



Regenerating the Jazz Audience: Results from a Multi-Site Survey of Jazz Ticket Buyers and Prospects

Jazz Audiences Initiative
Research commissioned by Jazz Arts Group
with support from the Doris Duke Charitable Foundation, the
Ohio Arts Council and the Greater Columbus Arts Council

February 2011

Contents

3-5	Key Observations
6-7	Survey Methodology and Response
8-9	Demographics
10-11	Professional Artist Status
12-23	Relationship to Music
24-32	Purchase Decision Factors, Attendance Patterns and Venue Preferences
33-41	Relationship to Jazz
42-58	Jazz Preferences
59-67	Core Values, Initiator/Responder Status, and Technology Use
68	Appendix 1: Select Individual Partner Charts
88	Appendix 2: Survey Protocol



Key Observations

- While the seven samples of jazz buyers investigated in this study do not constitute a representative sample of all jazz audiences nationwide, they do represent a diverse cross section of jazz presenters and markets. Bear in mind that this study is limited to jazz buyers (i.e., the people who buy tickets, not the people who come with them).
- Demographically, jazz buyers across the seven sites are middle-aged, predominantly male, and very well educated. On average, only 17% are under age 45, and 80% are white.
- Younger buyers are significantly different than older buyers, suggesting generational shifts in participation patterns and preferences.
 - Younger buyers are more actively involved in the full range of music activities, especially downloading and organizing music. Engaging them will require a multi-pronged strategy involving both live and digital experiences, and both participatory and observational activities.
- A majority of ticket buyers across all seven sites (54%) indicated that they would like to play a musical instrument in the future. The figures are highest for younger patrons ages 18-34 (72%).
- A third of respondents across the seven sites would like to “study music history or music appreciation,” a surprisingly strong indication of interest in the form.
- Jazz buyers learn about unfamiliar artists on the radio (presumably both AM/FM radio and Internet radio), and through recommendations from friends or family members (i.e., word of mouth). This corroborates findings from the music listening study suggesting that “taste is socially transmitted” (i.e., friends introduce friends to new music).
- As evidenced by the proportion of jazz recordings in their music collections – a smaller proportion of their overall collection is dedicated to jazz - younger buyers exhibit categorically more eclectic music tastes than their older counterparts.
 - What does this portend for institutions defined around a specific form of music?



Key Observations - Continued

- In considering attending live jazz shows, the artist is the driving decision factor. Cost is a secondary factor amongst younger buyers, especially those with limited experience with jazz. Efforts to engage a new, less knowledgeable audience must deal with the cost barrier.
- There is reason to be hopeful. Approximately 70% to 80% of jazz buyers across the seven sites aspire to attend more jazz shows than they do now. A key question for the field is how activate this interest.
- Jazz buyers want to move, suggesting a strong kinetic association. When asked what kind of jazz they like, a third of all buyers indicated they like jazz that... ‘makes me want to tap my toes and dance,’ while 31% said they like jazz that... ‘makes me think or challenges me in some way.’ Women are very different from men in this respect, with women prioritizing jazz that makes them want to move, and men prioritizing jazz that makes them think. Older buyers 65+ prioritize the sentimental aspects of jazz... ‘that takes me back to another time or place.’
- By a wide margin, jazz buyers prefer informal settings for live jazz shows, especially clubs and lounges. Younger buyers have an especially strong affinity for informal settings. Prospects are equally likely to prefer outdoor settings to club settings.
 - This has significant long-term implications for audience development. Clubs and outdoor settings are appealing “portals” into jazz for younger music lovers. These are settings where people can move around, drink and socialize. Many nonprofit jazz presenters, however, focus their presenting on jazz artists with larger followings, which in turn require larger venues that often do not allow for the experience that many consumers idealize. How can this cycle be broken? What will motivate jazz presenters to explore alternative settings for jazz in their communities? Is this strictly an economic dilemma, or are other factors at play?
- Preferences for specific jazz artists vary significantly by age and ethnicity. However, preferences for specific artists are clearly influenced by the programming choices made by the seven partners. Overall, results point to the pivotal role that jazz curators (i.e., programming directors) play in evolving preferences and tastes. Audiences respond to artists in a symbiotic process of aesthetic development. The more knowledgeable they become, the more live jazz they want to hear. Ultimately, the audience is a reflection of what’s on stage, which is not to diminish the influence of price, venue and other factors on the audience.



Key Observations - Continued

- An exploratory factor analysis of artist preferences reveals three underlying dimensions of preference: 1) Eclectic and World – a combination of youth-leaning cross-genre artists like John Zorn and Jamiroquai; 2) Standards and Masters – artists that in many ways represent the “canon” of jazz masters (e.g., Charlie Parker, Stan Getz); and 3) Pop Crossover – artists that have, over time, grown to appeal to a broad mainstream and pop-based audience (e.g., B.B. King).
– These findings may have implications for how jazz programming is packaged and promoted.
- Of six value associations tested, two are dominant across all age cohorts: ‘discovering new artists and new works of art,’ and ‘learning about a broad range of cultures around the world.’ Both of these values relate closely to mission-driven jazz programming, and suggest an appetite for learning about the music of other cultures, especially amongst younger buyers.
- Results illustrate the generational shift in technology use amongst younger music consumers. Three quarters of all buyers in the 18-35 cohort use social networking websites, and 68% stream audio from the Internet. Jazz presenters who do not concern themselves with digital listening experiences will never be able to fully relate to younger audiences.
- In sum, results point to dramatic differences in the music consumption patterns of older and younger jazz patrons. Presenting live concerts is not sufficient as a lone strategy for rebuilding the jazz audience. Jazz presenters must see themselves as players in a larger ecology of rapidly shifting musical tastes in which aesthetic development is the primary outcome, not just buying a ticket.



Survey Methodology and Response

- The ticket buyer survey protocol was designed in tandem with the prospect survey, 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 and 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 un-weighted data. Biases are mostly internal to each partner's list (e.g., bias from respondent self-selection). For the purposes of analysis and reporting, we assume these biases to be equal.
- Some results in this report refer to the "Prospect" sample, a separate data collection effort. These are to provide additional context to the ticket buyer results. A supplemental report on the Prospect research will be appended to this report.



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 (Monterey, 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%
<i>Sub-Total, Six Partners</i>	<i>34,614</i>	<i>30,613</i>	<i>2,863</i>	<i>9%</i>	<i>10,661</i>	<i>1,201</i>	<i>11%</i>	<i>4,064</i>	<i>12%</i>

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%
<i>Sub-Total, All MUP Responses</i>	<i>3,000</i>	<i>2,167</i>	<i>369</i>	<i>17%</i>	<i>2,716</i>	<i>422</i>	<i>16%</i>	<i>791</i>	<i>26%</i>



Demographic Characteristics, by Partner

DEMOGRAPHICS BY PARTNER (UNWEIGHTED DATA)	Total	Jazz Arts Group	Jazz at Lincoln Center	Jazz at St. Louis	SFJAZZ	Monterey Jazz Festival	Sculler's Jazz Club	MUP Consortium
Sample size (unweighted)	4,855	866	414	446	345	950	1043	791
Gender								
Female	46%	52%	48%	37%	40%	37%	53%	50%
Male	54%	48%	52%	63%	60%	63%	47%	50%
Age								
18-34	7%	5%	7%	11%	13%	2%	6%	13%
35-44	10%	9%	13%	15%	16%	6%	11%	9%
45-54	25%	18%	24%	23%	26%	22%	38%	18%
55-64	35%	37%	31%	32%	28%	41%	37%	32%
65+	23%	31%	26%	20%	17%	29%	8%	29%
Race								
White/Caucasian	79%	93%	80%	75%	73%	66%	78%	83%
Not-White	21%	7%	20%	25%	27%	34%	22%	17%
Educational Attainment								
High school graduate or G.E.D.	3%	3%	1%	2%	2%	2%	4%	2%
Some college, no degree	12%	8%	6%	12%	9%	16%	18%	7%
Associate or Vocational Degree	6%	4%	2%	6%	4%	8%	10%	3%
Bachelor's Degree	32%	38%	26%	34%	35%	31%	35%	25%
Master's Degree	30%	31%	38%	31%	29%	28%	24%	33%
Professional Degree	17%	16%	27%	15%	22%	14%	8%	29%
Work Status (multiple responses allowed)								
Working full-time	57%	48%	57%	64%	61%	52%	68%	49%
Working part-time	12%	13%	11%	10%	11%	14%	11%	13%
In school full-time	2%	1%	2%	3%	2%	1%	1%	6%
Not employed	4%	3%	3%	2%	5%	3%	6%	2%
Full-time Family Caregiver	2%	2%	3%	3%	1%	1%	2%	2%
Retired	26%	36%	25%	22%	21%	31%	13%	30%
Marital Status								
Married or partnered	71%	78%	73%	70%	61%	74%	74%	71%
Not married or partnered	29%	22%	27%	30%	39%	26%	26%	29%
Avg. # of Children Under 18								
Avg. # Children	0.26	0.18	0.35	0.37	0.25	0.18	0.34	0.25

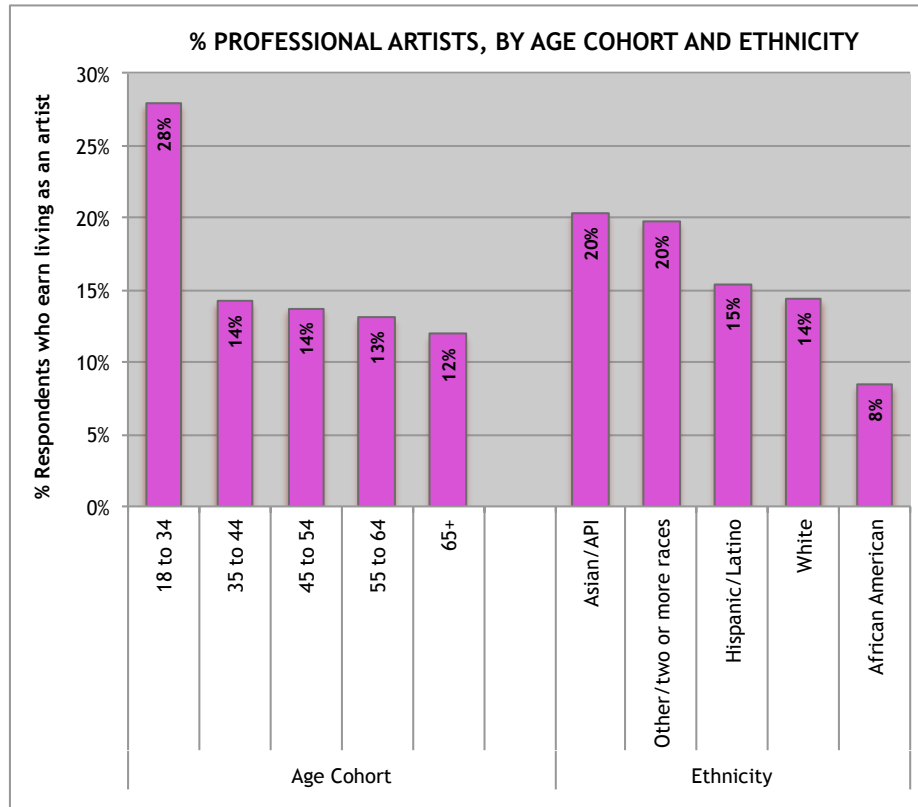


Demographic Characteristics - Key Observations

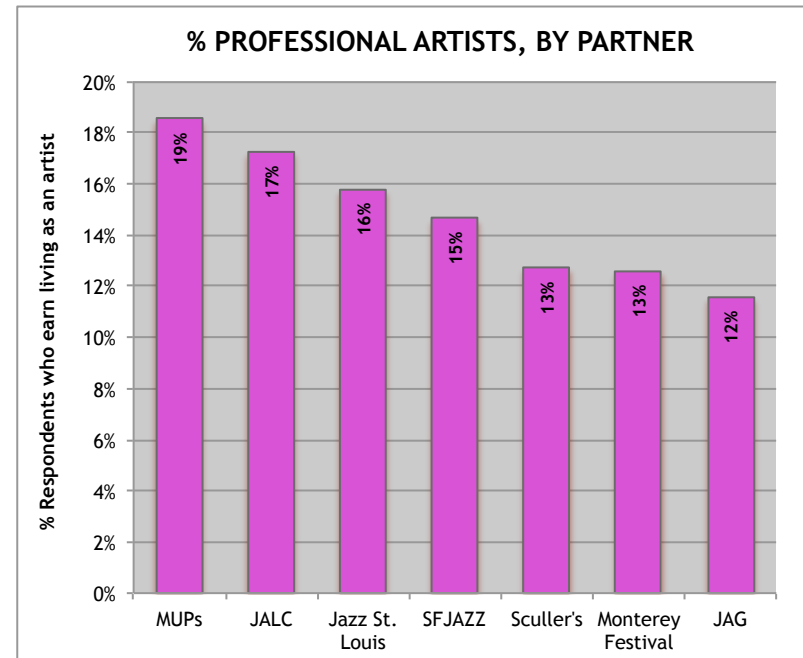
- Overall, the majority of the sample skews male (54% to 46%). This is a unique characteristic of jazz audiences, compared to other types of arts audiences. Jazz St. Louis, Monterey Jazz Festival and SFJAZZ ticket buyers are most likely to be male.
- The average age of all ticket buyer respondents (aggregated across the seven samples, weighted for list size) is 54. This compares to an average age of 47 for the Prospect sample.
- The National Endowment for the Arts' Survey of Public Participation in the Arts (SPPA) provides longitudinal context. According to the Wall Street Journal, the median age of adults in America who attended a live jazz performance in 2008 was 46. In 1982 it was 29. (source: "Can Jazz Be Saved? The audience for America's great art form is withering away," by Terry Teachout, August 9, 2009)
 - What explains the difference between the average age of jazz attenders from the SPPA (47) and the average age of jazz ticket buyers from our study (54)? The SPPA includes all types of jazz events, free or ticketed, whereas our study includes only ticket buyers at a range of professionally-presented events.
- For the aggregated online samples, the average age is 53.8, which compares to 55.5 for the mail samples (i.e., online respondents are younger, on average, by 1.7 years, illustrating a weak but statistically significant skew associated with online surveying).
- In aggregate, only 17% of all jazz ticket buyers are under age 45. The majority of jazz buyers (six in ten) are between 45 and 64. While the seven samples of ticket buyers surveyed in this study are not representative of all jazz audiences, one might reasonably assert that live jazz, on the whole, is not reaching younger audiences. There are exceptions, of course. On average, SFJAZZ and Jazz at St. Louis ticket buyers are significantly younger (29% and 26%, respectively, under 45). Both of these organizations focus extensively on programming artists that appeal to younger audiences.
- Similar to most arts audiences, jazz buyers are highly educated (47% with graduate degree). Not surprisingly, Major University Presenters (MUP) buyers have the highest educational attainment levels (29% with a professional degree) which compares to 27% for Jazz at Lincoln Center and 22% for SFJAZZ.
 - Live jazz is definitely not the democratic art form that it once was. It is primarily for the well-educated.
- On average, 21% of all buyers in the sample self-identified as a race or ethnicity other than White/Not Hispanic. The highest amount of racial/ethnic diversity was reported by Monterey Jazz Festival buyers (34%), followed by SFJAZZ (27%)
- On average, about one-quarter of respondents are retired, and another 57% work full-time. The differences in work status between the partner organizations follow age patterns, as do the differences in marital status (i.e., those with more younger buyers also tend to have more single buyers in their audience).



Professional Artist Status, by Age Cohort and Ethnicity



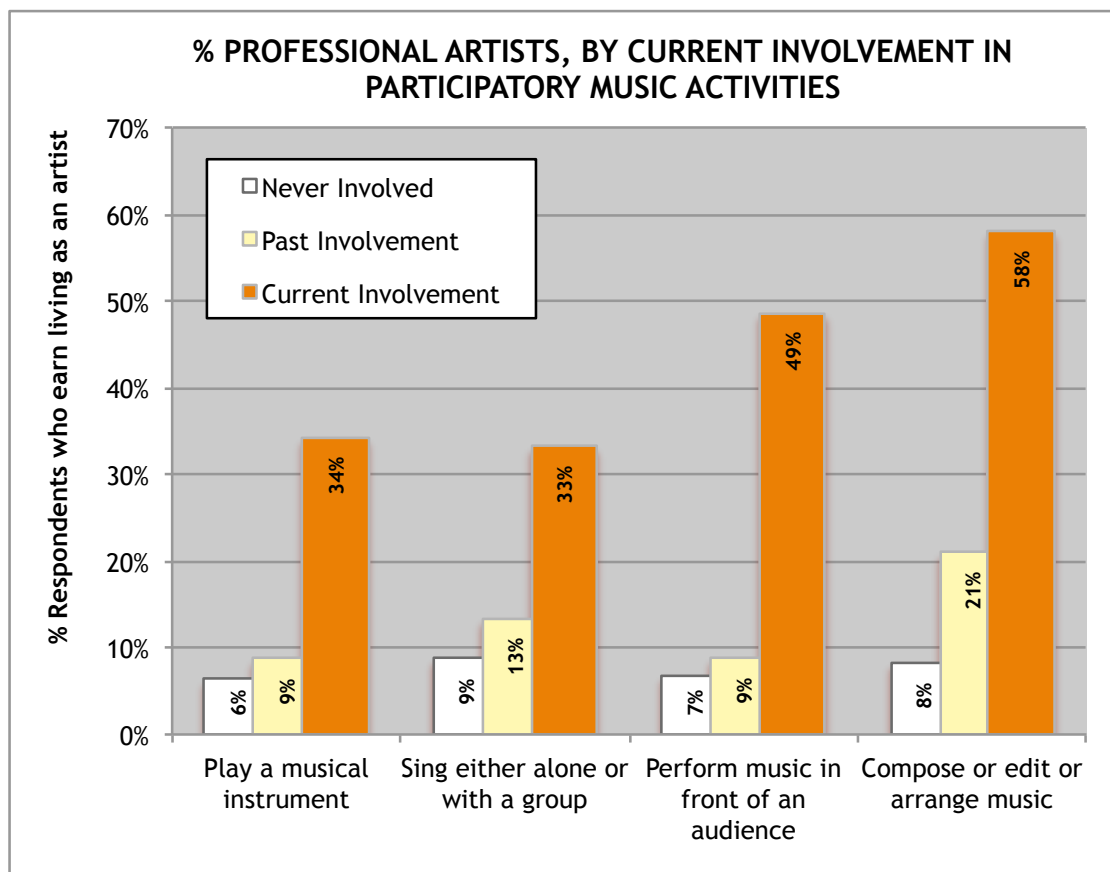
- Respondents were asked if they earn a portion of their income from performing or creating art (i.e., “professional artists”). At left, results are reported by age cohort and by race. Below, results are reported by partner.
- The most significant finding is that younger ticket buyers (age 18-34) are twice as likely as respondents in the other age cohorts to self-identify as artists. Significant differences were also observed across the race cohorts.
 - While we have observed similar findings in the dance and theatre audiences, this is the first time we’ve seen this in the music audience. Younger adults are more likely to be actively involved in the jazz. This indicates a need for more active, participatory engagement opportunities for younger adults.



- Overall, Major University Presenters jazz buyers were most likely to self-identify as artists, while JAG buyers were least likely. This may reflect age, to some extent, but also other factors.



Professional Artist Status, by Age Cohort and Ethnicity



- Further analysis was done to see what portion of the people who self-identified as income-earning artists are involved in various music activities.
- For example, of the respondents who currently “play a musical instrument,” 34% earn a portion of their income from performing or creating art (any discipline). Thus, we may infer that 66% do not earn income from this activity.
- Conversely, nearly six in ten respondents who currently “compose or edit or arrange music” earn a portion of their income from making art. This makes some intuitive sense, given the specialty nature of music composition.
- Approximately half of the people who “perform music in front of an audience” earn any income from art-making.

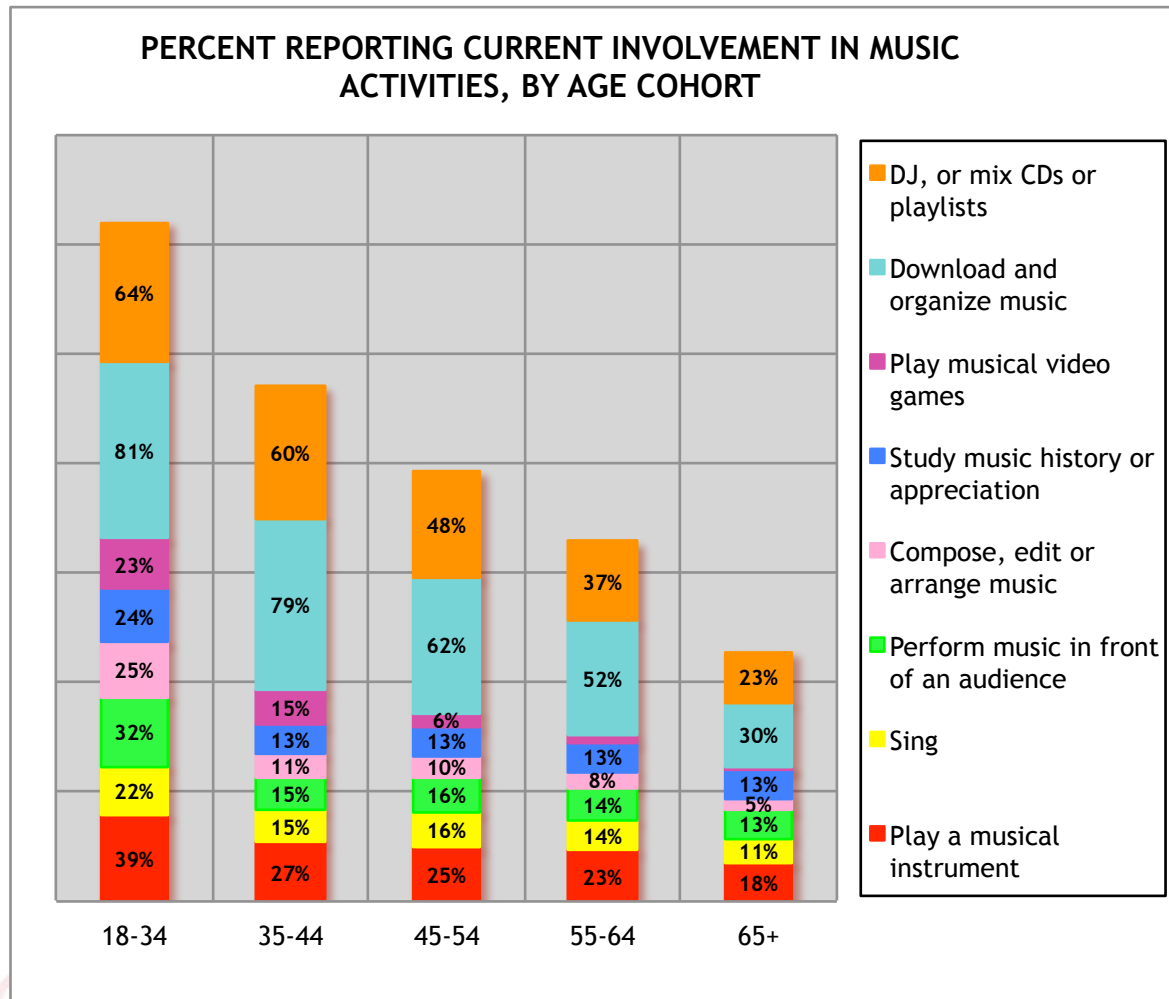




Relationship with Music

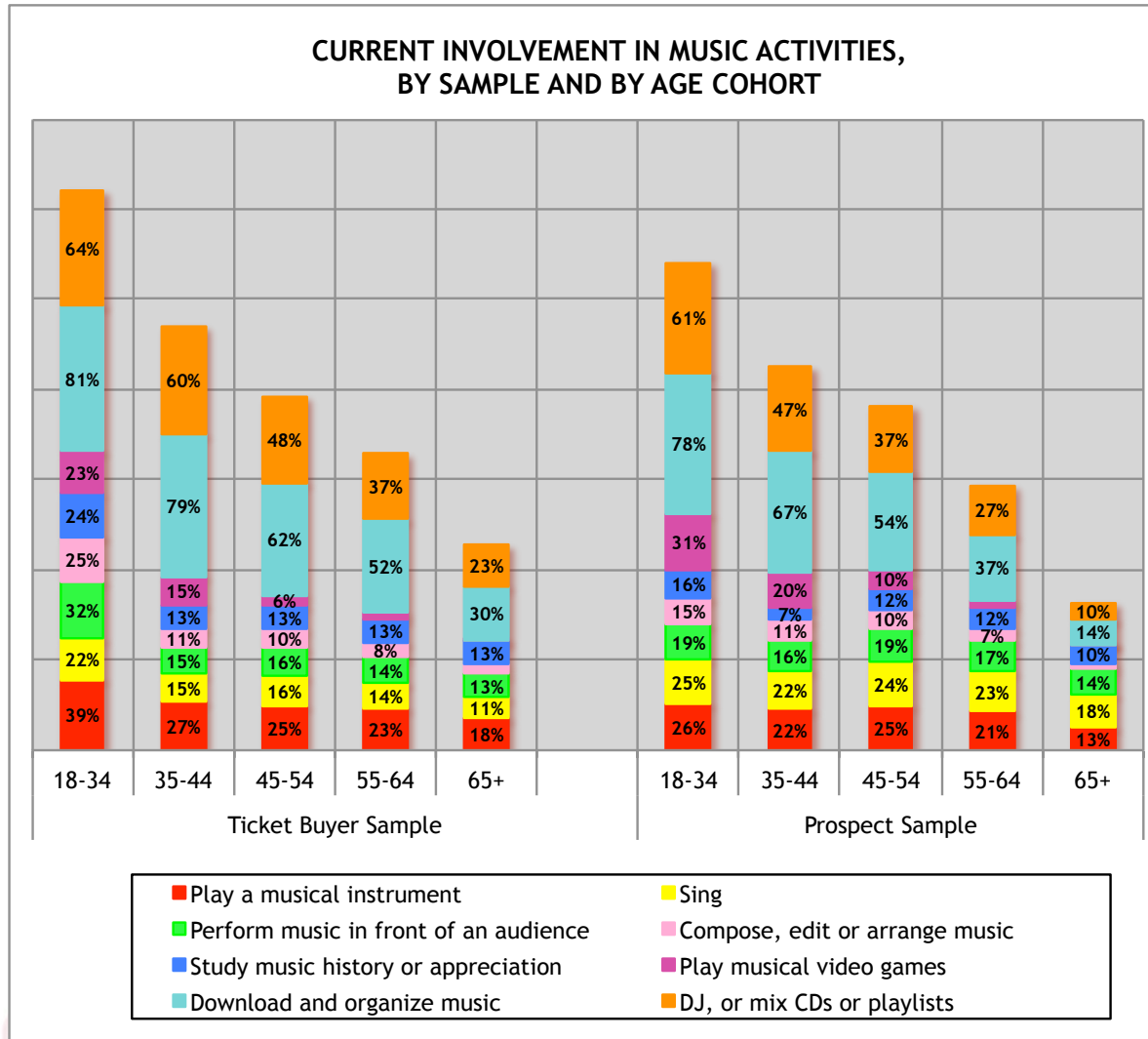


Current Involvement in Music Activities, by Age Cohort



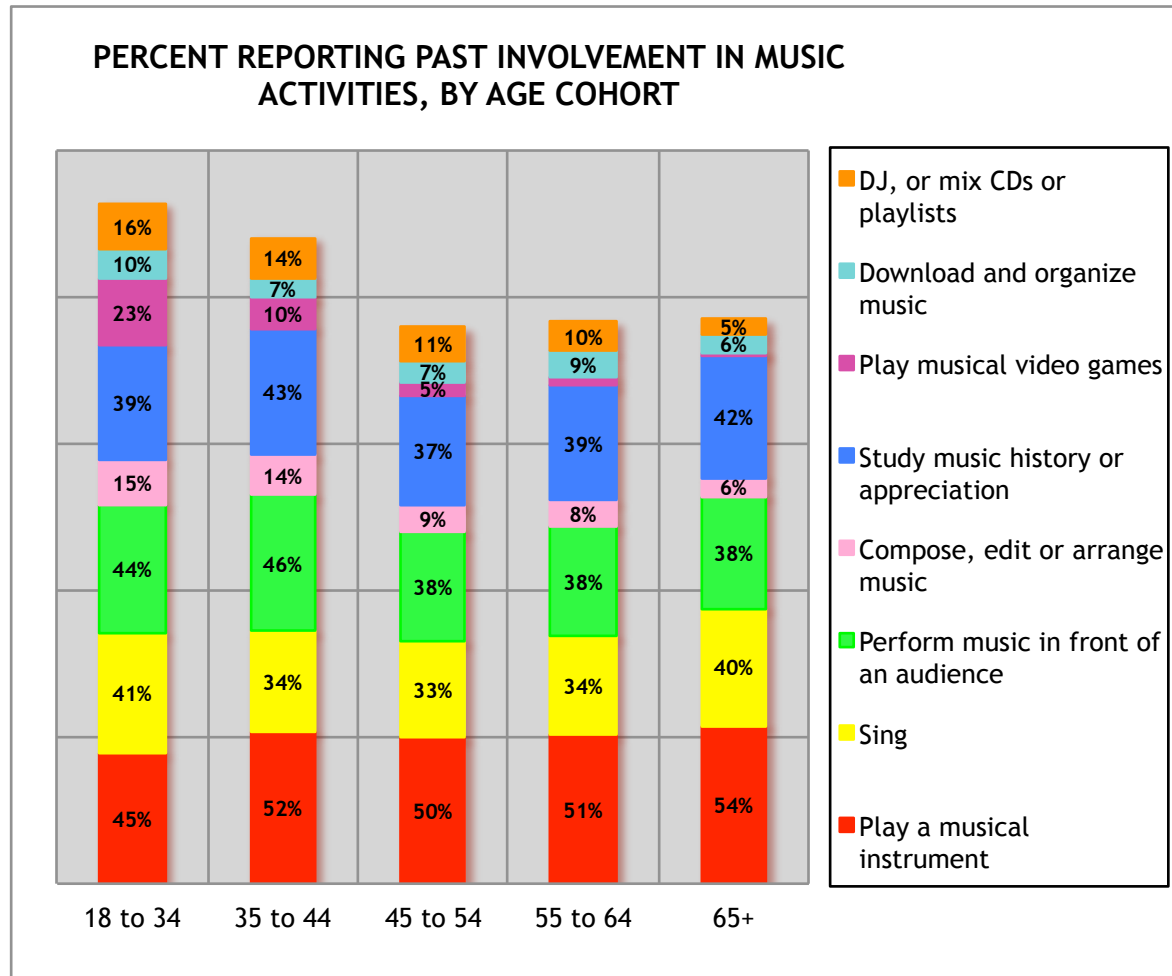
- Respondents were asked to indicate their current or past level of involvement in eight music activities. The chart at left reports the percentages of respondents who indicated current involvement (aggregated samples).
- Across the eight activities, “download and organize music” is the dominant activity *across all age cohorts*, followed by “DJ, or mix CDs or playlists.”
 - Jazz ticket buyers are actively curating their personal music listening experience, and find value in downloading and organizing music. How can jazz presenters tap into this value system? Can jazz presenter survive in the long run without getting involved in the digital music arena?
- A strong relationship between age and involvement in music activities can be observed. Again, this suggests that younger ticket buyers are more actively engaged in all forms of music participation.
 - It also raises an interesting policy question, which is how to keep older adults active in music activities.

Ticket Buyers vs. Prospects - Current Music Involvement, by Age



- Similar results were found amongst respondents in the prospect sample (i.e., people who like music, but do not attend jazz concerts on a regular basis), further validating this finding.
- Overall levels of current involvement in music activities are only slightly lower amongst prospects, compared to ticket buyers, suggesting that prospects, as a group, are already involved in music activities – they’re just not coming to jazz concerts on a regular basis.

Past Involvement in Music Activities, by Age

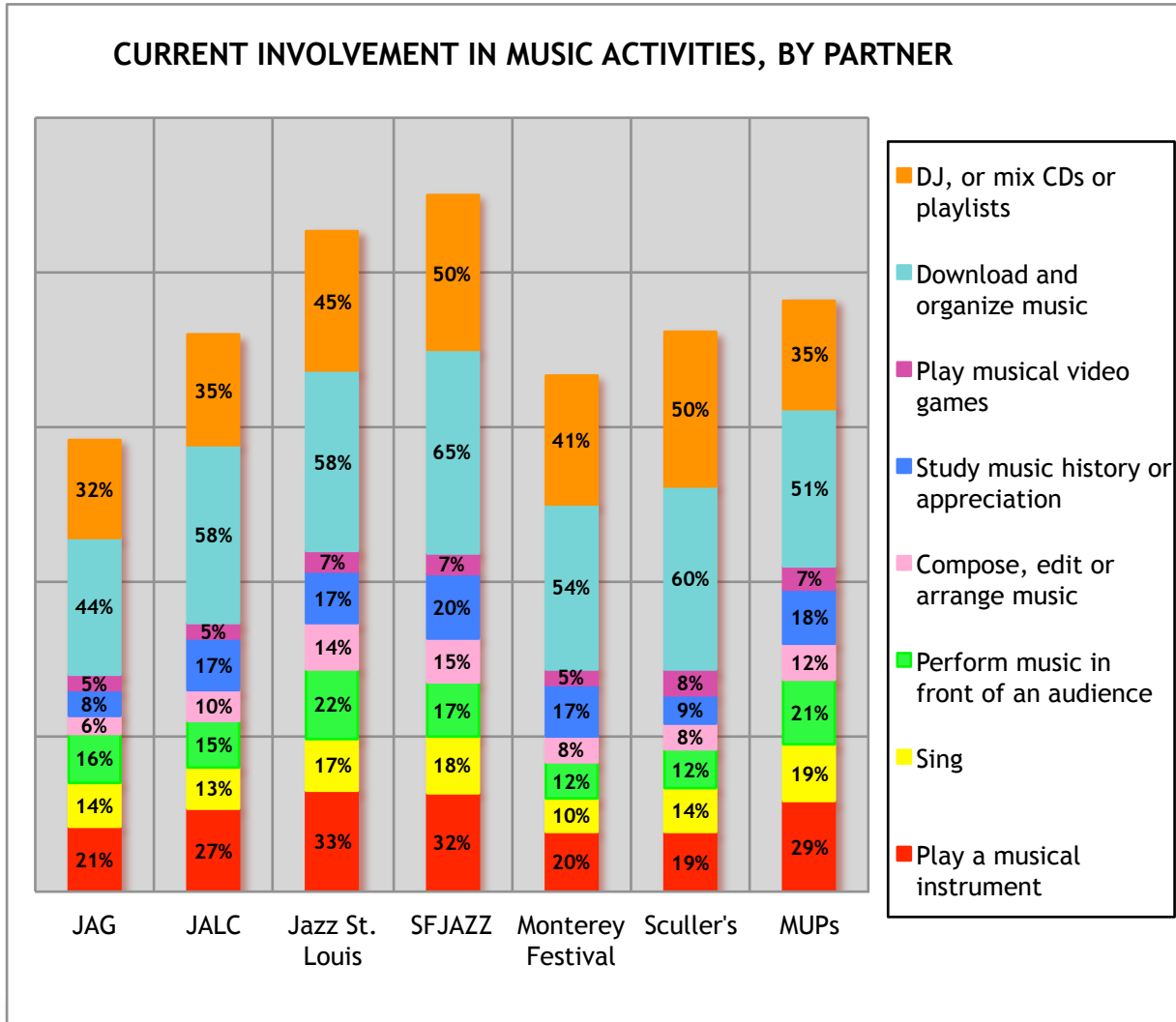


- While large percentages of ticket buyers reported current involvement in music downloading, large percentages also reported *past* involvement (“involved earlier in life, but no longer”) in a range of music activities, especially playing a musical instrument (51%, on average), studying music history or music appreciation (40%), performing music in front of an audience (39%) and singing, either alone or with a group (35%).

