



**A SEGMENTATION MODEL
FOR PERFORMING ARTS
TICKET BUYERS**

Commissioned by 14 Major University Presenters

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STUDY PARTNERS

This segmentation report is part of a larger multi-method collaborative research effort called The Values and Impact Study, commissioned in 2005 by a consortium of 14 major university arts presenters (MUP). The study was completely self-funded by the consortium. Oversight of the study was provided by a committee consisting of the six marketing directors of the Lead Partner institutions.

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INTRODUCTION

This report is the product of a large-scale online survey effort (“the Values Survey”) conducted in October 2006 as part of the larger MUPs Value and Impact Study, a two-year study of the values and motivations driving performing arts attendance and donation. The overall purpose of the Values Survey was to build new customer segmentation models for performing arts ticket buyers and donors, to aid in future marketing and fundraising efforts. This report presents the ticket buyer segmentation model. The donor model will be released in the spring of 2007 as a supplement to this report.

Historically, target marketing efforts by arts presenters have relied on transaction data.¹ A customer who buys a ticket to a dance performance, for example, is assumed to be a prospect for future dance performances, and is targeted accordingly. While past behavior is certainly a helpful indicator of future behavior, it should not be the sole basis for targeting. Values, beliefs, aspirations and motivations drive purchase and donation. Until now, however, performing arts presenters have lacked a field-specific customer segmentation model. Previous to this study, only one major research effort attempted to classify performing arts ticket buyers into unique segments,² although several general consumer models over the years have been used to some extent by arts organizations.^{3 4} Numerous other studies of arts consumers have explored the attitudinal dimensions of arts attendance.^{5 6 7 8}

A customer’s purchase history paints an incomplete picture of her actual “cultural profile.” For example, the dance buyer may be more interested in chamber music – a fact that would remain unknown until the customer buys a chamber music ticket, which could take years. Or, a buyer’s interest in the arts may be filtered through a set of political beliefs or cultural values that transcend genre or discipline. In the ticketing database, the customer may appear as a theater buyer, when, in reality, her

¹ The most comprehensive reference book on target marketing based on arts consumer transaction data is *Full House: Turning Data into Audiences*, by Roger Tomlinson and Tim Roberts, 2006, published by the Australian Council for the Arts

² *The Professional Performing Arts: Attendance Patterns, Preferences, and Motives*, by Arnold Mitchell, SRI International, 1984, commissioned by ACUCAA (now Arts Presenters), was an in-depth study of 686 individuals in four VALS types associated with arts attendance (Achievers, Societally Conscious, Experientials, and Integrated).

³ VALS (Values and Lifestyles) was a seminal psychographic consumer model first developed in 1978 by Stanford Research Institute (SRI); VALS2 was released in 1989. You can still take the VALS survey at <http://www.sric-bi.com>.

⁴ Leisure Lifestyles Model, NEA Research Div. Report #14, Belk/Andreason, 1981, based on a sample of 1491 “potential attenders” age 14+ in four southern cities. Six segments were identified: Passive Homebody, Active Sports Enthusiast, Inner-Directed, Self-Sufficient, Culture Patron, Active Homebody and Socially Active.

⁵ *Motivating Opera Attendance*, 1996, commissioned by Opera America, member opera companies and the NEA, conducted by Arts Market Consulting.

⁶ Zaltman Metaphor Elucidation (ZMET) Study of Arts Attenders, 1998, commissioned by the Heinz Endowments, employed a proprietary qualitative research technique to elicit subconscious beliefs about arts attendance.

⁷ Audience Motivation Study, commissioned by the American Symphony Orchestra League & member orchestras, 2001, an in-depth analysis of attitudinal factors influencing classical music attendance.

⁸ Classical Music Consumer Segmentation Study, 2002, commissioned by the John S. and James L. Knight Foundation and 15 orchestras, conducted by Audience Insight LLC, includes several segmentation models specific to orchestras.

allegiance is not to the theatrical art form, but to a value system centered around social justice or conservation.

