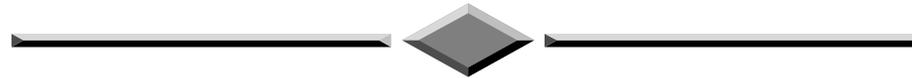


*A Survey of Arts and Culture
Consumers in Northeast Ohio:
Arts and Culture Participation - Benefits and Barriers*



**July - November, 2001 Data Collection
March, 2002 Analysis Completed**

Conducted by



Cypress Research Group

For

Community Partnership for Arts and Culture

**50 Public Square, Tower City Center, Suite 555
Cleveland, Ohio 44113
(216) 575-0331**

Operating support for The Community Partnership for Arts and Culture comes from The Cleveland Foundation, The George Gund Foundation, The Kulas Foundation, The John P. Murphy Foundation and The Key Foundation.

The Community Partnership for Arts and Culture

If you live in Northeast Ohio, The Community Partnership for Arts and Culture (The Partnership) is working on your behalf. The Partnership is a nonprofit agency formed in 1997 to strengthen Northeast Ohio's cultural assets and bring them to more of the region's people. We serve cultural organizations, individual artists and nearly three million residents in seven counties: Cuyahoga, Geauga, Lake, Lorain, Medina, Portage and Summit.

Our Mission

...is to strengthen Northeast Ohio's cultural assets and help more residents and visitors enjoy them.

What We Do

We offer programs in four areas: public policy, communication, capacity building and research.

How We Operate

We are committed to broad and inclusive community participation.

What We Believe

We believe that arts and culture improve the quality of life. It strengthens education, stimulates economic development and motivates people to live, work and visit in Northeast Ohio. Arts and culture nurture and inspire. They promote communication among the region's diverse people and communities.

A healthy and stable arts and cultural sector is a cornerstone for the region's continued economic and social vitality.

This Report

The research and findings contained in the following pages are designed to strengthen the arts and cultural sector's marketing abilities. The more people know about the high quality of Northeast Ohio's arts and cultural organizations' products, the more they benefit.



COMMUNITY **PARTNERSHIP** FOR ARTS AND CULTURE

Table of Contents

Executive Summary

Summary, Conclusions and Recommendations	4
--	---

Introduction

Background & Objectives	9
-------------------------------	---

Methods

Data Collection	10
Stage One: Focus Groups	10
Stage Two: Telephone Interviews	11
Sampling & Data Precision	11

Results

Respondent Profile	14
Level and Type of Participation in Arts and Cultural Activities ..	21
Subscriptions & Memberships	30
Benefits of Participation in Arts & Cultural Activities	35
Barriers to Participation in Arts & Cultural Activities	44
Marketing & Communications	63
Special Topics: Akron Vs. Cleveland as the Arts & Cultural Centers - The 'Boundary Communities'	70
Special Topics: Key Influences on Arts & Cultural Participation	73

Summary, Conclusions & Recommendations

Eight focus groups and a telephone survey of 800 adults were conducted from July, 2001 to November, 2001. Participants in the study were only those who have participated in at least one arts and cultural activity or event during the past year. The objectives of this study were to 1) identify the major benefits of arts and cultural participation in NE Ohio, 2) identify the major barriers and motivators for arts and cultural participation. This information was intended to aide in the formulation of programming and marketing concepts for arts and cultural organizations in NE Ohio.

The major findings of the study are as follows:

1. Since only those that have participated in at least one arts and cultural activity in the past year were included in our study, we can get a measure of the ‘incidence’ of this sort of participation in our population. That is, we found that 87% of those contacted were eligible to participate in our study. Therefore, we can estimate that 13% of the NE Ohio adult population does not participate in any arts and cultural activity in any given year.
 - Typically we see a greater proportion (25-35%) of senior citizens that participate in telephone surveys than there are seniors in the general population. In our study, however, we did not see this phenomenon - only 12% of the survey participants were senior citizens. We can therefore conclude that a greater proportion of senior citizens than non-senior citizens were ‘screened out’ of the survey process because they did not participate in arts and cultural activities at any level. That is, this study suggests that senior citizens are under-represented among the arts and cultural patronage.

Conclusion & Recommendation

Senior citizens are unlikely to have many limits on their time (one of the major barriers to increased participation in arts and culture activities). Although they are very likely to have limits on their expendable income, this study suggests there are many opportunities for increased audience sizes among the senior citizen community. This is because when seniors can and do participate in arts and cultural activities, they tend to do so at a higher-than-average frequency - 22% of seniors participate at least twice a month, compared to 14% of non-seniors. Seniors, however, will have different or more acute issues than their younger counterparts - lack of transportation, concerns with safety, fear of unfamiliar places - and therefore will require different treatment (operations and marketing) by the arts and cultural institutions. They should be considered a separate ‘segment’ and should be marketed to and communicated with accordingly.

2. Although professional sports was the activity enjoyed (at least once a year) by the largest segment of our telephone sample (81%), on average NE Ohioans attend less than 2 professional sporting events a year. In sharp contrast, on average this population attends approximately 8 arts and cultural activities per year.



Summary, Conclusions & Recommendations

3. **Marketing Messages:** There were several strong themes of benefits obtained by NE Ohioans when attending arts and cultural activities or events. These strong themes are recipes for marketing messages for arts and cultural organizations wishing to build audiences. Messages which communicate the following will resonate the most strongly with the NE Ohio arts and cultural consumer group:

- *Entertainment/Fun* (extremely strong message in focus groups also) (91% top-two-box score)
- *Sharing activities with family* (extremely strong message) (78%)
- *Education for children/grandchildren* (extremely strong message) (62%)
- *Exposure to new things* (62%)
- *Self-improvement/Education* (58%)
- *Escape from normal routine* (56%)
- *Learning about other cultures* (53%)

Benefits expressed by a minority of NE Ohioans, which would be messages with less appeal, included:

- *Social interaction* (44%); *Being close to talented people* (39%); *Knowing an event is good because everyone is talking about it* (33%); *Linkage to own heritage* (25%); *To be 'included' in the activity because everyone (circle of acquaintance) is talking about it* (13%).

4. The arts and cultural community is viewed as a single entity, not as the hundreds of separate and distinct organizations that actually comprise this community. What one organization does effects the consumer's perception of the others. Although at some level consumers understand that one institution is separate from another, they also expect the arts and cultural organizations to be unified. That is, they expect the arts and cultural community, as a whole, to look for ways to make the arts and cultural experiences better for the NE Ohio consumer.
5. Also, the experience of arts and culture (and how people make judgments on the arts and cultural experience itself) is a sum of every single experience the consumer has from the time he or she leaves the home to when he or she returns. That is, the arts and cultural experience is judged by the whole experience - the travel to the site, the ease of finding the site, the ease of finding parking, the cost of the parking, the availability, cost, and quality of nearby food service, the ease of entering the venue, the traffic after the venue - **the sum of all of these impressions** impact whether or not a consumer decides to try an arts or cultural experience, recommend it to a friend, or decide to come back. Below is a more in-depth discussion of the specific barriers to increased participation, some of which are unique to NE Ohio's arts and cultural consumers.



Summary, Conclusions & Recommendations

6. We examined 22 potential ‘barriers’ to participation in arts and cultural activities, with some surprising results. The top barriers to increased participation included:
- *Not enough time* - It is not unexpected that this is the biggest reason people do not participate in arts and cultural activities more often. This was particularly true for consumers in the 35-54 age group.
 - *Activities cost too much* - On face value, this is deceiving. It is true that for many consumers, money is a limited resource. However, focus group participants were quick to point out they always ‘find a way’ to pay for an event that they ‘really want to’ attend. The issue here is not so much the absolute cost of activities, but rather the ‘value’ they provide. And ‘value’ appears to be related to both the quality of the art or cultural experience itself, *and* the peripheral experiences surrounding the event (see below - parking, traffic, seat availability). In sum, consumers judge arts and cultural experiences on the event itself and how *fairly* they perceive they were treated in terms of value and service.
 - Through multivariate statistical modeling we also found that income levels are not related to levels of participation in arts and cultural activities. Education levels, however, are related to participation levels in that those without a high school education participated at lower levels and those with graduate degrees participated at higher levels.
 - *Expensive parking* - This of course focuses on downtown venues, but the perceived unfairness in regards to parking costs reflect on the arts and cultural community as a whole. The issue is that consumers see parking costs rise dramatically during events. Although at some level they understand that parking establishments are separate businesses from arts and cultural institutions, they feel the arts and cultural community could address this issue.

Conclusion & Recommendation

Arts and cultural institutions which are limited to parking facilities which practice high pricing during events should develop partnerships with certain parking sites and offer discount passes for customers. These discounts do not have to be substantial (\$2-\$3). Institutions which are not effected by expensive parking should emphasize this benefit in their marketing communications.

- *I don't always know about activities until it is too late* - One-third of respondents believed this limited their participation, and this is a direct criticism of the scope and effectiveness of marketing and communications by the arts community.

Conclusion & Recommendation

Respondents told us that in order to keep abreast of upcoming events in NE Ohio, one has to ‘know where to look’ and continuously ‘read the fine print.’ This suggests only the most motivated and meticulous arts and cultural consumers are aware of all that is available to them, and that the arts and cultural community is failing to keep the ‘passive information’ consumer aware. The arts and cultural community needs to examine ways to present unified communications to potential customers and offer them an easy ‘one-stop-shopping’ experience to get information on all upcoming events (not just the big venue activities). The arts and cultural community needs to drive its customers to a cohesive, easy-to-use, single source of arts and cultural programming in NE Ohio, i.e. www.culture4me.org.



Summary, Conclusions & Recommendations

- *Traffic after events* - NE Ohio is not known for its traffic jams, yet respondents were quite vocal on the difficulties they face when trying to drive away from events. They believe this is an issue which could be remedied by the arts and cultural institutions. It raises the question of how can arts and cultural organizations, either on their own or in collaboration, work with local officials to provide better traffic control.

Conclusion & Recommendation

Arts and cultural institutions which are effected by heavy traffic should, when possible, avoid timing events coincident with other nearby events (e.g. sporting events). When heavy traffic is expected, hire traffic flow assistance. Institutions which are not effected by exit traffic issues should emphasize this benefit in their marketing communications.

- *It is difficult to get good seats* - Focus group participants perceived a decrease in the ‘average person’s’ access to the ‘good seats.’ They see this as an increasing ‘commercialization’ of arts and cultural activities which cater to a small but wealthy group of customers or corporate sponsors. Many people believe it is literally impossible for them (no matter how early they attempt to get tickets) to acquire the ‘best seats,’ which are now only offered to ‘corporations,’ ‘radio stations,’ ‘brokers’ and ‘subscribers.’ They see this as unfair, and it has impacted their impression of the arts and cultural community overall. Exacerbating their sense of unfairness is often seeing these seats empty throughout performances.

Conclusion & Recommendation

Arts and cultural institutions which practice limiting availability of the ‘best seats’ to certain customer sectors should examine ways to ensure that prime seats are never left empty. In our survey there was interest (46% at least somewhat interested) in a ‘bartering system’ for people to exchange tickets which they find they cannot use because of a conflict - a not uncommon occurrence.

- *Lack of desirable parking* - NE Ohioans appear to be very demanding in regards to the distance and quality of parking.

Conclusion & Recommendation

For institutions limited to various nearby parking facilities, ensure that signage is more than adequate. For those with attached and high quality parking facilities (especially no cost), emphasize that in marketing materials.



Summary, Conclusions & Recommendations

Conclusion & Recommendation

In sum, the arts and cultural community in NE Ohio has an image problem. A significant number of arts and cultural consumers want to know they are valued as customers by the organizations. In order to build long-term loyalty and support in this community, this trend must be reversed. The consumer needs to feel that the arts and cultural community is 'on their side,' and this can be accomplished by aligning programming, operations and pricing policies to correspond with consumers' expectations. In addition, organizations need to understand that expectations differ among demographic groups of consumers.

7. NE Ohio consumers of arts and culture obtain their information about upcoming events through a variety of means. The most common is through their 'local community newspaper' (42%) or major area newspaper (*Cleveland Plain Dealer*, 22%; *Akron Beacon Journal*; 2%). Radio (13%) and television news (10%) were also common sources of arts and cultural activities. The Internet was a source of information for one-in-ten, with www.Cleveland.com being an extremely commonly used site.
8. Ninety-six percent of all survey respondents were able to identify a specific person (usually a family member) or event (usually a school activity) which influenced their adult tastes and level of participation in arts and cultural activities. This was a strong theme in the focus groups also. Participants clearly articulated who or what and when they were introduced to the world of art and culture. Participants were grateful for this exposure, so much so that they believed it was their responsibility to ensure that their children and/or grandchildren were given the same experiences.
 - We also discovered there is a direct and strong correlation between the age of exposure to arts and cultural activities as a child and level of participation in those activities as an adult. Those who were exposed to arts and cultural activities as a very young child (5 and under) were twice as likely to be heavy consumers of arts and cultural activities as an adult than those that were not exposed to arts and cultural activities until they were a young adult.

Conclusion & Recommendation

Arts and cultural marketing should leverage this sentiment into two ways. First, there is a 'nostalgia' and 'family connection' component to participation in arts and cultural activities. Second, parents and grandparents can be assured that bringing arts and cultural experiences to their children/grandchildren will have life-long positive benefits. This finding also has implications for the long-term health of the arts and cultural community in NE Ohio - building new audiences and loyalty to art venues and forms starts at a very young age. Continue developing and emphasizing school and youth programs.



Introduction

Background & Objectives

The Community Partnership for Arts and Culture has set forth a plan to help sustain the region's art and cultural assets while connecting those assets with more people. This plan called for strategies to 1) increase access of arts and cultural activities to all of NE Ohio's residents; 2) expand the arts and cultural activities in NE Ohio so that they are part of learning for people of all ages; 3) enlist partnerships among arts and cultural institutions and NE Ohio's other public and private sectors; and, 4) ensure the vibrancy and fiscal health of deserving arts and cultural institutions by improving private and public financial support to be more in line with NE Ohio's peer communities nation wide.

One leg of this overall effort lay squarely on the shoulders of the arts and cultural institutions themselves. Like all for-profit or not-for-profit entities, our arts and cultural institutions will thrive best when they are properly aligned with the needs and desires of existing and potential patrons. This study was designed to test that alignment and, in general terms, **to discover what drives NE Ohioans to participate in arts and cultural activities, and perhaps more importantly, what prevents them from doing so more often.** More specifically, the objectives of the current study were to determine:

- Are NE Ohioans satisfied with the level and type of arts and cultural activities available to them?
- What sort of activities do they favor?
- Who is the typical NE Ohio arts and cultural patron in terms of general demographic characteristics?
- How do frequent patrons differ from infrequent patrons? How do they differ in terms of demographic characteristics and attitudes about participation?
 - What influenced and continues to influence that level of arts and cultural participation of NE Ohioans?
- What motivates consumers to become members or subscribe to arts and cultural series?
- How do consumers learn about specific activities, and how can communications be improved?

Methods

Data Collection

Data for this study were collected in two phases, using two different research methodologies:

Stage One: Focus Groups

A total of 8 focus groups were conducted during July of 2001. All of the groups were conducted during evening hours, and participants were given a \$50 honorarium for their participation. Groups were approximately 90 minutes in duration. All participants were adult members of the general population, with only one criterion for eligibility: each participant had attended at least one arts or cultural event or activity within the year preceding the focus group meeting. While recruiting for the group and checking for eligibility, participants were ‘screened’ according to the following: ‘Excluding activities which are elementary, middle or high-school based, have you done at least one of the following in the past year: gone to a museum, attended a concert or some other live music or dance performance, seen a play or musical, gone to an art gallery, fair or festival, attended a heritage or historical program, or gone to a local zoo, nature or science center? Those that answered affirmatively were asked to participate in the group, with the further guidelines of filling the group with a reasonable mix of adult age groups and genders.

The 8 groups were further distinguished by 1) Five groups which were based on the geography of residence throughout NE Ohio, and 2) three groups based on racial/ethnic composition. The eight groups were comprised of the following:

- Residents of the ‘east side’ of Cleveland proper and Eastern Cleveland suburbs;
- Residents of the ‘west side’ of Cleveland proper and near-Western Cleveland suburbs (Brooklyn, Parma, etc);
- Residents of far-Western Cleveland suburbs (Rocky River, Westlake, Avon Lake, etc);
- Residents of Akron, Akron suburbs and southern Cuyahoga County;
- Residents of Southeast Cuyahoga County (Twinsburg, Aurora, etc.);
- African Americans (who reside throughout the NE Ohio);
- Asian Americans (who reside throughout the NE Ohio);
- Hispanic/Latino Americans (who reside throughout the NE Ohio).

At the outset of the study it was our intent to also conduct a focus group comprised of Native American Indians. However, given the extremely small population of Native American Indians in NE Ohio, recruitment of a full group proved impossible. Therefore, in order to include the potentially unique viewpoints of Native American Indians in this study, we conducted ten in-depth telephone interviews. The findings from those interviews, along with the findings from all of the focus groups, are discussed throughout the main body of this report.

Methods

Data Collection (continued)

Stage Two: Telephone Interviews

- A total of 800 residents of NE Ohio were surveyed from October 22 to November 4, 2001.
- All interviews were completed via telephone from a centralized telephone data collection center.
- The interviews lasted, on average, 17 minutes. The survey instrument was designed to capture both quantitative and qualitative information; it can be found in the Appendix for reference.
 - In order to maximize interviewing resources and not overburden respondents, the survey instrument was ‘split’ into three main sections. One section contained ‘core’ questions, which were asked of all 800 respondents. For the remainder of the survey, respondents were asked only one of two series of questions, which were randomly assigned to potential respondents.
- Interviews were conducted during evening and weekend hours.
- As with the focus group participants, survey participants were only those that had participated in at least one arts and cultural activity or event within the past year.
- To boost participation, at the outset of the survey respondents were told that they would be entered into a drawing for a pair of tickets to their choice of several local arts and cultural activities or events.