- It seems reasonable to conclude that approximately half of all jazz ticket buyers can read music. What does this indicate about audience engagement?
- How can jazz presenters re-awaken the music-making interests of this large segment of the audience?
- Here is what the Chicago Symphony decided to do: <http://citizenmusician.org/>

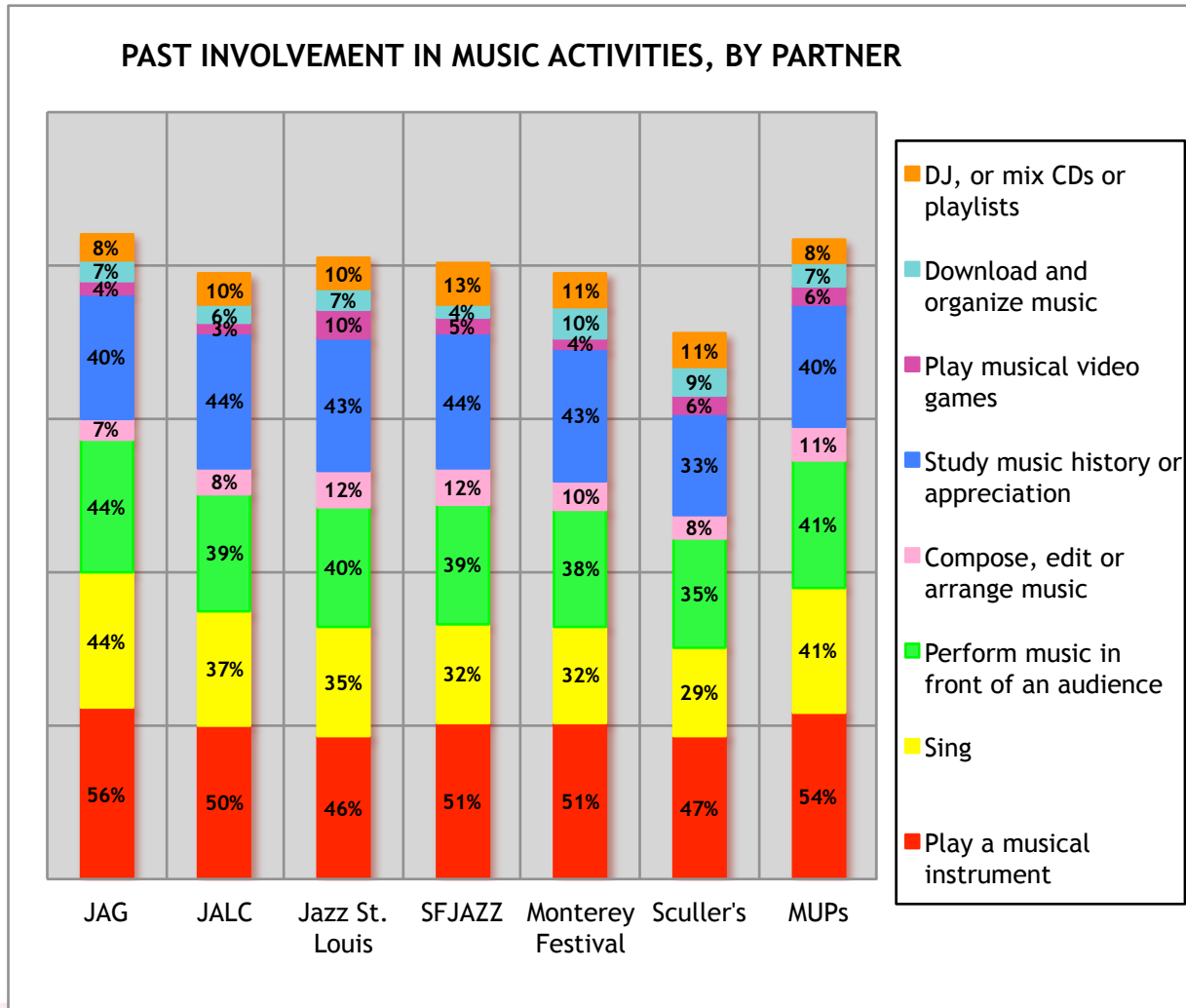


Current Involvement in Music Activities, by Partner



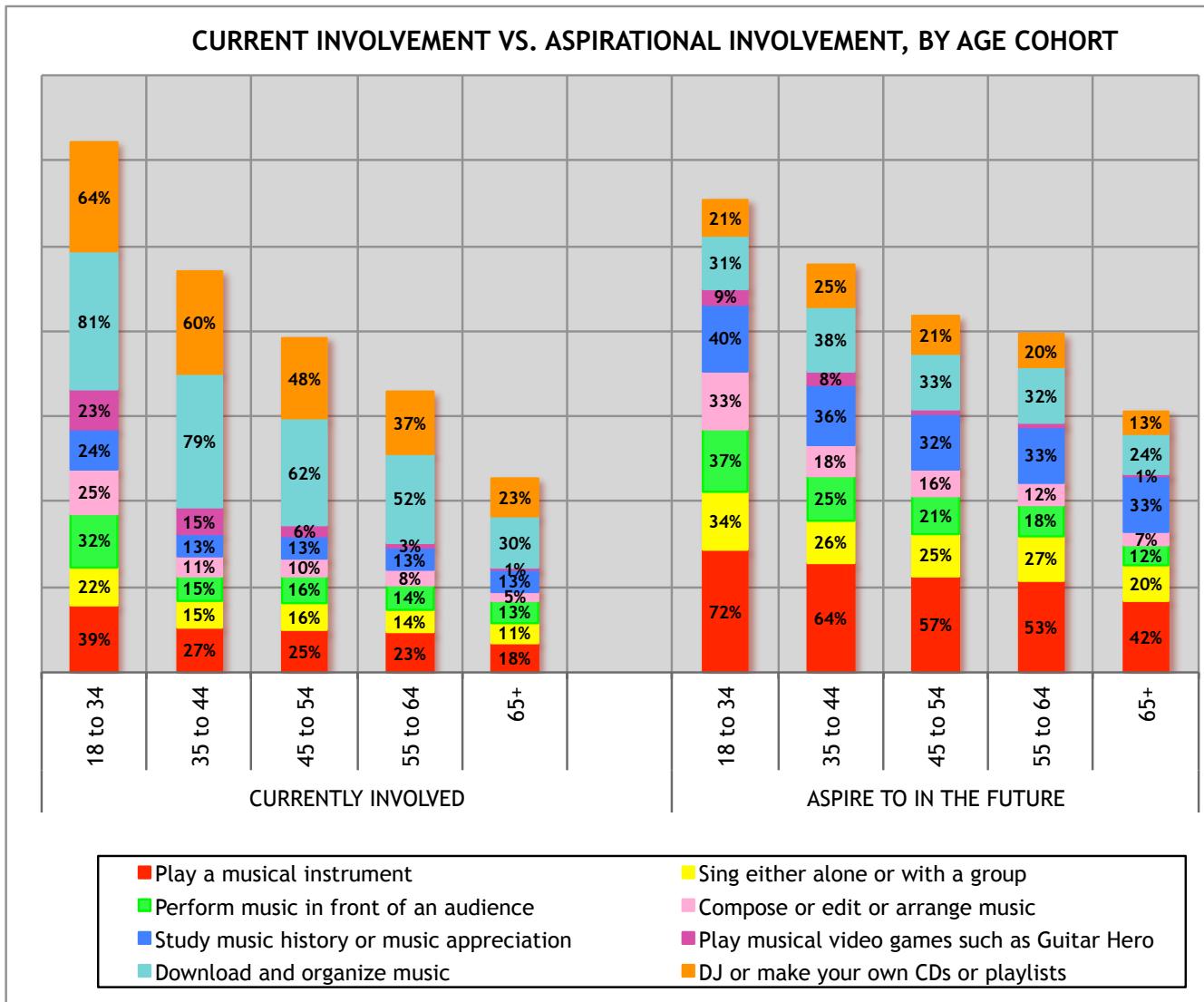
- Results vary dramatically across the seven study partners. SFJAZZ and Jazz St. Louis ticket buyers were most likely to report current involvement by a wide margin. These results are undoubtedly influenced somewhat by age (i.e., younger buyers are more actively engaged).

Past Involvement in Music Activities, by Partner



- Results for past involvement are quite similar across the seven partners, with the exception of the Sculler's audience, which was slightly less likely than other audiences to report past involvement.

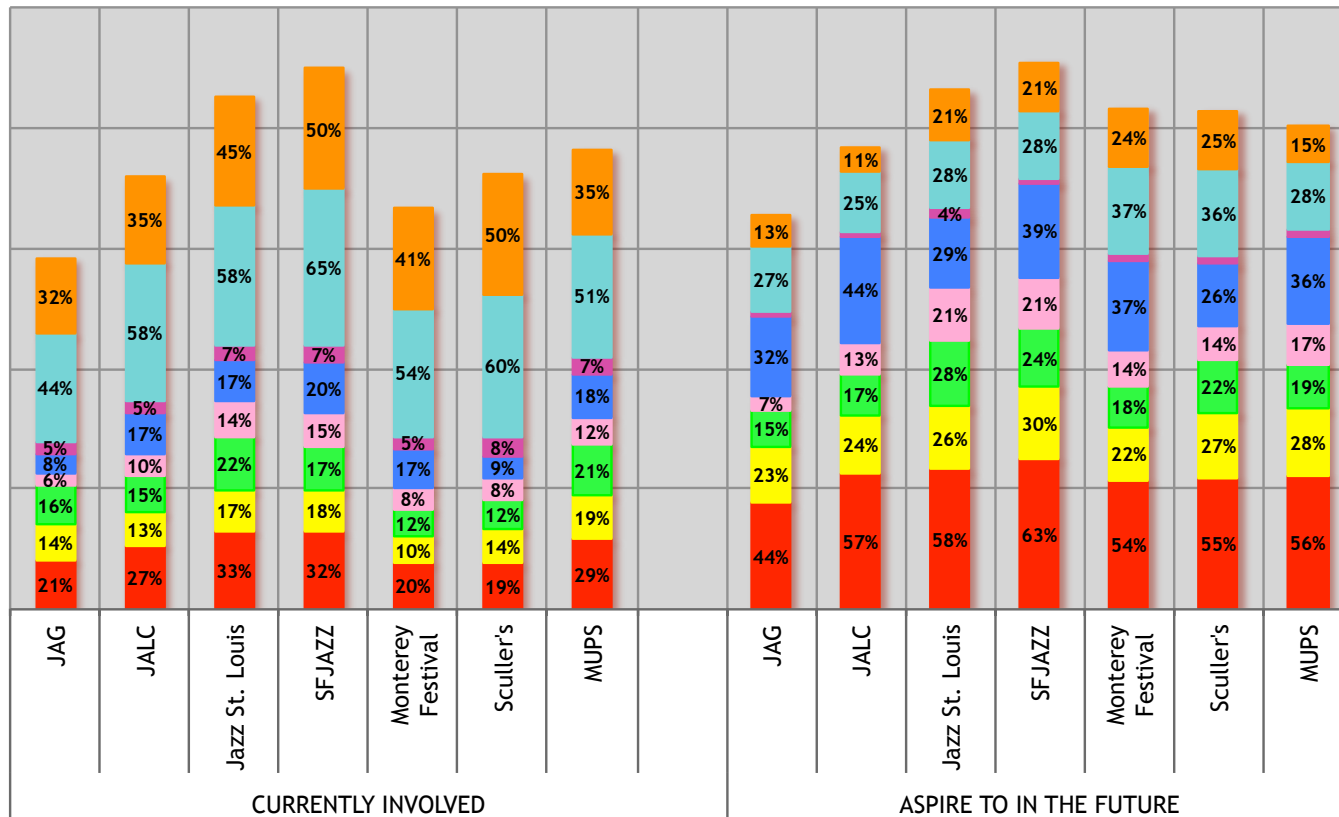
Current vs. Aspirational Involvement, by Age Cohort



- 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.”
 - It is truly remarkable that 54% of all ticket buyers, across all seven sites, indicated that they would like to play a musical instrument in the future. Of course, the figures are highest for younger patrons.
- Note that over a third would like to “study music history or music appreciation.”

Current vs. Aspirational Involvement - by Partner

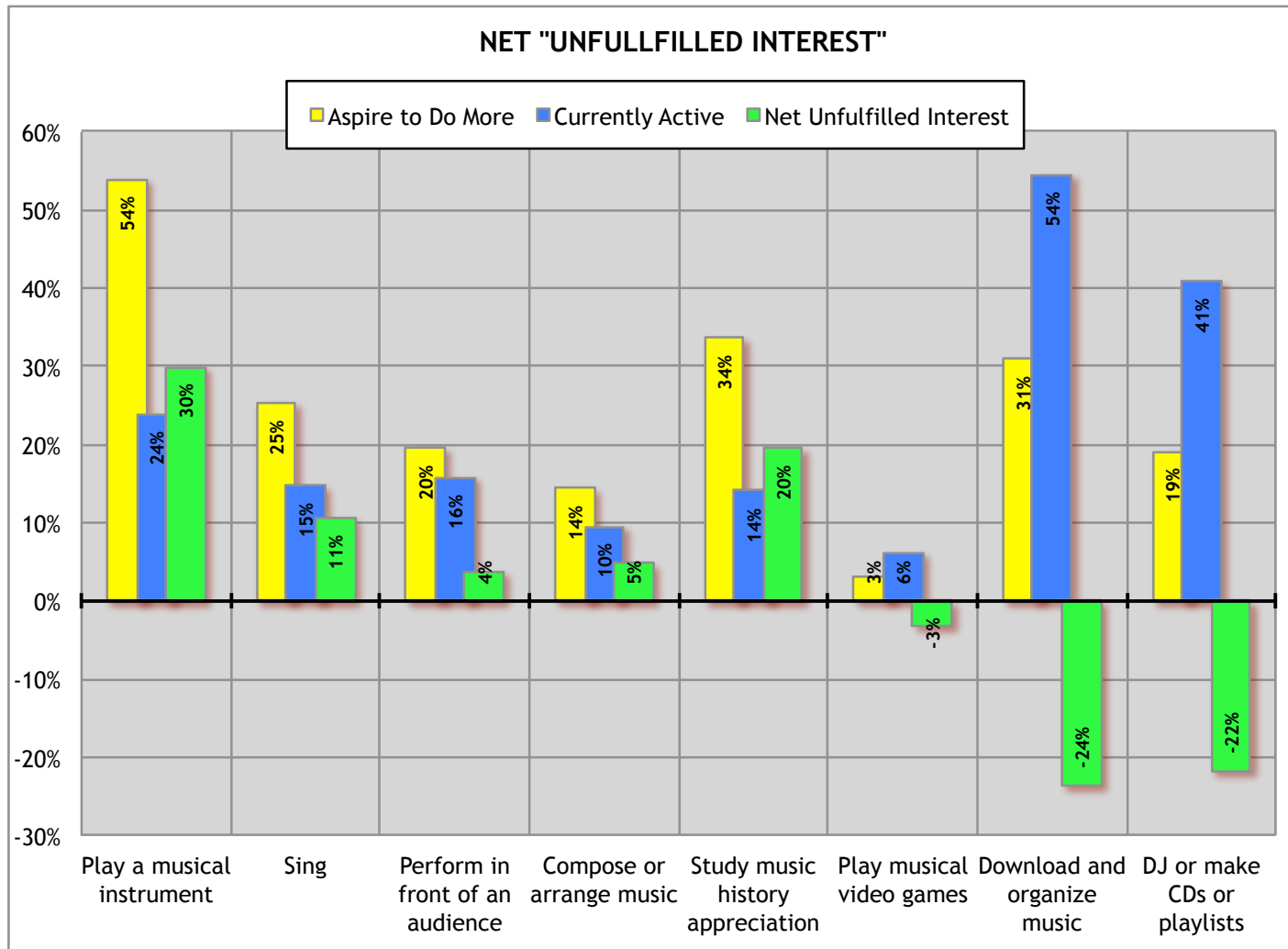
CURRENT VS. ASPIRATIONAL INVOLVEMENT, BY PARTNER



- Here, results are reported by partner. Results follow a similar pattern.



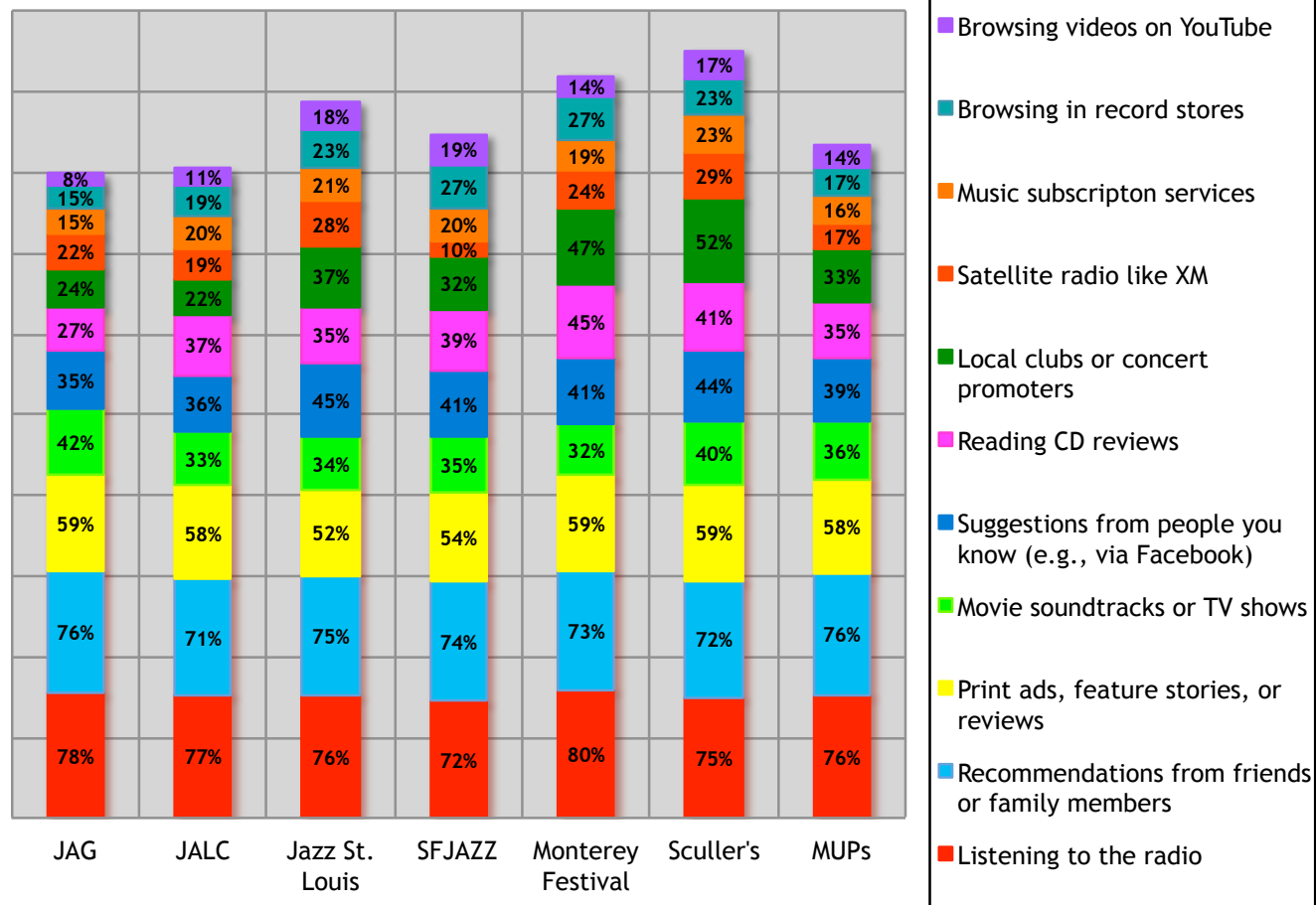
Unfulfilled Interest



- To further isolate the activities most desired, but least done, by respondents, the figures for current involvement were subtracted from the figures for aspirational involvement, and graphed. The green bars represent the percentage of respondents across all seven sites that reported “net unfulfilled interest” in each activity.
- The top two activities in this analysis are ‘play a musical instrument’ (30% net unfulfilled interest), followed by ‘study music history or music appreciation’ (20%).
 - Since so many people are already downloading music, relatively few aspire to do so more often.

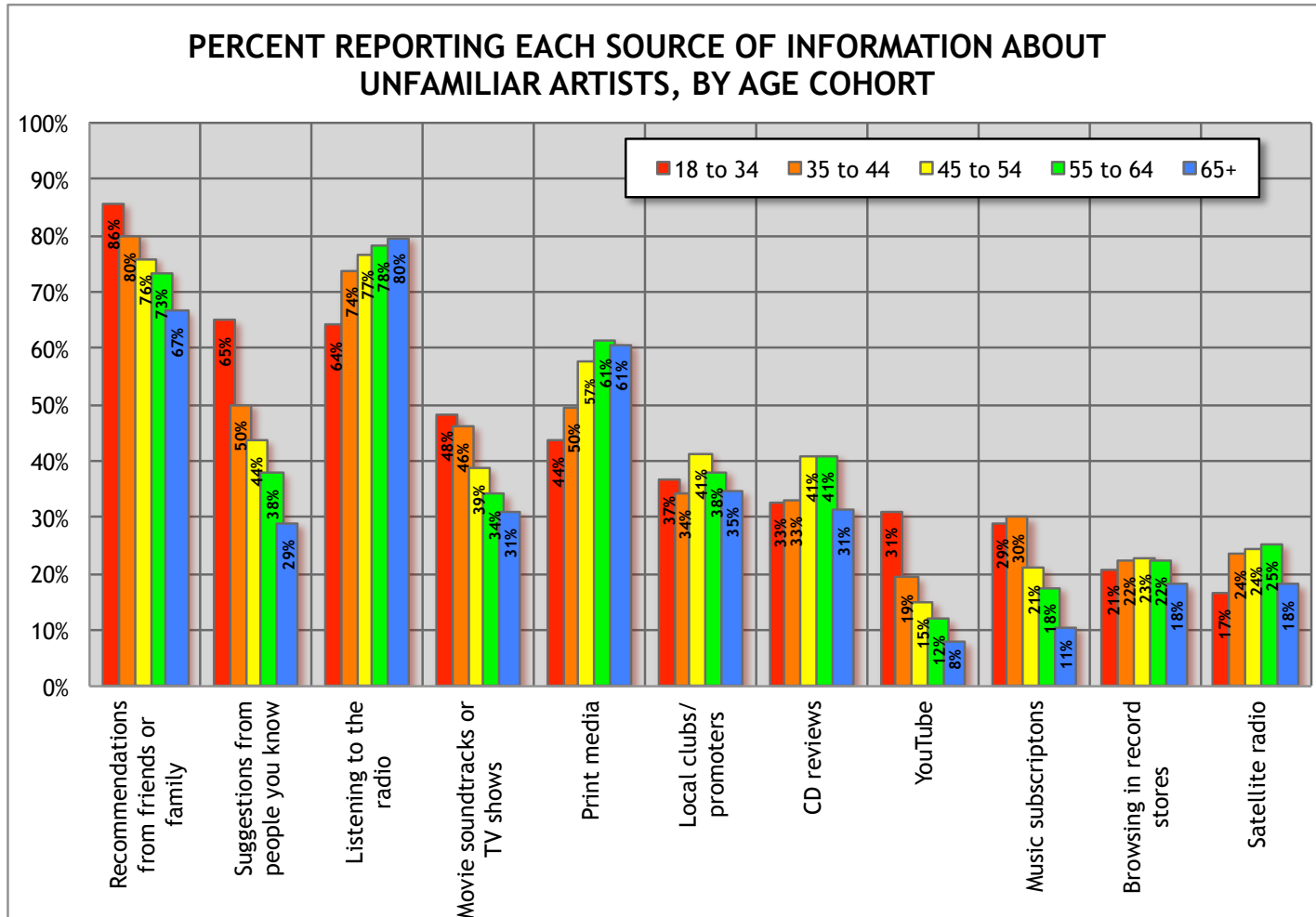
Information Sources about Unfamiliar Music Artists

SOURCES OF INFORMATION FOR DISCOVERING NEW ARTISTS, BY PARTNER



- Respondents were asked, “How do you discover new or unfamiliar music artists?” (multiple responses were allowed). Results are very consistent across the seven partners.
- ‘Listening to the radio’ is nearly equal to ‘recommendations from friends or family members’ (i.e., word of mouth), although we do not know the extent to which this refers to terrestrial radio vs. “Internet radio” services such as iTunes radio or Pandora.
- The third most frequently cited source of information about unfamiliar artists was ‘from seeing advertising, feature stories, or reviews magazines or newspapers.’
- Note that Sculler’s and Monterey Jazz Festival respondents are significantly more likely to hear about new artists through ‘local clubs or concert promoters,’ perhaps a function of their relationship with these two organizations.

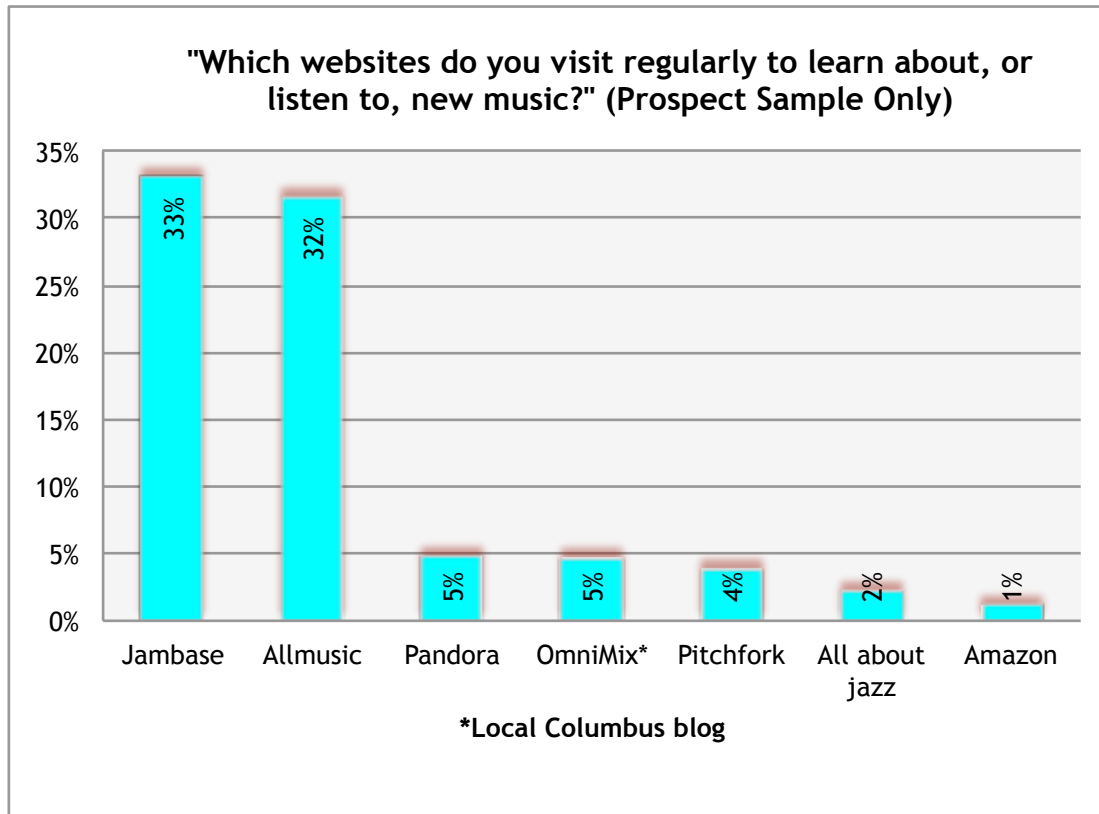
Information Sources about Unfamiliar Music Artists, by Age Cohort



- When cross-tabulated by age cohort, results re-confirm a well known trend amongst younger consumers, namely the growing importance of word-of-mouth, especially through social media, and the decreasing influence of print media.
- Note also the higher influence of movie soundtracks amongst younger buyers.
- Music subscription services (e.g., e-music, iTunes) are also more likely to influence younger buyers, as might be expected.
- Overall, results point to the fragmentation of information sources about unfamiliar artists, and the growing influence of personal recommendations. This corroborates the finding from the music listening study that musical tastes are socially transmitted.



Online Music Resources - Prospect Sample Only



- Prospects were asked which Internet sites they visit regularly to learn about or listen to music, in general. Multiple responses were allowed.
- Approximately one-third of all Prospects visit Jambase and Allmusic on a regular basis. Other websites, on the whole, are not frequently visited.
 - How can jazz presenters leverage these resources?

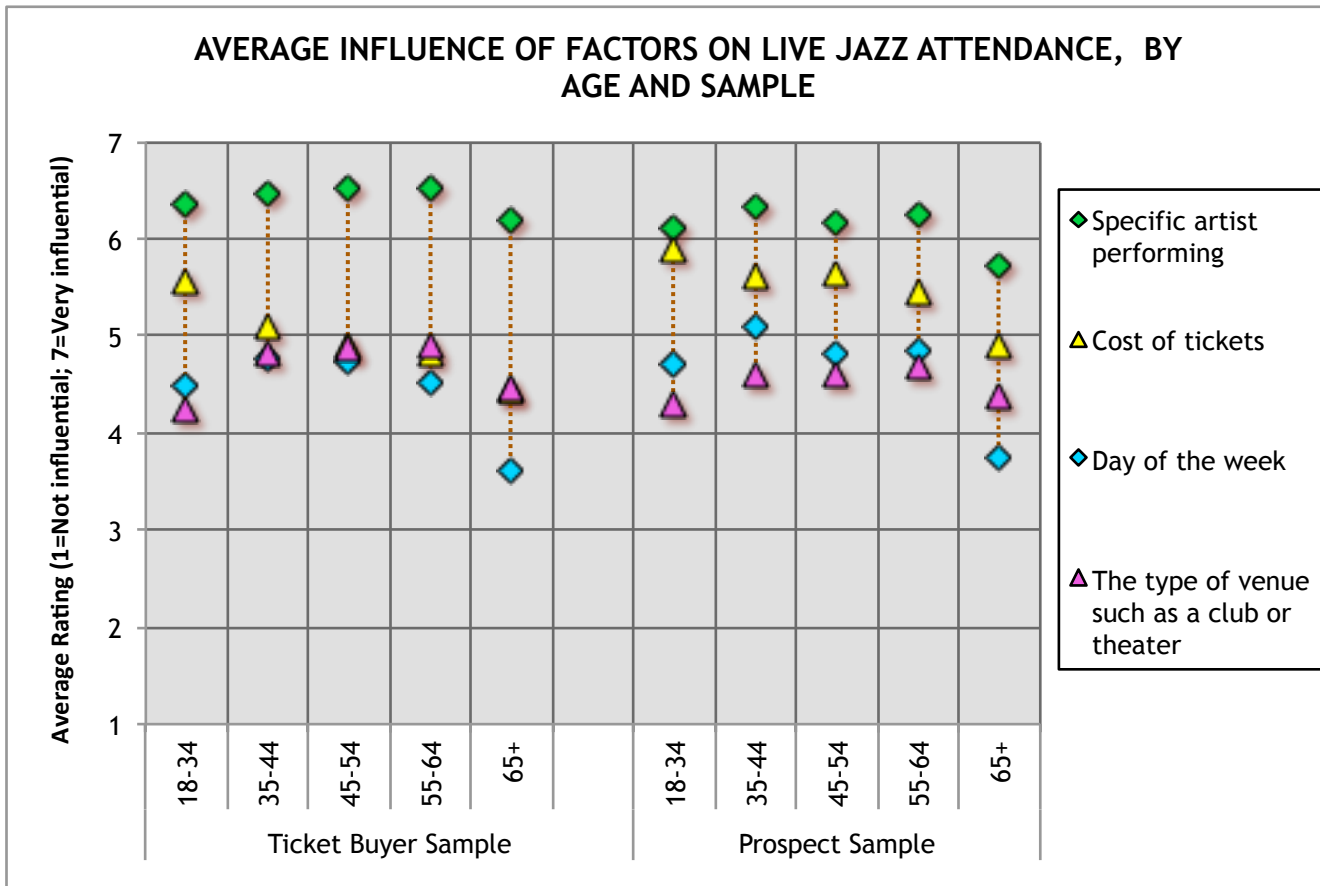




Purchase Decision Factors, Attendance Patterns and Venue Preferences



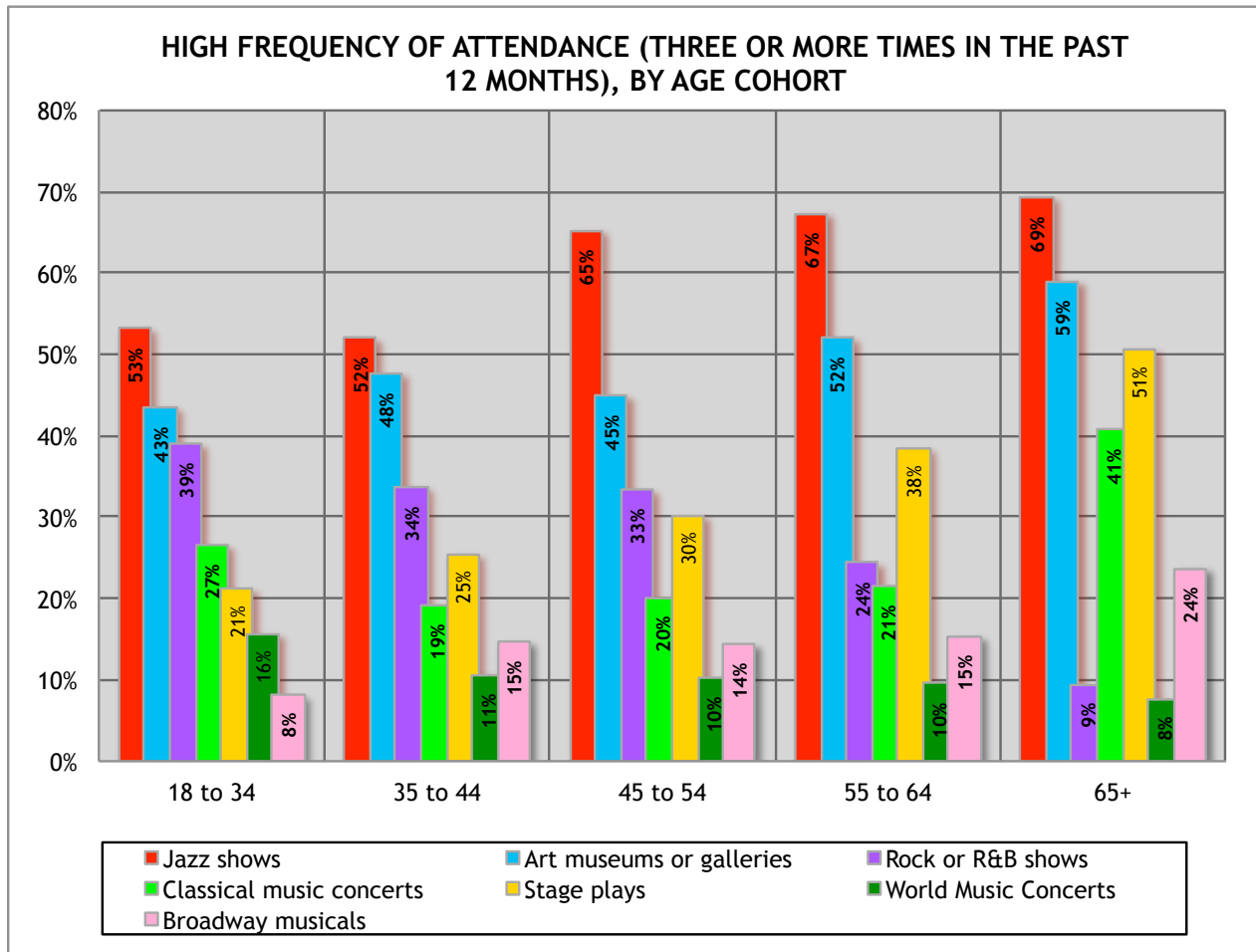
Influence of Purchase Decision Factors, by Age Cohort and Sample



- 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 compares results for the ticket buyer and prospect samples by age cohort.
- As hypothesized by several of the study partners, the dominant decision factor by a wide margin is the specific artist.
- Cost play a secondary role, especially amongst younger buyers. In fact, cost is nearly as important as the artist amongst prospects in the 18-34 cohort.
 - Results indicate that audience development efforts to engage younger prospects must address the cost issue.
- Amongst most ticket buyers, the venue is as important a factor as the day of the week (except for older buyers, who, presumably, have more flexibility in the schedules).
- Results are very consistent across the seven partners (not shown).



