Synthesis Report

Artists, Organizations & Audience Survey Results

Synthesis of findings from three surveys about individual literary, performing, and visual artists; arts and cultural organizations; and cultural audiences.

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for
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COMMUNITY PARTNERSHIP FOR ARTS AND CULTURE

1998-1999

Artists, Organizations, and Audience Survey Results
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Introduction

The Community Partnership for Arts and Culture, (The Partnership) is developing Northeast Ohio's first strategic arts and cultural plan. To guide policy decisions related to this plan, The Partnership launched a series of research initiatives between March 1998 and March 1999. In addition to providing valuable information about Northeast Ohio's collective arts and cultural resources, this body of research gives individual organizations an opportunity to learn more about their programs, services, and audiences.

This narrative presents findings from three research projects:

- Section 1: *Individual Artist Survey* examines the needs of the region's diverse community of literary, performing, and visual artists.
- Section 2: *Organizational Survey* explores the scope of education, outreach, and tourism programs as well as collaborations and partnerships.
- Section 3: *Audience Survey* reveals a wealth of information on arts and cultural consumers, such as perception of event quality and value, purchasing habits, and other events and services enjoyed along with arts and cultural experiences.

Research of this breadth and depth requires the dedication and commitment of countless individuals. To the staff of the region's arts and cultural organizations, the thousands of audience members who took a few minutes of their time to complete surveys, the hundreds of individual artists who offered their comments, and the army of volunteers who accompanied Partnership staff to all corners of Northeast Ohio, we extend our deepest thanks.

Section 1: Individual Artist Survey

Overview

During the spring of 1998, The Partnership contacted arts and cultural organizations to locate mailing lists of individual literary, performing, and visual artists living and working in Northeast Ohio. Approximately twenty organizations provided mailing lists of varying size allowing The Partnership to mail more than 9,000 surveys. It should be noted that the lists were often provided in formats which made it impossible to remove duplicates. In addition to contacting artists by mail, The Partnership provided surveys to artists to distribute to their colleagues. In all, 600 participants returned completed surveys.

The goal was to collect information from individual artists concerning:

- Needs for, and conditions of, living/working space
- Needs for technical assistance, including technical skills workshops, computer graphics, and internet training
- Needs for exhibition opportunities
- Involvement through galleries, festivals, and special events in the region

Findings

Discipline and Earnings

Half of the individuals who responded said their primary artistic discipline was a form of visual arts; nearly half of these respondents reported activity in more than one medium. Crafts artists and writers were the next most frequently-reported disciplines at 32 percent and 23 percent respectively.

About 1 in 5 respondents (22 percent) stated they earn 50 percent or more of their income from artistic work. All other respondents reported working at least one other job and, in some cases, held multiple positions. For the purpose of this analysis, those who earned at least half of their annual income from artistic-related work were classified as "Group A Artists" while those who earned less than 50 percent were categorized as "Group B Artists." (NOTE: Group A Artists and Group B Artists labels are used for statistical analysis purposes only.) With 78 percent of the respondents classified as Group B Artists (or not reporting income sources), artists in Northeast Ohio are facing challenges which make it difficult to earn their livelihoods from primarily art and cultural work.

On average, artists report earning 25 percent of their gross income from teaching, 15 percent from selling artwork, 9 percent from commercial work, 7 percent from performing, 4 percent from writing, and 21 percent from other sources.[1]

In addition to questions about gross income, artists were asked "how do you afford to do your art?" Given a list of choices, artists were asked to identify income sources which allow them to create works of art. Product sales, support received by doing collaborative work, and institutional support are the top three items identified (see Table 1). More than 58 percent noted "other." Reviewing individual responses, "other" refers to everything from self support and spouse support to teaching and business or legal settlements.

Table 1

How do you "afford" to do your artwork (multiple responses allowed, percents total more than 100)	***Percent***
Product sales	38.6%
Support received by doing collaborative work with other artists/arts and cultural organizations	14.8%
Institutional support	10.3%
Ticket sales	9.2%
Pro bono services	8.1%
State/municipal support	7.9%
Using a non-profit umbrella	7.6%
Corporate support	5.4%
Federal support	3.1%
Other	58.9%

Among all respondents, 43 percent reported teaching in an artistic field (with visual artists somewhat more likely to teach than artists in other disciplines). In terms of activities pursued in order to sell artwork, 20 percent reported use of galleries and exhibitions while 14 percent listed events such as fairs and festivals. One in 10 respondents reported "networking"[2] as a sales tactic while an equal number use direct mail and flyers.

[1] Multiple-responses, percents total more than 100.
[2] Networking often refers to informal relationships among individuals or organizations. Collaboration is a more formalized relationship where individuals or organizations work together.

Business Expenses, Space Issues

Nearly 40 percent of the respondents have total annual business expenses between $1,000 and $5,000 (see Table 2). Forty percent of Group A Artists report annual business expenses of $10,000 or more, while fewer than 10 percent of Group B Artists reported business expenses over $10,000. In comparison, over 30 percent of Group B Artists reported business expenses under $1,000 compared to 16 percent of Group A Artists.

Table 2

All Artists: Annual Business Expenses	
Dollar Amount	Percent
$500 or less	13.80%
$500.01 to $1,000	13.80%
$1,001 to $5,000	39.20%
$5,001 to $10,000	16.60%
$10,001 to $20,000	9.00%
$20,001 to $30,000	3.40%
$30,001 to $100,000	3.10%
$100,001 to $150,000	0.80%
$150,000+	0.30%

More than 69 percent of respondents report living and working in the same space (see Figure 1).

