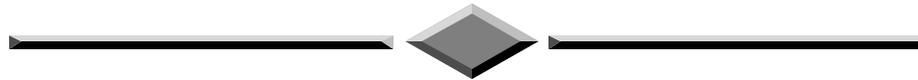


A Survey of Arts and Culture Consumers in the Greater Akron Area Arts and Culture Participation - Benefits and Barriers



December, 2002 Data Collection
March, 2003 Analysis Completed

Conducted by



Cypress Research Group

For

Community Partnership for Arts and Culture

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and



The GAR 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.



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Summary, Conclusions & Recommendations

A telephone survey of 300 adults was conducted from December 14, 2002 to December 23, 2002. Data from a very similar study of the same Akron-centric population base (250 completed interviews) were combined with these recent data to form the total sample of 550 discussed herein. 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 the Greater Akron area, 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 the Greater Akron area. The Greater Akron area was defined as the six counties containing or surrounding Akron (Summit, Medina, Portage, Stark, Wayne counties and the southernmost communities in Cuyahoga county)

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 Greater Akron population. That is, we found that 71% of those contacted were eligible to participate in our study. Therefore, we can estimate that 29% of the Greater Akron adult population does not participate in any arts and cultural activity in any given year. This compares negatively to the population area surrounding Cleveland (Cuyahoga, Lake, Lorain and northern Summit counties), of which 89% of the population was found to have participated in arts and cultural activities within the past 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 - 23% 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.



Summary, Conclusions & Recommendations

2. **Marketing Messages:** There were several strong themes of benefits obtained by Greater Akron residents 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 Greater Akron arts and cultural consumer group:
- *Entertainment/Fun* (91% top-two-box score)
 - *Sharing activities with family* (78%)
 - *Exposure to new things* (62%)
 - *Escape from normal routine* (61%)
 - *Education for children/grandchildren* (58%)
 - *Self-improvement/Education* (52%)
- We saw two distinctions here between the data collected in 2001 (which was Cleveland-centric) and the present study (which was Akron-centric). Greater Clevelanders stressed the benefits of *self-improvement/self-education* and *education for children/grandchildren* more than those in Greater Akron; Instead, Greater Akron residents stressed the importance of *escape* more than Greater Clevelanders.
3. Benefits expressed by a minority of Greater Akron residents, which would be messages with less appeal, included:
- *Learning about other cultures* (46%); *Social interaction* (40%); *Being close to talented people* (39%); *Knowing an event is good because everyone is talking about it* (34%); *Linkage to own heritage* (20%); *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 Greater Akron 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 Greater Akron 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, in order of importance:
- *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, participants in previous qualitative research taught us that 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, nearby activities). 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 more 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 higher pricing during events should develop partnerships with parking sites and offer discount passes. Institutions which are not effected by expensive parking should emphasize this benefit in their marketing. In total, this is a strong relative strength for Akron-based activities which should be leveraged.

- *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

Past local research has shown that in order to keep abreast of upcoming local arts and cultural events, one has to ‘know where to look’ and be willing to ‘read 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 community also needs to drive its customers to a cohesive, easy-to-use, single source of local arts and cultural programming.



Summary, Conclusions & Recommendations

- *Traffic after events* - Past research suggests that Akron-based activities are not guilty of inducing large traffic jams - the one exception being Blossom. However, this study shows that Greater Akron residents are *particularly* repelled by the prospect of large traffic problems after events

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. Akron-based activities like this should stress this as a strength in marketing materials - that is, use the fact that Akron-based activities do not suffer from post-event traffic jams as Cleveland-based activities do.

7. Residents of Greater Akron obtain information about upcoming arts and cultural events through a large variety of means. The most common is through the *Akron Beacon Journal* (82%), but 'local community newspapers' (*Sun Press*, etc.) is also an extremely common source of information (74%). However, a total of 25 different print sources (besides the *Akron Beacon Journal*) were listed by respondents as a source of arts and cultural information.
8. Eight-two 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. Past research has shown that people are 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 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.
 - In this recent study (which was Akron-centric), 79% of respondents reported attending field trips to arts and cultural institutions in grade school. This was lower than was found in the previous study of 2001 (89%), which was more Cleveland-centric. This finding is likely associated with the finding that, as a whole, the Greater Akron area has a lower proportion of adults that attend arts and cultural events (71%) than the Greater Cleveland area (89%).



Summary, Conclusions & Recommendations

Conclusion & Recommendation

The arts and cultural community should use this information in two ways. First, arts and cultural marketing should leverage this sentiment stressing ‘nostalgia’ and the ‘family connection’ component to participation in arts and cultural activities. Parents and grandparents can be assured that bringing arts and cultural experiences to their children/grandchildren will have life-long positive benefits. Second, this finding also has implications for the long-term health of the arts and cultural community in Greater Akron - building new audiences and loyalty to art venues and forms starts at a very young age. Continue developing and emphasizing school and youth programs.

9. The last major finding poses a large challenge to Akron-based arts and cultural institutions: A majority of respondents (60%) reported a preference for Cleveland for their arts and cultural activities to Akron. Only those in Stark and Wayne county showed a majority of people who preferred Akron (58%) to Cleveland.
 - Because this was a quantitative and not qualitative study, we lack in-depth information for the reasons behind this preference. We do know, however, that it is only a preference for Cleveland, as opposed to an active aversion to Akron, since almost all reported ‘simply preferring Cleveland,’ as opposed to wanting to ‘avoid Akron.’

Conclusion & Recommendation

*Akron-based arts and cultural activities can overcome this preference for Cleveland-based activities by stressing the fundamentals outlined in this report: Provide the highest possible quality of artistic experience, but at the same time ensure that the **entire** experience is a positive one. Remember, your customers are judging you on the entire aspect of their visit with you - from the time they leave their door to the time they return. Make every step of the way as convenient, hassle-free and special as possible. Also stress the real strengths that Akron-based events have - easy access, low traffic, and convenient and fairly-priced parking.*



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 nationwide.

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. In the Fall of 2001, a survey of 800 residents of Northeast Ohio was conducted 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. The current study is identical in its overall objective, but focuses only on those in the Greater Akron area.**

The specific objectives of these studies are to determine:

- Are area residents 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 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?
- What messages should arts and cultural institutions stress in their marketing?
- What perceived weaknesses of arts and cultural activities in our area should be alleviated?
- Which geographic locations do residents of Greater Akron favor for their arts and cultural activities?
- 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

Telephone Interviews

- All data were collected via telephone from a centralized telephone data collection center.
- The results presented in this report reflect telephone interviews with a total of 550 adult residents of the Greater Akron community. These 550 interviews comprise a data set which is a combination of results from two separate but extremely similar telephone surveys. The first, conducted in October and November of 2001, was of 800 adult residents of Northeast Ohio. In that study, 250 of the interviews were with those that live in the Greater Akron area. The second study was a telephone interview of 300 adults in the Greater Akron area only, and those data were collected from December 14, 2002 to December 23, 2002. The questionnaire for the second study was extremely similar to that used in the first, and most of the results reported herein are of the total 550 participants in the study. A small minority of survey items were presented to only participants in the second study; those questions with the smaller sample size of 300 are noted throughout the report.
- The interviews lasted, on average, 15 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 (the majority of the survey) contained ‘core’ questions, which were asked of all 550 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.
- Survey participants were only those that had participated in at least one arts and cultural activity or event within the past year, which was validated at the onset of the telephone interview.
- To boost participation, 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.

Methods

Data Collection (continued)

Sampling

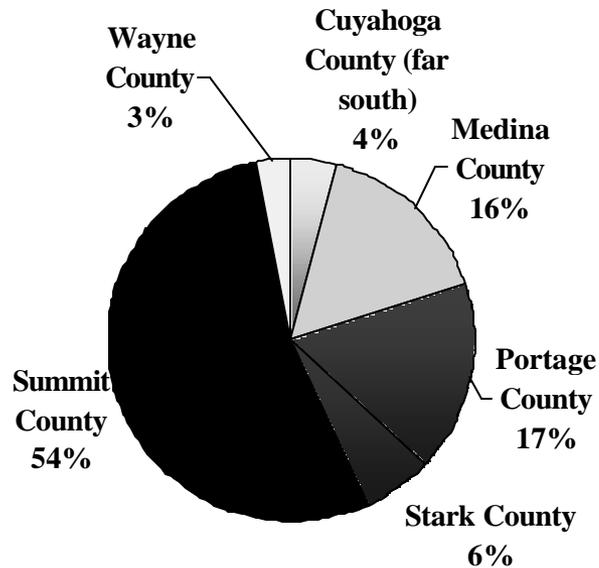
A random sample of potential respondents was drawn from both listed and random digit dialing sample, which was stratified based on zip codes of targeted Greater Akron municipalities. The final data were weighted according to 2000 U.S. Decennial Census population data for all municipalities to properly reflect the Greater Akron population base. The unweighted stratification scheme, as well as the weighted results of the same sample, are presented on the following page.

Sampling & Data Precision

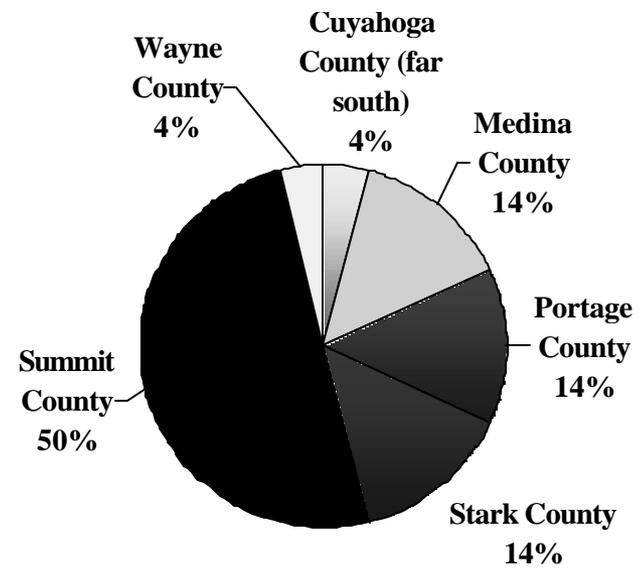
- A sample size of 550 allows us a margin of error of +/- 4.2%. That means that the proportional results that we've obtained in this sampling are within +/- 4.2% what we would have found had we interviewed the entire universe of adult Greater Akron residents that recently participated in arts and cultural activities. For those questions in the survey for which only half (approximately 275) respondents were queried, the margin of error is +/- 5.9%.

