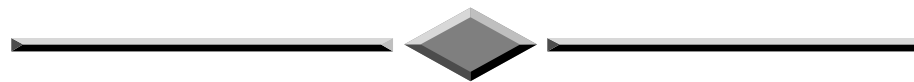


Strengthening Arts & Culture:

Familiarity, Use & Favorability of Sector-Enhancing Activities

Community Partnership for Arts & Culture (CPAC)



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May, 2008



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Executive Summary

A total of 602 people completed an on-line survey in March of 2008. Most of the respondents (387) were affiliated with the arts and culture sector professionally either as individual artists or via their employment at an arts and cultural organization (“arts-affiliated”). The remaining 215 respondents were familiar with the sector via their own alternative involvement in the community, but were not directly tied to the sector professionally (“non arts-affiliated”). Respondents represented a wide array of arts and cultural organizations (in terms of size and type), held differing roles within those organizations, and were drawn from a diverse group of professions outside of the arts and culture sector. The objectives of the survey were to: 1) assess awareness and use of on-going supportive programs for the arts and culture industry sector; and 2) identify gaps in services which are believed to be important for the arts and culture sector’s stability and vitality.

The major findings of the study are below:

Current Support Programs for the Arts and Culture Sector

•*Awareness of Programs:* The COSE Arts Network had the highest levels of awareness in this study: 74% of the arts-affiliated respondents were aware of this program. Both arts-affiliated and non arts-affiliated respondents, as a group, had high levels of awareness of the Cuyahoga Arts & Culture general operating support grants (71%/63%) and the Cuyahoga Arts & Culture (CAC) project support grants (66%/59%). The Artist as an Entrepreneur Institute (AEI) also enjoyed high levels of awareness among arts-affiliated respondents (57%). Half (50%) of the arts-affiliated respondents were aware of the Arts and Cultural Roundtable; somewhat fewer of non arts-affiliated respondents were aware of the Roundtable (31%).

- As a whole, respondents were more familiar with the publicly supported programs designed to support the arts and culture industry sector than the privately supported programs.

•*Use of Programs:* Fifty percent of the arts-affiliated respondents had participated, at some level, in the CAC General Operating Supports Program in the past year. Another 24% expect to participate in the coming year. Somewhat fewer (30%) participated in the CAC Project Support Grants program in the past year, while 22% expect to participate in the coming year.

- Almost all of the publicly and privately supported arts and cultural sector support programs are expected to show increased use in the coming year, with the notable exception of the AEI (23% of respondents had already participated in the AEI, and this service has likely reached a saturation point). The two services which had the highest future “intended use” measures were the Arts and Cultural Roundtable and Market Research.

Executive Summary

Community Partnership for Arts and Culture (CPAC)

- Most (81%) of the arts-affiliated respondents were “somewhat” or “very” familiar with CPAC. Somewhat fewer (60%) of the non arts-affiliated respondents were so familiar. However, CPAC’s website is not a regularly visited site by either arts- or non arts-affiliated respondents.

What Programs/Services are Most Important in the Future for NE Ohioans?

- Reflective of their past usage levels, respondents, as a group, saw the CAC Grants (Operating and Project) as the most important programs for “advancing and strengthening NE Ohio’s economy, educational systems, and quality of life.” The COSE Arts Network was seen as the second most important program going forward.

What Programs/Services are Most Important in the Future for the Arts and Culture Industry Sector?

- Public funding for the arts (59% for arts-affiliated/50% for non arts-affiliated) and Arts education in elementary, middle and high schools (57%/56%) were seen as the most important efforts to support the arts and culture sector. “State arts funding” was seen as important by almost as many (46%), followed by “arts and culture tourism and convention center efforts” (40%/42%).

What Strategic Partnerships Should the Arts and Culture Sector Form?

- A strong majority of respondents (arts-affiliated) felt that engagement with the “Education” sector was “very important” to the arts and culture sector (87%), and an additional 12% felt it was “somewhat important.” “Community Development” was viewed as the second most critical sector for engagement, followed very closely by “Economic Development,” “Business,” and “Humanities and Literacy.” At least 96% of respondents felt that engagement with each of these industries was either “very” or “somewhat” important for strategic alliances with the arts and culture sector. Respondents, as a group, expect much of the arts and culture sector in terms of engagement with other sectors.

Executive Summary

Activism by Members of the Arts and Culture Sector

- For the most part, those involved with arts and culture are a very busy group in terms of activism, and showed great appetite for maintaining or even increasing their levels of activism. Fifty percent interacted with a public official in a professional capacity within the past year, and 49% sent a letter to a public official. Forty-two percent donated money to an issue campaign, and 38% donated to a candidate's campaign.
 - Service as a board member was relatively low (30% for an arts and cultural non-profit and 19% for a non-arts and cultural non-profit). However, 81% expressed at least some willingness to serve as a board member. Therefore, the existing arts and culture community should be seen as a ripe source for future board positions within the sector.
- Along with board membership, respondents showed great interest in “volunteering at arts and culture sector service days” (81%) and for “tours which highlight issues which face NEO arts and culture sector” (79%).

Perceptions on the Health of the Sector

- This respondent base proved to be a knowledgeable and active group – both those directly affiliated with the arts and those who are only exposed to arts and cultural issues via their general involvement in community issues. That being said, they had a fairly negative impression of the “state of the industry” for NE Ohio's arts and culture sector – about two-thirds felt that its “vitality and financial stability” were, at best, “fair” (as opposed to “good” or “excellent”). They expected little change in that perception within the next year.
- In regard to NE Ohio in general, many respondents saw a reversal in trends on the horizon: While about half of the respondents felt that the “quality of life in NE Ohio” had “gotten worse” in the past five years, only about 20% felt that trend would continue. Forty percent were more optimistic and expected the quality of life to get “better” in the next five years.

Introduction

Objectives

- Determine levels of familiarity, use, and favorability of arts and culture sector-building activities among those imbedded in the arts and culture sector/community (i.e., artists and those who work for arts and cultural organizations).
- Determine levels of familiarity, use, and favorability of arts and culture sector-enhancing activities among those familiar with the arts and culture sector/community (i.e., those who are active in the community in general, but are neither artists nor work for arts and cultural organizations).
- Gather opinions on what types of activities should be focused on in the future in order to continue to support and enhance the arts and culture sector in NE Ohio.

Methods

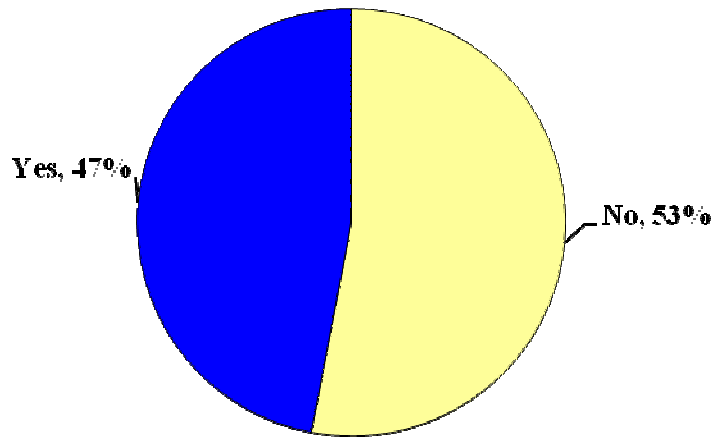
- Survey completed via on-line questionnaire in March of 2008.
- Total of 2,700 potential respondents were sent an email invitation to participate in a survey on “Arts and Culture in Northeast Ohio.” The intention was to include both those who worked in arts and culture and those who did not. Potential respondents were drawn from a compiled universe of email lists from:
 - Community Partnership for Arts and Culture (CPAC’s) On-line Community (Email Subscribers)
 - Professional contacts of CPAC staff
 - The Cleveland Neighborhood Development Coalition
 - Public officials in NE Ohio
 - The Cleveland City Club
- A total of 602 respondents completed the survey (22%).
- CPAC was identified as the sponsor of the study.
- This report contains the overall results of the study, focusing on the difference in responses between arts-affiliated and non arts-affiliated respondents. Detailed findings per the following demographic categories can be found under separate cover:
 - Gender
 - Age
 - Region within NE Ohio
 - Race/Ethnicity

Section I: Respondent Demographics

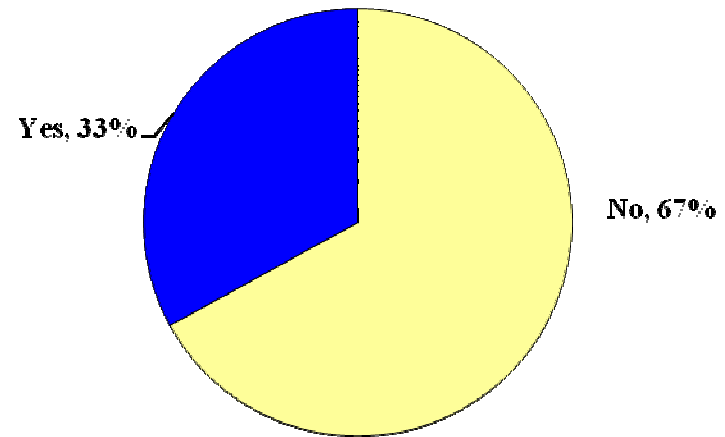
Demographics

Employment *n* = 602

Q1a: Are you employed by an organization whose primary mission is related to arts and culture?



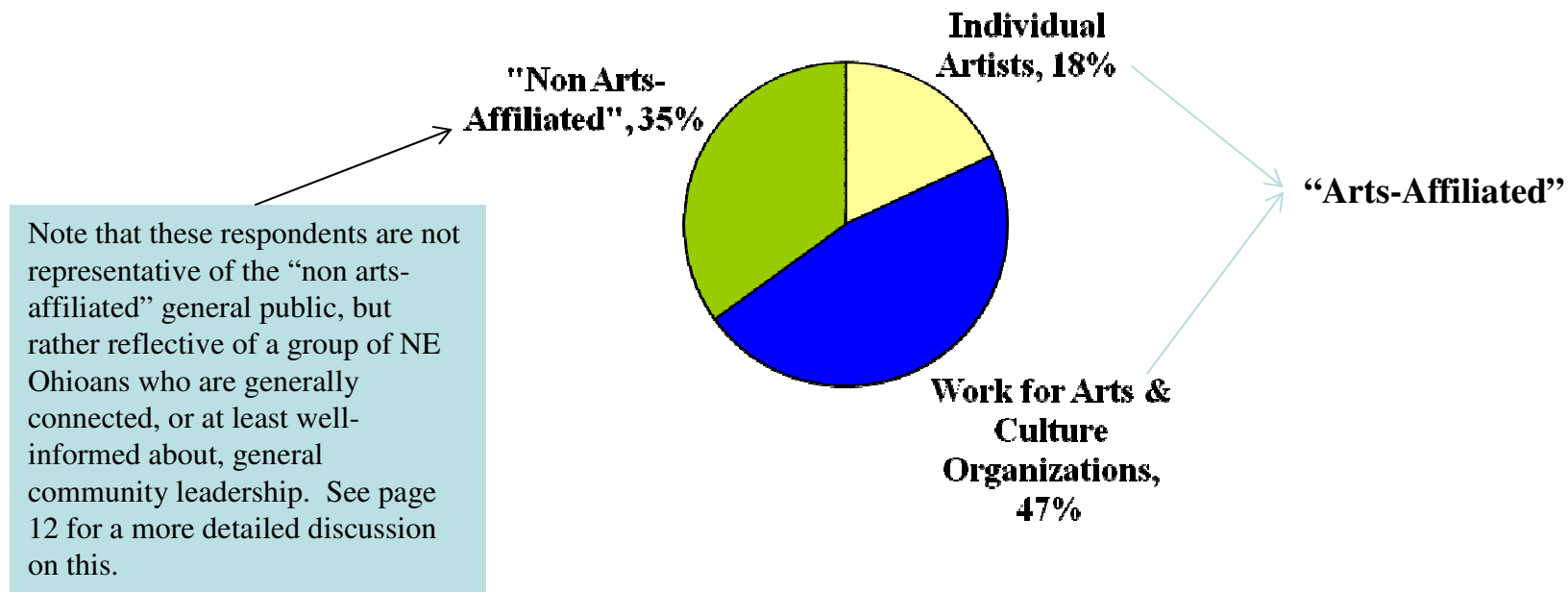
Q2: Are you a practicing artist of any discipline (including, but not limited to, literary, media, performing, and visual artists)?