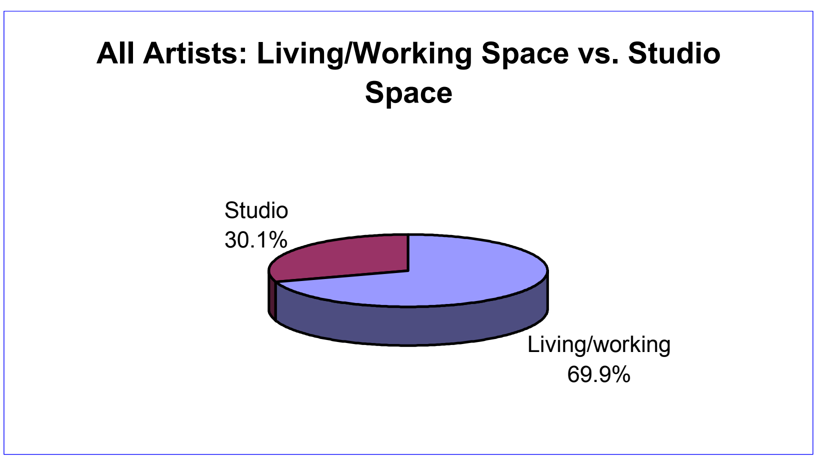

Figure 1

Only 30 percent of all respondents indicated they occupy a studio space separate from their home (with visual artists much more likely than performing artists to occupy separate studio space). Separate workspace, however, was not limited only to Group A Artists (27 percent) as 20 percent of Group B Artists also reported having studio space separate from their home. More than 47 percent of artists occupying a combined living and working area report the space does not meet their needs, compared with more than 22 percent of artists with separate living and working spaces (see Table 3). Of all artists reporting their current space does not meet their needs, a majority reported limited size and furnishings.

Table 3

Does this space sufficiently suit your needs?	***All artists***	***Arts with combined living and working space***	***Artists with separate studio space***
Yes	58.8%	52.7%	77.2%
No	41.2%	47.3%	22.8%

Monthly rents paid for separate studio space ranged from $50 to $2,500, with a mean[3] of $436 and a median[4] of $300. For combined living/working space, artists reported spending from $50 to $1,500 each month, with a mean of $495 and a median of $476. Artists reported separate studios ranging in size from 40 to 8,000 square feet (with a mean of 1,588 and a median of 1,000). For combined living/working space, artists reported occupying up to 11,000 square feet (with a mean of 1,278 and a median of 1,000). Monthly (mean) rental costs per square foot were reported to be $2.98 for combined living/working space and $4.51 for studio space separate from a home.

Memberships and Collaborations

The individual artists survey collected information on service organization memberships and collaborative efforts. The most frequently-noted membership organizations were the Cleveland-based NOVA[5] (New Organization for Visual Artists) and SPACES. Two-thirds of all respondents reported membership in an artists' service organization (including 68 percent of visual artists, 58 percent of writers, and 57 percent performing artists). Only 16 percent of respondents reported engaging in partnerships with not-for-profit organizations or private (for-profit) businesses.

[3] Mean is the average of a series of numbers.
[4] Median is a value in an ordered set of values below and above which there are an equal number of values.
[5] NOVA ceased operations shortly after the completion of this survey.

Service Needs

In order to determine the service needs of individual artists, those surveyed were provided with a list of nineteen types of assistance. Artists were asked to indicate the level of importance of each item on a scale of one to ten (with one being least important and ten indicating great importance). Artists report notification of deadlines, increased performance/exhibition opportunities, media access, networking, and collaborations as their top five needs (see Table 4).

Table 4

Type of Assistance	*Mean*
Timely notification of arts and culture related deadlines	8.3
More performances/exhibition opportunities	8.2
Access to and coverage by the media	8.2
Networking with other artists and arts and cultural institutions[6]	7.7
Collaborations with other artists and cultural institutions	7.2
Inclusion in arts resource book[7]	7.0
Opportunity to connect with neighborhood resources	6.9
Work included in registry[8]	6.5
Teaching opportunities	6.4
Percent for art programs	6.3
Opportunities to purchase bulk supplies	6.2
Training opportunities (artistic)	6.0
Studio/rehearsal space	5.8
Booking services	5.7
Opportunities to work in schools	5.6
Group insurance	5.5
Training opportunities (technical)	5.3
Accounting services	4.7
Training opportunities (administrative)	4.5
Scale 1 = low importance; 10 = extremely important	

[6] Networking often refers to informal relationships among individuals or organizations. Collaboration is a more formalized relationship where individuals or organizations work together.
[7] An arts resource book is commonly defined as a publication listing goods and services artists are willing to provide e.g., teaching in schools.
[8] A registry is commonly defined as a catalogue of various artists' work.

Demographic Characteristics

More women (57 percent) than men (43 percent) returned completed surveys. This gender gap in the response rate is a common phenomena observed throughout the survey research field. Nearly 75 percent of respondents were between the ages of 35 and 54, and the majority of respondents, 85.7 percent, were white. One in five (21 percent) of respondents earn between $25,000 and $34,999 annually while another 21 percent reported annual household incomes of between $50,000 and $74,999. More visual artists reported holding master's degrees (39.7 percent) than did those in other artistic areas. In aggregate, responding artists report high education levels (see Figure 2).

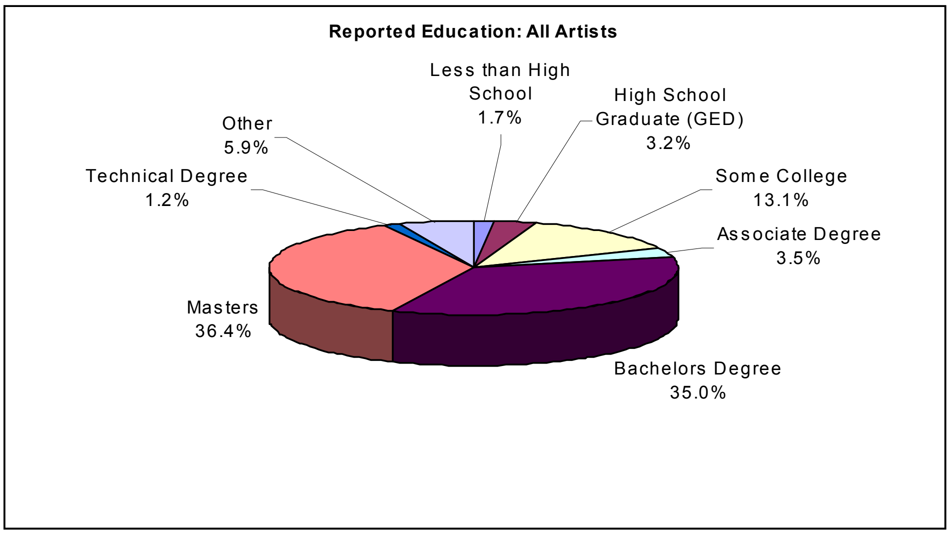

Figure 2

Key Findings

The key findings from The Partnership's individual artist survey are:

- Notification of deadlines, increased performance and exhibition opportunities, access to and coverage by the media, networking, and increased collaborations are the top five needs reported by artists.
- 78 percent of artists earn less than 50 percent of their annual income from the creation of artistic products.
- Artists with separate living and working spaces report higher levels of satisfaction with their environment than artists who utilize a combined living and working space.
- Two thirds of all artists are members of service organizations.[9]

[9] NOVA ceased operations shortly after the completion of this survey.

