Regenerating the Jazz Audience: A Segmentation Analysis of Jazz Ticket Buyers

Contents

Executive Summary

- This report is the second in a pair of research reports investigating the attitudes, behaviors, preferences and values of jazz ticket buyers drawn from the customer lists of a national cross-section of jazz presenters. The first report covers survey results by partner organization, and includes cross-tabulations of results by age, race and gender. This report focuses on the results of a cluster analysis undertaken for the purpose of generating a new "customer model" for jazz ticket buyers, and provides detailed profiles of the new segments.

- The partners in this study included Jazz Arts Group (Columbus, Ohio – lead partner), Jazz at Lincoln Center (New York City), SFJAZZ (San Francisco), Jazz St. Louis, Monterrey Jazz Festival, Sculler's Jazz Club (Boston), and the Major University Presenters consortium (13 presenters each contributed a small number of jazz buyers to the sample).

- A cluster analysis was performed on a sub-set of attitudinal variables relating to experience with music, knowledge and interest in jazz, purchase decision factors, live arts attendance, jazz listening patterns and consumption. The clustering procedure groups ticket buyers into discrete segments that are as different as possible across segments, and as similar as possible within each segment.

- In consultation with the study partners, a six-segment model was selected. Brief descriptions of each segment follow:
  - **Segment 1: Knowledgeable Musicians (14%)** are young men highly active in a range of music activities. Almost half are professional artists themselves. They seek intellectually challenging jazz experiences and have eclectic tastes in music. Their strongest preferences in jazz focus on Standards and Masters and Eclectic and World artists, like Charlie Parker, Antonio Carlos Jobim and Robert Glasper. A lot of their regular communications and listening activity takes place online or through their cell. In particular, they browse and watch YouTube videos and interact with friends on Facebook on a regular basis.
  - **Segment 2: Jazz-Centered Omnivores (17%)** pride themselves on their vast and diverse jazz music collection. They regularly attend live jazz shows, as well as take in a museum exhibit and world music concert regularly as well. Attending live shows is often how they hear about new music. Interested in an intellectually challenging and emotionally rewarding jazz experience, they typically stick to the Standards and Masters artists like Charlie Parker, Stan Getz and Roy Hargrove. They are most likely to be African American, single, between the ages of 45 and 64, and also most likely to be interested in exploring their cultural heritage.
  - **Segment 3: Urban Culture Dabblers (17%)** are a mixed bag of interests, experience and activity around music and jazz. Although one of the older skewing segments, they prefer Eclectic and World artists like Jamiroquai and Robert Glasper. Similar to the first two segments, they also prefer intellectually challenging jazz experiences, and to a lesser extent, kinetic and sentimental jazz experiences. They have relatively high levels of knowledge and interest in jazz, but lack as solid and robust a music collection as Jazz-Centered Omnivores.

Executive Summary - Continued

- **Segment 4: Standard Fare Partners (19%)**, typically older (over 55) married men, are akin to Jazz-Centered Omnivores in their likelihood to have a large proportion of their music collection dedicated to jazz. They also have high preferences for Standards and Masters, in particular Diana Krall. In general, they equally prefer intellectually challenging and kinetic ("make me want to tap my toes") experiences,
- **Segment 5: Social Butterflies (20%)** are most likely to be younger women, motivated by the social aspect of going to see a live jazz show. They are sensitive to price, and given a busy social calendar, are most likely to consider the day of the week in making purchase decisions. Although they have lower levels of knowledge than others, they are highly interested in learning more about jazz, and prefer jazz that makes them want to move (kinetic experiences). Similar to Knowledgeable Musicians, they regularly use social networking websites and mobile apps.
- **Segment 6: Comfort Seekers(12%)** are the least knowledgeable and least active of all segments. Although they have a background in music, they are more likely to go to a stage play or classical music concert than a jazz concert. Their preferences tend towards the Pop Crossover artists like Kenny G., and Latin jazz like Antonio Carlos Jobim. Like Social Butterflies, they prefer kinetic jazz experiences, followed by the sentimental or nostalgic experience ("takes me back to another time and place").

- Overall the segmentation analysis revealed the diversity of experience and knowledge about jazz amongst ticket buyers. This suggests a need to develop different packaging approaches and different levels of educational programming for different segments. For example, what educational experiences might be for Social Butterflies, who do not know much about jazz but are interested in learning more?

- Overall, the cluster analysis identifies distinct segments of customers with different music backgrounds, different venue preferences, and different preferences for artists. While it is daunting to consider the tactical implications of communicating differently with six segments, this should not be the implied outcome of the study. Rather, we recommend focusing on the similarities between segments, from which you may fashion programming initiatives and marketing materials that speak to multiple segments simultaneously. For example, what new programing initiatives might build knowledge levels amongst segments that want to listen to more jazz, but do not own large collections of jazz music? What programs or packages might be offered to segments that idealize more kinetic experiences? Working at the "crossroads" between segments provides a more nuanced view of ticket buyers, and hopefully creates options for addressing implementation challenges around the new customer model.

Survey Methodology and Response

- The ticket buyer survey protocol was designed in tandem with a prospect survey protocol, which focused on music lovers in the greater Columbus area. The design process was highly consultative, with all partners reviewing and recommending revisions. In particular, the section protocol investigating artist preferences required greater discussion and testing before being finalized. In addition, focus groups were conducted to test the face validity of the survey, and resulted in further revisions.

- A field test/re-test was conducted in order to assess the reliability of protocol design. A group of approximately 40 individuals took the survey online, and then completed the same survey again after two weeks. Reliability tests were performed and reflected favorably on the design.

- A detailed research and sampling plan was developed. Overall, 19 organizations cooperated with the data collection effort (see next page). One of the key goals of constructing the partnership was to be able to develop a diverse sample of jazz ticket buyers from different market areas, both non-profit presenters, festivals and clubs. While the seven samples constitute a diverse cross-section of jazz presenters, they do not, in aggregate, represent a sample of all jazz audiences nationally. Rather, this was a cross-sectional random sampling effort aimed at producing representative results within each of the seven samples.

- Random samples were drawn from partners' ticket buyer databases of current buyers (i.e., buyers who have purchased tickets within the past three seasons), with some exceptions, as follows:
  - Jazz Arts Group (Lead Partner): canvass of 3,614 current buyers
  - Jazz at Lincoln Center: 3,000 buyers (random sample)
  - Jazz at St. Louis: 3,000 buyers (random sample)
  - SFJAZZ: 3,000 buyers (random sample)
  - Monterey Jazz Festival: 5,000 buyers (online sample only)
  - Sculler's Jazz Club: 17,000 buyers (online sample only)
  - Major University Presenter Consortium: random sample of 3,000 buyers constructed from smaller random samples of 13 partners

- A final version of the survey was fielded in summer and fall of 2010. To maximize response, two data collection efforts were undertaken. First, an online survey was administered to those buyers in the samples with email addresses (32,780 out of 37,614). The overall response from the online survey was 3,232 completed surveys, or 10%. Next, non-respondents to the online survey, along with buyers in the sample without email addresses, were mailed a copy of the survey with a postage-paid reply envelope. The mail approach generated another 1,623 responses, or 12% of those mailed. Altogether, 4,855 fully-completed surveys were received, representing an overall response rate of 13%. For cost and other reasons, Monterey Jazz Festival and Sculler's Jazz Club buyers were only administered the survey online.

- Results reported in this document are based on weighted data.

Response Report

STUDY PARTNERS	Total Sample	ONLINE DISTRIBUTION			MAIL DISTRIBUTION			TOTAL RESULTS	
		# Emails Sent	# Completes	Response Rate	# of Mail Surveys Sent	# Mail Surveys Received	Response Rate	Total # Respondents	Overall Response Rates
Jazz Arts Group (Columbus, OH)	3,614	2,021	332	16%	3,304	534	16%	866	24%
Jazz at Lincoln Center (New York, NY)	3,000	2,581	158	6%	2,759	256	9%	414	14%
Jazz St. Louis (St. Louis, MO)	3,000	1,592	253	16%	1,801	193	11%	446	15%
SFJAZZ (San Francisco, CA)	3,000	2,419	127	5%	2,797	218	8%	345	12%
Monterey Jazz Festival (Monterrey, CA)	5,000	5,000	950	19%				950	19%
Sculler's Jazz Club (Boston, MA)	17,000	17,000	1,043	6%				1,043	6%
Sub-Total, Six Partners	*34,614*	*30,613*	*2,863*	*9%*	*10,661*	*1,201*	*11%*	*4,064*	*12%*

MAJOR UNIVERSITY PRESENTERS (COMBINED SAMPLE)	Total Sample	# Emails Sent	# Completes	Response Rate	# of Mail Surveys Sent	# Mail Surveys Received	Response Rate	Total # Respondents	Overall Response Rates
Annenberg Center for the Performing Arts	244	128	8	6%	237	32	14%	40	16%
Hancher Auditorium (Univ. of Iowa)	239	146	12	8%	231	46	20%	58	24%
Krannert Center (Univ. of Illinois)	89	54	99	N/A	77	21	27%	N/A	N/A
Mondavi Center (UC Davis)	355	269	44	16%	313	49	16%	93	26%
Penn State Center for the Performing Arts	160	99	21	21%	138	21	15%	42	26%
Stanford Lively Arts	214	136	7	5%	203	29	14%	36	17%
Texas Performing Arts (Univ. of Texas)	163	146	24	16%	141	15	11%	39	24%
UAPresents (Tucson, AZ)	351	271	39	14%	318	48	15%	87	25%
Clarice Smith Center at Maryland	137	114	13	11%	127	20	16%	33	24%
UMN Northrop Auditorium	78	52	11	21%	67	18	27%	29	37%
University Musical Society (Ann Arbor)	686	525	70	13%	618	76	12%	146	21%
University of Florida Performing Arts	151	94	15	16%	138	33	24%	48	32%
Wexner Center for the Arts (Ohio State Univ.)	133	133	6	5%	127	14	11%	20	15%
Sub-Total, All MUP Responses	*3,000*	*2,167*	*369*	*17%*	*2,716*	*422*	*16%*	*791*	*26%*

Weighting & Limitations of the Data

- Given the design of the sampling approach and our desire to generalize as accurately as possible about all partner ticket buyers, it was appropriate to weight the data to adjust for various sources of known bias in the data.
- To adjust for the relative sizes of the customer lists weights were applied to align response figures with the actual proportion of each partners' ticket buyer list within the overall universe of jazz customers.
- Additional sources of bias in the data may relate to age and gender. People who respond to these types of audience surveys tend to be older, and tend to be females. Given that the actual age and gender distributions of jazz ticket buyers are not known, we were unable to weight for these factors.
- The other source of bias normally associated with online response would be income. Given the relative affluence of the partners' customer base, however, this is not considered to be a significant bias in this case.

Segmentation Results

Cluster Analysis Methodology

- A cluster analysis was performed on the aggregation of the 19 partner organizations ticket buyer samples. The total number of cases involved in the cluster analysis was 4,370.
- Cluster analysis is a statistical technique used to group respondents into distinct segments based on a specific set of variables.
  - Development of a customer model is part art and part science. The "art" of the analysis lies in determining which variables are allowed into the cluster analysis, and how those variables are coded. The quality of the model depends heavily on the underlying quality of the protocol design. The analyst can also choose the number of segments in the preferred solution.
  - The "science" in the analysis lies in the statistical procedure used to group respondents into segments that are as different as possible across segments, and as similar as possible within segments.
  - Clustering is a not a perfect science; some respondents may have characteristics associated with several segments, but are assigned to the one segment which they most resemble.
- Four different iterations of clustering were run until an optimum, intuitive segmentation solution was achieved. A six-segment solution was chosen.
  - The three, four, and five segment solutions were discarded as not being able to provide enough discretion to represent the diversity of jazz buyers within this composite sample. However, it is instructive to review the migration of segment members as the number of membership groups increases (e.g., from three to four), as discussed over the following pages, to understand how the segments collapse from six to three.
- The six typologies are based on attitudinal data. The key variables driving the segmentation analysis are: relationship with music and jazz in particular, venue preferences, knowledge and interest in jazz, jazz listening habits, purchase decision factors, preferences for different artists, initiator/responder status, and values.
  - Demographic and purchase data were not allowed into the model, but are used to describe the segments and better understand what distinguishes one cluster from another.