Hence, the primary focus of the Values Survey was to elicit attitudinal information – values, beliefs, preferences and tastes – that relate specifically to attending and supporting performing arts presentations. For the first time, attitudinal data collected through survey research was matched to actual purchase and donation behavior (using email address as a match variable), in order to evaluate a wide range of attitudinal variables on the extent to which they predict donation behavior or purchase of different types of performances.

In preparation for this effort, a significant multi-site qualitative research effort was undertaken by the study partners, including 195 in-person interviews with ticket buyers and donors. A summary report from that effort was distributed to the study partners in August 2006, and serves as the conceptual basis for the protocol developed in this survey effort.

Values Survey Research Questions

- Do ticket buyers' values and beliefs help to explain what presentations they buy?
- Which attitudinal variables contribute the most predictive value to incidence of ticket purchase and donation?
- How well do ticket buyers' preferences for different types of presentations correlate with actual purchase behavior? How much of a gap is there between what people say they like, and what people actually buy?
- How can we most effectively segment ticket buyers and donors according to their values, beliefs and preferences?
- Should the customer/donor database of the future include attitudinal and preference data, as well as purchase and donation data?

Towards a Next Generation Customer Database

The vision behind the values track of the Values & Impact Study is that we are creating the next generation customer database that allows for a much higher level of customer relationship management (CRM) and micro-targeting or “nano-casting.” We imagine a time, perhaps five to ten years from now, when every ticket buyer and donor, as part of the CRM protocol, fills out a customer profile about their cultural attitudes and preferences (i.e., “addressable attitudes”).⁹ Every time a new customer buys a ticket, a welcome message follows with an invitation to complete the profile, by one means or another (i.e., online, on the telephone, or a paper survey). The general idea is to create a continuously updated self-populating marketing database linked to ticketing and donor data. Obviously, there are technology hurdles to cross and significant financial resource implications. But the technology solutions are moving in this direction.

For example, imagine a time when presenters can identify customers in their databases who want to feel a part of the evolution of new art forms, or customers who see themselves as taste-makers or cultural initiators who also express a high preference level for music and dance of diverse cultures. From a fundraising standpoint, imagine a time when presenters can identify customers who report a high desire for civic connectedness or whose belief system revolves around creating opportunities for disadvantaged youth.

⁹ *Coming to Concurrency: Addressable Attitudes and the New Model for Marketing Productivity*, by J. Walker Smith, Ann Clurman, and Craig Wood, 2005, Yankelovich Partners

The Values Survey is a big stepping stone towards this vision. We are doing the groundwork now to define and test the attitudinal and other variables that will make up the next generation customer database, and we are creating the first multi-dimensional segmentation models specifically designed for performing arts donors and ticket buyers. Eventually, we envision, every ticket buyer and donor in an arts organization's database will be profiled in-depth and segmented.

The question arises if presenters will be able to afford to use this information, given their limited marketing resources. Certainly, using a next generation customer database to "nano-cast" or target on a more granular level will require new resources, or at least a significant realignment of resources. But there is already clear movement in our industry and in other industries towards customized email and other electronic marketing, as well as digital printing which allows for the possibility of delivering a different message to every customer.

While it is too early to see beyond the current study with any level of clarity, it may be that some of the MUP study partners may want to continue working towards an addressable attitudes database after the study is over, by creating the mechanism for customer profiling and beginning to accumulate and use this information on a systematic basis.

Is there a fundamentally better way to market and fundraise for the arts? We believe that there is, and moving towards a new level of competence is what the Values Survey is all about. No one is advocating for wholesale abandonment of tried and true practices, which would be foolish. A precondition of any change process, however, is the firm belief that things cannot stay the same. Therein lies the conundrum of excellence – an unflinching commitment to maximize results with existing tools, insight and resources, and, simultaneously, a passion for innovation rooted in the belief that there is a better way.

PART 1 – STUDY METHODOLOGY

Sampling Frame & Response Report

The Values Survey employed an online survey methodology. Two customized, branded surveys were prepared for each of the 14 study partners – one for ticket buyers and one for donors. The broadcast emails inviting cooperation with the survey were also customized and included a special message from each program director. Each of the 28 surveys was deployed through the consultant’s Zoomerang online survey account. To respondents, the survey appeared to be sent by the presenting program, not the consultant. To increase the cooperation rate, each of the study partners offered an incentive of some sort – either a free ticket offer (e.g., buy one, get one free) or a discount offer. The offer appeared on the last page of the survey, and was customized for each site.