Section 2: Organizational Survey

Overview

During the summer of 1998, The Partnership distributed 425 surveys to the region's arts and cultural organizations. A total of 51 completed surveys were returned and included in this analysis (see Appendix A for a list of participating organizations).

The purpose of the survey was to determine:

- The range of education, outreach, and tourism programs as well as organizational partnerships and collaborations.
- The most important issues facing organizations during the next five years
- Top needs in the areas of organizational development and technical assistance
- What organizations perceive to be the critical issues affecting arts and cultural development in Northeast Ohio

Findings

Critical Issues

When asked to identify the most critical issues affecting future cultural development in Northeast Ohio, 42 percent cited funding followed by marketing and audience development (17 percent), and the need for "sufficient" staff (13 percent). The top reported needs for technical assistance are: board development (31 percent), fundraising (25 percent), and marketing (23 percent).

Outreach

Outreach programs are defined as initiatives specifically designed to reach new or expanded audiences, either on- or off-site, with free or paid admissions. These programs are often targeted at underserved audiences whether intended as a public service to the community or to build new audiences and bases of support. Performances are the most commonly-cited type of outreach program. Many outreach programs do not target any particular community but are "broadcast" to the entire market (13 percent of programs target "all communities.")

Arts and cultural organizations are most likely to offer outreach programs, classes and workshops (69 percent) among their activities, followed by paid and free performances (63 percent each) and in-school education programs (60 percent).

Thirty-five (35) organizations reported on 102 separate outreach programs. Outreach programs provide an estimated 2.64 million services for people living and visiting Northeast Ohio (with a mean of 29,000 services and a median of 725 services). Northeast Ohio arts and cultural organizations report investing $2.3 million annually in outreach programs with an average cost of $33,545 (with a median project cost of $6,000).

Education

Education programs are defined as programs with the specific purpose of educating, teaching, or instructing individuals, groups, children, adults, and seniors through any programs sponsored, facilitated, conducted, or hosted by an arts and cultural organization. Education programs can be on-site or off-site, and include those programming efforts conducted at an organization's home venue, in schools, and at other sites. Admission to education programs can be free or paid, and can take the form of tuition, membership, fees, etc.

The region's arts and cultural assets invest $11.3 million annually in arts and cultural education programs. On average, education programs were reported to cost $68,173. However, approximately half of these programs cost less than $15,000 (with a median cost of $15,178).

Forty-four (44) organizations reported on 276 separate education programs with a few groups accounting for more than 20 separate programs. Performances were the most commonly-cited type of program for education activities. Arts and cultural organizations report providing 2.6 million educational services for Northeast Ohio's residents and visitors (a mean of 10,000 and a median of 917). The availability of education (as well as outreach) programs appears to diminish as grade level rises, with more programs available for elementary grades and fewer for secondary students.

Cultural Tourism

Twenty-four (24) organizations reported on 56 separate cultural tourism programs (with a single group accounting for 11 separate programs). Media campaigns and "other" activities (such as promotional booths and publications) were common among the cultural tourism programs cited. The cultural tourism programs provide more than 9.3 million services annually to residents and visitors (with a mean of 258,000 and a median of 1,750). Arts and cultural organizations report investing $2.2 million in tourism programs. Cultural tourism programs were reported to cost an average of $52,247 with a median of $11,000.

Because of its size, a media campaign developed by the Cleveland Convention and Visitors Bureau and The Cleveland Cultural Coalition is analyzed separately. The joint media endeavor provided an additional 8.3 million services at a cost of $2 million.

Programs were most often reported to serve "day-trippers" (18 percent) followed by regional visitors and youth (13 percent each). Twenty-five percent (25 percent) of all programs listed either no target audience definition or were classified as "other." Most cultural tourism programs (30 percent) last only one day.

Partnerships

Arts and cultural organizations were asked to describe a range of partnerships and collaborations in which they engage. Organizations were given definitions of various types of partnerships and asked to describe the nature of their interactions with other organizations. For the purposes of this survey, a partnership is "cooperative" if organizations engage in an informal working relationship (e.g., sharing mailing lists), "collaborative" if organizations maintain formal ties (e.g., two or more organizations offering joint programs, submitting joint funding applications, offering shared ticketing, etc.), or a "consolidation" if organizations combine operations (e.g., two or more organizations which have combined aspects of programming, operations, etc.)

Partnerships were defined as possibly involving (but not limited to) arts organizations working with other arts or cultural institutions or with other entities such as human service providers, educational institutions, businesses and corporations, neighborhood/ community groups, civic associations, or social clubs. The majority of partnerships (38 percent) involve non-artistic activities (such as administrative or marketing projects). The majority of partnerships were reported to involve "cooperation" (60 percent), followed by "collaborative" arrangements (26 percent) and "consolidated" (14 percent) activities.

The majority of all outreach, education, and tourism partnerships were reported to take place between arts and community-based organizations rather than between two or more arts and cultural groups. Education programs are most likely to involve only a single partner, (such as an individual school or district) whereas outreach and cultural tourism programs are more likely to involve multiple participants. Tourism programs are reported to involve the highest number of "diversified" partnerships (involving two or more different types of organizations).

Funding Sources

Private foundations are most often the sources of funding for education and outreach programs, (23 percent and 24 percent, respectively) while "fees" support 21 percent of reported education programs. Educational programs are more often supported by different types of funders (69 percent reporting diversified[10] funding sources versus 51 percent for outreach and 41 percent for tourism programs). Cultural tourism programs are most likely to have multiple funding sources (73 percent versus 60 percent for education and 65 percent for outreach programs).