Starting From Three Segments

- Values Driven Musicians (26%):
  - Most likely to be younger men
  - Heavily involved in music activities
  - Highly associated with all values

- Social Culture Omnivores (34%):
  - Attend variety of arts events
  - Likely to be Initiators
  - Like the Jazz Standards and Masters

- Price-Sensitive Comfort Seekers (40%):
  - Most likely to consider cost in decision making
  - Seek jazz experiences that are familiar (that they can hum along to)
  - More likely to be women

Three Segments by Partner
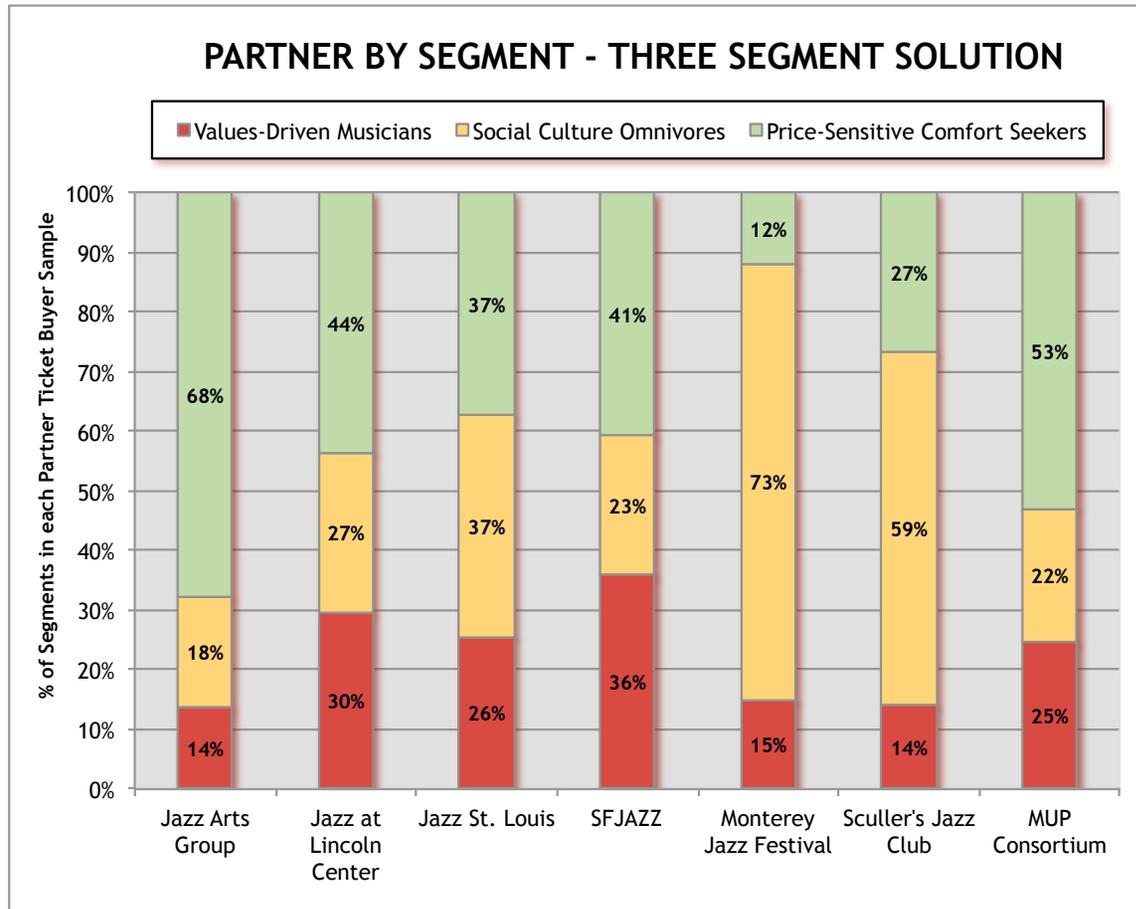
PARTNER BY SEGMENT - THREE SEGMENT SOLUTION

- ■ Values-Driven Musicians ■ Social Culture Omnivores ■ Price-Sensitive Comfort Seekers

% of Segments in each Partner Ticket Buyer Sample

Partner	Values-Driven Musicians	Social Culture Omnivores	Price-Sensitive Comfort Seekers
Jazz Arts Group	14%	18%	68%
Jazz at Lincoln Center	30%	27%	44%
Jazz St. Louis	26%	37%	37%
SFJAZZ	36%	23%	41%
Monterey Jazz Festival	15%	73%	12%
Sculler's Jazz Club	14%	59%	27%
MUP Consortium	25%	22%	53%

- The chart at left shows the proportion of each segment within each partner's ticket buyer sample.
- All segments are represented amongst each partner's base of buyers.
- JAG buyers predominately consist of Price-Sensitive Comfort Seekers (68%)
- Monterey Jazz Festival and Sculler's Jazz Club buyers are most likely to be Social Culture Omnivores (73% and 59%, respectively).
- SFJAZZ and JALC are most likely to be Values-Driven Musicians (36% and 30% respectively).

Migrating From Three to Six Segments

- In examining cluster segmentation solutions, a migration analysis was conducted in order to understand the progression from three to four to five and finally six segments. Typically, a number of segment characteristics from the smaller segment solutions (i.e., three segments) carry through to subsequent solutions.

- The diagram on the following page describes this migration from one solution to the next. In each subsequent solution, respondent groups are further refined to reveal more detailed and uniform characteristics across segmentation variables (i.e., not demographics).

- This diagram may serve as a roadmap to develop programs and communications that might engage more than one segment, given how each new segmentation configuration contains elements of previous iterations. For example, commonalities between Urban Culture Dabblers and Social Butterflies may be exploited to create programs that would attract a multiplicity of segments.

Migration of Segments

Values-Driven Musicians

Social Culture Omnivores

Price-Sensitive Comfort Seekers

Knowledgeable Musicians

Jazz-Centered Omnivores

Social Butterflies

Comfort Seekers

Knowledgeable Musicians

Jazz-Centered Omnivores

Urban Culture Dabblers

Social Butterflies

Comfort Seekers

Knowledgeable Musicians

Jazz-Centered Omnivores

Urban Culture Dabblers

Standard Fare Partners

Social Butterflies

Comfort Seekers

Four Segment Solution

- Knowledgeable Musicians (22%):
  - Maintains all characteristics of Values-Based Musicians
  - Most likely to be younger men
  - Heavily involved in music activities
  - Seek intellectually challenging jazz experience

- Jazz-Centered Omnivores (27%):
  - Maintain many of same characteristics of Social Culture Omnivores
  - Attend a variety of arts events
  - Strong preference for Standards and Masters artists
  - Seek emotional experience through jazz

- Social Butterflies (28%):
  - New segment that is a combination of Social Culture Butterflies and Price-Sensitive Comfort Seekers
  - Most likely to be women
  - Most price-sensitive
  - Most likely to be Initiators or Responders

- Comfort Seekers (23%):
  - Segment retains older and less social aspects of Price-Sensitive Comfort Seekers
  - Least knowledgeable about jazz and least involved in music activities
  - Seek jazz experiences that are familiar (that they can hum along to)

Four Segments by Partner

PARTNER BY SEGMENT - FOUR SEGMENT SOLUTION

Legend:
- Knowledgeable Musicians
- Jazz-Centered Omnivores
- Social Butterflies
- Comfort Seekers

% of Segments in each Partner Ticket Buyer Sample

	Jazz Arts Group	Jazz at Lincoln Center	Jazz St. Louis	SFJAZZ	Monterey Jazz Festival	Sculler's Jazz Club	MUP Consortium
Comfort Seekers	42%	25%	20%	19%	7%	11%	37%
Social Butterflies	37%	28%	32%	27%	19%	41%	25%
Jazz-Centered Omnivores	9%	21%	26%	21%	67%	40%	16%
Knowledgeable Musicians	12%	26%	22%	32%	8%	8%	22%

- The four segment solution provides more discretion amongst each partners' ticket buyer groups.
- JAG buyers are most likely to be Social Butterflies and Comfort Seekers, which is intuitive given the three-segment solution distribution (68% were Price-Sensitive Comfort Seekers).
- Monterey Jazz Festival buyers remain primarily in one segment, the Jazz-Centered Omnivores.
- SFJAZZ and JALC buyers are most likely to be Knowledgeable Musicians

Five Segment Solution

- Knowledgeable Musicians (15%):
  - Most likely to be younger men
  - Heavily involved in music activities
  - Highly associated with all values

- Jazz-Centered Omnivores (25%):
  - Second likeliest segment to be male
  - Strong association with Standards and Masters artists
  - Seek emotional experience through jazz

- Urban Culture Dabblers (19%):
  - A combination of Knowledgeable Artists and Social Butterflies
  - Most likely to attend art museums and stage plays
  - Preferences for Eclectic and World (Keith Jarrett) and Pop Crossover (B.B. King) artists

- Social Butterflies (24%):
  - Most likely to be women
  - Like jazz that makes them 'tap their toes'
  - Most likely to be Initiators or Responders

- Comfort Seekers (17%):
  - Least knowledgeable of all segments
  - Seek jazz experiences that are familiar (that they can hum along to)
  - Older than other segments

Five Segments by Partner

PARTNER BY SEGMENT - FIVE SEGMENT SOLUTION

Legend:
- ■ Knowledgeable Musicians
- ■ Jazz-Centered Omnivores
- ■ Urban Culture Dabblers
- ■ Social Butterflies
- ■ Comfort Seekers

Y-axis: % of Segments in each Partner Ticket Buyer Sample (0% to 100%)

Jazz Arts Group: Knowledgeable Musicians 6%, Jazz-Centered Omnivores 9%, Urban Culture Dabblers 17%, Social Butterflies 35%, Comfort Seekers 34%

Jazz at Lincoln Center: Knowledgeable Musicians 12%, Jazz-Centered Omnivores 19%, Urban Culture Dabblers 33%, Social Butterflies 19%, Comfort Seekers 17%

Jazz St. Louis: Knowledgeable Musicians 18%, Jazz-Centered Omnivores 23%, Urban Culture Dabblers 13%, Social Butterflies 32%, Comfort Seekers 14%

SFJAZZ: Knowledgeable Musicians 19%, Jazz-Centered Omnivores 19%, Urban Culture Dabblers 30%, Social Butterflies 19%, Comfort Seekers 13%

Monterey Jazz Festival: Knowledgeable Musicians 12%, Jazz-Centered Omnivores 63%, Social Butterflies 20%, Comfort Seekers 5%

Sculler's Jazz Club: Knowledgeable Musicians 11%, Jazz-Centered Omnivores 39%, Social Butterflies 42%, Comfort Seekers 7%

MUP Consortium: Knowledgeable Musicians 16%, Jazz-Centered Omnivores 14%, Urban Culture Dabblers 17%, Social Butterflies 22%, Comfort Seekers 30%

- The five segment solution by partner (shown in chart at left), is very similar to that of the four segment solution.
- One of the main differences is where the "new" segment, Urban Culture Dabblers, appears.
- It is clear that Urban Culture Dabblers are most likely to represent JALC and SFJAZZ buyers (33% and 30%, respectively), representing the two major urban presenters in the group. This is not surprising, given the finding from the main report about how JALC and SFJAZZ buyers were more likely to attend other arts events, outside of jazz, than other buyer groups, in particular, museums and stage plays (in the case of JALC).

Six Segment Solution

- Knowledgeable Musicians (14%):
  - Most likely to be younger men (80% male)
  - Heavily involved in music activities
  - Seek intellectually challenging jazz experiences

- Jazz-Centered Omnivores (17%):
  - Second most likely to be male
  - High preference for Standards and Masters artists
  - Seek emotional experience through jazz
  - Most likely to be single

- Urban Culture Dabblers (17%):
  - Most likely to attend art museums and stage plays
  - Preferences for Eclectic and World (Keith Jarrett) and Pop Crossover (B.B. King) artists

- Standard Fare Partners (19%):
  - Combination of Jazz-Centered Omnivores and Social Butterflies
  - Prefer Standards and Masters, in particular, Diana Krall
  - Likely to be older married men


- Social Butterflies (20%):
  - Most likely to be women
  - Like jazz that makes them 'tap their toes'
  - Most likely to be Responders

- Comfort Seekers (12%):
  - Least knowledgeable of all segments
  - Seek jazz experiences that are familiar (that they can hum along to)
  - Older than other segments