Sampling

A random sample of potential respondents was drawn from both listed and random digit dialing sample, which was stratified based on zip codes of targeted NE Ohio municipalities. The number of collected interviews (the final sample) were stratified allowing for an oversample of proportionally smaller population regions. The final data were weighted according to 2000 decennial census population data for all municipalities to properly reflect the NE Ohio population base. The unweighted stratification scheme, as well as the weighted results of the same sample, are presented on the following page.

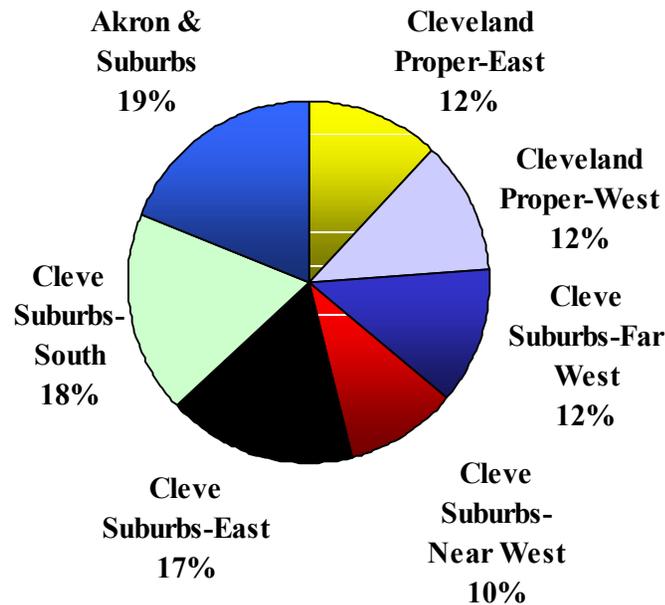
Methods

Data Collection (continued) - Stage Two: Telephone Interviews

Geographic Strata of Telephone Sample

Unweighted Data

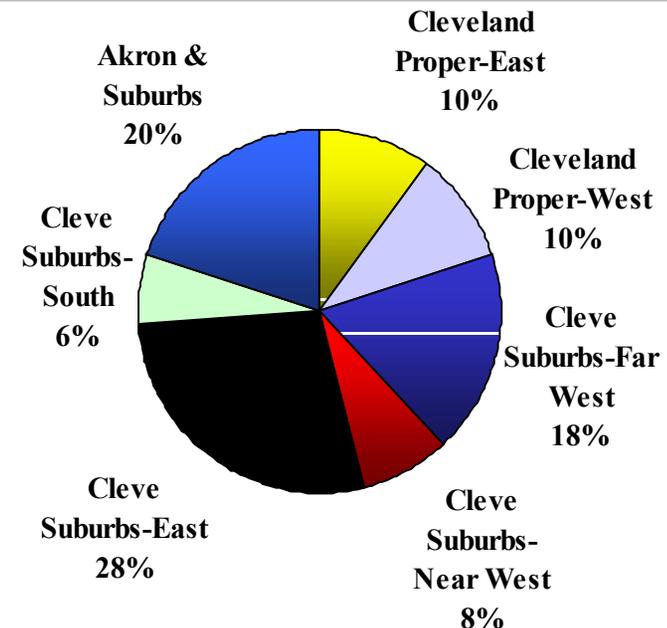
n=800



Geographic Strata of Telephone Sample

Weighted Data

n=800



These sampled communities represent 1.8 million adults in NE Ohio.

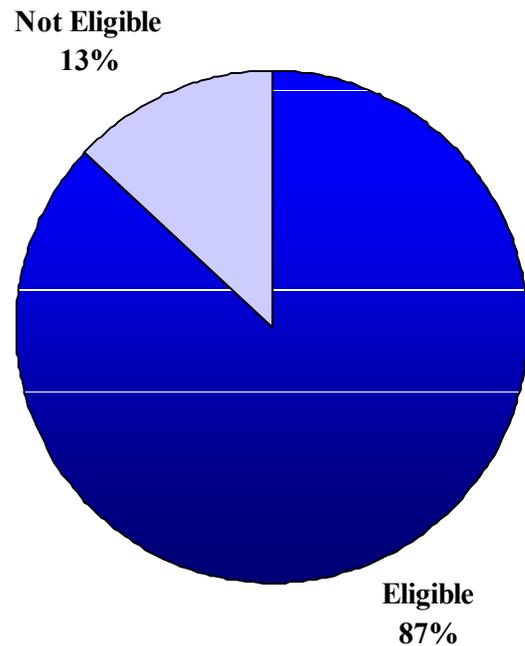
Herein, all results of the study presented are based on weighted data, unless otherwise noted.

Sampling & Data Precision

- A sample size of 800 allows us a margin of error of +/- 3.4%. That means that the proportional results that we've obtained in this sampling are within +/- 3.4% what we would have found had we interviewed the entire universe of adult NE Ohio residents that recently participated in arts and cultural activities. For those questions in the survey for which only 400 respondents were queried, the margin of error is +/- 4.9%.

Methods

Sampling - Percentage of Contacted Potential Respondents Not Eligible for Survey



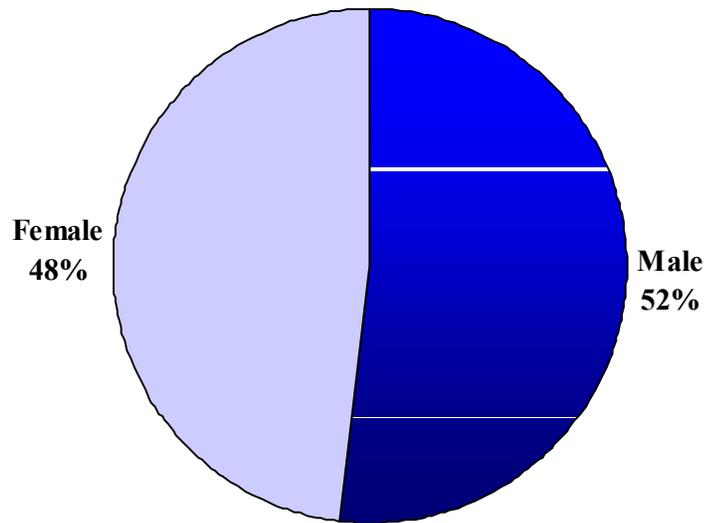
- This figure estimates the proportion of NE Ohioans (within our targeted geography) that have participated in at least one arts and cultural activity (as described in our survey) within the past year.
- This serves as an estimate of the proportion of the general population that is also an arts and culture consumer.

Respondent Profile

- Before we address the specific objectives of the study, it is useful to examine the demographic characteristics of the various subgroups sampled in this study. This serves two purposes. First, it familiarizes the reader with those characteristics which are likely to be associated with levels of participation and attitudes towards arts and culture which are frequently discussed throughout this report. Second, since only those that participate in arts and cultural activities are included in this study, reviewing the demographic characteristics of participants describes the group of NE Ohio arts and culture consumers demographically. Any differences between the group of our study participants and the general population are proxies for the differences between those that participate in arts and cultural activities in NE Ohio and those that don't.

Demographic Characteristics

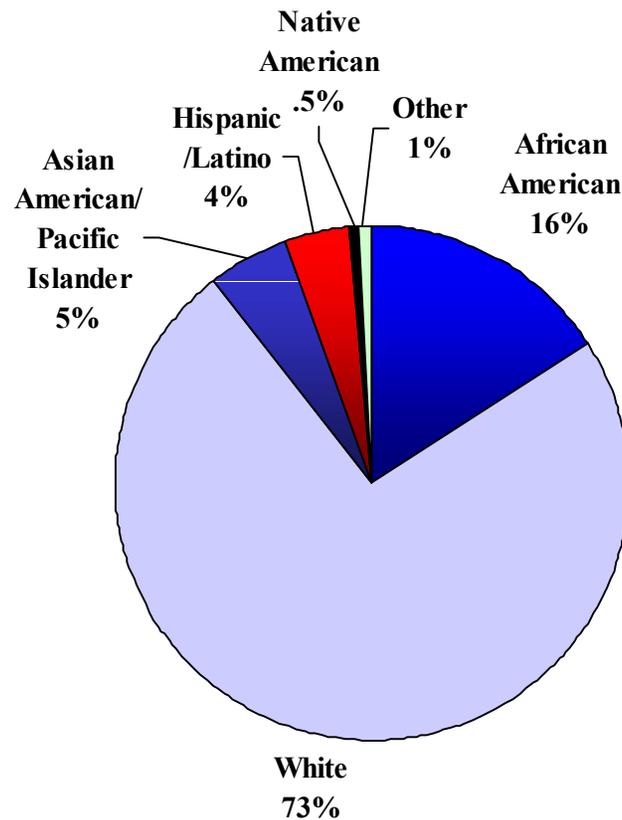
Respondent Gender *Weighted Data (n=800)*



- Overall, 52% of the respondents were male (weighted data). On an unweighted basis, 50% of the respondents were male. This was by design, in that during the interviewing process half of the interviews were intentionally conducted with males.

Demographics

*Respondent Cultural/Ethnic Background** *Weighted Data (n=800)*

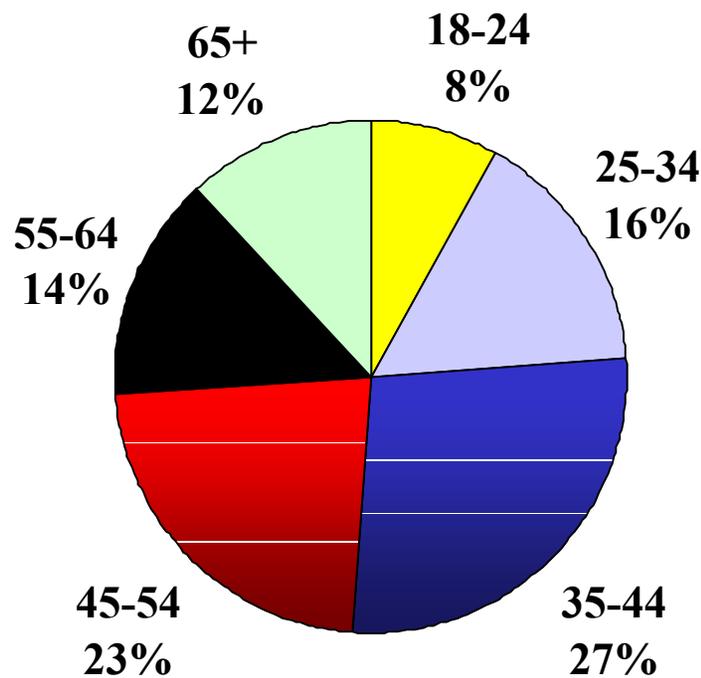


*Don't Know/Refused responses removed from base.

- The majority of respondents were White (73%). The second most common ethnic/racial group was African American, to which 16% of the respondents belonged. Another 5% of the respondents were of Asian/Pacific Islander descent, and about as many (4%) were of Hispanic/Latino descent. Very few (.5%) of the respondents were Native Americans, and the final 1% described themselves as some other race or ethnicity.
- Note that these figures reflect the population statistics of the municipalities sampled (well within the sampling margin of error).
- The ethnic/racial mix varied tremendously among the geographic regions sampled:
 - 37% of those in the city of Cleveland were African American, as opposed to the lowest levels of African Americans we sampled in the Cleveland West (3%) and South (3%) suburbs.
- Statistical analysis revealed that for much of the findings, African American, Hispanic/Latino and Asian American respondents were similar in their responses. Therefore, for brevity's sake, these respondents were referred to as one group ('Non-Whites') in the body of the report. Analyses specific to each of the racial/ethnic groups are available upon request.

Demographics

*Respondent Age** *Weighted Data (n=800)*



- This figure shows this sampled group of arts and culture patrons in NE Ohio includes people from all age groups. However, most commonly this group includes those in the middle age groups (35-44, 27%; and, 45-54, 23%).
- An interesting comparison, of course, is the composition of our sample to that of the adult population within our sampled geographic area. Making reasonable comparisons in this way, however, is difficult because telephone sampling *always* inserts a bias based on age: younger adults are usually under-represented in telephone samples, while older adults (especially seniors) are usually *over*represented. In fact, in telephone samples of random households, we typically see proportions of seniors in the 25% to 35% range, much higher than what we see in our sample (12%) (although the population figures for seniors in our region are 15%). We can conclude from this that seniors (those aged 65+) are arts and culture consumers in lower proportions than those in younger aged groups (especially middle age groups). We can hypothesize that this is due to many reasons (e.g., financial, limited mobility and access, etc.). We will examine this issue in later chapters.

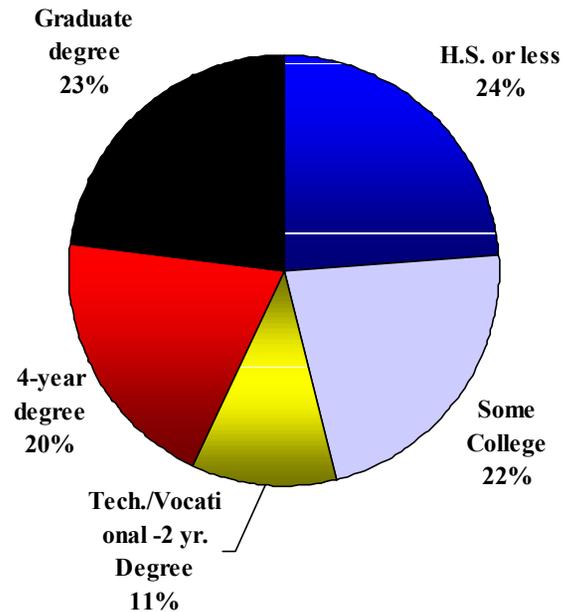
*Don't Know/Refused responses removed from base.

Demographics

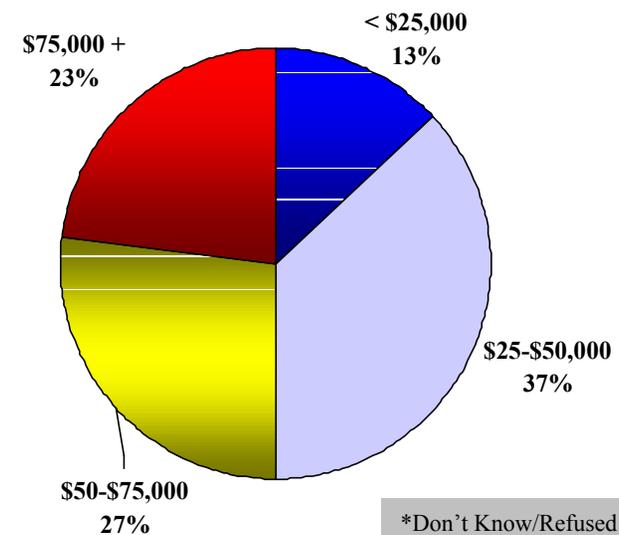
*Respondent Education/Household Income**

Weighted Data (n=800)

Education Levels



Household Income



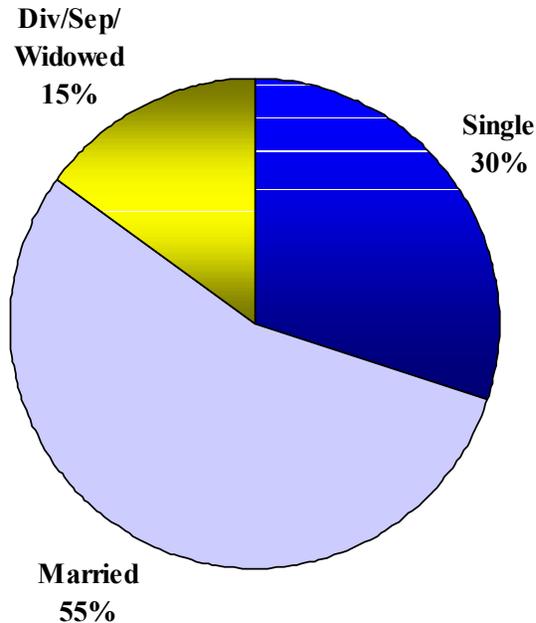
*Don't Know/Refused responses removed from base.

- Respondents, as a group, represented a wide variety of education levels and household income levels.
 - While one-in-four (23%) had graduate-level degrees, just as many had discontinued their education at the high school level (24%), and almost as many (22%) had obtained only some college. Eleven percent had secondary technical/vocational training or obtained a 2-year degree. Another 20% had a four-year college degree.
 - Likewise, while 23% of the respondents were relatively affluent with household incomes over \$75,000, a good portion of the respondents (13%) had household incomes below \$25,000. Most of the respondents, however, were of moderate income levels - 37% had incomes between \$25,000 and \$50,000, and the remaining 27% had incomes between \$50,000 and \$75,000.

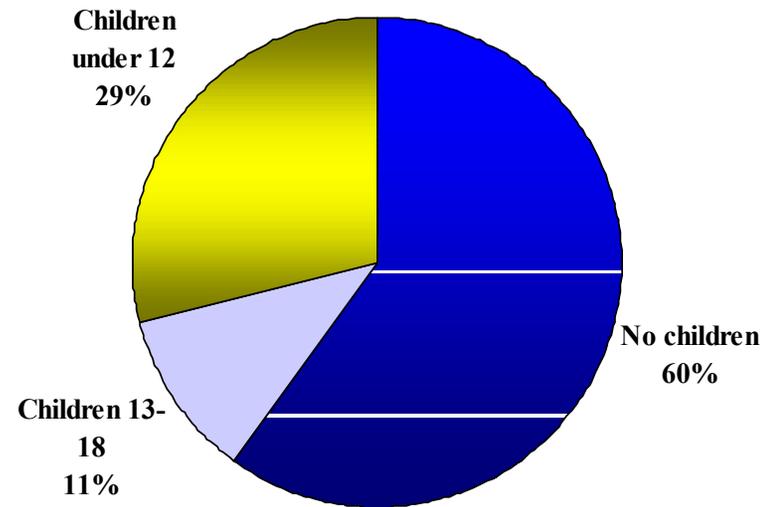
Demographics

*Household Composition - Marital Status & Children in Household** Weighted Data (n=800)

Marital Status



Children in Household



- Just over half of the respondents were married (55%). Almost one-third (30%) were single (never married), while 15% were divorced, separated, or widowed.
- The majority of respondents live in households where there are no children present (60%). However, a good portion of these arts/culture participating respondents have children in the household, most commonly young children (under age 12) (29%).