[10] Diversified funding sources refers to receiving funding from different types of sources e.g., private foundations, individuals, corporations, government agencies, etc. Multiple funding sources refers to receiving funding from one category of funders (e.g., all foundations).

Success Factors and Obstacles

Arts and cultural organizations identified the "nature of a program" itself as the primary reason for success for all types of programs and partnerships. Program staffs appear to be critical to the success of educational programs (cited in 20 percent of programs), while volunteers are noted as important to the success of partnerships (in 15 percent of all cases).

Lack of additional funding is the biggest obstacle cited across the board (35 percent for education programs, 38 percent for outreach activities, 45 percent for partnerships, and 50 percent for cultural tourism programs). The need for staff support was noted as the second most important obstacle for both education and outreach programs. Communication between and among partners (and awareness of partnership opportunities) is cited as a critical obstacle toward implementing and/or establishing more partnerships (in 22 percent of all cases reported).

Key Findings

The key findings from The Partnership's organizational survey are:

- Arts and cultural organizations invest $11.3 million annually in education programs providing 2.6 million services annually.
- Arts and cultural organizations invest $2.3 million in outreach programs providing 2.64 million services annually.
- Arts and cultural organizations invest $2.2 million in cultural tourism programs annually providing more than 9.3 million services annually to residents and visitors.
- Funding is the most cited critical issue reported by arts and cultural organizations.
- The availability of education (as well as outreach) programs appears to diminish as grade level rises, with more programs available for elementary grades and fewer for secondary students.

Section 3: Audience Survey

Overview

From May to November 1998, The Partnership and more than 80 volunteers collected 6,013 completed audience surveys from 59 events throughout the seven-county region. To ensure a random sample, all participants had an equal chance of being surveyed regardless of what time they arrived at an event. To prevent any single event from skewing the analysis, a maximum of 100 completed surveys from each event were analyzed (see Appendix B for a list of participating organizations).

The objective of the audience survey was to uncover information on:

- Spending patterns associated with attending arts and cultural attractions
- Respondents' perceptions of the value and quality of Northeast Ohio arts and cultural offerings
- Frequency of attending arts and cultural attractions
- How people learn about arts and cultural opportunities
- Party size and composition
- Audience member home ZIP code (see Appendix C for a list of ZIP codes by frequency)

Findings

Residents: Attendance Patterns[11]

Results from the audience survey were analyzed according to frequent and infrequent attendance at "events" and "destinations." Respondents attending "events" arrived at a specified time, viewed the performance or exhibition, and left the venue shortly after the performance finished. These attractions were seated and for a fixed period of time. Examples of "events" included music performances, plays, and readings and lectures. "Destinations" were unseated and had no fixed starting or ending point. These attractions were continuous or daylong activities at which people, came and went, at their leisure. Examples of "destinations" included art museums and galleries, nature centers, science and history museums, and fairs and festivals.

The primary differences noted between frequent and infrequent attendees of "events" were age, education, income, and, to some extent, race and marital status. Frequent "event" attendees were more likely to be older (with nearly one-third over age 65), have high education levels (72

[11] For the purposes of this analysis, residents are those respondents with a home ZIP Code in Cuyahoga, Geauga, Lake, Lorain, Medina, Portage, or Summit County.

percent reporting at least a bachelors degree), and very high income levels (25 percent reporting annual household incomes over $100,000). Frequent attendees were more likely to be White/Anglo and to be married (or with a life partner) than infrequent attendees. Infrequent attenders were more racially diverse and contained more single individuals than frequent attenders.

At “destinations,” similar differences between frequent and infrequent attendees were observed. Females predominated in both groups, although men represented a higher proportion of the infrequent “destination” attendees. These infrequent attendees can also be described as more likely to have children under 18 living at home, to be younger (half under age 45), and to have lower household income levels (39 percent reporting annual household income under $35,000).

The majority of people had previously attended the institution at which they were surveyed, with 78.5 percent of “event” attendees and 66 percent of “destination” attendees reporting previous attendance. “Event” attendees were more likely to have attended multiple times, with 54 percent reporting prior attendance at the surveyed institution three or more times compared to 32 percent of “destination” attendees. For both “event” and “destination” attendees, more than 92 percent had attended other Northeast Ohio area cultural institutions.

Figure 3 illustrates attendance at different types of cultural activities among Northeast Ohio area residents:

