

# The Market Intelligence Dashboard

## TRAINING WORKBOOK

**FOUR**  
EXERCISES

The Market Intelligence Dashboard (MID) provides data about demographic information and predicted ticket purchases at the neighborhood level to help you plan more impactful outreach campaigns, make informed ticketing and venue decisions, and evaluate your marketing and outreach efforts.

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# INTRODUCTION

Developed by [SMU DataArts](#), the Market Intelligence Dashboard (MID) is an easy-to-understand, interactive statistical dashboard that provides valuable insights into ticket purchasing habits and demographics of the surrounding neighborhoods of arts organizations.

In early 2023, we partnered with ArtsKC to produce a dashboard for Kansas City, which has now been made available to organizations across the city. In this workbook, you'll learn how to navigate the tool as well as foundational use-concepts that can be implemented in future marketing campaigns.

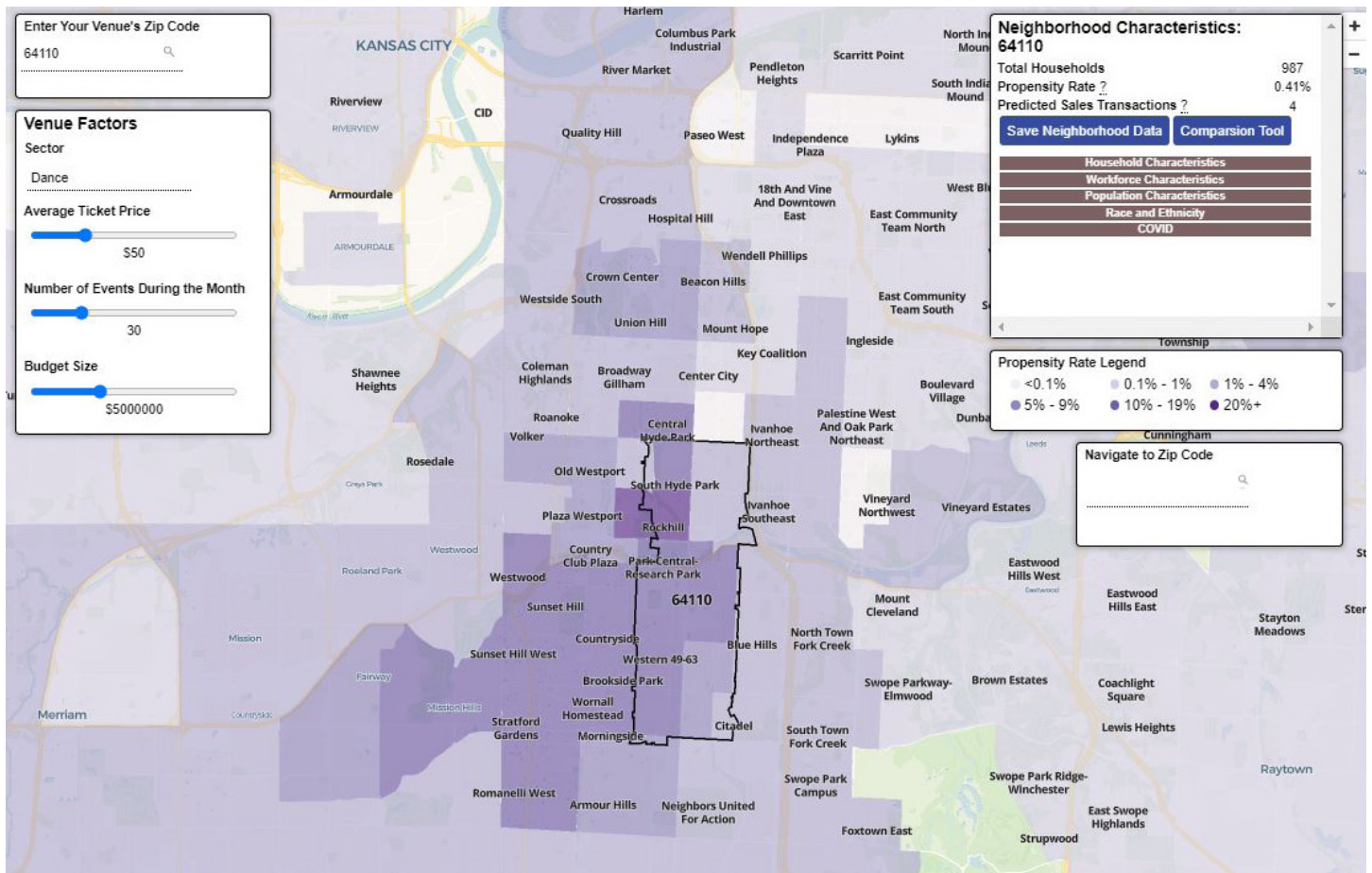
## BEFORE YOU BEGIN

Go to [bit.ly/KansasCityMID](https://bit.ly/KansasCityMID) to open the dashboard on your computer and watch our short introductory tutorial on Vimeo at [bit.ly/MIDIntroduction](https://bit.ly/MIDIntroduction).

## KEY TERMS & DEFINITIONS:

*Demographics:* the characteristics of residents of a neighborhood, including income, race and ethnicity, age, and more.

*Propensity rate:* The likelihood that a household in given a geographic area will make a purchase at your organization.



# EXERCISE 1: EXPLORE THE MID

Follow the steps below to get oriented to the different data points available within the dashboard.

## STEP 1

Enter your organizational characteristics into the MID.

- a) In the top left corner, enter your venue's zip code and hit return.
- b) Under Venue Factors, set each factor to match your organization's information.

## STEP 2

Select a neighborhood near your venue.

- a) Look for your venue's zip code, outlined in black on the map.
- b) Click on an area of the map near your venue to select a neighborhood. The selected neighborhood will be outlined in purple.
  - i) Note: Neighborhoods in the MID are census tracts, which are usually smaller than a zip code.

## STEP 3

Use the Neighborhood Characteristics box on the top right to view data for that neighborhood.

- a) Propensity rate is the likelihood that a household in that neighborhood will make a purchase at your organization. Predicted sales transactions is calculated based on propensity rate and the total households. These numbers are determined by the organizational characteristics you entered in the first step.