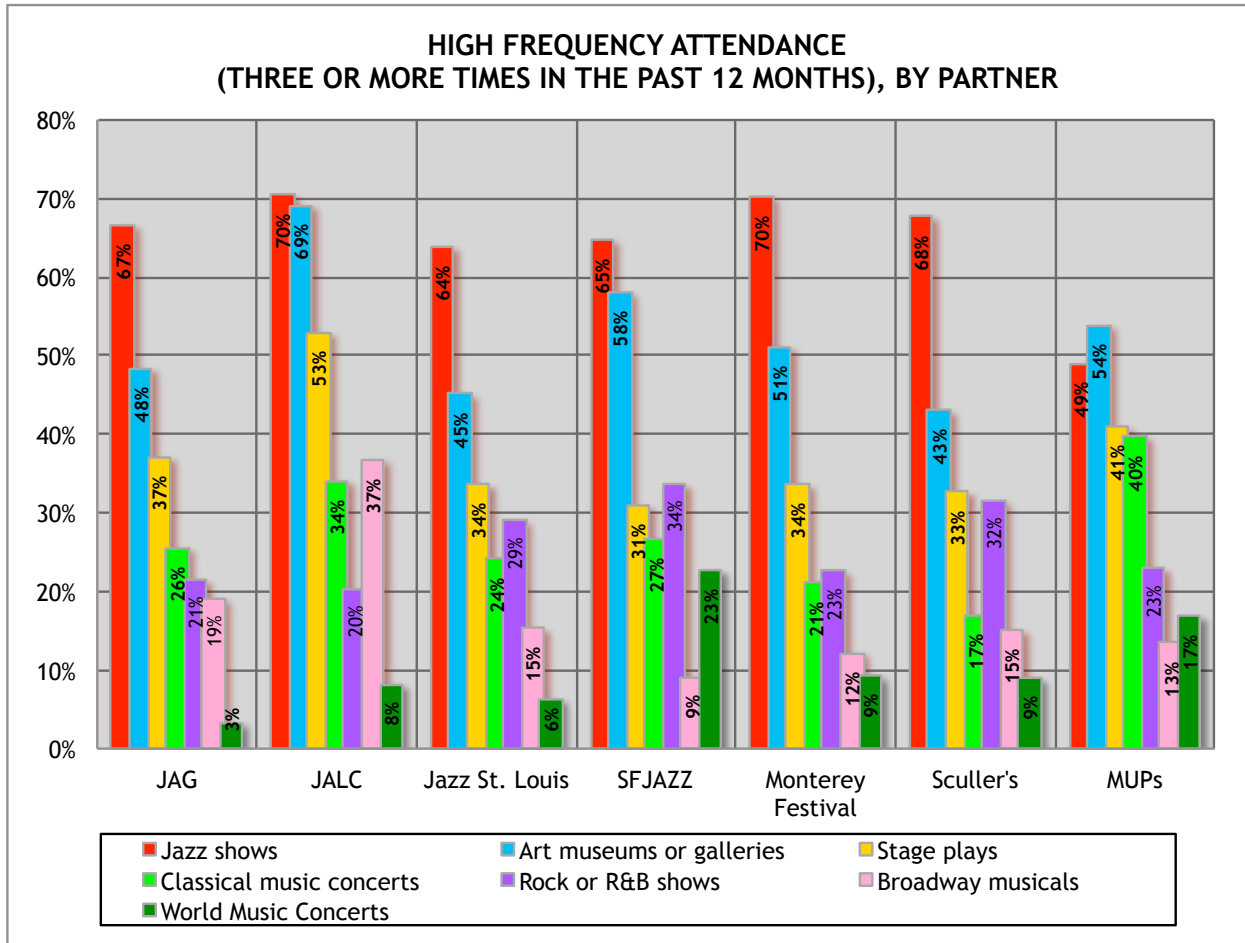
Frequency of Attendance at Types of Arts Events, by Age Cohort



- 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 at seven different types of arts programs. The chart at left reports the aggregate percentage of respondents who reported attending each type of arts program three or more times in the past 12 months.
- Of course, frequency is highest for jazz shows, given that this is a sample of jazz ticket buyers. Note, however, the lower percentage of frequent jazz attendance amongst younger buyers, and a higher percentage of frequent attendance at “Rock or R&B shows.”
 - This is the first of several findings which suggest that younger patrons have categorically more eclectic musical tastes than their older counterparts.
- On average, jazz buyers are most likely to be found at art museums, of the six other types of arts programs tested. Other patterns are also quite interesting, such as the higher frequency of attendance at Broadway musicals amongst older patrons.



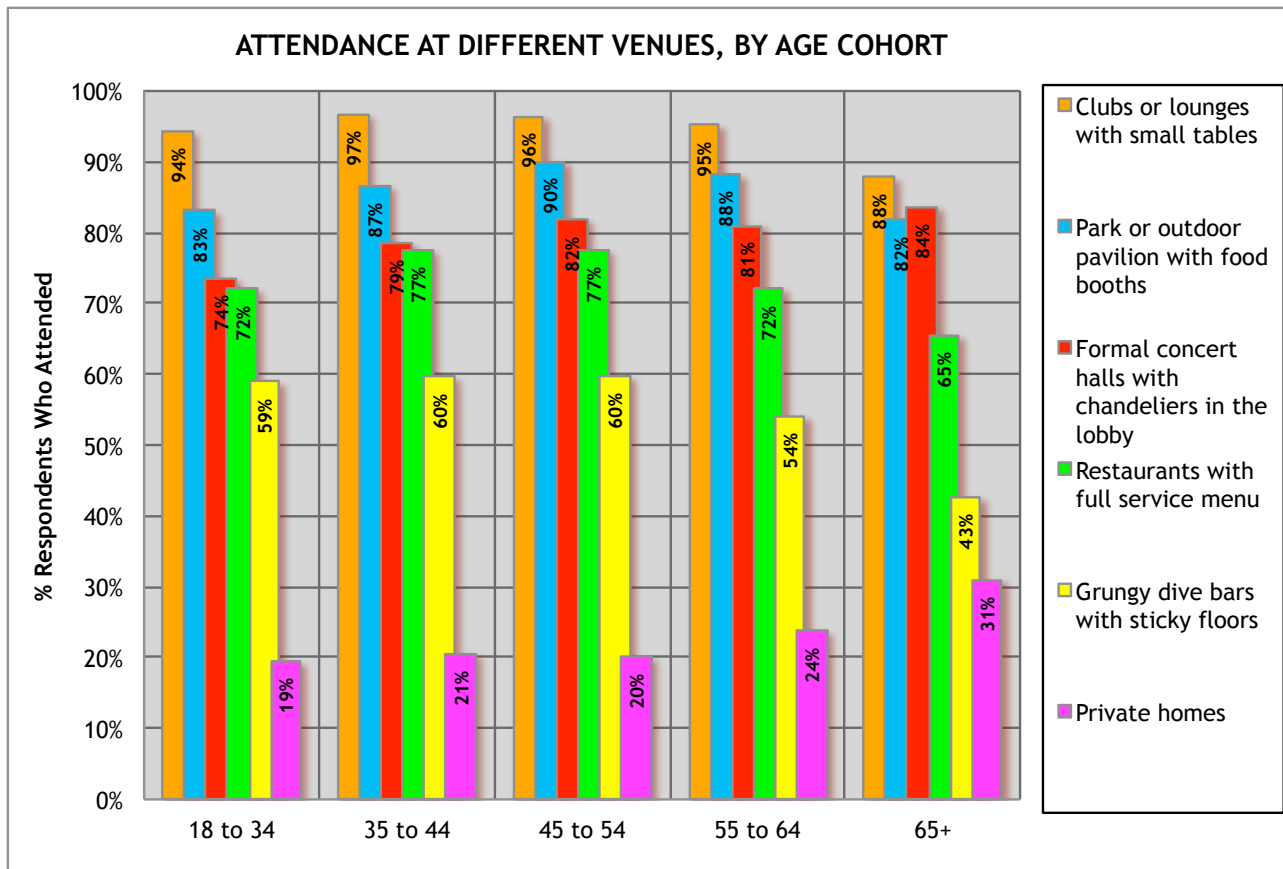
Attendance at Arts Events - By Partner



- Further analysis of the frequency data by partner reveals some striking, but intuitive differences.
- Note, for example, the higher prevalence of museum-going, as well as stage play and Broadway attendance amongst Jazz at Lincoln Center buyers, undoubtedly a reflection of the wealth of supply of these types of programs in the New York City market.
- Also note the lower frequency of jazz attendance, but higher levels of attendance at stage plays and classical music concerts amongst respondents in the Major University Presenters cohort. This may be explained by the limited jazz programming offered by some of these presenters, and the rich variety of other programming offered.
- We also note the higher levels of attendance at world music concerts reported by SFJAZZ ticket buyers, undoubtedly a reflection of the diversity of SFJAZZ programming, which includes a great deal of world music. In general, however, jazz buyers are much more likely to consume classical music vs. world music, although this seems to be largely a function of supply.



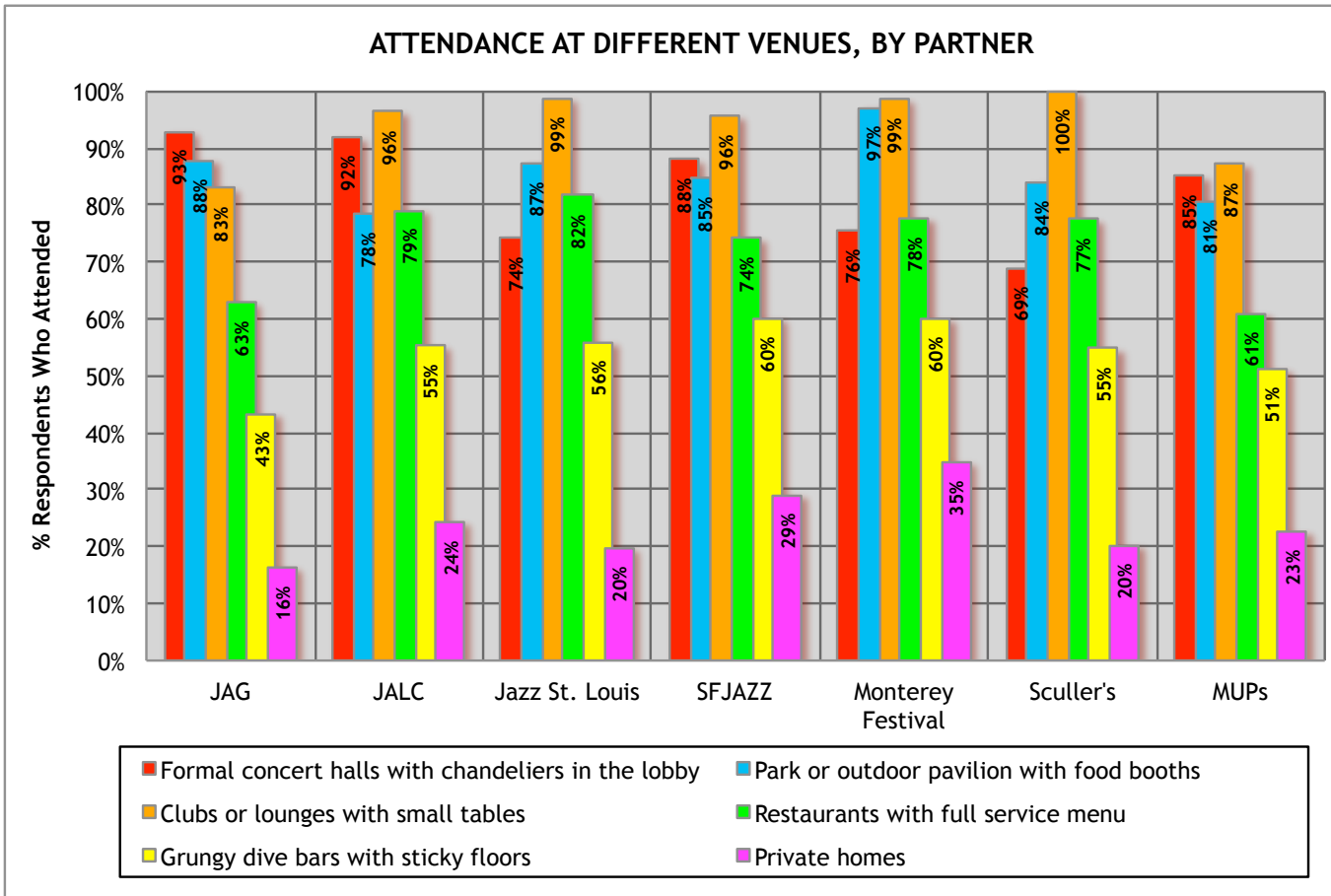
Lifetime Rates of Attendance at Types of Jazz Venues, by Age Cohort



- The study also investigated levels of preference for different types of jazz venues. The chart at left reports the percentages of respondent who’ve ever attended a live jazz concert in each of the six types of venues.
- On average, more respondents reported having ever attended jazz concerts at “clubs or lounges with small tables” than any other type of venue.
- Results are consistent across the age cohorts, although older patrons have less experience with “grungy dive bars with sticky floors,” as would be expected.
- The overall picture is one of a multiplicity of settings.



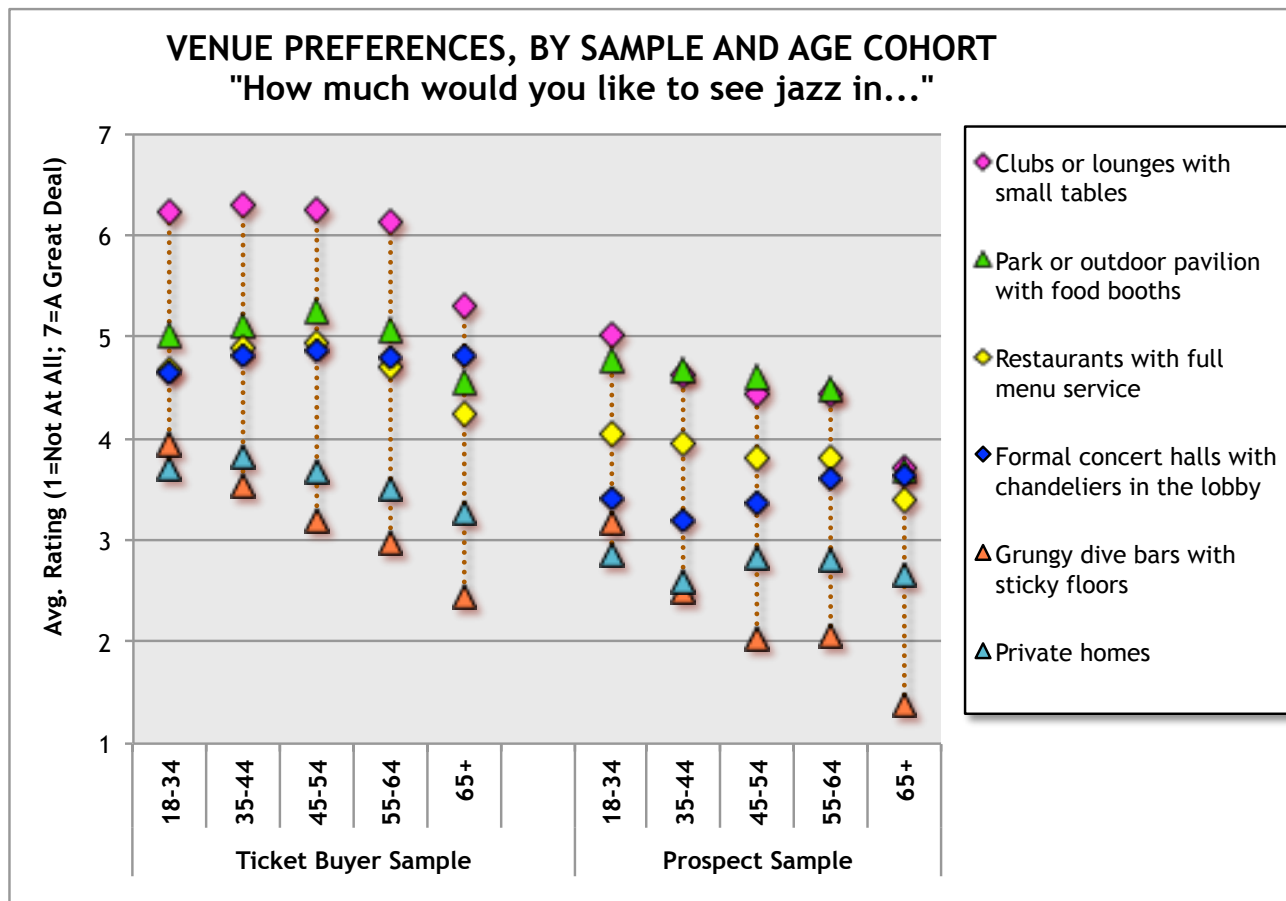
Lifetime Rates of Attendance at Different Types of Jazz Venues, By Partner



- Subtle differences can be observed across the seven partners. For example, Monterey Jazz Festival audiences were most likely to report having ever attended live jazz in a private home.



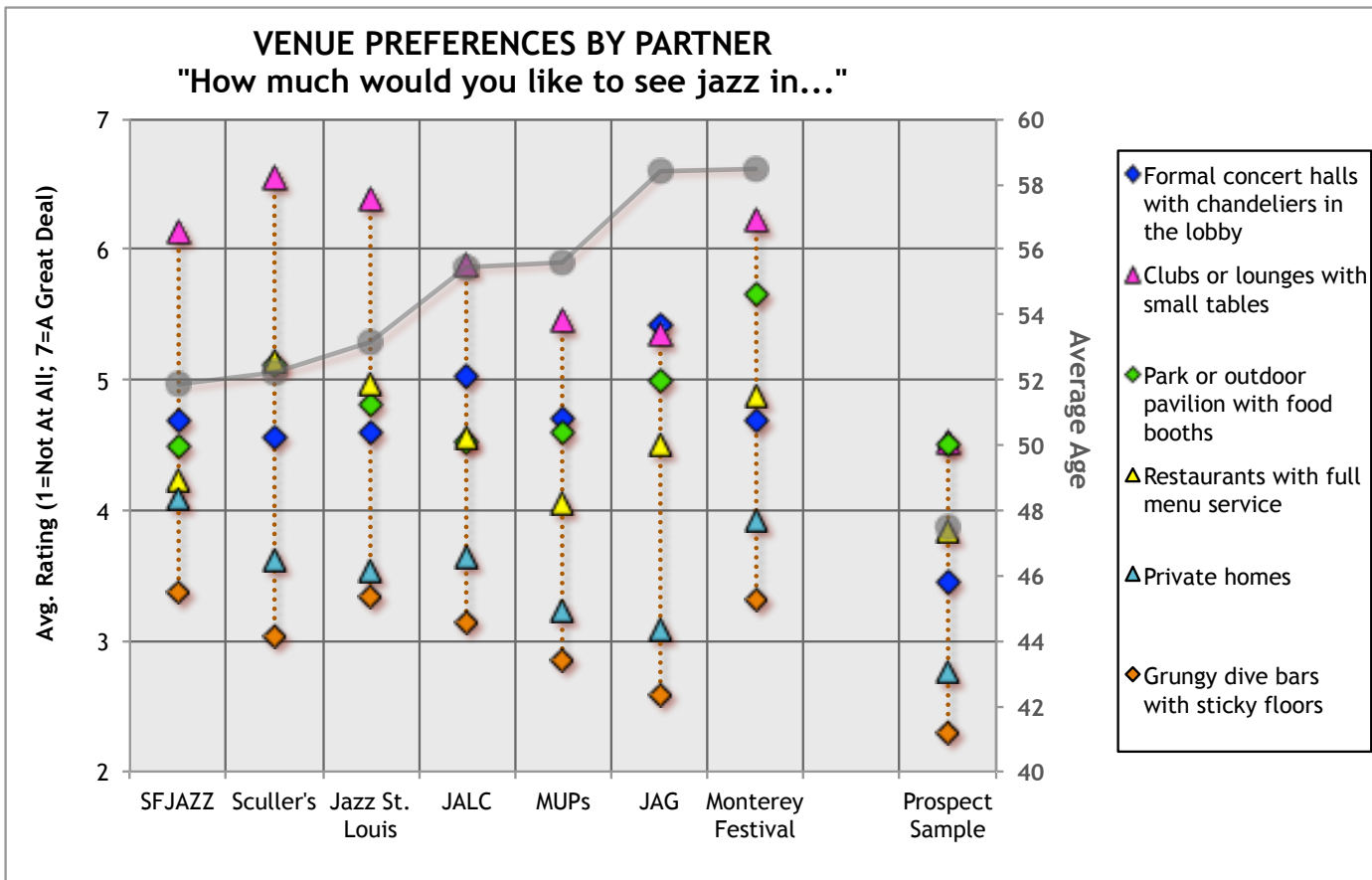
Venue Preferences - By Age Cohort



- To further explore venue preferences, respondents were asked to rate their preference for the six venue types. The chart at left compares aggregated results for ticket buyers and prospects, by age cohort. There are many interesting patterns here.
- On average, the combined results for ticket buyers indicate a clear preference for clubs and lounges, except amongst the oldest age cohort.
 - Note the generally higher levels of importance attached to informal settings amongst younger patrons and prospects alike. What are the implications of this finding for audience development?
- Secondly, jazz buyers prefer outdoor venues, restaurants, and formal concert halls.
- For prospects, clubs and lounges are equally preferred to outdoor venues, suggesting that both of these settings are crucial to audience development.



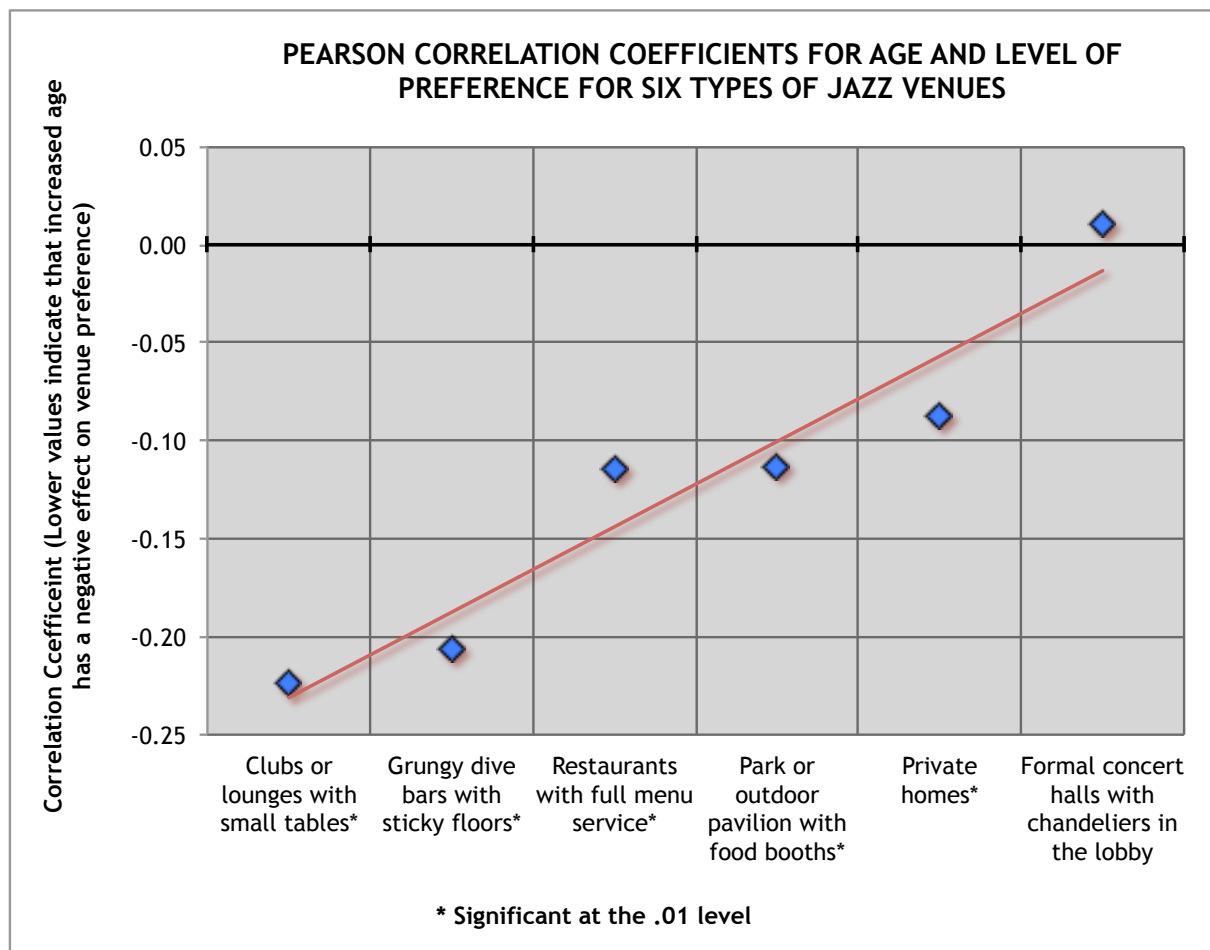
Venue Preferences - Analysis By Sample, Partner and Average Age



- Significant but intuitive differences were observed across the seven partners, and between ticket buyers and prospects.
- For example, Sculler's buyers report the highest preference level for restaurants. The Sculler's facility includes full restaurant service.
- Similarly, Monterey Jazz Festival audiences reported the highest preference levels for parks and outdoor settings.
- Note also the large differences in preference levels for clubs and lounges between the partners, also a reflection of their programming and venues.
- In order to consider these results in light of age, average age figures are plotted on the right hand axis.
- Compared to ticket buyers, prospects reported generally lower preference levels for all types of jazz venues.



Correlation Between Age and Venue Preference



- To further investigate venue preference in relation to age, correlations were run between age and preference levels for the six venue types. Correlation coefficients run from -1.0 to +1.0. Negative coefficients suggest an inverse relationship with age.
- For example, the correlation coefficient for age and preference for clubs and lounges is -.22. In other words, as age rises, preference for clubs and lounges decreases.
- Overall, younger audiences are most likely to prefer informal settings, and least likely to prefer formal settings (e.g., “formal concert halls with chandeliers in the lobby”).
 - If informal settings such as clubs and lounges are where younger consumers want to hear jazz, what does this imply for jazz presenters, jazz artists, and the cultural infrastructure in general?

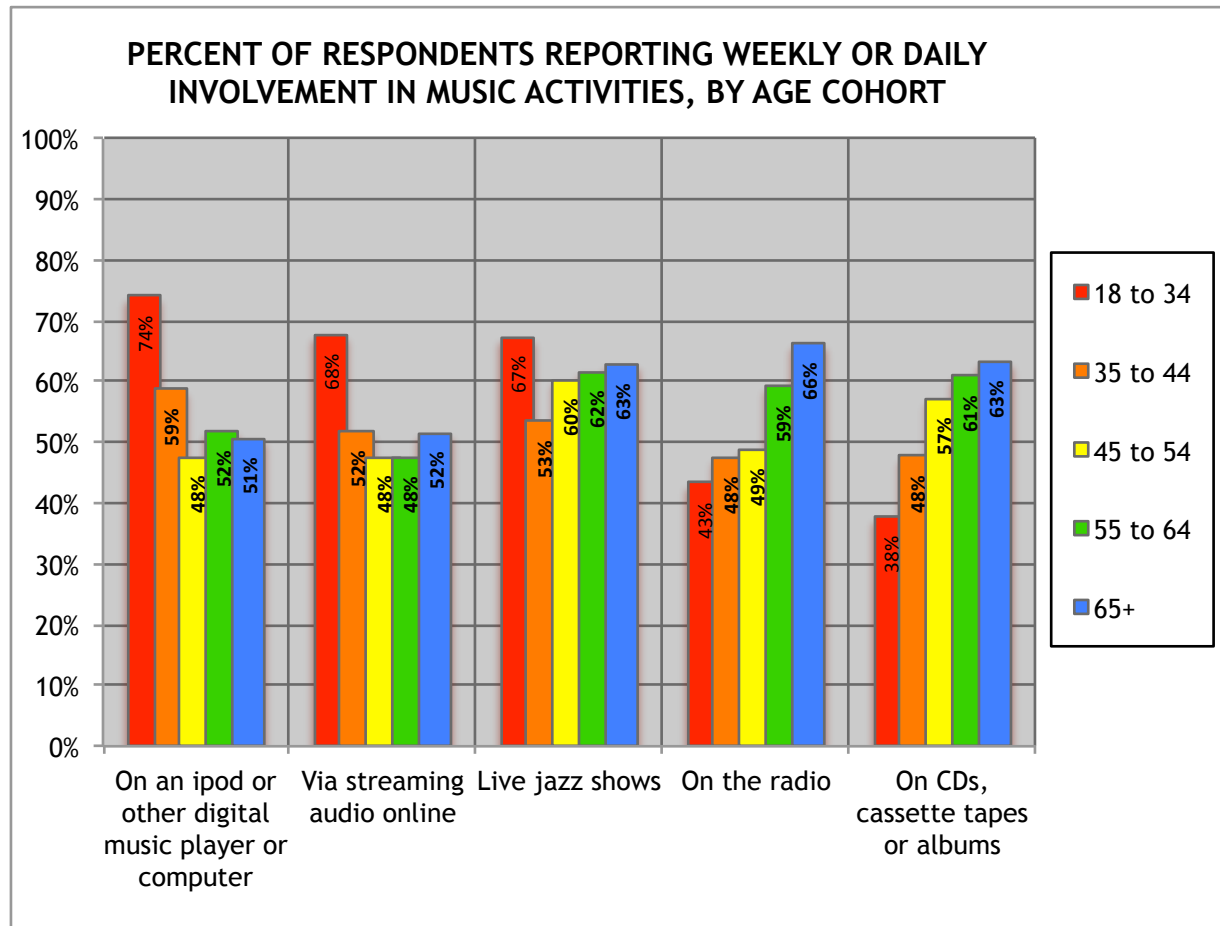




Relationship and with Jazz



Frequency of Jazz Consumption, by Age Cohort

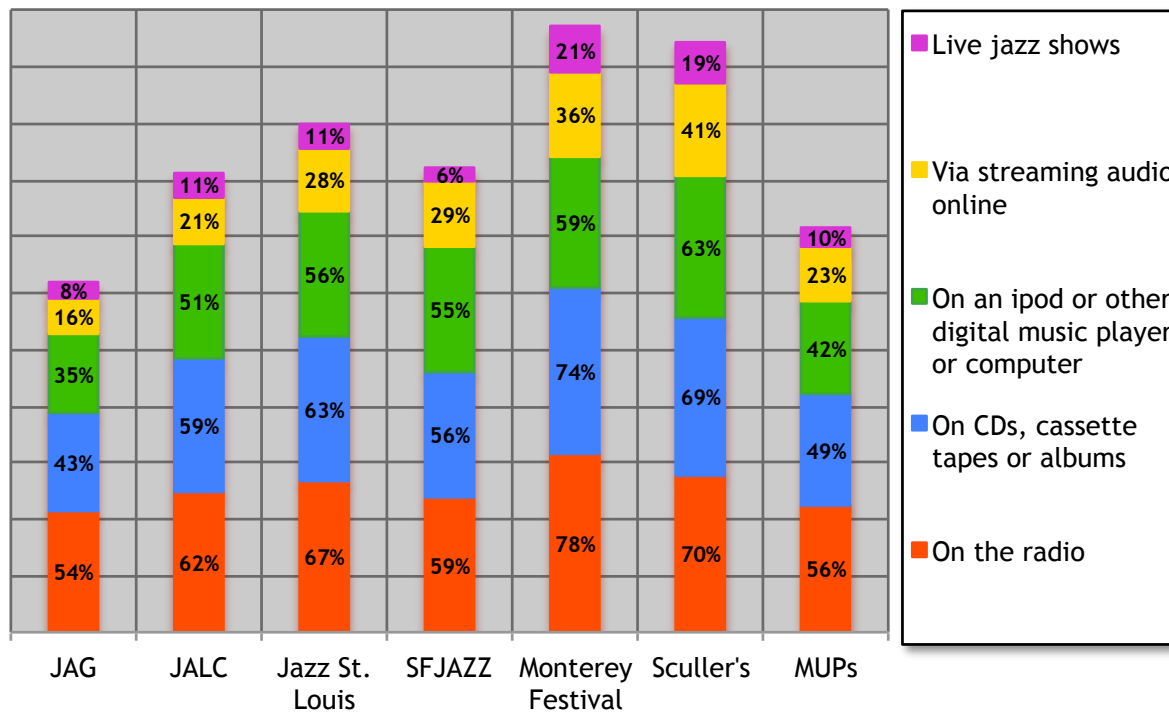


- Respondents were asked how often they listen to jazz via different media, as well as through live performance. The answer options were: never, seldom, monthly, weekly, and daily. The chart at left illustrates the aggregate percentages of respondents who reported “daily” or “weekly” frequency for each mode of consumption.
- While the percentage of respondents reporting frequent consumption of jazz is relatively consistent across the age cohorts (~60%), significant differences can be observed for the other modes of consumption.
- Younger buyers are much more likely to consume jazz via digital music player and via online streaming.
- Conversely, older buyers are more likely to consume jazz via conventional media – radio and CDs, etc.
- Results illustrate the fundamental shift in modes of consumption, and indicate the vital relationship that younger music consumers have with digital media.