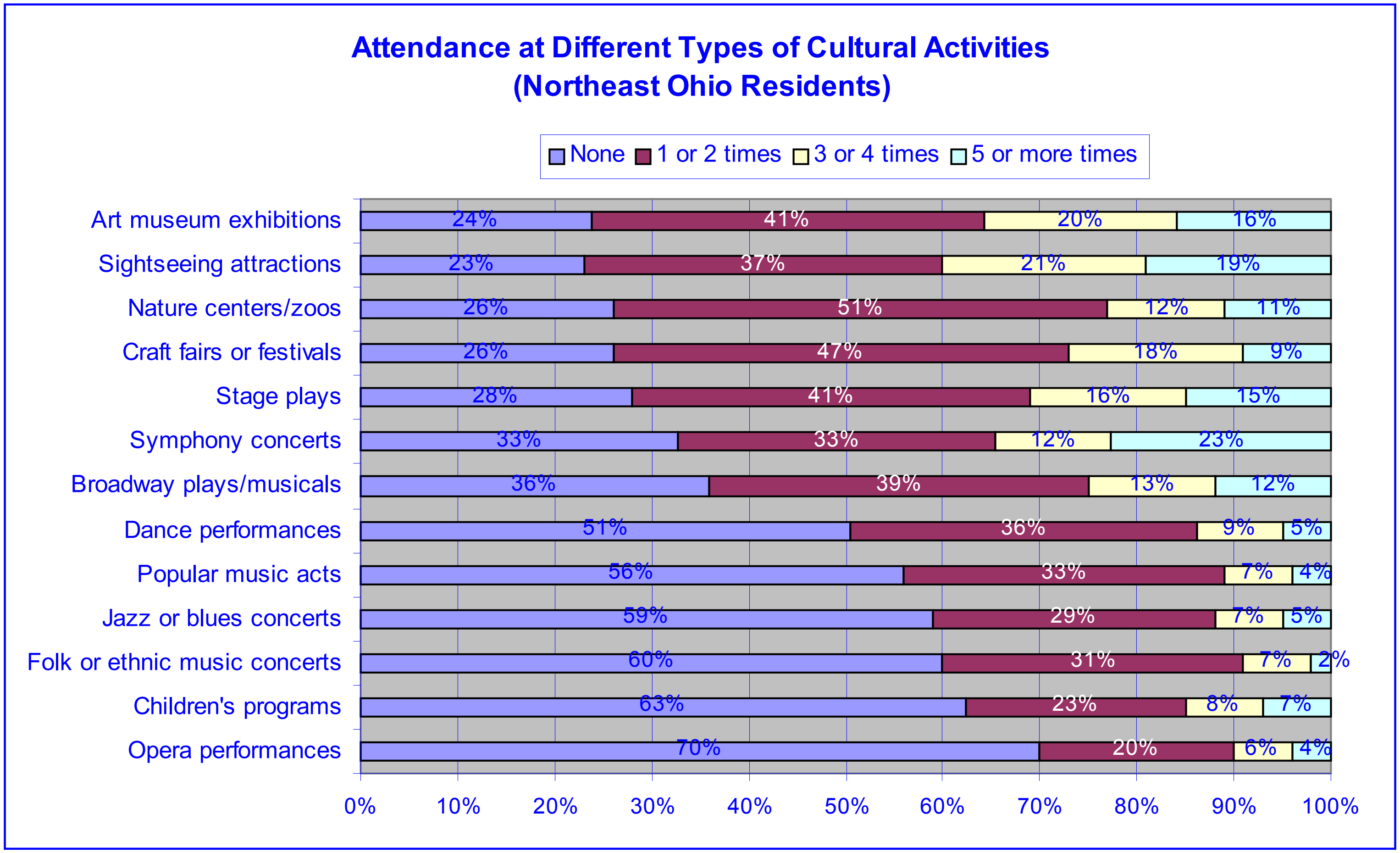

Figure 3

As the chart illustrates, art museum exhibitions had the highest rate of attendance (e.g., at least one or more times) and symphony concerts had the most frequent attendees (23 percent attending five or more times).

Visitors: Attendance Patterns

Differences among frequent and infrequent attendees among the visitor (individuals living outside the seven-county region) sample were also noted. In terms of "event" attendance, frequent attendees were older and had higher proportions of divorced/separated or widowed respondents, with high education levels. There was little difference between the visitor population for "event" and "destination" attendance patterns.

There were two significant differences between the visitor populations surveyed at "events" and "destinations": while 38 percent of those surveyed at "events" were visiting the institution for the first time, 67 percent of "destination" attendees were attending that location for the first time. Whereas 78.5 percent of "event" visitors attended other Northeast Ohio cultural institutions, 50.5 percent of "destination" visitors attended no other cultural institutions in Northeast Ohio.

Figure 4 illustrates attendance at different types of cultural activities among visitors to the Northeast Ohio area:

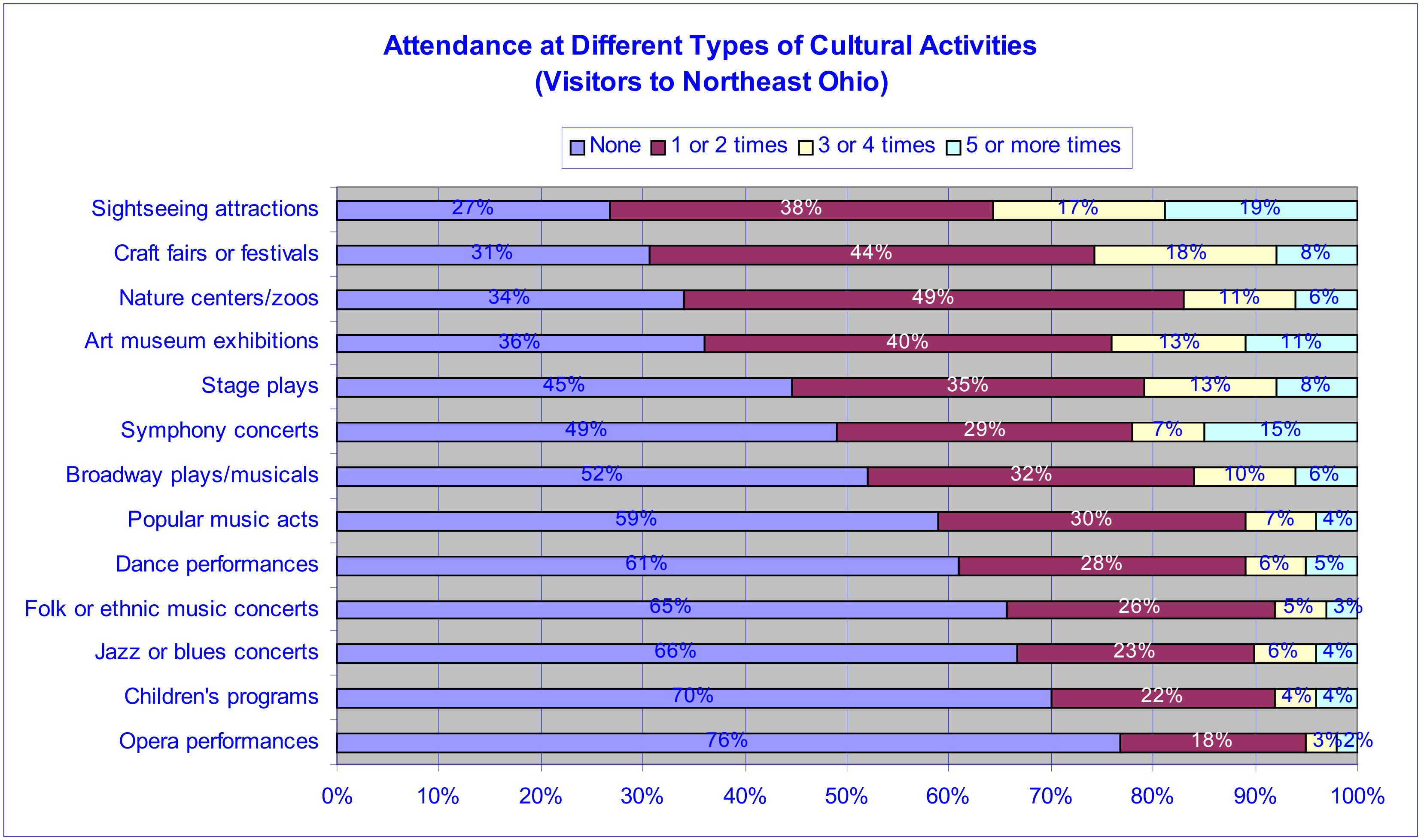

Figure 4

As the chart illustrates, sightseeing attractions[12] not only had the highest rate of overall (74 percent at least one or more times) attendance but also the most frequent attendees (19 percent attending five or more times). Craft fairs/festivals (70 percent at least one or more times), nature centers/zoos (66 percent at least one or more times), and art museum exhibitions (64 percent at least one or more times) were also popular activities for visitors.

Spending Patterns

Respondents were asked to indicate the range of expenses incurred in conjunction with attendance at an "event" or "destination." Respondents from outside the seven-county market area incurred higher average expenses connected with attending than did residents of the seven counties (see Table 5).

Table 5

Dollars you expect to spend on the following items in connection with your attendance at this performance, exhibition, or attraction. (average dollar amount reported)	***All survey respondents***	***Residents of the seven-county area***	***Visitors from outside the seven-county area***
On tickets/admission	$39.17	$38.53	$40.77
On food	$28.93	$27.76	$32.55
On travel (parking, taxi, air fares, etc.)	$19.57	$16.43	$30.10
On shopping	$17.00	$12.74	$29.15
On merchandise at this site	$14.01	$12.15	$18.15
On lodging	$11.00	$3.41	$41.80
On other entertainment	$10.53	$7.45	$23.91

[12] Sightseeing attractions commonly refers to parks, monuments, and blockbuster shows or exhibits.

Quality/Price Ratings

In general, respondents are pleased with the quality of "events" and "destinations" they attended, with 67.5 percent of the total sample rating their experience as excellent and 28.9 percent as good (see Figure 5).

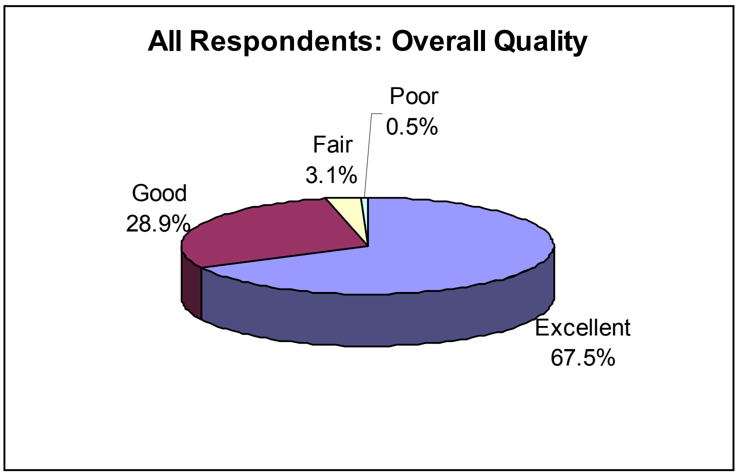

Figure 5

Respondents also are satisfied with prices paid for cultural programs, with 86.5 percent noting ticket prices or admission costs as "just right" versus 8.4 percent responding prices were "too high" and 5.1 percent saying "too low" (see Figure 6).

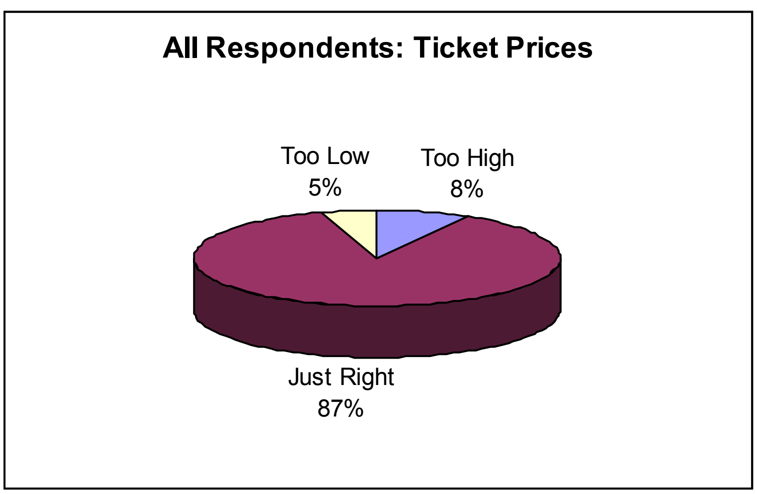

Figure 6

Overnight Visitors

Despite similarities on most measures, visitors who stayed overnight exhibited some differences from visitors who did not. Visitors staying overnight spent an average of $79.62 on lodging, primarily found out about events or attractions via word of mouth, spent more on shopping ($54.02 on average compared to $15.87), spent more on "on site" merchandise ($29.52 versus $11.92).

Information Sources

Word-of-mouth and the mail are the two greatest sources of information about events reports by survey respondents (see Table 6).

Table 6

Source of Information	*Percent*
Word of Mouth - Family Member or Friend	21.0%
By Mail	20.3%
Local Radio	19.6%
Business Contacts/Co-Worker	17.8%
Subscription	16.6%
Local Newspaper/Magazine	16.2%
Poster, Flyer, Brochure	14.6%
Web Site	11.1%
Other	10.6%
Local Television	4.2%
Group Invitation	3.2%
School Notices	2.4%
NOTE: Multiple Responses, Percents Total More Than 100	

Among frequent resident attendees, nearly one-third of "event" attendees cited subscription (28.4 percent) or mail (28.6 percent) as an information source. For frequent attendees of "destinations," local news (36.9 percent) and word-of-mouth (47.8 percent) were cited most frequently (identical to those sources cited by infrequent "destination" attendees). Infrequent attendees of "events" were most likely to find out about events from business contacts (36.3 percent) followed by local radio (23.5 percent) and "the web" (22.8 percent).