Six-Segment Jazz Ticket Buyer Model

JAI Ticket Buyer Model: Six Segment Solution
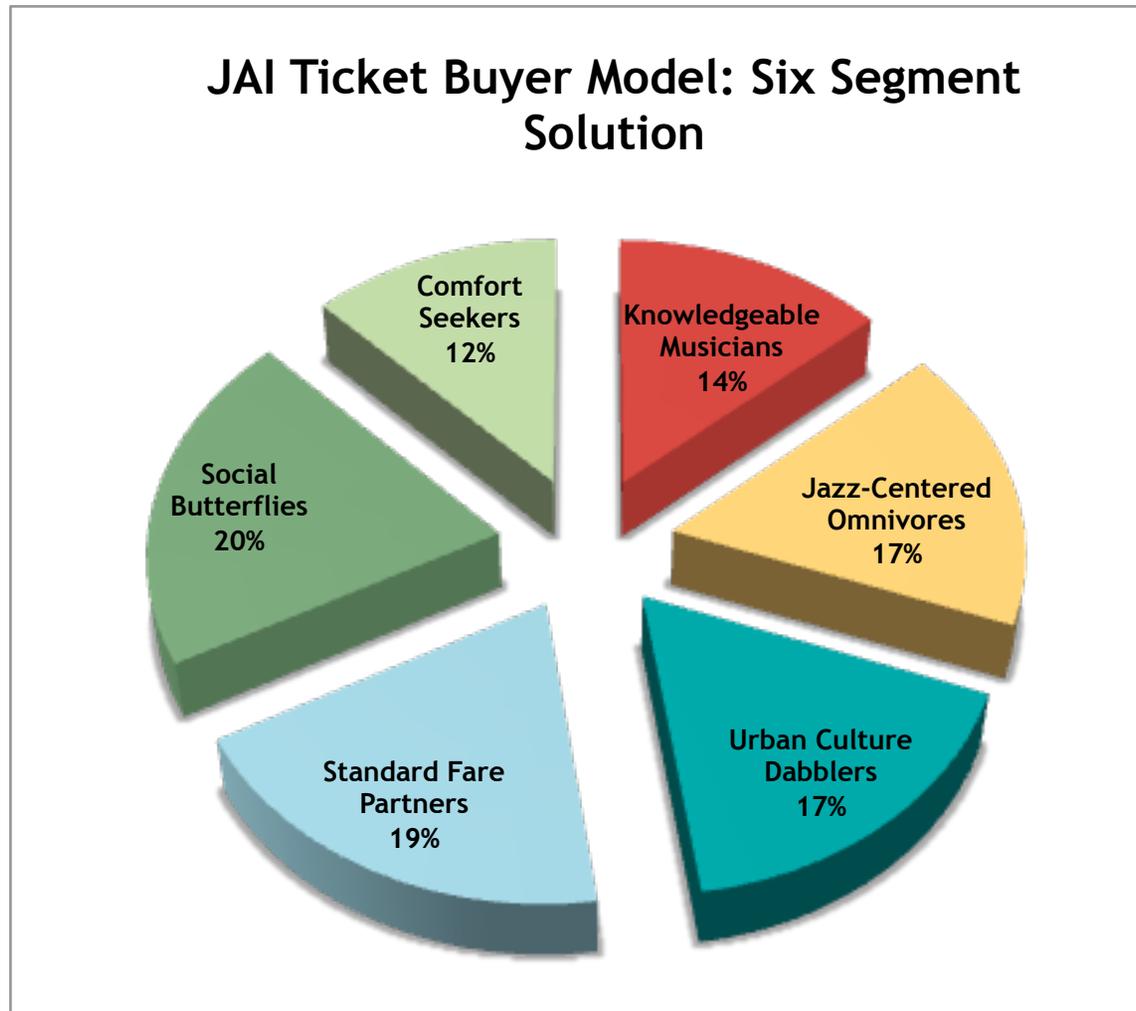
- As noted on the previous pages, three, four, five, and six-segment cluster solutions were considered as potential models.
- The six segment solution was chosen as the most actionable, given the level of distinction amongst different partner ticket buyer groups.
- The segments are ordered by knowledge and connection to jazz, from Knowledgeable Musicians (most knowledgeable) to Comfort Seekers (least knowledgeable).
- This model is proprietary to the Jazz Arts Initiative partners' ticket buyer base only, and should not be generalized to the audiences of other jazz presenters.
- Segment names are necessarily ambiguous and were designed to capture the essence of the segment.

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Six Segments by Partner

PARTNER BY SEGMENT - SIX SEGMENT SOLUTION

Legend:
- Knowledgeable Musicians
- Urban Culture Dabblers
- Social Butterflies
- Jazz-Centered Omnivores
- Standard Fare Partners
- Comfort Seekers

% of Segments in each Partner Ticket Buyer Sample

Segment	Jazz Arts Group	Jazz at Lincoln Center	Jazz St. Louis	SFJAZZ	Monterey Jazz Festival	Sculler's Jazz Club	MUP Consortium
Comfort Seekers	27%	11%	10%	9%	3%	5%	24%
Social Butterflies	31%	20%	25%	22%	7%	22%	21%
Standard Fare Partners	14%	16%	—	11%	41%	—	13%
Urban Culture Dabblers	15%	29%	22%	26%	—	36%	16%
Jazz-Centered Omnivores	7%	12%	12%	14%	37%	26%	11%
—	—	—	14%	—	—	—	—
Knowledgeable Musicians	6%	11%	17%	17%	11%	10%	15%

- The chart at left shows the proportion of each segment within each partner's ticket buyer sample.
- Overall, all six segments are found within every partner's ticket buyer group.
- JAG buyers are most likely to be Social Butterflies and Comfort Seekers, whereas JALC and SFJAZZ are most likely of all partners to have Urban Culture Dabblers in amongst their buyers.
- Note how Monterey Jazz's buyers typically fall into two segments: Jazz-Centered Omnivores and Standard Fare Partners.
- This segmentation solution allows partners to see the unique diversity within each of their ticket buyer groups. In comparison with the other solutions, this one provides the greatest amount of discretion to be able to serve a diverse partnership.

Knowledgeable Musicians (14%)

Kevin is known to his friends as a **Knowledgeable Musician**. He plays several instruments (piano and guitar at least), and spends most of his free time, when he isn't playing, listening to music and going to see live shows. Kevin has been concentrating most of his music listening and experience on jazz these days, and he is interested in learning more about different artists and styles. Artists experimenting and presenting intellectually challenging work is what most attracts him, and he often spends time combing through YouTube videos to find examples of live shows of favorite artists he hasn't been able to see.

Key Characteristics of the Knowledgeable Musician:
- Most knowledgeable and interested in jazz of all segments; their loyalty is to the art form and the artist
- Most likely of all segments to be male
- Along with Social Butterflies, they are one of the youngest segments, with 24% under 34 years old, and 39% under 45
- Most likely to be interested in intellectually challenging jazz experiences
- Most eclectic tastes in artists, with high preference for both Standards and Masters and Eclectic and World artists; in particular Charlie Parker, Stan Getz, Antonio Carlos Jobim, and Robert Glasper
- Most "wired" of all segments, listening to streaming radio online and watching YouTube videos

Jazz-Centered Omnivores(17%)

If you were to review Kyle's music collection, you would know he is a **Jazz-Centered Omnivore**. Over half of his collection is dedicated to jazz, and it keeps growing. Kyle makes it a point to check out shows every weekend at the local club or lounge, constantly soaking up new sounds and learning new things about jazz. A former musician, he'd like to get back into playing, or at least honing his understanding of music. He prefers artists like Charlie Parker and Roy Hargrove, considered Standards and Masters, as well as Latin jazz artists like Poncho Sanchez. Although he mostly wants to engage intellectually with the music, he also enjoys jazz that inspires strong emotions, music that moves him.

Key Characteristics of the Jazz-Centered Omnivore:
- Second to Knowledgeable Musicians in experience and involvement with music
- Most likely of all segments to be non-white (37%, primarily African-American), and second most likely to be single (34%)
- Most active and diverse in arts attendance across different disciplines; in particular most likely to frequent art museums and world music concerts
- On average, jazz comprises over half of their current music collection and new music purchases
- Most likely to be influenced by venue in making purchase decisions
- Second to Knowledgeable Musicians in seeking intellectually challenging outcomes
- Strong preference for standards and masters musicians and Latin jazz artists

Urban Culture Dabblers (17%)

Linda and Dave, **Urban Culture Dabblers**, have a number of different arts programs they engage with on a regular basis. Jazz is one of their favorites, aside from visiting art museums and going to plays or musicals. They are typically loyal to their local jazz organizations and clubs, and often their tastes and music collection are inspired by what they last saw. Some artists they are currently enjoying include Robert Glasper, Hugh Masakela, Jamiroquai and B.B. King. They have a strong background in music and would like to do more, such as take a class on music history or return to playing an instrument. Overall, though, they'd like to go to listen to more jazz in general, and see more live jazz.

Key Characteristics of the Urban Culture Dabbler:
- Older skewing segment with 66% over 55 years old
- Most highly educated segment with 62% having Master's or above
- High frequency on a range of arts events, including arts museums and stage plays
- All have seen jazz in a club or lounge and prefer that atmosphere to others
- Third most knowledgeable and interested in learning more about jazz
- However, the proportion of jazz in their music collection is less than Knowledgeable Musicians, Jazz-Centered Omnivores and Standard Fare Partners
- Preference for Eclectic and World and Pop Crossover artists
- Seek intellectual challenges, followed by kinetic and sentimental jazz experiences

Standard Fare Partners (19%)

Steve and Penny are **Standard Fare Partners**. They attend jazz shows on a regular basis, mostly going to clubs or lounges, but also taking a show in at the larger concert hall, or even a private event at a friends' home. Steven often takes the lead on purchasing tickets for shows, but just as often Penny is the one suggesting who they should see (for example, the last time Diana Krall came through town). They are moderately knowledgeable about jazz, and interested in learning more. Overall, though, they'd just like to listen to more jazz in general, especially live jazz.

Key Characteristics of the Standard Fare Partner:
- Older skewing segment (67% over 55 years old)
- Second most likely to be male (62%)
- Most likely to be married (77%)
- Listen and learn about new music from satellite radio
- Second highest proportion of jazz as part of music collection, behind Jazz-Centered Omnivores
- Preference for artists leans towards Standards and Masters, in particular, Diana Krall
- Interested in kinetic and emotional jazz experiences, equally

Social Butterflies (20%)

Social Butterfly Sophie's calendar is always jam-packed, and she often has nights where she's double booked. Not just simply one to respond to others' invites, she gathers her friends together to go see jazz at a new restaurant or local club. She especially likes to go to shows with music she can dance to, one of the reasons she probably likes Antonio Carlos Jobim (bossa nova anyone?) and Jamiroquai more than Diana Krall. Although not especially knowledgeable about jazz, she'd like to learn more, either through simply listening and becoming familiar with artists or going to more live jazz shows. She most likely will turn to her social network and friends on Facebook to help expose her and teach her about unknown jazz artists.

Key Characteristics of the Social Butterfly:
- Most likely of all segments to be women (59%)
- Second most likely, behind Knowledgeable Musicians to be involved in online activities around music (e.g., download music, play music video games), and second most "wired" of all segments
- Second lowest levels of knowledge, however, strong interest in learning more about jazz
- Most price-sensitive, and most likely to consider day of the week in making purchase decisions
- Most likely to be Responders, and in general socially motivated, with strong value associations for "making new friends and social networks"
- Preference for Pop Crossover artists like B.B. King, and Eclectic and World artist Antonio Carlos Jobim
- Overall low levels of familiarity across all Eclectic and World artists

Comfort Seekers (12%)

Comfort Seekers Ben and Carol enjoy a nice evening out, going to a play or a classical music concert, and also on occasion, attending a jazz show. The jazz shows that interest them the most are those that highlight music that makes them want to tap their toes, like Latin jazz or big band music, or music that brings them back to another time and place, like Kenny G. or Diana Krall. Given their general inexperience and low knowledge levels around jazz, they typically stick with familiar programming.

Key Characteristics of the Comfort Seekers:
- Least knowledgeable of all segments
- Oldest of all segments with 42% over 65
- Second most likely segment to be women (52%)
- Least price-sensitive of all segments
- Lowest level of current involvement in music activities, although past involvement indicates experience with playing an instrument and learning about music
- More likely to visit art museums and attend stage plays and classical music concerts than live jazz
- Preference for Eclectic and World artists like Antonio Carlos Jobim and Keith Jarrett, as well as Pop Crossover artists B.B. King and Kenny G. Most likely of all segments to prefer Kenny G.

Demographic Characteristics

DEMOGRAPHICS BY SEGMENT (WEIGHTED DATA)	Total	Knowledge-able Musicians	Jazz-Centered Omnivores	Urban Culture Dabblers	Standard Fare Partners	Social Butterflies	Comfort Seekers
Sample size (unweighted)	4,370	505	846	474	1086	901	558
Gender							
Female	44%	20%	45%	44%	38%	**59%**	**52%**
Male	56%	**80%**	55%	56%	**62%**	41%	48%
Age							
18-34	10%	**24%**	3%	**2%**	2%	**26%**	4%
35-44	12%	**15%**	11%	**11%**	6%	**20%**	12%
45-54	25%	25%	31%	21%	25%	28%	15%
55-64	33%	28%	39%	**37%**	**43%**	20%	27%
65+	20%	7%	15%	**29%**	**24%**	6%	**42%**
Race							
White/Caucasian	78%	84%	63%	**84%**	83%	74%	83%
Not-White	22%	16%	**37%**	16%	17%	**26%**	17%
Educational Attainment							
High school graduate or G.E.D.	2%	4%	2%	1%	2%	1%	4%
Some college, no degree	10%	11%	13%	6%	12%	9%	**6%**
Associate or Vocational Degree	5%	4%	5%	3%	6%	5%	6%
Bachelor's Degree	32%	33%	33%	29%	30%	39%	25%
Master's Degree	30%	30%	28%	33%	25%	31%	35%
Professional Degree	21%	18%	18%	29%	24%	15%	24%
Work Status (multiple responses allowed)							
Working full-time	58%	64%	63%	53%	56%	67%	43%
Working part-time	12%	17%	11%	13%	12%	10%	10%
In school full-time	3%	**9%**	1%	0%	0%	**7%**	1%
Not employed	4%	3%	4%	5%	3%	5%	1%
Full-time Family Caregiver	2%	2%	2%	1%	2%	4%	3%
Retired	22%	9%	20%	**29%**	**28%**	10%	**43%**
Marital Status							
Married or partnered	70%	70%	66%	73%	77%	59%	74%
Not married or partnered	30%	30%	**34%**	27%	23%	**41%**	26%
Avg. # of Children Under 18							
Avg. # Children	0.28	0.41	0.27	0.27	0.23	0.32	**0.17**