- b) Select 'Household Characteristics' to view demographic data from the census containing several categories – read through each section.

## STEP 4

Identify neighborhoods with high ticket-buying propensity rates, which are shown in shades of purple (refer to the Propensity Rate Legend on the map for more clarification).

- a) Click on one of the high propensity rate neighborhoods and read through its data.

## STEP 5

Alternatively, examine data of specific zip codes.

- a) Use the Navigate to Zip Code feature on the right side of the map to enter a zip code. (Try your home zip code or another you are familiar with). The map will zoom to that zip code.
- b) View the data for a few neighborhoods within that zip code.

### *Exercise 1*

#### **REFLECTION QUESTIONS:**

*Grab a pen and paper and write down your initial thoughts, or hold a discussion with your team.*

- What did you notice about the neighborhoods surrounding your venue?
- What did you learn about the neighborhoods with a higher propensity?
- What surprised you? What was as you expected?

# EXERCISE 2: DEVELOPING TARGETED OUTREACH CAMPAIGNS

For this exercise, you'll need access to Excel, Google Sheets, or another program that can open a CSV file. Start by writing down a specific outreach goal. (If you don't have a specific goal in mind, use an example below).

Examples:

- Attract more low and middle-income attendees to your fall season.
- Invite more Black residents to your programming to increase their representation in your audience.

Next, follow the next steps to identify zip codes that could be relevant to your goal, then download them to sort and compare. Follow our video demonstration to help you get started at [bit.ly/MIDTargetedOutreach](http://bit.ly/MIDTargetedOutreach).

## STEP 1

Enter your organizational characteristics on the left, including your Venue Zip Code and Venue Factors.

## STEP 2

Select neighborhoods that you would like to explore.

- a) Examine the demographic data for each neighborhood to see if they align with outreach goals.
- b) Here are a few examples of the types of neighborhoods you might explore:
  - i) Neighborhoods immediately surrounding your venue. (The venue zip code is outlined in black).
  - ii) Neighborhoods with higher propensity rates. (They will be shaded a darker purple).
  - iii) Neighborhoods you are already considering for outreach, such as any neighborhoods near a potential co-producer's location.

## STEP 3

Add promising neighborhoods to your saved list.