Methods

Geographic Strata of Telephone Sample
Unweighted Data
n=550



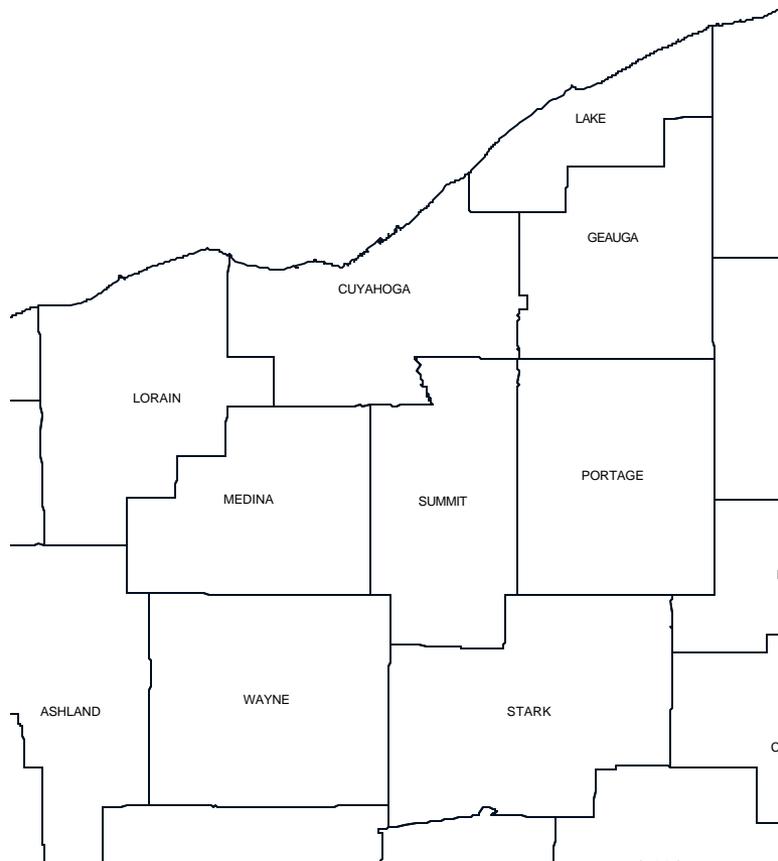
Geographic Strata of Telephone Sample
Weighted Data
n=550



- These sampled communities represent 1.2 million adults in the Greater Akron area.
- Herein, all results of the study presented are based on weighted data, unless otherwise noted.

Methods

Sampling - Geographic Areas Covered In Cleveland-Centric study (October, 2001) and Akron-Centric study (December, 2002)



Akron-Centric Study (December, 2002)

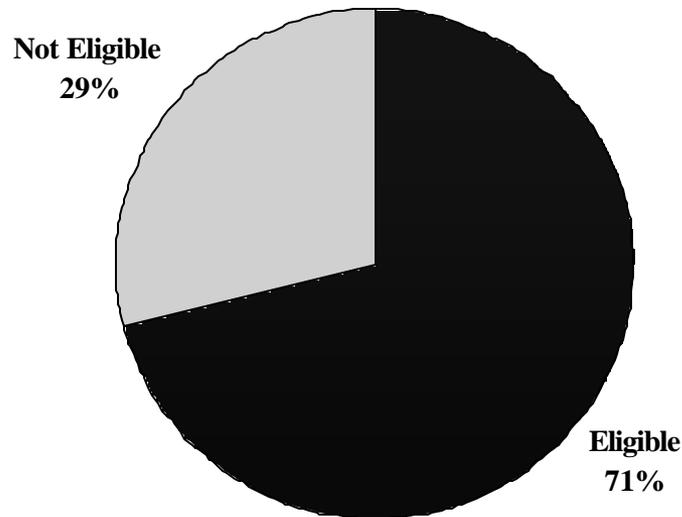
- Southern Cuyahoga County
- Summit County
- Portage County
- Wayne County
- Stark County
- Medina County

Cleveland-Centric Study (October, 2001)

- Cuyahoga County
- Eastern Lorain County
- Eastern Medina County
- Western Lake County
- Northern Summit County (including Akron)
- Western Geauga County

Methods

Sampling - Percentage of Contacted Potential Respondents Not Eligible for Survey



- This figure estimates the proportion of Greater Akron adult residents 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 are arts and culture consumers.
- We do not have a large amount of comparison data on this result. That is, we cannot say with great confidence if the Greater Akron area has a larger-than-average or smaller-than-average arts and cultural consumer base. We can say, however, that the proportion of those that have attended at least one arts or cultural activity or event within the past year is lower among Greater Akron residents (71%) than among NE Ohioans (who are majority Greater Cleveland residents) in general (89%).

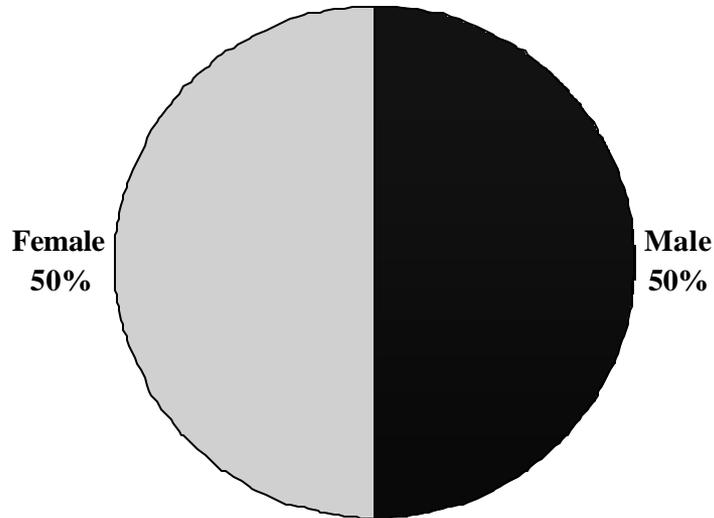
Respondent Profile

- 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 Greater Akron 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 Greater Akron and those that don't.

Demographic Characteristics

Respondent Gender

Weighted Data (n=550)

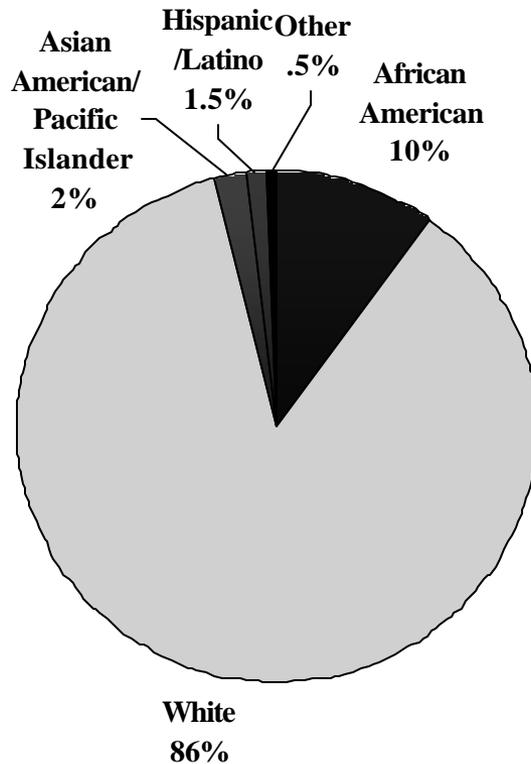


- Overall, 50% of the respondents were male (weighted data and unweighted). This was by design, in that during the interviewing process half of the interviews were intentionally conducted with males.

Demographics

*Respondent Cultural/Ethnic Background**

Weighted Data (n=550)



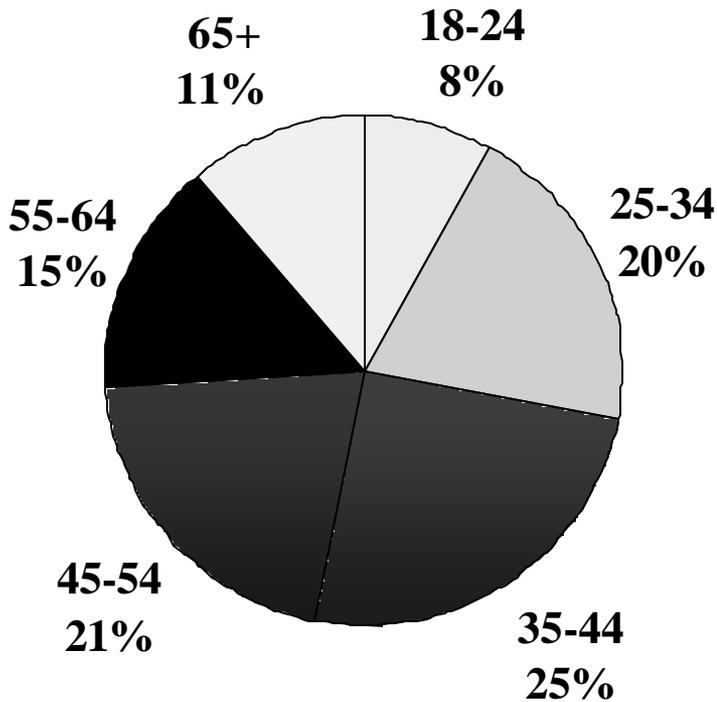
- The majority of respondents were White (86%). The second most common ethnic/racial group was African American, to which 10% of the respondents belonged. Another 2% of the respondents were of Asian/Pacific Islander descent, and about as many (1.5%) were of Hispanic/Latino descent. The final .5% of our respondents 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).

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

Demographics

*Respondent Age**

Weighted Data (n=550)



- This figure shows this sampled group of arts and culture patrons in the Greater Akron area includes people from all age groups. However, most commonly this group includes those in the middle age groups (35-44, 25%; and, 45-54, 21%).
- 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 (11%) (although the population figures for seniors in our region are 14%). 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.).

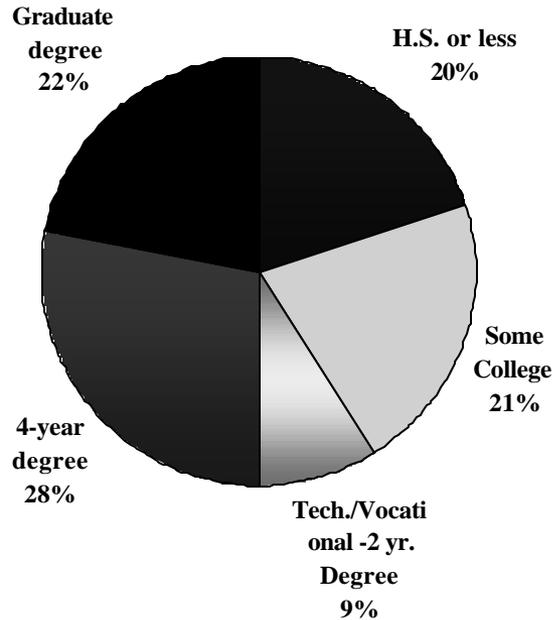
*Don't Know/Refused responses removed from base.