- The table at left shows demographic characteristics by segment.
- Although demographic variables were not allowed into the cluster analysis, and therefore did not have any direct influence on the segment outcomes, it is interesting to note the distinct demographic breakdowns between segments:
  - Eight in ten Knowledgeable Musicians are men
  - Social Butterflies, followed by Comfort Seekers, are most likely to be women (notable in that all other segments skew male)
  - Nearly one-quarter of Knowledgeable Musicians and Social Butterflies are under 34 years old
  - Jazz-Centered Omnivores and Social Butterflies are most likely to be respondents of color (37% and 26%, respectively)

Professional Artist Status

% WHO EARN A PORTION OF THEIR INCOME FROM PERFORMING OR CREATING ART, BY SEGMENT
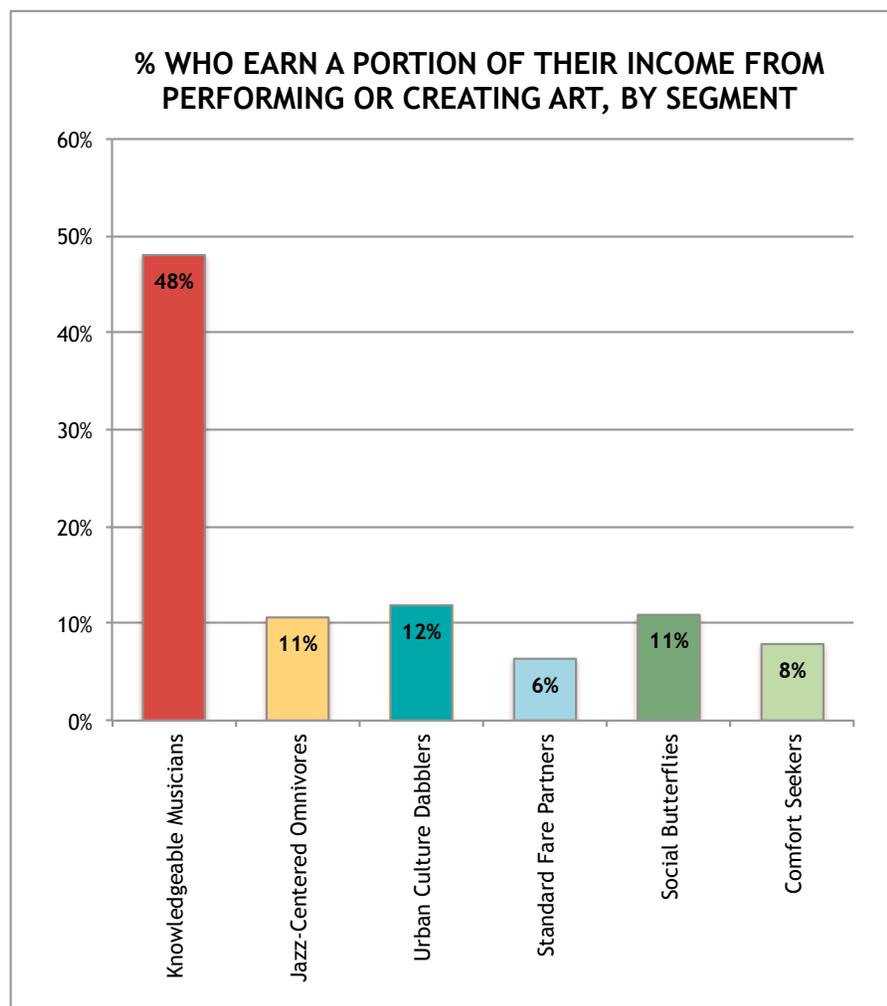
- Respondents were asked if they earn a portion of their income from performing or creating art (i.e., "professional artists"). On average, 15% of all respondents answered "Yes." At left, results are reported by segment.

- Bear in mind that many more respondents reported past involvement in different music activities, such as playing an instrument.

- Not surprisingly, Knowledgeable Musicians are most likely to be artists (48%), and in fact are named as a result of their personal involvement in music activities.

- There is a big decrease in the proportion of artists between Knowledgeable Musicians and the others, with Urban Culture Dabblers second most likely to be professional artists at 12%.

- Other research on cultural engagement has shown a strong association between participatory practice and attendance. Given this relationship, how could jazz presenters take advantage of Knowledgeable Musicians' musical practice and experience to deepen ties to this segment?
  – Could these artists be "ambassadors" to other less experienced segments, such as Social Butterflies, helping to initiate them into the world of music, in general, and jazz, in particular?

Relationship with Music

Current Involvement in Music Activities, by Segment

CURRENT INVOLVEMENT IN MUSIC ACTIVITIES, BY SEGMENT

Knowledgeable Musicians: 64%, 82%, 13%, 57%, 70%, 71%, 55%, 93%

Jazz-Centered Omnivores: 54%, 68%, 7%, 18%

Urban Culture Dabblers: 34%, 53%, 4%, 24%

Standard Fare Partners: 33%, 49%, 11%

Social Butterflies: 54%, 71%, 14%, 19%

Comfort Seekers: 18%, 26%, 11%

Legend:
- Play a musical instrument (red)
- Sing (yellow)
- Perform music in front of an audience (green)
- Compose, edit or arrange music (pink)
- Study music history or appreciation (blue)
- Play musical video games (magenta)
- Download and organize music (cyan)
- DJ, or mix CDs or playlists (orange)

- Respondents were asked to indicate their current or past level of involvement in eight music activities. The chart at left reports the percentages of respondents who indicated current involvement (aggregated samples).
- Overall, "download and organize music" is the top activity across all segments.
- Across the six segments, Knowledgeable Musicians are three times more likely to be involved in music activities – a key distinguishing feature of this segment.
- Social Butterflies, similar in age to Knowledgeable Musicians and Jazz-Centered Omnivores, are second and third, respectively, in terms of active engagement in music activities.

Past Involvement in Music Activities, by Segment

PAST INVOLVEMENT IN MUSIC ACTIVITIES, BY SEGMENT

Segments (x-axis): Knowledgeable Musicians, Jazz-Centered Omnivores, Urban Culture Dabblers, Standard Fare Partners, Social Butterflies, Comfort Seekers

Legend:
- Play a musical instrument
- Sing
- Perform music in front of an audience
- Compose, edit or arrange music
- Study music history or appreciation
- Play musical video games
- Download and organize music
- DJ, or mix CDs or playlists

- Note the high levels of past involvement in activities across segments (with the exception of Knowledgeable Musicians who are currently active).
- Even Comfort Seekers, the least involved segment, reveal past engagement with the art form.
- Previous experience with the art form suggests a possible starting point for further engagement with jazz and jazz programming overall.
  - What would a participatory music program look like for Comfort Seekers, in comparison to other segments?
- Jazz-Centered Omnivores are most likely to have studied "music or music appreciation" (50%).
- Social Butterflies are most likely to have had singing experience in the past (43%).

Current vs. Aspirational Involvement, by Segment

CURRENT VS. ASPIRATIONAL INVOLVEMENT, BY SEGMENT

CURRENTLY INVOLVED

ASPIRE TO IN THE FUTURE

Legend:
- ■ Play a musical instrument
- ■ Sing either alone or with a group
- ■ Perform music in front of an audience
- ■ Compose, edit or arrange music
- ■ Study music history or appreciation
- ■ Play musical video games
- ■ Download and organize music
- ■ DJ, or mix CDs or playlists
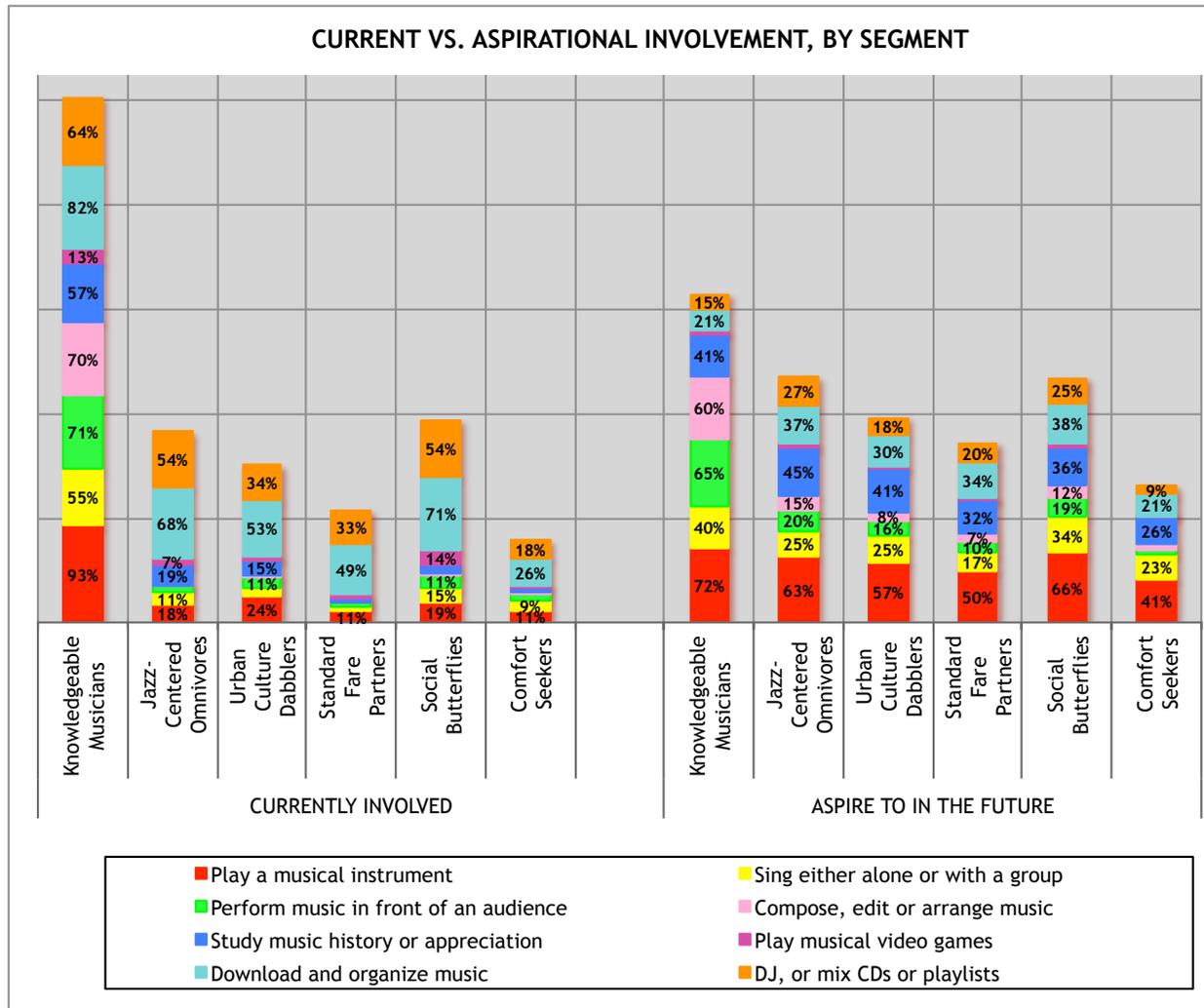
- Respondents were asked a follow-up question: "Which of the following activities would you like to do more often than you do now? (multiple responses allowed) The chart at left compares aggregated responses for current and aspirational involvement. By comparing the size of the bars in the two sets of columns, one can infer levels of "unfulfilled interest" in the various activities, especially "play a musical instrument."

- The youngest skewing segments, Knowledgeable Musicians, Social Butterflies and Jazz-Centered Omnivores, have the strongest aspirations.

- Knowledgeable Musicians would like to continue to hone their musical skills, such as "composing music," and "performing in front of an audience."

- Note the strong desire to "play a musical instrument" across all segments, which suggests a strong mission connection between presentation and education.
  – What participatory programs would tap into this vein of interest?

Information Sources about Unfamiliar Music Artists, by Segment

SOURCES OF INFORMATION FOR DISCOVERING NEW ARTISTS, BY SEGMENT

Legend:
- Recommendations from friends or family members
- Radio
- Ads, feature stories, or reviews
- Suggestions from people you know
- Reading CD reviews
- Local clubs or concert promoters
- Movie soundtracks or TV shows
- Browsing videos on YouTube
- Browsing in record stores
- Music subscripton services
- Satellite radio like XM

Knowledgeable Musicians: 16%, 26%, 32%, 34%, 35%, 43%, 47%, 59%, 60%, 70%, 83%

Jazz-Centered Omnivores: 23%, 27%, 35%, 18%, 38%, 57%, 54%, 48%, 68%, 80%, 78%

Urban Culture Dabblers: 16%, 16%, 23%, 13%, 27%, 21%, 42%, 36%, 57%, 83%, 72%

Standard Fare Partners: 24%, 16%, 22%, 10%, 30%, 39%, 41%, 34%, 61%, 76%, 67%

Social Butterflies: 18%, 25%, 16%, 13%, 50%, 34%, 28%, 46%, 51%, 74%, 81%

Comfort Seekers: 11%, 33%, 15%, 16%, 24%, 50%, 67%, 66%

- Respondents were asked, "How do you discover new or unfamiliar music artists?" (multiple responses were allowed), in an effort to gain insight as to what catalyzes interest in new or unfamiliar artists.