Attendance Patterns by Party

There were few differences between "event" and "destination" attendance by either residents or visitors, and those attending frequently or infrequently, in terms of who attended the "event." Spouse or lifetime partner was the most frequently cited companion by all groups. Attendees of "destinations" were more likely to attend with children, and infrequent attendees attended more often with children and/or other members of their families.

Key Findings

The key findings from The Partnership's audience survey are:

- Visitors to Northeast Ohio's arts and cultural offerings spend on average more on shopping, travel, lodging, and other entertainment than residents.
- Visitors staying overnight spent an average of $79.62 on lodging.
- More than 96 percent of consumers rank the arts and cultural activities participated in as either "good" or "excellent."
- Word-of-mouth, mail, local radio, business contacts/co-workers, and subscription are the top five sources of event information cited by arts and cultural consumers.
- Respondents are satisfied with prices paid for cultural programs with 86.5 percent noting ticket prices or admission costs as "just right."

Methodology

Individual Artist Survey

The *Individual Artist Survey* component of the study was part of the larger effort to learn about and better understand the needs of individual artists and crafts people who were living or working in the Northeast Ohio seven-county region. This information provides an artist profile that includes demographic data and an understanding of artists' work and needs.

The *Individual Artist Survey* was sent to individual artists and included the artistic disciplines of music, interdisciplinary and performance arts, photography, folk arts, conservator, design arts, dance, literature, media arts, opera/musical theatre, visual arts, theatre, crafts and a category for "other." Survey participants resided or worked Cuyahoga, Geauga, Lake, Lorain, Medina, Portage, and Summit Counties.

Of the 9,205 surveys sent, a total of 600 were completed and returned during the summer of 1998.

The survey investigated the following issues:

- Needs for and conditions of living/working space
- Needs for technical assistance, including technical skills workshops and computer graphics and internet training
- Existing exhibition opportunities
- The need for additional exhibition opportunities
- Involvement through galleries, festivals and special events in the region
- Opinions with respect to the cultural future of the Northeast Ohio region

Organizational Survey

A 21-page survey was mailed to an assembled list of arts and cultural organizations in the Northeast Ohio planning region. Repeated follow-up calls were made to request return of completed surveys A total of 51 completed surveys were returned. More than half of the completed surveys were from organizations located in the City of Cleveland (60 percent). More than one-quarter (27 percent) came from organizations located in Portage, Summit, Lake, Lorain, Medina and Geauga Counties. Organizations from Cuyahoga County, but not Cleveland, comprised the remaining 13 percent of completed surveys.

Audience Survey

The *Audience Survey* provided a composite picture of the audiences of Northeast Ohio arts and cultural attractions during the summer and fall of 1998. A total of 6,013 completed surveys were collected at 59 arts and cultural events between May and November 1998. A maximum of 100 surveys from each event were used to analyze findings. In those instances in which more than 100 surveys were returned, a randomly selected sample was drawn. The final analysis data set included 4,840 cases.

The questionnaire was a self-administered form that respondents completed in less than five minutes. In order to ensure a representative selection of event participants, individuals were randomly chosen, based on the estimated total attendance of the event. This method insured that individuals who arrived at an event later had the same chance of being surveyed as those who arrived early. Completed questionnaires were reviewed and blanks or inappropriately completed questionnaires were discarded.

Several sub-groups were distinguished for this analysis. Visitors and Northeast Ohio residents were compared. The Audience Survey asked respondents whether they lived in the Cleveland area or were just visiting. The resulting sub-groups were compared with reported ZIP codes and found to be highly related, indicating that individuals who said they were visitors lived outside the seven county region. The "Visitors" sub-group represented 25 percent of the total sample.

The cases were grouped based on frequency of attendance. Respondents who reported attending a maximum total of four events (within the past 12 months) were classified as "infrequent attendees"; those attending more than four events were classified as "frequent attendees."

Appendix A: Organizational Survey Participants

American-Slovenian Polka Foundation	Music & Performing Arts at Trinity Cathedral
Arts Management Program - Mandel Center	Musical Arts Association (The Cleveland Orchestra)
Broadway School of Music & the Arts	Nature Center at Shaker Lakes
Center for the Study of World Music	Near West Theatre
Choral Spectrum (Oberlin)	North Coast Pipe Band
Cleveland Center for Contemporary Art	Northern Ohio Youth Orchestra
Cleveland Chamber Symphony	PACT Professional Alliance of Cleveland Theaters
Cleveland International Piano Competition	Playhouse Square Foundation
Cleveland Metroparks Zoo	Radio Station WCLV
Cleveland Metroparks, Outdoor Education Division	Radio Station WKSU-FM
Cleveland Museum of Natural History	Rock and Roll Hall of Fame and Museum
Cleveland Opera	Summit Choral Society
Cleveland Public Theatre	The Cleveland Music School Settlement
Cleveland Restoration Society	The Cleveland Cultural Coalition
Cleveland San Jose Ballet	The Cleveland Institute of Music/Preparatory & Continuing Education Division
Committee of Public Art	The Cleveland Museum of Art
Cudell Improvement, Inc/Clifton Arts & Musicfest	The Cleveland Play House
Ensemble Theatre	The Great Lakes Theater Festival
Fine Arts Association	The Health Museum of Cleveland
Great Lakes Science Center	The Holden Arboretum
Heritage Brass Quintet	The Medina County Arts Council, Inc.
Hungarian Scout Folk Ensemble	The Repertory Project
Inventure Place	The Sculpture Center
Lyric Opera Cleveland	The Western Reserve Historical Society
Medina County Schools Fine Arts Tour	Theatre Labyrinth
Mentor Performing Concert Series	

Appendix B: Audience Survey Participants

"Events"