Demographics

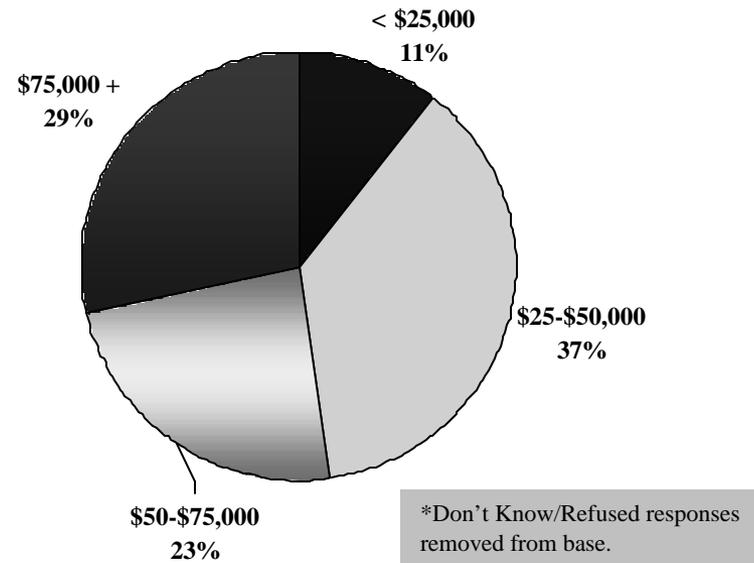
*Respondent Education/Household Income**

Weighted Data (n=550)

Education Levels



Household Income



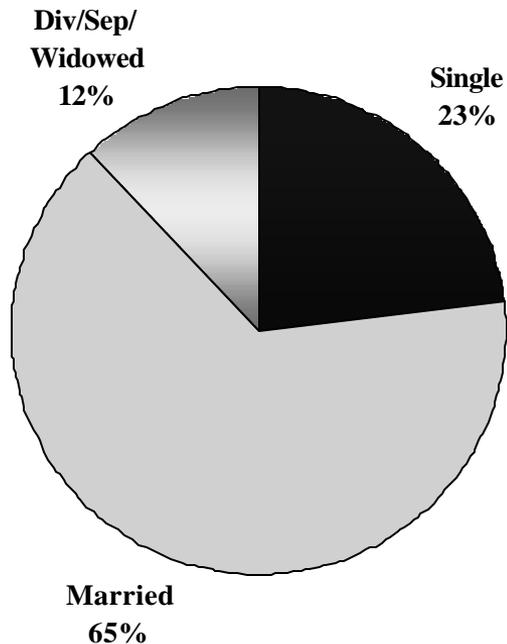
- Respondents, as a group, represented a wide variety of education levels and household income levels.
 - While one-in-five (22%) had graduate-level degrees, almost as many had discontinued their education at the high school level (20%), or had obtained only some college (21%). Nine percent had secondary technical/vocational training or obtained a 2-year degree. Most commonly (28%), respondents had a four-year college degree.
 - Likewise, while 29% of the respondents were relatively affluent with household incomes over \$75,000, a good portion of the respondents (11%) 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 23% had incomes between \$50,000 and \$75,000.

Demographics

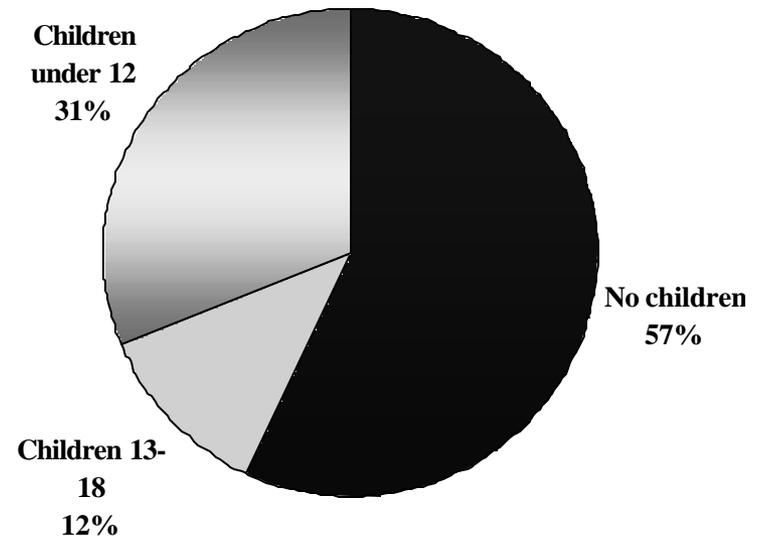
*Household Composition - Marital Status & Children in Household**

Weighted Data (n=550)

Marital Status



Children in Household



- Two-thirds of the respondents were married (65%). Almost one-fourth (23%) were single (never married), while 12% were divorced, separated, or widowed.
- The majority of respondents live in households where there are no children present (57%). However, a good portion of these arts/culture participating respondents have children in the household, most commonly young children (under age 12) (31%).

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

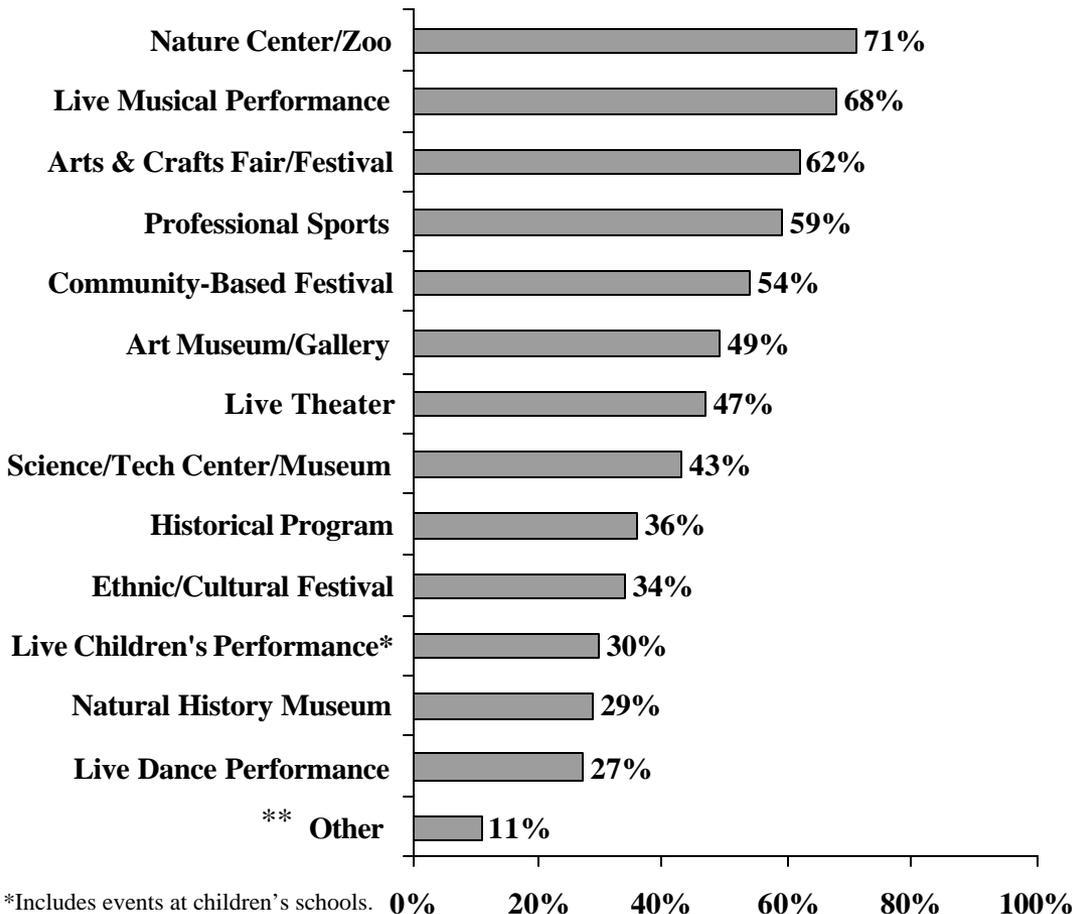
Level and Type of Participation in Arts and Cultural Activities

Level and Type of Participation in Arts and Cultural Activities

Type of Activities

Weighted Data (n=550)

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.
- **The most popular arts and cultural activity, in terms of percentage of people attending at least once, is visiting a ‘nature center or zoo’ (71%). This was followed closely by attendance at a ‘live musical performance’ (68%).**
- The next level of popular activities include visiting ‘arts & crafts fair/festival.’ (62%) or ‘community-based festival’ (e.g. FirstNight or City Fair) (54%).
- While we did not include ‘professional sports’ in our categorizations of arts and cultural activities in our interviews, we did capture frequency of attending them for comparison purposes. Here we see that attending professional sporting events was one of the most popular activities (59% of respondents had done so at least once in the past year).

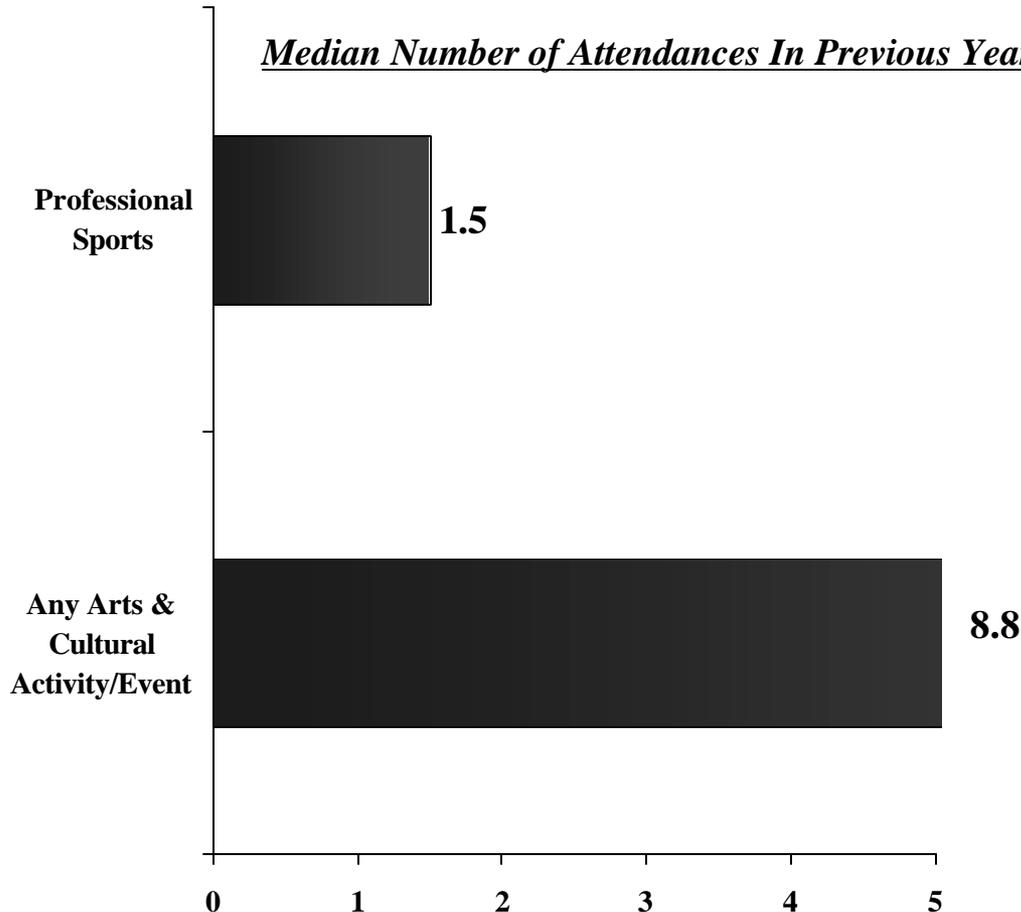
*Includes events at children’s schools. 0% 20% 40% 60% 80% 100%
 **Comprehensive listing of ‘other’ responses can be found in Appendix.

Level and Type of Participation in Arts and Cultural Activities

Type of Activities

Weighted Data (n=550)

Median Number of Attendances In Previous Year



- On average, adults in the Greater Akron area attend more arts and cultural activities/events in a year than professional sporting events (mean of 8.8 vs. 1.5). Of course there are many more opportunities for arts and cultural participation, as there are a great deal more variety and occasions of arts and cultural experiences than professional sports events.

- Frequency of attendance at arts and cultural activities and sporting events is strongly related to education levels: Level of attendance at both is almost twice as great among those with college degrees vs. those with only a high school education.