- Note that the volume of sources is significantly higher for Knowledgeable Musicians and Jazz-Centered Omnivores, a reflection of the strength of their overall connection to the art form.

- Jazz Center Omnivores are much more likely than other segments to get information from "local clubs or concert promoters," which makes sense.

- Otherwise, all six segments are most likely to obtain information through word-of-mouth, radio, and print media

- Given the importance of social transmission of taste (as observed in the music listening study), jazz presenters must ask what incentives they can put in place to encourage and reward social transmission of information about jazz artists (e.g., home listening parties, bring a friend promotions, etc.).

Purchase Decision Factors, Attendance Patterns and Venue Preferences

Influence of Purchase Decision Factors, by Segment

AVERAGE INFLUENCE OF FACTORS ON LIVE JAZZ ATTENDANCE, BY SEGMENT

Y-axis: Average Rating (1=Not influential; 7=Very influential)

Legend:
- ◆ Specific artist performing
- △ Cost of tickets
- ◇ Venue (e.g., club or theater)
- △ Day of the week

X-axis segments:
- Knowledgeable Musicians
- Jazz-Centered Omnivores
- Urban Culture Dabblers
- Standard Fare Partners
- Social Butterflies
- Comfort Seekers

- To investigate the salience of key decision factors, respondents were asked, "How influential are each of the following factors in your decisions about whether to attend live music shows?" The chart at left shows results by segment.

- Here we see the clear dominance of the artist as a purchase decision factor across all segments.

- Cost is a more prominent factor for Social Butterflies, while venue is somewhat more important to Jazz-Center Omnivores.

Frequency of Attendance at Types of Arts Events, by Segment

**HIGH FREQUENCY ATTENDANCE
(THREE OR MORE TIMES IN THE PAST 12 MONTHS), BY SEGMENT**

Segments: Knowledgeable Musicians, Jazz-Centered Omnivores, Urban Culture Dabblers, Standard Fare Partners, Social Butterflies, Comfort Seekers

Legend:
- Jazz shows
- Art museums or galleries
- Rock or R&B shows
- Classical music concerts
- Stage plays
- World Music Concerts
- Broadway musicals

Values shown:

Knowledgeable Musicians: 79%, 45%, 39%, 36%, 22%, 20%, 10%
Jazz-Centered Omnivores: 86%, 71%, 40%, 35%, 45%, 28%, 21%
Urban Culture Dabblers: 67%, 68%, 21%, 30%, 45%, 13%, 16%
Standard Fare Partners: 70%, 51%, 16%, 18%, 35%, 4%, 13%
Social Butterflies: 42%, 47%, 33%, 20%, 31%, 11%, 14%
Comfort Seekers: 27%, 45%, 8%, 33%, 46%, 8%, 19%

- In order to gain a more complete picture of the arts consumption patterns of jazz buyers, respondents were asked to indicate their frequency of attendance a seven different types of arts programs. The chart at left reports the aggregate percentage of respondents, by segment, who reported attending each type of arts program three or more times in the past 12 months.

- Overall, Jazz-Center Omnivores reported the most frequent attendance at other types of events (hence their name), although Urban Culture Dabblers reported similarly high levels of attendance at stage plays and art museums.

- This chart also provides a good picture of the frequency of jazz attendance across the six segments. Since we were not able to tie survey results to transaction history, this indicator provides the next best thing. Jazz-Center Omnivores reported the highest frequency of attendance at jazz concerts, followed by Knowledgeable Musicians. Note the much lower frequencies associated with Social Butterflies and Comfort Seekers.

Lifetime Rates of Attendance at Types of Jazz Venues, by Segment

ATTENDANCE AT DIFFERENT VENUES, BY SEGMENT

Chart: % Respondents Who Attended, by segment and venue type:

- **Knowledgeable Musicians:** Formal concert halls 93%, Park or outdoor pavilion 88%, Clubs or lounges 83%, Restaurants 63%, Grungy dive bars 43%, Private homes 16%
- **Jazz-Centered Omnivores:** Formal concert halls 92%, Park or outdoor pavilion 78%, Clubs or lounges 96%, Restaurants 79%, Grungy dive bars 55%, Private homes 24%
- **Urban Culture Dabblers:** Formal concert halls 74%, Park or outdoor pavilion 87%, Clubs or lounges 99%, Restaurants 82%, Grungy dive bars 56%, Private homes 20%
- **Standard Fare Partners:** Formal concert halls 88%, Park or outdoor pavilion 85%, Clubs or lounges 96%, Restaurants 74%, Grungy dive bars 60%, Private homes 29%
- **Social Butterflies:** Formal concert halls 76%, Park or outdoor pavilion 97%, Clubs or lounges 99%, Restaurants 78%, Grungy dive bars 60%, Private homes 35%
- **Comfort Seekers:** Formal concert halls 69%, Park or outdoor pavilion 84%, Clubs or lounges 100%, Restaurants 77%, Grungy dive bars 55%, Private homes 20%

Legend:
- ■ Formal concert halls with chandeliers in the lobby
- ■ Park or outdoor pavilion with food booths
- ■ Clubs or lounges with small tables
- ■ Restaurants with full service menu
- ■ Grungy dive bars with sticky floors
- ■ Private homes

- The study also investigated levels of preference for different types of jazz venues. The chart at left reports the percentages of respondents in each segment who've ever attended a live jazz concert in each of the six types of venues.

- Lifetime rates of attendance at "clubs or lounges with small tables" (orange bars) are higher than those for "formal concert halls with chandeliers in the lobby" (red bars) except for Knowledgeable Musicians.

- The larger finding here is that most jazz buyers are at least somewhat familiar with a range of settings for live jazz.

- Refer to the ticket buyer summary report for more information about venue preferences by age cohort, by site, etc.

Venue Preferences – By Age Cohort

VENUE PREFERENCES BY SEGMENT
"How much would you like to see jazz in..."

Legend:
- ◆ Formal concert halls with chandeliers in the lobby
- ◆ Grungy dive bars with sticky floors
- ▲ Restaurants with full menu service
- ▲ Clubs or lounges with small tables
- ▲ Park or outdoor pavilion with food booths
- ◆ Private homes
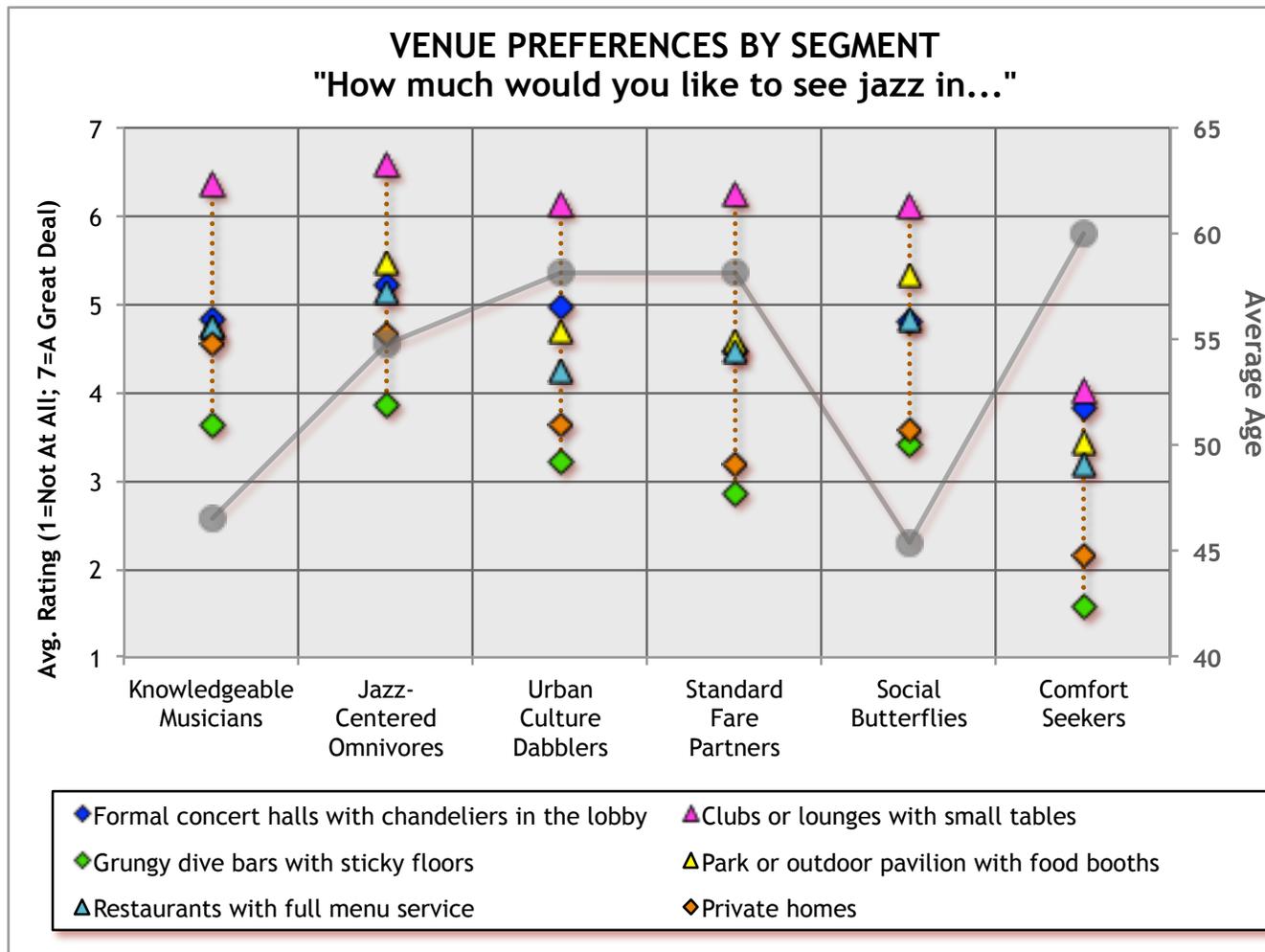
- To further explore venue preferences, respondents were asked to rate their preference for the six venue types. The chart at left compares average ratings by segment (left-hand axis).
- Average age is illustrated on the right-hand axis (grey dots), for context.
- Preference levels are highest for "clubs or lounges with small tables," by a wide margin, except for Comfort Seekers, who equally prefer club or lounges and formal concert halls. The gap is widest for Standard Fare Partners, in terms of preferring clubs or lounges.
- "Grungy dive bars with sticky floors" are least preferred by all segments.
- Social Butterflies, the youngest segment, prefer outdoor settings to formal concert halls, as do Jazz-Center Omnivores.

Relationship with Jazz

Frequency of Jazz Consumption, by Segment

PERCENT OF RESPONDENTS REPORTING WEEKLY OR DAILY INVOLVEMENT IN MUSIC ACTIVITIES, BY SEGMENT

Legend:
- Knowledgeable Musicians
- Jazz-Centered Omnivores
- Urban Culture Dabblers
- Standard Fare Partners
- Social Butterflies
- Comfort Seekers

Activity	Knowledgeable Musicians	Jazz-Centered Omnivores	Urban Culture Dabblers	Standard Fare Partners	Social Butterflies	Comfort Seekers
iPod/other digital music player/computer	74%	68%	56%	56%	44%	15%
On CDs, cassette tapes or albums	69%	81%	65%	72%	34%	23%
On the radio	63%	80%	72%	73%	48%	34%
Via streaming audio online	43%	44%	22%	31%	23%	7%
Live jazz shows	15%	27%	4%	14%	4%	3%

- Respondents were asked how often they listen to jazz via different media, as well as through live performance. The answer options were: never, seldom, monthly, weekly, and daily. The chart at left illustrates the aggregate percentages of respondents who reported "daily" or "weekly" frequency for each mode of consumption.

- Radio is the dominant mode of consumption for all six segments, with the exception that Jazz-Centered Omnivores and Standard Fare Partners are equally likely to listen to jazz on physical media (81% and 72%, respectively).

- Listening to jazz via streaming audio is strongly associated with the two segments with the highest knowledge levels about jazz.

- Again, these are the percentages of respondents who reported "weekly" or "daily" involvement in jazz consumption via different media. The overall picture here is that jazz is present in their lives through radio, digital music players, and physical media. In between live performances, this is how ticket buyers sustain their interest in the form.

  – Results argue strongly for jazz presenters' involvement in promoting jazz consumption through recordings and media.