Demographics

Summary of Respondent Groups *n* = 602

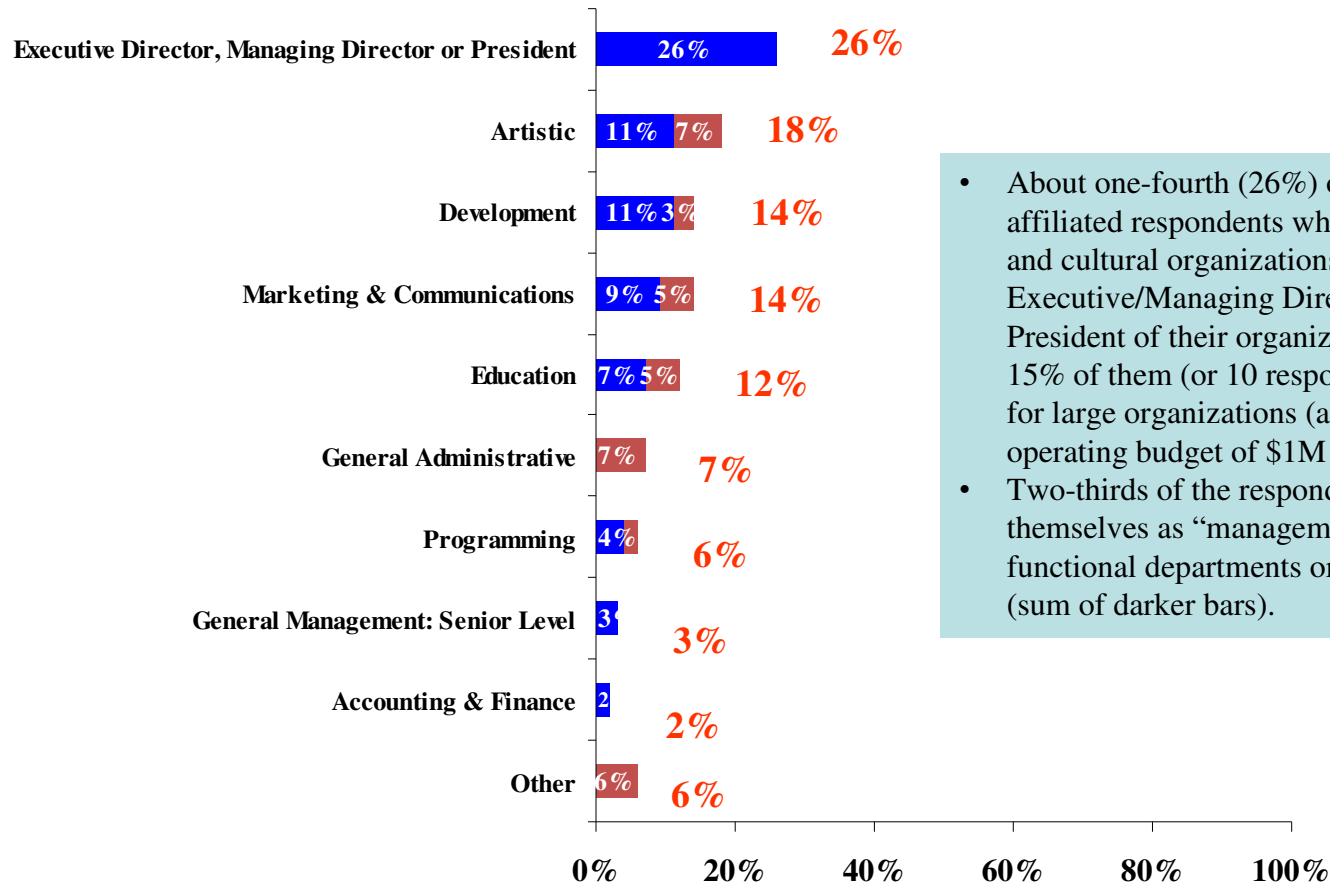
Based on responses regarding their profession, respondents were categorized as either “non arts-affiliated” or “arts-affiliated,” and were routed to one of two sections of the questionnaire appropriate to their connection to arts and culture (Individual Artists and those who work for arts and cultural organizations were routed to one section of the questionnaire; Non art-affiliated respondents were routed to the other (shorter) section):



Demographics

Position Within Arts & Culture Organization n = 259

Q1b: Please select the position that most closely matches your position within that organization:



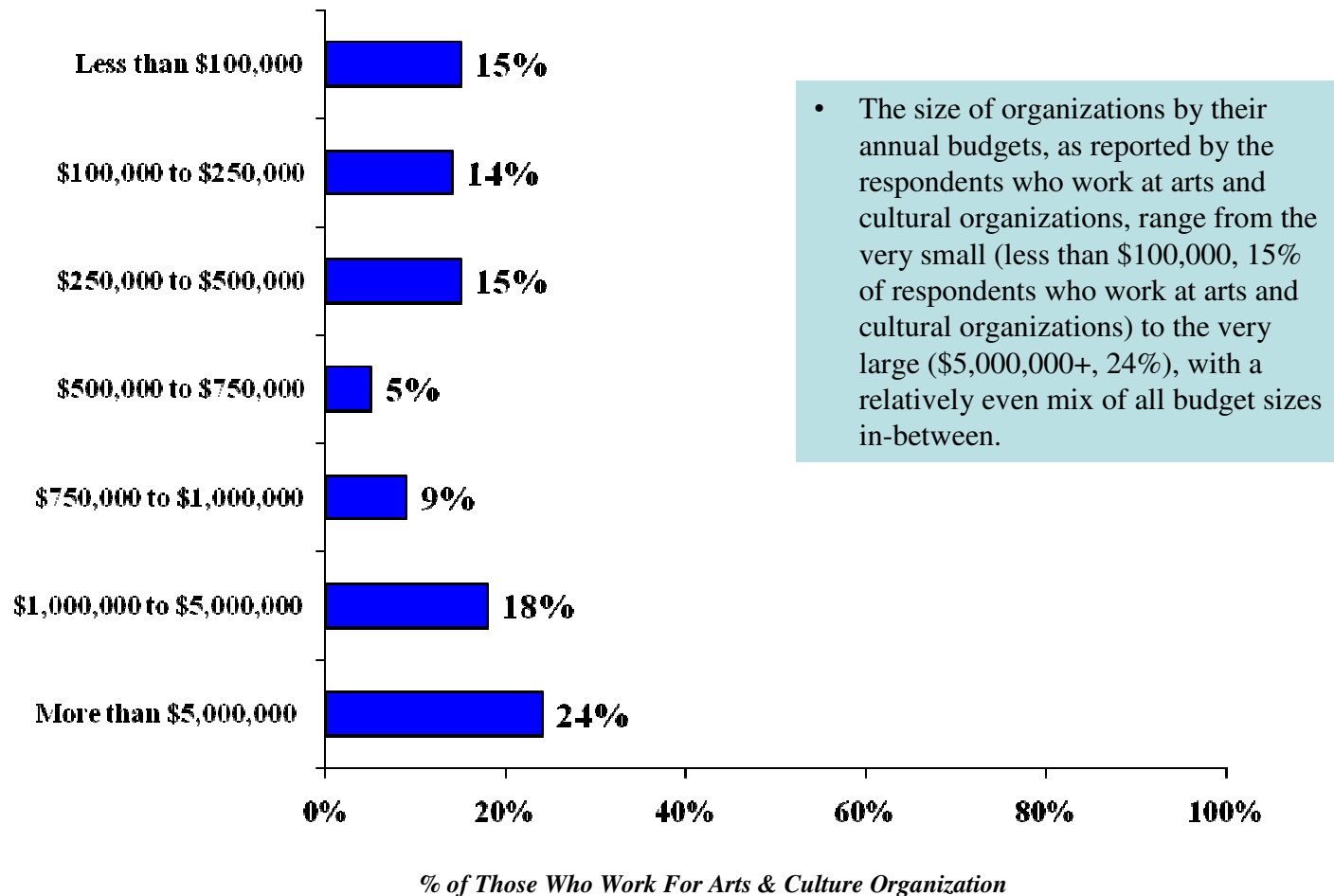
- About one-fourth (26%) of the arts-affiliated respondents who work for arts and cultural organizations are the Executive/Managing Director or President of their organization. About 15% of them (or 10 respondents) work for large organizations (annual operating budget of \$1M+).
- Two-thirds of the respondents described themselves as “management” for their functional departments or organizations (sum of darker bars).

% of Those Who Work For Arts & Culture Organization

Demographics

Operating Budget (Arts & Cultural Organization) *n = 257*

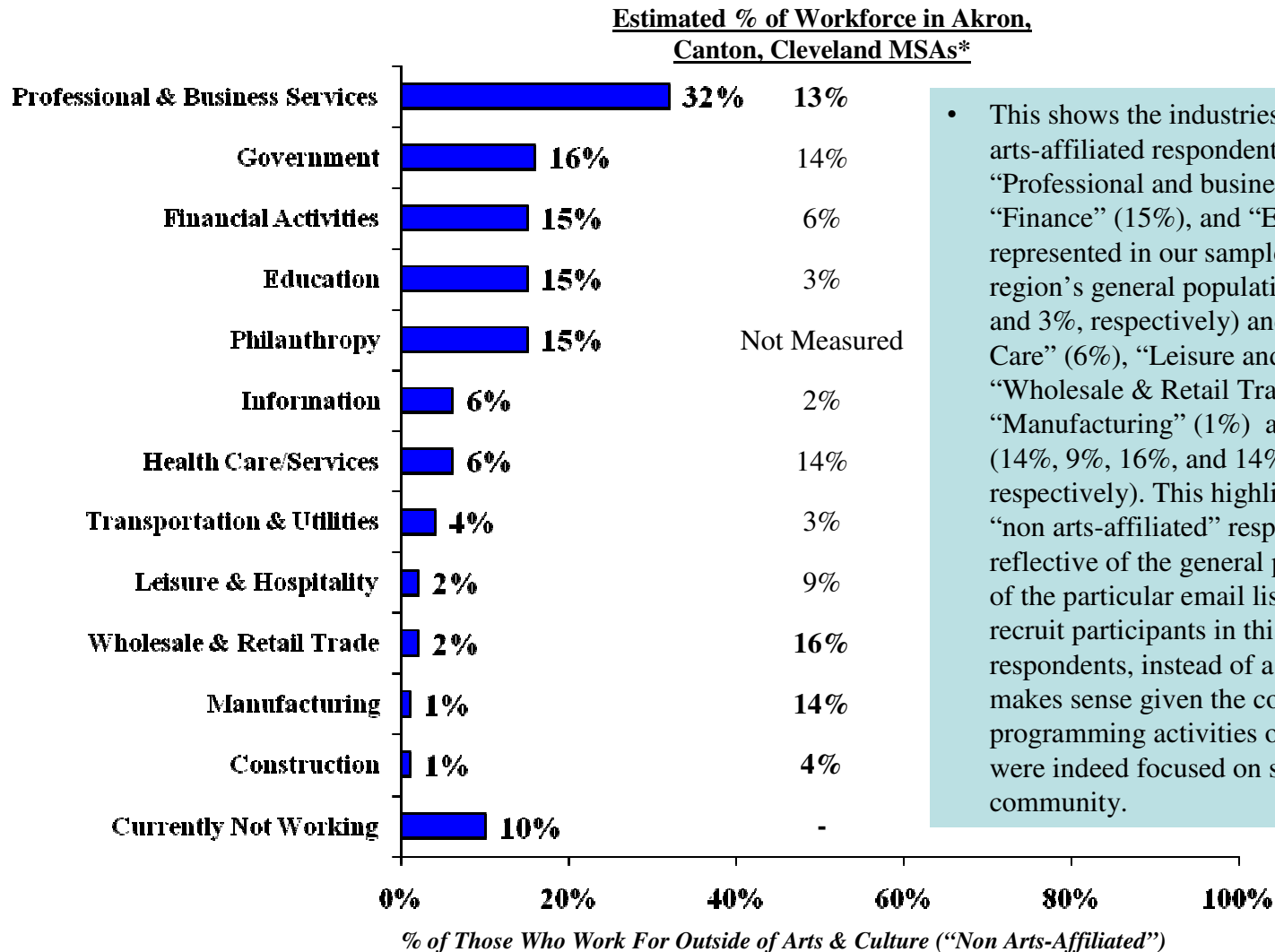
Q1c: Approximately, what is your organization's total annual operating budget?