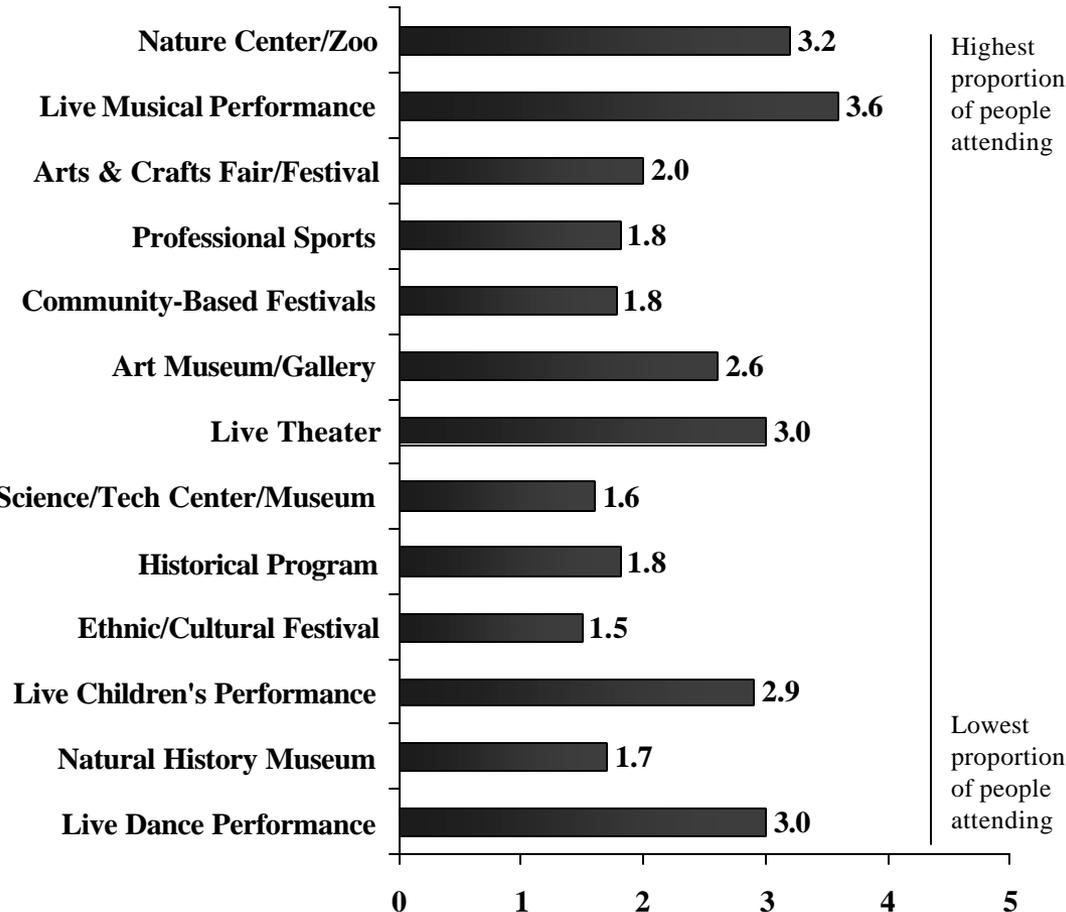
- In that same light, we should stress that many fans of arts and cultural activities are also fans of professional sporting events. That is, if we accept the notion that sports fans are different people than arts and cultural fans, we would be wrong: attendance at arts and cultural events among professional sporting fans is not lower than among non-fans of 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 apparently share much of the same customer base.

Level and Type of Participation in Arts and Cultural Activities

Type of Activities

Weighted Data (n=550)

Mean Number of Attendances In Previous Year

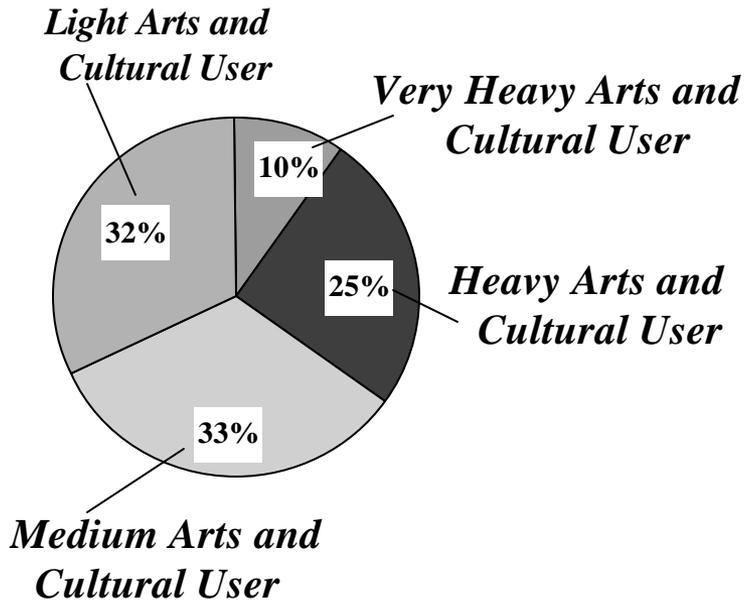


- Another way to look at these data is to see how frequently people participate in each different type of activity in a given year. These are ranked, from top to bottom, by the highest to lowest proportion of people that attend at least one of these per year.
- We see here that 'live musical performances' are the most frequently attended activity among the fans of that genre (average of 3.6). This is followed closely by annual attendance at a nature center or zoo (mean of 3.2). Fans of 'live theater' attend a performance, on average, 3 times per year, as do fans of 'live dance performances.' Attendance at 'live children's performances' is also a fairly frequent event: 2.9 times per year, on average.

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=550)



- 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). We know from past research that, as a region, our best way to increase overall participation in arts and cultural activities is to focus on the needs of ‘medium level users.’ This is because ‘light users’ tend to have certain attitudes which preclude them from participating at a higher level. Medium level users, however, have very similar attitudes about arts and cultural activities to those that are ‘heavy users.’ They would like to attend more, it is just that medium level users have certain objections or barriers which prevent them from doing so. The bulk of this report is dedicated to examining exactly what those objections and or barriers are so that the Greater Akron arts and cultural community can remove the objections thereby increasing total participation rates.

- Here we see that about one-third of the respondents (32%) can be considered ‘light’ arts and cultural consumers - they reported attending less than 6 activities or events during the previous year. **Another 33% 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 (25%) go once or twice a month, and the ‘very heavy’ users go more than twice a month, on average (10%). We can conclude that there is a very large market - one-third of all arts and cultural consumers - who are inclined to participate in arts and cultural activities more - *if their needs are being met.* We devote much of the remainder of this report to examining what those needs are.

Level and Type of Participation in Arts and Cultural Activities

Who are the heaviest consumers of arts and cultural activities?

Weighted Data (n=550)

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

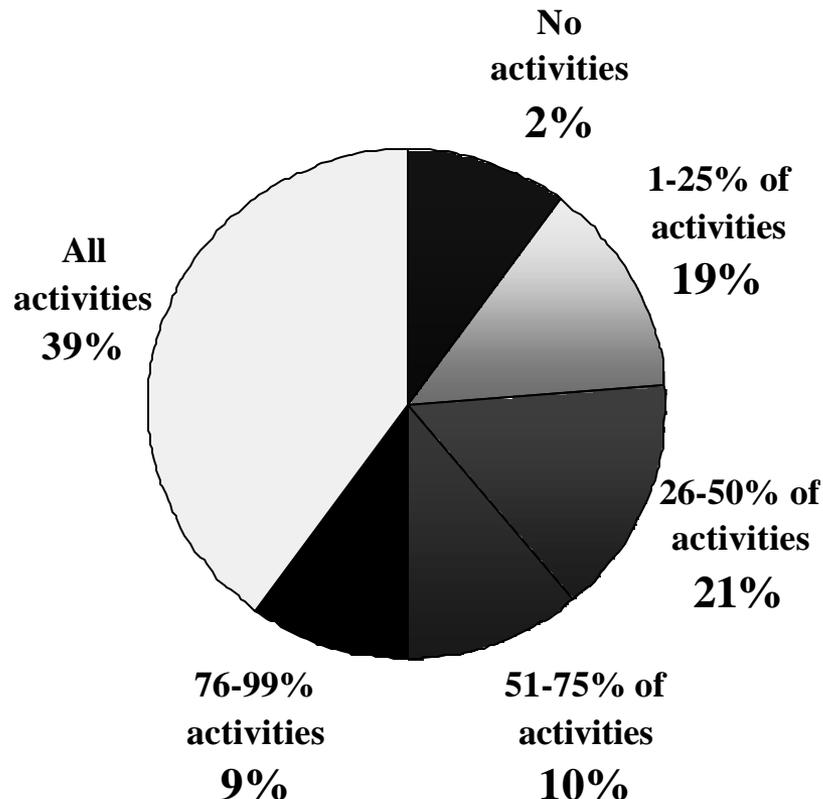
- ✓ Have a college degree (and those with graduate degrees tend to be even heavier consumers);
- ✓ Have household incomes over \$75,000 (although about one third of those with household incomes under \$50,000 are heavy consumers);
 - Income and education level are highly correlated in the general population, 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. Information on education levels should be useful in target marketing campaigns.

Level and Type of Participation in Arts and Cultural Activities

Family Specific Activities

Weighted Data (n=550)

% of Activities Attended 'as a Family'
All Respondents



- **The connection between arts and cultural activities and 'the family' cannot be understated.** The data clearly show that the 'family' plays a very significant role in the arts and cultural activities of those in the Greater Akron area: *a majority (58%) spend at least half of these activities with their families.* It is important to note, however, that the definition of 'the family' is not the classic definition of the nuclear family - mom, dad and two children. Rather, in other studies we've seen that people define families in numerous ways (in-laws, adult cousins, etc.). Arts and cultural institutions can benefit by tapping into that sentiment that arts and cultural activities are tied in people's minds to family activities. A perceived benefit can be gained by being 'family-friendly,' but remember that being 'family-friendly' is not the same thing as being 'children-friendly.' Instead, it is more akin to being friendly to small-groups, as it is very common for adults to share their arts and cultural experiences with adult family members (not just spouses).