The number of email addresses provided by the study partners varied depending on the number of customer records provided. Up to 6,000 ticket buyer email addresses were used for Lead Partners, and up to 4,000 were used for Associate Partners. In some cases, all of the email addresses provided by a partner were used, while in other cases a random sample of ticket buyer email addresses was drawn. Since most of the study partners had a limited number of donor email addresses, most all of the donor email addresses provided were used. Two broadcast emails were sent to each list, an initial email inviting cooperation and a follow-up email approximately one week later. A response report appears below. The email invitations and reminder messages were deployed through the Zoomerang site, which allows capture of respondent email addresses in the survey data file. All respondents were provided with an opt-out option in the invitation emails.

Data File Preparation

Each of the 14 study partners provided two customer data files to the consultants, one for ticket buyers and one for donors, using a standard file format. The instructions for preparing data files appear in Appendix 2. For ticket buyers, the data files contained email addresses and a series of variables indicating the types of shows actually purchased over the past two years. For donors, the data files contained email addresses and actual gift amounts over the past four years. To ensure confidentiality, the names of respondents were not requested or received by the consultants.

After receiving the data files, the consultants cleaned, standardized and compiled the customer data into two master files, one for ticket buyers and one for donors. The lists were de-duped twice, once within each list and once across all lists to make sure that no one would receive two emails. A period of approximately two to three weeks was allowed for survey response, after which the data individual survey data files were pulled down from the Zoomerang site and combined into a single SPSS data file. As part of the data file preparation work, actual purchase data and actual gift amount data were matched with survey data using the email address as a match variable. In this fashion, we were able to cross-reference survey data (i.e., attitudes and beliefs) with purchase data (behaviors).

Pre-Test

A pre-test of the survey protocols for ticket buyers and donors was conducted in September 2006 using email addresses provided by the University Musical Society in Ann Arbor. Based on the results

of the pre-test, a number of improvements were made to the protocols and to the online administration procedures.

Response Rates

A total of 58,793 ticket buyers and donors received email invitations to take the final versions of the surveys, and a total of 9,416 responded. The average response rate for ticket buyers was 15%, and for donors was 24%. Response rates for ticket buyers ranged across the 14 sites from a low of 8% to a high of 28%. For the donor survey, response rates ranged from a low of 12% to a high of 53%. Two sites did not provide donor lists. Many factors may have contributed to the variation in response rates, including the use of different incentives, the hygiene of the lists, the different times that broadcast emails were sent out and a variety of other factors.

ONLINE VALUES SURVEY: FINAL RESPONSE REPORT	TICKET BUYER SURVEY			DONOR SURVEY		
	# of Invites *	# Completes	% Response	# of Invites *	# Completes	% Response
University of Florida Performing Arts	4,737	681	14%	394	127	32%
Clarice Smith Performing Arts Center	5,328	531	10%	204	42	21%
ASU Gammage	4,813	664	14%			
Mondavi Center for the Performing Arts	5,939	481	8%	2,224	271	12%
University Musical Society	5,422	1,163	21%	556	237	43%
Lied Center for Performing Arts	2,889	564	20%	617	177	29%
Hancher Auditorium	3,979	563	14%	1,391	361	26%
Krannert Center for the Performing Arts	2,669	754	28%	270	142	53%
Lied Center of Kansas	1,365	317	23%	283	108	38%
Penn State Center for the Performing Arts	3,667	445	12%	254	60	24%
Cal Performances	3,365	475	14%	445	132	30%
Stanford Lively Arts	1,844	315	17%	494	97	20%
Hopkins Center at Dartmouth	3,994	442	11%			
Annenberg Center for the Performing Arts	1,530	250	16%	120	17	14%
GRAND TOTALS	51,541	7,645	15%	7,252	1,771	24%

* adjusted to exclude undeliverable e-mail addresses, ranging in quantity from 1-10% of the sample.