- a) With the neighborhood selected, click 'Save Neighborhood' under the Neighborhood Characteristics box. You can add as many neighborhoods as you like to your list.

## STEP 4

Download the csv file and open it in excel or another compatible program.

- a) Click the 'comparison' tool button under the Neighborhood Characteristics box, then click the 'download' button.
- b) A CSV file will download to your computer. Locate it on your computer and open it. This file will open in Excel, Google Sheets, or another spreadsheet software.

## STEP 5

Use Excel or another program to explore the data.

- a) Here are some suggestions to get you started
  - i) Sort the sheet by a few criteria to see what zip codes rise to the top.
  - ii) Use conditional formatting to visually identify data with demographic characteristics that match your outreach goals.

## Exercise 2

### REFLECTION QUESTIONS:

- If you are developing a locally targeted marketing campaign to accomplish your goal – which neighborhoods from your list would you prioritize?

*Consider choosing zip codes that meet your goals in terms of demographics, but also have relatively high propensity rates.*

- Brainstorm a few methods you might use to reach people in those neighborhoods.

*Ideas to get you started: place flyers at local businesses, targeted mailings, partner with local media, local social media groups, and other neighborhood organizations.*

*Remember that the neighborhoods in the MID are tied to Census tracts. If you need to use zip codes for your outreach (for example for a direct mailing) you can access the zip codes associated with each census tract in the data download.*

- Look at the propensity rates in those neighborhoods, as well as the expected ticket buyers, and set a realistic goal for your campaign.

*Example: When engaging a community for the first time, a realistic goal might be something only slightly higher than the predicted buyers.*

*If you have existing relationships in those communities, you might set a higher goal.*

## EXERCISE 3: KNOW YOUR EXISTING AUDIENCES

In this exercise, you will use the MID to learn more about the neighborhoods where your existing audience members reside.

To complete this exercise, you will need a list of addresses or zip codes for your patrons, which you will then analyze to determine the most frequently occurring zip codes.

### STEP 1

Determine the top 5-10 zip codes your audience comes from using excel or another tool.

*Hint: You can identify your top zip codes using a pivot table in excel. Use the help material within excel or online resources to help you do this.*

### STEP 2

Enter your organizational characteristics on the left, including your Venue Zip Code and Venue Factors.

### STEP 3

Navigate to the zip codes on your list and explore the data for each.

- a) Enter each zip code under Navigate to a Zip Code on the right side of the map and hit return.
- b) View the data for a few neighborhoods (e.g. census tracts) within that zip code.

# EXERCISE 3: KNOW YOUR EXISTING AUDIENCES (CONT'D)

## STEP 4

Save the data and download it.

- a) Select neighborhoods that overlap with your top zip codes, then click 'Save Neighborhood Data.'
- b) When you have saved all the neighborhoods within your top zip codes, click 'Comparison Tool,' and download the data.

## STEP 5

Examine the demographics across these neighborhoods – are there any commonalities or differences?

- a) You can use the data file or the MID itself, or switch back and forth.

## STEP 6

Examine the propensity rates within these zip codes - are they high or low compared to other areas on the map?

- a) You can use the data file or the MID itself, or switch back and forth.

## STEP 7

Return to the MID and examine the entire map.

- a) Are there neighborhoods with a high propensity (darker purple) that are not in your top zip codes?

### Exercise 3

#### REFLECTION QUESTIONS:

- What are the commonalities among the neighborhoods in your top zip codes? Are there any zip codes that look different than the others or are they all similar? Is there anything that stands out as surprising?
- Do any neighborhoods within your top zip codes have a relatively low propensity according to the map? If yes – why do you think that could be? And, does your organization have a connection to that neighborhood?

*Hint: brainstorm with other staff if you are unsure about your connection to specific neighborhoods.*

*Remember that the propensity data within the MID is based on a model of attendance at arts organizations across the country. The predictions are tailored to your organization based on the venue factors you enter, but do not capture or predict the effects of other factors or unique outreach efforts by your organization. Differences between the propensity numbers in the map and your results can help you understand your unique strengths.*

- Are there any high-propensity zip codes that are not in your top 10? Consider if you should be marketing there.
- Finally, are there neighborhoods you want to be serving but aren't? What can you learn about those neighborhoods through this data?