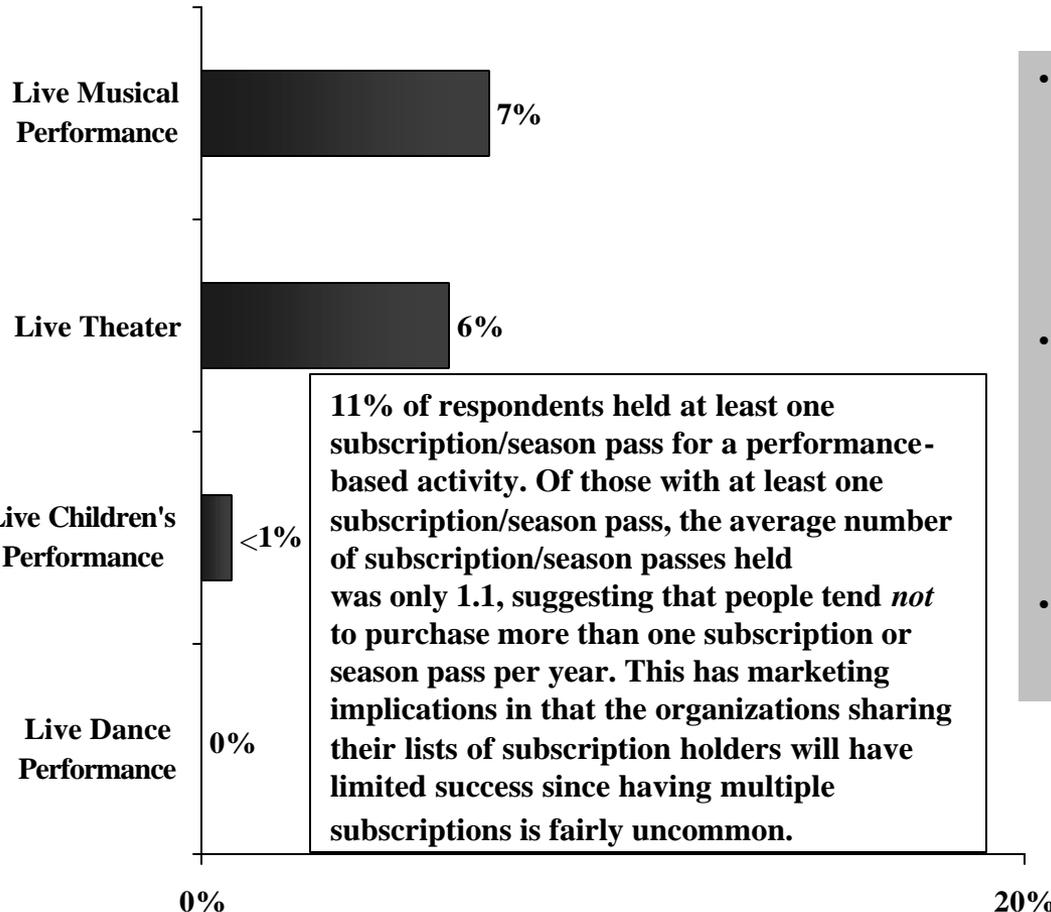
Subscriptions & Memberships

Subscriptions & Memberships

Subscription/Season Pass Holders

Weighted Data (n=281)

Percentage of Respondents



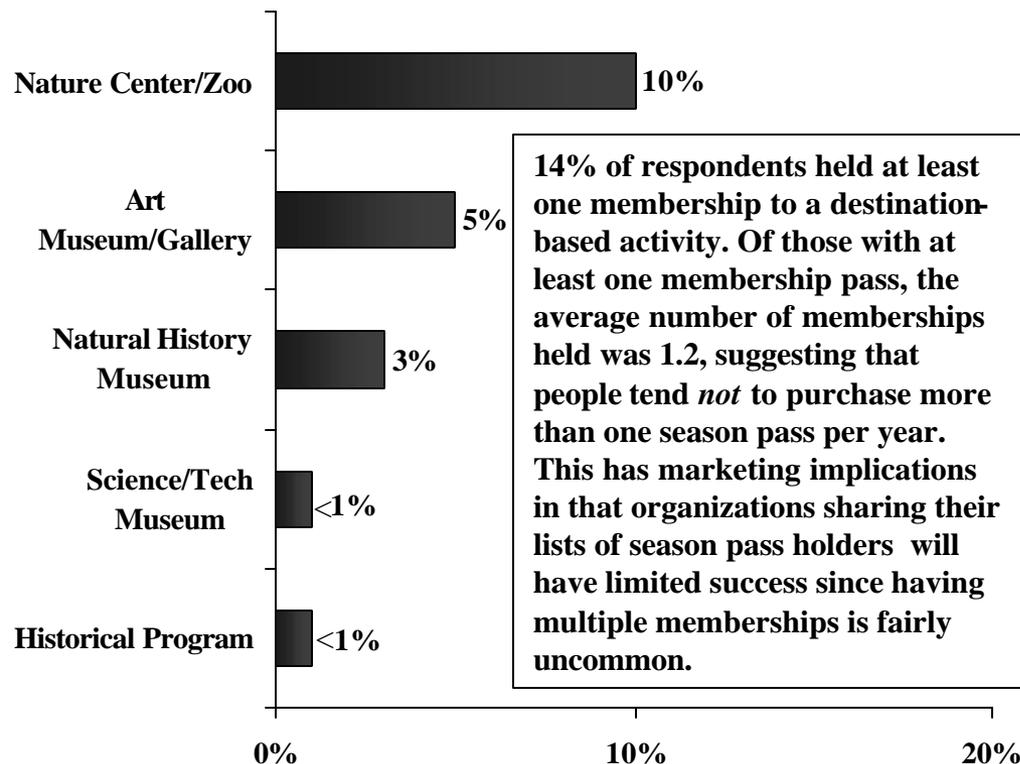
- This figure shows what percentage of our randomly chosen subsample (n=281) held subscriptions or season passes to each of these applicable arts and cultural activities. This is expressed as the percentage of all respondents asked about subscriptions and season pass holders (not just those that participated 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 performance,' with 7% of the respondents reporting at that level; this is followed closely by a 6% of the respondents with subscriptions to 'live theater.'
- Subscriptions to 'live children's performances' and 'live dance performances' were extremely uncommon, reported by less than 1% of the respondents.

Subscriptions & Memberships

Membership Holders

Weighted Data (n=281)

Percentage of Respondents



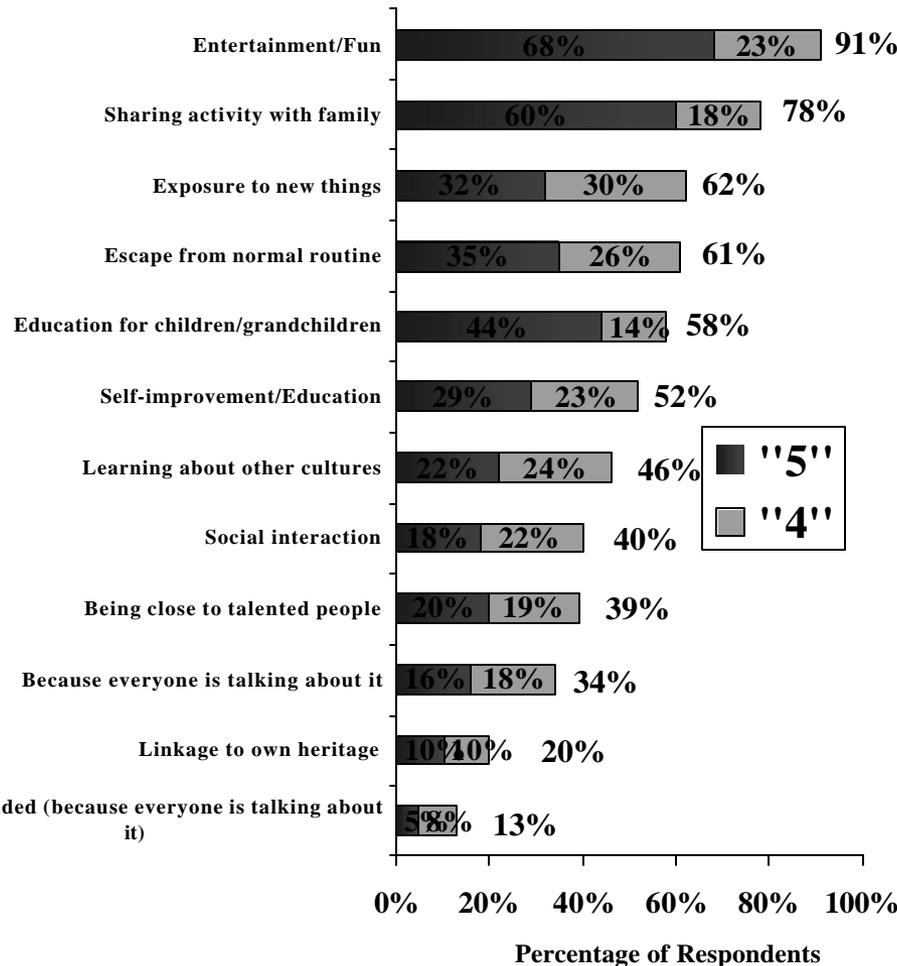
- This figure shows what percentage of our randomly selected subsample (n=281) held memberships to each destination-based activity. This is expressed as the percentage of all respondents asked about memberships (not just those that participated in these activities within the past year).
- Overall, a small proportion of the arts and cultural patrons held any memberships in the past year (14%), 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/zoos,’ with 10% of the respondents reporting at that level; this is followed closely by 5% of the respondents with subscriptions to ‘arts museums or galleries.’
- 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 than 1% of the respondents.

Benefits of Participation in Arts and Cultural Activities

Benefits of Participation in Arts and Cultural Activities

Benefits

Weighted Data (n=550)



- The most effective marketing messages are those that tap into some sort of emotion that the intended audience can relate to. One way we identify those emotions is to identify *why people like that thing which we are trying to promote. What benefit does that thing provide to people?* By focusing on those benefit in marketing messages, we can therefore begin to associate our product or service with those perceived benefits in people's minds. This makes them much more predisposed to make the purchases we want them to make.
- In the survey, respondents were asked to rate each of 12 benefit statements. 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): This was the highest rated benefit. 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 associated with each artistic activity.
- **Sharing activity with family** (78%): This surprising finding emphasizes the importance of arts and cultural activities that is associated with family time. This unique ability of arts and cultural activities to bring families together should not be overlooked in marketing messages.
- **Exposure to new things; Self-improvement & education** (62%;52%): In past research, arts and cultural customers 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 truly a unique quality that arts and cultural activities bring to consumers.
- **Escape from normal routine** (61%): Rounding out the top benefits is that arts and cultural activities provide an 'escape.' This has obvious marketing message implications in that the arts and cultural institutions should convey this message in marketing materials - appropriate visuals and language can send the message that this arts and cultural experience will 'bring the visitor into a different world.' The importance of escapism has larger implications also, in that the arts and cultural experience itself must promote escapism. The moment a customer walks through the door, their experience should look and feel completely different from their day-to-day lives. This needs to be true from beginning to end of their time with arts and cultural institutions - and institutions need to pay close attention to every detail of their customers' experience, especially anything which would jolt customers back to reality and away from their escape. Attending arts and cultural events or experiences is special to people, and arts and cultural institutions which maintain that special feeling for their customers throughout have maximum audiences and patrons.

Benefits of Participation in Arts and Cultural Activities

Moderately Common Benefits

- **Education for children/grandchildren (58%)** : This is a relatively important benefit for Greater Akron arts and cultural consumers, as a group. We have seen in past research that 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.
- **Learning about other cultures (46%)**: This is a somewhat important theme in that it was noted as an important benefit to almost half of the survey 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. Apparently learning about *other* cultures (instead of one's own cultural heritage) 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.
- **Social interaction (40%)** : This benefit was stressed by less than half of the respondents, however it was significantly more important to Non-White survey respondents (48% 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 is one of the less important benefits as only about one-third of the survey participants felt this was a driving force in attending arts and cultural activities.

Benefits of Participation in Arts and Cultural Activities

Less Common Benefits - Weakest Marketing Messages

- **Because everyone is talking about it (34%):** 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 locals to attend an event. 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 (20%):** On the previous page we discussed the benefit of ‘learning about other cultures,’ which was a relatively strong benefit for many (43%). For this group, however, linkages to one’s *own* heritage has less appeal than learning about *other* cultures.
 - This is different, however, for the Non-White participants that we surveyed. Forty-one percent reported that this was a strong benefit for them.
- **To be included (because everyone is talking about it) (13%):** Just as those in Greater Akron appear to not be swayed by what activities ‘everyone is talking about,’ they carry that sentiment one step further in that they do not feel compelled to attend an activity or event just ‘to be included.’ That is, locals 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. This is the least compelling reason to attend arts and cultural activities, as measured in our survey.

Benefits of Participation in Arts and Cultural Activities

Perceived Benefits By Level of Arts and Cultural Use

Weighted Data (n=550)

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
- 

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.