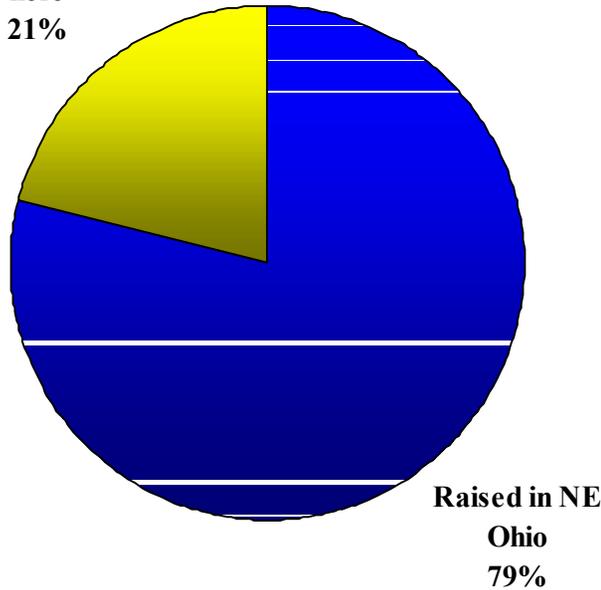
*Don't Know/Refused responses removed from base.

Demographics

Place of Origin*

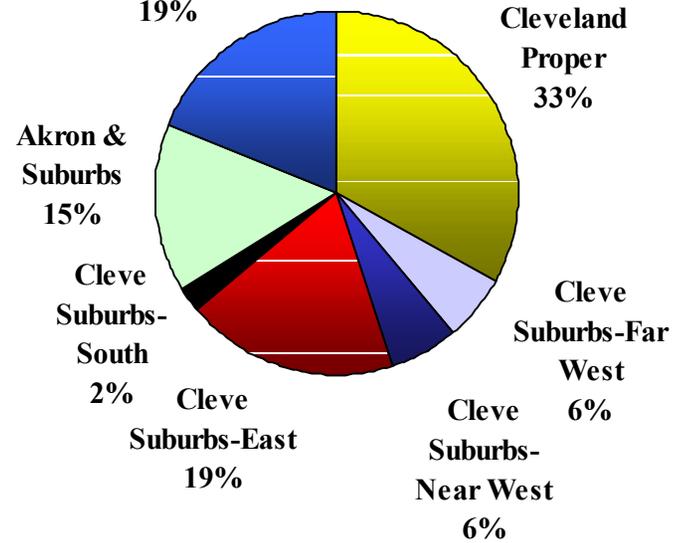
Weighted Data (n=800)

Relocated here
21%



- Eight-in-ten of the respondents were raised in NE Ohio, with the remaining 21% locating here only as an adult. This information has implications for our study in that one area that we explore in depth is the influence of childhood experiences on adult levels of participation in arts and cultural activities.

Other NE Ohio
19%



- For those 79% raised in NE Ohio, our sample includes a wide representation of those that were raised in different specific communities in NE Ohio.

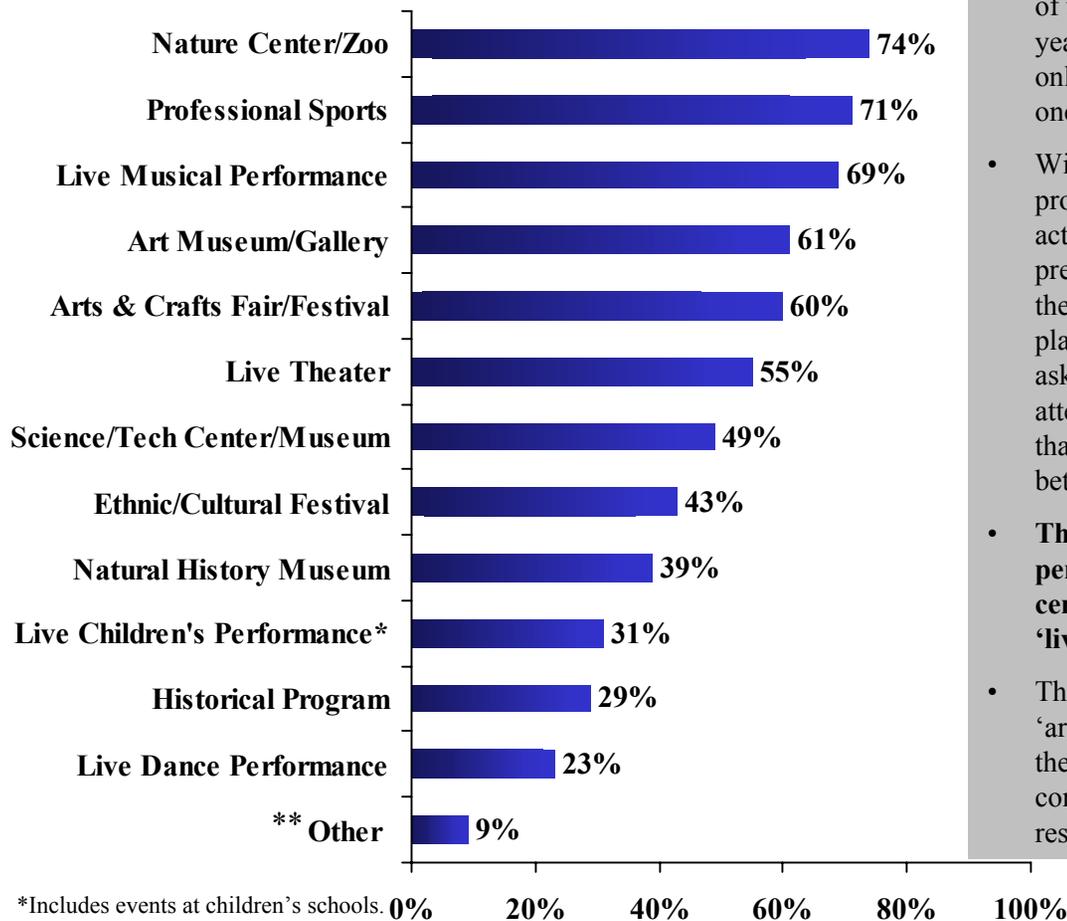
*Don't Know/Refused responses removed from base.

Level and Type of Participation in Arts and Cultural Activities

Level and Type of Participation in Arts and Cultural Activities

Type of Activities Weighted Data (n=800)

Percentage of Respondents

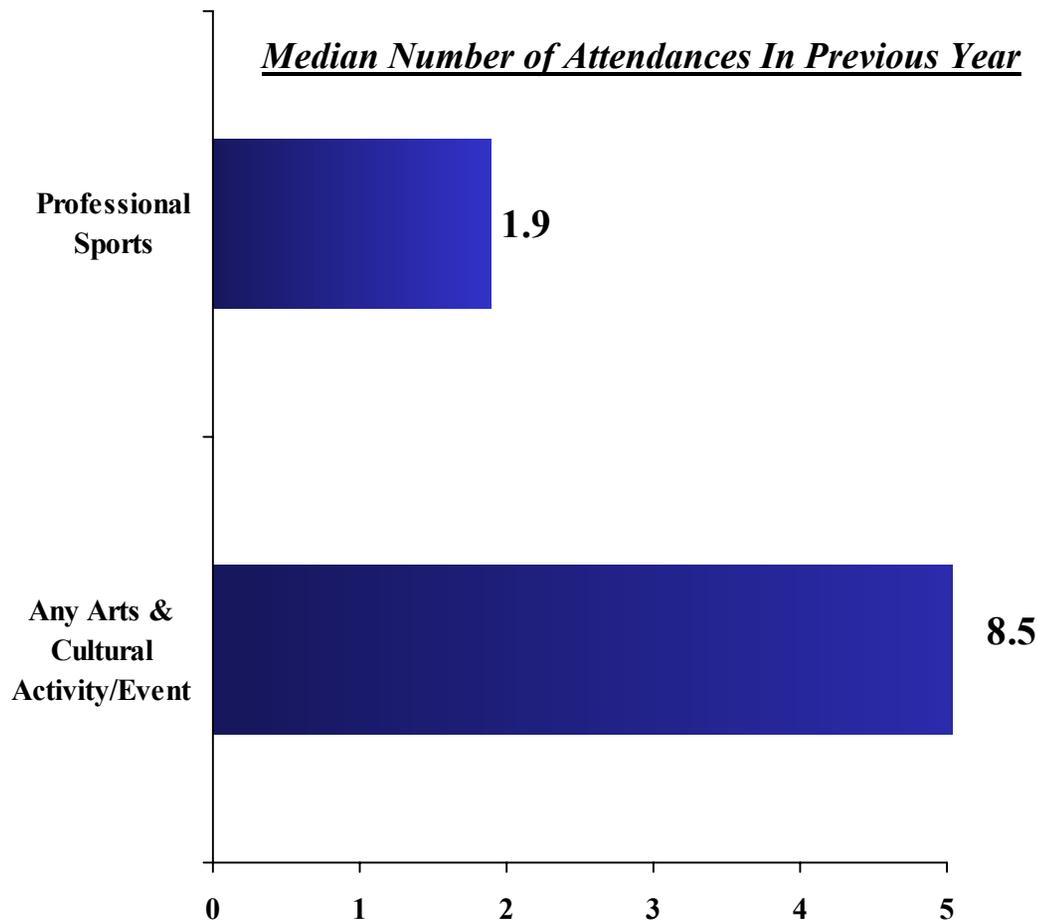


- This figure shows what percentage of our sample participated in each of the various general arts and cultural activities ‘during the past year.’ This figure does not show *level* or *frequency* of participation, only that proportion of respondents that attended each activity at least once.
- Within our sample, respondents were very likely to have attended a professional sporting event (71%). This is not an arts and cultural activity, *per se*, nor was it represented as such in the survey. We present it here, along with the arts and cultural activities, because of the strong emphasis both respondents and focus group participants placed on professional sports. That is, during the focus groups, when asked to tell us what types of arts and cultural activities people attended, ‘sports’ was very frequently mentioned. In fact, it appeared that many participants in our discussions made little distinction between sports and arts and cultural activities.
- **The most popular arts and cultural activity, in terms of percentage of people attending at least once, is visiting a nature center or zoo (74%). This was followed closely by attendance at a ‘live musical performance’ (69%).**
- The next level of popular activities include visiting ‘art museums’ and ‘arts & crafts fairs or festivals.’ (61% & 60%, respectively). Note that the participation interest in arts and crafts fairs or festivals corresponds to the Ohio Arts Council’s finding in it’s recent statewide research.

*Includes events at children’s schools. 0%
 **Comprehensive listing of ‘other’ responses can be found in Appendix.

Level and Type of Participation in Arts and Cultural Activities

Type of Activities *Weighted Data (n=800)*

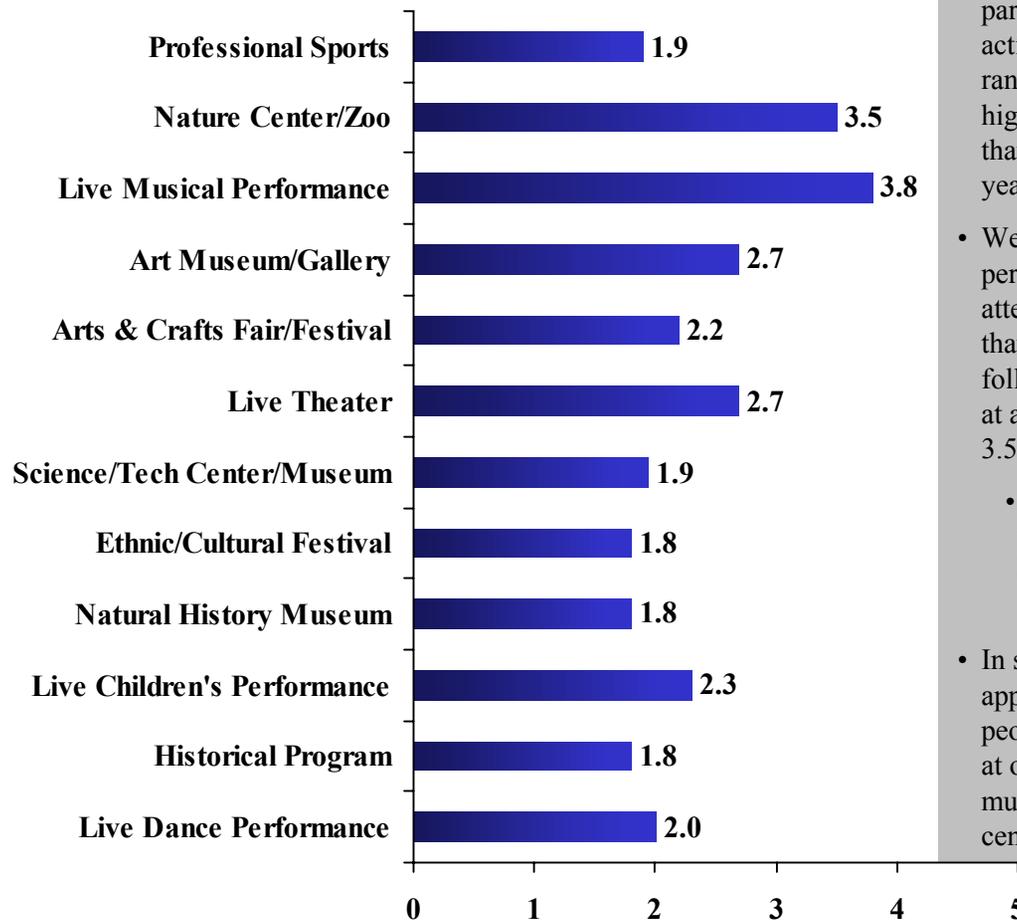


- On average, NE Ohioans attend more arts and cultural activities/events in a year than professional sporting events (mean of 8.5 vs. 1.9). There are a great deal more types of and opportunities for arts and cultural experiences than professional sports events (see next page).
 - Level of attendance at both professional sporting events and arts and cultural activities is twice as great among those with college degrees vs. those with only a high school education.
 - Also, it is very interesting that those that have attended at least one professional sporting event in the past year participated in arts and cultural activities at the same level as those that did not attend any professional sporting events. This strongly suggests that sports fans and arts and cultural participants are not mutually exclusive groups and that people do not decrease their level of arts and cultural participation because of their attendance at professional sporting events. Arts and cultural organizations need not shy away from co-marketing opportunities with sports activities since the sports and arts/cultural communities share the same customer base.

Level and Type of Participation in Arts and Cultural Activities

Type of Activities Weighted Data (n=800)

Mean Number of Attendances In Previous Year



- Another way to look at these data is to see how frequently people participate in each different type of activity in a given year. These are ranked, from top to bottom, by the highest to lowest proportion of people that attend at least one of these per year.
- We see here that 'live musical performances' are the most frequently attended activity among the fans of that genre (average of 3.8). This is followed closely by annual attendance at a nature center or zoo (mean of 3.5).
 - Live musical performances at for-profit venues were slightly more common (mean of 4.3) than not-for-profit venues (3.0).
- In sum, while professional sports appears to reach a greater number of people in terms of attendance at least at one event, the attendance at all live musical performances or nature centers/zoos annually is much greater.

Recommendation

Levels of attendance at some of these activities are correlated with each other - that is, people that tend to do one type of activity also do the other. Those correlated activities are:

- live musical performances and live dance performances;
- live dance performances and science & technology centers (because of the high proportion of those with children in both categories);
- natural history museums and science & technology centers;
- natural history museums and nature centers/zoos;
- arts & crafts fairs/festivals and historical programs; and,
- natural history museums and historical programs.

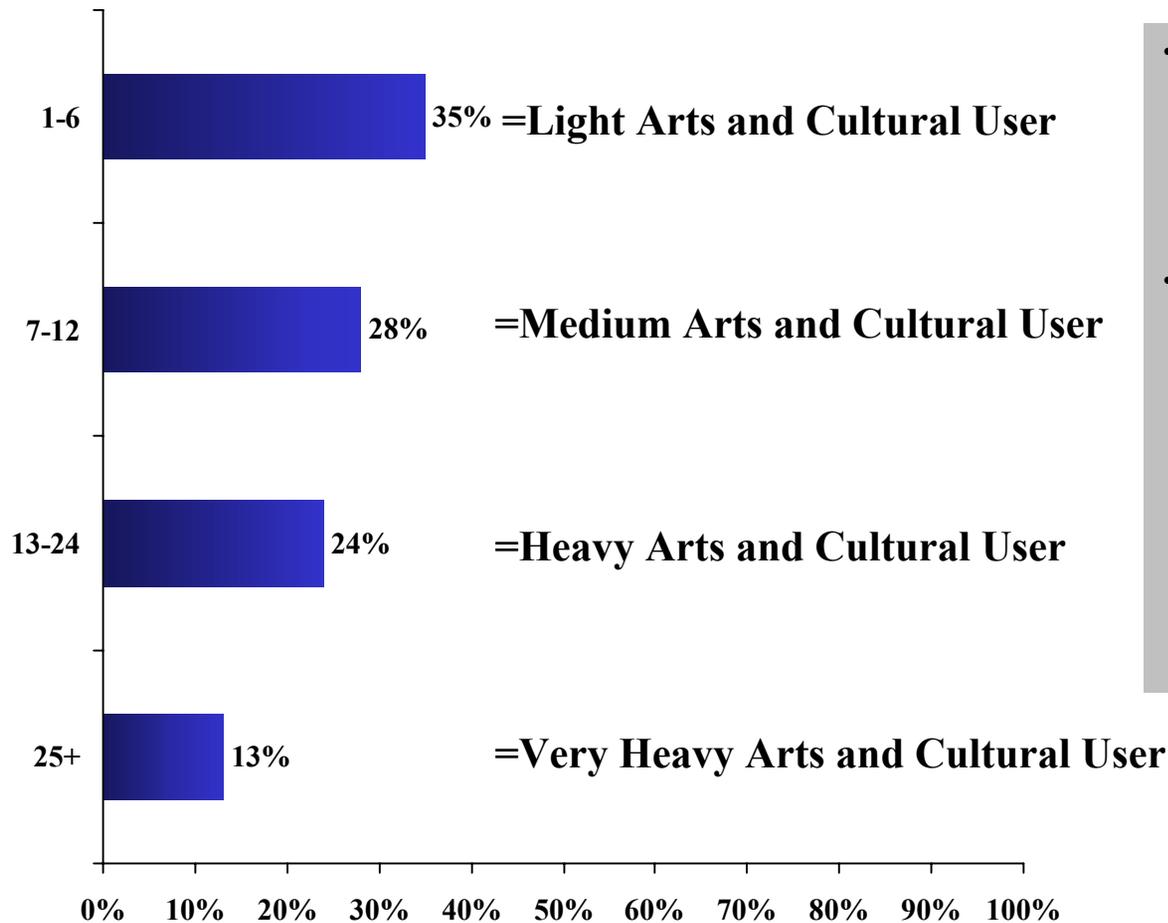
These should be viewed as higher impact co-marketing opportunities.