Frequency of Jazz Consumption, by Partner

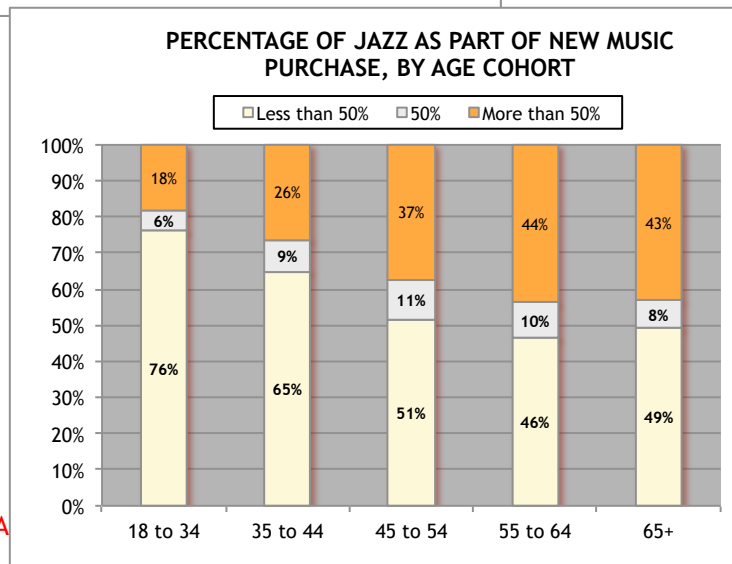
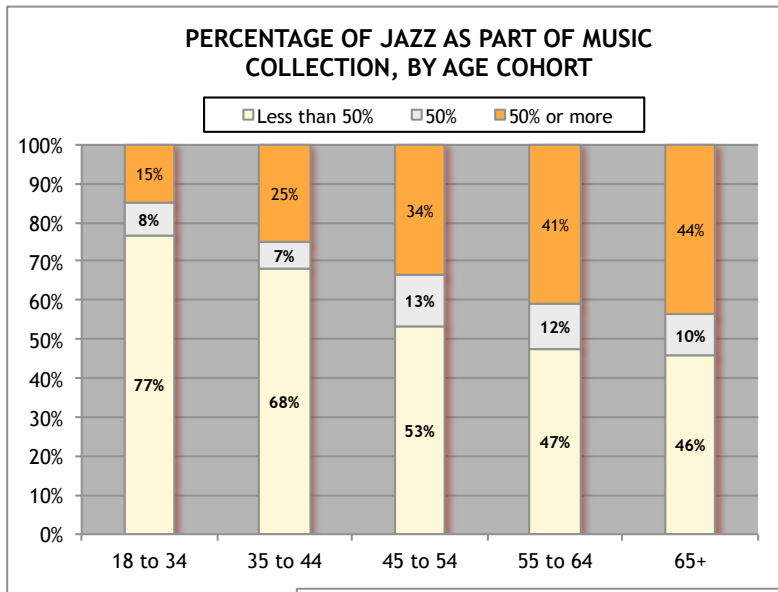
"HOW OFTEN DO YOU LISTEN TO JAZZ MUSIC...?" (PERCENT REPORTING WEEKLY AND DAILY, BY PARTNER)



- The larger finding here is that jazz buyers sustain their relationship with the art form by listening to radio, recordings and streaming audio. One might infer that live jazz cannot survive, much less grow, without a strong support system of jazz radio (both online and AM/FM) and recordings.
- Moreover, results suggest that jazz presenters could play a more central role in the daily lives of their patrons by supporting all forms of jazz listening, not just live performance.
- Across the seven partners, Monterey Jazz Festival and Sculler's patrons reported the highest levels of jazz consumption via all channels.



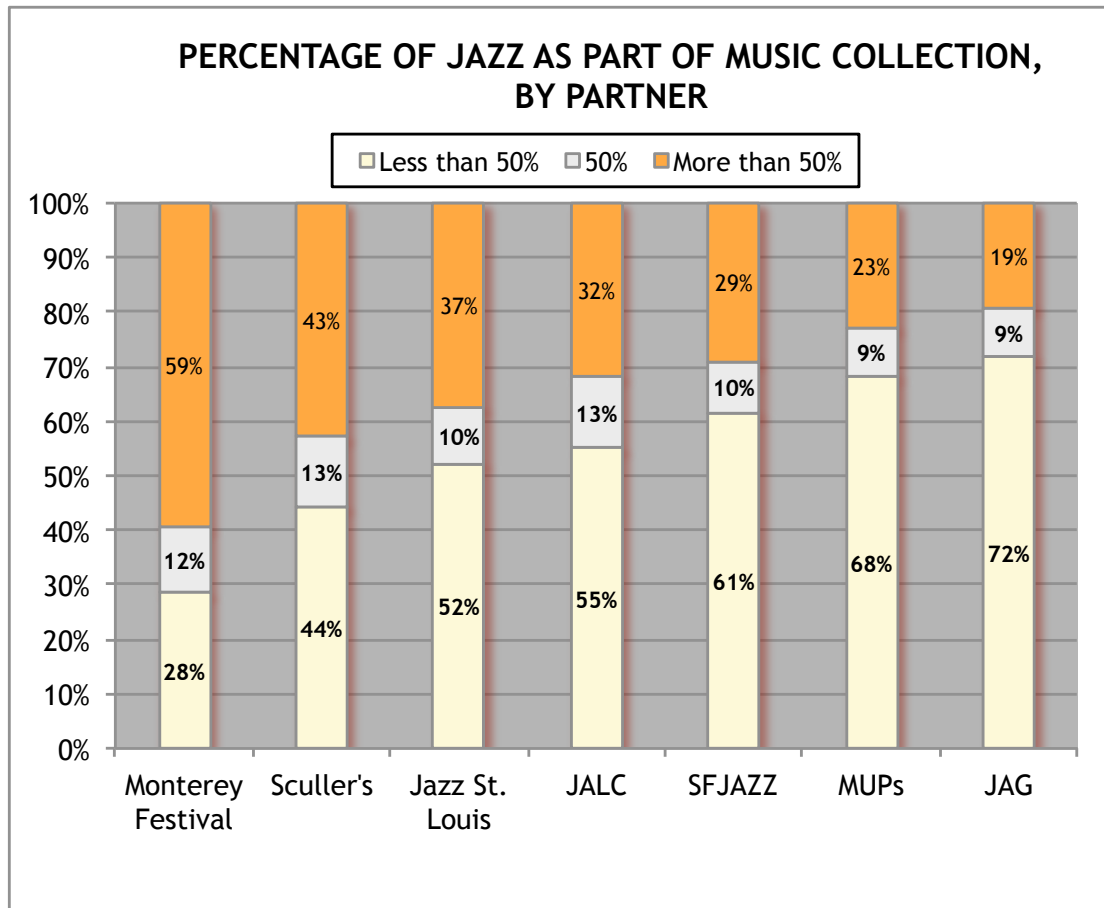
Jazz as a Proportion of Music Collection



- 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.
- As may be observed in the uppermost chart at left, younger buyers reported significantly lower percentages of jazz recordings in relation to their total music collection. Unfortunately, we do not know the absolute size of their collections.
- A similar pattern is observed with respect to acquisition of new music.
- Bear in mind that these are all jazz ticket buyers, and that younger buyers are more likely than older buyers to be actively engaged in playing jazz.
 - Assuming that overall consumption of music recordings among younger buyers is equal to or higher than consumption levels among older buyers, one might infer that younger jazz buyers have categorically more eclectic musical tastes. We have observed this phenomenon in other studies (Philadelphia Orchestra, 2008).
 - If this is true, what is implied about cultural institutions defined around a particular form of music?



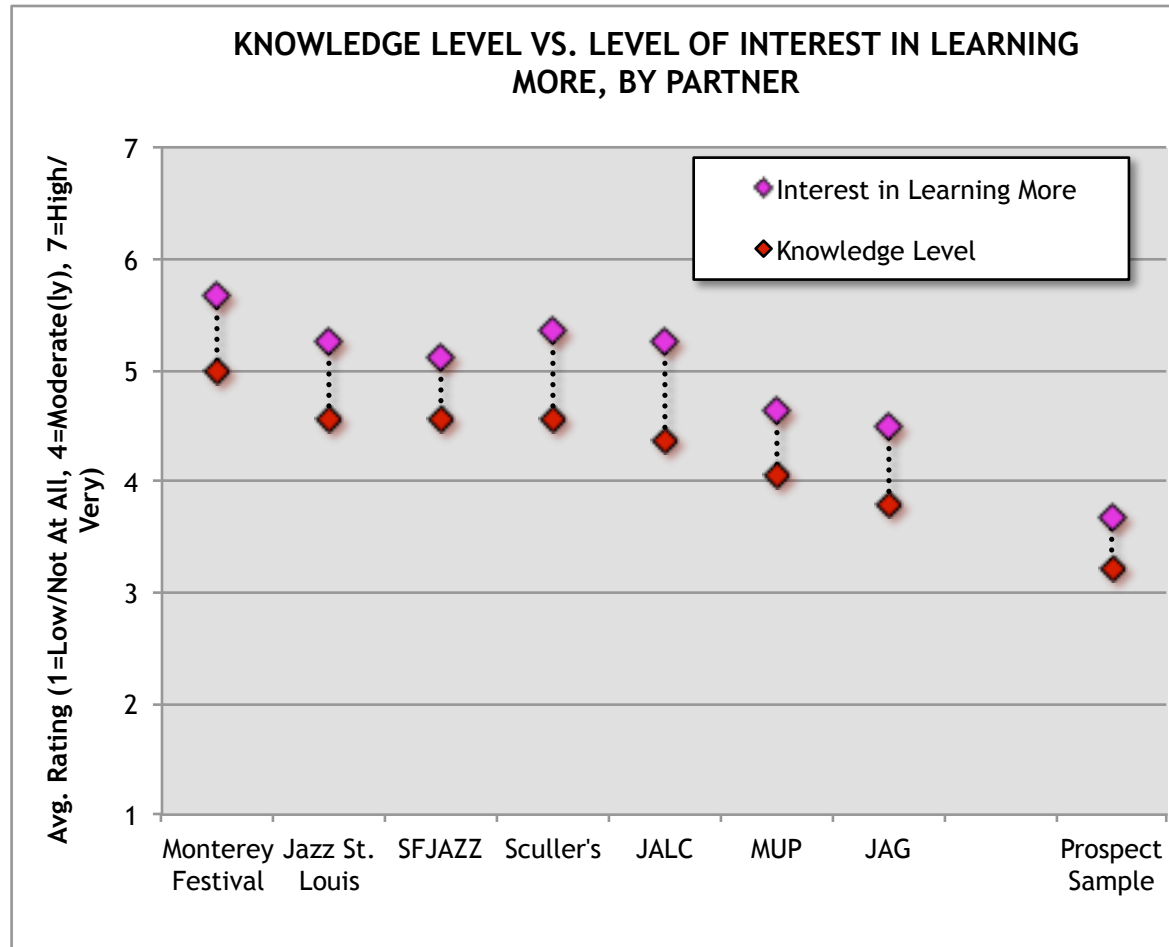
Jazz as a Proportion of Total Music Collection, by Partner



- This indicator varies substantially across the seven partners. Monterey Jazz Festival audiences own a larger proportion of jazz recordings compared to the other buyer groups, while Jazz Arts Group buyers own the small proportion of jazz recordings in relation to their total music collection.
- Very similar results were observed for acquisition of new music (not shown).



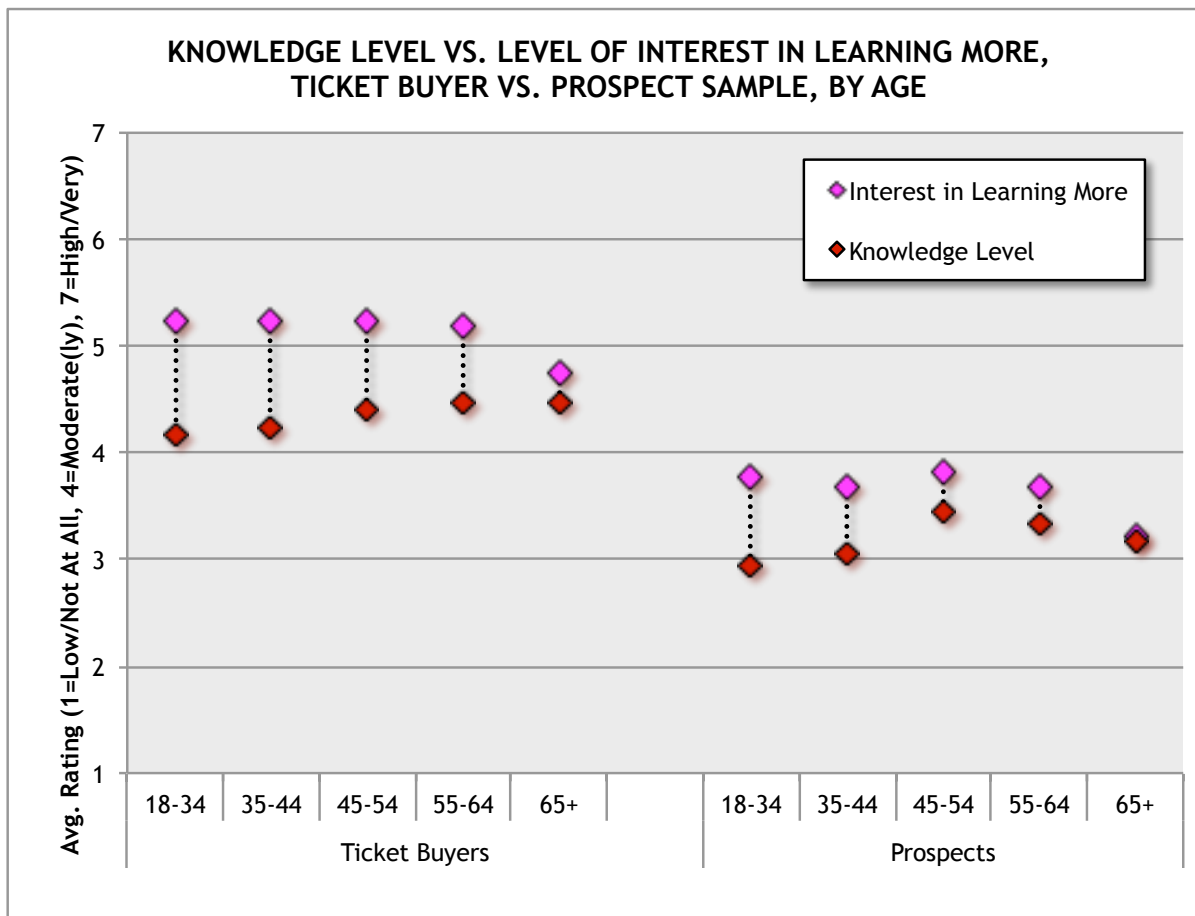
Interest and Knowledge Level, by Partner



- 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.
- As illustrated in the chart at left, average levels of interest in learning more about jazz exceed current knowledge levels for all partners. This is quite encouraging. The two indicators move together, which is somewhat intuitive (i.e., the more you know about jazz, the hungrier you are to learn more).
 - How can jazz presenters satisfy this desire to learn more?
- The other significant observation here is the wide range of knowledge levels across the seven partners.
 - What does this imply for messaging and communications strategies for presenters with less knowledgeable ticket buyers?
- As might be expected, prospects reported lower knowledge levels, on average, compared to buyers.



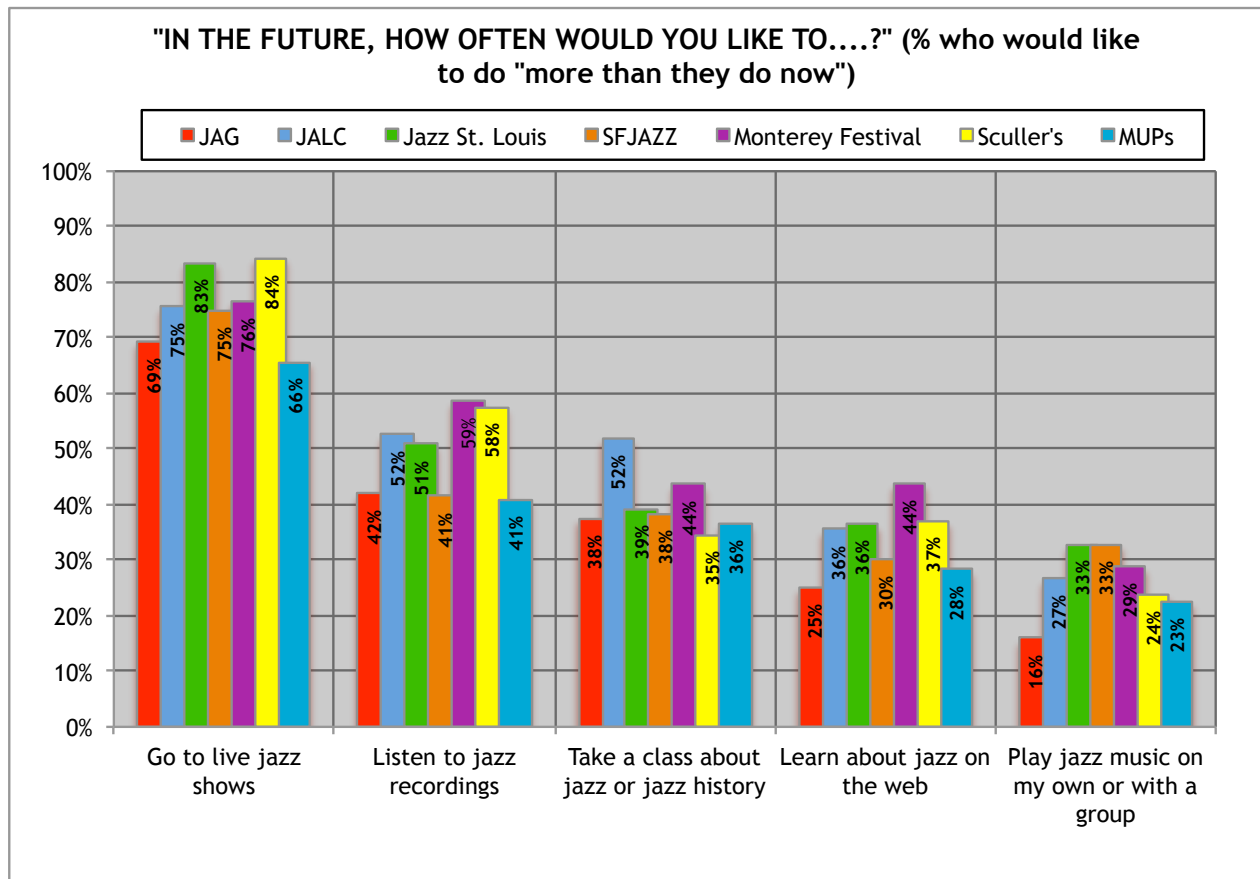
Interest and Knowledge - Ticket Buyer vs. Prospect Sample by Age



- As might be expected, knowledge levels increase somewhat with age, although the patterns is quite subtle.
- The gap between knowledge level and interest in learning more about jazz is highest amongst younger buyers, suggesting an opportunity to engage a younger audiences through education and exposure.
- Within the prospect sample, knowledge levels are highest for middle-age respondents (45-54), suggesting somewhat of a generational affinity for jazz.
- The key finding here is the lower knowledge levels amongst prospects, and the implied need for exposure to the art form.
 - In a regression analysis on the aggregated responses, knowledge levels were found to explain 19% of the variance in frequency of attendance, which is very significant. While this does not prove causality, one can reasonably assert that increased exposure to jazz through radio and recordings is a critical aspect of audience development.



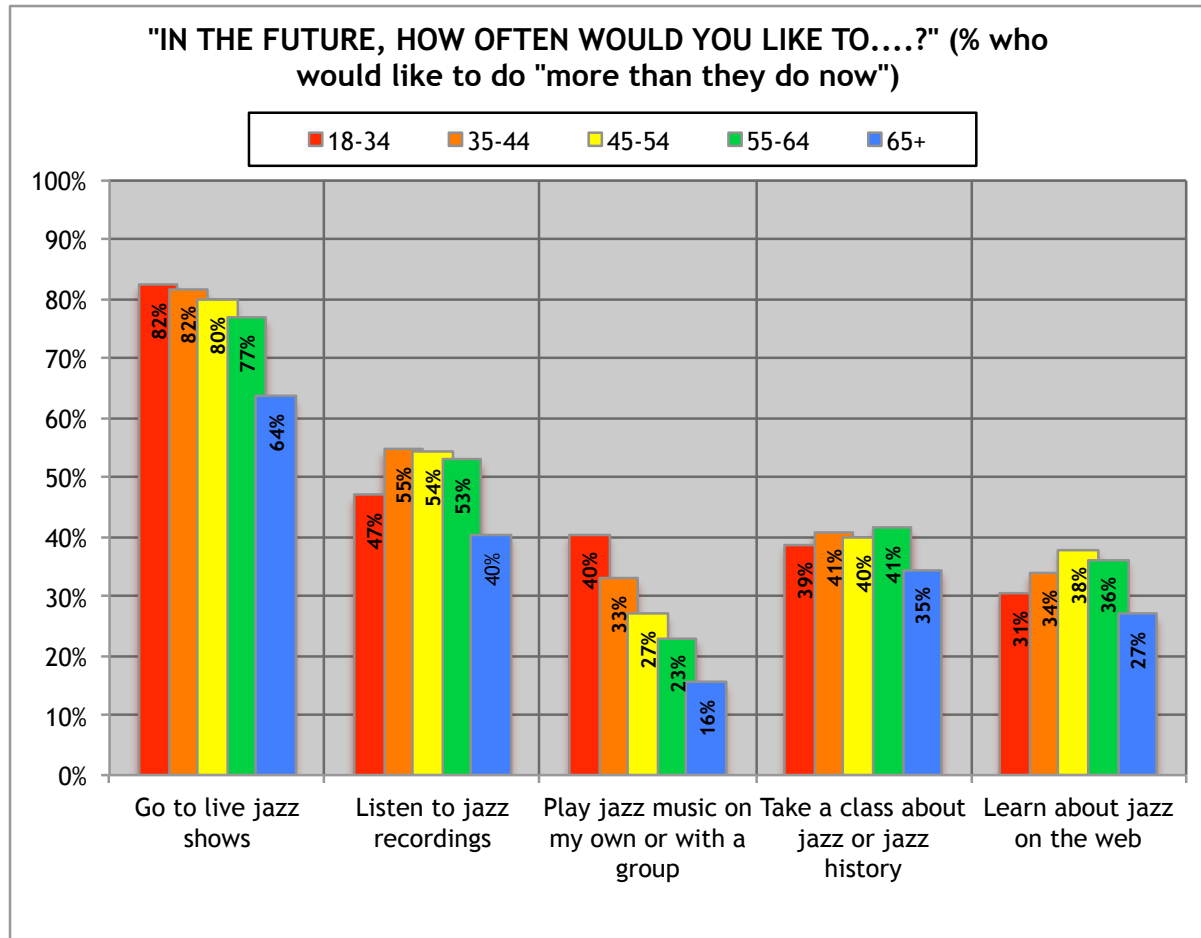
Interest in Doing Jazz Activities More Often in the Future, by Partner



- 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 partner.
- Approximately 70% to 80% of jazz buyers aspire to attend more jazz shows than they do now. While many barriers may stand between them and their aspirations, it is nevertheless significant that so many jazz buyers want to attend more jazz.
 - So, why aren't they? Is it a lack of supply in some markets? Lack of suitable venues? Lifestyle barriers? A larger problem with the quality of the experience?
- Also note the large percentages of jazz buyers who want to take a class about jazz or jazz history.



Interest in Doing Jazz Activities More Often in the Future, by Age Cohort



- Aspirational interest is equally high across the age cohorts, with the exception of the 65+ cohort.
- It is also significant to note that younger buyers are equally interested in taking a class about jazz or jazz history.
- Younger buyers are much more likely than older buyers to aspire to get more involved with jazz in a participatory sense (i.e., play jazz).
 - This is consistent with other findings, and suggests once again the need for active involvement opportunities (e.g., playing jazz), as well as curatorial involvement opportunities (e.g., downloading and organizing).

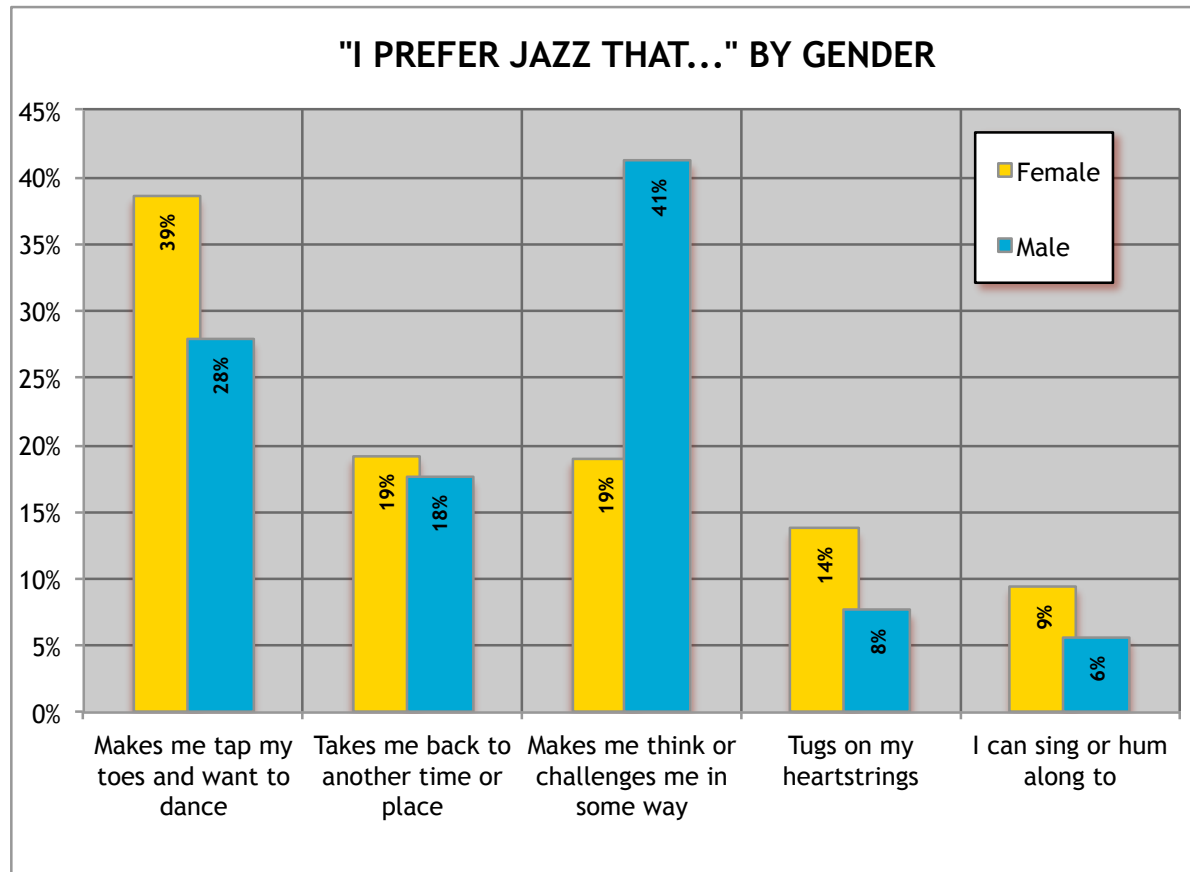




Jazz Preferences



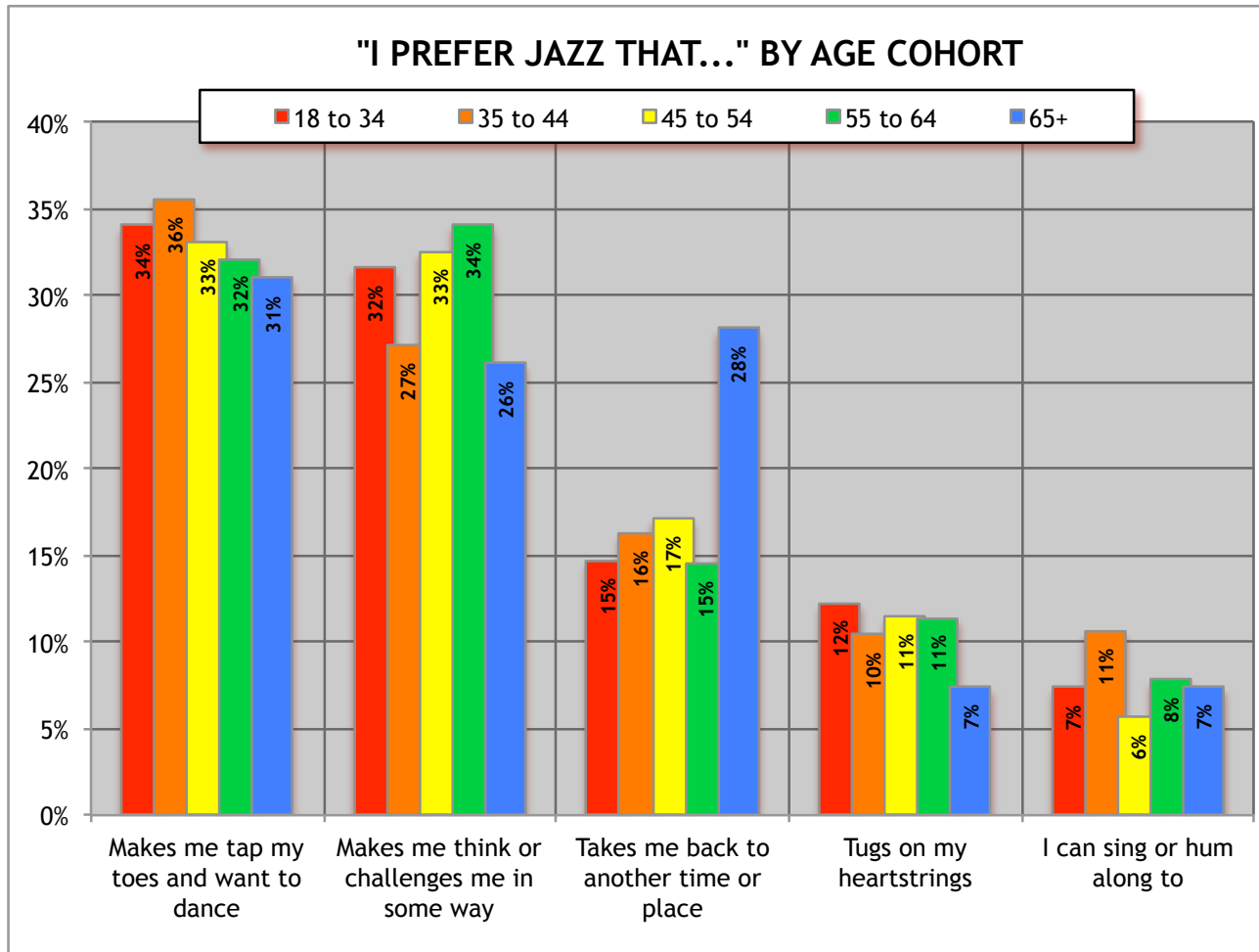
Desired Outcomes of Jazz Listening



- 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.
 - The differences between men and women is clear: women prefer listening to jazz that makes them 'want to dance' (39% to 28%) or 'tugs on their heartstrings' (14% to 8%), whereas men prefer more intellectual experiences that 'challenges them in some way' (41% to 19%).
- What are the implications for messaging about jazz artists, when elements within the audience value different things about jazz?



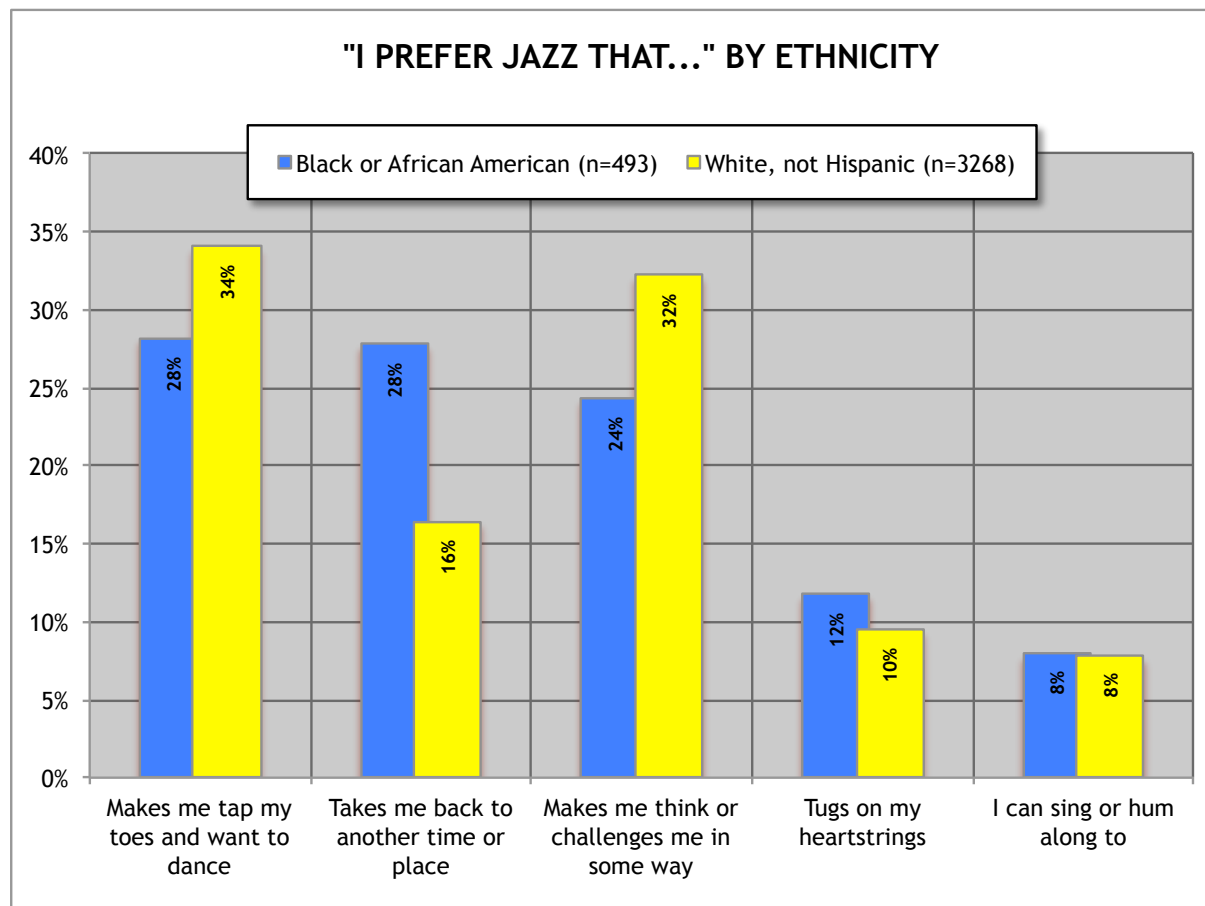
Desired Outcomes - By Age Cohort



- One-third of buyers across all ages prefer jazz that ‘makes me tap my toes and want to dance.’
 - If people want to move, what does this suggest about venues and settings? Concert formats? What does this mean to jazz artists?
- Another one-quarter to one-third prefer intellectual, or challenging experiences.
- Not surprisingly, jazz buyers 65 and older are more sentimental in their tastes, attracted to jazz that ‘takes me back to another time and place.’