# EXERCISE 4: EXPLORE DIFFERENT NEIGHBORHOODS AND NEW VENUES

In this exercise, you will investigate a venue you have not yet performed at and evaluate how attendance patterns might be different than your usual venue.

Before you begin, determine which venue you will research. If you have a program planned at another venue you can use that. Otherwise, choose a venue that you are considering performing at in the future.

Write down some goals for performing at this new venue. Here are two examples:

- We hope to reach audiences within the immediate neighborhood of the venue.
- We hope to reach new audiences across the city and increase visibility by performing at a bigger venue than usual.

## STEP 1

Enter your organizational characteristics on the left. Make sure to include the zip code for your new venue, as well your other Venue Factors.

## STEP 2

Enter your new venue zip code under Navigate to a Zip code to the right of the map and hit return.

## STEP 3

Examine data of neighborhoods around your venue.

- a) Select each neighborhood then view the data in the Neighborhood Characteristics box.
- b) You can also add these neighborhoods to your saved list for export later.

## STEP 4

Zoom out to look at the entire map, and identify at least 3 neighborhoods with high propensity rates. Examine those neighborhoods more closely using the Neighborhood Characteristics box, or download their data.

### Exercise 4

#### REFLECTION QUESTIONS:

- Based on your goals and the information from the MID; write down a few ideas for how to promote your program at the new venue.

*Examples: If your goal is to engage with the immediate neighborhood, think about census tracts you might focus on for hyper-local marketing efforts. The demographics of each neighborhood might help you develop campaigns that speak to the residents.*

*If the goal is to gain visibility across the city by performing at a new venue, that might lead to brainstorm ways to target census tracts located anywhere with a higher ticket buying propensity than that of your regular venue.*

- Look at the propensity rates in those neighborhoods, as well as the expected ticket buyers, and set a realistic goal for your campaign.

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At KC Melting Pot Theatre, we have a very diverse audience with the greatest population from the Black community. We needed data-driven insights to understand what part of the city patrons were coming from to develop a marketing strategy that maximized our limited marketing funds.

With the introduction to the MID, we've gained the ability to analyze zip code demographics, identify similar neighborhoods, assess potential ticket sales, gauge income levels, gauge how far people are likely to travel and pinpoint effective advertising outlets. This has allowed us to craft a targeted marketing strategy, which we continue to build based on the information we can now access through the MID.

Linda Williams  
ArtsKC and KC Melting Pot Theatre



# FAQs:

## WHAT DATA IS USED IN THE MID?

The two main data sources used in the MID are the US Census, and [TRG Arts' Arts & Culture Benchmark](#). The US Census is the source of all demographic data within the MID. The Arts & Culture Benchmark is a free tool provided by TRG Arts and Purple Seven which enables arts and cultural organizations to benchmark their ticketing data against peers. Our researchers also use other data including COVID case rates and vaccination rates to better model and predict ticket sales.

## WHAT ARE PROPENSITY RATES BASED ON?

The propensity rates are based on work from the SMU DataArts research team to model the factors that drive arts participation. This encompasses work dating back to 2017 about [the effects of distance on arts participation](#), as well as efforts to [model and predict ticket sales during COVID-19 shutdowns and re-opening](#). The propensity rates are predictions based on what we know about the drivers of arts attendance and the available data, they are not set in stone. The predictions reflect typical attendance patterns for organizations matching the venue factors entered into the MID. They will not reflect your unique relationship with your local community and or your specific outreach efforts.

## DOES THE MID USE ZIP CODES OR CENSUS TRACTS?

The MID primarily presents data by census tract, which is small geographical area designated by the US Census for the purpose of collecting census data. Any reference to a neighborhood within the MID or this document is referring to a census tract. Census Tracts are typically smaller than zip codes, which allow MID users a more granular look at their neighborhoods.

Since users are likely to encounter zip codes in other contexts (e.g. the household address of an attendee or when planning direct mail marketing campaigns) the MID does provide the zip code that each census tract falls within. This information can be accessed at the top of the neighborhood characteristics box or within the data download.

Note that census tracts can sometimes fall within multiple zip codes. In this case the zip code that contains the largest portion of the tract will be referenced in the MID.

# SMU DataArts

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[smu.edu/dataarts](https://smu.edu/dataarts)



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