Jazz as a Proportion of Music Collection

PERCENTAGE OF JAZZ AS PART OF MUSIC COLLECTION, BY SEGMENT

Legend: ☐ Less than 50% ☐ 50% ■ 50% or more

Segment	50% or more	50%	Less than 50%
Knowledgeable Musicians	40%	15%	45%
Jazz-Centered Omnivores	56%	12%	32%
Urban Culture Dabblers	39%	12%	49%
Standard Fare Partners	48%	15%	37%
Social Butterflies	7%	6%	87%
Comfort Seekers	5%	4%	91%
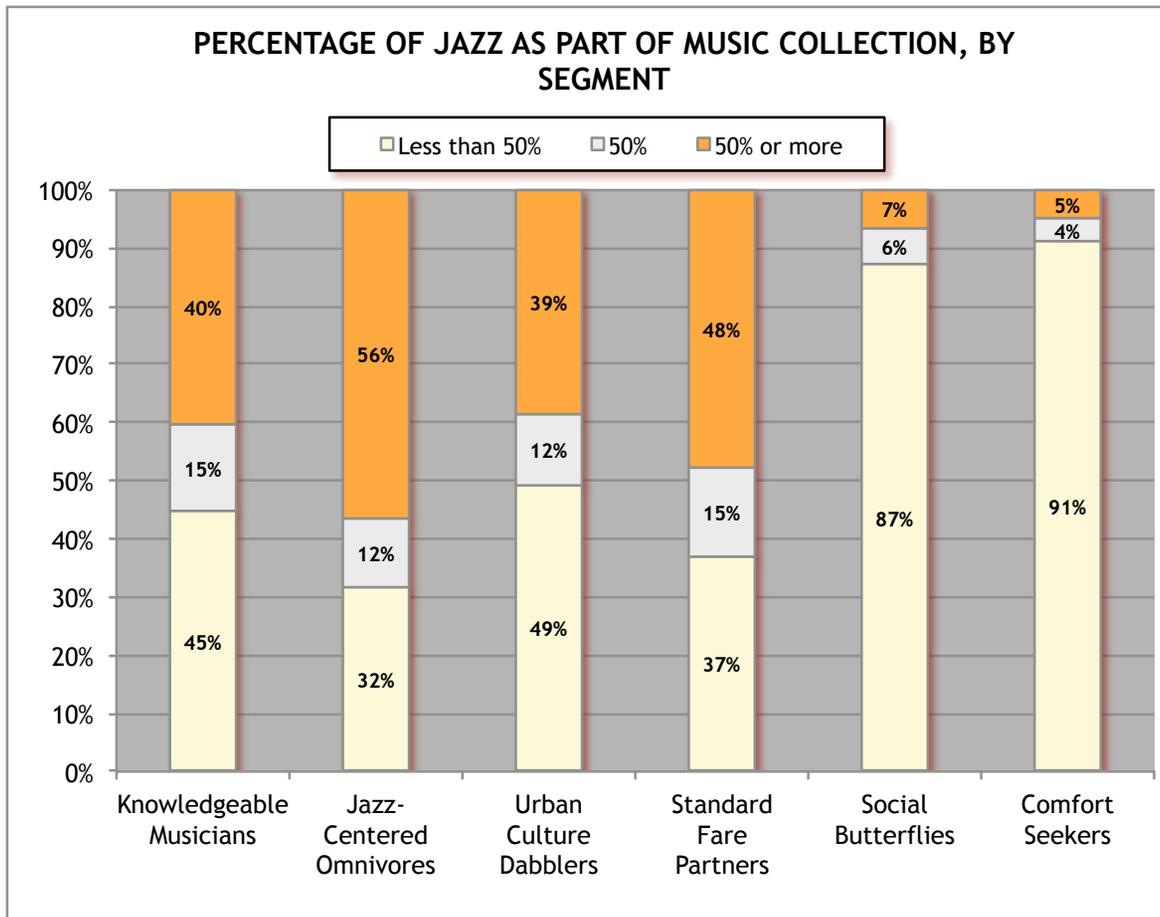
- Another indicator of an individual's relationship with the art form is ownership of jazz recordings. Respondents were asked to estimate the proportion of jazz recordings in relation to their total music collection, and were also asked the proportion of new music acquisitions accounted for by jazz recordings (not shown; similar results to this page).

- Jazz-Center Omnivores and Standard Fare Partners reported the highest proportions of jazz in their personal music collections; 56% and 48%, respectively, said that jazz accounts for half or more of their music collection.

- In fact, four out of six segments reported that jazz accounts for a significant portion of their record collection. In contrast, jazz accounts for a smaller proportion of the music collections of Social Butterflies and Comfort Seekers.

  – Is this an opportunity? In other words, can jazz presenters, through the distribution of recordings, begin to influence their tastes, if they are already coming to live performances?

Interest and Knowledge Level, by Segment

KNOWLEDGE LEVEL VS. LEVEL OF INTEREST IN LEARNING MORE, BY SEGMENT
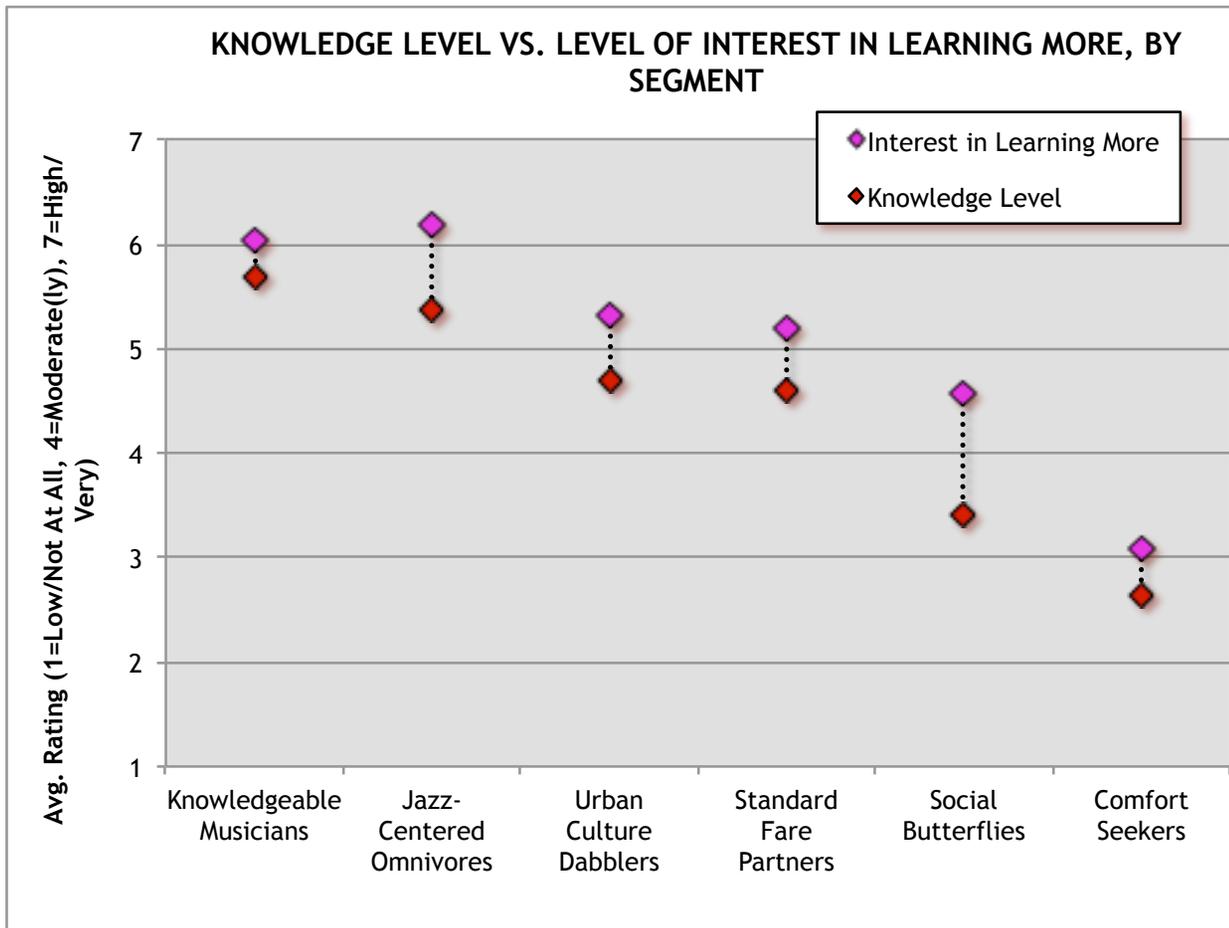
- As an indicator of their relationship with the art form, respondents were asked to self-report their level of knowledge about jazz, and their level of interest in learning more about jazz.

- Results illustrate the diversity of the six segments with respect to knowledge level.

- While Knowledgeable Musicians report the highest knowledge levels, Jazz-Centered Omnivores reported the highest interest in learning more about jazz.

- Even Social Butterflies reported a strong interest in learning more about jazz, compared to their current knowledge level.

  – What are the implications of this finding for copy-writing (i.e., level of difficulty, use of vocabulary)?

Interest in Doing Jazz Activities More Often in the Future, by Partner

"IN THE FUTURE, HOW OFTEN WOULD YOU LIKE TO....?" (% who would like to do "more than they do now")

Legend:
- Knowledgeable Musicians
- Jazz-Centered Omnivores
- Urban Culture Dabblers
- Standard Fare Partners
- Social Butterflies
- Comfort Seekers

Go to live jazz shows: 81%, 81%, 79%, 79%, 76%, 42%
Play jazz music on my own or with a group: 71%, 30%, 20%, 18%, 22%, 6%
Listen to jazz recordings: 54%, 59%, 46%, 50%, 48%, 26%
Take a class about jazz or jazz history: 43%, 56%, 40%, 38%, 39%, 19%
Learn about jazz on the web: 40%, 48%, 35%, 34%, 29%, 12%

- In order to gain a sense of aspirational involvement in jazz, respondents were asked how often they would like to do five different jazz activities in the future. The answer options were: less than now, same as now, more than now. The chart at left reports the percentages of respondents who answered "more than now," by segment.

- Roughly 80% of all segments want to go to live jazz performances more than they do now, except for Comfort Seekers (42%).

- As would be expected, Knowledgeable Musicians are far more likely to want to "play jazz music on my own or with a group" (71% more likely than now).

- It surprised us that so many respondents indicated that they'd like to "take a class about jazz or jazz history" (56% of Jazz-Centered Omnivores).
  - How can jazz presenters nationally collaborate on a jazz appreciation course for enthusiastic ticket buyers?

Jazz Preferences

Desired Outcomes

"I PREFER JAZZ THAT..." BY SEGMENT

- Knowledgeable Musicians
- Jazz-Centered Omnivores
- Urban Culture Dabblers
- Standard Fare Partners
- Social Butterflies
- Comfort Seekers

	Makes me think or challenges me in some way	Makes me tap my toes and want to dance	Tugs on my heartstrings	Takes me back to another time or place	I can sing or hum along to
Knowledgeable Musicians	66%	14%	11%	5%	4%
Jazz-Centered Omnivores	46%	22%	14%	14%	4%
Urban Culture Dabblers	44%	21%	9%	21%	6%
Standard Fare Partners	32%	30%	12%	16%	9%
Social Butterflies	16%	48%	10%	18%	8%
Comfort Seekers	10%	38%	14%	25%	12%

- Another focus of the survey was preferences in relation to jazz music. It is often difficult for consumers to describe the types of music they like. A qualitative study conducted in advance of this survey concluded that listeners were unable to identify different jazz genres, and had difficulty even describing what they liked or didn't like about different music tracks.

- In an effort to ascertain what outcomes or benefits people want from jazz listening, respondents were asked to complete the following sentence: "I prefer jazz that…" with the options listed in the chart at left. Results are cross-tabulated by gender.

Overall Familiarity with Artists
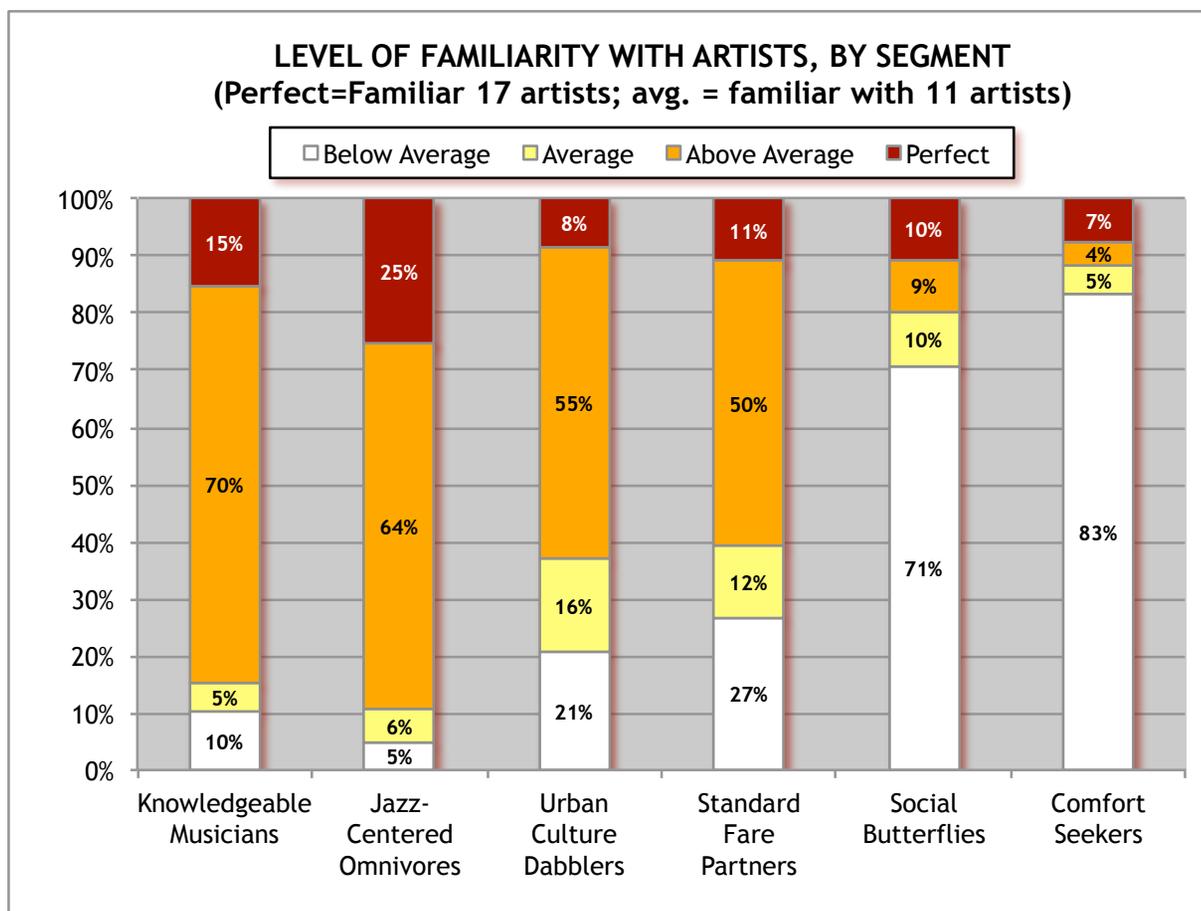
LEVEL OF FAMILIARITY WITH ARTISTS, BY SEGMENT
(Perfect=Familiar 17 artists; avg. = familiar with 11 artists)