Demographics

Industry (Non Arts-Affiliated) n=215

Q3a: Which of the following most accurately describes the industry in which you work?



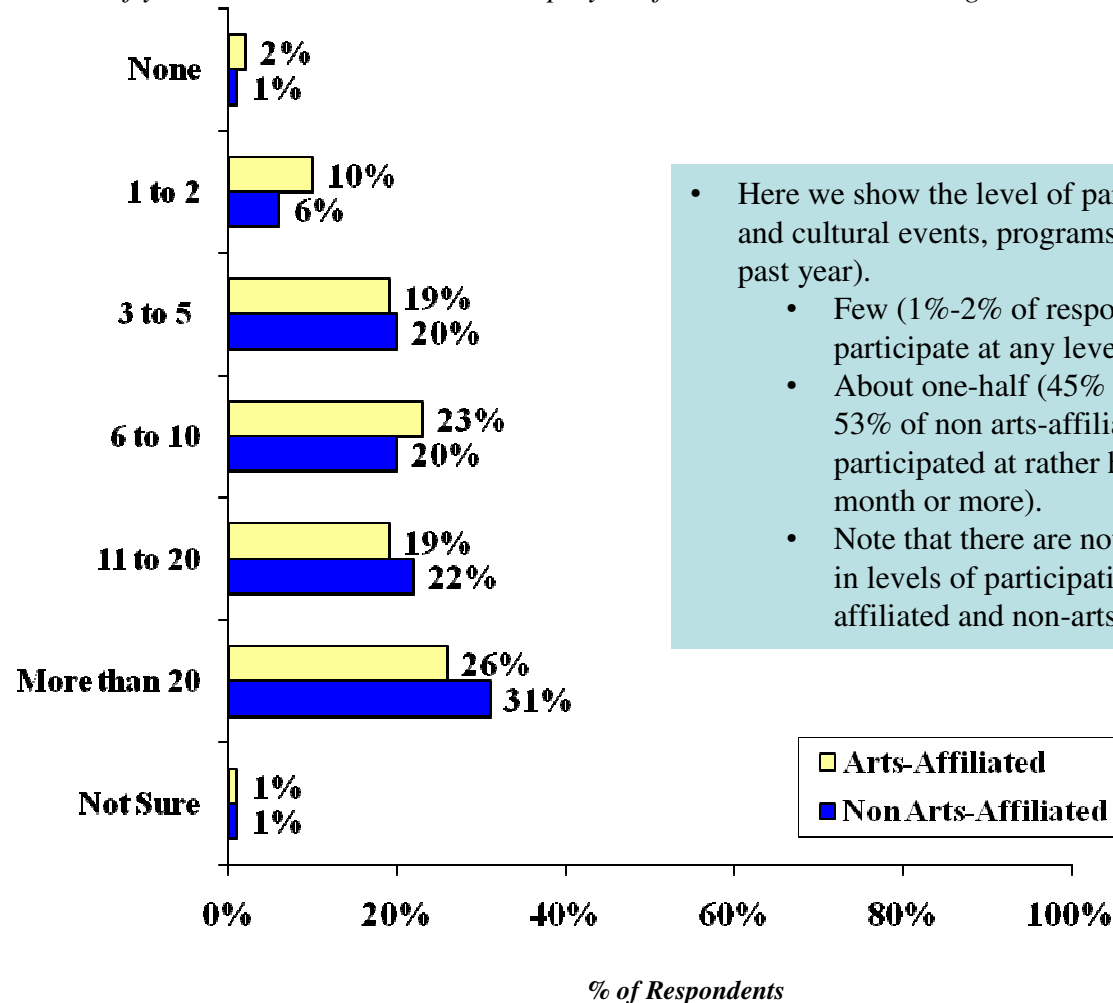
- This shows the industries worked in for the “non arts-affiliated respondents.” Note that those in “Professional and business services” (32%), “Finance” (15%), and “Education” (15%) are over-represented in our sample as compared to the region’s general population workforce (13%, 6%, and 3%, respectively) and that those in “Health Care” (6%), “Leisure and Hospitality” (2%), “Wholesale & Retail Trade” (2%) and “Manufacturing” (1%) are quite underrepresented (14%, 9%, 16%, and 14% of the general workforce, respectively). This highlights that the sample of “non arts-affiliated” respondents is not completely reflective of the general population, which is a result of the particular email lists (see page 6) used to recruit participants in this study. This targeting of respondents, instead of a general population survey, makes sense given the communication and programming activities of CPAC in past years which were indeed focused on specific segments of the community.

Section II: Personal Participation in Arts and Culture Sector Activities

Familiarity with Arts & Culture

Arts & Cultural Activity Participation in Last Year

(Non-Arts Affiliated) Q4: Approximately how many times have you participated in arts and cultural events, programs or activities in the past year? (Arts Affiliated) Q13: Approximately, how many times have you participated in arts and cultural events, programs, or activities in the past year, outside the realm of your work as an artist or an employee of an arts and cultural organization?



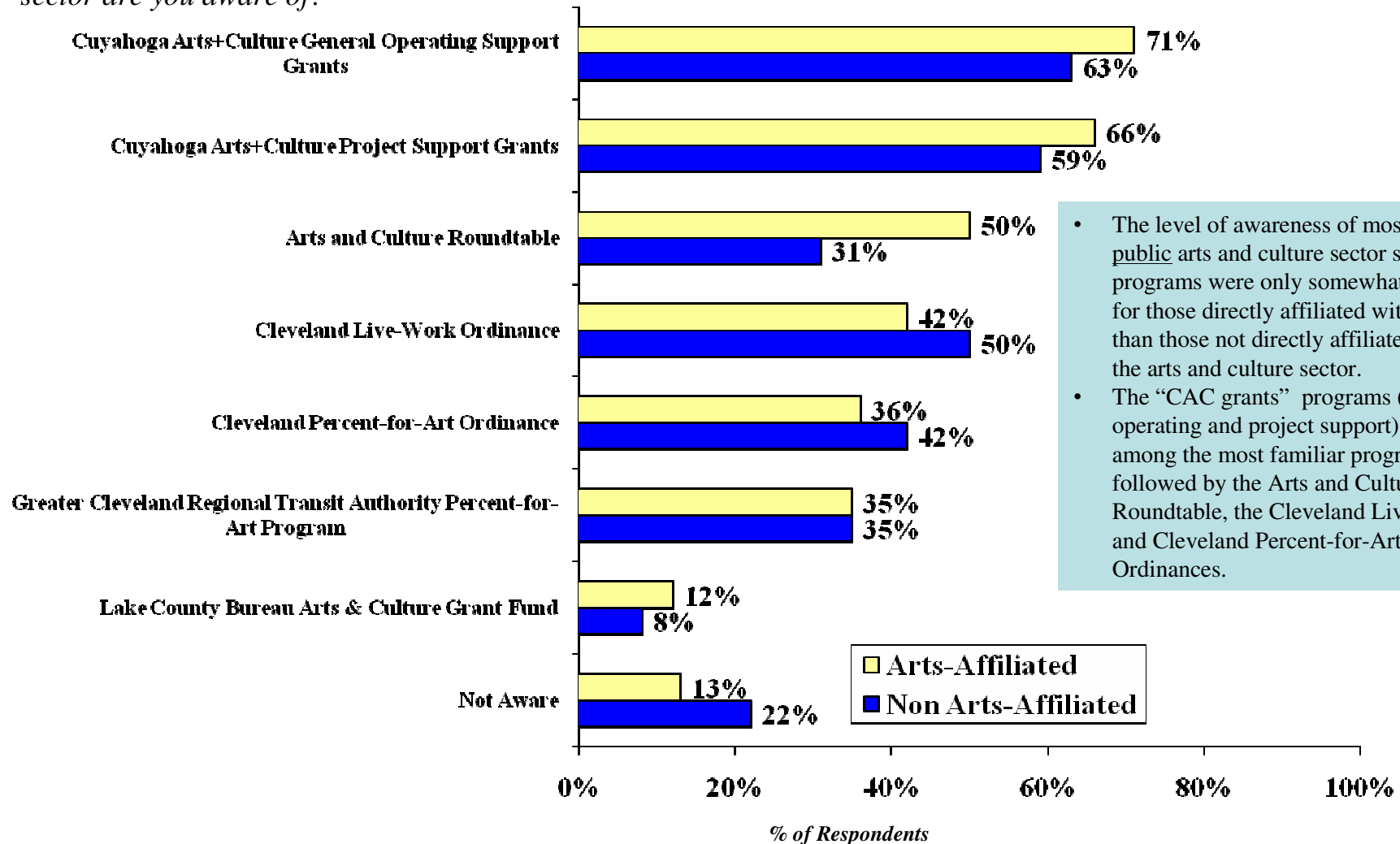
- Here we show the level of participation in local arts and cultural events, programs or activities (within the past year).
 - Few (1%-2% of respondents overall) did not participate at any level.
 - About one-half (45% of arts affiliated and 53% of non arts-affiliated) of respondents participated at rather high levels (about once a month or more).
 - Note that there are not significant differences in levels of participation between arts-affiliated and non-arts affiliated respondents.

Section III: Familiarity with Arts & Culture in Northeast Ohio

Familiarity with Arts & Culture Sector

Familiarity with Public Support Programs

Q5a; Q14a: Which of the following public support programs and services for Northeast Ohio's arts and culture sector are you aware of?

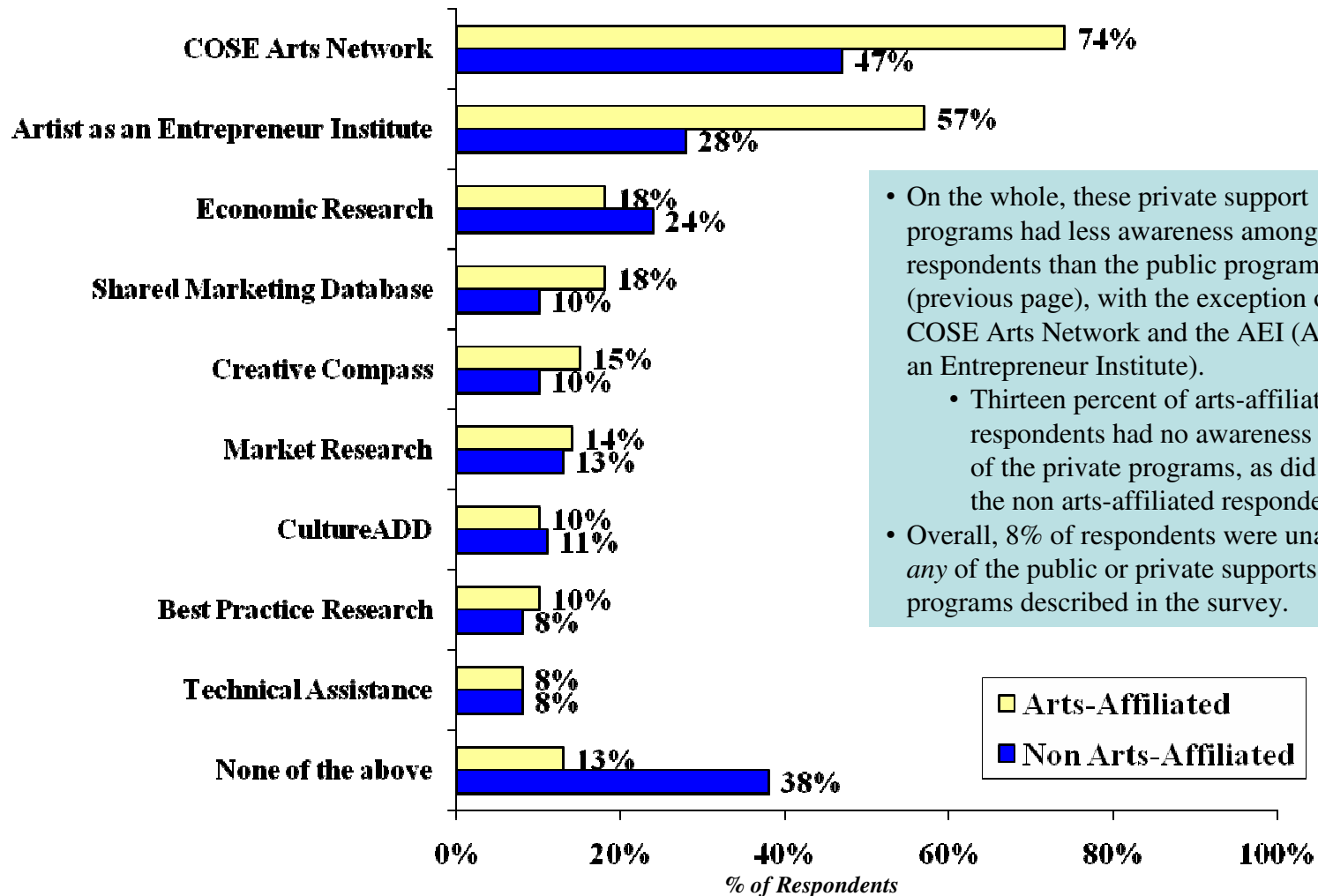


- The level of awareness of most of these public arts and culture sector support programs were only somewhat higher for those directly affiliated with the arts than those not directly affiliated with the arts and culture sector.
- The “CAC grants” programs (general operating and project support) were among the most familiar programs, followed by the Arts and Cultural Roundtable, the Cleveland Live-Work and Cleveland Percent-for-Art Ordinances.