Level and Type of Participation in Arts and Cultural Activities

Level of Attendance of Arts and Cultural Activities (not including professional sports)

Weighted Data (n=800)

Median Number of Attendances In Previous Year



- By summing the total number of reported activities in the previous year, we can place respondents into one of four categories based on their level of participation in any arts and cultural activity (professional sports is not included in this tally).
- Here we see that about one-third of the respondents (35%) can be considered 'light' arts and cultural consumers - they reported attending less than 6 activities or events during the previous year. Another 28% of our respondents are 'medium' level consumers, attending 7-12 activities or events. The remaining attend arts and cultural activities more than once a month - the 'heavy' users (24%) go once or twice a month, and the 'very heavy' users go more than twice a month, on average (13%).

Level and Type of Participation in Arts and Cultural Activities

Who are the heaviest consumers of arts and cultural activities?

Weighted Data (n=800)

Heavier consumers of arts and cultural activities in NE Ohio tend to:

- ✓ Be slightly younger (18-34) or older (65+) than light consumers;
 - We found that middle-aged consumers (35-54) were most likely to cite ‘lack of time’ as a barrier.
- ✓ Be either never-married, or divorced/widowed/separated;
- ✓ Live in either the City of Cleveland or the Eastern Suburbs of Cleveland;
- ✓ Have a college degree (and those with graduate degrees tend to be even heavier consumers);
- ✓ Have household incomes over \$75,000 (although about one third of those with household incomes under \$50,000 are heavy consumers);
 - Income and education level are highly correlated in the general population, so we often find that both of these variables are related to measures of consumerism. We found, however, that if we ‘control for’ education level (using Multivariate Regression Analysis) income levels are no longer related to levels of arts and cultural participation. Education levels are much greater predictors of participation levels than income levels. This is the first time we have seen this relationship (where education levels are correlated with consumerism, not income levels) in survey data.
- ✓ Also attend professional sporting events more often than light consumers.

Level and Type of Participation in Arts and Cultural Activities

Type of Activities By Demographic Groups

Weighted Data (n=800)

This figure (continued on the following page) highlights demographic differences by activity or event attended. For example, for live theater, we see that 55-64 year-olds were more likely to have attended than any other age group, while those over age 65 were the least likely. We should emphasize that in almost every case, the differences among sample groups are not very large (in the 7%-15% point range). When large differences occurred, they are noted. Cells were left empty when no significant difference within that demographic group was found.

	Age	Have young children	Race	Marital Status	Raised in NE Ohio	Attend Pro Sports
Live Theater	55-64 most common; 65+ least common	Those without young children more common			More common among those not raised in NEO	More common among Pro Sports fans
Live Musical Performance	55-64 most common;	Those without young children more common	More common among Whites		More common among those not raised in NEO	More common among Pro Sports fans
Live Dance	55-64 most common; < 45 least common	Those without children more common	More common among Non-Whites	More common among those div./widowed/sep.		Less common among Pro Sports fans
Live children's theater	35-44 most common; 55-64 least common	Those with children much more common	More common among Non-Whites			More common among Pro Sports fans
Art Museum						More common among Pro Sports fans
Natural History Museum	35-44 most common; 55-64 least common	Those with young children much more common		More common among non-singles		More common among Pro Sports fans
Science/Tech Center/Museum	35-44 most common; 65+ least common	Those with children much more common		More common among those single or married		More common among Pro Sports fans
Nature Center/Zoo	35-44 most common (by far); 65+ least common	Those with young children much more common		More common among those married; Least those d/w/s.		More common among Pro Sports fans
Arts & Crafts Fair/Festival	45-64 most common; < 35 least common		More common among Whites	More common among those married	More common among those not raised in NEO	More common among Pro Sports fans
Ethnic Festival	35-44 most common; 65+ least common		More common among Non-Whites			More common among Pro Sports fans
Historical Program	Less common among < 35	Those without children more common	More common among Whites			

Level and Type of Participation in Arts and Cultural Activities

Type of Activities By Demographic Groups (continued) *Weighted Data (n=800)*

	Have A&C subscription/membership	Region	Education	Income	Gender
Live Theater	More common among pass/membership holders		More common among those with college degrees	More common among those with \$50K+ income	
Live Musical Performance		More common among suburb dwellers	More common among those with college degrees	More common among those with \$50K+ income	
Live Dance					
Live children's theater	More common among pass/membership holders		More common among those with at least high school degree	More common among those with \$50K+ income	More common among females
Art Museum	More common among pass/membership holders	More common among residents closer to Cleveland	More common among those with at least high school degree		
Natural History Museum		More common among City of Cleveland residents	More common among those with college degrees	More common among those with \$25K+ income	
Science/Tech Center/Museum		More common among residents closer to Akron	More common among those with college degrees	More common among those with \$75K+ income	
Nature Center/Zoo				More common among those with \$25K+ income	More common among females
Arts & Crafts Fair/Festival	More common among pass/membership holders	More common among residents of Akron and area	More common among those with college degrees	More common among those with \$25K+ income	More common among females
Ethnic Festival		More common among residents of City of Cleveland and Eastern Cleveland Suburbs			
Historical Program			More common among those with college degrees		

This information is useful to arts and cultural institutions that wish to compare their own visitor profiles against the profiles of the typical visitor to their entire genre in the area. This can identify gaps in attendance among the various groups and identify opportunities to reach new audiences. For example, if the management of a Live Musical Performance venue detects that their customers seem to be made up of mostly high income (\$75,000 +) individuals, they are missing the market among those with incomes between \$50-\$75,000.

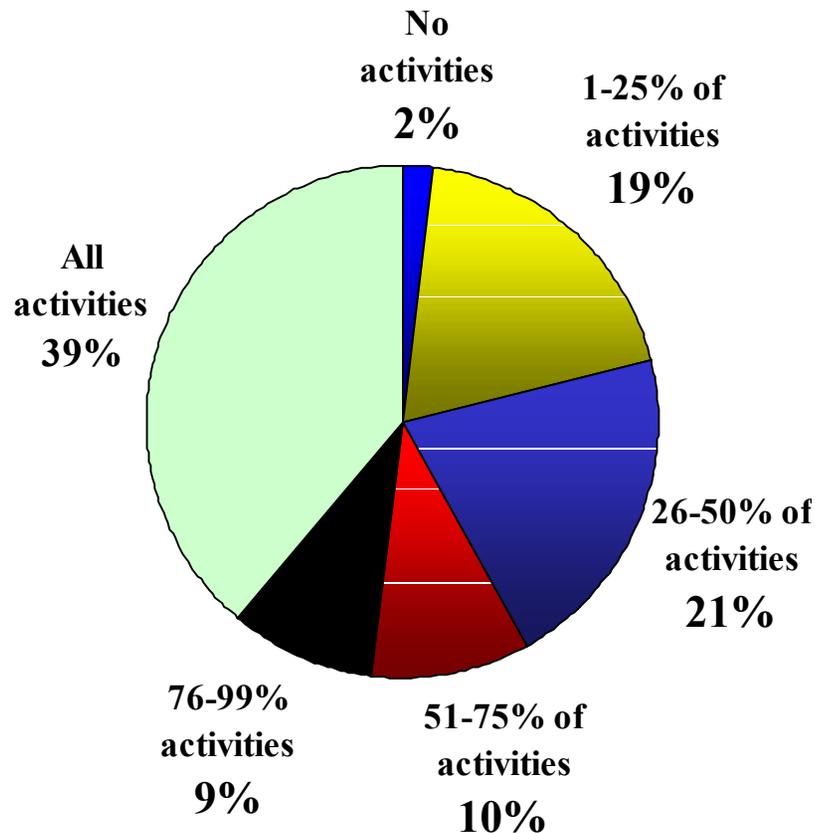
We can also glean 'macro' information from this finding by looking at the patterns of data down columns (demographic groups). For example, we can see that (previous page) almost all of the activities are more common among Sports Fans (with the exception of Live Dance), suggesting that those that have attended professional sports activities are a rich market for most arts and cultural organizations.

Level and Type of Participation in Arts and Cultural Activities

Family Specific Activities

Weighted Data (n=800)

% of Activities Attended as a Family All Respondents



- **The connection between arts and cultural activities and ‘the family’ cannot be understated.** It was extremely clear in the focus group discussions that these activities clearly play a prominent role in NE Ohioan’s lives as a way to ‘bring the family together.’ This has important implications for marketers - messages should convey a sense of family togetherness for those appropriate arts and culture activities.

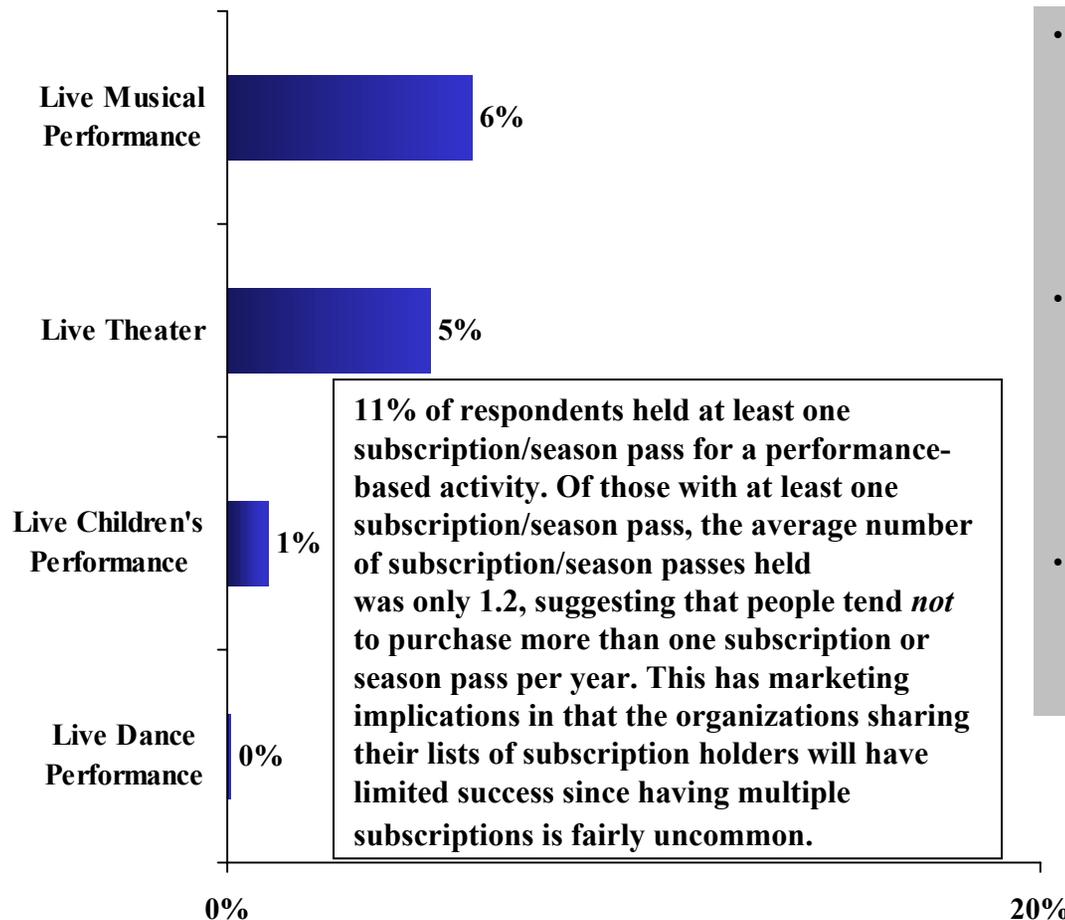
Subscriptions & Memberships

Subscriptions & Memberships

Subscription/Season Pass Holders

Weighted Data (n=400)

Percentage of Respondents



- This figure shows what percentage of our subsample (n=400) held subscriptions or season passes to each of these applicable arts and cultural activities. This is expressed as the percentage of all respondents asked about subscriptions and season pass holders (not just those that participated in these activities within the past year).
- Here we see that, overall, a small proportion of the arts and cultural patrons held a subscription or season pass in the past year. The most common type of subscription was 'live musical performances,' with 6% of the respondents reporting at that level; this is followed closely by a 5% of the respondents with subscriptions to 'live theater.'
- Subscriptions to 'live children's performances' and 'live dance performances' were extremely uncommon, reported by 1% or less of the respondents.

Subscriptions & Memberships

Subscription/Season Pass Holders

Main Reason for Subscription/Season Pass Purchases

(n=41)

	% of Respondents*
Just like performances/Want to go frequently	51%
Good/Better price	12%
Ensures that I'll go	10%
Better seats/Keep same seats	7%
To support institution	5%
Other**	12%

* Multiple responses accepted. Does not sum to 100%.

** 'Other' responses can be found in the Appendix. See Respondent Verbatim Comments, Question 12.

Main Reason for Not Purchasing Subscription/Season Pass

(among those that attended activities, (n=237))

	% of Respondents*
High cost (cannot afford entire price)	30%
No time/Too busy/Conflicting schedule	22%
Don't attend enough	10%
Too risky/Might not be able to attend on dates	9%
Prefer to pick certain shows/Shows I know I'll like	8%
Not aware of season passes available	4%
Just not that interested in activities	4%
Have small children at home	4%
No reason	3%
Like more variety/Don't want to focus on just one thing	3%
Didn't like all programs/plays	2%
Too much of a commitment/Prefer to be spontaneous	2%
Discount not great enough	1%
Other	9%
Not sure	3%

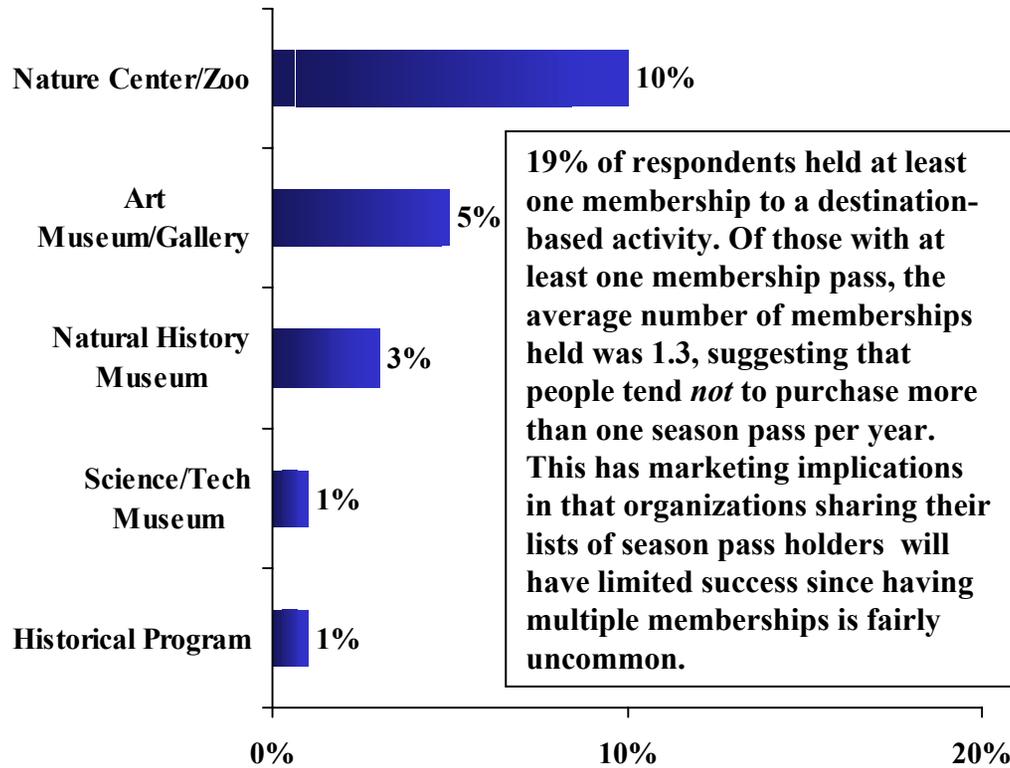
•As we would expect, those that noted 'high cost' as a barrier to subscription purchases were more commonly those with lower incomes. Also, those most likely to cite 'no time' as a barrier were those in the 35-54 age group.

Subscriptions & Memberships

Membership Holders

Weighted Data (n=400)

Percentage of Respondents



- This figure shows what percentage of our subsample (n=400) held memberships to each destination-based activities. This is expressed as the percentage of all respondents asked about memberships (not just those that participated in these activities within the past year).
- Overall, a small proportion of the arts and cultural patrons held any memberships in the past year (19%), although this is a higher level than those with performance-based subscriptions or season passes (11%).
- The most common type of membership was to ‘nature centers/zoo,’ with 10% of the respondents reporting at that level; this is followed closely by a 5% of the respondents with subscriptions to ‘arts museums or galleries.’ Specifically, almost all of those reporting memberships to nature centers/zoo reported a membership to the Cleveland Metroparks Zoo. The Cleveland Museum of Art was the most common membership to an art museum.
- Somewhat less common were memberships to a ‘natural history museum’ (3%).
- Subscriptions to ‘science & technology museums’ and ‘historical programs’ were extremely uncommon, reported by less 1% or less of the respondents.