Organization Name	Number of Completed Surveys	Percent of Total
Apollo's Fire	69	2.16%
Baldwin Wallace Summer Theatre	100	3.13%
Beck Center for the Arts	81	2.54%
Blossom Music Center (3 events)	281	8.79%
Brunswick Cultural & Performing Arts	50	1.56%
Cain Park	82	2.57%
Cleveland Botanical Garden	100	3.13%
Cleveland Center for Contemporary Art	34	1.06%
Cleveland Jazz Orchestra	100	3.13%
Cleveland Opera	86	2.69%
Cleveland Orchestra (4 administrations)	350	10.95%
Cleveland Playhouse	100	3.13%
Cleveland Pops Orchestra @ Playhouse Square	100	3.13%
Cleveland Public Theatre	29	0.91%
Cleveland Zoological Society	100	3.13%
DANCE Cleveland @ Cain Park	100	3.13%
Fairmount Fine Arts Center	20	0.63%
Fine Arts Association	100	3.13%
Karamu House	52	1.63%
KSU Theater Department	100	3.13%
Lorain Palace Civic Center	74	2.32%
Lyric Opera	100	3.13%
Medina County Historical Society	21	0.66%
Music and Performing Arts @ Trinity Cathedral	97	3.04%
Near West Theater	61	1.91%
Ohio Ballet	100	3.13%
Playhouse Spuare Foundation (2 administrations)	200	6.26%
Poets League of Greater Cleveland	25	0.78%
Sculpture Center	100	3.13%
Singers Club of Cleveland	100	3.13%
Stan Hywet Hall & Gardens (2 administrations)	183	5.73%
Stocker Arts Center	100	3.13%
Total	**3195**	**100%**

"Destinations"

Organization Name	Number of Completed Surveys	Percent of Total
Akron Art Museum	33	2.01%
Berea Art Festival	99	6.02%
Broadway School of Music and the Arts	5	0.30%
Cleveland Health Education Museum	100	6.08%
Cleveland Metroparks Zoo	100	6.08%
Cleveland Museum of Art (3 Exhibits)	300	18.24%
Cleveland Museum of Natural History	58	3.53%
Craft Fair @ Hathaway Brown	100	6.08%
Geauga County Historical Society (2 Events)	197	11.98%
Great Lakes Science Center*	100	6.08%
Holden Arboretum	86	5.23%
Julia de Burgos Cultural Education and Art Center	38	2.31%
KSU University Museum	29	1.76%
Rock and Roll Hall of Fame (2 administrations)	200	12.16%
SPACES	100	6.08%
Western Reserve Historical Society	100	6.08%
Total	**1645**	**100%**

* Three questions specific to the Great Lakes Science Center were administered at their site and are not included in this report.

Appendix C: ZIP Codes by Frequency Among Audience Survey Participants

ZIP	USPS Geographic Associations	Number
44118	Cleveland, Cleveland Heights, East Cleveland, Shaker Heights	203
44122	Beachwood, Cleveland, Highland Hills, Shaker Heights, University Heights	165
44120	Cleveland, Shaker Heights	125
44107	Lakewood	119
44124	Cleveland, Lyndhurst, Mayfield Heights, Pepper Pike	115
44106	Cleveland, Cleveland Heights	114
44121	Cleveland, Cleveland Heights, South Euclid	100
44060	Mentor, Mentor-on-the-Lake	81
44022	Bentleyville, Chagrin Falls, Moreland Hills	80
44236	Hudson	80
44136	Strongsville	75
44035	Elyria, North Ridgeville	71
44017	Berea	69
44116	Rocky River	69
44094	Kirtland, Willoughby	66
44102	Cleveland	64
44212	Brunswick	59
44256	Medina	59
44313	Akron	58
44240	Kent	55
44130	Middleburgh Heights, Parma, Parma Heights	54
44140	Bay Village	52
44224	Stow, Cuyahoga Falls, Silver Lake	51
44145	Westlake, Cleveland	45
44143	Cleveland, Euclid, Highland Heights, Mayfield, Mayfield Hgts.	43
44095	Eastlake, Lakeline, Timberlake, Willoughby, Willowick	41
44139	Solon	41
44202	Aurora, Reminderville	40
44024	Chardon	39
44070	North Olmsted	39
44111	Cleveland	39
44134	Cleveland, Parma	39
44012	Avon Lake	37
44113	Cleveland	35
44129	Cleveland, Parma	34

44333	Akron, Fairlawn	32
44023	Chagrin Falls	31
44105	Cleveland, Garfield Heights, Newburgh Heights	31
44126	Cleveland, Fairview Park	30
44109	Cleveland	29
44138	Olmsted Falls	28
44112	Cleveland, Cleveland Heights, East Cleveland	27
44141	Brecksville	27
44108	Cleveland, Bratenahl	26
44039	North Ridgeville, Elyria	25
44110	Cleveland, East Cleveland	25
44303	Akron	25
44067	Northfield, Sagamore Hills	24
44077	Painesville, Concord	24
44720	Canton, North Canton	24
44133	North Royalton	23
44074	Oberlin	22
44144	Cleveland, Brooklyn	22
44146	Bedford, Bedford Heights, Cleveland, Oakwood Village, Walton Hills	22
44135	Cleveland	20
44089	Vermilion	19
44123	Euclid	19
44128	Cleveland, Bedford Heights, Garfield Heights, Highland Hills, North Randall	19
44685	Uniontown	19
44052	Lorain	18
44131	Independence, Brooklyn Heights, Cleveland, Parma, Seven Hills	18
44223	Cuyahoga Falls	18
44125	Cleveland, Garfield Heights, Valley View	17
44142	Brookpark, Cleveland	17
44147	Broadview Heights	17
44266	Ravenna	17
44310	Akron	16
44011	Avon	15
44040	Gates Mills	15
44137	Maple Heights	15
44004	Ashtabula	14
44026	Chesterland	14
44001	Amherst, South Amherst	13
44021	Burton	13
44053	Lorain	13

44092	Wickliffe	13
44114	Cleveland	13
44132	Euclid	13
44221	Cuyahoga Falls	13
44087	Twinsburg	12
44320	Akron	12
44691	Wooster	12
44072	Novelty, Russell	11
44103	Cleveland	11
44119	Cleveland, Euclid	11
44281	Wadsworth	11
44302	Akron	11
44241	Streetsboro	10
44709	Canton, North Canton	10