Familiarity with Arts & Culture Sector

Familiarity with Private Support Programs

Q6a; Q15a: Which of the following private sector support programs and services for Northeast Ohio's arts and culture sector are you aware of?

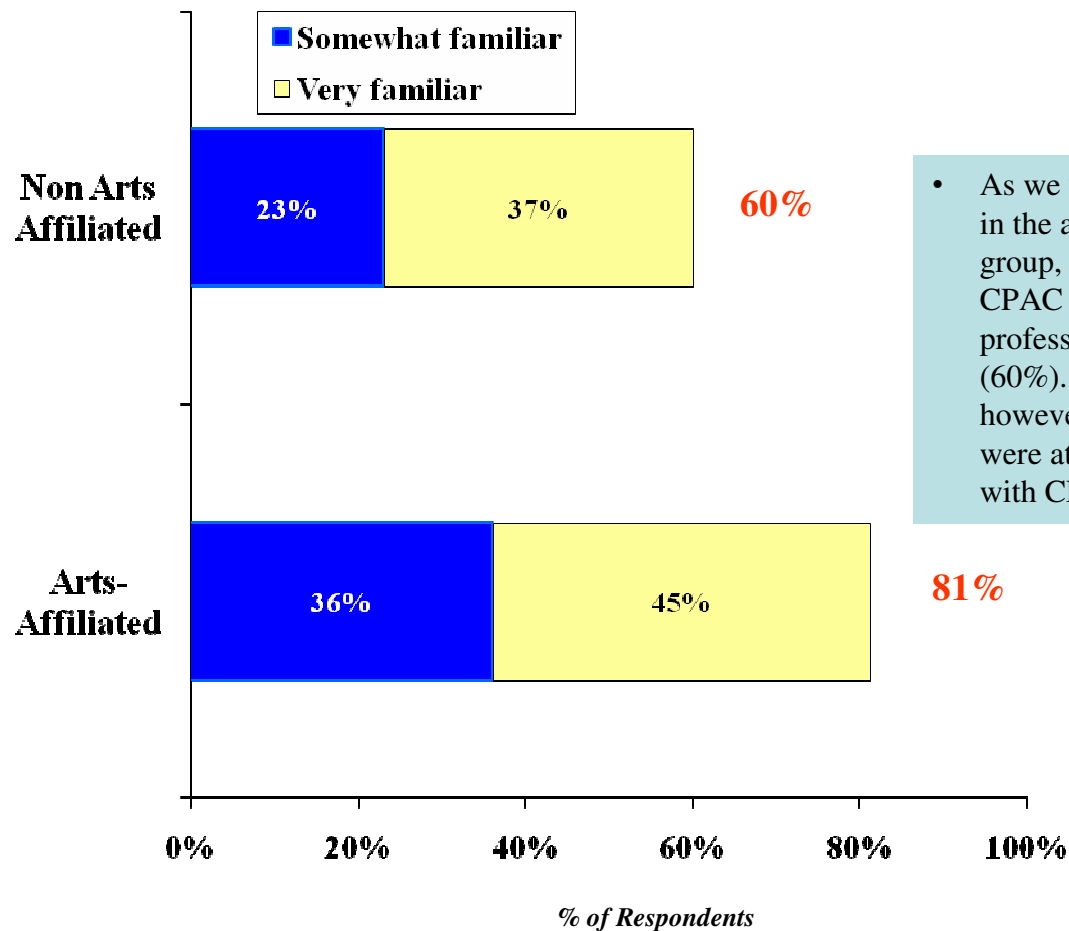


- On the whole, these private support programs had less awareness among the respondents than the public programs (previous page), with the exception of the COSE Arts Network and the AEI (Artist as an Entrepreneur Institute).
 - Thirteen percent of arts-affiliated respondents had no awareness of any of the private programs, as did 38% of the non arts-affiliated respondents .
- Overall, 8% of respondents were unaware of *any* of the public or private supports programs described in the survey.

Familiarity with Arts & Culture Sector

***Familiarity with CPAC
n = 324: Arts Affiliated, 191: Non Arts-Affiliated***

Q8; Q21: How familiar are you with the Community Partnership for Arts & Culture (CPAC)?

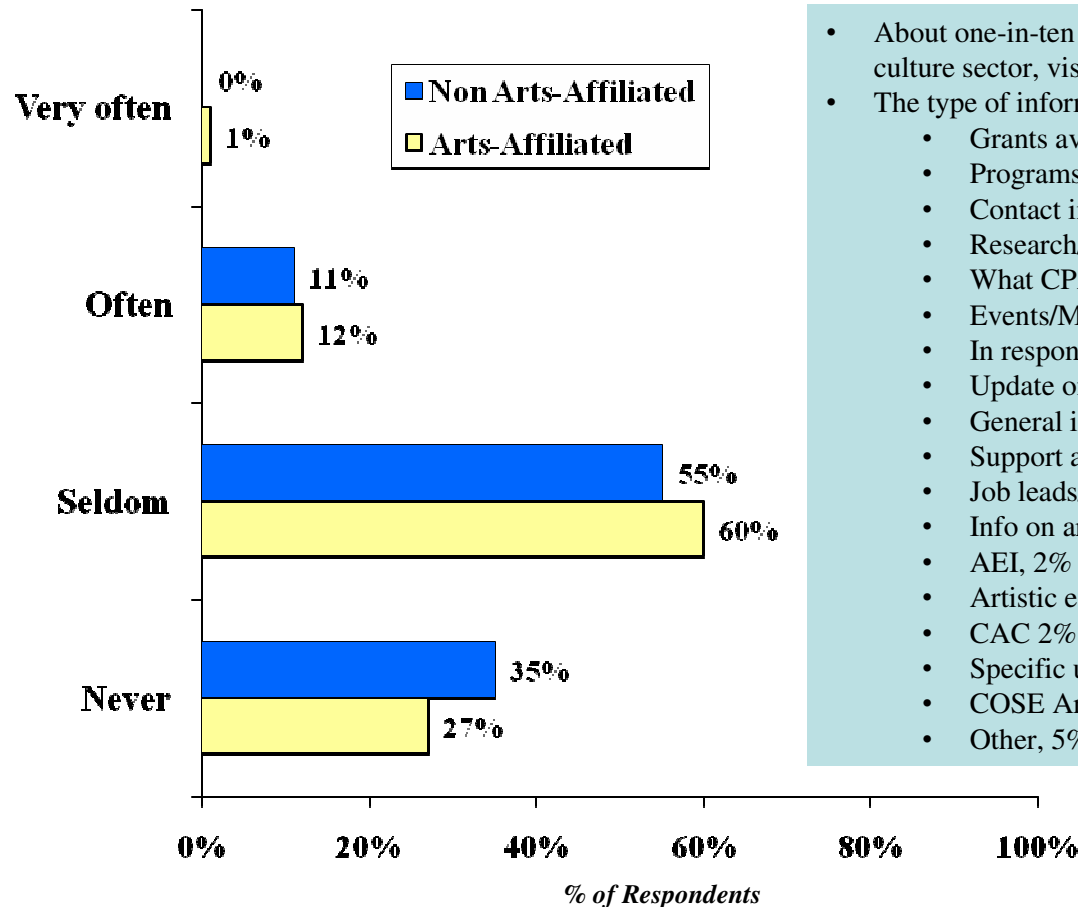


- As we would expect, those working in the arts and culture sector, as a group, are more familiar with CPAC (81%) than those who are not professionally affiliated with the arts (60%). Note that for both groups, however, a majority of respondents were at least “somewhat” familiar with CPAC.

Familiarity with Arts & Culture Sector

Frequency of Visitation CPAC Website n = 310: Arts-Affiliated, 112: Non Arts-Affiliated

Q9; Q23a-: How often do you visit the CPAC website? If you have visited CPAC's website, what types of information were you seeking?



- About one-in-ten respondents, regardless of their affiliation with the arts and culture sector, visit the CPAC website with any regularity.
- The type of information sought on the website, when visited, include:
 - Grants available/"how to"/deadlines, 21% of those who went to website
 - Programs/services availability, times, deadlines, 15%
 - Contact information, 11%
 - Research/Talking Points/Statistics, 10%
 - What CPAC does/offers, 9%
 - Events/Meeting places/Times, 7%
 - In response to emails received from CPAC, 6%
 - Update on issues/public policy, 5%
 - General information, 4%
 - Support available for individual artists, 3%
 - Job leads/Opportunities, 3%
 - Info on arts groups in area, 3%
 - AEI, 2%
 - Artistic events in area, 2%
 - CAC 2%
 - Specific upcoming events (Rustbelt), 1%
 - COSE Artists Network, 1%
 - Other, 5%

Familiarity with Arts & Culture Sector

Familiarity With, Use of, and Intended Use of Local Support Programs Arts-Affiliated Only (n=387)

Q16a; q16b: Which of the following programs and services have you/do you think you are likely to, participate in or take advantage of directly?

Programs/Services	% Aware	% Participated	% Likely To Participate In Next Year	
COSE Arts Network	74%	27%	27%	
Cuyahoga Arts & Culture General Operating Support Grants	71%	50%	24%	Shrinkage
Cuyahoga Arts & Culture Project Support Grants	66%	30%	22%	Shrinkage
Artist as an Entrepreneur Institute	57%	23%	19%	
Arts & Culture Roundtable	50%	16%	46%	Growth
Cleveland Live-Work Ordinance	42%	6%	8%	
Cleveland Percent-for-Art Ordinance	36%	4%	10%	Growth
Greater Cleveland Regional Transit Authority Percent-for-Art Program	35%	7%	13%	Growth
Economic Research	18%	15%	30%	Growth
Shared Marketing Database	18%	13%	27%	Growth
Creative Compass	15%	2%	20%	Growth
Market Research	14%	10%	40%	Growth
Lake County Visitors Bureau Arts & Culture Grant Fund	12%	5%	7%	
CultureADD	10%	3%	26%	Growth
Best Practices Research	10%	7%	40%	Growth
Technical Assistance	8%	5%	27%	Growth

Here we repeat the proportion of arts-affiliated respondents who are aware of various arts and cultural support programs (from pages 16 & 17) and add the proportion who participated in them previously (third column) and those who said they were likely to participate in them in the next year (fourth column).

