event but also expanded its reach and inclusivity. By leveraging digital platforms, the festival maintained its role as a vital cultural event in Dubuque, supporting local artists and engaging the community in innovative ways.
- [Art on the River](#) is a public art exhibit initially approved for creation by the City Council in November 2005 and since has accumulated community-wide support and national recognition from the arts and tourism businesses. During the pandemic, it was identified and added as a high priority in the City Council's 2020-2022 policy agenda and implemented as a permanent part of the City's Office of Cultural Affairs operating budget. Occurring annually, this exhibit is free to the public and offers educational opportunities through informational pamphlets and gives talented artists the necessary exposure.

Suggested Further Lines of Inquiry

Ticketing and Attendance Data, 2019-now

Due to the time limitations of Phase I of this survey, we could not collect real ticketing and attendance data to support or augment the perception-based data provided in the survey. The PA CultureCheck team was able to secure more specific actual figures, which were then tracked over time, creating a longitudinal study of ticketing and attendance trends. We believe that the comparison of real data and the current perceptions shared in this survey would create a detailed picture of how the COVID-19 pandemic affected the ecosystem and the real changes between each stage of recovery. Doing so may also allow us to pinpoint strategies that have worked for individual arts organizations, thus allowing for some idea sharing within the ecosystem.

Community Perceptions of Arts and Culture Organizations

While this research focused on organizations and their perceptions of their relationship with the City of Roanoke community, further inquiry into the public's perception of arts and culture organizations would clarify how each entity views the other. This information would help ensure that the connection felt by Roanoke arts and culture organizations is reciprocated or, if not, may guide these organizations towards engaging more meaningfully with their community members.

Funding Composition: Earned versus Contributed, 2019-now

Similarly to the desire to create a longitudinal study regarding the ticketing and attendance data, the research team is interested in collecting data regarding the funding composition for organizations in Roanoke. More holistic research would look at factors like revenue through memberships/subscriptions versus single-ticket sales, individual and corporate sponsorships versus national, state, and local government grants, and overall levels of endowment funds across the ecosystem. Based on findings regarding the fiscal health of the sector, knowing true figures and their relationship to organizational budgets would prove valuable information to consider how the Roanoke Arts Commission and the Roanoke Cultural Endowment can support the sustainability of the sector over time.

Expansion of inquiry to individual artists

In contrast with larger organizations, artists - many of whom are independent contractors - have vastly different experiences and needs than established institutions. A similar survey and listening session process could uncover trends in income, job stability, emotional and physical wellbeing, and engagement with the Roanoke population and government from

pre-pandemic to present day. Our team recommends a digital survey be distributed and listening sessions to be conducted with this population.

Inclusive Analysis of Arts and Culture Ecosystem

Our research, given the project's limited schedule, focused primarily on the 33 organizations with which Roanoke Arts Commission and the Roanoke Cultural Endowment already had existing relationships. Future research is necessary to establish a more holistic idea of the arts and culture ecosystem in Roanoke post 2019. To do so, we recommend that researchers solicit a larger sample size of organizations, such as arts-producing religious entities, floral shops, libraries, independent artists, and artists partnered with organizations.

CultureCheck Roanoke

About PA CultureCheck

PA CultureCheck is a study conducted by PA Humanities and the Greater Philadelphia Cultural Alliance to gather the voices of Pennsylvania’s cultural, arts, and humanities organizations, along with other nonprofits and community groups. The study aims to track post-pandemic recovery and regrowth and to explore how organizations are engaging with their communities. The results from surveys and virtual listening sessions inform local and statewide advocacy efforts, educate grant makers and practitioners about the latest trends, inspire future research, and help build a stronger and more responsive cultural community.

About The Roanoke Arts Commission

The [Roanoke Arts Commission](#) increases the collective impact of arts and culture in the community by:

- Advocating for arts and cultural initiatives and investment,
- Developing and Implementing the City’s Public Art Plan,
- Advancing the City’s Arts and Cultural Plan, and
- Guiding City investments in arts and culture.

About The Roanoke Cultural Endowment

The [Roanoke Cultural Endowment](#) is a non-profit community endowment formed in January 2015 by resolution from Roanoke City Council as a private-public fund comprised of both city dollars and private dollars. Their vision is to foster a vibrant community where arts and culture are accessible to all and valued as a critical component of a healthy economy and region, today and for future generations. The goal is to raise \$20 million through public and private contributions. The endowment will award grants to arts & cultural organizations once the endowment reaches \$20 million. Fundraising will continue perpetually.

About The Virginia Tech M.F.A. in Arts Leadership

The M.F.A. in Arts Leadership program is a member of the Association of Arts Administration Educators. Critical thinking, creative problem-solving, and bold experimentation form the core of our arts leadership program. We combine coursework with hands-on learning to provide a theoretical framework and practical experience in arts

management and advocacy to prepare students for the demands of today's leadership roles in the arts.