National Consumer Sample

To allow for comparison of the results, a modified version of the survey was deployed through Zoomerang to a cross-section of 600 U.S. consumers. The email sample was purchased through Market Tools, Inc., the parent company of Zoomerang. Results from the National Sample are reported along with site-by-site results in Appendix 3 only, and were not used in the segmentation modeling work.



Survey Design

The design of the Values Survey benefited a great deal from a large amount of qualitative data gathered earlier in the study through in-depth interviews conducted at six sites (results published separately). The protocol was drafted by Alan Brown and provided to all of the study partners for review and comment. The protocol was also vetted by SDR Consulting, the contractor assisting Wolf-Brown with the customer segmentation work. The final version of the survey reflects the combined insights of the consultants and the study partners and was truly a collaborative effort. A complete copy of the survey protocol appears in Appendix 1. The protocol was organized into several sections or modules, as follows:

	<u>Ticket Buyers</u>	<u>Donors</u>
Introductory/Background Questions.....	X	X
Cultural Attitudes.....	X	X
Cultural Preferences and Tastes		
Attitudes about Culture and Cultural Experiences.....	X	X
Music Preferences and Tastes.....	X	
Dance and Theater Preferences and Tastes.....	X	
Core Values and Beliefs		
Inner-Directed Values.....	X	X
Outer-Directed Values.....	X	X
Gardner’s Intelligences.....	X	
Donor Motivations.....		X
Attitudes about Donating.....		X
Consumer Behaviors Related to Arts Attendance.....	X	X
Demographic and Lifestyle Characteristics.....	X	X

Appended to Survey Data, From Customer Data Files Provided by the Study Partners:

Incidence of Purchase, 18 Categories of Events.....	X
Actual Contribution Amounts, Past Four Years.....	X

A brief discussion of each of the protocol sections follows.

Introductory/Background Questions [all respondents]

To begin the survey, respondents were asked a small number of background questions about their connections to the university, area of study, loyalty to presenter, and whether or not they identify as an artist. These variables were used for descriptive purposes and were not used as segmentation variables.

Cultural Attitudes [all respondents]

All respondents were asked a module of questions about their “cultural frame,” in order to understand more about how they think and feel about arts and culture. This section included questions about the respondent’s level of interest in the art of various cultures, extent to which faith influences culture choice, appetite for new work by living artists, risk tolerance and other attitudes about culture. Most of these variables were used in the segmentation modeling.

Cultural Preferences and Tastes [ticket buyers only]

Preference data is a core element of the ticket buyer segmentation model. This module of the protocol delves into respondents' preference levels for various types and sub-types of performing arts presentations, including music, dance and theatre. An additional question allows respondents to identify a number of personal creative activities in which they take "a vital interest."

Core Values and Beliefs [all respondents]

This module investigated the respondent's belief system – the underlying values that drive consumption of all types of products and experiences, not just culture. For example, respondents were asked to rate the level of importance that they ascribe to "rejecting authority and making your own rules." Twenty-two value statements were tested, organized in two sections, inner-directed values and outer-directed values. These values are not necessarily sales drivers in terms of specific performances but rather reasons why people find relevance in an institution or a series of programs, or why they might understand a category of activity (e.g. going to jazz concerts) as something that validates their self-image.

Donor Motivations and Attitudes [donors only]

Donors complete two protocol modules relating specifically to their attitudes about donating. The first section investigates the degree to which various reasons for donating influence the respondent. A second module of donor questions investigates a range of other issues surrounding donation such as knowledge of planned giving vehicles, priorities for how their donation might be spent, payment preferences, and other types of philanthropic causes supported.

Consumer Behaviors [ticket buyers only]

This module elicits data on consumer behaviors related to arts attendance, including social context for attending, attitudes about advance commitment, price sensitivity, etc.

Demographic and Lifestyle Characteristics [all respondents]

The final section of the protocol enumerates a small number of demographic and other characteristics for descriptive purposes. Since the focus of the study is attitudes, not demographics, these questions were purposefully quite limited. Donors were asked to indicate their household income cohort, but ticket buyers were not. Race/ethnicity was not asked of either group.