Legend: ☐ Below Average ☐ Average ■ Above Average ■ Perfect

Segment	Below Average	Average	Above Average	Perfect
Knowledgeable Musicians	10%	5%	70%	15%
Jazz-Centered Omnivores	5%	6%	64%	25%
Urban Culture Dabblers	21%	16%	55%	8%
Standard Fare Partners	27%	12%	50%	11%
Social Butterflies	71%	10%	9%	10%
Comfort Seekers	83%	5%	4%	7%

- In order to get a more nuanced understanding of jazz preferences, respondents were asked how much they like particular jazz artists that represent different styles of jazz. If a respondent was unfamiliar with the artist, they were asked to mark "don't know" and move to the next artist on the list. The option to "opt-out" of responding allowed us to examine the level of familiarity with each artist, independent of preference, and hence provide a secondary indicator of knowledge level.

- The chart at left illustrates familiarity levels for all artists (in aggregate), by segment. "Perfect" familiarity occurs when a respondent is familiar with all 17 of the listed artists.

- As stated at the beginning of the report, knowledge and experience dictates the ordering of the segments from left to right. It is clear that familiarity with artists follows this pattern (i.e., overall familiarity decreases from left to right across segments).

- Note that Jazz-Centered Omnivores are more likely to be familiar with all 17 artists (25%). This is not surprising given their strong patterns of jazz consumption, both attending live shows and listening to their own collection.

Preferences for Jazz Artists

AVERAGE PREFERENCES AND FAMILIARITY LEVELS FOR JAZZ ARTISTS, KNOWLEDGEABLE MUSICIANS

Chart legend: ■ Knowledgeable Musicians (% familiar) ● Knowledgeable Musicians (avg. rating)

Y-axis (left): Average rating (1=Not at all; 7=A great deal)
Y-axis (right): 0% to 100%

Familiarity percentages by artist:
- Charlie Parker: 90%
- Stan Getz: 72%
- Pat Metheny: 92%
- Roy Hargrove: 76%
- Ornette Coleman: 75%
- Preservation Hall Band: 88%
- Diana Krall: 96%
- Antonio Carlos Jobim: 91%
- Robert Glasper: 56%
- Keith Jarrett: 93%
- Hugh Masakela: 74%
- Lionel Loueke: 60%
- Poncho Sanchez: 64%
- Jamiroquai: 73%
- John Zorn: 40%
- B.B. King: 98%
- Kenny G: 93%

Categories: Standards and Masters | Eclectic and World | Pop Crossover Artists

- In order to get a more nuanced understanding of jazz preferences, respondents were asked how much they like particular jazz artists that represent different styles of jazz (on a scale of 1 to 7). If a respondent was unfamiliar with the artist, they were asked to mark "don't know" and move to the next artist on the list.

- The chart at left illustrates results for the Knowledgeable Musicians segment (14% of all buyers). The columns indicate the percentage who are familiar with the artist (right-hand scale), while the dots indicate the average interest rating for each artist, amongst those who provided a rating (left-hand scale). The artists are sorted from high to low ratings within each of the three categories.

- Knowledgeable Musicians' interest ratings are all above average, except for Diana Krall, John Zorn and Kenny G. They are most likely to enjoy the music of Charlie Parker and Antonio Carlos Jobim.

- While only 56% of them have heard of Robert Glasper, those who have give him a high interest rating (about the same as B.B. King).

Preferences for Jazz Artists

AVERAGE PREFERENCES AND FAMILIARITY LEVELS FOR JAZZ ARTISTS, JAZZ-CENTERED OMNIVORES

Legend: ■ Jazz-Centered Omnivores (% familiar) ● Jazz-Centered Omnivores (avg. rating)

Average rating (1=Not at all; 7=A great deal)

Familiarity percentages by artist:
- Charlie Parker: 99%
- Stan Getz: 97%
- Roy Hargrove: 94%
- Pat Metheny: 97%
- Ornette Coleman: 89%
- Diana Krall: 98%
- Preservation Hall Band: 95%
- Antonio Carlos Jobim: 88%
- Keith Jarrett: 96%
- Poncho Sanchez: 89%
- Hugh Masakela: 90%
- Robert Glasper: 55%
- Lionel Loueke: 56%
- John Zorn: 64%
- Jamiroquai: 60%
- B.B. King: 100%
- Kenny G: 97%

Groupings: Standards and Masters | Eclectic and World | Pop Crossover Artists

- As their name implies, Jazz-Centered Omnivores have broad tastes in jazz. On average, they have above-average preferences for all of the artists tested, except for Kenny G.

- They are more likely than Knowledgeable Musicians to know of John Zorn (64% vs. 40%, respectively), and more likely to like his music (average ratings of 4.6 vs. 3.8, respectively).

- Note the almost perfect familiarity and preference scores for Charlie Parker.

Preferences for Jazz Artists

AVERAGE PREFERENCES AND FAMILIARITY LEVELS FOR JAZZ ARTISTS, URBAN CULTURE DABBLERS
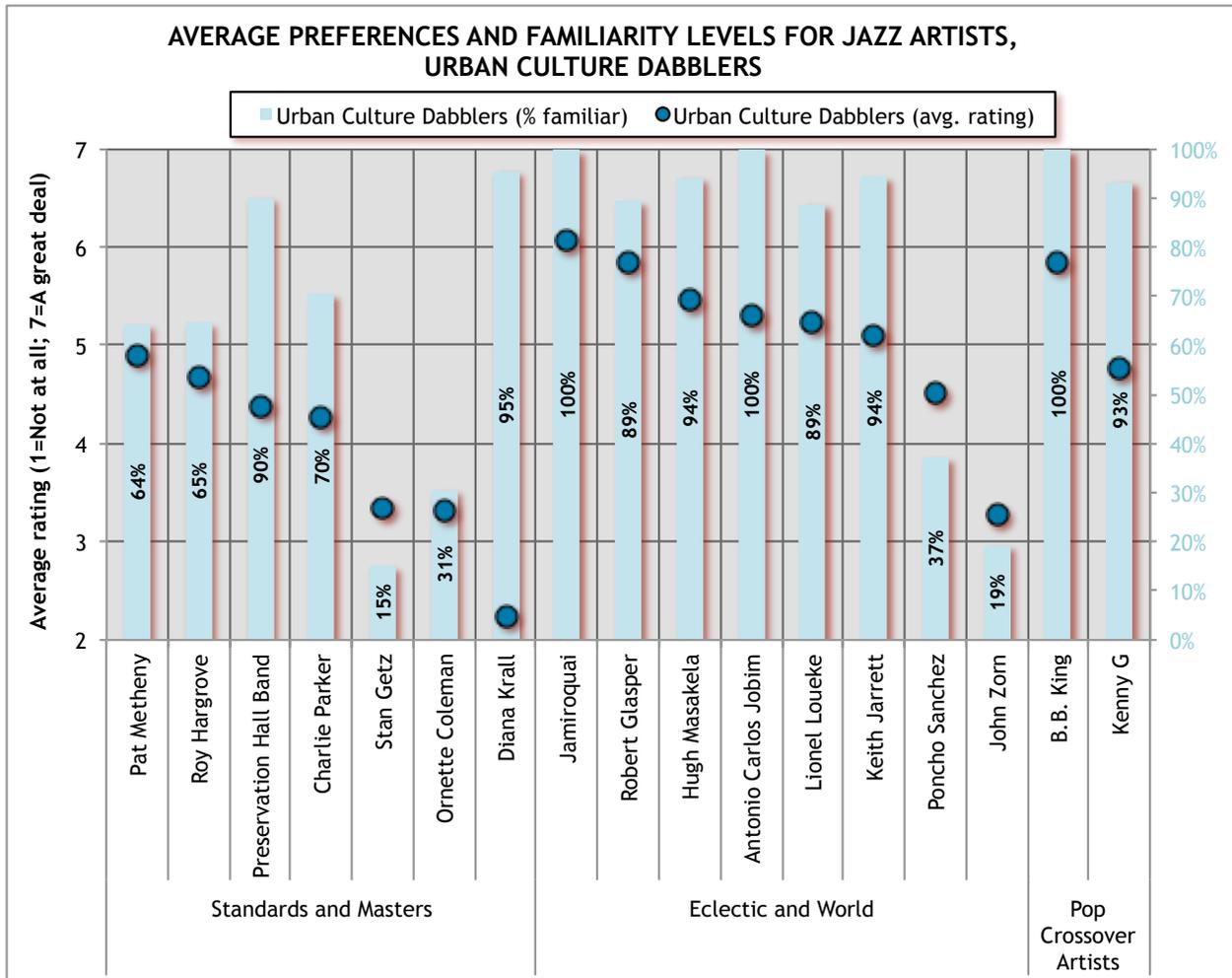
- Urban Culture Dabblers have very different tastes than Jazz-Centered Omnivores. Their highest preference is for Jamiroquai (for whom they have 100% awareness), Robert Glasper, and B.B. King. Eclectic and world artists are their first love.
  - It is unclear to us why this older skewing segment would have such high preference for Jamiroquai, typically an artist that attracts younger audiences.

- They exhibit much lower preferences for some of the jazz masters like Stan Getz, and especially dislike Diana Krall. Interestingly, they are much more interested in Kenny G. than either of the two preceding segments.

- It seems shocking, somehow, that only 15% of them have ever heard of Stan Getz.

Preferences for Jazz Artists

AVERAGE PREFERENCES AND FAMILIARITY LEVELS FOR JAZZ ARTISTS, STANDARD FARE PARTNERS

Legend: Standard Fare Partners (% familiar) · Standard Fare Partners (avg. rating)

Y-axis (left): Average rating (1=Not at all; 7=A great deal)
Y-axis (right): 0% – 100%

Artist	% familiar
Stan Getz	97%
Charlie Parker	99%
Diana Krall	97%
Roy Hargrove	75%
Pat Metheny	94%
Ornette Coleman	78%
Preservation Hall Band	86%
Antonio Carlos Jobim	72%
Keith Jarrett	85%
Poncho Sanchez	68%
Hugh Masakela	69%
Jamiroquai	30%
John Zorn	27%
Robert Glasper	21%
Lionel Loueke	23%
B.B. King	99%
Kenny G	97%

Groupings: Standards and Masters · Eclectic and World · Pop Crossover Artists

- Standard Fare Partners reported strong preference levels for most of the jazz masters on the artist list, especially Stan Getz, Charlie Parker and Diana Krall. They also enjoy the music of Antonio Carlos Jobim and B.B. King.
- They are much less likely to like the music of several of the eclectic and world artists on the list, including Jamiroquai, John Zorn, Robert Glasper and Lionel Loueke, for whom they have both low awareness and low preference.

Preferences for Jazz Artists

AVERAGE PREFERENCES AND FAMILIARITY LEVELS FOR JAZZ ARTISTS, SOCIAL BUTTERFLIES

Legend: ■ Social Butterflies (% familiar) ● Social Butterflies (avg rating)

Y-axis (left): Average rating (1=Not at all; 7=A great deal)
Y-axis (right): 0% – 100%

Artists and % familiar:
- Charlie Parker — 61%
- Stan Getz — 43%
- Preservation Hall Band — 55%
- Pat Metheny — 47%
- Roy Hargrove — 35%
- Diana Krall — 87%
- Ornette Coleman — 40%
- Antonio Carlos Jobim — 62%
- Jamiroquai — 64%
- Keith Jarrett — 63%
- Poncho Sanchez — 30%
- Hugh Masakela — 37%
- Robert Glasper — 23%
- Lionel Loueke — 23%
- John Zorn — 13%
- B.B. King — 93%
- Kenny G — 82%

Groups: Standards and Masters | Eclectic and World | Pop Crossover Artists

- Awareness levels decline significantly for Social Butterflies, except for Diana Krall (who they know, but do not like) and B.B. King (who they like). Aside from B.B. King, their top-rated artist is Antonio Carlos Jobim.