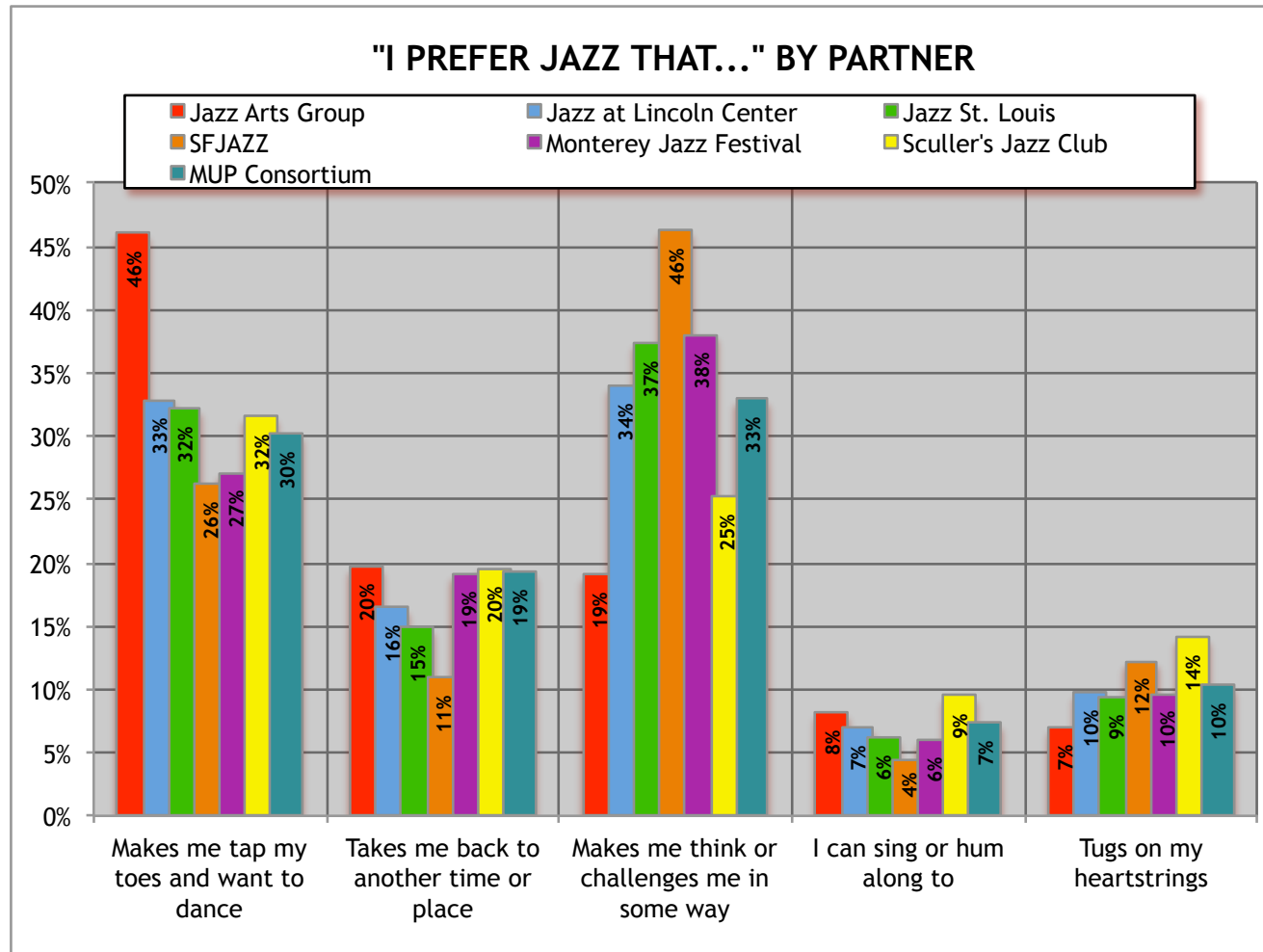
Desired Outcomes, by Ethnicity



- Subtle differences are also evident between White respondents and African American respondents. (other racial/ethnic cohorts are not reported here due to small sample sizes).
- For example, White jazz buyers are more likely than African American buyers desire jazz experiences that make them want to move (34% vs. 28%, respectively).
- On the other hand, African-American jazz buyers are more likely than Whites to seek jazz experiences that ‘take me back to another time and place’ (28% vs. 16%, respectively). This significant difference is not explained by age differences, since the average ages of Whites and Blacks in the sample are nearly identical. One might infer from this finding that African American jazz buyers have a strong desire to connect with their cultural heritage.
- White respondents are more likely than Black respondents to desire jazz experiences that are intellectually challenging (32% vs. 24%, respectively).



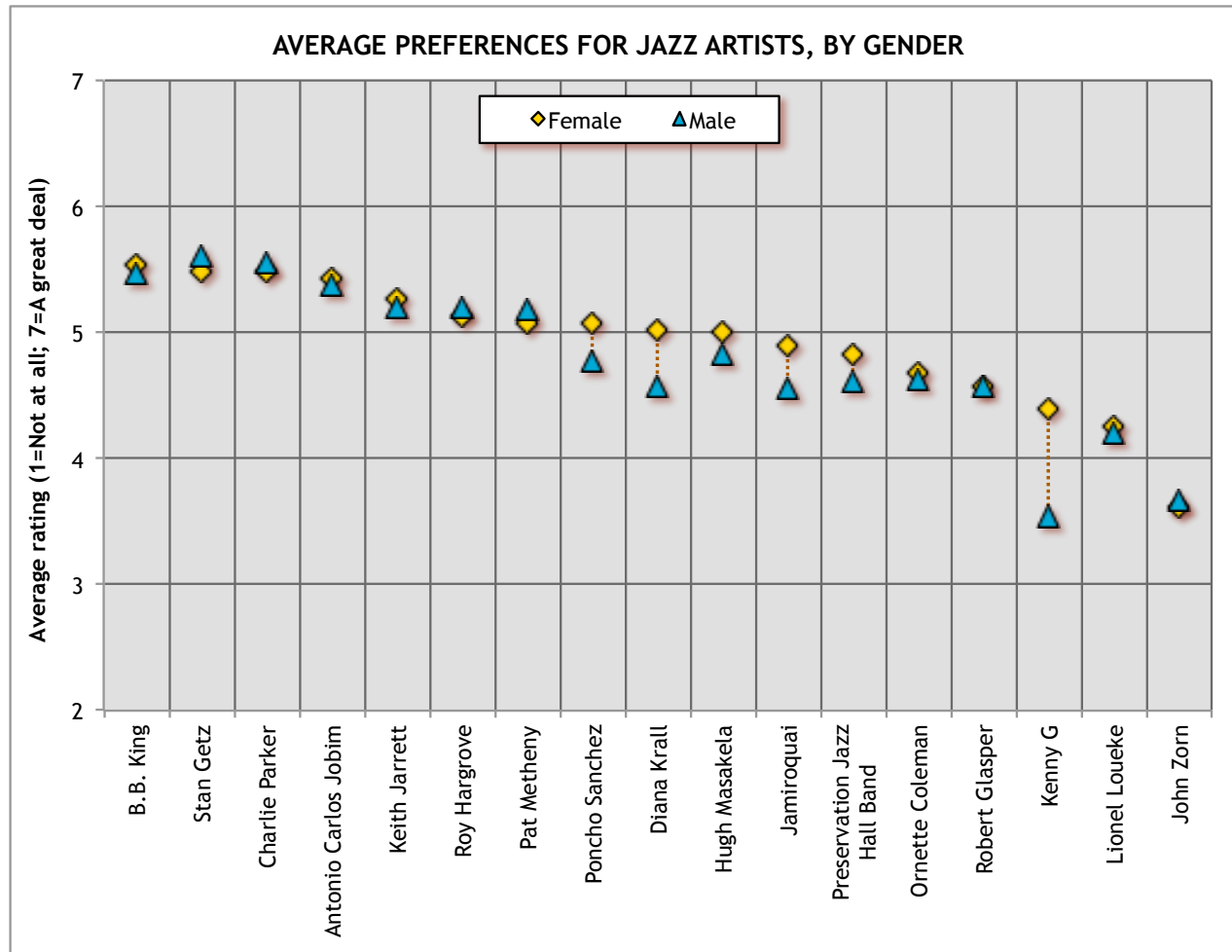
Desired Outcomes, by Partner



- Desire for particular outcomes by partner reflects the demographic make-up of buyers. For example, Jazz Arts Group buyers are more likely to be female (52% compared to 46% of the aggregate buyer sample), and are significantly more likely to seek jazz that ‘makes me want to dance.’
- 46% of SFJAZZ buyers want to be intellectually challenged, more so than others.
- Note that challenging jazz experiences appeal to between 33% and 46% of all buyer samples with the exception of Sculler’s (25%) and Jazz Arts Group (19%), suggesting that these buyers groups are substantially less intellectually oriented.



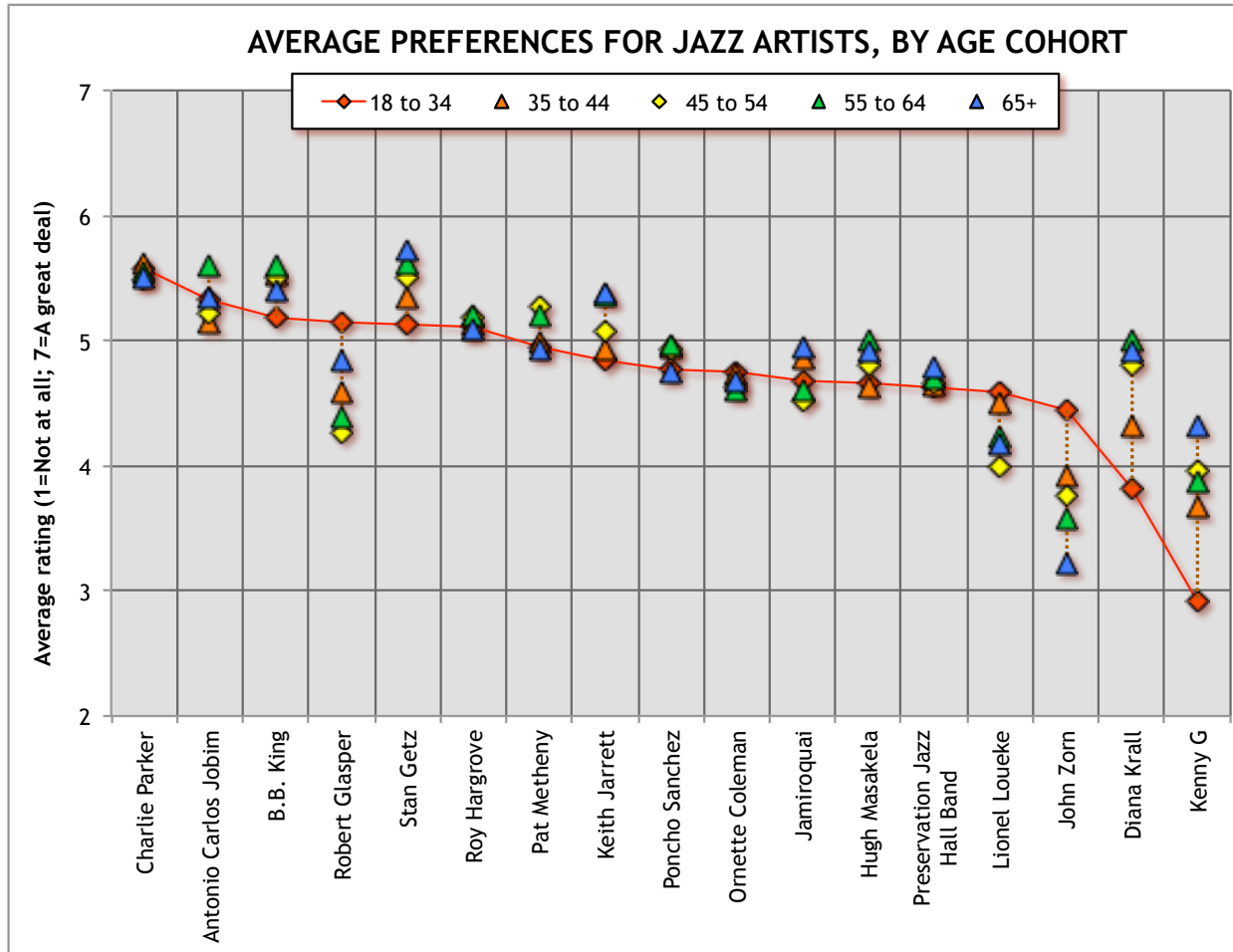
Preferences for Different Jazz Artists



- 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. 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 shows results by gender. The average rating is 4 (on a scale of 1 to 7). Note the scale on this graph ranges from 2 to 7.
- Across the 17 artists, preference levels are highest for B.B. King, Stan Getz and Charlie Parker, and lowest for John Zorn.
- Not surprisingly, women like Diana Krall more than men (she is the only female artist on the list), as well as Poncho Sanchez, Jamiroquai and Kenny G. In fact, women are 25% more likely than men to enjoy Kenny G.
 - Remember that women prefer jazz that makes them want to dance or that tugs at their heartstrings. Poncho Sanchez could be considered an artist whose music inspires movement, and Kenny G. is associated with heartfelt smooth jazz.



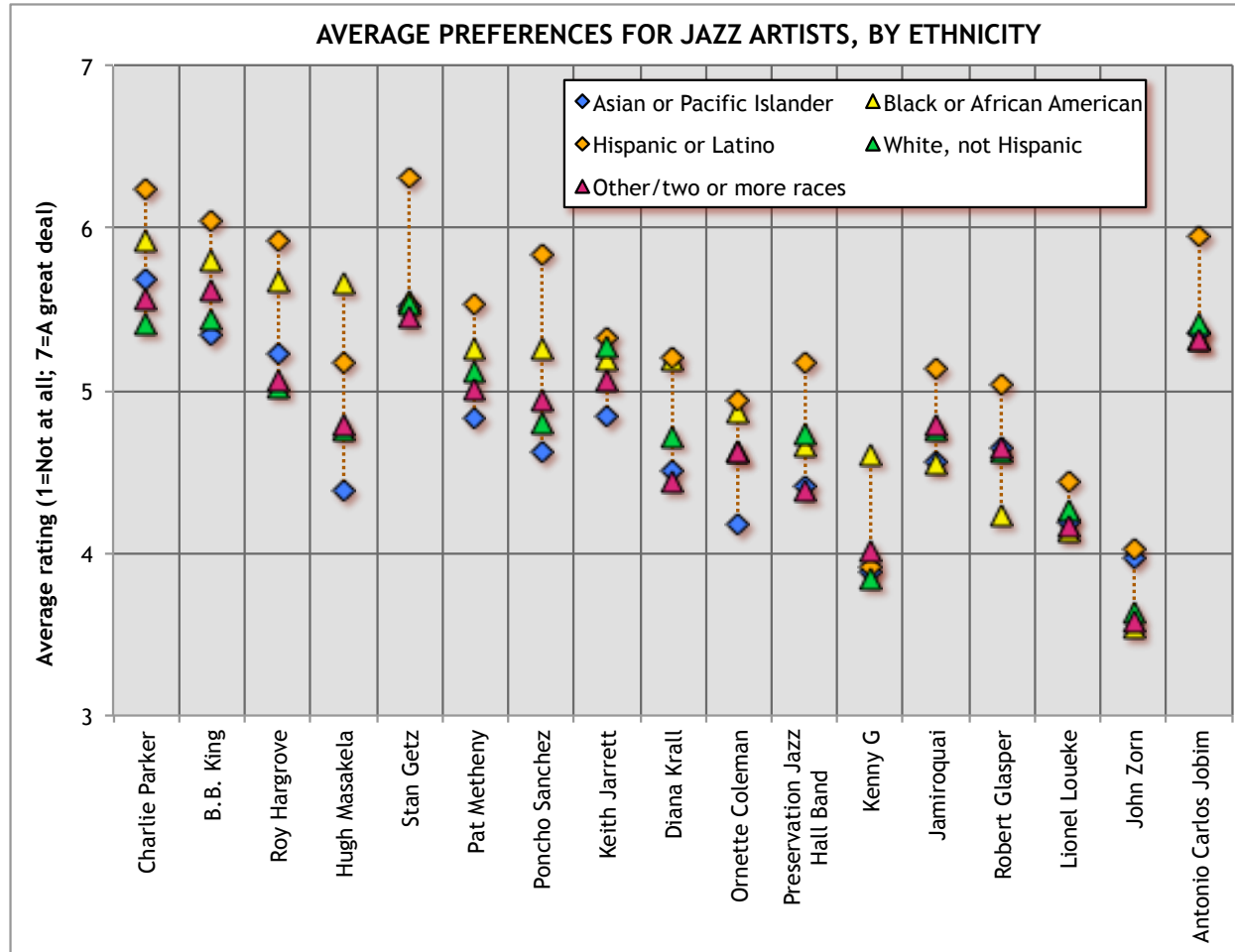
Preferences for Different Jazz Artists, by Age Cohort



- As noted earlier, younger buyers are less likely to define their tastes around any one style of music. Rather, they are typically driven by an interest in particular artists. Analysis of preference by age turns up some interesting results:
- Charlie Parker is the most preferred artist amongst 18 to 34 year olds (among those who know his music).
- Older buyers, age 55 and over, are more likely to enjoy Stan Getz, Keith Jarrett and Diana Krall.
- Younger-leaning artists, like Robert Glasper and John Zorn hold greater appeal for younger buyers.
- Note especially the dramatic drop in preference for Kenny G. and Diana Krall among 18 to 34 year olds.
 - If jazz presenters want to increase attendance among young adults, how can they use this information to better align their programming with the tastes of young audiences?
 - For example, websites and online music services (e.g., Pandora) recommend new artists based on existing tastes. What kind of recommendation program, based on artist (i.e., not style) preference, would encourage young audiences to try unfamiliar artists?



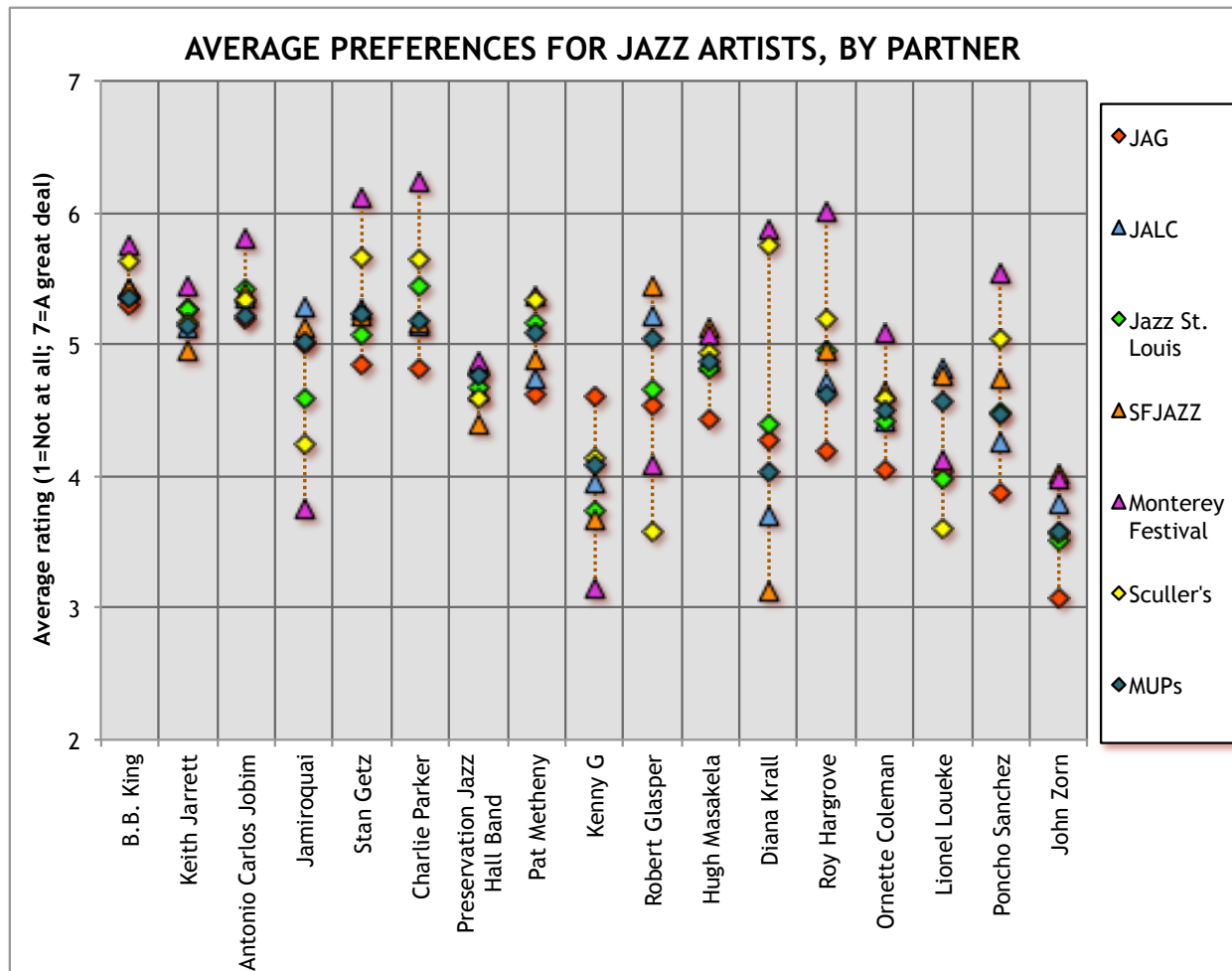
Preferences for Jazz Artists, by Ethnicity



- Preference results by ethnicity reveal and underscore expected patterns:
- African-Americans are much more likely than other groups to like Hugh Masakela (African crossover artist), and other African-American artist.
 - It is not clear why African-Americans are more likely than other groups to enjoy Kenny G. Possibly, this may be due to the influence of women in the sample (52% of African American respondents were women).
- Hispanics, on average, are more enthusiastic about almost all the artists than other groups, suggesting a pro-music cultural bias. In particular, they are significantly more likely to enjoy Latin-based music and artists, like Stan Getz (famous for introducing bossa nova style and Antonio Carlos Jobim to American audiences), Poncho Sanchez and Jobim.



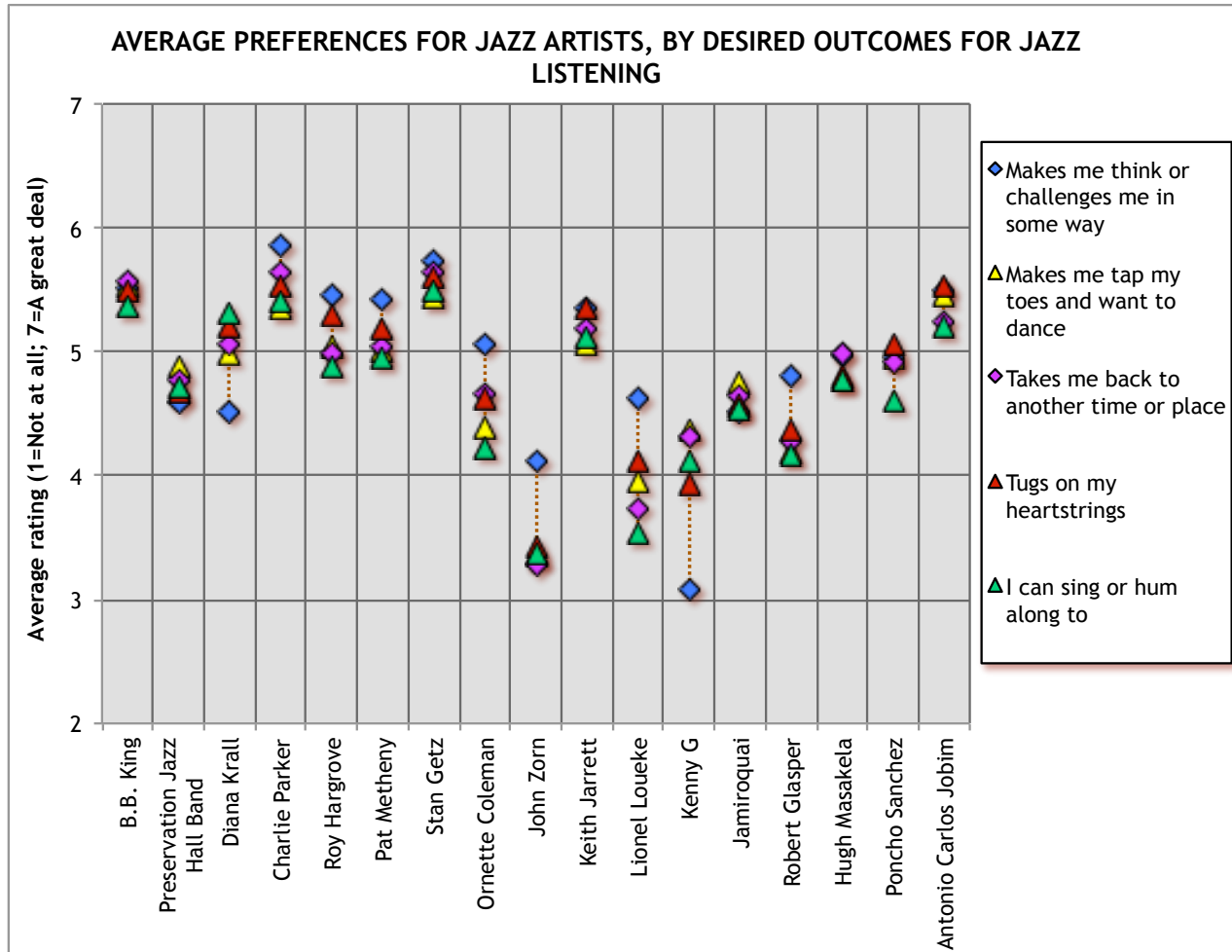
Preferences for Jazz Artists, by Partner



- Artist preferences by partner underscore how programming helps shape taste. For example, SFJAZZ recently presented Robert Glasper as part of their 2010 Spring Season. Their buyers also rated Glasper higher on average than any other artist on the list.
- The 2010 Monterey Jazz Festival lineup included Roy Hargrove. The online survey was administered just prior to the Festival in September, by which time many had already purchased tickets.
- These findings illustrate the critical role that jazz curators and their organizations play in shaping public tastes. In selecting specific artists to present, curators are, essentially, re-shaping tastes and, in a sense, engineering the aesthetic development of the public (or at least of the jazz-going public). In other words, exposure builds preference, and thereby re-shapes taste.
 - What can jazz presenters do to drive higher preference levels for jazz artists? Are jazz presenters really in the business of presenting concerts, or in the business of aesthetic development? If the latter, what does this suggest with respect to mission and programs?



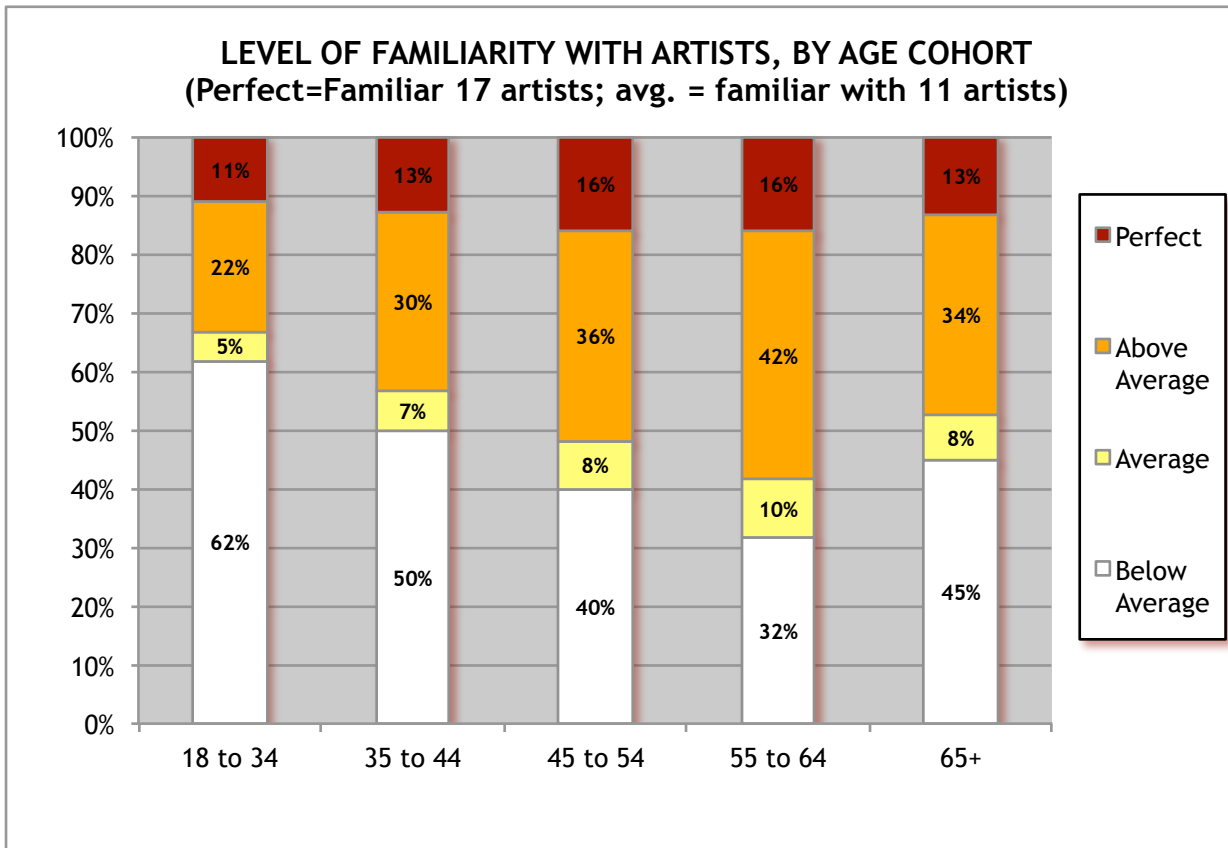
Preferences for Different Artists, by Desired Outcomes



- Further analysis was done comparing desired outcomes to artist preferences.
- Artists to ‘sing or hum along to’ are most likely to be B.B. King, Diana Krall, Charlie Parker, Stan Getz and Jobim.
- Artists most highly associated with “intellectual” outcomes are Charlie Parker, Stan Getz, Ornette Coleman and Robert Glasper.
- Younger-leaning artists like John Zorn, Lionel Loueke, and Robert Glasper are significantly more likely to be associated with intellectual outcomes. Note the much lower average ratings for Kenny G. and Diana Krall around intellectual outcomes.



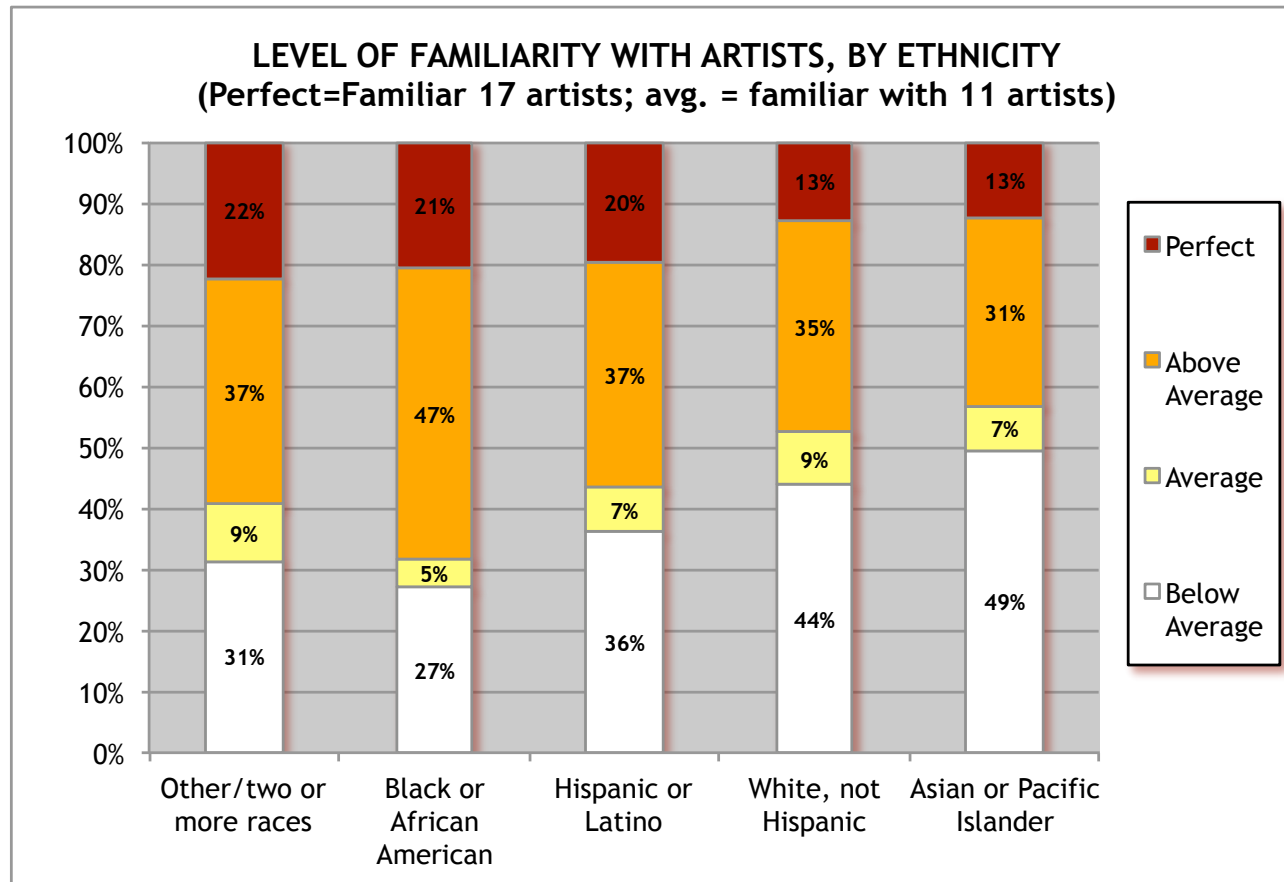
Overall Familiarity with Artists, by Age Cohort



- As earlier noted, respondents were allowed to “opt-out” of indicating a preference for any artist with whom they were unfamiliar. This allows 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 age cohort. “Perfect” familiarity occurs when a respondent is familiar with all 17 of the listed artists.
- As would be expected, familiarity increases with age, peaking at the 55 to 64 age cohort (16% perfect and 42% above average). Over their lifetimes, people become familiar with a broader range of artists.
 - The question becomes, how can this process be accelerated?
 - In light of the fact that 40% of respondents 18 to 34 expressed an interest in studying music history or music appreciation, this finding underscores the need for new and innovative programs that simply introduce and familiarize younger audiences with different jazz artists.