Cluster Analysis Methodology

A K-means cluster analysis methodology was employed to group respondents into homogenous segments. K-means is a non-hierarchical clustering procedure that forms discrete clusters or groups of customers. Initially, individual cases are assigned to the cluster that they most resemble. Then, cluster centers are recomputed and cases are reassigned if they are closer to the updated centers of another cluster than they are to their own. This process continues until a convergence criterion is met. For example, if the criterion is set at .02, iteration would stop once a complete iteration does not move any of the cluster centers by a distance of more than two percent of the smallest distance between any of the initial cluster centers.

To arrive at the best possible model, many different iterations of cluster analysis were analyzed, including solutions ranging from two to ten segments, until reaching the final model. Half way through the analysis process, it became apparent that the presence of Broadway-only buyers in the sample was driving several segment definitions and muddying the waters somewhat. So, it was decided to pull out the Broadway-only buyers into a separate pool of respondents that could be modeled separately at a later time. Respondents who had purchased Broadway tickets as well as any other types of performances were kept in the larger data set.

Input Variables

A total of 51 variables were allowed into the final iteration of the ticket buyer segmentation model.

Cultural Attitudes

- Q9 Interested in specific cultures? (Yes/No)
- Q11A Interest in Hip Hop/contemporary culture
- Q11B Interest in African-American culture
- Q11C Interest in Latin cultures
- Q13 Faith is filter for cultural choices (scaled)
- Q14 Preference for single vs. multi-sensory experience (either/or)
- Q15 Preference for safe vs. risky choice (either/or)
- Q17A Likes pre-performance talks (scaled)
- Q17B Likes post-performance discussions (scaled)
- Q19A [remixers] I love that art these days can be digitized and remixed, sampled and quickly adapted.
- Q19B [authenticity-seekers] I attach a high value to the authenticity and historical accuracy of art.
- Q19C [serenity-seekers] I tend to avoid performances of works that may leave me feeling sad or disturbed.
- Q19D [strong cultural roots] I take a strong interest in the artistic legacy and cultural heritage of my ancestors.
- Q19E [diversity-seekers] I strive to experience and appreciate a broad range of world cultures.
- Q19F [experience-seekers] I'll go see just about any performance, even if I'm not sure I'll enjoy it.
- Q19G [averse to political content] I tend to avoid performances with a strong political message.

Inner-Directed Values

- Q25A [strong relationship with the natural world] Supporting environmental causes and conservation efforts.
- Q25C [development of the creative self] Developing your creativity.
- Q25D [gregariousness] Always exploring, discovering, and hoping to be surprised.
- Q25F [life of the mind] Sharpening your mind; intellectual pursuits.
- Q25G [thought leader] Being on the cutting edge of new art and ideas
- Q25H [emotionally reflective] Reflecting upon, and processing, your emotions.
- Q25I [emotionally experiential] Feeling the extremities of emotion through art.
- Q25J [spiritual] Having a spiritual life
- Q25K [reject social norms] I instinctively challenge authority and make my own rules.

Q25L [achievement] I am driven to surpass my own limits in pursuit of excellence.

Outer-Directed Values

- Q26A [family cohesion] Strengthening family relationships
Q26B [socially gregarious] Making new friends and expanding your social network.
Q26C [civic engagement] Being involved in civic affairs and working on behalf of your community.
Q26D [inclined toward political expression] Voicing your political views.
Q26F [sense of philanthropic obligation] Re-paying society for the opportunities and good fortune you've had
Q26I [fantasy-seeker] Escaping to a make-believe world
Q26J [embrace technology] Adopting new technologies as quickly as possible

Six Dimensions of Preference [Composite Scores, based on Factor Analysis (see below)]

1. Classical (symphonic, chamber music, opera)
2. Jazz (all forms)
3. Dance/Visual
4. Narrative-Based Art Forms
5. Broadway/Entertainment
6. Folk/Ethnic/Multi-Cultural