Subscriptions & Memberships

Destination Membership Holders

Main Reason for Membership Purchases

(n=61)

	* % of Respondents
To support institution	34%
For my children/To educate children	20%
Go regularly/Is a good value	20%
Enjoy it	8%
Discounts given	7%
Newsletter/Schedule mailed to home	3%
Access to special events	2%
Hard to get tickets	2%
Other	16%

Main Reason for Not Purchasing Memberships

(among those that attended activities, n=257)

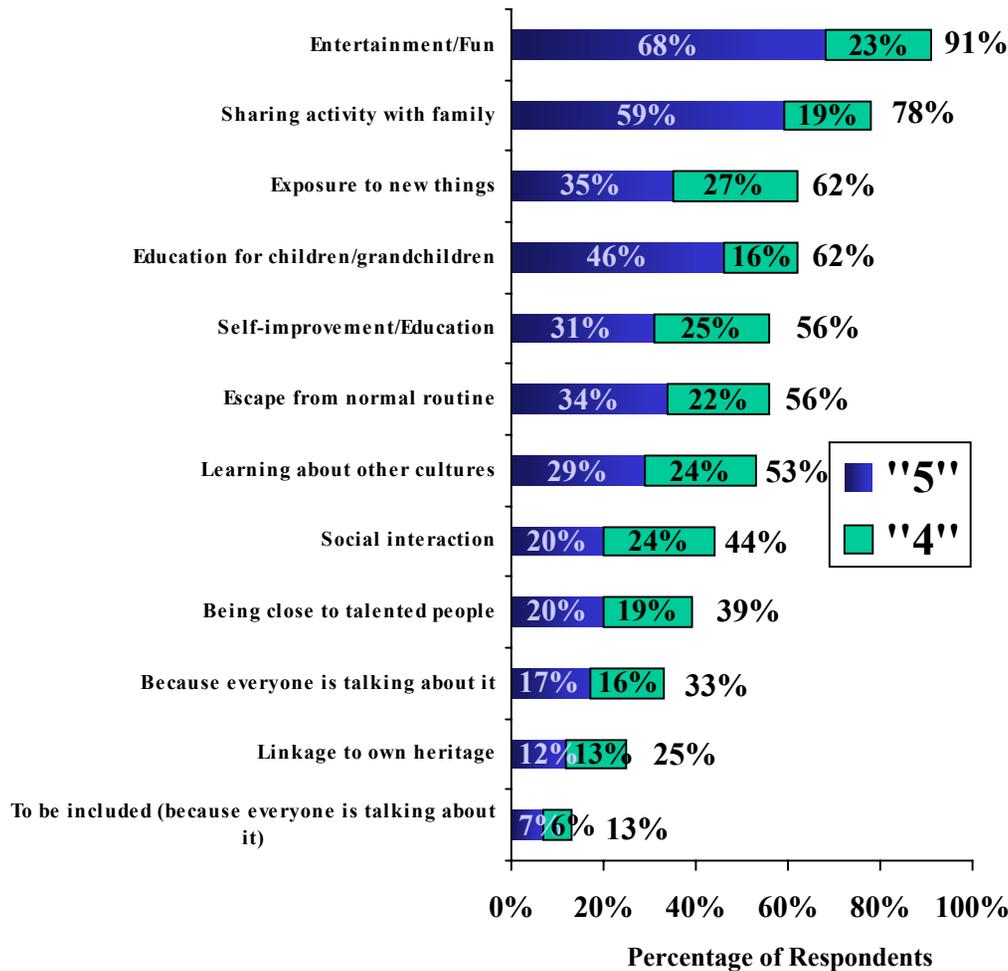
	% of Respondents*
No time/Too busy/Conflicting schedule	23%
High cost (cannot afford entire price)	20%
Don't attend enough	10%
Just not that interested in activities	10%
Not aware of season passes available	6%
No reason	6%
Just laziness	3%
Haven't thought about it	2%
Have no small children at home	1%
Like more variety/Don't want to focus on just one thing	1%
Discount not great enough	1%
Other	11%
Not sure	6%

* Multiple responses accepted. Does not sum to 100%.

Benefits of Participation in Arts and Cultural Activities

Benefits of Participation in Arts and Cultural Activities

Benefits Weighted Data (n=800)



- Much of the discussion during the eight focus groups centered around the ‘benefits’ that people obtain from participation in arts and cultural activities. Time and money are almost always limited, so if we can understand why people choose to spend their discretionary resources on arts and cultural activities, we can begin to understand how to best communicate about the arts and cultural community with current and potential patrons. That is, knowing what the perceived benefits of participation are defines what marketing messages we should use to best get the attention and interest of customers.
- In the survey, respondents were asked to rate each of 12 statements which represented benefits we derived from previous research (including our own focus groups). Respondents used a 5-point scale, where ‘5’ meant that the statement was a major reason for participating, and ‘1’ meant that it has ‘nothing at all to do with why you attend’ arts and cultural activities or events. This figure shows the ‘top-2-box’ scores (% that said either a ‘5’ or a ‘4’).

Continued...

Benefits of Participation in Arts and Cultural Activities

Most Common Benefits-Strongest Marketing Messages

- **Entertainment & Fun** (91% rated a top-two-box score): Focus group and survey participants alike were in full agreement that a major reason, if not *the* major reason for participating in arts and cultural activities is simply for entertainment and fun. Those of us charged with communicating with existing and potential customers should not forget that strong desire in all of us to be entertained. The challenge facing arts and cultural marketers is to communicate this sense of fun without also degrading the perception of quality of each activity.
- **Sharing activity with family** (78%): We were surprised by this finding, both in the focus groups and the survey. The unique ability of arts and cultural activities to bring families together is an important benefit which should not be overlooked in marketing messages.
- **Exposure to new things; Self-improvement & education** (62%/56%): This was a rather strong theme in the focus groups which was corroborated by the survey results. Respondents described how arts and cultural activities forced them to grow or mature, to see things in different ways, to improve themselves at least a little bit. So, although people are very clear in their requirement that arts and cultural activities are entertaining and fun, they also see and want the self-improvement role that these activities play in people's lives. This is a unique quality that arts and cultural activities bring to consumers.
- **Education for children/grandchildren** (62%) : In a similar light, those with children or grandchildren were very adamant about the importance of exposing their children or grandchildren to the arts and cultural experiences. Very often people attributed some family member doing the same for them when they were young (discussed further on page 77), and they believed that it was their responsibility to do the same for their own. People believe that this sort of exposure at a young age 1) develops a more healthy appreciation for art and culture, 2) provides linkages for children to their own ethnic heritage, and 3) helps children understand other cultures, thereby developing greater tolerance for those of other backgrounds and cultures.

The exposure to anything new is so exciting.

Akron Area Focus Group Participant

My mother made it a point ...I grew up developmentally saying I like change. I like to investigate new things. I like to find out what's going on that's different. And so instead of just growing up on Rap, and saying I just like Rap artists, I can go into pop, classical, rock and have an appreciation for all of those.

Cleveland East Side Focus Group Participant

Just to learn something different...whether its relevant, irrelevant..it doesn't matter. That's one thing my kids have picked up on. They're eclectic, they listen to everything. It's a safe way of teaching them.

SE Cuyahoga County Focus Group Participant

Benefits of Participation in Arts and Cultural Activities

Moderately Common Benefits

Escape from normal routine (56%): Just over half of the respondents earmarked this benefit as a key reason they participate in arts and cultural activities or events. A moderate number of focus group participants spoke of the ‘escape’ value related to art and cultural activities.

Anytime where you can kind of lose yourself in the play.
SE Cuyahoga County Focus Group Participant

Learning about other cultures (53%): This is a somewhat important theme in that it was noted as an important benefit to half of the survey participants and was discussed often as a benefit by focus group participants. Note the difference between this statement and one discussed on the next page (‘linkages to *own* heritage’) - tagged as important by far fewer survey participants. ‘Learning about other cultures’ is related to the ‘self-improvement theme’ discussed previously which was so important to people, but it is special because it teaches specifically about other cultures, a topic which is inherently interesting and worthwhile to many people. This finding has important implications for marketing communications of arts and cultural activities, in that it changes the ‘spin’ we should put on any activity or event which has an ethnic component to it. To use an extreme example, this finding would suggest that a marketing campaign for an opera could be more successful if it also communicated the Italian (or German, etc.) ethnic ties that the experience provides.

Art and culture are things that tell me about myself and the world or where we’re at...that could run the gamut from the music of today to banjo music to things at the arts expo where people are making simple crafts...just things that are part of the fabric we are all made up of.

Akron Area Focus Group Participant

Social interaction (44%) : This benefit was stressed by less than half of the respondents, however it was significantly more important to Non-White survey respondents (58% top-2-box score). This suggests that as a marketing message it would not be as effective as other messages (see above), but it would resonate more effectively within the Non-White community.

Being close to talented people (39%) : This sentiment was expressed by only a few focus group participants, and only about one-third of the survey participants felt this was an important benefit.

Benefits of Participation in Arts and Cultural Activities

Less Common Benefits - Weakest Marketing Messages

Because everyone is talking about it (33%): Although ‘word-of-mouth’ was a common way that people learned about upcoming arts and cultural events, the significance of ‘people talking about’ an event does not seem to be a strong impetus for NE Ohioans to attend an event. The sentiments we heard expressed in focus groups were that people will ‘decide for themselves’ if they would like something or not. This is in-line with the ‘Midwestern practicality’ of our sample base - Midwesterners are typically not stirred to action by ‘hype’ and they are comfortable and secure with their own tastes. This, of course, has implications for marketing messages - advertisements and posters should not stress seeing an event because ‘everyone is talking about it.’ This message will have little impact (will not resonate with many people) and at worst, it is likely to be viewed with suspicion.

Linkage to own heritage (25%): On the previous page we discussed the benefit of ‘learning about other cultures,’ which was a moderately strong theme in both the focus group and survey results. Another possible benefit related to ethnicity is links to people’s *own* heritage. For the overall group of respondents, this ethnic benefit was relatively weak in that few people believed they participated in arts and cultural activities for this reason. This is different, however, for the Non-White participants that we surveyed (in focus groups and on the telephone). They had very strong feelings about providing linkages to their own heritage for their children or grandchildren. This was especially true for African Americans, Native American Indians, and those of Hispanic/Latino descent.

To be included (because everyone is talking about it (13%): Just as NE Ohioans appear to not be swayed by what activities ‘everyone is talking about,’ they carry that sentiment one step farther in that they do not feel compelled to attend an activity or event just ‘to be included.’ That is, NE Ohioans do not seem to believe they are ‘left out’ if they did not see or attend a much-talked-about event. Again, this seems to be in line with the Midwestern practicality that we often see in studies of Ohio consumers.

When we were little they took us to Chinese cultural events...just to expose us to our own heritage. They wanted us to be open to everything. It helped me be a better person with everybody in general.

Asian American
Focus Group
Participant

Benefits of Participation in Arts and Cultural Activities

Demographic Patterns of Perceived Benefits

Weighted Data (n=800)

This figure (continued on the following page) highlights demographic differences for each potential benefit. For example, ‘exposure to new things’ was a more important benefit obtained for arts and cultural participation for those aged 45 to 54, and least important among seniors. Targeted marketing which focuses on the 45 to 54 set will benefit more from a marketing message which communicates ‘exposure to new things’ than one which focuses on increasing participation among seniors. We should emphasize that in almost every case, the differences among sample groups are not very large (in the 7%-15% point range). When large differences occurred, they are noted. Cells were left empty when no significant difference within that demographic group was found.

	Age	Have young children	Race	Marital Status	Attend Pro Sports
Entertainment/Fun					
Sharing activity with family	More so for those age 35-44; least so for those over 65	More so for those with younger children		More so for those who are currently married	More so among sports fans
Exposure to new things	More so for those age 45-54; least so for those over 65				
Education for children/grandchildren	More so for those age 35-44	More so for those with younger children	More so for Non-Whites	More so for those that have been married	
Self-improvement/Education			More so for Non-Whites	More so for those not married	
Escape from normal routine	More so for those under age 65				
Learning about other cultures			More so for Non-Whites	More so for those that have been married	More so among sports attendees
Social interaction			More so for Non-Whites	More so for those divorced/widowed/separated	
Being close to talented people				More so for those never married	
Because everyone is talking about it			More so for Non-Whites	More so for those divorced/widowed/separated	More so for non-sports attendees
Linkage to own heritage			More so for Non-Whites	More so for singles	
To be included (because everyone is talking about it)			More so for Non-Whites		

Benefits of Participation in Arts and Cultural Activities

Demographic Patterns of Perceived Benefits

Weighted Data (n=800)

	Region	Education	Income	Gender
Entertainment/Fun				More so for females
Sharing activity with family			More so for those with higher incomes	More so for females
Exposure to new things				
Education for children/grandchildren	More so those in City of Cleveland, and Cleveland West Suburbs	More so for those with less education	More so for those with lower incomes	
Self-improvement/Education				More so for females
Escape from normal routine			More so for those with lower incomes	More so for females
Learning about other cultures	More so among those in City of Cleveland		More so for those with lower incomes	
Social interaction	More so for those in the City of Cleveland		More so for those with lower incomes	
Being close to talented people			More so for those with higher incomes	
Because everyone is talking about it		More so for those with no college education	More so for those without very high incomes (\$75K +)	More so for females
Linkage to own heritage	More so for those in City of Cleveland, and Cleveland East Suburbs	More so for those with no college education	More so for those with lower incomes	
To be included (because everyone is talking about it)		More so for those with no college education	More so for those with lower incomes	More so for females

Benefits of Participation in Arts and Cultural Activities

Perceived Benefits By Level of Arts and Cultural Use *Weighted Data (n=800)*

	Light Users	Medium Users	Heavy Users	Very Heavy Users
Entertainment or fun	4.37	4.59	4.66	4.64
Escape from your normal routine or daily concerns	3.70	3.63	3.51	3.44
Self-improvement or education for yourself	3.46	3.61	3.71	3.87
Education or enrichment for your children or grandchildren	3.13	3.66	3.65	3.39
Exposure to things you've never seen or heard before	3.54	3.83	3.92	3.84
Learning about other cultures	3.06	3.40	3.65	4.09
Links to your ethnic or cultural background or ancestors	2.18	2.47	2.60	2.70
Being close to the work of talented people/artists	2.80	2.92	3.35	3.25
Social interaction with other attendees	2.90	3.02	3.55	3.41
Sharing an activity with your family	4.01	4.04	4.19	4.24
Going because you know it is good since everyone is talking about it	2.76	2.96	2.77	2.24
Going because everyone is talking about it and you want to be included	2.00	2.06	2.13	1.59

A major objective of this study was to determine what sorts of things can be done to increase the level of arts and cultural participation of NE Ohioans. Previous research has shown that light-, medium- and heavy-level users differ in their attitudes and behaviors regarding arts and cultural activities. Knowing what most differentiates one level of user from higher-level users can help us understand what we have to do in order to increase that person's level of participation. Here we present the mean importance scores (based on the 1 to 5, low-high, scale) for the various benefits for the four levels of arts and cultural participation we examined in this study. Arrows (up or down) signify where the statistical difference begins among the four levels of use groups. For example, the belief that 'entertainment or fun' is an important benefit from attending arts and cultural activities is statistically lower for the 'light users' than the other three groups. 'Self-improvement or education for yourself' is about the same for light and medium-level users, but a more important reason for heavy and very heavy users.

On the next page we summarize and discuss these findings.

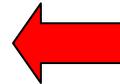
Benefits of Participation in Arts and Cultural Activities

Perceived Benefits By Level of Arts and Cultural Use *Weighted Data (n=800)*

Benefits which were rated less important for:

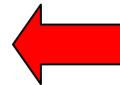
Low Level Users (vs. Medium, Heavy, & Very Heavy Users)

- Entertainment/Fun
- Self-improvement/Education
- Education for children/grandchildren
- Exposure to new things
- Learning about other cultures
- Linkage to own heritage



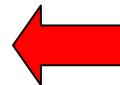
Medium Level Users (vs. Heavy, & Very Heavy Users)

- Learning about other cultures
- Being close to talented people
- Social interaction



Heavy Users (vs. Very Heavy Users)

- Learning about other cultures
- Because everyone is talking about it
- To be included (because everyone is talking about it)



The assumption here is that medium, heavy and very heavy users perceive these benefits at higher levels, which are the major attitudinal differences between low level users and medium, heavy, and very heavy arts and cultural users. These are messages expected to have less appeal or credibility with the lowest level users.