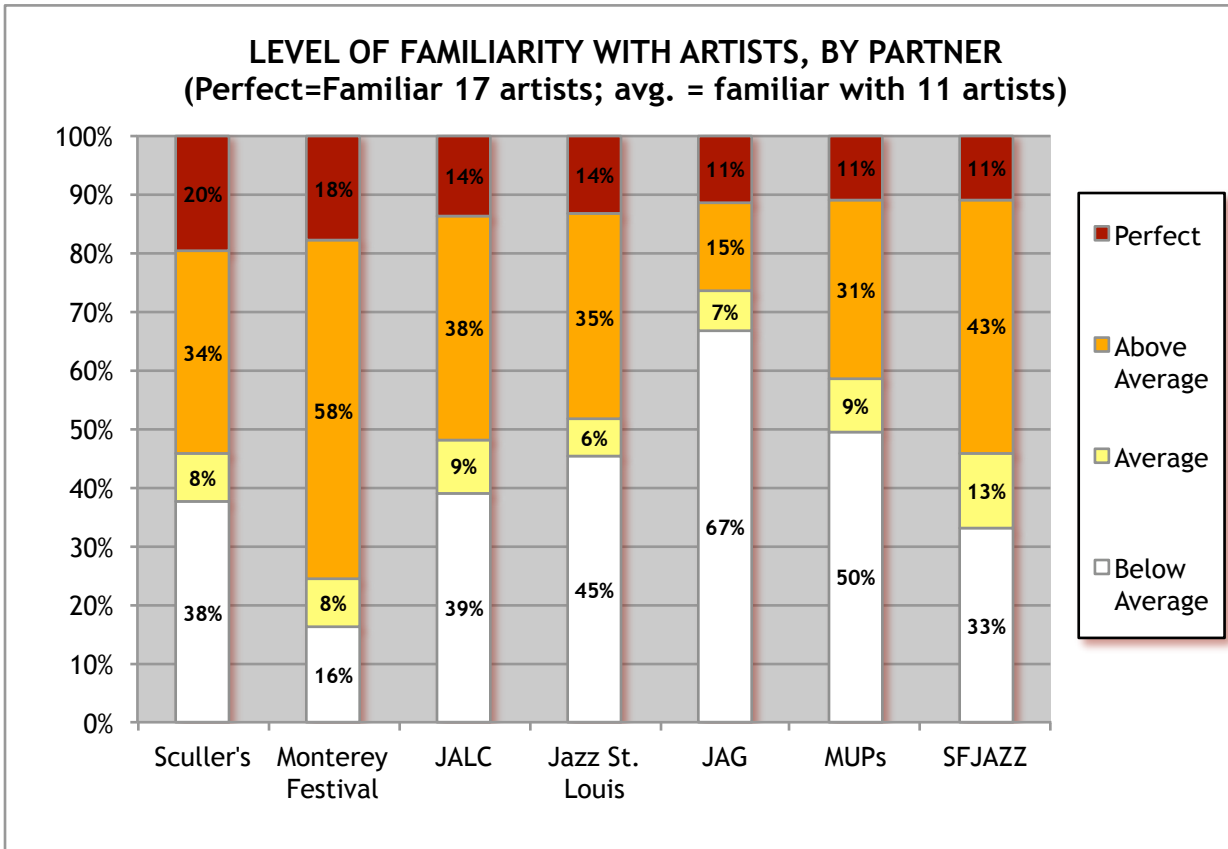
Overall Familiarity with Artists, by Ethnicity



- Analysis of familiarity levels by ethnicity suggests that African-American jazz buyers are most familiar with the 17 jazz artists, on average, compared to the other racial/ethnic cohorts.
- Asians are least knowledgeable. This might be explained, in part, by the younger age skew of Asian respondents (25% were under 34 years old).



Overall Familiarity with Artists, by Partner



- Analysis by partner reveals dramatic differences across the seven partners. For example, Monterey Jazz Festival buyers are significantly more familiar with the 17 listed jazz artists than others buyers.
- SFJAZZ, Sculler's, Jazz at Lincoln Center and Jazz St. Louis buyers are second in level of familiarity.
- More than anything, these results reflect the programming histories of these jazz presenters (e.g., Jazz Arts Group has only a modest jazz presenting program, and offers regular concerts by the Columbus Jazz Orchestra).



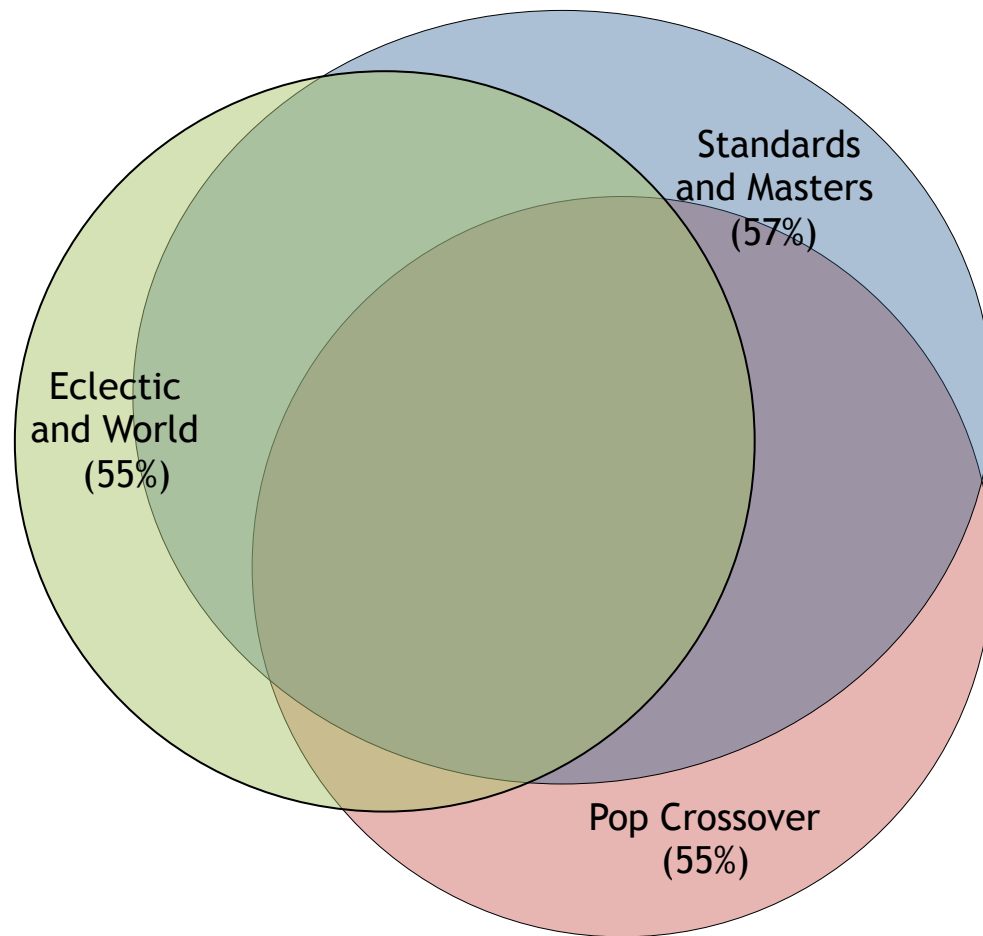
Underlying Dimensions of Jazz Preferences

FACTOR ANALYSIS OF 23 ARTIST PREFERENCES	Rotated Component Matrix(a)		
	Component		
	1	2	3
	Eclectic and World	Standards and Masters	Pop Crossover
John Zorn	0.78	0.27	
Keith Jarrett	0.52	0.38	
Lionel Loueke	0.85		
Jamiroquai	0.75		0.34
Robert Glasper	0.88		
Hugh Masakela	0.58	0.34	0.27
Poncho Sanchez	0.54	0.53	
Antonio Carlos Jobim	0.51	0.27	
Preservation Hall Band		0.46	0.38
Diana Krall		0.65	
Charlie Parker		0.82	
Roy Hargrove	0.55	0.58	
Pat Metheny	0.30	0.63	
Stan Getz		0.82	
Ornette Coleman	0.47	0.67	
B.B. King		0.40	0.68
Kenny G			0.83

- An exploratory factor analysis was conducted on preference data for 17 different jazz artists to uncover underlying dimensions of preference and connections between artists. This analysis is necessarily limited by the 17 artists.
- Missing values were not allowed into the analysis. Respondents who weren't familiar with an artist (i.e., marked "don't know" on the survey) were not included in this analysis. Thus, only 860 respondents were able to be classified by the preference factors. Subsequent analyses by age cohort and partner are, therefore, based on smaller and unstable sample sizes. However, it is still useful to review findings, as it provides a framework for discussion and understanding of jazz preference.
- Results exposed three factors: 1) Eclectic and World – a combination of youth-leaning cross-genre artists like John Zorn and Jamiroquai; 2) Standards and Masters – artists that in many ways represent the "canon" of jazz masters; and 3) Pop Crossover – artists that have, over time, grown to appeal to a broad mainstream and pop-based audience. These three factors are not mutually exclusive – some respondents are associated with two or three factors, just as some of the artists are associated with two or three of the factors. For example, Roy Hargrove loads almost equally on the Fusion and Standards and Masters factors, as does Poncho Sanchez.



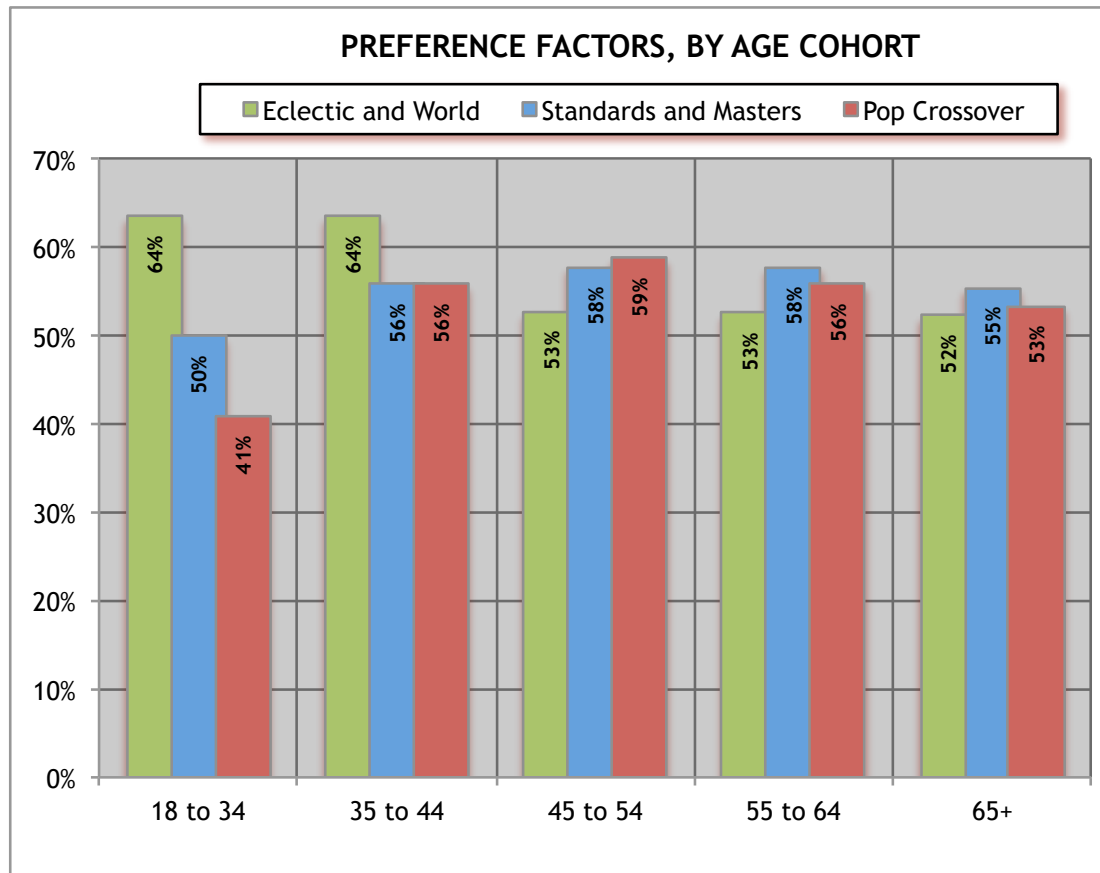
Relationships between Jazz Preference Dimensions



- The Venn diagram at left illustrates the approximate prevalence of each preference factor. Overall, each preference factor is associated with approximately half of all buyers (note that buyers belong to multiple groups). Standards and Masters are slightly more prevalent.
- Overall, the factors overlap between 70% and 85%. This signifies that many buyers associate with multiple preferences, and underscores other findings regarding the breakdown of preference labeling (i.e., association with one distinct style above others).
 - How will jazz groups communicate with an increasingly interconnected set of preferences?



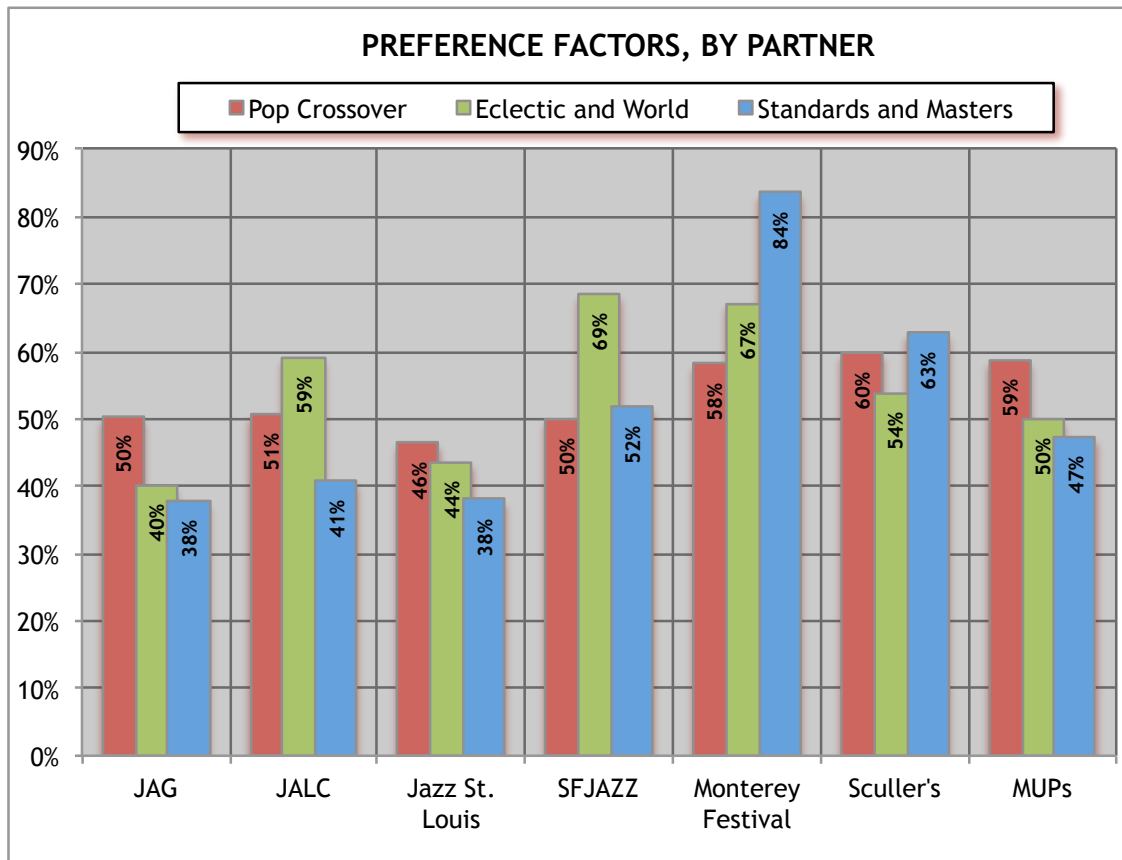
Preference Factors - By Age Cohort



- The chart at left shows the prevalence of association with each preference factor by age cohort.
- Overall, each age group shares preferences equally, with the only distinction in the cohort of younger buyers who are more likely to be associated with Eclectic and World artists (64%). Conversely, 18 to 34 year old buyers are least likely to be associated with the Pop Crossover factor (41% compared to 50% or more of other age cohorts).



Preference Factors - By Partner



- Results by partner, similar to other findings, follow age distribution and programming.
- SFJAZZ, Monterey Jazz Festival, and Jazz at Lincoln Center buyers are most likely to associate with Eclectic and World artists.
- About eight in ten Monterey Jazz Festival buyers associate with Standards and Masters. These buyers are also the most knowledgeable of all partner groups.

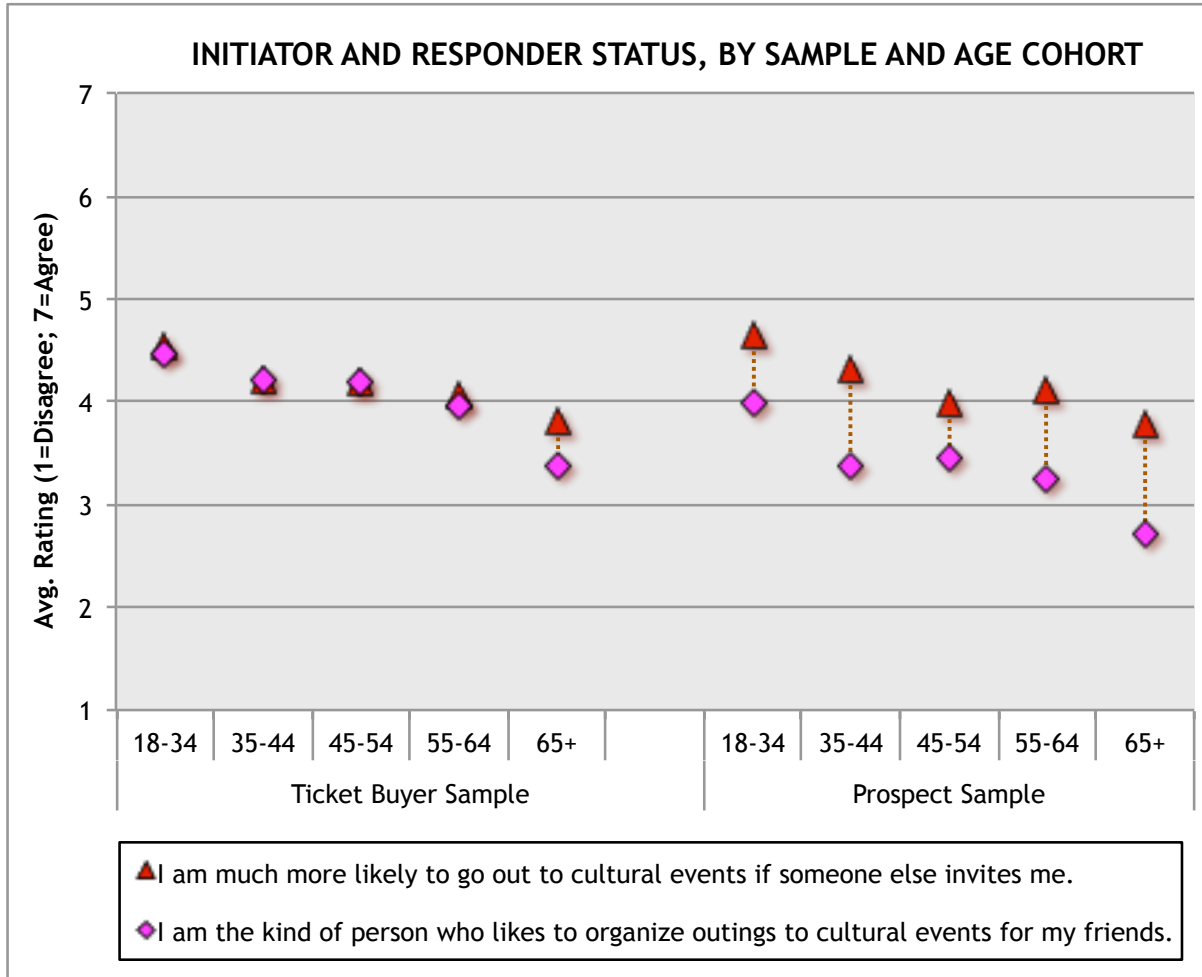




Core Values, Initiator/ Responder Status, and Technology Use



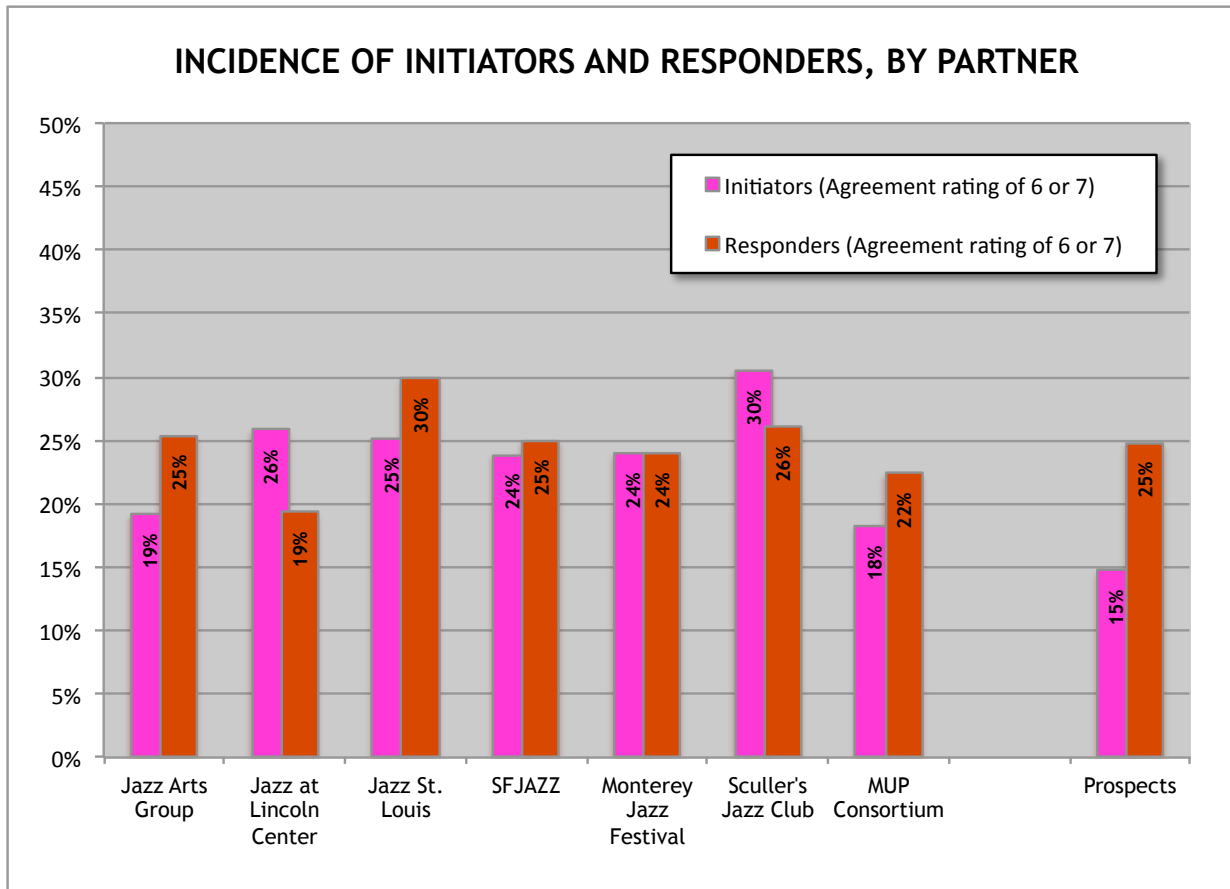
Initiator and Responder Status -Ticket Buyers vs. Prospects, By Age



- Respondents were asked to indicate their level of association with two statements designed to identify “Initiators” and “Responders.” These are not mutually exclusive typologies although they are negatively correlated (-.34).
 - It is quite interesting to note that ticket buyers are as likely to be Initiators as they are to be Responders. This suggests that many existing buyers are susceptible to social stimuli (i.e., with the right invitation, their frequency of attendance might increase).
 - In the general population, Responders outnumber Initiators 3 to 1 (Knight Foundation/Audience Insight, 2002)
- On average, prospects are more likely to be responders, regardless of age. This is not surprising, since most of this sample was gathered through online surveying of non-buyer groups.
 - Social incentives will play a large role in audience development efforts targeted at prospects.
- For both ticket buyers and prospects, 18 to 34 year old respondents are most likely to be Initiators.
 - Marketing programs that reward patrons for bringing their friends should be geared towards younger buyers and prospects.



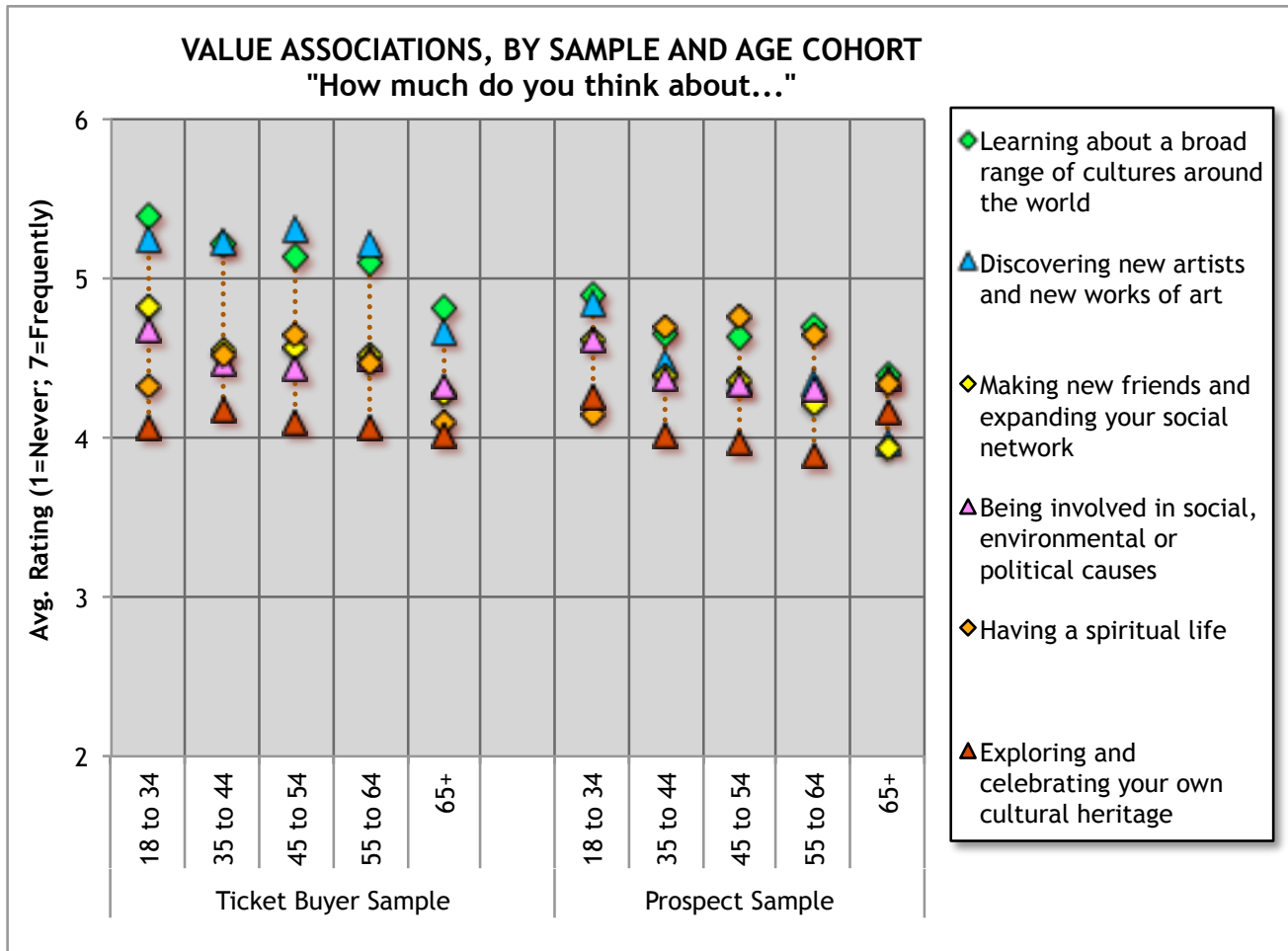
Prevalence of Initiators and Responders, by Partner



- To gain a clearer picture of the representation of Initiators and Responders in the seven samples, 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)).
- Roughly 20% to 25% of buyers across the seven sites could be described as “Initiators.”
- The figure is highest for Sculler’s and lowest for the MUP sample and JAG.
 - Ultimately, a data variable indicating “Initiators” should be incorporated into ticketing databases, so these individuals can be identified and engaged and rewarded for doing what they instinctively love to do.
 - What offers or marketing programs could be constructed to engage these people?
 - For prospects, results suggest a focus on socially transmitted invitations.



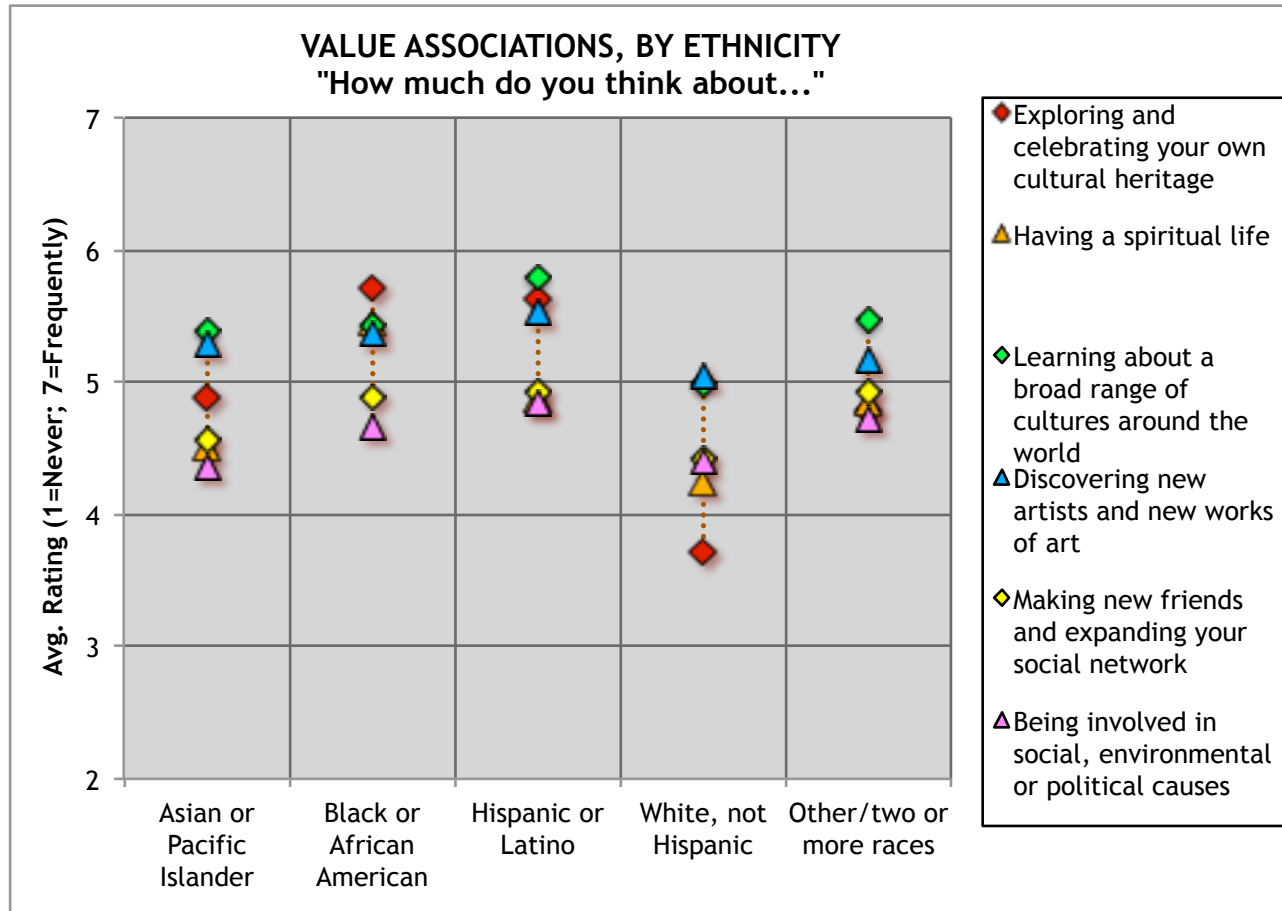
Value Associations, by Age Cohort



- In order to gain a more general sense of their underlying values, respondents were asked how often they think about six different things. These variables will play a key role in the segmentation analysis.
- Overall, two value associations are strongest for ticket buyers across all age cohorts: “discovering new artists and new works of art,” and “learning about a broad range of cultures around the world.” Both of these values relate closely to mission-driven jazz programming, and suggest an appetite for learning about the music of other cultures.
- Prospects more connected to spiritual values, and less connected, on average, to discovering new artists, as might be expected.
- Younger ticket buyers associate most strongly with ‘learning about a broad range of cultures,’ underscoring a general affinity towards world cultures and thus world or international artists.
- As expected, younger respondents (18 to 34) are also more likely to associate with “making new friends,” suggesting the importance of their social environment, and also reflecting their higher likelihood of being single. This is especially true for Prospects.