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

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

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.

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)
- 

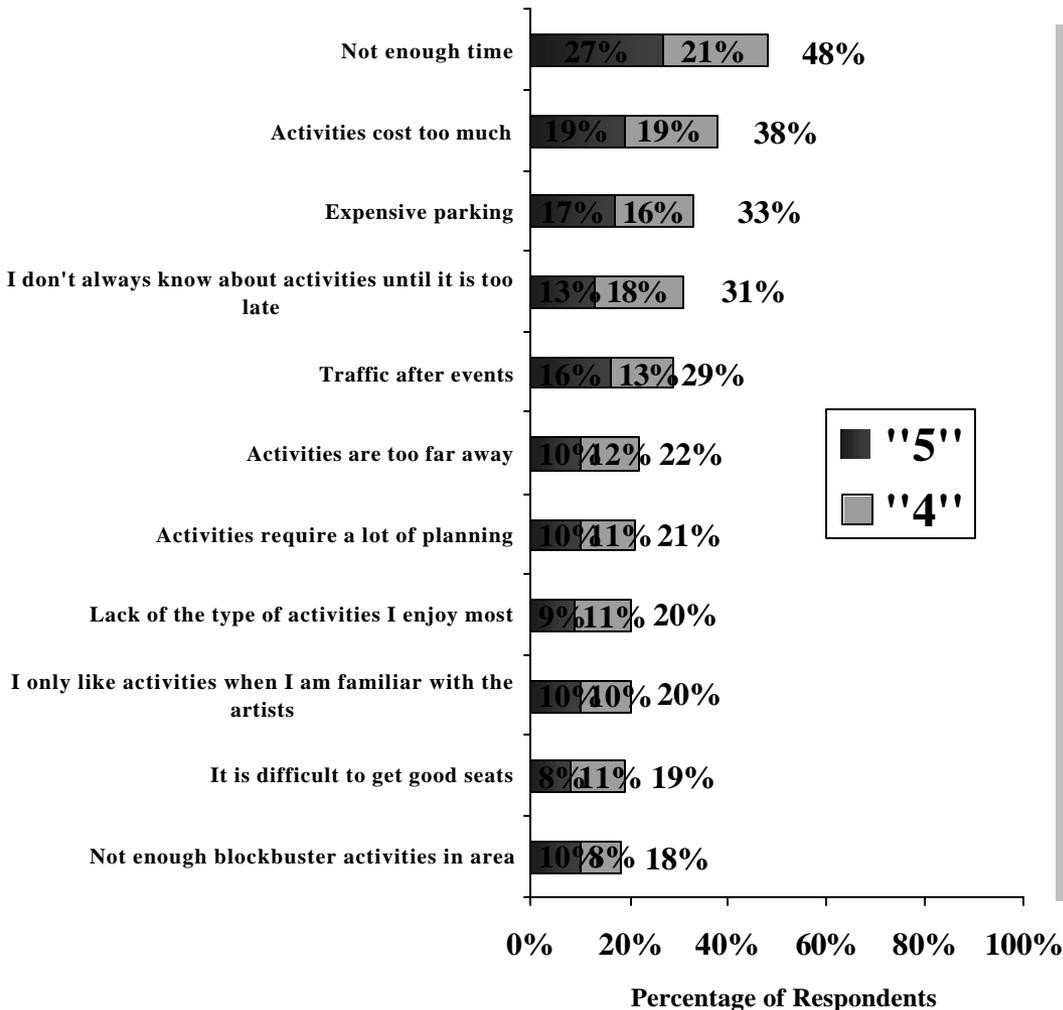
The assumption here is that very heavy users perceive these benefits at higher levels, which are the major attitudinal differences between heavy and very heavy arts and cultural users. These are messages expected to have less appeal or credibility with the heavy level users, as opposed to the very heavy 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=550)



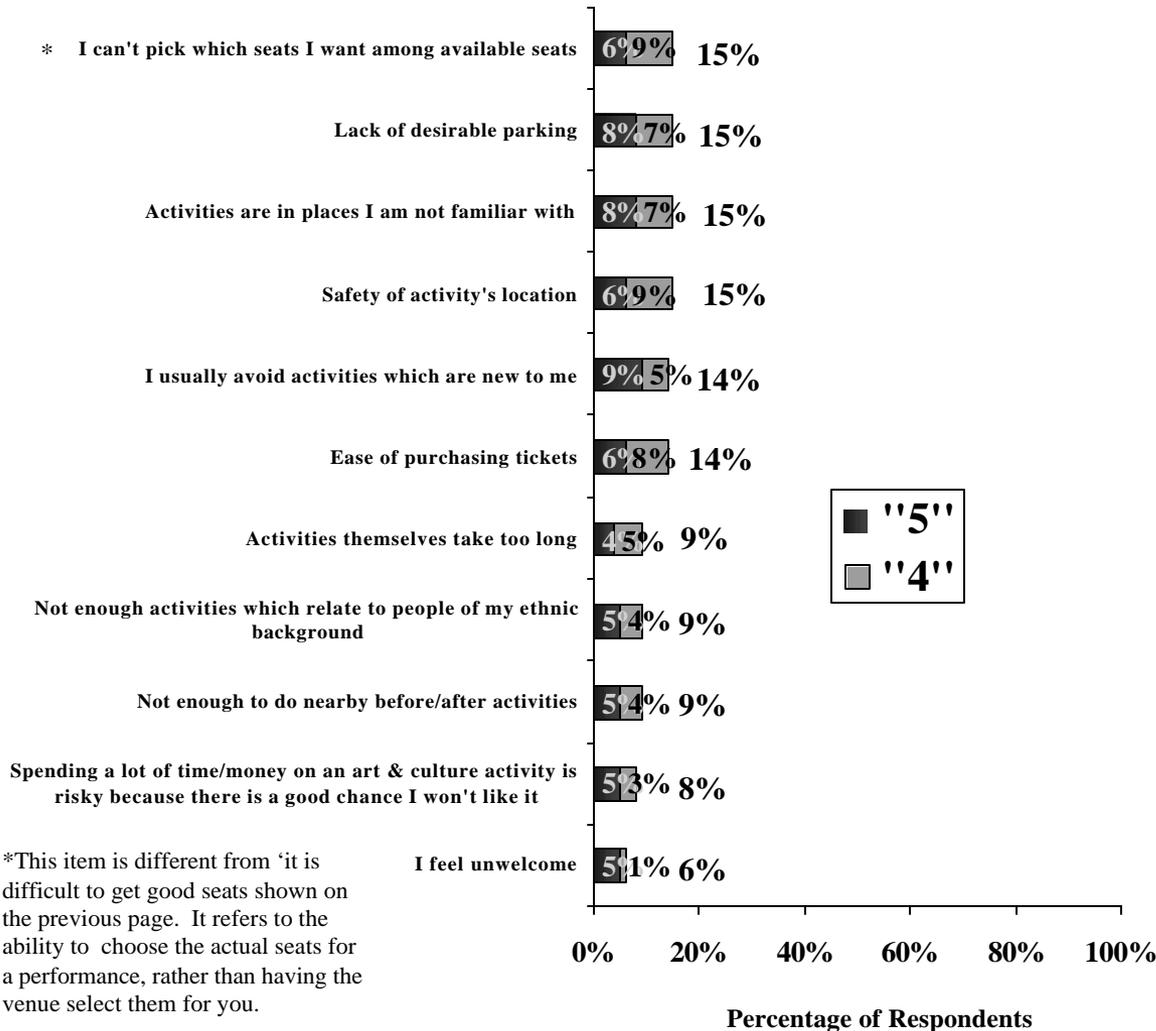
- In the previous section we focused on uncovering the conscious sentiments attached to attendance at arts and cultural activities, with the goal being to highlight those marketing messages which will be most appealing to those in the Greater Akron area. Now we turn our attention to the sentiments which need to be handled in a different way - those which need to be addressed by arts and cultural institutions reminding customers that they *don't* have this weakness or by making their institution stronger in this aspect. These 'barriers' are the things that prevent the 'medium level' arts and cultural customers from going more often. They are 'excuses' in their minds or negative perceptions which are just enough to overcome their desire to attend arts and cultural events.
- 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=550)



*This item is different from 'it is difficult to get good seats shown on the previous page. It refers to the ability to choose the actual seats for a performance, rather than having the venue select them for you.

Continued...

Barriers to Participation in Arts and Cultural Activities

Most Common Barriers

Not enough time (48% 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, the local populace is clearly spending a fair amount of time participating in arts and cultural activities - 71% of them have enjoyed at least one activity within the past year, on average in about 9 activities. So, we can conclude that while ‘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), this study suggests that many do allocate a lot of their free time to arts and cultural events.

Activities cost too much (38%): Cost has an influence on almost every purchase decision, and arts and cultural activities purchases are no different. The burning question here, however, is 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 Greater Akron residents 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,’ - people are willing to pay high ticket prices *if* they feel they are getting a good value for their dollar. Numerous past studies have shown 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 typically 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.

Barriers to Participation in Arts and Cultural Activities

Most Common Barriers

Expensive parking (38%): This is a surprising finding - more than 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. We’ve found that locals do complain about unfair parking prices during special events (mostly referring to ‘downtown’ parking), and although people do understand that arts and cultural institutions are usually separate from parking businesses, this still was reflected on their perceptions about arts and cultural institutions. The point is people often believe they are being 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 (31%): Some regions provide better access to information about upcoming arts and cultural events than others, and this result suggests that there is some room for improvement within the Greater Akron area. That is, we consider it unacceptable that one-third of the arts and cultural customers say that their lack of information about upcoming events keeps them from attending more. We’ve found in past local studies on this topic that, generally, information *is* ‘out there,’ but that one ‘really has to know where to look’ 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.

Barriers to Participation in Arts and Cultural Activities

Most Common Barriers

Traffic after events (29%): This is a surprising find as ‘bad traffic’ is certainly not something the Greater Akron area is often accused of. But almost one-in-three of our respondents said that their fear of facing ‘traffic after events’ prevents them from attending more. Since we know that many of these people attend events in the Cleveland area, where traffic is certainly more of a known problem, we can assume that Cleveland is seen to be more of a culprit than Akron. However, in previous qualitative studies arts patrons frequently complained about the post-performance traffic at Blossom. What was clear was that customers believed that the arts and cultural institutions have a responsibility to manage traffic *after* events, and when this is not done, it reflects on consumers’ opinions about the arts and cultural institutional community as a whole.

Activities are too far away (22%): The population concentration in the Greater Akron area is spread among the six counties included in this study, so we would expect many of them to see distance as a barrier. However, with only about one-in-five respondents seeing distance as a barrier, we can conclude that Akron-centric arts and cultural institutions should consider the **entire 6 county region** as a viable market.

Activities require a lot of planning (21%): We’ve learned in past studies 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.

Barriers to Participation in Arts and Cultural Activities

Somewhat Common Barriers

Lack of the type of activities I enjoy most (20%): It is very clear that residents of Greater Akron have very diverse tastes for arts and cultural activities. 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. However, the overriding sentiment from the research was that NE Ohio as a whole 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.

I only like activities when I am familiar with the artists (20%): We can conclude from this relatively infrequent complaint 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 the Greater Akron market.