About the Researchers

Ashley Cooper, Project Lead and Lead Coordinator

Ashley Cooper (she/her) is a second-year Theatre-Arts Leadership MFA candidate from Gaffney, South Carolina. Graduating with a B.A. in Performing Arts - Theater from Clemson University, Ashley has worked to support teaching, technical, and performance artists with logistical, financial, and community support and has seen the challenges the industry faces at a community and regional level. Having held positions such as Assistant Company Manager (Utah Shakespeare Festival) and Operations Coordinator (Brooks Center for the Performing Arts), she is excited to pursue solutions to the financial and cultural issues facing industry professionals to maintain the viability of our industry. Ashley is excited to focus her research on non-profit funding models, sustainable business practices for the entertainment sector and the vital role arts and community organizations play in public revitalization.

Bria Weisz, Project Manager

Bria Weisz (they/her) is a first year Theatre-Arts Leadership MFA candidate from Boca Raton, Florida. Bria is a Rice University graduate with a BA in Computer Science in the Arts and a minor in Museum Studies and Cultural Heritage. Before starting graduate studies, they held curatorial positions at the Museum of Fine Arts, Houston, and the University of Minnesota's Weisman Art Museum. Within the theatre world, they have served as an assistant director, dramaturg, and community engagement specialist at Theatre in the Round Players in Minneapolis. Bria is passionate about fostering sustainable and accessible creative spaces for artists and audiences alike. Their computer science background informs their interest in technology as a projection and assessment tool. With technology as a grounding force, they aspire to bolster community-mobilizing artistic endeavors.

Kasey Socks, Lead Researcher

Kasey Socks (she/her) is the Assistant Director of Leadership Gifts at the Moss Arts Center pursuing the Arts Leadership Certificate at Virginia Tech. Originally from Chester, Virginia, Kasey has been part of the Moss Arts Center team since 2019, starting as a student in Patron Services and later as Assistant House Manager. She received her B.S. in Human Development, as well as a minor in music, from Virginia Tech. Kasey has professional experience in human services, fundraising and development, memory care, program

planning, ministry work, music, and childcare. She is most passionate about arts advocacy in unreached communities and therapeutic arts programs/interventions. Growing up surrounded by the arts enriched her life and continues to enrich her life as she works with others to make the arts more accessible in our communities.

Caili Harris, Client Relationship Manager

Caili Harris (she/her) is a first-year Theatre-Arts Leadership MFA candidate from Lexington, Kentucky. She holds a B.A. in Theatre and French Language Studies from Centre College. Caili's notable experience includes organizing a fundraiser reading of *Dry Land* by Ruby Rae Spiegel for the Kentucky Health Justice Network's abortion support fund, writing her original play, *Spilled Pop and the Dimensions of a Happy Place*, performed at Centre College and the SETC Fringe Festival in 2023, her recognition as an Undergraduate Emerging Scholar by the Mid America Theatre Conference, and her observer ship with Exchange Theatre, a London, England based francophone theatre, where she expanded the theatre's network and curated new materials for their social media. Caili is excited to focus her research on francophone theatre, aiming to create, maintain, and support francophone dramatic arts spaces in the United States and abroad.

Appendix A: Survey Questions Posed

1. Organization Name
2. Organization Type
3. Your name
4. Your role in organization
5. How does your organization measure engagement?
6. How was engagement in 2023 compared to 2019?
 - a. When do you expect engagement to return to 2019 levels?
7. Through which of the following do you deliver programming?
8. Which of the following modes of communication do you currently employ in your marketing strategy?
9. How has hiring been for your organization since 2019?
10. What percent of your paid staff have you retained from 2019 to 2023?
11. How many more volunteers did your organization have in 2023 compared to 2019?
12. Does your organization partner with any of the following organization types?
13. What social issues has your organization's programming addressed since 2019?
14. What was your organization's annual budget in 2019?
15. What was your organization's annual budget in 2023?
16. How many paid staff does your organization have?
17. Is your organization considered a culturally specific or BIPOC organization?
18. Is there anything not covered on this survey that you perceive as a challenge for your organization since 2020?
19. Is there anything not covered on this survey that you have viewed as successful for your organization since 2020?

Appendix B: Listening Session Questions Posed

1. What is the community impact of your work?
2. Who would you describe as your primary audience? Has this changed in the last five years?
3. What has the trend in audience return been like?
4. Is there an audience or community you would like to engage more with?
5. How do you feel about your relationship with the Roanoke community, including those who currently are and are not attending your programming?
6. How do you feel about your relationship with the City of Roanoke government?
7. How might Roanoke arts and cultural ecosystem support you now?
8. What are your biggest challenges right now?
9. In this respect, how have you seen your organization succeed in the past five years?
10. Through what criteria do you measure success?
11. How do you as an organization hope to grow in the next five years?
12. What have you learned about your organization's role in the arts ecology of Roanoke in the past five years?

Thank you to the organizations and individuals who made the success of Phase 1 possible! Keep a look out for future phases. We hope our effort provides fruitful information and insights for your organizations and their missions.

Sincerely,

Ashley, Kasey, Bria, and Caili