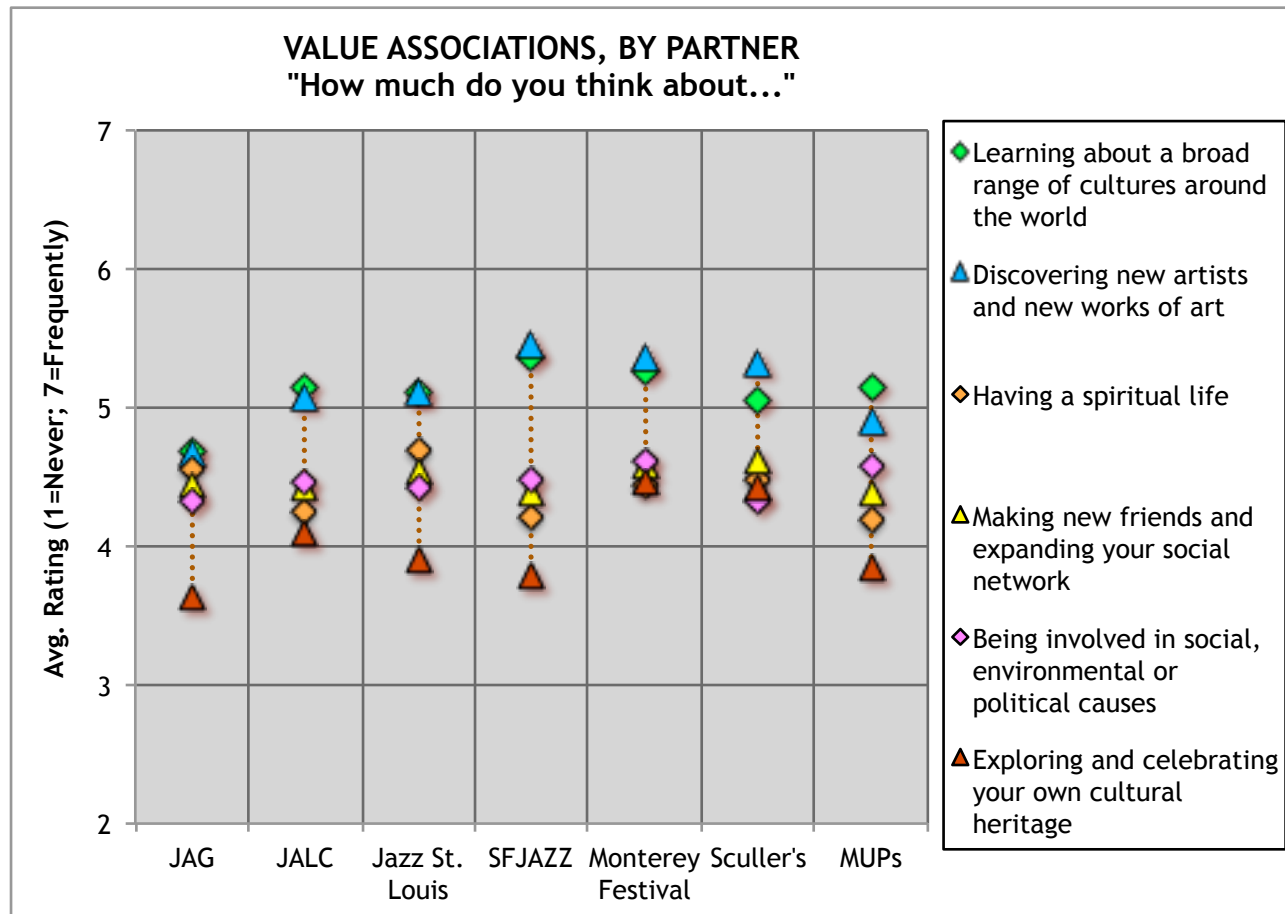
Value Associations, by Race/Ethnicity



- As might be expected, strong relationships were observed between respondents' race/ethnicity and their level of association with "exploring and celebrating your own cultural heritage." This value association is stronger than all the other value associations for African Americans, and also strong for Hispanics.
- Contrariwise, respondents who identified as "White/Not Hispanic" are significantly less likely to associate with this value.
- Note also that the levels of association with "learning about a broad range of cultures around the world" are generally higher for respondents of color, and especially for Hispanics.
- An analysis of variance test suggests that race/ethnicity explains roughly 15% of the variance in the level of association with "exploring and celebrating your own cultural heritage."
 - This points to the vital role that culturally-specific programming can play in allowing communities to learn about, reflect upon, their cultural heritage.



Value Associations, by Partner



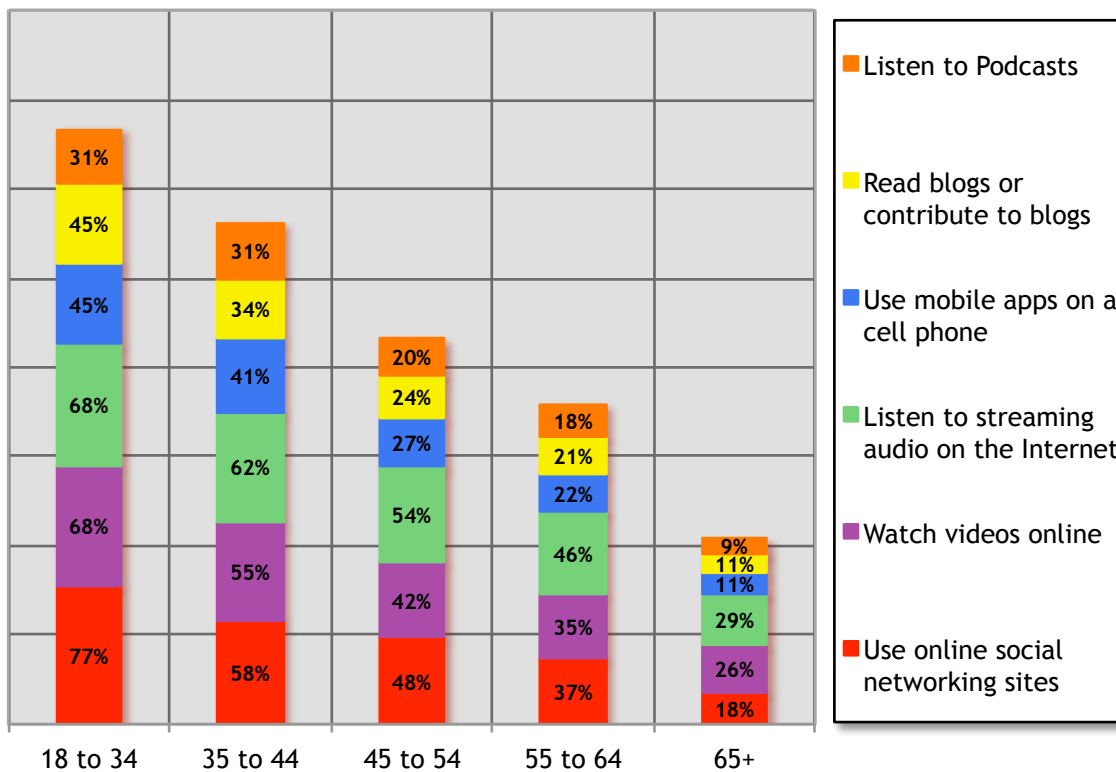
- Subtle differences can be discerned with respect to variations in value associations across the seven partners.
- For example, SFJAZZ buyers are most likely to identify with the two learning values, while JAG buyers are least likely to associate with this value.
- Monterey Jazz Festival and Sculler's buyers are more likely than other buyers to identify with the cultural heritage value. Recall that the greatest ethnic diversity was found in the Monterey Jazz Festival sample (34% non-White).
- Jazz St. Louis buyers are slightly more likely to connect with the spiritual value.
- Note also the overall levels of association in relation to each other. For example, consider the similar levels of association with the "making new friends... and "being involved in social, environmental or political causes."

– How can jazz presenters better tap into these value systems?



Use of Technology, by Age Cohort

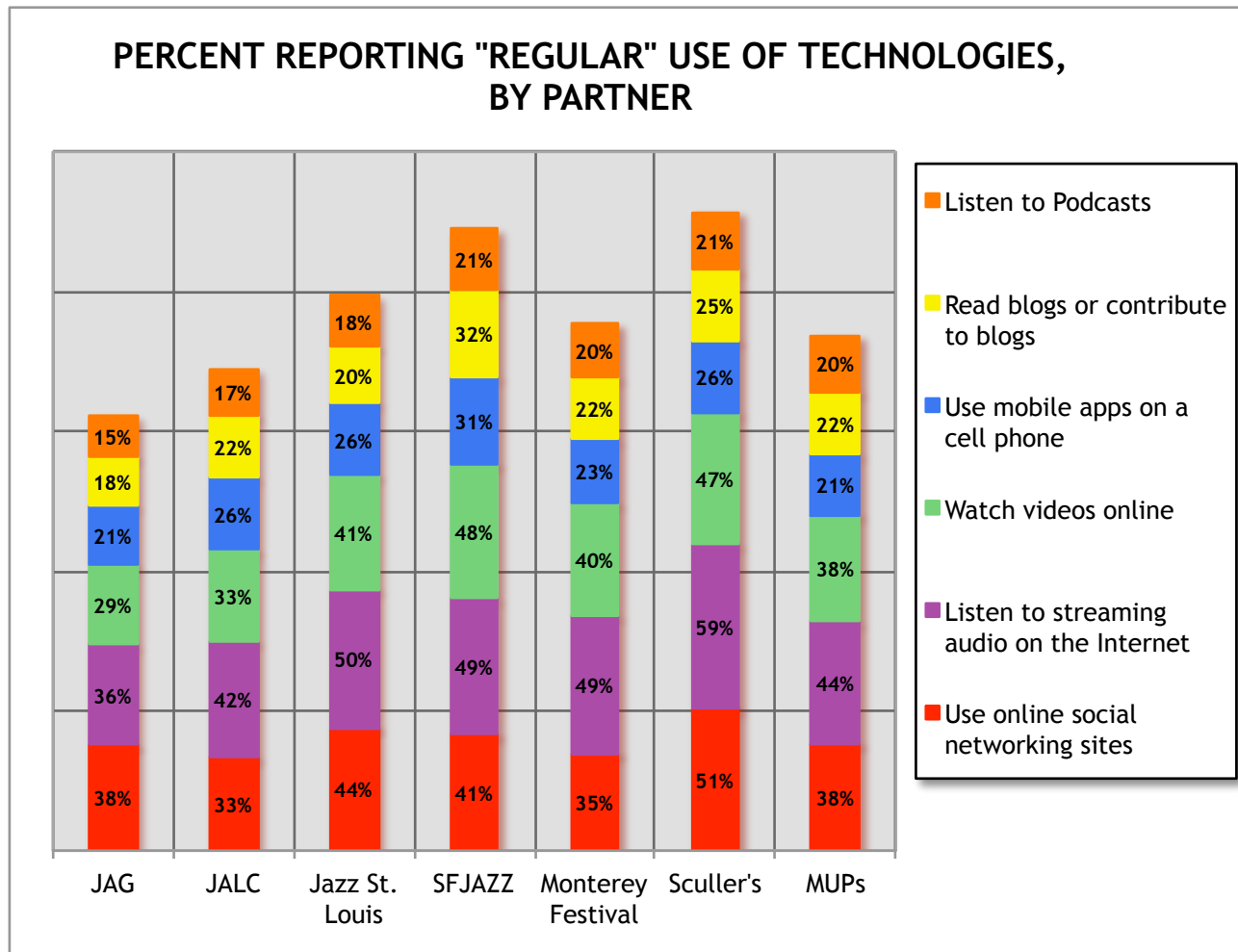
PERCENT REPORTING "REGULAR" USE OF TECHNOLOGIES, BY AGE COHORT



- Respondents were asked if they “regularly” do six different technology-based activities, in order to assess their overall adoption of technologies often used to deliver cultural content.
- The big story, of course, is the higher levels of use of all six technologies amongst younger buyers. For example, note that 77% of respondents in the 18 to 34 age cohort “regularly” use online social networking sites, compared to 18% of respondents in the 65+ cohort.
 - Again, this indicates the generational shift in technology-based cultural engagement, and illustrates so clearly why investments in technologies are so vital to the future of the sector.
 - What does this imply about marketing tactics with respect to technology-based promotions and educational content?



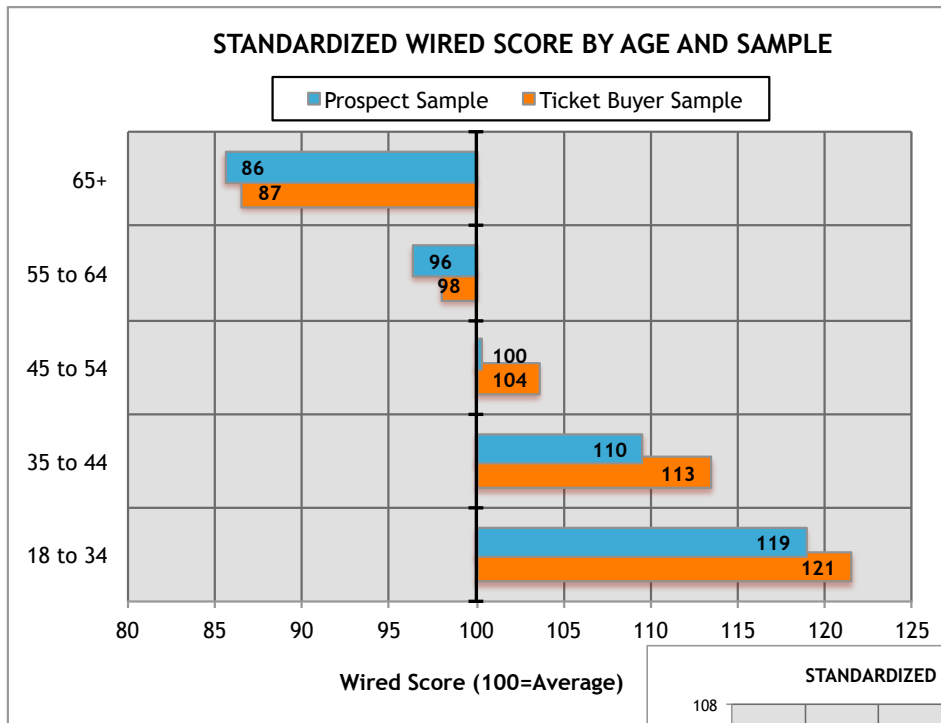
Use of Technology, by Partner



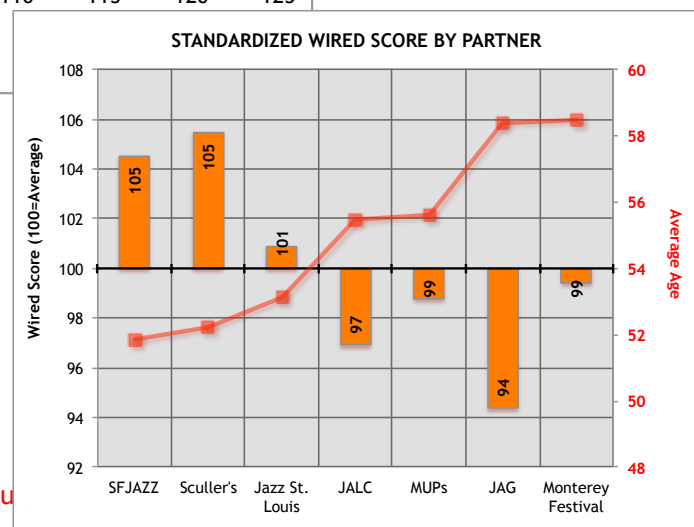
- Significant differences are evident across the seven partners with respect to technology adoption. However, bear in mind that the Sculler's and Monterey Jazz Festival samples were collected exclusively online, while the other samples involved both online and postal data collection. Otherwise, the variation in these figures appears to be driven mostly by age (see next page).



Use of Technology, by Sample



- 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). Similar results were observed across the ticket buyer and prospect samples, with respect to age.
- The chart below illustrates the standardized “wired score” across the seven partners, along with average age. Once again, a negative association is evident with respect to age and technology use.





Appendix 1: Select Individual Partner Charts

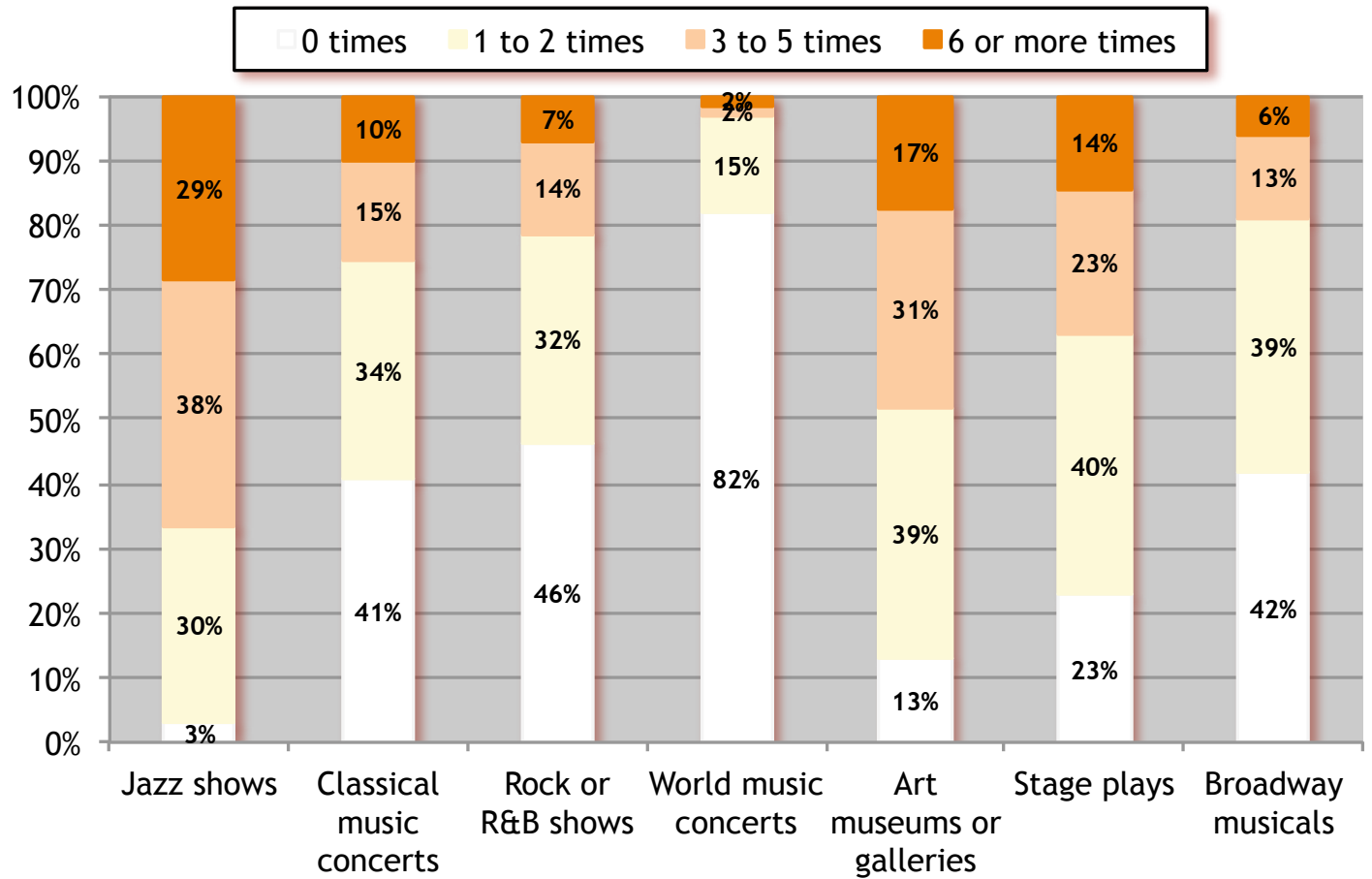




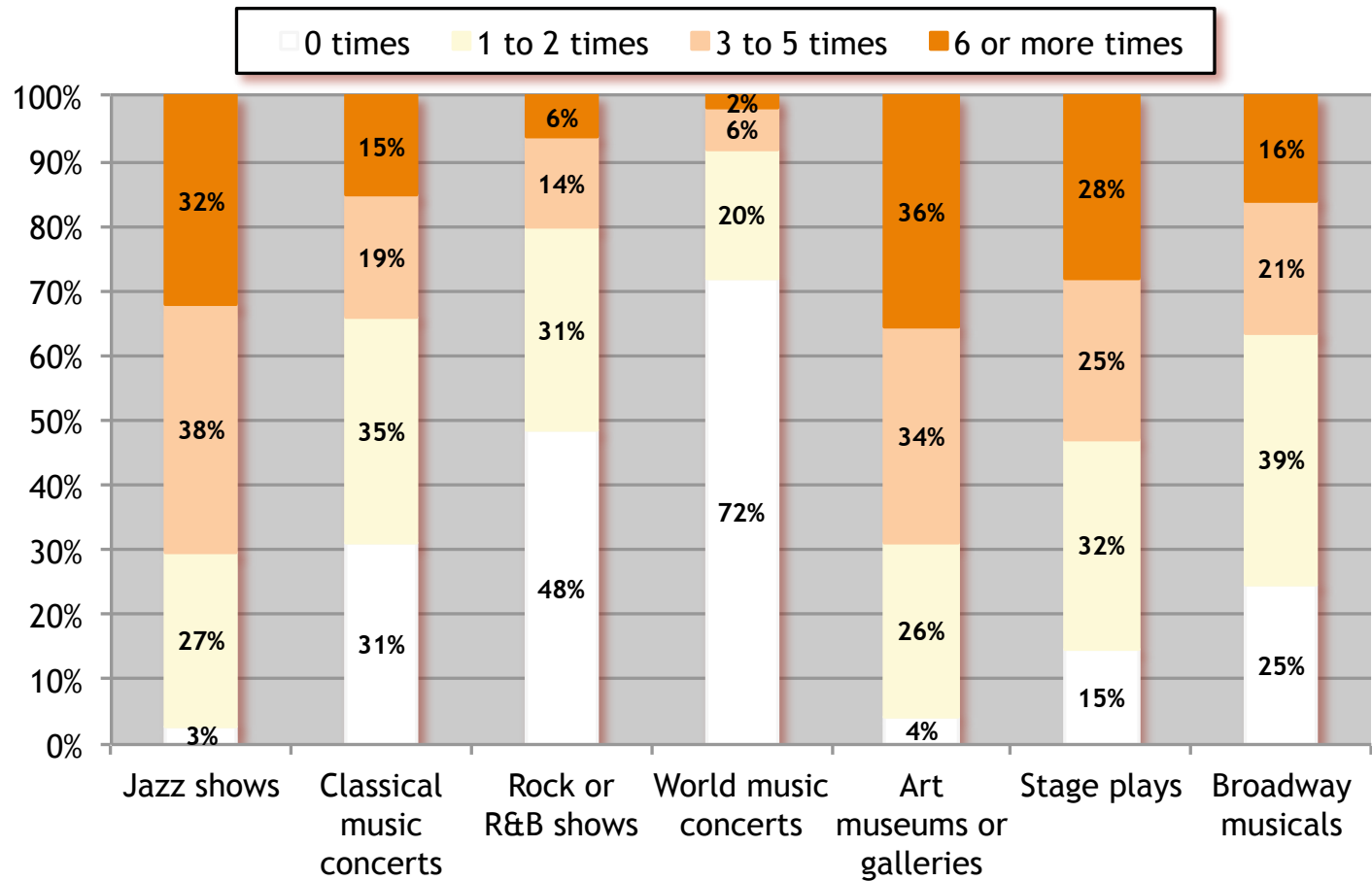
Attendance at Arts Events



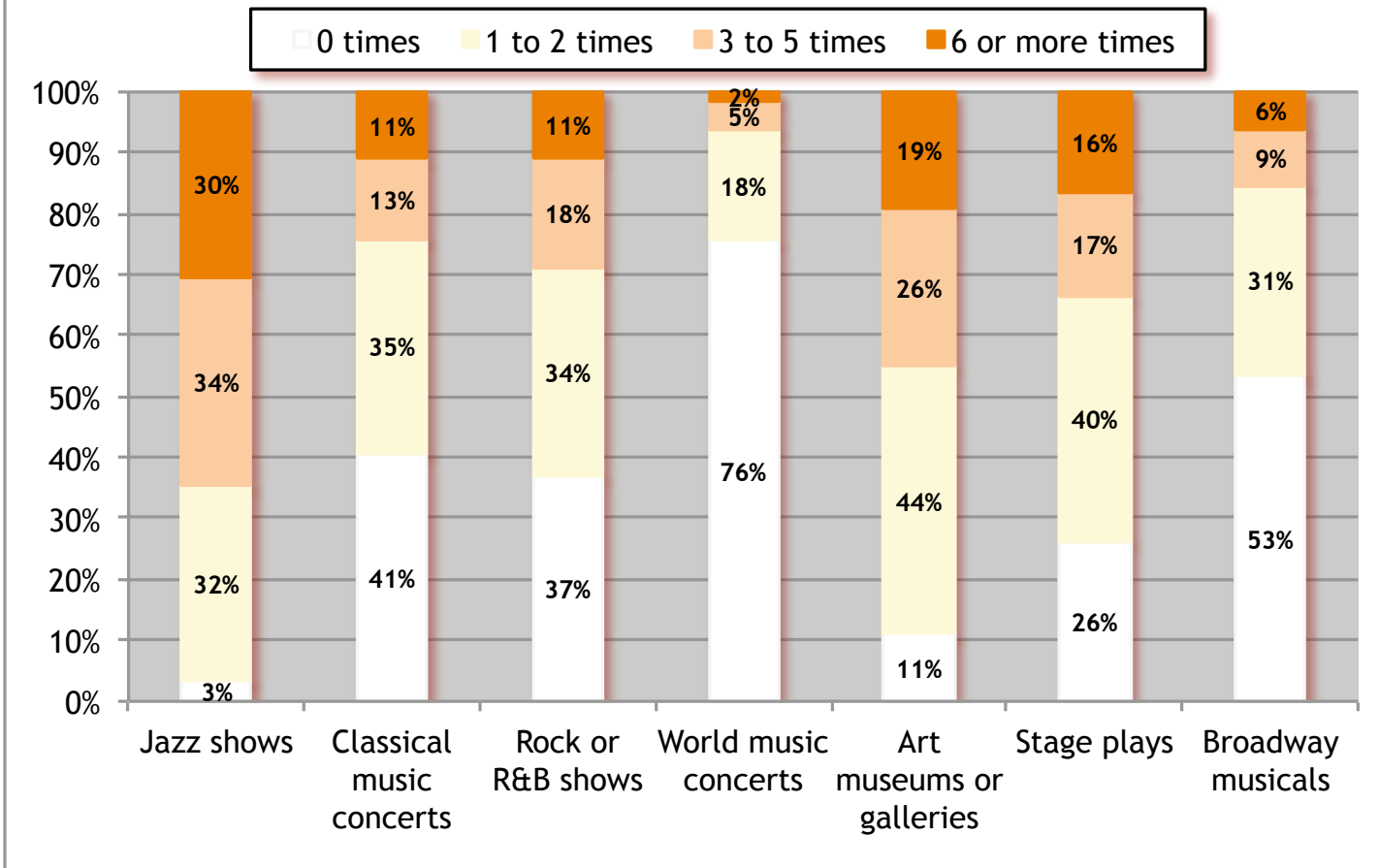
ATTENDANCE AT ARTS EVENTS IN THE PAST 12 MONTHS (JAZZ ARTS GROUP TICKET BUYERS)



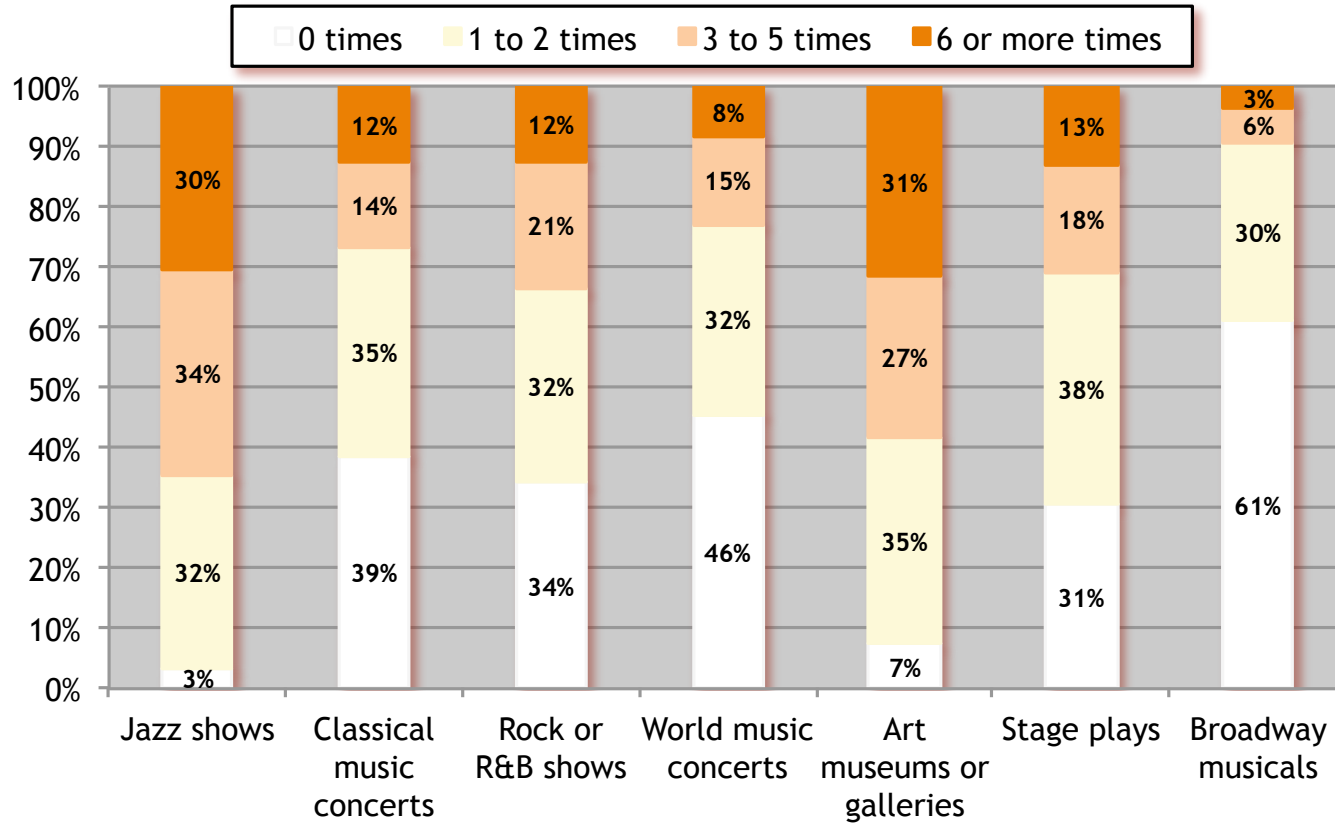
ATTENDANCE AT ARTS EVENTS IN THE PAST 12 MONTHS (JAZZ AT LINCOLN CENTER TICKET BUYERS)



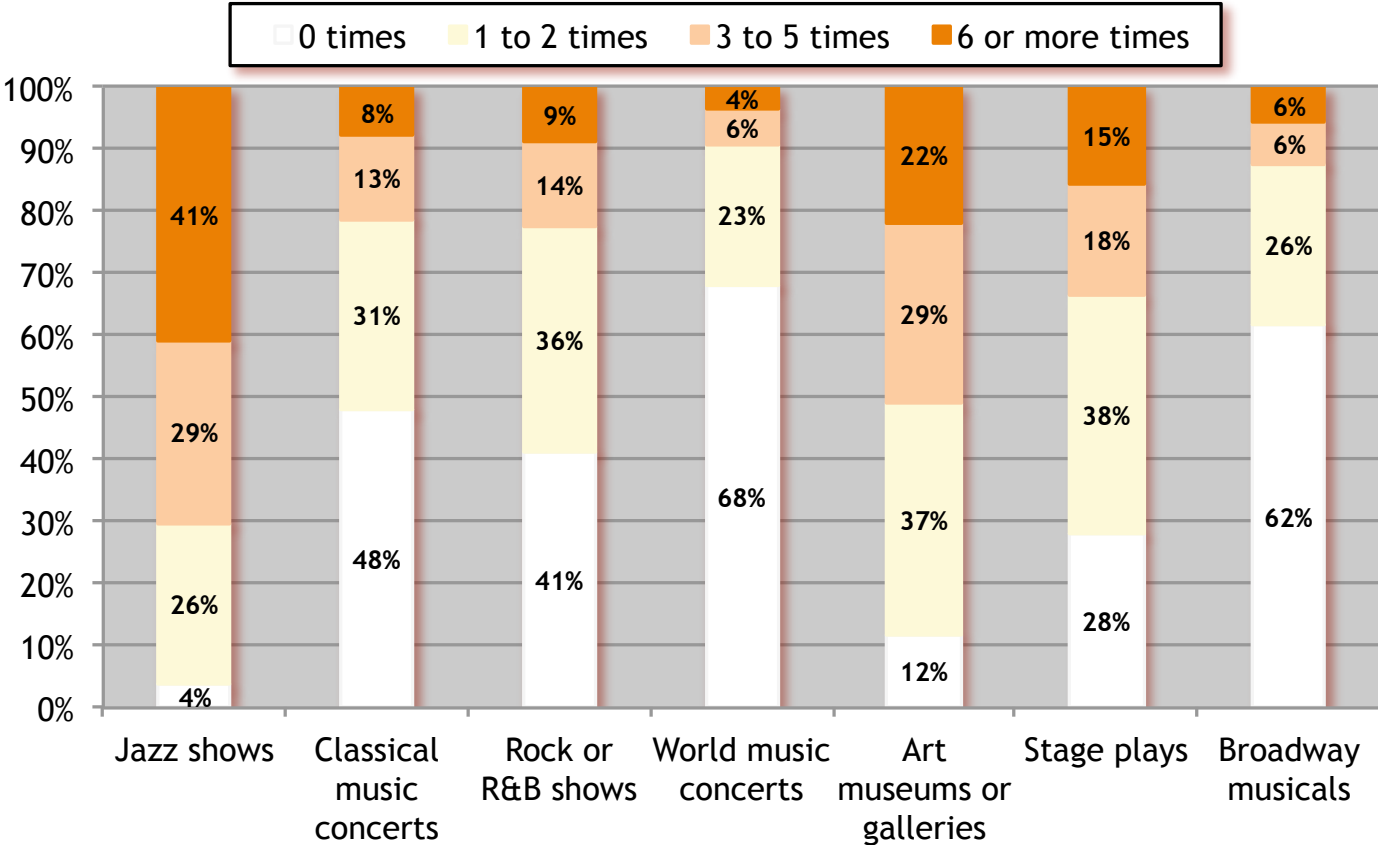
ATTENDANCE AT ARTS EVENTS IN THE PAST 12 MONTHS (JAZZ ST. LOUIS TICKET BUYERS)