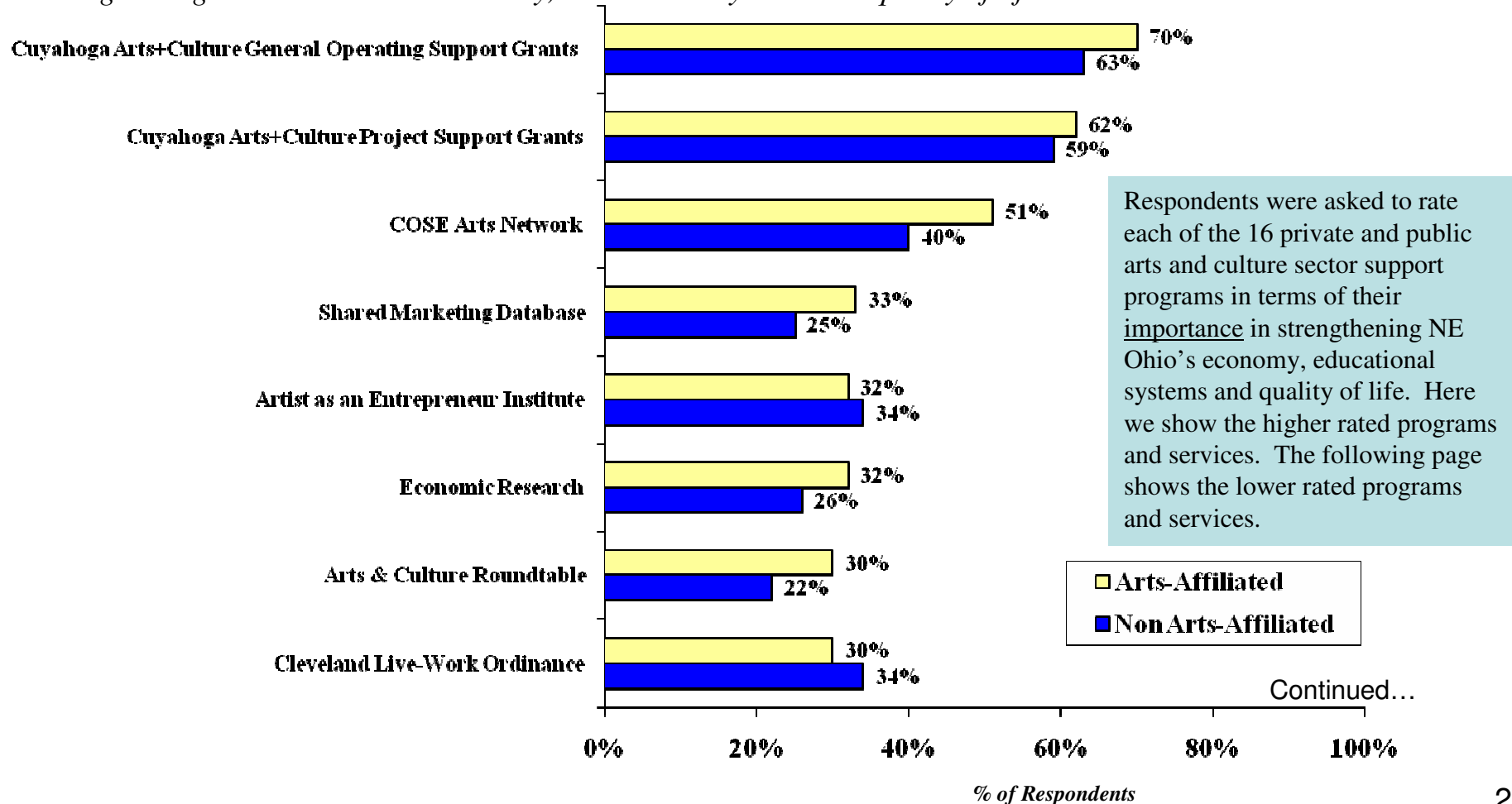
We also highlighted those programs in which we can expect lower levels of participation, or “shrinkage,” in the next year (specifically one of the grants programs, GOS, in which we would expect shrinkage since participation length is more than one year), and those we can expect increased participation in the next year (growth) (fifth column).

Section IV: Enhancing Northeast Ohio

Enhancing Northeast Ohio

Important Programs & Services to enhance Northeast Ohio's Economy, Educational Systems and Quality of Life (Most Important Programs)

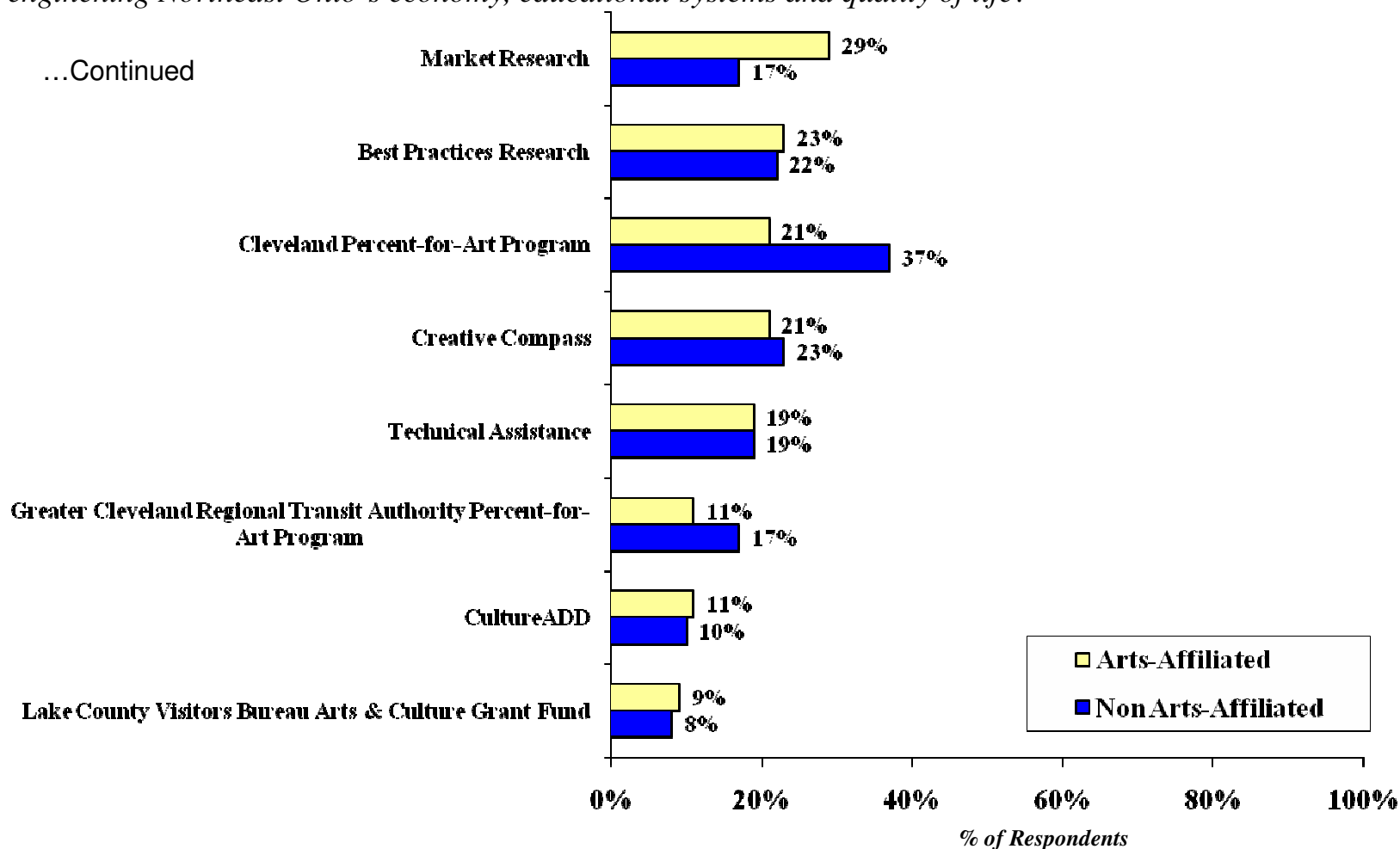
Q7; Q17: Among the following programs and services, which do you feel are the most important for advancing and strengthening Northeast Ohio's economy, educational systems and quality of life?



Enhancing Northeast Ohio

*(continued) Important Programs & Services to enhance Northeast Ohio's Economy, Educational Systems and Quality of Life
(Less Important Programs)*

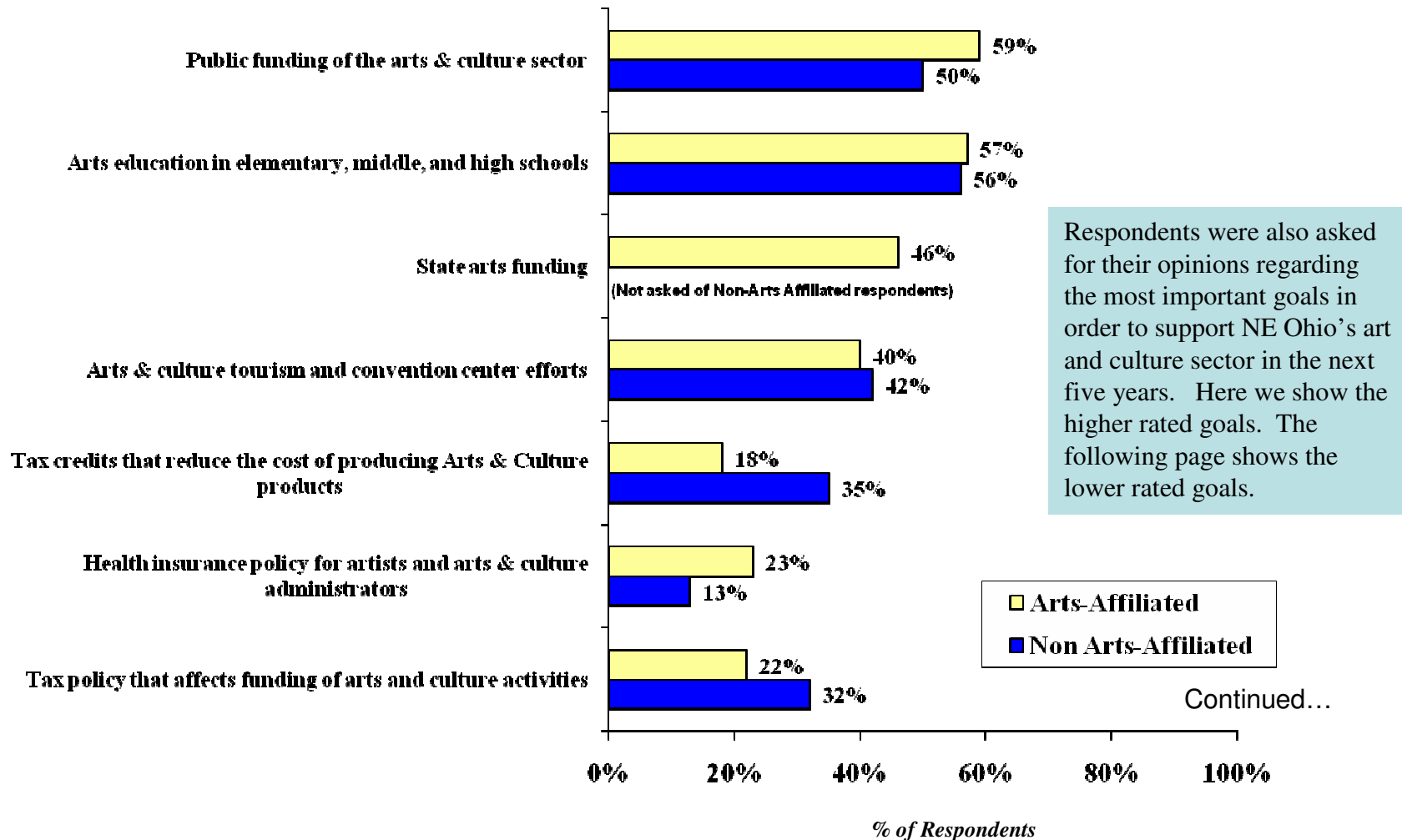
Q7; Q17: Among the following programs and services, which do you feel are the most important for advancing and strengthening Northeast Ohio's economy, educational systems and quality of life?