- Increasing awareness levels is implied as a first-level challenge with this group. They could use a basic education in jazz history.

Preferences for Jazz Artists

AVERAGE PREFERENCES AND FAMILIARITY LEVELS FOR JAZZ ARTISTS, COMFORT SEEKERS

Legend: ■ Comfort Seekers (% familiar) ● Comfort Seekers (avg. rating)

Y-axis (left): Average rating (1=Not at all; 7=A great deal)
Y-axis (right): 0% – 100%

Familiarity percentages:
- Charlie Parker — 42%
- Preservation Hall Band — 43%
- Diana Krall — 73%
- Stan Getz — 26%
- Pat Metheny — 27%
- Roy Hargrove — 21%
- Ornette Coleman — 23%
- Antonio Carlos Jobim — 66%
- Keith Jarrett — 52%
- Jamiroquai — 51%
- Robert Glasper — 28%
- Hugh Masakela — 31%
- Lionel Loueke — 22%
- Poncho Sanchez — 19%
- John Zorn — 11%
- B.B. King — 76%
- Kenny G — 71%

Category groupings: Standards and Masters | Eclectic and World | Pop Crossover Artists

- Comfort Seekers know of some of the more well known artists like B.B. King and Kenny G., who they like. They also enjoy the music of Antonio Carlos Jobim, Keith Jarrett and Jamiroquai, although only half of them have heard of these artists.

- Given their low familiarity levels and moderate to low preference levels, we are hesitant to call these people jazz lovers. While they are certainly coming to jazz concerts, their motivations appear to be something besides jazz. Or, the list of artists provided does not reflect their musical interests.

# Core Values, Initiator/ Responder Status, and Technology Use

Prevalence of Initiators and Responders

INCIDENCE OF INITIATORS AND RESPONDERS, BY SEGMENT

Legend:
- Initiators (Agreement rating of 6 or 7)
- Responders (Agreement rating of 6 or 7)

Segment	Initiators	Responders
Knowledgeable Musicians	24%	27%
Jazz-Centered Omnivores	44%	24%
Urban Culture Dabblers	21%	21%
Standard Fare Partners	16%	21%
Social Butterflies	25%	30%
Comfort Seekers	8%	17%
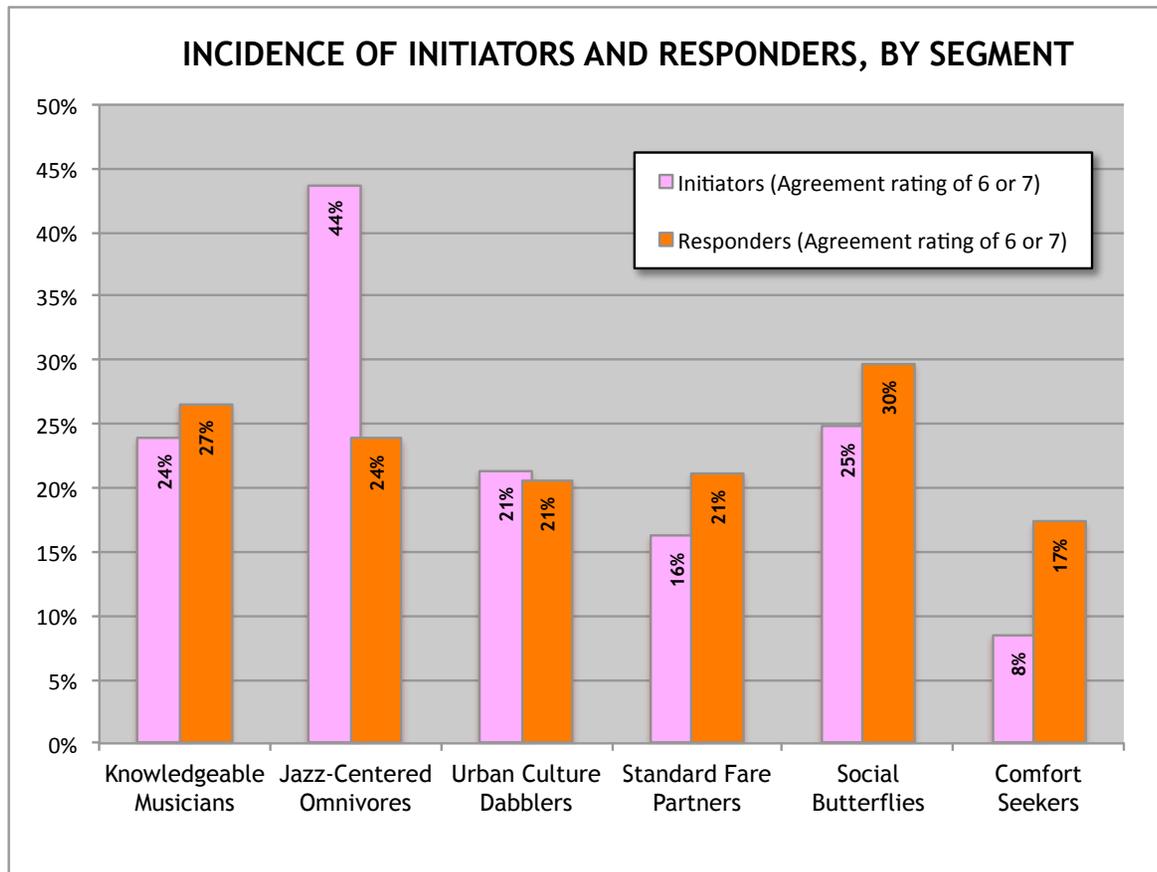
- To gain a clearer picture of the representation of Initiators and Responders amongst the six segments, the percentage of respondents who strongly associate with each statement was calculated (i.e., answered 6 or 7 on an scale of 1 (no association) to 7 (strong association).

- Jazz-Centered Omnivores are much more likely than other segments to be Initiators (44%), which makes sense given their devotion to the art form, and their likelihood to be single (not married or partnered).

- Its interesting that Knowledgeable Musicians and Social Butterflies are most likely to be Responders, which probably relates to their younger age and higher likelihood of being single.

- Comfort Seekers are least likely of all segments to be either Initiators or Responders, but are twice as likely to be Responders.

Value Associations

VALUE ASSOCIATIONS, BY SEGMENT
"How much do you think about..."

Legend:
- Discovering new artists and new works of art
- Learning about a broad range of cultures around the world
- Having a spiritual life
- Being involved in social, environmental or political causes
- Making new friends and expanding your social network
- Exploring and celebrating your own cultural heritage

Y-axis: Avg. Rating (1=Never; 7=Frequently)

X-axis segments: Knowledgeable Musicians, Jazz-Centered Omnivores, Urban Culture Dabblers, Standard Fare Partners, Social Butterflies, Comfort Seekers

- In order to gain a more general sense of their underlying values, respondents were asked how often they think about six different things.

- Jazz-Center Omnivores associate highly with "discovering new artists and new works of arts," and with "learning about a broad range of cultures around the world," but also with the other values. They are most likely to associate with "exploring and celebrating your own cultural heritage," which is consistent with their more diverse ethnic backgrounds.

- It is interesting to note that Social Butterflies reported strong value associations in general (and were highest for "being involved in social, environmental or political causes," suggesting an entry point for this elusive segment.

Use of Technology, by Segment

PERCENT REPORTING "REGULAR" USE OF TECHNOLOGIES, BY SEGMENT

Segment	Watch videos online	Listen to streaming audio	Use online social networking sites	Read blogs	Use mobile apps	Listen to Podcasts
Knowledgeable Musicians	73%	60%	58%	40%	31%	25%
Jazz-Centered Omnivores	50%	58%	47%	31%	31%	27%
Urban Culture Dabblers	35%	41%	34%	18%	22%	20%
Standard Fare Partners	34%	50%	33%	24%	23%	19%
Social Butterflies	46%	56%	54%	30%	36%	22%
Comfort Seekers	25%	26%	26%	16%	15%	13%

Legend:
- ■ (red) Watch videos online
- ■ (purple) Listen to streaming audio on the Internet
- ■ (green) Use online social networking sites
- ■ (blue) Read blogs or contribute to blogs
- ■ (yellow) Use mobile apps on a cell phone
- ■ (orange) Listen to Podcasts

- Respondents were asked if they "regularly" do six different technology-based activities (e.g., online and cell phone use), in order to assess their overall adoption of technologies often used to deliver cultural content. Multiple responses were allowed. The chart at left shows results by segment.
- As expected, the two younger leaning segments, Knowledgeable Musicians and Social Butterflies, are most likely to use a range of technology tools as part of their regular activity. Jazz-Centered Omnivores are also highly active in these types of activities.
- In particular, Knowledgeable Musicians and Social Butterflies, are highly involved in social networking sites (58% and 54%, respectively).
- Note the relatively high prevalence of "listen to streaming audio on the Internet" across all segments (26% to 60% of respondents).
  – How can jazz presenters tap into this pervasive use of online media to increase knowledge of artists and programming?

Use of Technology, by Sample

STANDARDIZED WIRED SCORE BY SEGMENT
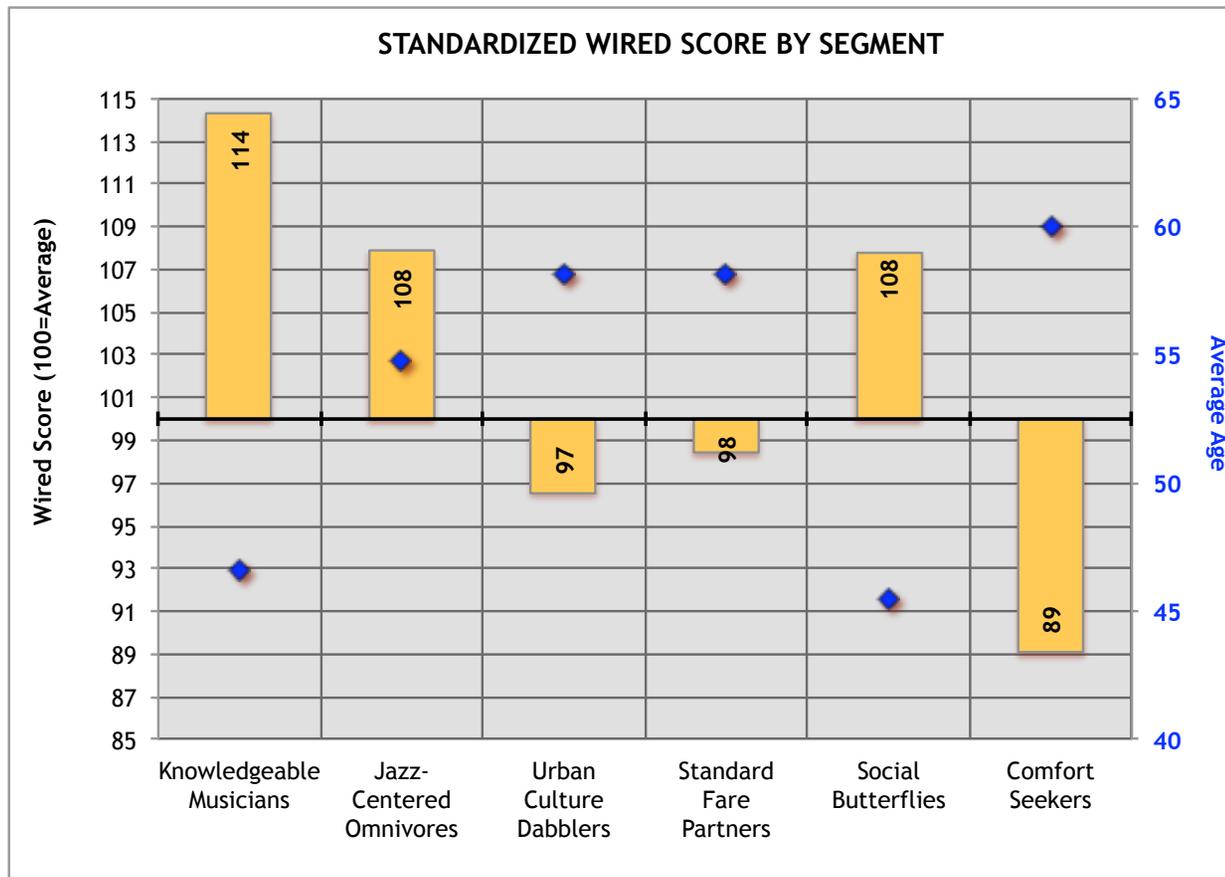
- In order to facilitate further analysis, results for the six technology-based activities were rolled up into a single "wired score," which was then standardized into an index (100 = average). The chart at left illustrates the standardized "wired score" across the six segments, along with average age.

- Once again, a negative association is evident with respect to older-skewing segments and technology use. Knowledgeable Musician are most wired, followed by Jazz-Centered Omnivores and Social Butterflies.

Appendix 1: Survey Protocol