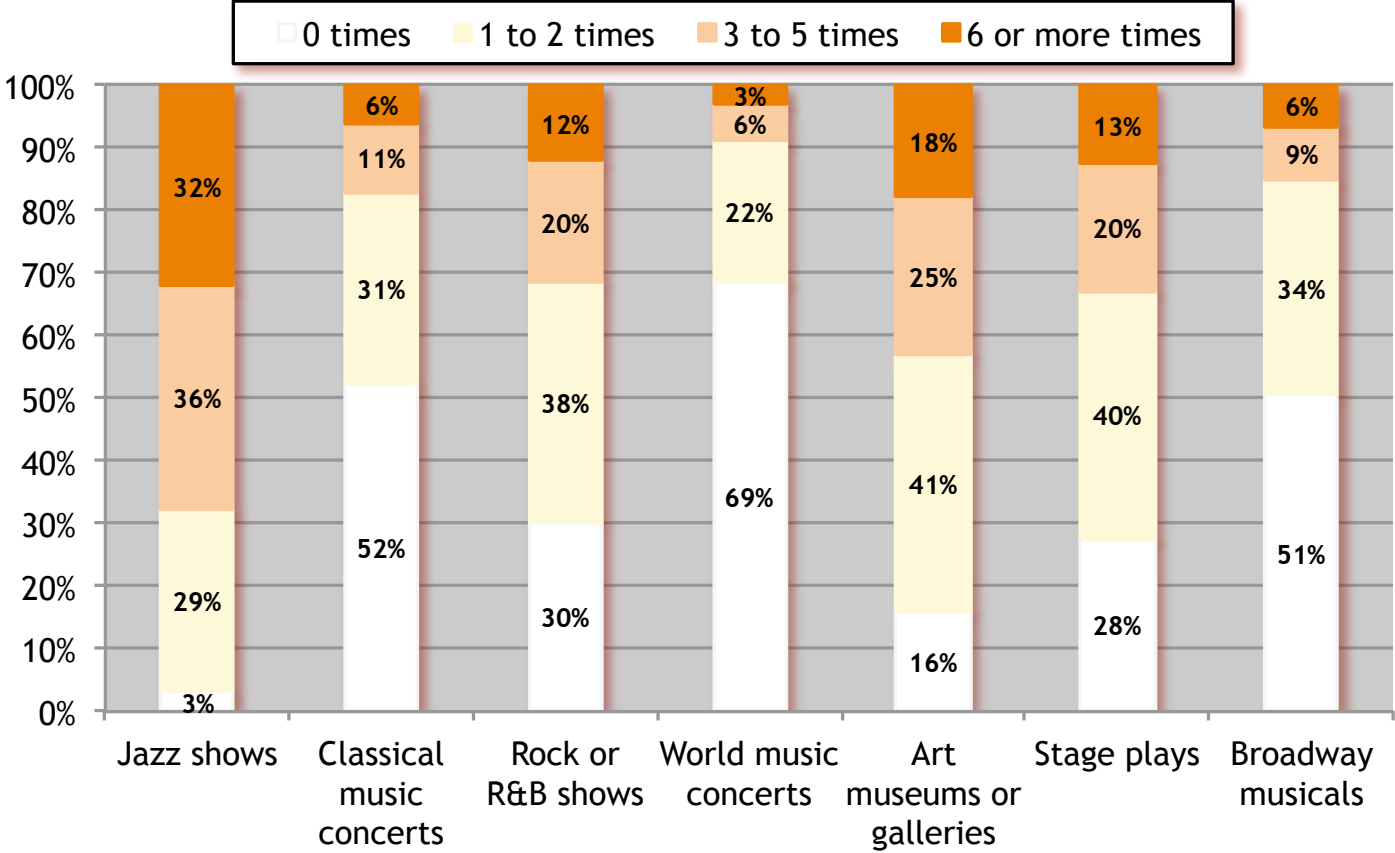
ATTENDANCE AT ARTS EVENTS IN THE PAST 12 MONTHS (SFJAZZ TICKET BUYERS)



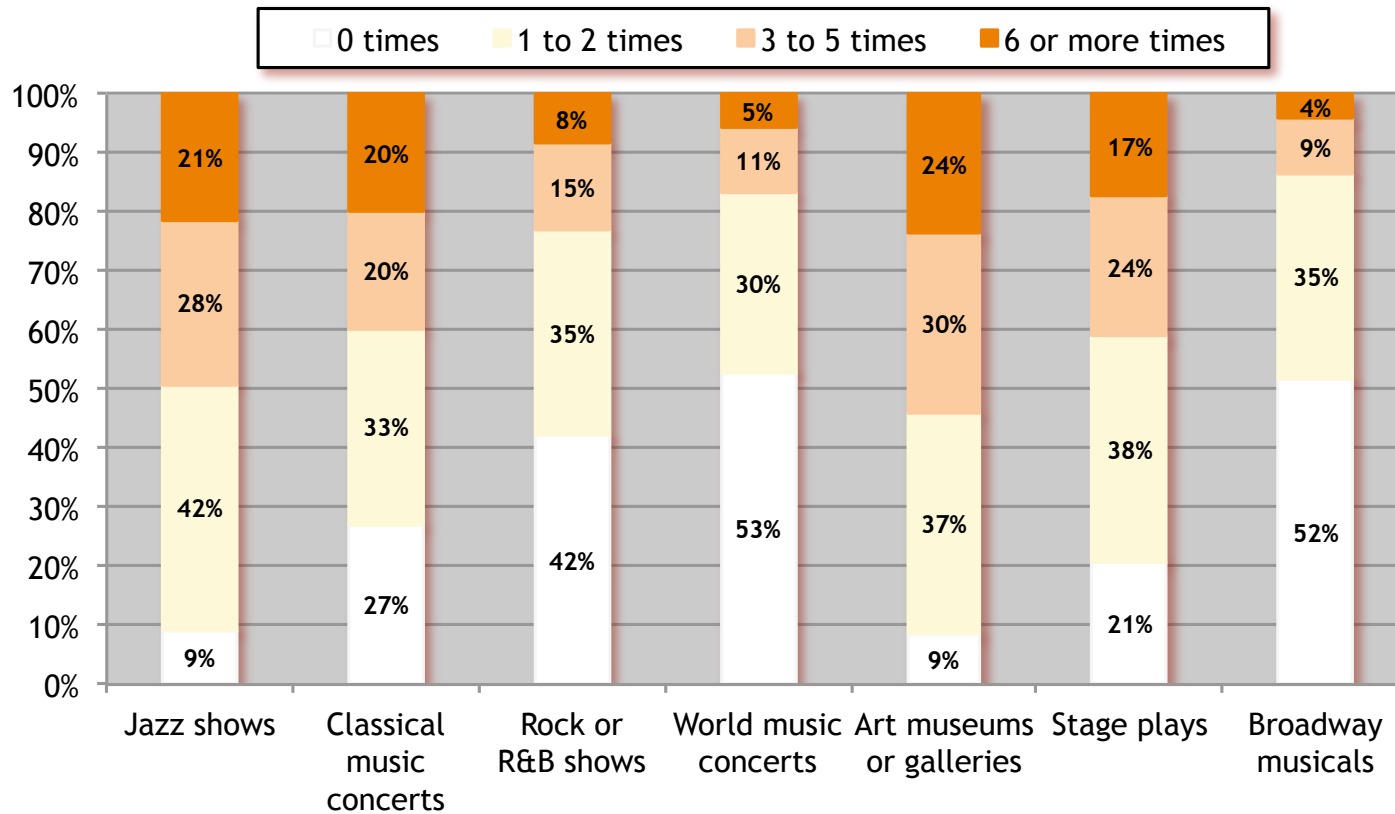
ATTENDANCE AT ARTS EVENTS IN THE PAST 12 MONTHS (MONTEREY JAZZ FESTIVAL TICKET BUYERS - ONLINE ONLY)



ATTENDANCE AT ARTS EVENTS IN THE PAST 12 MONTHS (SCULLER'S JAZZ CLUB TICKET BUYERS - ONLINE ONLY)



**ATTENDANCE AT ARTS EVENTS IN THE PAST 12 MONTHS
(MAJOR UNIVERSITY PRESENTERS TICKET BUYERS - AGGREGATE SAMPLE)**

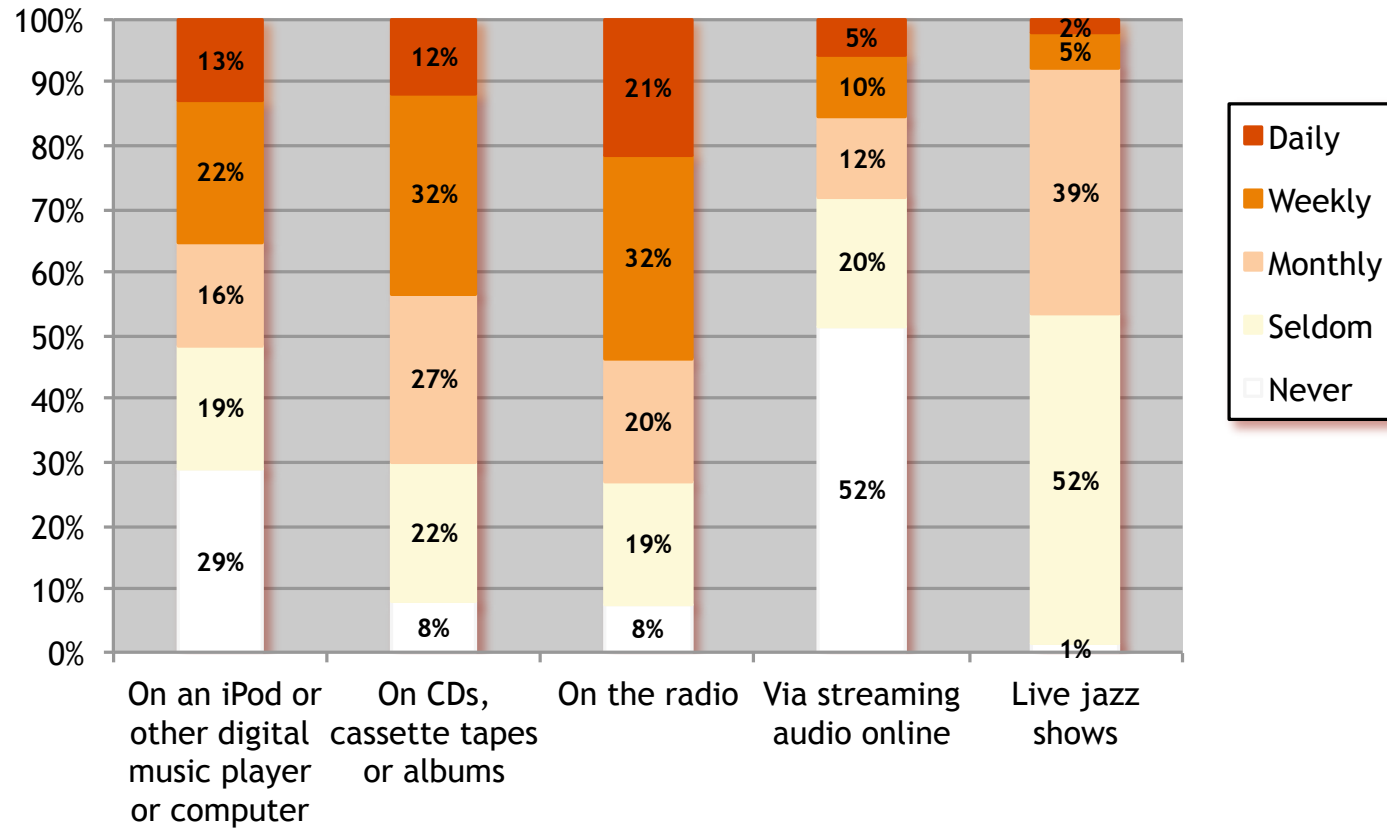




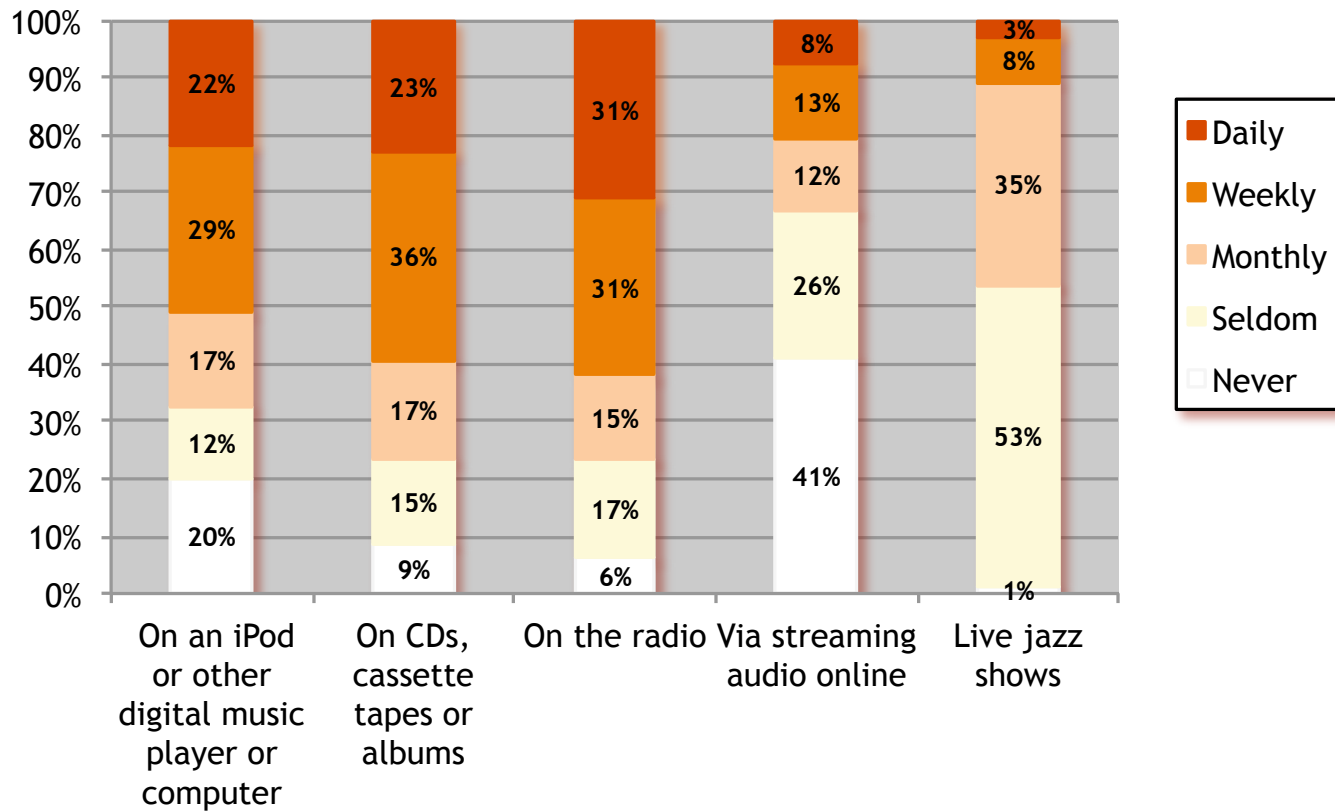
Frequency of Jazz Consumption



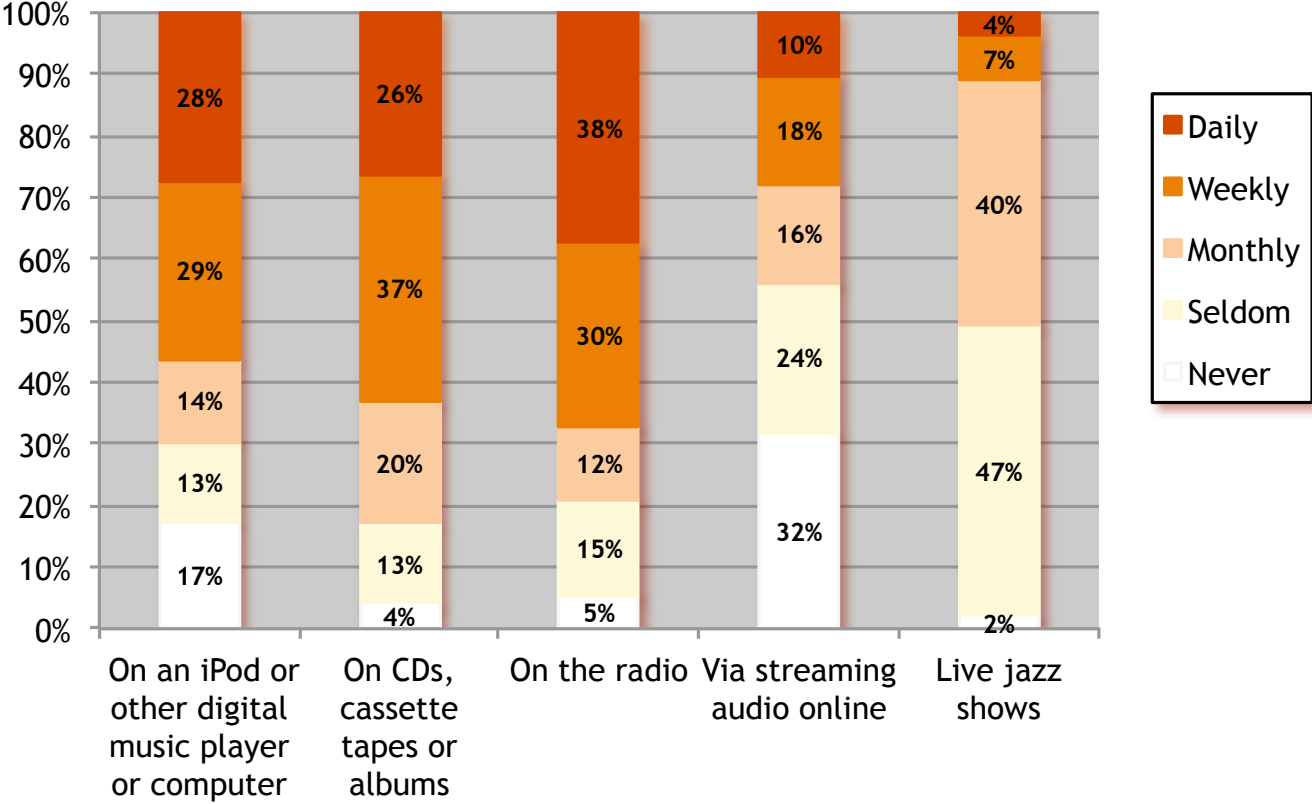
**"HOW OFTEN DO YOU LISTEN TO JAZZ MUSIC ON...?"
(JAZZ ARTS GROUP TICKET BUYERS)**



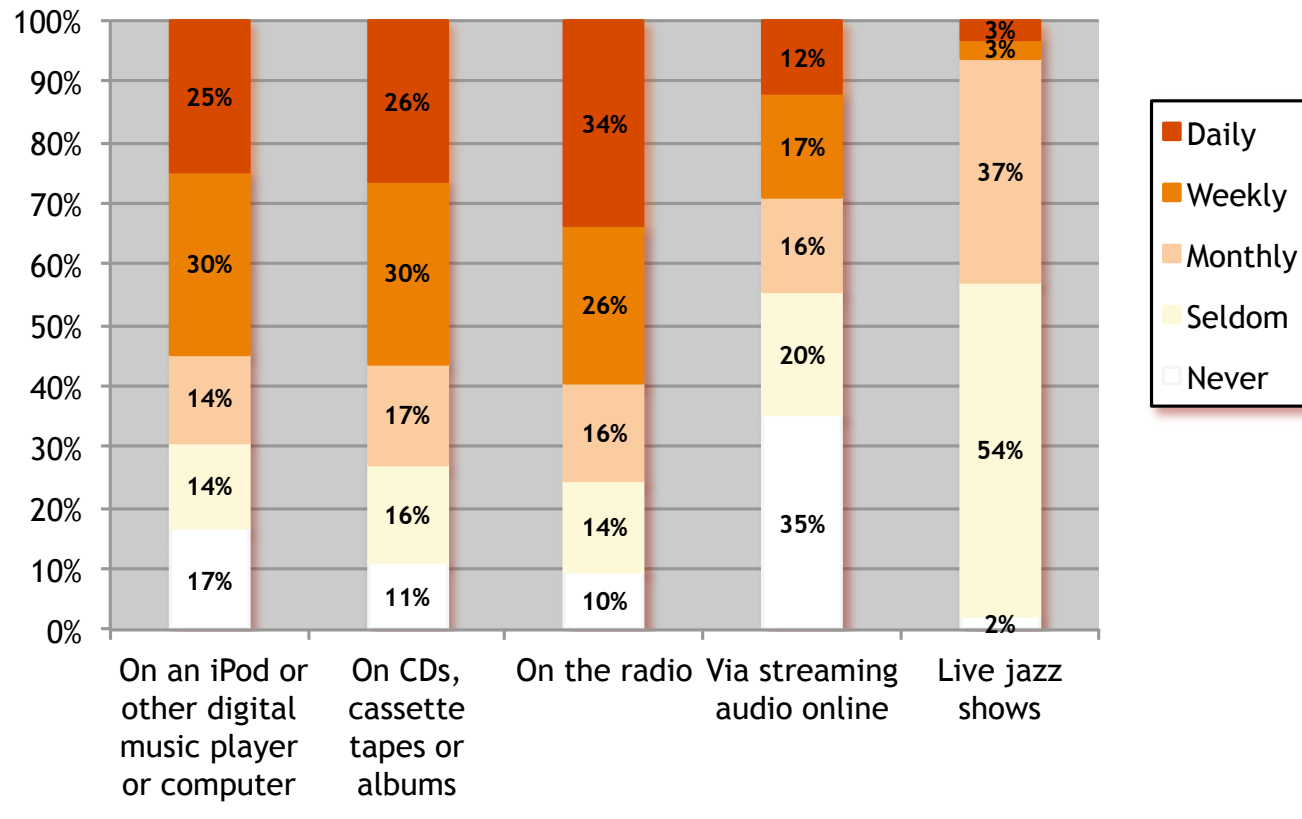
**"HOW OFTEN DO YOU LISTEN TO JAZZ MUSIC ON...?"
(JAZZ AT LINCOLN CENTER TICKET BUYERS)**



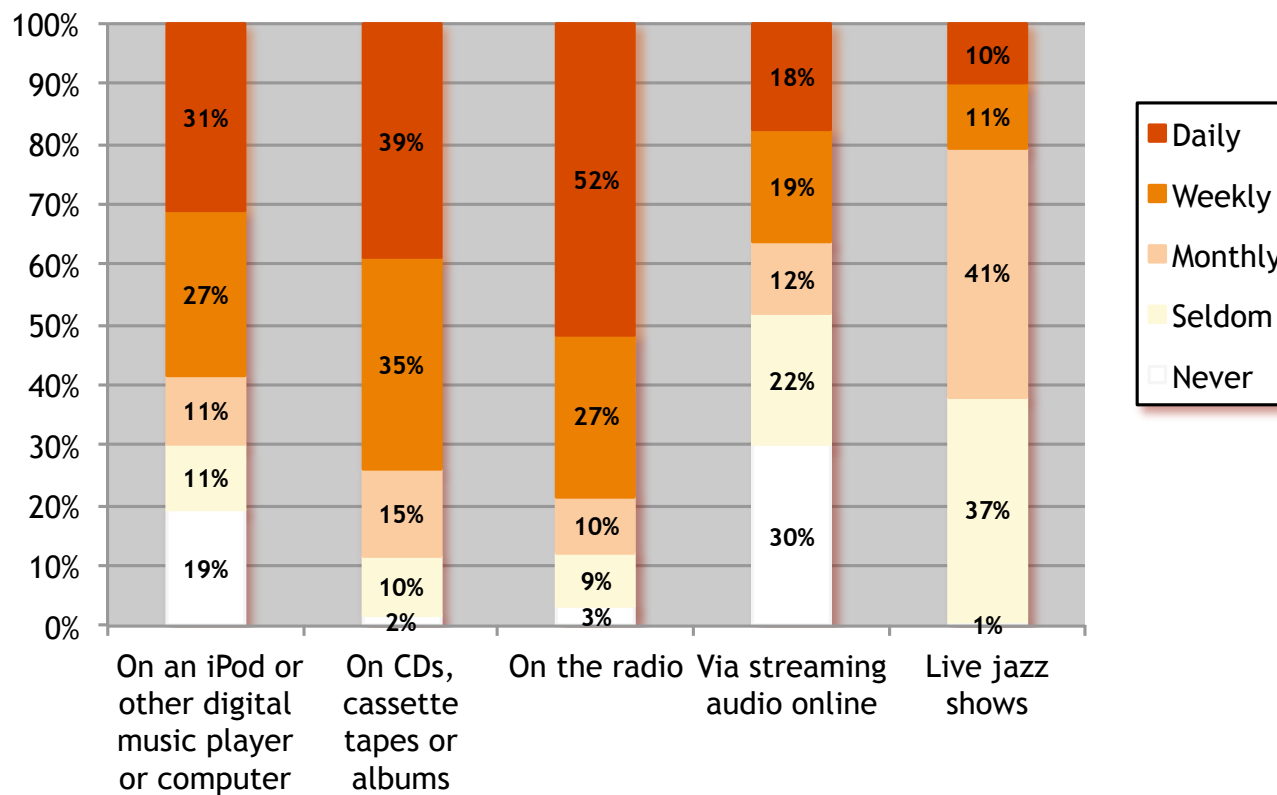
**"HOW OFTEN DO YOU LISTEN TO JAZZ MUSIC ON...?"
(JAZZ ST. LOUIS TICKET BUYERS)**



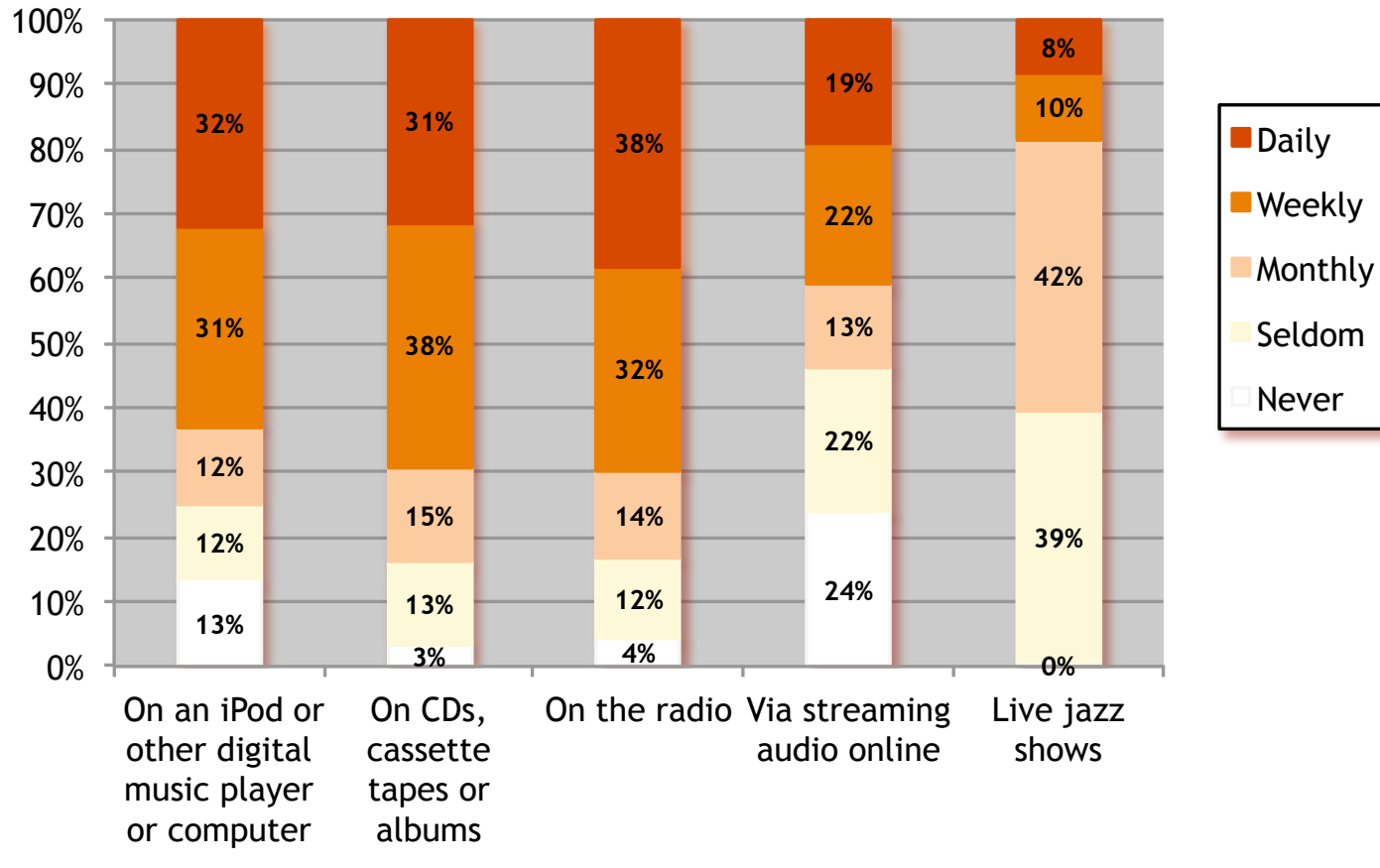
**"HOW OFTEN DO YOU LISTEN TO JAZZ MUSIC ON...?"
(SFJAZZ TICKET BUYERS)**



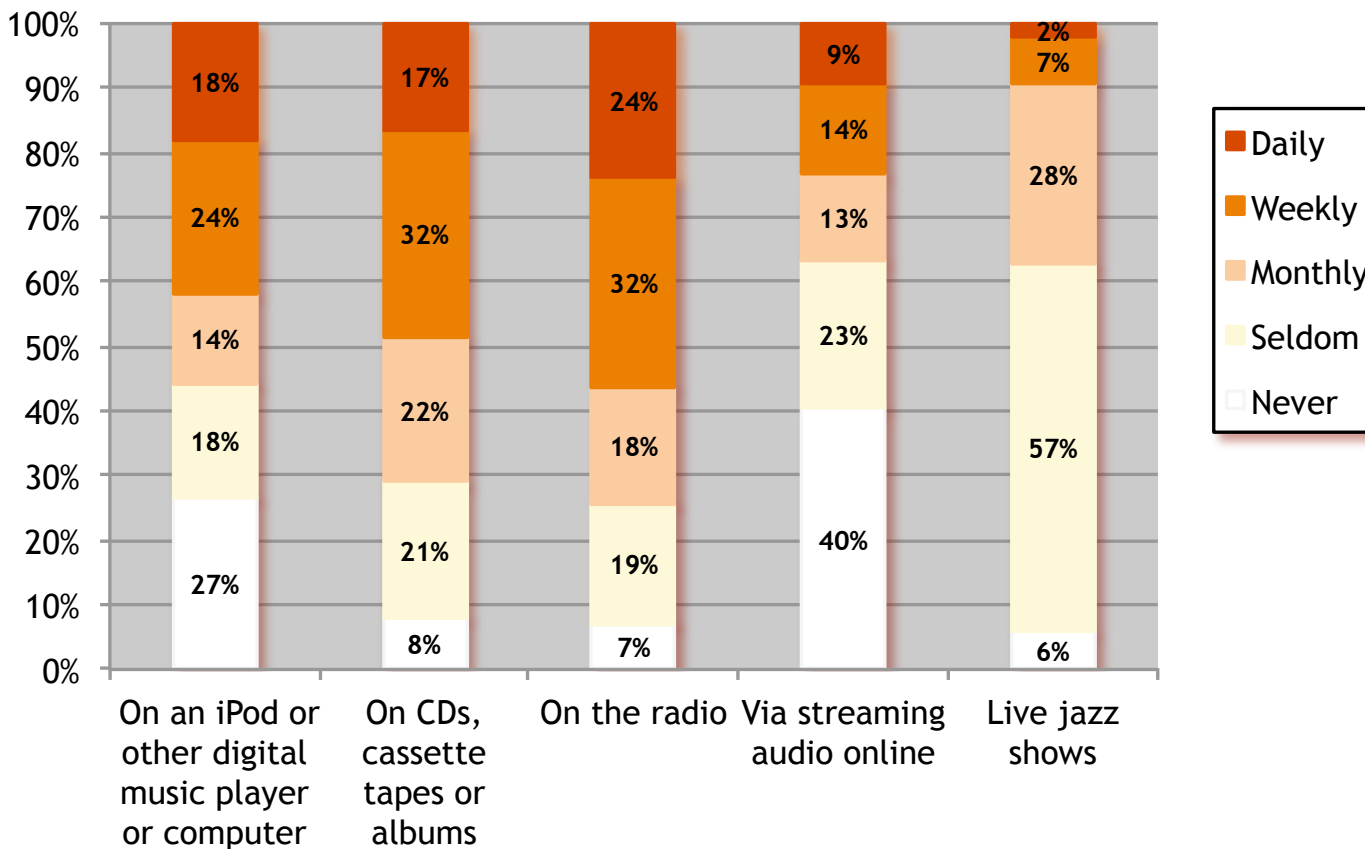
**"HOW OFTEN DO YOU LISTEN TO JAZZ MUSIC ON...?"
(MONTEREY JAZZ FESTIVAL TICKET BUYERS - ONLINE ONLY)**



**"HOW OFTEN DO YOU LISTEN TO JAZZ MUSIC ON...?"
(SCULLER'S JAZZ CLUB TICKET BUYERS - ONLINE ONLY)**



**"HOW OFTEN DO YOU LISTEN TO JAZZ MUSIC ON...?"
(MAJOR UNIVERSITY PRESENTERS - AGGREGATE SAMPLE)**





Familiarity by Artist



Familiarity by Partner

ARTIST	Jazz Arts Group	Jazz at Lincoln Center	Jazz St. Louis	SFJAZZ	Monterey Jazz Festival	Sculler's Jazz Club	MUP Consortium
Diana Krall	91%	93%	92%	92%	97%	94%	85%
B.B. King	90%	96%	96%	95%	99%	99%	93%
Kenny G	87%	87%	89%	84%	97%	99%	88%
Antonio Carlos Jobim	78%	88%	78%	88%	80%	61%	79%
Preservation Hall Band	70%	76%	80%	79%	88%	73%	74%
Keith Jarrett	68%	84%	80%	88%	85%	78%	75%
Jamiroquai	62%	73%	60%	75%	36%	50%	65%
Charlie Parker	58%	74%	78%	75%	98%	92%	69%
Pat Metheny	49%	66%	73%	70%	92%	89%	60%
Hugh Masakela	44%	71%	58%	71%	77%	67%	56%
Stan Getz	43%	47%	61%	46%	96%	88%	50%
Roy Hargrove	37%	58%	63%	65%	89%	67%	48%
Lionel Loueke	37%	54%	42%	56%	35%	34%	43%
Robert Glasper	34%	56%	39%	58%	31%	33%	42%
Ornette Coleman	33%	50%	53%	57%	84%	62%	47%
Poncho Sanchez	31%	41%	46%	50%	84%	70%	38%
John Zorn	20%	32%	30%	28%	38%	35%	25%



Familiarity by Age Cohort

	18 to 34	35 to 44	45 to 54	55 to 64	65+
B.B. King	92%	94%	96%	98%	93%
Diana Krall	85%	94%	95%	94%	89%
Kenny G	80%	86%	94%	95%	91%
Jamiroquai	75%	71%	54%	50%	55%
Charlie Parker	68%	72%	80%	88%	72%
Antonio Carlos Jobim	64%	71%	71%	78%	85%
Keith Jarrett	62%	70%	80%	84%	76%
Ornette Coleman	61%	62%	57%	58%	49%
Stan Getz	53%	59%	68%	74%	60%
Pat Metheny	52%	70%	79%	79%	65%
Preservation Hall Band	52%	66%	77%	86%	76%
Roy Hargrove	48%	58%	65%	65%	59%
Poncho Sanchez	39%	53%	60%	60%	46%
Robert Glasper	35%	36%	36%	39%	42%
Lionel Loueke	34%	38%	39%	42%	40%
Hugh Masakela	33%	46%	63%	76%	59%
John Zorn	29%	29%	31%	32%	27%





Appendix 2: Survey Protocol

