Awareness, Attitudes & Usage Study
2018 Baseline Wave

Étude sur la Notoriété de la Marque:
L’Alliance Française de Chicago.
Background information

Last year’s presentation:

- Summarized about 4 years of research:
  - Student satisfaction surveys.
  - Focus groups: web site & brochure.
  - Simmons data: activity profiles for target consumers.
  - Student engagement survey.

- Results:
  - New, smaller brochure
  - New, responsive website
  - Advertising on public transportation (CTA Red Line)
  - Advertising on the building
  - Importance of cell phones!
Where we are today:
The new responsive AF-Chicago website

Bienvenue à l’Alliance Française de Chicago, home for all things French, for all Chicago!

What’s New

Cooking workshop - No-Knead Bread and More
Saturday, January 27, 2018 at 11:15 am
Mix the dough, let it rise, refrigerate it and bake it when you’re ready. Recipes include a French boule master recipe, cranberry walnut bread and challah. While the bread
This year…

AA&U Study - measures:
- Brand awareness.
- Attitudes about the brand.
- Usage (patronage).

Purpose:
- Assess effectiveness of marketing campaign (over time)…
- Increase brand awareness?
- Improve attitudes & usage?

Frequency:
- Usually once a year;
- More often if there is a major expenditure in marketing.
Survey sample characteristics

Our sample composition:

- 999 respondents
- Residents of “Greater Chicago Metro Area”
  - Counties immediately surrounding Chicago & Cook County.
  - Including Lake & Porter in NW Indiana.
  - Excluding Lake and Grundy in IL.
- Roughly even balance of men and women.
- Age range: 25-75.
- Education: HS Diploma +
- Income: $50k+ annual HHI.
Why the large sample?

999 Respondents…

- We anticipated that our target group would be small.
- Need a large sample to find them in sufficient numbers to obtain reliable descriptive statistics.
Brand Awareness – Notoriété de la Marque

- Unaided Brand Awareness
- Aided Brand Awareness
Why is “unaided brand awareness” important?

Direct correlation with market dominance

- “Unaided brand awareness” is the key predictor of market dominance.
- The top three brands in almost any category are those that are recalled immediately and spontaneously by the members of the target audience.
  - “Thinking of laundry detergents, what brands come to mind…?”
  - “Thinking of pain relievers, what brands come to mind…?”
  - “Thinking of European luxury automobiles, what brands come to mind…?”
- The first brand recalled is almost always the leading brand in the category.
What about “aided brand” awareness?

Essential for gaining consideration

- High “aided brand awareness” is essential for low-involvement categories.
  - The target customer may not have “top-of-mind” awareness of brands in the category.
  - When there is no clear list of “top brands” or obvious choices, the target consumer will search for information.
  - It is essential that they have at least heard of us when they conduct that search.
The two “awareness” questions…

Unaided brand awareness

- “Thinking of foreign language and cultural centers in the greater Chicago area, what are the first brands, organizations or institutions that come to mind?”

- “You can enter the names of up to five organizations.”
The two “awareness” questions…

Aided brand awareness

- Listed below are some of the foreign language and culture centers in the greater Chicago area.

- Please indicate which organizations you are aware of by checking the appropriate box.

- By “aware” we mean that you have heard of the organization before now and that you know something about the programs that it offers.
Very low unaided awareness for all foreign language & cultural centers in Chicago

Unaided Awareness - First Mention:
Language & Cultural Organizations in Chicago

Thinking of foreign language and cultural centers in the greater Chicago area, what are the first brands, organizations or institutions that come to mind?

(First mention)
After five opportunities, only 3% of the Chicagoland adult population mentions the AF-C.

Thinking of foreign language and cultural centers in the greater Chicago area, what are the first brands, organizations or institutions that come to mind?

(All five possible mentions)
Aided awareness:
Language & Culture Organizations Listed

- Goethe Institute Chicago
- Instituto Cervantes Chicago
- Chicago Mandarin Chinese Center
- ItalCultura at the Italian Cultural Institute
- International Language Institute*
- Académie Française*
- Spanish Language Centers
- Alliance Française de Chicago
- Language Loop
- L’École Française
- Universidad Nationale Autonoma de Mexico (UNAM)
- Say It in Hebrew!
- Elena Chicago
- I am not aware of any of these organizations.

*Made-up names
Listed below are some of the foreign language and cultural centers in the greater Chicago Area. Please indicate which organizations you are aware of by checking the appropriate box. By “aware” we mean that you have heard of the organization before and that you know something about the programs that it offers.
Conclusions: low involvement, low awareness

Unaided brand awareness

- Respondents had difficulty recalling any of the foreign language training & cultural center in Chicago.