It is difficult to get good seats (19%): While this was reported as a barrier by only one-in-five survey respondents, when examined in depth, it highlights a bigger problem that the arts and cultural community needs to be leery about. That problem is **lack of fairness**. We’ve learned that often members of the general public believe that they have complete lack of access to the ‘best seats.’ That is, regardless of how they attempt to source tickets, they cannot obtain the best seats. Instead, they believe that ‘radio stations,’ ‘corporations,’ ‘brokers,’ and in some cases ‘subscribers,’ were the only entities with access to the better seats. Arts and cultural fans are offended by this practice. Often they see themselves as the ‘real fans’ yet the better seats go to those actually less interested in the performance. Proof that the best seats do not go to ‘real fans’ but rather to the ‘radio stations’ and ‘corporations’ was the frequently empty seats in the first few rows. This perception adds to the somewhat bitter impression that the arts and cultural institution venues should be more concerned about the average customer’s satisfaction.

Not enough blockbuster activities in area (18%): Fewer than one-in-five respondents felt that the lack of ‘blockbuster’ shows in our area prevents them from attending more events. 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.

Barriers to Participation in Arts and Cultural Activities

Less Common Barriers

Lack of desirable parking (15%): We discussed the complaints over costly parking earlier, but this issue has more to do with convenience. One-in-six of the surveyed arts patrons cited this as a barrier for them, and we know from past studies that this means that most feel that parking *is* fairly close to arts and cultural events and activities. There is little arts and cultural institutions can do without great expense to alleviate this problem if it does exist for them, 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.

Safety of activity's location (15%): This was not a major barrier according to most survey participants, as we've found in previous studies in this area.

I can't pick which seats I want among available seats (15%): 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 they commonly blocked potential customers from choosing their own seats. Because this was mentioned as a barrier by few survey participants, however, we can conclude this is not a weakness for the Greater Akron arts & culture community as a whole.

Activities are in places I am not familiar with (15%): Lack of familiarity with the specific areas of arts and cultural activities appears to be more of a 'bother' than a 'barrier.' However, arts and cultural institutions should take care to not assume that all readers of advertisements are aware of the venue location, especially since Greater Akron arts and cultural institutions draw from such a large geographic region.

Barriers to Participation in Arts and Cultural Activities

Less Common Barriers

Ease of purchasing tickets (14%): This was noted as a barrier by fewer than one-in-six survey participants, suggesting that regional arts and cultural institutions have developed convenient ticketing systems.

I usually avoid activities which are new to me (14%): We discussed earlier how ‘being exposed to new things’ was one of the strongest allures of arts and cultural activities. 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 residents of Greater Akron: as much as possible, relate to their favorite activities - live musical performances, the zoo, professional sports, and arts & crafts fairs.

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 (9%);

Activities themselves take too long (9%);

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%).

Barriers to Participation in Arts and Cultural Activities

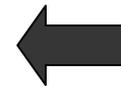
Perceived Barriers By Level of Arts and Cultural Use

Weighted Data (n=550)

Barriers which were rated higher for:

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

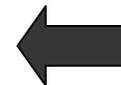
- A lack of the type of activities I enjoy most
- Traffic after events
- Activities cost too much
- Activities are too far away
- Safety of activity's location
- I usually avoid activities which are new to me
- It is difficult to get good seats



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.

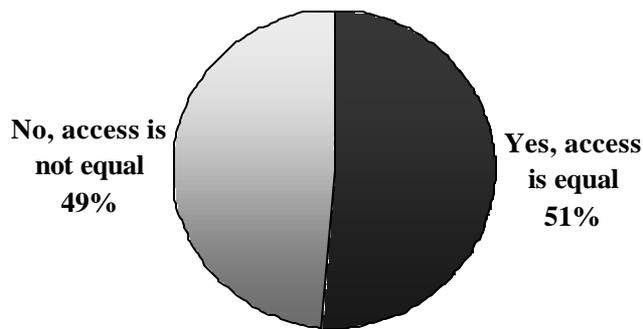
Barriers to Participation in Arts and Cultural Activities

Solutions to Barriers: Fair Access to ‘Good Seats’

Weighted Data (n=239)

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, Greater Akron survey respondents 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.’
- Implications: This is a symptom that residents of Greater Akron feel ‘disconnected’ from the arts and cultural community in that the needs of the ‘average guy’ are supplanted by the needs of larger, more powerful entities (corporations, media organizations, brokers, etc). There is an opportunity for arts and cultural institutions which are so inclined to reach out to their customers and make them *all* feel special. This is a way for arts and cultural institutions to distinguish themselves from other leisure and entertainment providers.

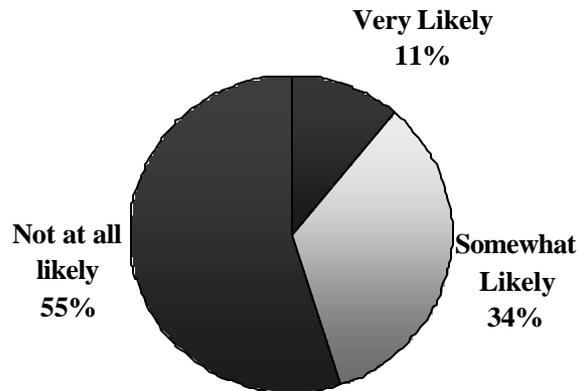
Barriers to Participation in Arts and Cultural Activities

Solutions to Barriers: Arts and Cultural Evening Packages

Weighted Data (n=239)

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, of the total 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



- Past research has shown that one way to alleviate many of the barriers to attendance (cost, distance, unfair parking prices) was to offer 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 11% saying that they would be 'very likely' to purchase a package, and 34% 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 (23% '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.

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Introduction

The finding that almost one-third (31%) 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.

To better understand ways to improve arts and cultural marketing and communications we explored this topic in depth. Past studies have concluded that 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.

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Main Sources of Information

(Unaided and Aided Responses)

Weighted Data (n=137)

- Respondents were asked to describe their ‘**main sources** of information regarding upcoming arts and cultural events.’ Shown here are their **unaided** (where they were asked to recall, on their own, what their main sources are) and their **aided** responses (where they were cued on the names of some possible sources). Note that respondents were not asked about all sources on an aided basis; those aided sources were: *Akron Beacon Journal*, *Enjoy Magazine*, *The Call & Post*, *Focus*, *West Side Leader*, *Sun Newspapers* (which they were asked to specify) and other community-based newspapers not otherwise mentioned, which they were asked to specify).
- We can see that the *Akron Beacon Journal* (along with its entertainment focused *Enjoy Magazine*) was the **most commonly mentioned main source of information**. However, the local, community-based newspapers also are commonly used - 74% of all respondents mentioned at least one of the local community newspapers as one of their main sources.

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

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

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

****Aided questions were only asked of those that did not offer that specific response on an unaided basis.

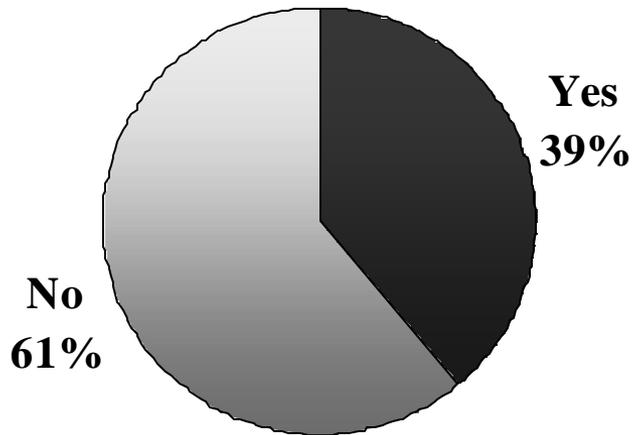
	% of Respondents*		
	Unaided	Aided****	Unaided + Aided
Major Market Newspapers			
<i>Akron Beacon Journal</i>	34.4%	47.5%	81.9%
<i>Enjoy Magazine</i>	1.6%	29.3%	30.9%
<i>Cleveland Plain Dealer</i>	8.6%	**	-
Local Community Newspapers			
<i>A Sun Newspaper</i>	3.9%	15.4%	19.3%
<i>Call and Post</i>	-	1.7%	1.7%
<i>Canton Repository</i>	8.6%	.8%	9.4%
<i>Cuyahoga Falls Press</i>		.8%	-
<i>Daily Record</i>		1.5%	-
<i>Falls News Press</i>		.8%	-
<i>Focus</i>	-	10.2%	10.2%
<i>Gateway News</i>	0.8%	**	-
<i>Green Leader</i>		.8%	-
<i>Hinkley Reporter</i>		.8%	-
<i>Hudson Hub Times</i>	0.8%	**	-
<i>Medina Gazette</i>	0.8%	.8%	1.6%
<i>News Leader</i>	3.9%	**	-
<i>Record Courier</i>	0.8%	1.5%	2.3%
<i>Stow Century</i>		.8%	-
<i>Suburbanite</i>		1.5%	-
<i>The Independent</i>		2.3%	-
<i>The Reporter</i>	0.8%	1.5%	2.3%
<i>West Side Leader</i>	1.6%	12.9%	14.5%
<i>Wooster Daily</i>	0.8%	**	-
<i>Other</i>		1.5%	-
Television			
Television ads	13.3%	**	-
Television news	11.7%	**	-
Internet	11.4%	20.1%	
Word of mouth	10.8%	**	-
Radio			
Radio ads**	10.9%	**	-
Radio news	8.6%	**	-
<i>Scene Magazine</i>	4.7%	.8%	5.5%
Workplace	2.3%	**	-
Akron-area Alliance Arts Calendar	0.8%	6%	6.8%
Other***	5.5%	**	-

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The Internet

Weighted Data (n=289)

Do You Use The Internet To Find Local Arts and Cultural Activities To Attend?
(of those with Internet access, n=216)



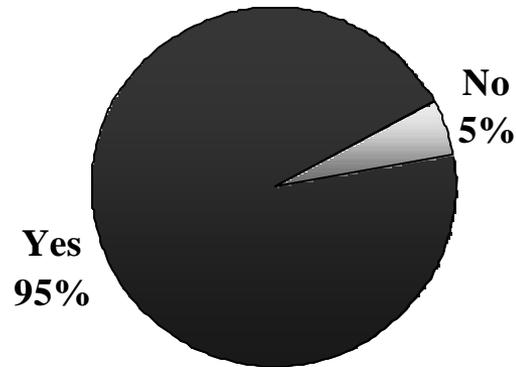
- Seventy-five percent of the survey respondents have regular access to the Internet either at home or at work (not shown).
 - As we see with all studies of Internet usage, younger consumers (under age 55) are more likely to have Internet access (84%) than those over age 55 (37%).
- Of those with access to the Internet, 39% use the Internet to look for local arts and cultural activities to attend (this represents 20% of the total sample base).

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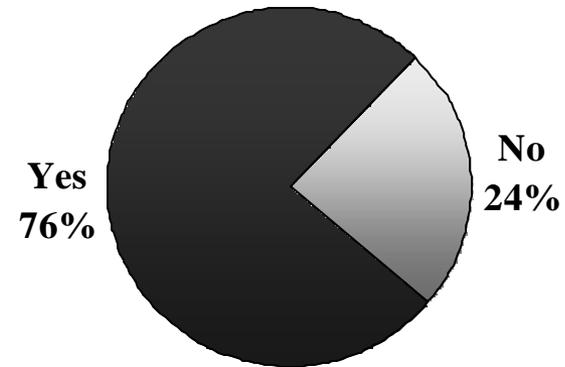
Enjoy Magazine

Weighted Data (n=40)

Easy to find needed arts and cultural event information in *Enjoy Magazine*?
(of those that read *Enjoy Magazine*, n=40)



Does *Enjoy Magazine* provide enough advanced coverage of events?
(of those that read *Enjoy Magazine*, n=40)



- Almost all (95%) of the 40 respondents who regularly check *Enjoy Magazine* for arts and cultural events felt that it was 'easy to find' the information they were looking for.
- Readers of *Enjoy Magazine*, however, were more critical of the magazine's ability to provide them with advanced warning of interesting arts and cultural events and activities, with 24% saying that the magazine did not provide enough advanced coverage.