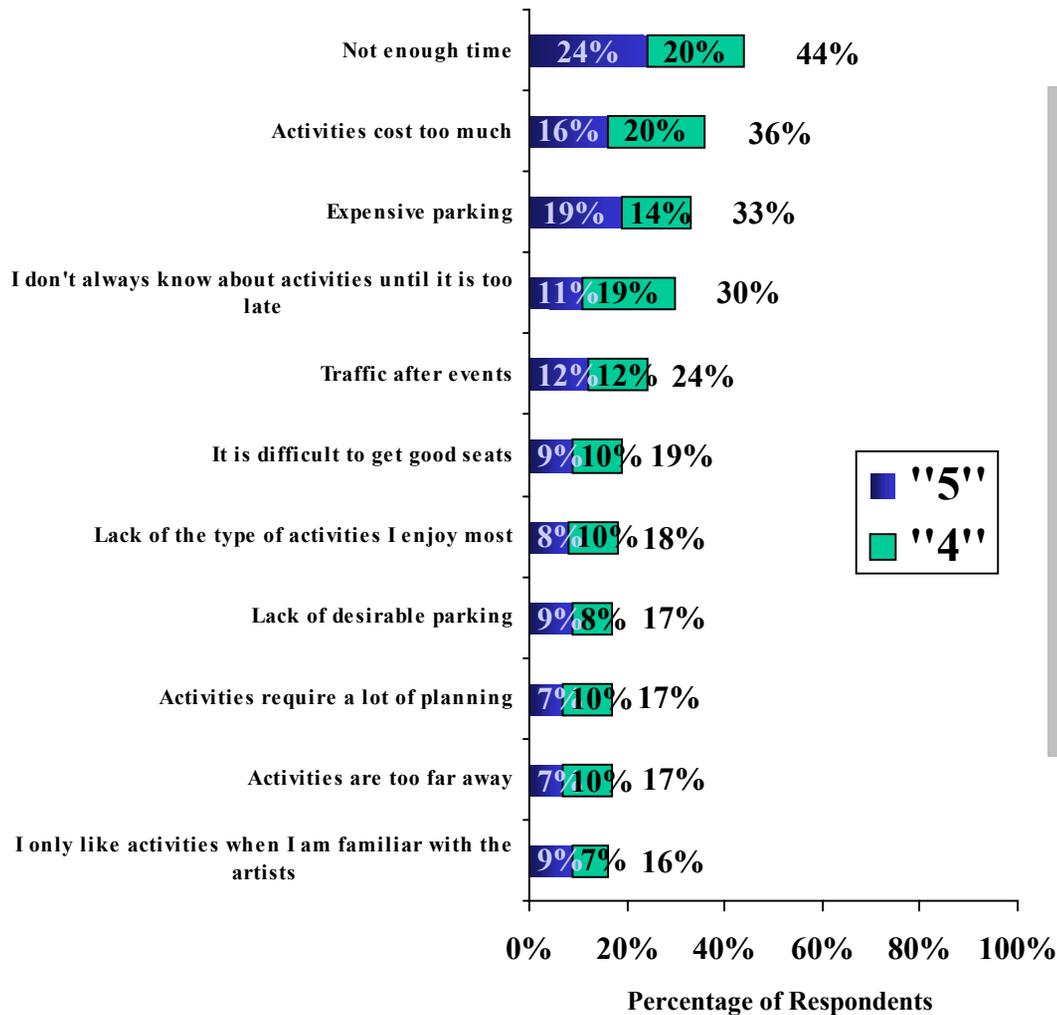
The assumption here is that heavy and very heavy users perceive these benefits at higher levels, which are the major attitudinal differences between medium and heavy/very heavy arts and cultural users. These are messages expected to have less appeal or credibility with the medium level users, as opposed to heavier users.

The assumption here is that very heavy users perceive these benefits at higher levels, which are the major attitudinal differences between heavy and very heavy arts and cultural users. These are messages expected to have less appeal or credibility with the heavy level users, as opposed to the very heavy users.

Barriers to Participation in Arts and Cultural Activities

Barriers to Participation in Arts and Cultural Activities

Top 11 (of 22) Barriers to Participation Weighted Data (n=800)

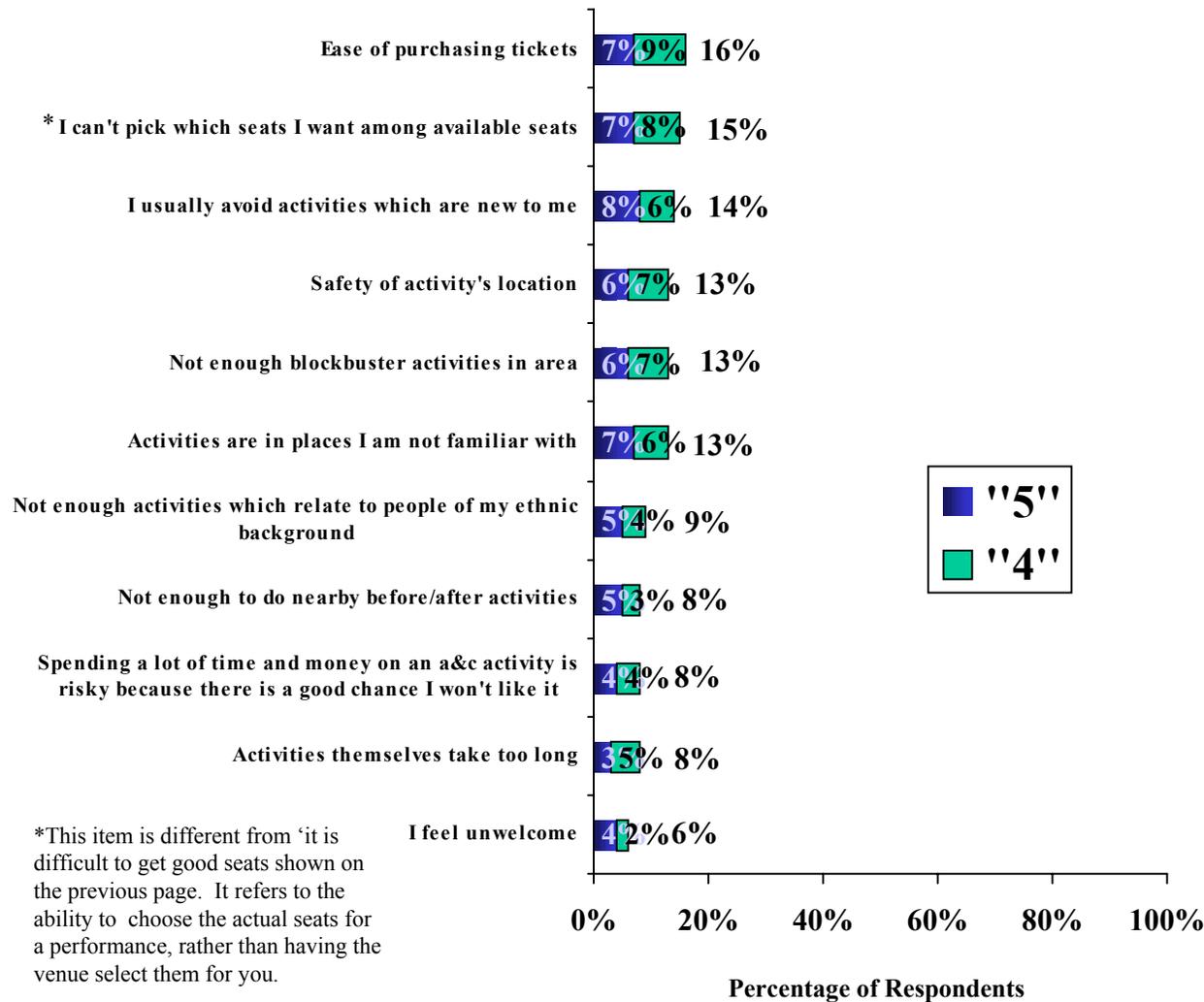


- While much of the discussion during the eight focus groups centered around the 'benefits' of participating in arts and cultural activities, even more discussion focused on why people *don't* participate in arts and cultural activities. This information can be very valuable to those charged with programming, providing services, and marketing arts and cultural activities in our region.
- In the survey, respondents were asked to rate each of 22 statements which represented potential barriers derived from previous research (including our own focus groups). Respondents used a 5-point scale, where '5' means that the statement 'stops people from attending' arts and cultural activities, and a '1' means that it 'isn't ever a consideration when deciding which activities to attend.' This figure, which is continued on the following page, shows the 'top-2-box' scores (% that said either a '5' or a '4'), and therefore ranks the barriers from the greatest (top) to the weakest (bottom) barriers.

Continued...

Barriers to Participation in Arts and Cultural Activities

Bottom 11 (of 22) Barriers to Participation Weighted Data (n=800)



Continued...

Barriers to Participation in Arts and Cultural Activities

Most Common Barriers

Not enough time (44% rated as a major or somewhat major barrier): Numerous studies regarding consumer behavior and leisure-time activities cite the ‘lack of time’ as a barrier to participation. This study is no different. However, NE Ohioans, as a group, clearly are spending a fair amount of time participating in arts and cultural activities - 87% of them have enjoyed at least one activity within the past year, and of those that have, on average they have participated in about 13 activities. So, we can conclude the the ‘lack of time’ is indeed a *bona fide* barrier to people participating in as many activities as they would like (especially those with young children); however, this study suggests that NE Ohioans do allocate a lot of their free time to arts and cultural events.

Activities cost too much (36%): Cost has an influence on almost every purchase decision, and arts and cultural activities purchases are no different. The burning question here, however, does ‘high cost’ turn too many potential customers away? Are activities priced so high that much of the market is priced-out? Is access to arts and cultural activities denied to a great portion of NE Ohioans because of cost? The preponderance of evidence from our study suggests that the answer to these questions is no - the issue is not so simple as that prices are too high. The issue instead, is ‘value,’ - NE Ohioans are willing to pay ticket prices *if* they feel they are getting a good value for their dollar. Numerous focus group participants reminded us that if an activity or event is appealing enough, consumers will ‘find the money’ to go.

What is their definition of a good value? This very important question is discussed below. It is related to fairness and good service - two factors completely within the control of arts and cultural institutions.

Before we continue with this topic, we need to highlight a finding that is not apparent from any direct questioning within either the focus groups or the telephone survey, and that is that arts and cultural consumers in NE Ohio view the arts and cultural community as a single entity. That is, while this community is actually made up of hundreds of organizations - of every size and type - in the consumer’s mind, this community is an integrated unit. What one does reflects on the entire community, and consumers expect the arts and cultural community to act as a unit to provide the best possible experiences for arts and cultural fans.

The museums ought to be working with the Botanical Gardens or something. The Zoo ought to be working with the history museum.they (arts and cultural organizations) ought to be working together. I would like to see a play at the Botanical Gardens...that would kill two birds with one stone by fulfilling your needs in that there’d be a place to walk around after the play.

Cleveland East Side
Group Participant

Barriers to Participation in Arts and Cultural Activities

Most Common Barriers

Expensive parking (33%): This is a surprising finding - one third of the survey respondents believed that ‘expensive parking’ was a barrier to increased participation in arts and cultural activities in our region. This topic warrants close examination, because the issue is more than just the monetary cost of parking near activities. In our focus groups, respondents from almost every group complained about unfair parking prices during special events (mostly referring to ‘downtown’ parking). Although parking prices are a fraction of ticket prices, these arts patrons were bitter about this issue, and it reflected on their perceptions about arts and cultural institutions. They had difficulty separating the arts and cultural institutions from businesses which operate parking facilities (although they did understand the difference when pushed). The point is they believed they are gouged paying \$20 for parking when the cost is ‘normally’ only \$6 or \$7, and they believed that the arts and cultural institutions should help defray some of this cost. Their demands for ‘discounted’ parking were not great (a \$2 coupon was frequently suggested); they simply felt that it was **unfair** and if arts and cultural institutions wanted their business, they should address this issue.

I don't always know about activities until it is too late (30%): Another common complaint was that potential customers don't hear about an activity until it is either sold-out, or history. Respondents in our focus group related stories of reading about a desirable event in the newspaper that occurred the previous night. In discussions about sources of information regarding upcoming arts and cultural activities, most participants cited several different sources and complained that there is no ‘centralized source’ for *all* activities. The general sentiment was that the information is ‘out there’ but that you really have to ‘know where to look’ and be willing to ‘read the fine print’ in order to know about all the community has to offer. This suggests that only the most motivated (or “lucky”) consumers learn about much of what is being offered, and that much information misses the more ‘passive’ consumer all together. In sum, we can conclude that there is a need for a more cohesive communications venue for reaching all potential consumers of arts and cultural activities in a way that consumers do not need to be very proactive in order to learn about events. Understanding that advertising is expensive, the finding suggests that the non-profit arts and cultural community needs to explore avenues for communicating upcoming events to potential customers in a timely yet cost-effective way.

In the back of my mind I'm thinking... 'Boy, I'm being gouged by these people.' I realize that downtown these are privately owned lots and there's not a lot you can do. There's a lot of places that now give you (a parking discount). If you go to Fat Fish Blue, they validate. It's like \$2 to park.

Cleveland East Side
Focus Group Participant

For free things, you have to read and read.

African American
Focus Group
Participant

If you don't know what you're looking for you can't really find anything that will just jump out at you. But if you know what you're looking for I think the Internet is a very good way.

Cleveland East Side
Focus Group Participant

Barriers to Participation in Arts and Cultural Activities

Most Common Barriers

Traffic after events (24%): This is another barrier that arts and cultural institutions can have an impact on with some effort. One-in-five survey respondents reported their fear of heavy traffic after events prevented them from attending certain events. Severe traffic jams are rare in NE Ohio - but focus group participants recounted stories of sitting in traffic for up to one hour after events. This focused mostly on downtown Cleveland events (especially when there were multiple simultaneous events), but other venues were cited as being problematic also (specifically Blossom). These consumers believed that the arts and cultural institutions fail to fulfill their responsibility to manage traffic *after* events, and this reflects on consumers' opinions about the arts and cultural institutional community as a whole.

It is difficult to get good seats (19%): While this was reported as a barrier by only one-in-five survey respondents, it was an issue discussed heavily in the focus groups. The problem appeared to be, again, with **fairness**. Many focus group participants lamented over the complete lack of access to the 'best seats' for the 'average person.' That is, several people recounted stories of being the 'first in line' for tickets for a performance that was highly desirable for them, yet the only available seats were 'several rows back.' Focus group participants perceived that 'radio stations,' 'corporations,' 'brokers,' and in some cases 'subscribers,' were the only entities with access to the better seats. They saw this as flatly unfair. They saw themselves as the 'real fans' who were most deserving of access to those good seats (which they were willing to pay for); proof that the best seats were not going to 'real fans' but rather to the 'radio stations' and 'corporations' was the frequently empty seats in the first few rows. Therefore, in several focus group participants' eyes, the core audience (themselves) are denied access to the highly desirable seats yet they are frequently wasted by those that really don't care about attending. This perception adds to the somewhat bitter impression of the arts and cultural institutions as a whole that we discussed above in regards to expensive parking & post-event traffic; their impression is that the arts and cultural institutions or venues should be more concerned about the average customer's satisfaction.

(Regarding traffic after events) They want you to come down and spend your money and obviously some of those taxes go to the City, but they're not helping the customer to make it easier.

Cleveland West Side Focus
Group Participant

There used to be a time...if you found out about the concert early enough and if you got there early enough to purchase a ticket, then you got a good seat. But it seems now...the first 20 rows up front are taken up by some corporation or radio station. You can still pay that \$100 or \$200..

Cleveland East Side Focus
Group Participant

My daughter was in the Nutcracker...and we were going to get tickets since my kid was in it. I thought I was going to be part of the elite for a change...but I was still a second class citizen. I had to use binoculars to see my kid in the Nutcracker.

Cleveland East Side
Focus Group Participant

Barriers to Participation in Arts and Cultural Activities

Somewhat Common Barriers

Lack of the type of activities I enjoy most (18%): The diverse tastes for arts and cultural activities among NE Ohioans was very clear in our focus groups. Our groups included auto show attendees, jazz enthusiasts, and orchestra subscribers. It seemed that no type of fan was left out of our groups. Given this large range of tastes, we would expect that at least *some* people would be left wanting for the kind of activity they like best, and this is what we found in our survey (18%). However, the overriding sentiment from both the survey and the focus groups was that NE Ohio was actually an extremely rich arts and cultural region and that we are very lucky to live in a place with so much to offer. This corroborates a 2001 study conducted by the Greater Cleveland Growth Association of local business leaders, among whom ‘culture and the arts received higher marks than...any other quality-of-life attribute’ in Greater Cleveland.

In the present study, there were two glaring gaps, however, and those were 1) a perceived lack of ethnic activities, specifically for African American, Native American Indian, and Hispanic/Latino consumers; and, 2) the regret over the loss of the Cleveland Ballet. **In sum, however, we do not see any great need for expansion of arts and cultural programming in our region, with the exception of these two gaps.**

Lack of desirable parking (17%): Some NE Ohioans appear to be rather particular about parking. We discussed the complaints over costly parking earlier, but this issue has more to do with convenience. One-in-five of the surveyed arts patrons do not like to have to walk too far. There is little arts and cultural institutions can do without great expense to alleviate this problem, other than ensure that signage is more than adequate. Fortunately, it is not one of the major barriers to participation. Venues that do have very convenient parking (especially free parking) would benefit, however, from promoting that fact along with specific event promotions.

Activities require a lot of planning (17%): We learned in our focus groups that most people prefer to attend arts and cultural activities on a fairly spontaneous basis. And, in our region, it appears that this is easy to do for most - that is, there are many activities available on almost a continuous basis, they are perceived as being within a reasonable distance to most of our target audience, and the venues are viewed as accessible by car.

Activities are too far away (17%): In that same light, only one-in-six survey respondents believed that an activity being ‘too far away’ prevented them from attending.

Barriers to Participation in Arts and Cultural Activities

Less Common Barriers

I only like activities when I am familiar with the artists (16%): When asked about their preference for ‘national’ versus ‘local’ artists, focus group participants were mixed in their preferences, although the slight majority preferred artists of ‘national’ prominence over ‘local’ ones. However, in the survey we see that only a minority of arts consumers limit themselves to activities where they are familiar with the artists, paving the way for ‘home grown’ artists and performers to succeed in this market.

Ease of purchasing tickets (16%): This was noted as a barrier by only one-in-six survey participants, however many focus group participants did tell stories of difficulties in purchasing tickets. These stories mainly revolved around poorly trained ticketing agents at telephone centers, or establishments not accepting cash, or difficulty in ‘getting through’ to ticketing agents over the phone.

I can't pick which seats I want among available seats (14%): We discussed previously how agitated some arts and cultural consumers are regarding their access to the ‘best seats’ for performances. We would expect, therefore, the lack of exact seating information at the time of ticket purchase would be a problem if this were a common practice for performance venues. Because this was mentioned as a barrier by few survey participants, however, we can conclude this is not a weakness for the NE Ohio arts & culture community as a whole.

Safety of activity's location (13%): This was only an issue regarding ‘downtown’ Cleveland or Akron activities. It was not a major barrier according to most survey participants, nor for focus group participants. The only groups where it was discussed with any voracity was the Cleveland West Suburbs group and the African American group.

I usually avoid activities which are new to me (14%): Focus group participants were clear in their desire to be exposed to new things via the arts and cultural activities they attend, and most survey participants also saw this as a benefit. Therefore, it is not too surprising that survey participants, as a group, rejected the notion they usually avoid activities which are new to them. However, unfamiliarity is always a barrier to the purchase of all products and services, and arts and cultural institutions will be well-served by marketing their events in a way and with language that is most familiar to NE Ohioans: as much as possible, relate to their favorite activities - the zoo, professional sports, live musical performances, and arts & crafts fairs.