Enhancing Northeast Ohio

Most Important to Help Support & Advance Northeast Ohio Art & Culture Sector in Next 5 Years

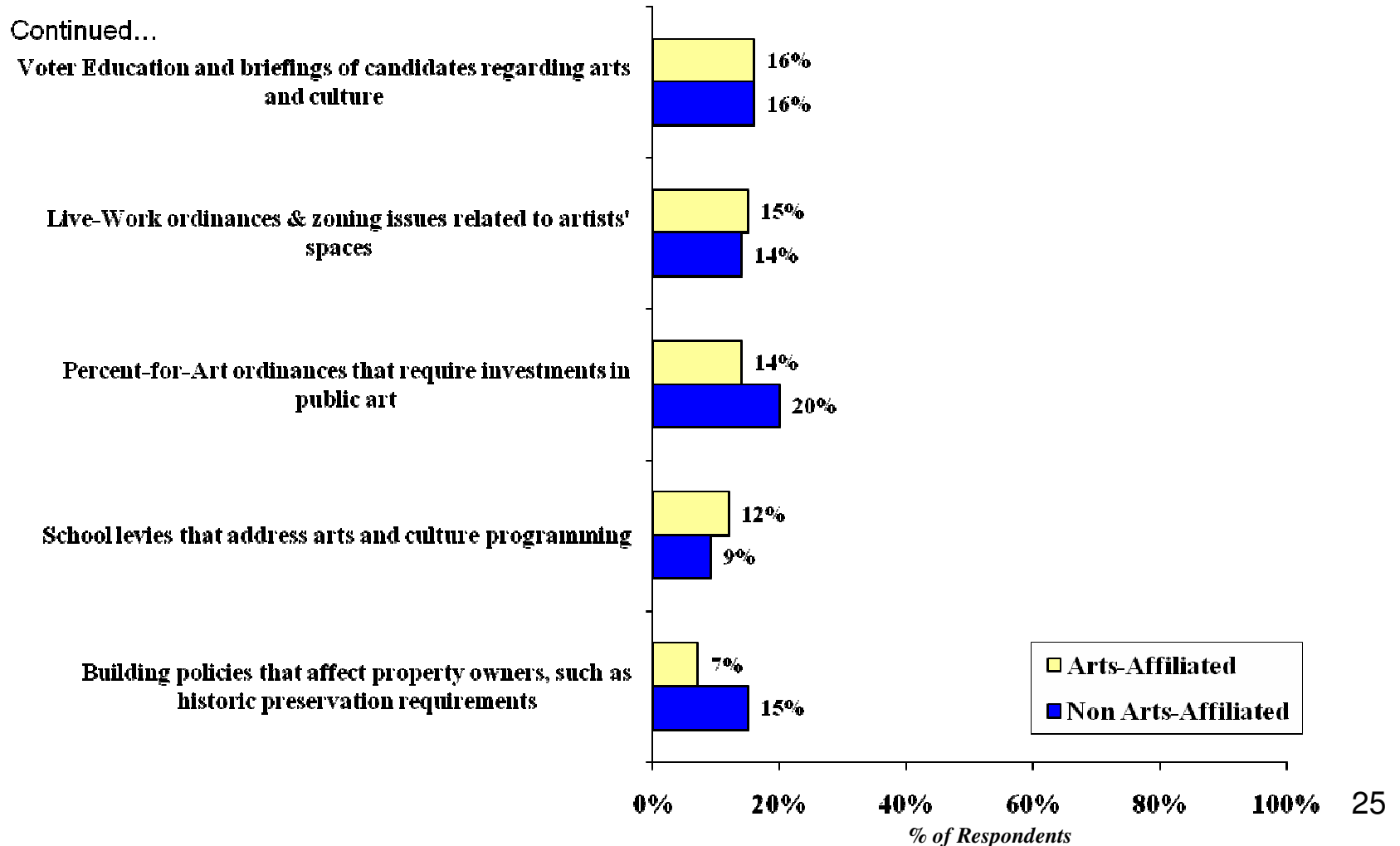
Q12a; Q18: In your opinion, which of the following would be the most important to help support and advance Northeast Ohio's art and culture sector in the next five years?



Enhancing Northeast Ohio

(continued) Most Important to Help Support & Advance Northeast Ohio Art & Culture Sector in Next 5 Years

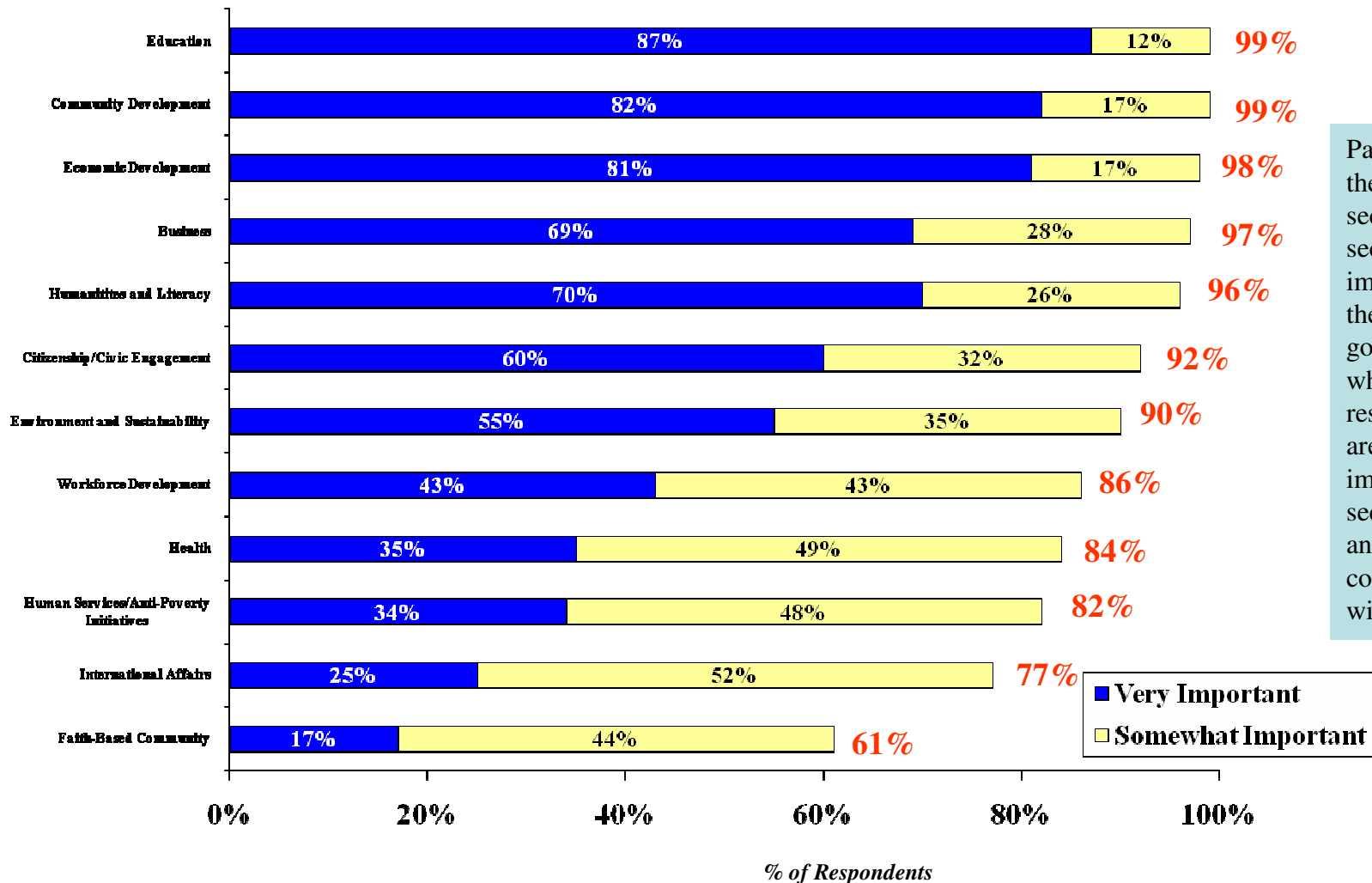
Q12a; Q18: In your opinion, which of the following would be the most important to help support and advance Northeast Ohio's art and culture sector in the next five years?



Enhancing Northeast Ohio

Importance of Engagement With Other Industries (Arts-Affiliated Respondents Only)

Q25 series: How important is increased engagement between these and the arts and culture sector/industry:



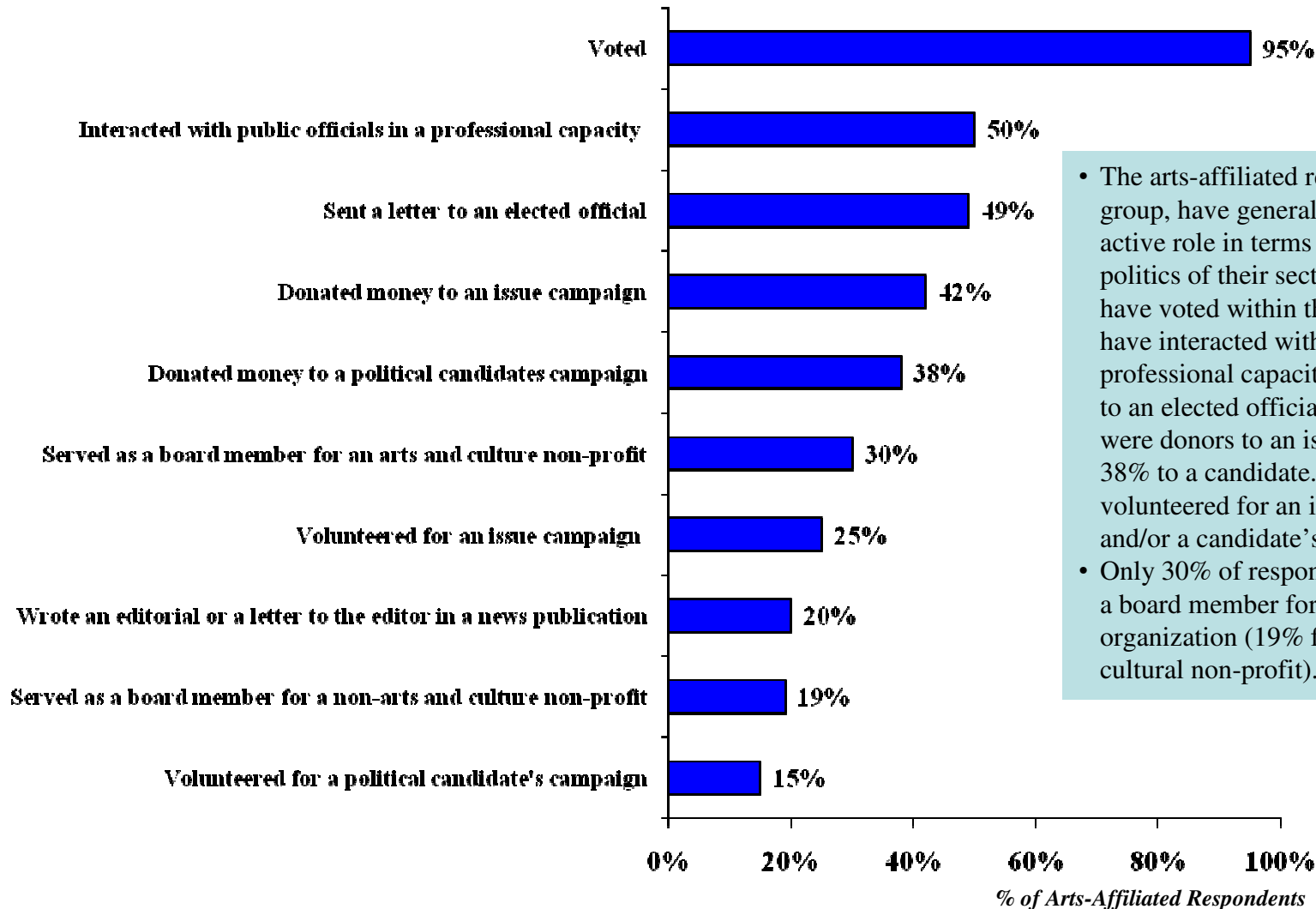
Partnerships between the arts and culture sector and other sectors are an important avenue to the achievement of goals. Here we show which sectors respondents believe are the most important non-arts sectors for the arts and cultural community to engage with.

Section V: Participation in Advancing Interest in Agenda

Participation in Advancing Interest in Agenda

Activities Participated in Past Year (Arts-Affiliated Respondents Only)

Q19b: Please indicate, whether in the past year, you have participated in any of the following activities.