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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=85)

	% of Respondents*
Ohio.com	26%
Cleveland.com	16%
Yahoo	13%
Ticketmaster.com/Tickets.com	10%
AOL	10%
PlayhouseSquare.com	8%
General search engines	8%
Google.com	4%
ClevelandLive	4%
CleveScene.com	4%
Radio Stations/Venue sites	4%
MSN.com	2%
ClevelandEntertainment.com	2%

- We estimate that about one-in-five of the Greater Akron arts & culture patrons use the Internet to find information regarding these activities, and based on their responses it appears that there is no one website which is favored by a majority of respondents.
- Twenty-six percent of those that use the Internet to find local arts and cultural activities to attend (or 8% of the total base of respondents) reporting using www.Ohio.com for this purpose. Cleveland.com was a favored site by 16% of the respondents. A good portion of respondents reported using some type of general search engine for this purpose (Yahoo, 13%; AOL, 10%; ‘General searches,’ 8%; Google, 4%; or MSN, 2%).

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

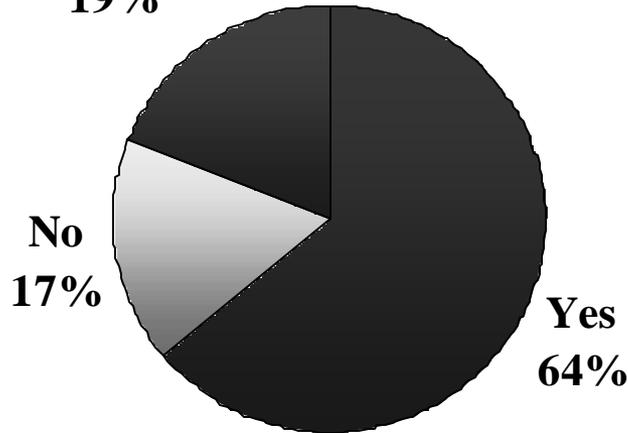
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www.Ohio.com

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

(of those that visit that site, n=20)

Not Sure
19%



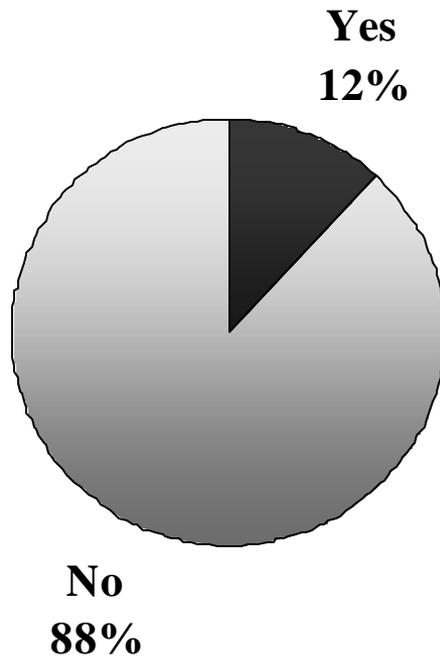
- A majority of visitors to Ohio.com feel that they can easily obtain arts and cultural activities information from that site. Even though only 17% reported not finding this site an easy source of information, this overall finding appears to be an endorsement of the utility of that site for the arts 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.

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www.ArtsInOhio.com

Have you heard of www.ArtsInOhio.com?

(Of those that use the Internet to source arts and cultural activities; n=85)



- Only about one-in-ten respondents that were asked about their awareness of www.ArtsInOhio.com responded affirmatively.
- Almost all that were aware of this website had an educational level at or above a four-year college degree and had annual incomes of at least \$50,000.

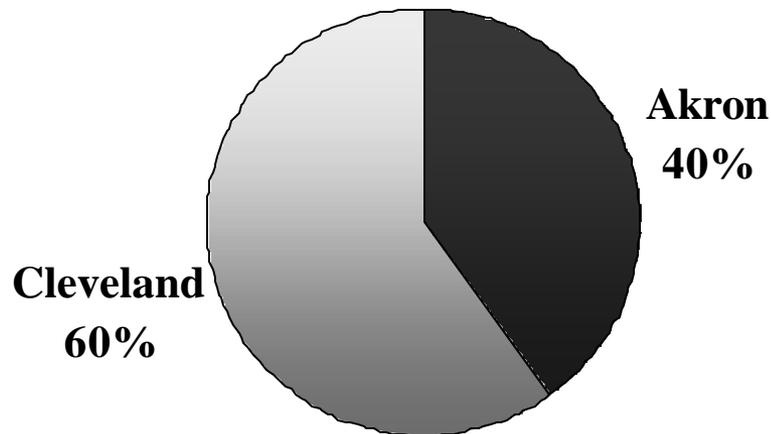
Special Topics: Akron vs. Cleveland as the Arts and Cultural Centers

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

Preference for Akron vs. Cleveland

Weighted Data (n=342)

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



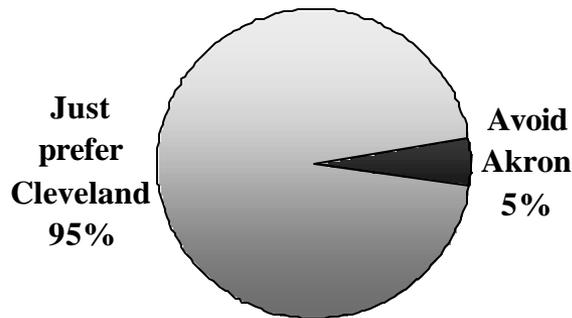
- Although the vast majority of respondents in this study reside closer to Akron than Cleveland, as a group, these respondents prefer Cleveland as a destination for arts and cultural activities over Akron (60% vs. 40%, respectively).
- Stark and Wayne counties are only counties where a majority of respondents (58%) preferred Akron to Cleveland.
- This result is perhaps understood in the context of the *reasons* that people attend arts and cultural events. 'Escape' was noted as one of the primary attractions, and maybe for many of those in the Akron area, Cleveland represents more of an escape than Akron does. For those in Stark and Wayne counties, Akron could be more likely to satisfy that need for escapism.

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

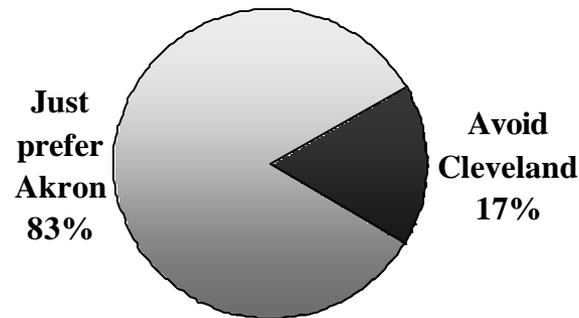
Avoidance of Cleveland or Akron

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

Those that prefer Cleveland (n=192)



Those that prefer Akron (n=128)



- It appears that for both those that prefer Cleveland and those that prefer Akron, the preference is just that - a preference. That is, few reported any compelling reason for avoiding either Akron or Cleveland. Seventeen percent of those that prefer Akron reported that they actively 'avoided' Cleveland, and their reasons centered around the distance that they would need to travel to a Cleveland-based activity. A few complained about traffic and/or parking, but no one expressed a concern about safety.
- There were attitudinal differences between those that preferred Akron and those that preferred Cleveland in terms of perceived barriers to attendance at arts and cultural activities. Specifically, those that prefer Akron were more likely to stress the importance of 'lack of desirable parking,' 'traffic after events,' and the 'cost of activities' as barriers to their more frequent attendance. These sentiments should be stressed by Akron-area arts and cultural institutions in their marketing to Akron area residents.

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	4%
A teacher (specific)	6%
Family Members:	
Parent(s)	29%
Family (general)	9%
Brother/Sister	1%
Grandparent	7%
Aunt/Uncle	5%
Music teacher/instructor	3%
Adult Influences	
Adult friend	4%
Spouse	6%
My children	6%
College	2%
A specific event/Program/Play	4%
A specific artist/author/performer	7%
Self	3%
No one/Nothing specific	<1%
Other	1%
Not Sure	1%

- Seventy-nine percent of respondents reported participating in school field trips to arts and cultural institutions - this is somewhat lower than the total NE Ohio average we found in the previous study (88%).
- Previous research has clearly shown that most arts and cultural consumers had some *one* in their youth or young adulthood that strongly influenced their current level and type of arts and cultural activities that they pursue. **Eighty-two percent of our survey participants could name a specific person or event that most influenced them** (as opposed to 95% of all of NE Ohioans). 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). We've learned from past research that this appreciation for the influence of those key adults during their youth that make many 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%.

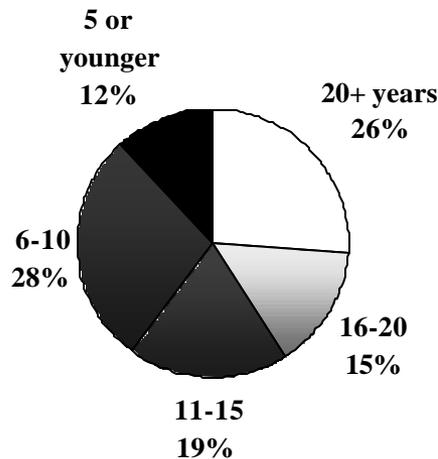
Special Topics: Key Influences on Arts and Cultural Participation

How does a community influence consumption of arts & culture?

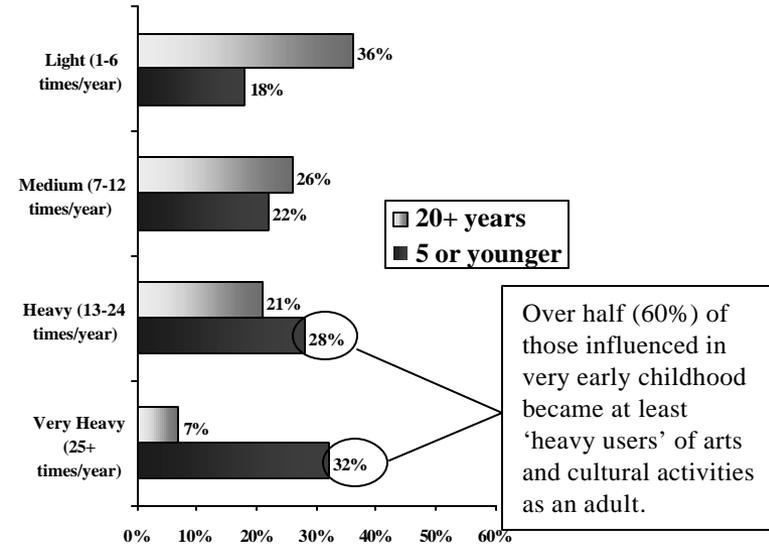
Weighted Data (n=550)

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



Relationship of Age of First Influence and Adult Frequency of Attendance



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 (36% of those influenced after age 20 are 'light users' vs. 18% of those influenced in early childhood). Likewise, over half (60%) 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 or after early adulthood.



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