The tickets were all printed, and here's me with my credit card. Cash only. I had to run outside to the ATM.
SE Cuyahoga County Group Participant

Barriers to Participation in Arts and Cultural Activities

Less Common Barriers

Not enough blockbuster activities in area (13%): It was clear from the focus groups that NE Ohioans are very open to arts and cultural activities which are *not* 'blockbuster' in nature. Understanding that would make us believe this statement (*not enough blockbuster activities in area*) would not be a barrier for our group of survey participants, which is what we found. It also suggests that NE Ohioans perceive this market does get included in national tours of 'blockbuster' events (concerts, Broadway musicals, etc.). We can conclude that those charged with regional programming do not face the challenge of raising the prominence level of activities in the region - in this regard they appear to be satisfying the arts & culture patrons already.

Activities are in places I am not familiar with (13%): There was some discussion in focus groups that advertisements often fail to provide sufficient location information (e.g. exact addresses, maps), leading to the need for potential customers to seek location information directly. This was seen as a 'bother' for some, and not so much as a barrier. However, arts and cultural institutions should take care to not assume that all readers of advertisements are aware of the venue location; it is well-known that Cleveland is 'divided by the river' and the region is comprised of seven distinct counties. People are notoriously unfamiliar with the side of the river or the counties they don't live in. Institutions, regardless of location make it less likely that those unfamiliar with the seven county region will attend their event if they don't make it as easy as possible for those people to find them.

The following potential barriers were rated as either a '5' or a '4' by fewer than 10% of our participants:

Not enough activities which relate to people of my ethnic background (9%);

Not enough to do nearby before/after activities (8%);

Although few survey participants viewed this as a barrier to their participation, there was some complaining by focus group participants that it was difficult to 'make a night of it' for many local arts and cultural events (especially Playhouse Square).

Activities themselves take too long (7%);

Again, while this was not viewed as a major barrier by our survey sample, as a group, there was some frustration expressed over the late hour of many weekday evening events which do not end until close to midnight.

Spending a lot of time and money on an art & culture activity is risky because there is a good chance I won't like it (8%);

I feel unwelcome (6%).

Sometimes I think there is an assumption that everyone is familiar with everything in the area, and you're not....I think it makes it much more difficult. I find sometimes I need time to plan in addition to finding the time to go to things.

Akron Area Focus Group Participant

You go down to the Playhouse, and that's it. In any other city, after you come out of the theater, you can walk around and stores are open. There's something to do ...to savor the moment. (In Cleveland) When you go downtown, you're there and out. And that's it.

Cleveland East Side Focus Group Participant

Barriers to Participation in Arts and Cultural Activities

Perceived Barriers By Level of Arts and Cultural Use Weighted Data (n=800)

	Light Users	Medium Users	Heavy Users	Very Heavy Users
A lack of the type of activities I enjoy most	2.38	2.48 ↓	2.20 ↓	1.81
There are not enough activities which relate to people of my ethnic background	1.70	1.67	1.77 ↓	1.34
Lack of desirable parking	2.26	2.20	2.29	1.98
Expensive parking	2.79	2.85	2.85 ↓	2.54
Traffic after events	2.40	2.56 ↓	2.27 ↓	1.90
Activities are too far away	2.28	2.28 ↓	2.14 ↓	1.90
Activities cost too much	3.11	3.14 ↓	2.84	2.77
Not enough time to attend activities	3.06	3.36	3.14	3.03
Activities require a lot of planning	2.44	2.44	2.33 ↓	2.08
Activities are in places I am not familiar with	1.98	2.10	2.11	1.86
I am not sure of the safety of the activity's location	2.05	2.21 ↓	1.93	1.84

Here we continue our examination of the differences in attitudes among the four levels of arts and cultural participation. We present the mean importance scores (based on the 1 to 5, low-high, scale) for the various barriers for the four levels of arts and cultural participation. Arrows (up or down) signify where the statistical difference begins among the four levels of use groups. For example, the belief that there is a 'lack of activities I enjoy most' is an important barrier which distinguishes medium users from heavy users, and heavy users from very heavy users. 'Activities cost too much' appears to be a greater barrier for light or medium users, as opposed to heavy or very heavy users. Therefore, a change in pricing strategy would be more likely to increase the level of activity of the low or medium level users, but not the heavy users.

Continued...

Barriers to Participation in Arts and Cultural Activities

Perceived Barriers By Level of Arts and Cultural Use *Weighted Data (n=800)*

...Continued

	Light Users	Medium Users	Heavy Users	Very Heavy Users
I don't always know about activities until it is too late	2.82	2.87	2.74	2.46
The activities themselves take too long	1.83	1.86	1.81	1.56
I usually avoid activities that are new to me, for example, abstract art, opera, or classical music.	2.17	2.06	1.90	1.74
There are not enough 'must see' or 'blockbuster' activities here in the Cleveland area	2.05	2.02	2.00	1.40
I feel unwelcome	1.32	1.41	1.41	1.29
I believe that spending a lot of time and money on an art or culture activity is risky because there is a good chance I won't like it	1.85	1.96	1.69	1.28
It is difficult to get good seats	2.38	2.38	2.24	2.05
I can't pick which seats I want among available seats	2.09	2.16	2.06	1.78
Ease of purchasing tickets	2.20	2.19	2.21	1.98
I only like to attend arts and culture activities when I am familiar with the artists	2.23	2.25	2.09	1.70
There are not enough things to do nearby before and after activities to make it worth my time and effort	1.75	1.85	1.79	1.49

On the next page we summarize and discuss these findings.

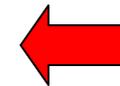
Barriers to Participation in Arts and Cultural Activities

Perceived Barriers By Level of Arts and Cultural Use *Weighted Data (n=800)*

Barriers which were rated higher for:

Medium Level Users (vs. Heavy, & Very Heavy Users)

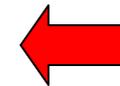
- A lack of the type of activities I enjoy most
- Traffic after events
- Activities cost too much
- Activities are too far away
- Safety of activity's location
- I usually avoid activities which are new to me
- It is difficult to get good seats



The assumption here is that heavy and very heavy users have overcome these barriers, which are the major attitudinal differences between medium level and heavy/very heavy arts and cultural users.

Heavy Users (vs. Very Heavy Users)

- A lack of the type of activities I enjoy most
- Not enough activities which relate to people of my ethnic background
- Expensive parking
- Traffic after events
- Activities are too far away
- Activities require a lot of planning
- I don't always know about activities until it is too late
- Activities themselves take too long
- Not enough blockbuster activities in area
- Not enough to do nearby before/after activities
- I only like activities when I am familiar with the artists
- Spending a lot of time and money on an art & culture activity is risky because there is a good chance I won't like it



The assumption here is that very heavy users have overcome these barriers, which are the major attitudinal differences between heavy and very heavy arts and cultural users.

Barriers to Participation in Arts and Cultural Activities

Demographic Patterns of Perceived Barriers Weighted Data (n=800)

This figure (continued on the following page) highlights demographic differences for each potential barrier. We should emphasize that in almost every case, the differences among sample groups are not very large (in the 7%-15% point range). When large differences occurred, they are noted. Cells were left empty when no significant difference within that demographic group was found. Organizations can operationalize these data by ensuring that they minimize the barrier if it is shown to be significant for one of their target consumer groups.

	Age	Have young children	Race	Marital Status	Raised in NE Ohio	Attend Pro Sports
Not enough time	More so for those age 35-44, least so for those over age 55	More so for those with children	More so for Whites	More so for those married		
Activities cost too much	More so for those under age 55	More so for those with young children	More so for Whites	More so for those married		
Expensive parking			More so for Non-Whites		More so for those raised in NE Ohio	More so for sports attendees.
I don't always know about activities until it is too late	More so for those under age 55					
It is difficult to get good seats					More so for those raised in NE Ohio	
Lack of desirable parking			More so for Non-Whites			
Lack of the type of activities I enjoy most	More so for those under age 35	More so for those with young children		More so for those never married		
Activities require a lot of planning	More so for those under age 45	More so for those with young children		More so for those married		
Activities are too far away			More so for Non-Whites			Least so for sports attendees.
I only like activities when I am familiar with the artists		More so for those with young children				
I usually avoid activities which are new to me				More so for those currently married		
Safety of activity's location			More so for Non-Whites			
Not enough blockbuster activities in area			More so for Non-Whites	More so for those never married; least for d/w/s		
Activities are in places I am not familiar with			More so for Non-Whites			
Not enough activities which relate to people of my ethnic background	More so for those under age 35		Much more so for Non-Whites	More so for those never married		
Not enough to do nearby before/after activities			More so for Non-Whites			
Spending a lot of time and money on an ac activity is risk because there is a good chance I won't like it				Least so for those d/w/s		
Activities themselves take too long		More so for those with young children				
I feel unwelcome			More so for Non-Whites			

Barriers to Participation in Arts and Cultural Activities

Demographic Patterns of Perceived Barriers

Weighted Data (n=800)

	Region	Education	Income	Gender
Not enough time	Least so for those in the City of Cleveland	More so for those with some college	More so for those with higher incomes	More so for males
Activities cost too much				More so for females
Expensive parking		More so for those with no college	More so for those without very high incomes (\$75+)	
I don't always know about activities until it is too late				More so for males
Lack of desirable parking		More so for those with no college	More so for those with low incomes	
Activities are too far away	More so for those in Akron; Least so for those in City of Cleveland.		Most so both for those with the lowest and highest incomes (least so for middle incomes).	
I only like activities when I am familiar with the artists		More so for those with no college		
I usually avoid activities which are new to me		More so for those with no college		More so for males
Safety of activity's location		More so for those with no college	Most so both for those with the lowest and highest incomes (least so for middle incomes).	
Not enough blockbuster activities in area				More so for males
Activities are in places I am not familiar with	Less so for those in Cleveland West Suburbs; Most so for those in Cleveland South Suburbs and Akron			
Not enough activities which relate to people of my ethnic background	More so for those in City of Cleveland and Cleveland East Suburbs.	More so for those with no college	More so for those with low incomes	More so for males
Not enough to do nearby before/after activities		More so for those with no college		
Spending a lot of time and money on an art & culture activity is risk because there is a good chance I won't like it		More so for those with no college		
Activities themselves take too long		More so for those with no college		More so for males
I feel unwelcome		More so for those with no college		More so for males

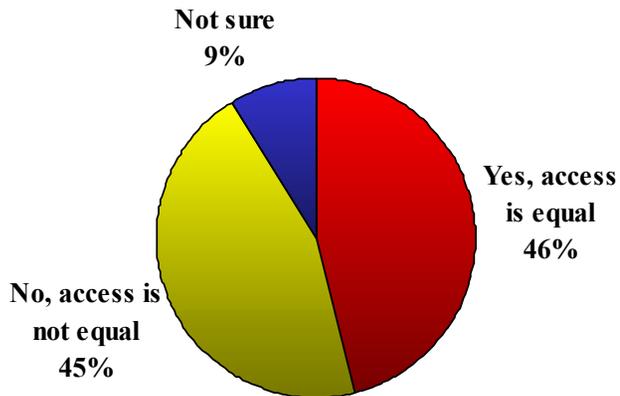
Barriers to Participation in Arts and Cultural Activities

Solutions to Barriers: Fair Access to 'Good Seats'

Weighted Data (n=400)

Because access to 'good seats' was such a thorny issue among focus group participants, we explored this issue in some depth within the telephone survey. We first asked all respondents if they felt that 'everyone had equal access to best seats.' A continuing annoyance (which hurts the image of the arts and cultural community overall) was the 'best seats' were often left empty for performances, galling those who were willing to pay for those seats but were denied access. Are prime seats really frequently left empty? If so, are owners of those seats open to making them available?

Is Access Equal for Everyone to the Best Seats for Local Popular Performances?



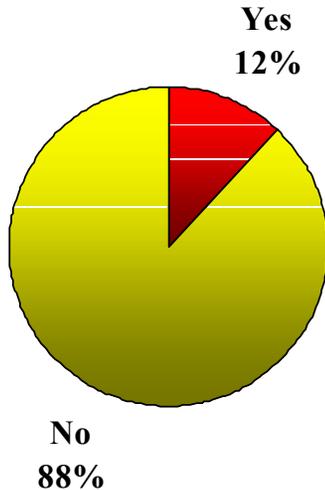
- As shown here, NE Ohioans were split on this question, in that almost half felt that access is 'equal', while almost as many felt that access to good seats is 'not equal to everyone.'
- Consumers most likely to agree that there is not equal access to the best seats included: Non-White NE Ohioans, those without college degrees, lower-income arts and cultural customers, and females.

Barriers to Participation in Arts and Cultural Activities

Solutions to Barriers: Fair Access to ‘Good Seats’ (continued)

Weighted Data (n=400)

Had to Cancel Plans to Attend a Performance at Last Minute?



What Did You Do With Tickets (if had to last minute cancel)? n=35

Try to find someone else to give/sell them to	48%
Nothing – tickets went unused	35%
Contact organization to exchange	6%
Contact organization to find buyer	2%
Other	8%

What Did You Do With Tickets That You Had Some Notice (if could not attend)? n=318

Try to find someone else to give/sell them to	42%
Nothing – tickets went unused	3%
Contact organization to exchange	3%
Contact organization to find buyer	1%
This never happened	50%
Other	1%

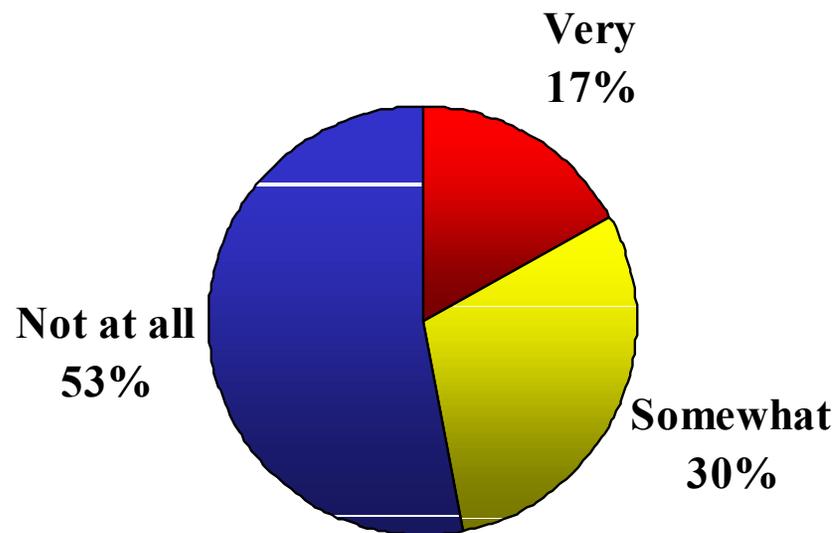
- We looked at this issue for two circumstances: if people find themselves unable to attend on the day of the performance, or if they had some notice they could not use tickets.
- Eleven percent of respondents reported having to cancel plans to attend a live performance at the last minute. A third of those tickets went unused, so often people found another taker for the tickets themselves. Therefore, ‘unused seats’ is a small but significant occurrence, enough to lend merit to complaints that ‘good seats’ are frequently and visibly left unused. The performance venues appear to play little to no role in the exchange or resale of tickets which need to be abandoned at the ‘last minute.’
- Fifty percent of respondents reported having to change plans for tickets they had, but with some notice before the day of the performance. However, with some notice people almost always were able to find a user of their tickets themselves.

Barriers to Participation in Arts and Cultural Activities

Solutions to Barriers: Fair Access to ‘Good Seats’ (continued)

Weighted Data (n=400)

Interest Levels in Bartering System for Tickets that Can't be Used



- Clearly many NE Ohioans have recently found themselves with tickets to performances that they cannot use. Although with some notice, most appear to be able to find users for them, tickets (and therefore seats) remaining unused is not an uncommon occurrence. When queried on their interest levels in a bartering system for such tickets, almost half of the survey respondents were interested (17% were ‘very interested.’)
 - The group that showed the most interest in such a system were those aged 35-44 - probably because they are the age group most likely to have small children.

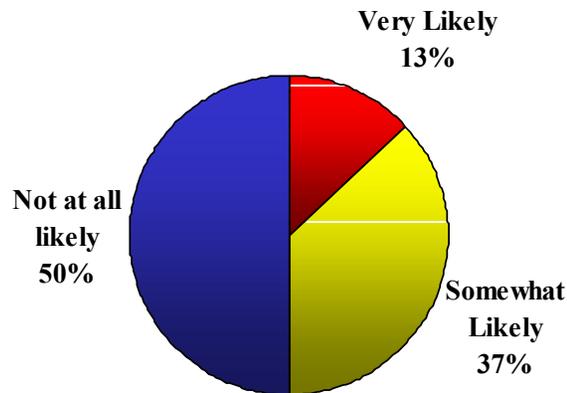
Barriers to Participation in Arts and Cultural Activities

Solutions to Barriers: Arts and Cultural Evening Packages

Weighted Data (n=400)

Past research has shown the experience of attending an arts and cultural activity begins with the step out of the consumer's door, and ends with the step back in upon return to the home. What that means is that every single part of the experience - the length of the drive, the familiarity or visual experience of the route taken, the level of traffic, the ease of finding parking, the fairness of the cost of parking, the distance from parking to the venue, the availability of a good meal or refreshments, the ticket-taking line - all of these things contribute to the overall impression of the arts and cultural experience itself. Arts and cultural institutions, of course, can only influence some of that experience (although consumers expect the institutions to be able to do more). **But, all of the experience influences whether or not consumers come back and/or recommend the event to others.** The point is that cooperation among all of those entities which influence the overall experience is expected by consumers, and institutions could benefit by heeding that advice. In sum, consumers see the arts and cultural community as a single entity, so the arts and cultural community should act that way and remember that the actions of one institution reflect on all of the institutions.