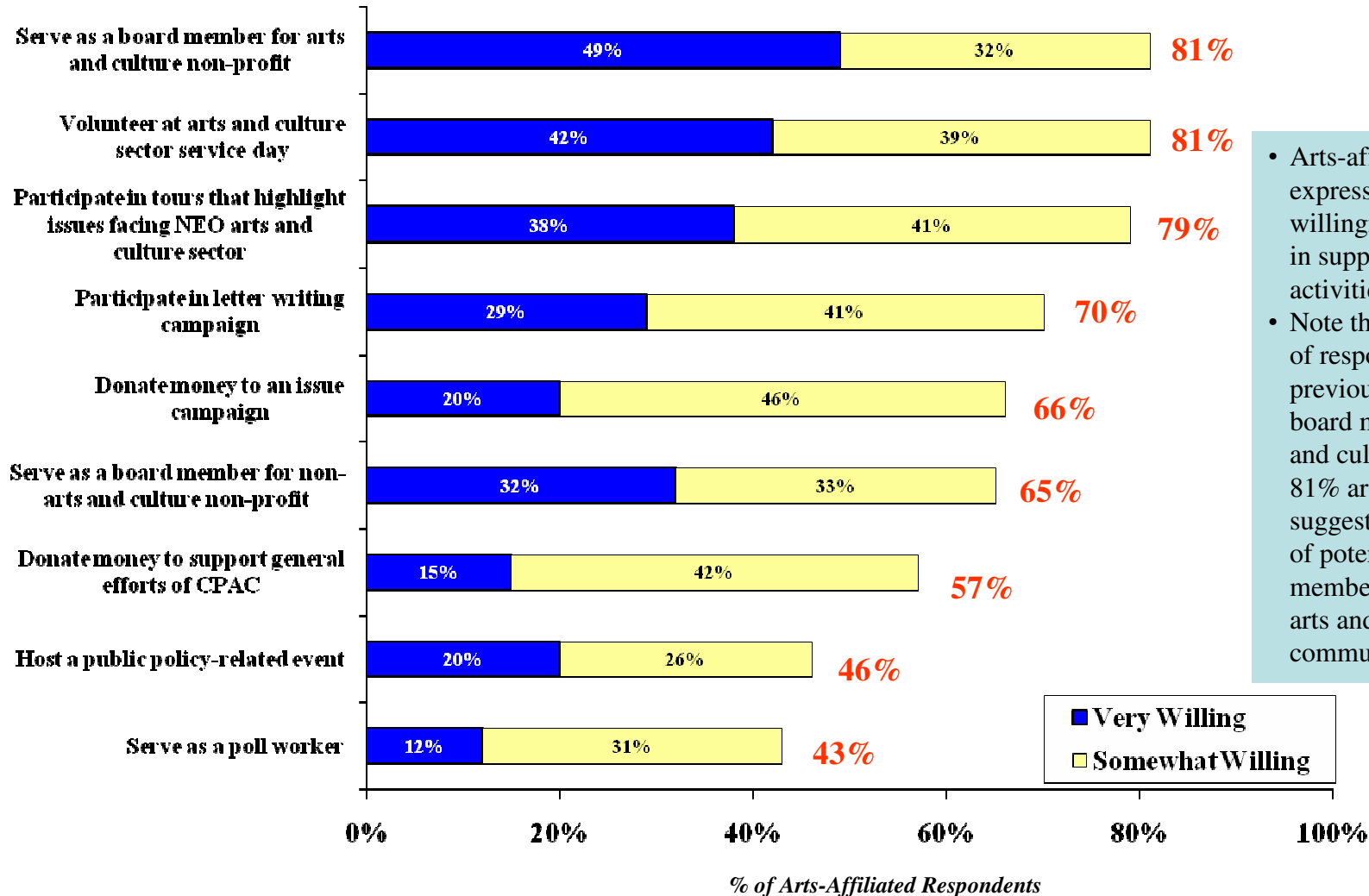


- The arts-affiliated respondents, as a group, have generally taken a fairly active role in terms of leadership and the politics of their sector. While almost all have voted within the past year, half have interacted with a public official in a professional capacity, and/or sent a letter to an elected official. Forty-two percent were donors to an issue campaign, and 38% to a candidate. Fewer (25%) volunteered for an issue campaign and/or a candidate's campaign (15%).
- Only 30% of respondents have served as a board member for an arts and cultural organization (19% for a non-arts and cultural non-profit).

Participation in Advancing Interest in Agenda

Favored Activist Activities

Q20a series: Willingness to...in order to support and advance NEO arts and culture sector?



- Arts-affiliated respondents expressed great willingness to participate in supportive programs and activities for the sector.
- Note that while only 30% of respondents (see previous page) have been a board member for an arts and culture non-profit, 81% are willing to do so, suggesting a ready-group of potential board members right within the arts and culture community.

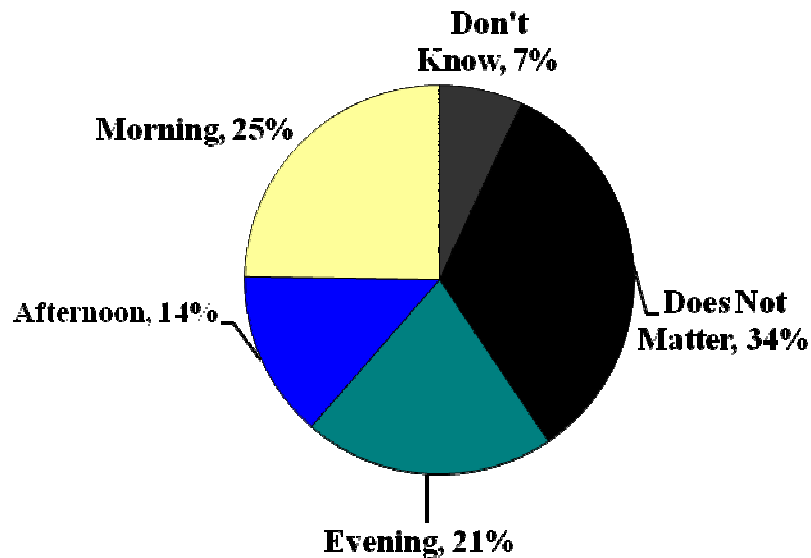
Section VI: CPAC Programming

CPAC Programming

CPAC Programming Participation

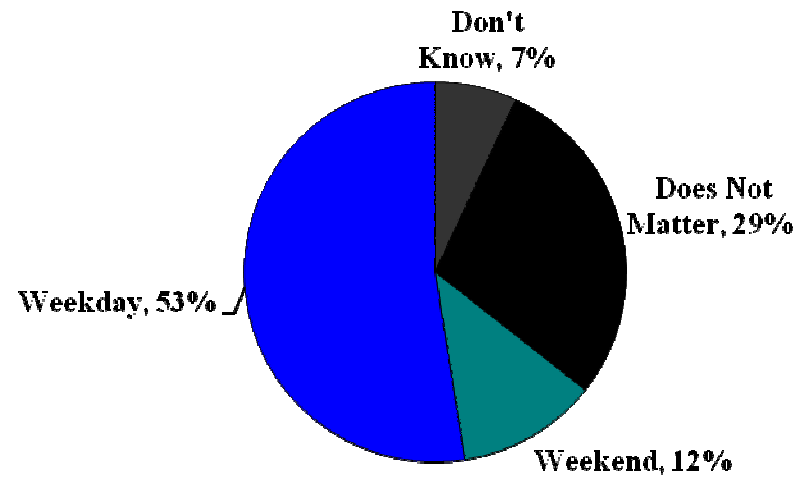
Q22a: CPAC offers programming for the arts and culture professional community. Would you be more inclined to participate in CPAC programming in the morning, afternoon, or evening or does it not matter?

n = 306



Q22b: Would you be more inclined to participate in CPAC programming on weekdays or weekends or does it matter?

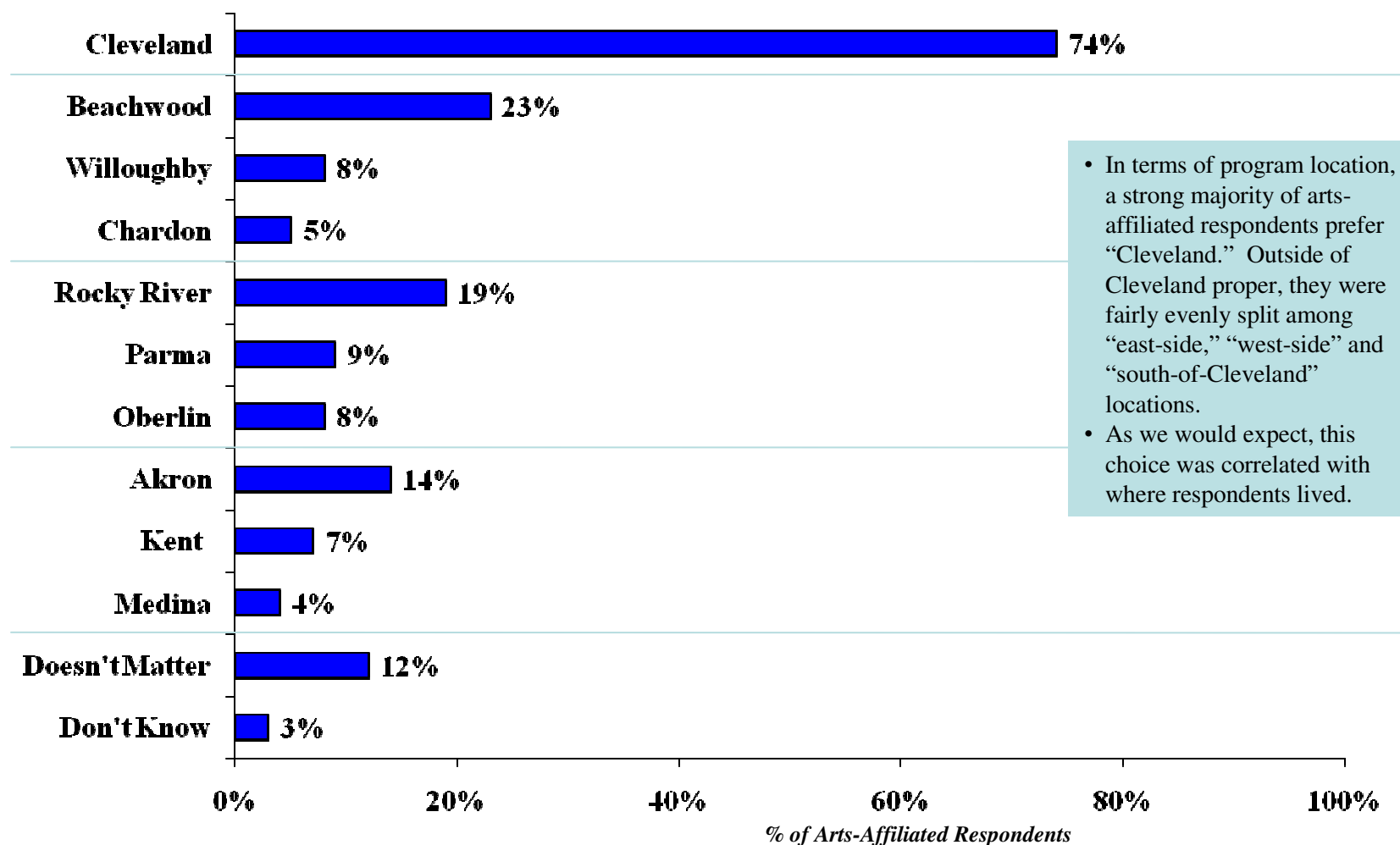
n = 309



CPAC Programming

Preferred Programming Locations

Q24b: In which of the following locations would you be most inclined to participate in programming to assist those working in arts and culture?