Consumer Behavior/Lifestyle Variables

- Q6B Student status (Yes/No)
T_Q29A [social context is a pre-requisite] Going to live performances is a social occasion for me, not something I would do alone.
T_Q29B [spontaneity] I prefer to keep my options open, stay flexible and make plans closer to the event.
T_Q29C [price elastic] I usually buy the best seats available, without thinking about the cost too much.
T_Q31 [time barrier] How often do you pass up going to performances because of time constraints or schedule conflicts?
T_Q33 Inclination to Subscribe (a proxy for frequency of attendance)
T_Q34 [Initiator] Level of agreement with Initiator statement
T_Q28B Typically attends w/children
Buy_O Bought family/children's program
T_Q28D Typically attends w/friends
T_Q28E Typically attends w/alone
Q45 Political belief system (liberal/low to conservative/high)

Limitations of the Data

Caution should be used in interpreting the results due a number of limitations stemming from the data collection methodology. The survey effort encompassed fourteen college and university presenting programs, which, in their totality, are not representative of all presenters, or all college and university presenters. Thus, the segmentation results should not be imputed on other audiences.



When results are aggregated across all fourteen sites, these figures represent only a weighted average of these fourteen sites, and should not be used as a general model for all performing arts audiences.

Bias from Self-Selection

Past experience suggests that respondents to audience surveys tend to be those with closer connections to the organization sponsoring the survey, regardless of the method of data collection. Thus, results may over-represent those audience members with stronger bonds to the presenting organization. Since these respondents tend to be more familiar with programs and more involved with the organization, this bias is not necessarily a problem. Ticket incentives were used to increase the cooperation rate and to offset bias from self-selection.

Bias from Online Administration

Since the survey was administered online, the sample was limited to ticket buyers for whom the study partners had email addresses. Therefore, results are biased to the extent that respondents with email addresses differ systematically from those without email addresses. Previous research suggests an age bias in online survey results: respondents in the younger age cohorts are more likely to complete online surveys, while respondents in the older age cohorts are less likely to complete online surveys.

In order to understand the extent of this bias, the age distributions for two of the study partners (identified as Site 1 and Site 2) were compared against the age data from in-venue audience surveys conducted separately in the recent past, with the following results.

AGE DISTRIBUTIONS COMPARED: ONLINE VS. IN-VENUE

<u>Age Cohort</u>	<u>SITE 1 Online Survey</u>	<u>SITE 1 In-Venue Audience Survey</u>	<u>SITE 2 Online Survey</u>	<u>SITE 2 In-Venue Audience Survey</u>
18-34	36%	23%	27%	17%
35-44	17%	10%	18%	14%
45-54	24%	19%	23%	22%
55-64	17%	23%	21%	25%
65+	7%	26%	10%	22%

*percentages may not sum to 100% due to rounding

Online survey results did, in fact, over-represent younger audience members and under-represent older audience members, particularly those in the 65+ age cohort. For this cohort, results for the online survey under-represented figures from the audience surveys by a factor of 2 to 4. In other words, two to four times as many audience members in the 65+ age cohort were found in the in-venue surveys, compared to the online surveys. Therefore, in interpreting the results, the reader should bear in mind that younger respondents are over-represented and older respondents are under-represented in the model. The affect of age bias on the segmentation results is explored further in the next section.



PART 2: KEY FINDINGS

Preferences vs. Purchase Behaviors

One of the key research questions relates to the extent to which actual purchase behaviors align with levels of interest in seeing various types of live performances (i.e., behaviors vs. attitudes). Especially, we want to see the “other half of the glass” – how many people express high interest levels but do not purchase. This will give us some indication of latent demand, or at least unfulfilled interest. For this analysis we compare actual purchase data for the past two seasons (from ticketing data provided by the partners) with preference data from the survey questions. Recall that the purchase data is dichotomous (Yes or No) for 18 subcategories of events. The customer either bought a ticket in a given category over the past two years, or didn’t. The interest/preference questions were worded as follows:

*What is your level of interest in attending the following types of [dance/music/theater] performances?
(1=Low Interest, 7=High Interest)*

There are several different measures to examine here. The first is correlations. As expected, we find fairly strong correlations where we would expect them. For example, interest in attending ballet is correlated with purchasing ballet at the +0.20 level. (A perfect positive correlation is +1.00 and a perfect negative correlation is -1.00.) From a statistical standpoint, the relationship is extremely significant, meaning that we can conclude that the relationship between the two variables is not an independent one. They are correlated. This does not imply causality. Similar relationships were observed across the disciplines: Interest in going to various types of jazz concerts is correlated with jazz purchase data, and so forth. Generally, the correlation coefficients within categories are in the range of +0.20 to +0.30.