Interest in Purchase of Show/ Hotel/Dinner Discount Package



- One suggestion by focus group members to alleviate many of the barriers to attendance (cost, distance, unfair parking prices) was offers of discount 'packages' where people could purchase tickets to local performances along with dinner or a hotel. This figure shows that the level of interest is quite high, with 13% saying that they would be 'very likely' to purchase a package, and 37% saying they would be 'somewhat likely.'
- The market for these packages appears to be stronger among younger (under 35) and single (never married) consumers. Non-White consumers also showed a greater interest in these packages (26% 'very likely' to purchase).
- This seems like a 'win-win' for local arts and cultural institutions, restaurants, and hotels. However, the level of discount expected is fairly hefty - on average, people expect at least a 15%-20% discount on the total cost.

Barriers to Participation in Arts and Cultural Activities

Solutions to Barriers: Program Scheduling *Weighted Data (n=800)*

‘Lack of time’ and ‘scheduling conflicts’ were frequently cited barriers to attendance at arts and cultural activities. While the institutions can do little to alleviate the time crunch of many potential customers, the arts and cultural community, as a whole, can do as much as possible to provide a good variety of program schedules to accommodate as many potential customers as possible.

We asked survey respondents ‘when during the week (they) would have the time to attend an arts or cultural activity.’ The findings of that, presented as a percentage of all respondents, are shown below.

Best Times to Attend Art & Cultural Activity

	Anytime	Morning	Afternoons	Evenings	Row Total
Monday	1%	0%	2%	2%	4%
Tuesday	1%	2%	1%	2%	6%
Wednesday	1%	2%	2%	6%	10%
Thursday	1%	2%	2%	5%	9%
Friday	2%	2%	2%	10%	15%
Saturday	4%	1%	7%	11%	24%
Sunday	2%	1%	9%	4%	15%
Weekends	12%	1%	5%	9%	27%
Any day		1%	2%	17%	20%
<i>Column Total</i>	24%	11%	31%	64%	

- Eight-five percent of respondents expressed a preference for certain days/times of the week.
- Those with a preference reported a wide variety of preferred times to attend arts and cultural activities.
 - As we would expect, the most popular time blocks were Friday and Saturday evenings. The weekends, of course, were the preferred times overall.
 - Evenings, in general, were preferred by at least a 2 to 1 margin over afternoons and/or mornings.
 - Weekdays were not completely unpopular (up to 10% preferred weekday blocks of time); note that Wednesday and Thursday were about twice as popular as Mondays & Tuesdays.

Marketing & Communications

Marketing & Communications

Introduction

The finding that almost one-third (32%) of our survey participants said the fact that they often do not hear about arts and cultural activities ‘until it is too late’ is an indictment of the effectiveness of the marketing and advertising communications produced by our arts and cultural community. We are sure that no arts and cultural institution would like to hear there are many potential customers in our community anxious to attend their events, but didn’t because they didn’t even know about them. Our focus group participants expressed this very frustration, and our survey participants corroborated it.

To better understand ways to improve arts and cultural marketing and communications in our survey we explored this topic in depth. The conclusion was the communications of events occurring in our community have two faults: 1) They are not centralized or cohesive. Consumers reported that to *really know* what events or activities are coming up, one has to both ‘know where to look,’ and be very diligent about reviewing sources continuously; 2) Events and activities are not always communicated in a timely fashion, and there is a common perception that general media only reports ‘big’ events either the day of or the day after they occur.

Marketing & Communications

Main Sources of Information Weighted Data (n=400)

	% of Respondents****
Local or community newspaper	42%
<i>Plain Dealer/Friday Magazine</i>	22%
Word of mouth	16%
Radio News	13%
Television News	10%
Internet	9%
Television Ads *	8%
Radio Ads**	6%
<i>Scene Magazine</i>	5%
Direct Mail	4%
<i>Akron Beacon Journal</i>	2%
Workplace	2%
<i>Sun Press</i>	1%
Other***	7%

- The most common source of information regarding arts and cultural activities and events is newspapers. ‘Local’ or ‘community newspapers’ were almost twice as commonly cited as a source (42%) than the area’s major newspapers: *Plain Dealer* or *Akron Beacon Journal* (44%).
- Combined ‘news’ from the radio (13%) or television (10%) were the second most common source of information. This was slightly more so than combined television (8%) or radio (6%) advertisements.

*4% of those 8% specified public television

**Radio stations are specified in Appendix. See respondent verbatim comments, question 41.

***‘Other’ responses are specified in Appendix. See respondent verbatim comments, question 41.

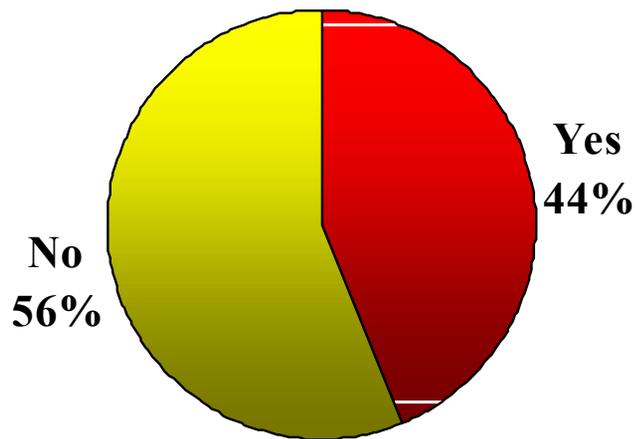
**** Multiple responses accepted. Does not sum to 100%.

Marketing & Communications

The Internet

Weighted Data (n=352)

Do You Use The Internet To Find Local Arts and Cultural Activities To Attend?



- Seventy-two percent of the survey respondents have regular access to the Internet either at home or at work.
 - As we see with all studies of Internet usage, younger consumers (under age 55) are more likely to have Internet access (81%) than those over age 55 (66%).
- Of those, 44% use the Internet to look for local arts and cultural activities to attend (this represents 22% of the total sample base).

Marketing & Communications

The Internet

Which Internet Sites Do You Use to Find Local A&C Activities To Attend?
(of those that use Internet for this purpose, n=144)

	% of Respondents*
Cleveland.com	94%
AOL	5%
Yahoo	4%
Ticketmaster.com	4%
ClevelandLive	3%
Other (see verbatims in Appendix)	26%

* Multiple responses accepted. Do not sum to 100%.

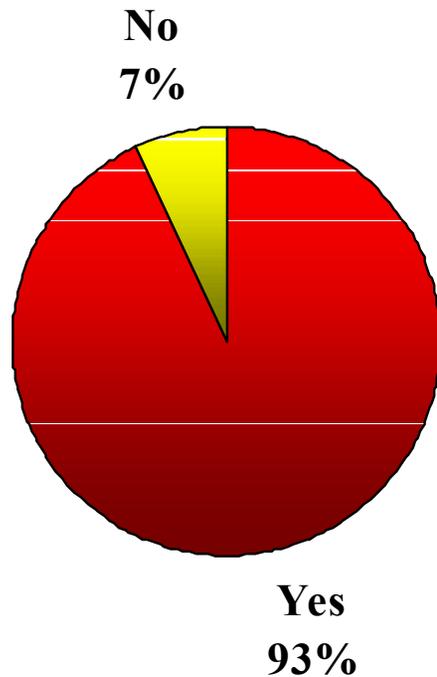
- We estimate that about one-in-five of the NE Ohio arts & culture patrons use the Internet to find information regarding these activities, and based on their responses it appears that one website - www.Cleveland.com- is by far the favored local source on the Internet, with 94% of the Internet-using respondents using that site (and most reported *only* that site). The implication here is that one site seems to have dominant ‘mind share’ of Internet users and that any new Internet site entrants into the arts and cultural information will require a lot of marketing & communications in order to steal that ‘mind share.’
- At least 75 of approximately 150 arts and cultural organizations that possess the technical capability to post information on the web, promote their events in Cleveland.com

Marketing & Communications

www.Cleveland.com

Are You Able To Easily Get Information
You Want On Activities from
Cleveland.com?

(of those that visit that site, n=132)



- For the most part, visitors to Cleveland.com feel that they can easily obtain arts and cultural activities information from that site. This appears to be a strong endorsement of the utility of that site for the arts and cultural community. However, we should warn the reader that evaluations of websites is extremely difficult to do via a telephone interview. A true evaluation of the quality of a website can only be done through true 'user' studies, where people can make their evaluations during use of the site.

Marketing & Communications

Information Sought From Web Sites

When Visiting Web Sites, Specifically What Types of Information Are Consumers Looking For?

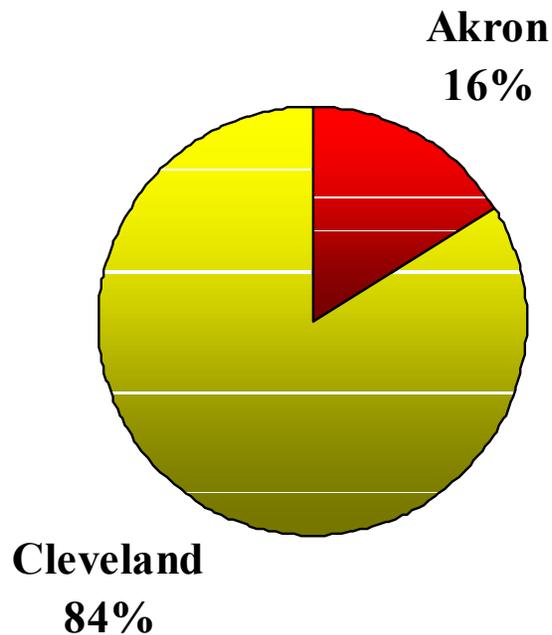
- Telephone survey respondents were asked to describe specifically what sort of information they tend to look for when they visit websites. Our goal was to build a priority list of types of information that should be included in a website dedicated to arts and cultural activities. We found, however, that there was a tremendous variety of responses. While they were mostly centered around seeking information regarding upcoming events, it was clear that the websites are used for a fair amount of ‘browsing.’ That is, people referred to their visits to websites as a casual opportunity to ‘check out’ what is new, or see ‘what is happening.’ This has implications for web site design in that they need to be more than just utilitarian in nature - simply having pages of schedules, search engines for venues, or maps. They also need to satisfy the consumer’s need to ‘explore,’ and be exposed to things they were not specifically looking for.
- The specific verbatim comments are included in the Appendix, respondent verbatim comments, question 47.

**Special Topics: Akron vs. Cleveland as
the Arts and Cultural Centers - The
Boundary Communities**

Special Topics: Akron vs. Cleveland as the Arts and Cultural Centers - The ‘Boundary’ Communities*

Preference for Akron vs. Cleveland
Weighted Data (n=120)

Are you more likely to attend an Akron- or Cleveland-based arts and cultural activity?



- 120 of the 800 respondents were earmarked as being from ‘boundary’ communities*, where geographically they could be designated as either Akron or Cleveland suburbs. We asked these respondents only about their preferences for attending events in either of the two arts and cultural centers, both of which are approximately equidistant for these consumers.
- By far, Cleveland was the predominant choice for these 120 respondents.

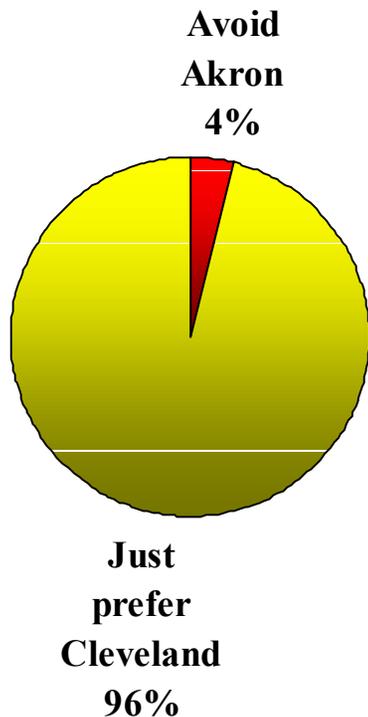
*Brunswick, Chippewa Lake, Lodi, Medina, Aurora, Streetsboro, Hudson, Northfield, Sagamore Hills, Macedonia, Peninsula, Richfield, Twinsburg

Special Topics: Akron vs. Cleveland as the Arts and Cultural Centers - The 'Boundary' Communities

Avoidance of Cleveland or Akron

Is there anything preventing you from going to Akron or do you just prefer going to Cleveland?

Those that prefer Cleveland (n=35)



- Those that do prefer Cleveland stated only a 'soft' preference for Cleveland - that is, for the most part they did not report an explicit reason to avoid Akron.
- Therefore, Akron-based institutions can focus on these boundary communities while marketing, knowing that they are not impeded by any specific argument against attending events in Akron.

Special Topics: Key Influences on Arts and Cultural Participation

Special Topics: Key Influences on Arts and Cultural Participation

Who or what builds interest in arts and cultural activities?

Weighted Data (n=400)

Who or What First Influenced Preference for Arts and Cultural Activities?

	% of Respondents*
Childhood Influences	
School:	
School/Field Trips	5%
A teacher (specific)	5%
Family Members:	
Parent(s)	21%
Family (general)	3%
Brother/Sister	2%
Grandparent	2%
Aunt/Uncle	1%
Music teacher/instructor	1%
Adult Influences	
Adult friend	6%
Spouse	6%
My children	3%
College	1%
A specific event/Program/Play	4%
A specific artist/author/performer	2%
Self	3%
No one/Nothing specific	<1%
Other	1%
Not Sure	1%

One of the most striking findings from the focus group research was the clear and consistent finding that arts and cultural consumers had *someone* in their youth or young adulthood that strongly influenced their current level and type of arts and cultural activities that they pursue. **Ninety-six percent of our survey participants could name a specific person or event that most influenced them.** Most could recall who the person was specifically that most influenced them - usually it was a parent or other close relative, or a teacher (or school in general). In focus groups, people spoke fondly of how these key adults in their lives were dogged about exposing their young charges to the arts and culture (whether the children like it or not!), and it was clear in our focus group discussions that, as adults, all were grateful for that exposure. It is this appreciation for the influence of those key adults during their youth that made so many of our respondents adamant about exposing their own children and grandchildren to arts and cultural activities now.

We asked specifically who and at what age their key influencers had such an effect on them, and the results are presented here.

- Mostly respondents attribute their affinity for arts and cultural activities to specific *people* (especially family members), as opposed to specific events.

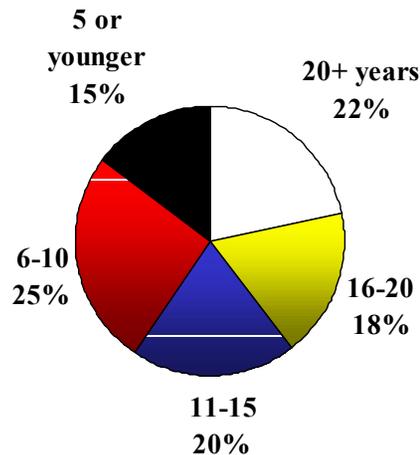
* Multiple responses accepted. Does not sum to 100%.

Special Topics: Key Influences on Arts and Cultural Participation

How does a community influence consumption of arts & culture? Weighted Data (n=400)

In addition to determining who or what influenced current patterns of arts and cultural participation, we also asked at what age this influence occurred. Below we show the relationship with this age of influence with current levels of participation in arts and cultural activities.

Age of First Influence on Arts and Cultural Preferences

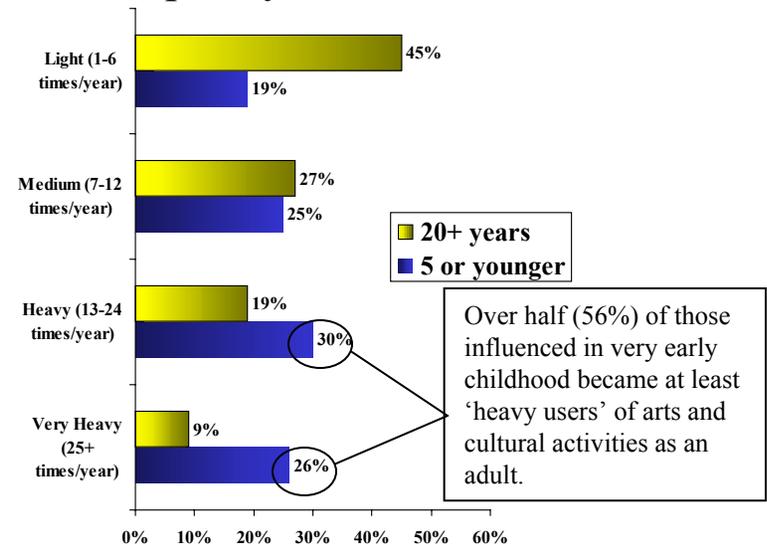


Art and culture is a community need. It really hasn't hit home yet, but it's starting to in communities where they're cutting out music and art. The arts are food for the soul and if we neglect that then we're going to have a lot of problems.

SE Cuyahoga County Focus Group Participant

When I was a kid, maybe around 7 or 8, my uncle invited me to go to the opera. I couldn't understand a work, but it was beautiful. I just could never forget that.
Cleveland West Side Group Participant

Relationship of Age of First Influence and Adult Frequency of Attendance



Over half (56%) of those influenced in very early childhood became at least 'heavy users' of arts and cultural activities as an adult.

This figure (right) shows a clear relationship between 'age of influence' by someone or thing in terms of exposure to arts and cultural experiences and the level of participation in arts and cultural activities as an adult. This is a strong inverse relationship - greater levels of adult participation are related to earlier ages of influence.

- Those not exposed to arts and cultural experiences before young adulthood are more than twice as likely to remain 'light users' of arts and cultural activities as an adult (45% of those influenced after age 20 are 'light users' vs. 19% of those influenced in early childhood). Likewise, over half (56%) of those influenced in very early childhood became at least 'heavy users' of arts and cultural activities as an adult, as opposed to only 28% of those influenced in early adulthood.



The Community Partnership for Arts and Culture
50 Public Square
Tower City Center, Suite 555
Cleveland, OH 44113
www.culture4me.org www.cultureplan.org

Our Mission

...is to strengthen Northeast Ohio's cultural assets and help more residents and visitors enjoy them.

To order, call: (216) 575-0331 or email Cpac2001@aol.com