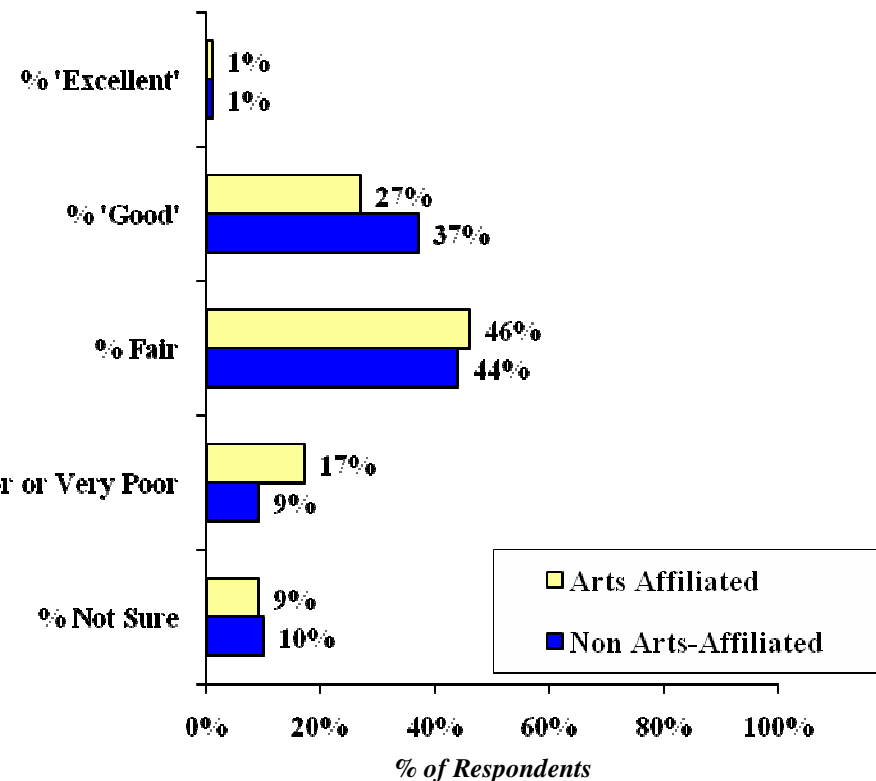
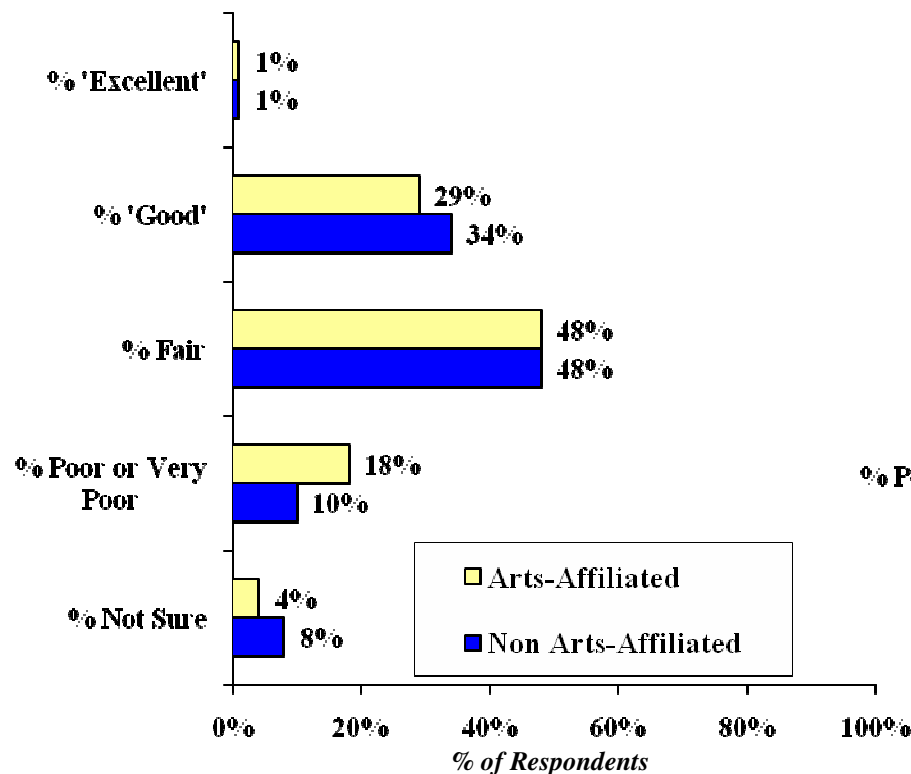
Section VII: State of Northeast Ohio

State of Northeast Ohio

Vitality & Financial Stability of Arts Organizations n = 313, Arts Affiliated; n = 191, Non-Arts Affiliated

Q10a; Q26a: In general, how would you rate the vitality and financial stability of Northeast Ohio's arts organizations today?

Q10b; Q26b: In general, how would you rate the vitality and financial stability of Northeast Ohio's arts organizations one year from now?

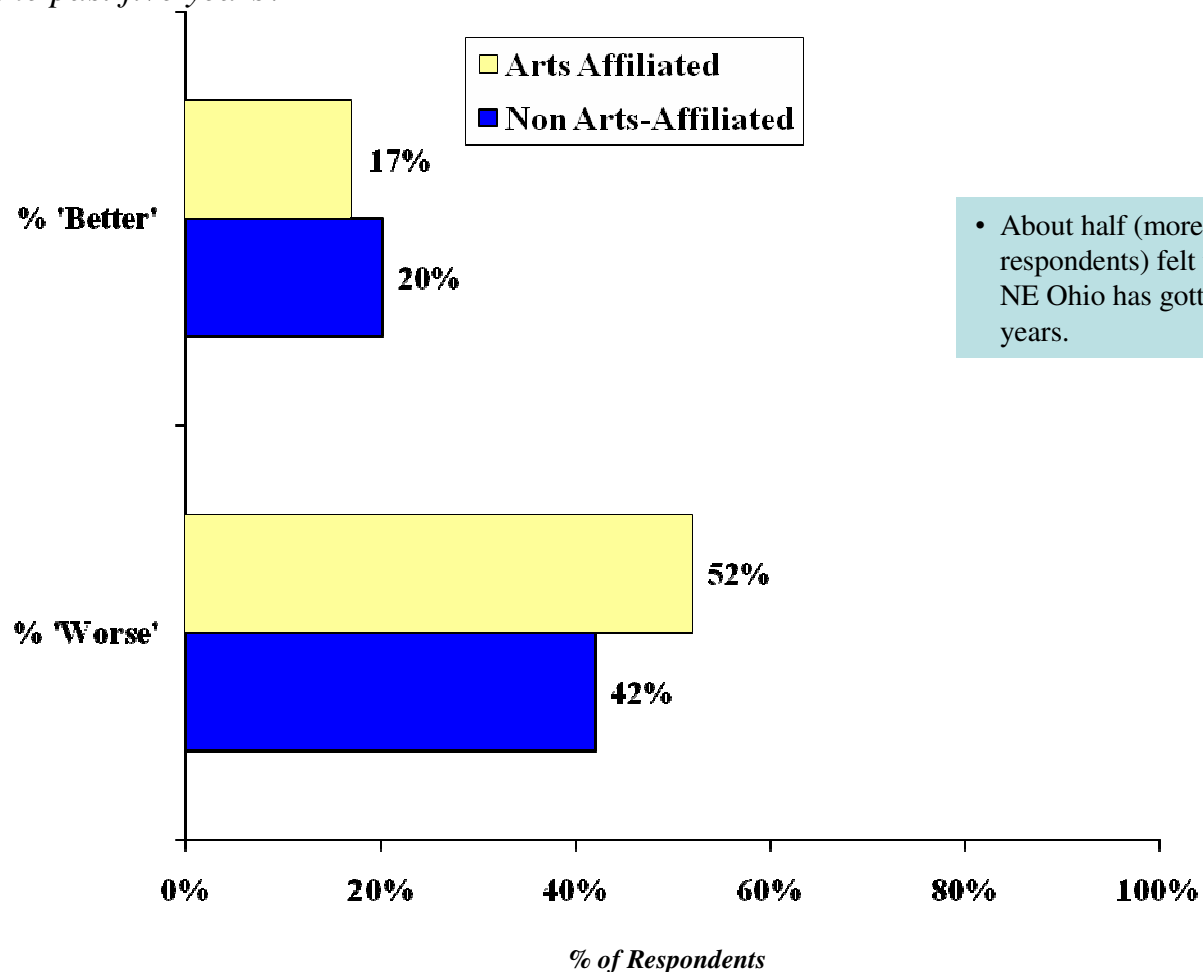


- About two-thirds of respondents described the “vitality and financial stability” of NEO’s arts organizations as no better than “fair.” (figure on left). Few see that improving within the next year (figure on right).

State of Northeast Ohio

Quality of Life in Northeast Ohio *n* = 308, Arts Affiliated; *n* = 192, Non-Arts Affiliated

Q11; Q27a: In general, do you think the quality of life in Northeast Ohio has gotten better, worse or stayed the same during the past five years?

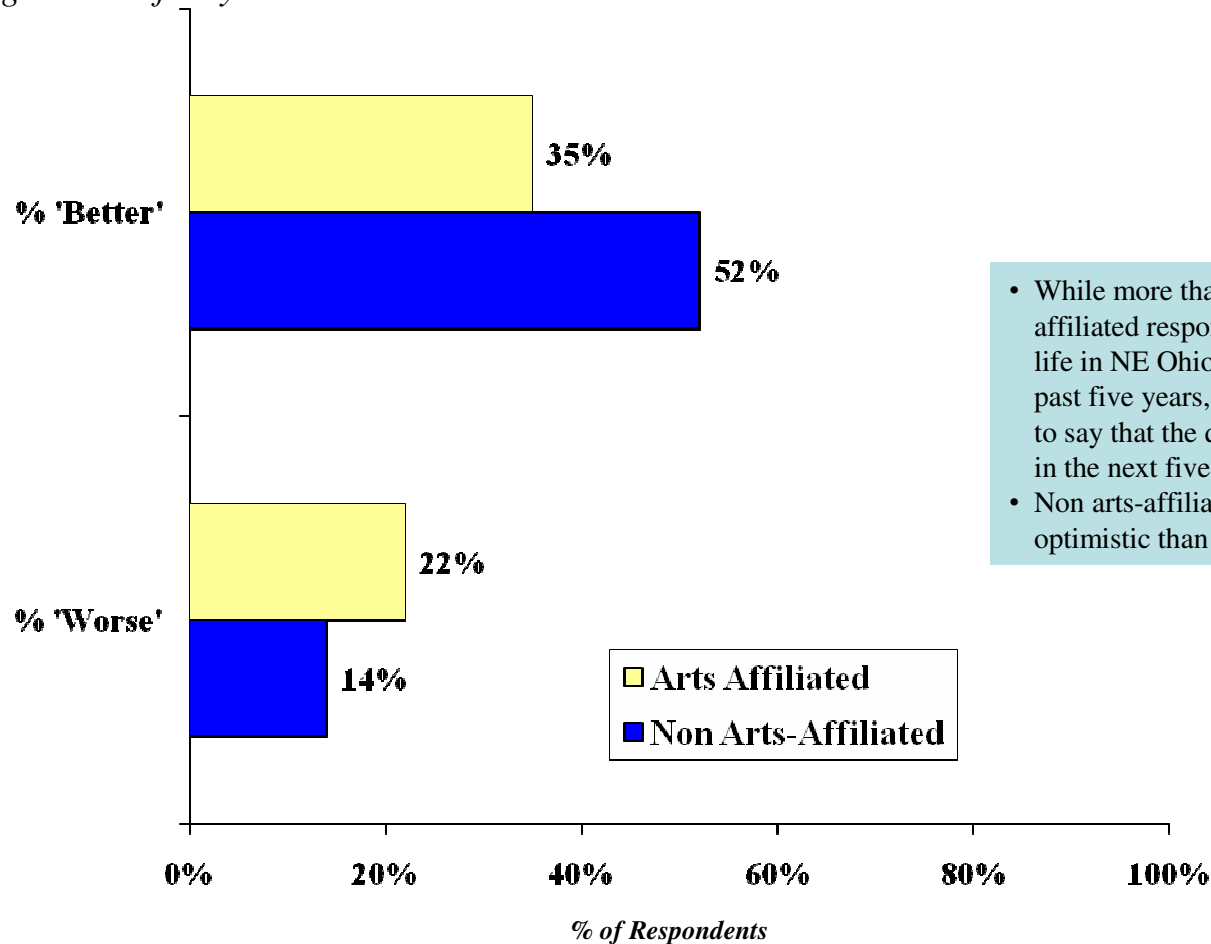


- About half (more so for arts-affiliated respondents) felt that the quality of life in NE Ohio has gotten “worse” in the past five years.

State of Northeast Ohio

Quality of Life in Northeast Ohio in 5 Years *n* = 308, Arts Affiliated; *n* = 191, Non-Arts Affiliated

Q11b, Q27b: In general, do you think the quality of life in Northeast Ohio will get better, worse or stay the same during the next five years?



- While more than half (more so for arts-affiliated respondents) felt that the quality of life in NE Ohio has gotten “worse” in the past five years, respondents were more likely to say that the quality of life will get “better” in the next five years than “worse.”
- Non arts-affiliated respondents were more optimistic than arts-affiliated respondents.