- The AF-C was mentioned first by less than 2% of the adult population.

- Even with five opportunities to do so, only 3% of the population in the greater Chicago area mentioned the AF-C.
Conclusions: low involvement, low awareness

Aided brand awareness

- Nearly 60% didn’t recognize any of the organizations in the list.
- Generic sounding names and names that include “Chicago” did the best in the list.
- “Aided” brand awareness of the AF-C is about 11%.
- …but the “International Language Institute” was selected by nearly 14% of the adult population!
- A very “low involvement” category.
Conclusion…

A very sleepy category:

- None of the top organizations, including the AF-C, are “making any noise” – breaking through to gain attention.

- Big opportunity to shake of the category,

- But probably an expensive proposition.
Attitudes:

How do aware respondents characterize the Alliance Française de Chicago?

- Personality Profile
- Ratings
Personality attribute checklist

How do they see us?

- Personality profile checklist is a quick way to get at basic perceptions.

- Two-step process:
  - Reconfirm awareness of the AF-C
  - Ask that respondents check all the adjectives that apply.

- Comparative ratings:
  - Instituto Cervantes
  - Alliance Française de Chicago

<table>
<thead>
<tr>
<th>Adjectives:</th>
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<tr>
<td>Charming</td>
<td>Challenging</td>
</tr>
<tr>
<td>Innovative</td>
<td>Arrogant</td>
</tr>
<tr>
<td>Unique</td>
<td>Boring</td>
</tr>
<tr>
<td>Inspiring</td>
<td>Cold</td>
</tr>
<tr>
<td>Entertaining</td>
<td>Demanding</td>
</tr>
<tr>
<td>Fun</td>
<td>Tedious</td>
</tr>
<tr>
<td>Professional</td>
<td>Out-of-date</td>
</tr>
<tr>
<td>Helpful</td>
<td>Unapproachable</td>
</tr>
<tr>
<td>Thoughtful</td>
<td></td>
</tr>
</tbody>
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AF-C Strengths v. Instituto Cervantes
Entertaining, Charming, Challenging, Demanding

Personality Attribute Profile
(Cervantes: n = 464; AF-C: n = 509)

- Unique
- Professional
- Helpful
- Entertaining
- Inspiring
- Fun
- Innovative
- Thoughtful
- Charming
- Challenging
- Demanding
- Cold
- Tedious
- Arrogant
- Boring
- Unapproachable
- Out of Date

AF-C
Cervantes

0% 10% 20% 30% 40% 50% 60%
Instituto Cervantes Strengths v. AF-C:
Professional, Helpful, Inspiring, Innovative

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- Boring
- Unapproachable
- Out of Date

AF-C blue, Cervantes red

0% 10% 20% 30% 40% 50% 60%
Rating the Alliance Française de Chicago:
Our ratings improve with increased visits

Rating by Frequency of Visit
(n = 162 - Have visited AF-C 1 + times)

<table>
<thead>
<tr>
<th>Frequency of Visits to the Alliance Française</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>+1/month</td>
<td>9.3</td>
</tr>
<tr>
<td>1/month</td>
<td>8.0</td>
</tr>
<tr>
<td>5-6/year</td>
<td>7.9</td>
</tr>
<tr>
<td>3-4/year</td>
<td>7.3</td>
</tr>
<tr>
<td>1-2/year</td>
<td>7.0</td>
</tr>
<tr>
<td>Total</td>
<td>7.5</td>
</tr>
</tbody>
</table>

10-point Rating Scale
Usage – How does patronage of the AF-C compare with peer organizations?

- Frequency of attending events at peer organizations
- Frequency of patronizing Chicago’s top cultural organizations
How often do residents of the greater Chicago area visit a language training & cultural center?

Question:

“Please indicate how often you have attended events at each of the following organizations. By events I mean things like: a lecture, a symposium, a film, a cooking demonstration, a book signing, an art exhibit, a wine tasting or an open-house?”

Organizations:

- Instituto Cervantes Chicago
- ItalCultura at the Italian Cultural Institute
- Universidad Nacional Autonoma de Mexico (UNAM)
- L’École Française
- Goethe Institute Chicago
- Alliance Française de Chicago.
Even among “aware” respondents, attendance is rare...

Among those aware of foreign language & cultural centers, only half ever attend
(Aware of any center - n = 417)

- Never
- Infrequently
- Occasionally
- Often

- Attend “Often”
  - 16%

- Never Attend Any
  - 50%

- Infrequently
  - 19%

- Occasionally
  - 15%
… but the AF-C is doing relatively well compared to it’s peers.
Patronage of Chicago Cultural Organizations

Key question:

- How does attendance at AF-C events compare with attendance at Chicago’s top cultural organizations?