There are several interesting negative correlations. Interest in chamber music is negatively correlated with purchasing Broadway at the -0.22 level, and interest in opera is negatively correlated with purchase of Broadway and modern dance. This begins to suggest that there might be natural groupings of preferences, which will be discussed shortly. All in all, the correlation data is all very intuitive. It suggests that purchase data follows preference data to some extent, although we cannot conclude anything yet about latent demand.

One of the problems with the correlation analysis is that it includes purchase data across all the sites. But not all of the sites offer programming in every discipline. For example, UMS does not offer Broadway programs, although some UMS survey respondents reported high preference levels for Broadway. Similarly, only about half of the sites reported ballet purchase data. In order to look more closely at purchase vs. preference data, we need to narrow the focus to just the sites that offer programming in each category. Let’s take an example.

Ballet buyers (based on actual purchase data) are found at five sites. In other words, all patrons at those sites at least had an opportunity to purchase ballet over the past two years. If we select just those sites and compare purchase data with preference data, we find that:

- About half of those who actually purchased a ballet ticket reported the very highest interest level for attending ballet (i.e., a score of 7 on the scale of 1 to 7)
- A small but significant percentage of the people who actually bought ballet reported moderate or low interest levels (about 20%). In other words, some people who buy the tickets do not report high interest levels.
- Of the 723 respondents who reported the very highest interest level in ballet (i.e., a score of 7), 43% purchased ballet and 57% did not, presumably when they had an opportunity to do so.

This allows us to see the other half of the glass. If we can generalize about the total ballet audience at these combined sites, we would conclude that there are again as many ballet-lovers who are not buying as who are buying. Let's look at some site-specific examples.

Figures for University of Florida Performing Arts (UFPA), Clarice Smith Performing Arts Center at Maryland (UMD) and University Musical Society (UMS) were pulled for interest in modern dance vs. purchase of modern dance (past two seasons), with the following results:

	<u>UFPA</u>	<u>UMD</u>	<u>UMS</u>
% of all respondents who bought modern dance	9%	13%	16%
% of respondents who reported high interest in modern dance (6 or 7 on scale of 1-7), but who did not purchase modern dance in the past 2 years	35%	25%	27%
% who reported moderate to low interest in modern dance	<u>56%</u>	<u>62%</u>	<u>57%</u>
	100%	100%	100%

Based on this information, one can estimate that the number of people who say they love going to modern dance performances is about two to three times the number who actually bought modern dance in the past two years. This argues in favor of developing targeting strategies based on preference data, if it can be collected on a systematic basis.

It is also possible to look at preferences for art forms that are not presented at a site. For example, UMS does not present Broadway. However, 36% of UMS respondents expressed the very highest level of interest in seeing live Broadway shows. This compares with 38% of UMS respondents who reported the very highest level of interest in seeing Shakespeare, which UMS does present.

The overall conclusion here is that purchase data paints an incomplete picture of preferences and tastes. The analysis suggests that there are, most likely, many ticket buyers within the databases of these presenters who are very interested in the various disciplines but who have not purchased them in the past two years. Most people who actually buy a discipline report high or very high preference levels for it, as would be expected. For our modeling project, the implication is that we should use preference data, not purchase data, since preference data captures both active and latent demand.