Cultural Organizations:

- The Lyric Opera
- The Chicago Symphony Orchestra
- The Chicago Shakespeare Theater
- The Steppenwolf Theater
- The Goodman Theater
- The Museum of Contemporary Art (MCA)
- The Art Institute
Even if we add up across organizations, patronage
of top cultural organizations is infrequent

**Frequency of Patronizing Chicago Cultural Organization**

(n = 999)

- 27% of Respondents attended a cultural event 27% of the time.
- 14% of Respondents attended a cultural event 14% of the time.
- 13% of Respondents attended a cultural event 13% of the time.
- 2% of Respondents attended a cultural event 2% of the time.
27% never attend...
28% attend once or twice in a year.

27% of Chicagoland's adults never visit any of these seven cultural institution in the course of a year.
Among Chicago’s top cultural institutions, the Art Institute is the most frequently visited.
What “drives” awareness?

Relationship between aided brand awareness and:
- Respondent demographics
- Engagement with other cultural organizations
Brand awareness **not** linked to gender or income

**Aided Brand Awareness by Respondent Gender**
(n = 414; eta = 0.00)

- Female: 26%
- Male: 25%

**Unaided Brand Awareness by Household Income**
(n = 400; eta = 0.02)

- $<50k: 17%
- $50-$74k: 23%
- $75-$99k: 29%
- $100-$124k: 37%
- $125-$149k: 21%
- $150+: 26%
Brand awareness is linked to education and frequency of patronizing cultural organizations

Aided Brand Awareness by Respondent Education
(n = 406; eta = 0.29)

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Frequency</th>
<th>Aided Brand Awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phd/MD</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>MA/MS</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>BA</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>Assoc Degree</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>HS Diploma</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>

Aided Brand Awareness by Patronizing Cultural Orgs
(n = 416; eta = 0.30)

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Aided Brand Awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Often</td>
<td>43%</td>
</tr>
<tr>
<td>Occasionally</td>
<td>19%</td>
</tr>
<tr>
<td>Infrequently</td>
<td>12%</td>
</tr>
<tr>
<td>Never</td>
<td>12%</td>
</tr>
</tbody>
</table>
Awareness of Alliance Française Greater Among Patrons of Chicago Cultural Organizations

Aided Awareness:

Alliance Française

(n = 416; eta = 0.30)

Frequency of Attending Any Cultural Org.

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Aware</th>
<th>Not Aware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Often</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>Occasionally</td>
<td>81%</td>
<td></td>
</tr>
<tr>
<td>Infrequently</td>
<td>88%</td>
<td></td>
</tr>
<tr>
<td>Never</td>
<td>88%</td>
<td></td>
</tr>
</tbody>
</table>

Aware

Not Aware
Aided awareness by frequency of patronizing Chicago’s top theaters

Aided Awareness:
Alliance Française
(n = 416; eta = 0.25)

<table>
<thead>
<tr>
<th>Frequency of Attending Theater</th>
<th>Always Aware</th>
<th>Occasionally Aware</th>
<th>Sometimes Aware</th>
<th>Never Aware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Often</td>
<td>46%</td>
<td>54%</td>
<td>30%</td>
<td>22%</td>
</tr>
<tr>
<td>Occasionally</td>
<td>70%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Infrequently</td>
<td>78%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Never</td>
<td>84%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Aided awareness by frequency of patronizing Chicago’s symphony & opera

Aided Awareness:
Alliance Française
(N = 416; eta = 0.28)

Frequency of Attending Symphony/Opera

- Often: 45% Aware, 55% Not Aware
- Occasionally: 30% Aware, 70% Not Aware
- Infrequently: 20% Aware, 80% Not Aware
- Never: 15% Aware, 85% Not Aware
Aided awareness by frequency of patronizing Chicago’s top art museums

**Aided Awareness:**

**Alliance Française**

(n = 416; eta = 0.30)

<table>
<thead>
<tr>
<th>Frequency of Attending Art Museums</th>
<th>Aware (%)</th>
<th>Not Aware (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Often</td>
<td>41%</td>
<td>59%</td>
</tr>
<tr>
<td>Occasionally</td>
<td>21%</td>
<td>79%</td>
</tr>
<tr>
<td>Infrequently</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>Never</td>
<td>9%</td>
<td>91%</td>
</tr>
</tbody>
</table>
Conclusion:

Awareness of the AF-C…

- Is linked to respondent education

- The respondent’s participation in the Chicago arts and cultural community
Interest in learning a foreign language

- What is the size of our potential audience?
- How does interest in French compare with other languages?
“Maybe I should study French… (again).”

A considered decision:

- Virtually all of our students have studied French in the past.
- The difference between beginner and advanced students is their personal objectives:
  - Beginners:
    - Travel
    - Transactional French
  - Advanced students:
    - Perfectionnement
    - Cultural immersion
Fall 2016 Open House Survey:

Why do our students care about French?

Travel & training:

- 80% have been to France.
- 48% are planning a trip.
- 41% studied French in high school.
- 39% studied French in college.

Prior Contact French Language & Culture
(Multiple Responses; n = 56)

- Q5.a - Traveled in France: 80%
- Q5.b - HS French: 41%
- Q5.c - Worked in France: 25%
- Q5.d - Previous AF Course: 21%
- Q5.e - Studied in France: 18%
- Q5.j - Attend AF Cultural Events: 18%
- Q5.g - Plan Trip to France: 18%
- Q5.h - College French: 18%
- Q5.h - Need French for Work: 18%
- Q5.i - Lived in France: 16%
- Q5.f - No Prior Contact: 5%
Nearly 80% of Chicagoland’s adult population has studied a foreign language in the past...

Have you ever studied a foreign language?

- Spanish & French are the dominant foreign languages
- Spanish: 44%
- French: 17%
- German: 7%
- Italian: 2%
- Latin: 2%
- Russian: 1%
- Japanese: 1%
- Hebrew: 1%
- Chinese: 1%
- Polish: 1%
- Arabic: 1%
- Other: 1%
- No - have not: 21%
About 16% of Chicagoland’s adult population is currently studying a foreign language...

Are you currently studying a foreign language?

- No: I am not 84%
- Spanish – 6%
- French – 3%

Languages studied:
- Spanish: 6%
- French: 3%
- Other: 1%
- Chinese: 1%
- Italian: 3%
- Japanese: 1%
- German: 1%
- Hebrew: 1%
- Polish: 0%
- Russian: 1%
- Arabic: 0%
Only 12% of Chicagoland’s adult population is planning to enroll in the next six months

*Are you thinking of enrolling in foreign language program in the next six months?*

- **No Plans**: 62%
- **Not Sure**: 26%
- **Studying FL now**: 4%
  - **French**: 3%
  - **Spanish**: 3%
  - **Study FL Now**: 4%
  - **Other**: 0%
More than half of those currently studying French are using online methods.

**What method are you currently using to learn French?**

(n = 29)

- Tutoring: 7%
- Hybrid Mix: 14%
- App like Babble: 34%
- Rosetta Stone: 21%
- Trad Classroom: 24%
More than half of those considering language training would prefer online or hybrid methods.

What method would you prefer for future language training?

(n = 144)

- Rosetta Stone 22%
- Hybrid Class/Online 16%
- Hybrid Class/Skype 4%
- Classroom 12%
- Tutoring 8%
- App Babble 13%
- Other - DK 24%
- Other 1%
Conclusions…

- Low awareness of the Alliance Française
- Our perceived image improves with frequency of contact
- “French” a strong second in terms of interest
Conclusions: low involvement, low awareness

Unaided brand awareness

- Respondents had difficulty recalling *any* of the foreign language training & cultural center in Chicago.

- The AF-C was mentioned first by less than 2% of the adult population.

- Even with five opportunities to do so, only 3% of the population in the greater Chicago area mentioned the AF-C.
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A very sleepy category:

- None of the top organizations, including the AF-C, are “making any noise” – breaking through to gain attention.
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- Classroom: 12%
- Other - DK: 24%
- Other: 1%
Respondent demographics

Demographic characteristics of respondents who participated in the survey
Respondent demographics

**Respondent Gender**
(n = 995)

- Female: 54%
- Male: 46%

**Age Distribution**
(n = 997)

- 25-34: 23%
- 35-44: 24%
- 45-54: 24%
- 55-64: 16%
- 65 +: 13%
Respondent Demographics

**Educational Attainment**
(n = 966)
- HS Diploma: 26%
- BA: 35%
- Assoc Degree: 18%
- MA/MS: 16%
- Phd/MD: 5%

**Income Distribution**
(n = 947)
- $50k - $74k: 20%
- $75-$99k: 21%
- $100-$124k: 11%
- $125-$149k: 6%
- $150-$174k: 4%
- $175-$199k: 3%
- $200k +: 3%
- < $50k: 32%
More than 50% of respondents used their cellphone to complete the survey

Device Used to Complete Survey
(n = 999)

- Cellphone: 51%
- Laptop: 22%
- Desktop: 17%
- Tablet: 10%

Everything we do has to fit on a cellphone screen – and look good in the process!