Six Dimensions of Preference for Performing Arts Programs

A principal components analysis (PCA) was run on all of the 27 interest/preference variables. For example, the protocol investigated interest levels in seeing five different types of jazz concerts. PCA is similar to factor analysis. In this case, we use the analysis to identify underlying dimensions or groupings of preferences for different kinds of performances. The analysis produced six components or groupings of preferences. They are not entirely mutually exclusive, but quite intuitive. Both primary and secondary elements of the six components are identified, as follows:

1. **Preference Dimension #1: Classical art forms based in western tradition, primarily classical music**
Primary elements: symphonic, chamber music, opera
Secondary elements: Shakespeare, ballet
2. **Preference Dimension #2: Jazz**
Primary elements: Bebop, jazz fusion, Latin jazz, Swing or big band, New Orleans jazz
Secondary elements: Jazz or tap dance
3. **Preference Dimension #3: Dance/visual**
Primary elements: modern dance, ethnic dance, ballet, jazz or tap dance, acrobatic or circus
Secondary elements: world music, multi-media theatrical, Latin jazz
4. **Preference Dimension #4: Narrative-based art forms**
Primary elements: spoken word events, lectures/speakers, contemporary drama, multi-media theatrical
Secondary elements: Shakespeare, comedy
5. **Preference Dimension #5: Broadway/entertainment**
Primary elements: Broadway, comedy
Secondary elements: Swing or big band, acrobatic or circus, jazz or tap dance
6. **Preference Dimension #6: Folk or ethnic-based performance**
Primary elements: world music concerts, gospel music, bluegrass or Appalachian folk music, ethnic or folk dance
Secondary elements: none

Some of these dimensions are discipline-based while others are aesthetically or culturally-based. They are very intuitive. All this suggests is that people's preferences for performing arts programs cluster naturally around the disciplines. To simplify the cluster analysis, the 27 interest/preference variables were condensed into these six dimensions.

Gardner's Multiple Intelligences

Respondents were asked to self-diagnose their multiple intelligences, based on questions designed to address each of Howard Gardner's multiple intelligences.¹⁰ This line of questioning follows up the hypothesis that people are attracted to various art forms in part because of their innate intelligences. The design of the question was as follows:

"How well does each of the following statements describe you?" (scale: 1=Not At All to 7=Extremely Well)

1. [Linguistic Intelligence] *I'm a language-oriented person and excel naturally at writing and speaking clearly and persuasively.*
2. [Logical-Mathematical Intelligence] *I excel at logical analysis and mathematical computation.*
3. [Bodily-Kinesthetic Intelligence] *I'm a kinetically-oriented person with excellent coordination and a keen sense of movement.*
4. [Musical Intelligence] *I'm a musically-oriented person with a good ear for harmony and melody.*
5. [Visual/Spacial Intelligence] *I'm a visually-oriented person, attuned to color, texture and form, and love to manipulate images in my mind.*
6. [Naturalist Intelligence] *I'm a naturalist, with a strong sense about plants, animals and the elements of nature.*
7. [Interpersonal Intelligence] *I'm naturally good at interpersonal relations; I understand what motivates people and am very good at working out people problems.*
8. [Intrapersonal Intelligence] *I'm particularly in tune with my own feelings, goals, fears and strengths.*
9. [Existential Intelligence] *I'm inclined to ponder the larger questions about life, destiny and the supernatural.*

Generally, the questions generated good statistical distributions. The highest average rating was reported for Linguistic Intelligence (average of 5.1 on a scale of 1 to 7). This undoubtedly reflects the high education levels in the sample. In comparison, the average scores for all the intelligences are somewhat lower in the national consumer sample. The lowest average rating was reported for Bodily Kinesthetic Intelligence (average of 4.2 on a scale of 1 to 7). Of course, we must be careful not to make too much of the results, given that respondents were asked to self-diagnose. Many undoubtedly exaggerated their intelligences. The results, however, are intuitive.

- Women were more likely to report higher scores for the Interpersonal and Intrapersonal Intelligences
- Men were much more likely than women to report higher scores for Logical-Mathematical Intelligence
- No substantial differences were observed across the age cohorts, except that respondents in the 65+ age cohort generally reported lower scores across all the intelligences.

The correlations between the various intelligences are quite high, suggesting that they move together. The exception is Logical-Mathematical Intelligence. This Intelligence is only weakly correlated with the others, and, in fact, is negatively correlated with Interpersonal Intelligence.

With respect to correlations between the nine intelligences and preferences for types of performing arts programs, results are very intuitive, and also a little surprising:

¹⁰ Frames of Mind: The Theory of Multiple Intelligences, Howard Gardner, 1983, 1993, published by Basic Books, a member of the Perseus Books Group.

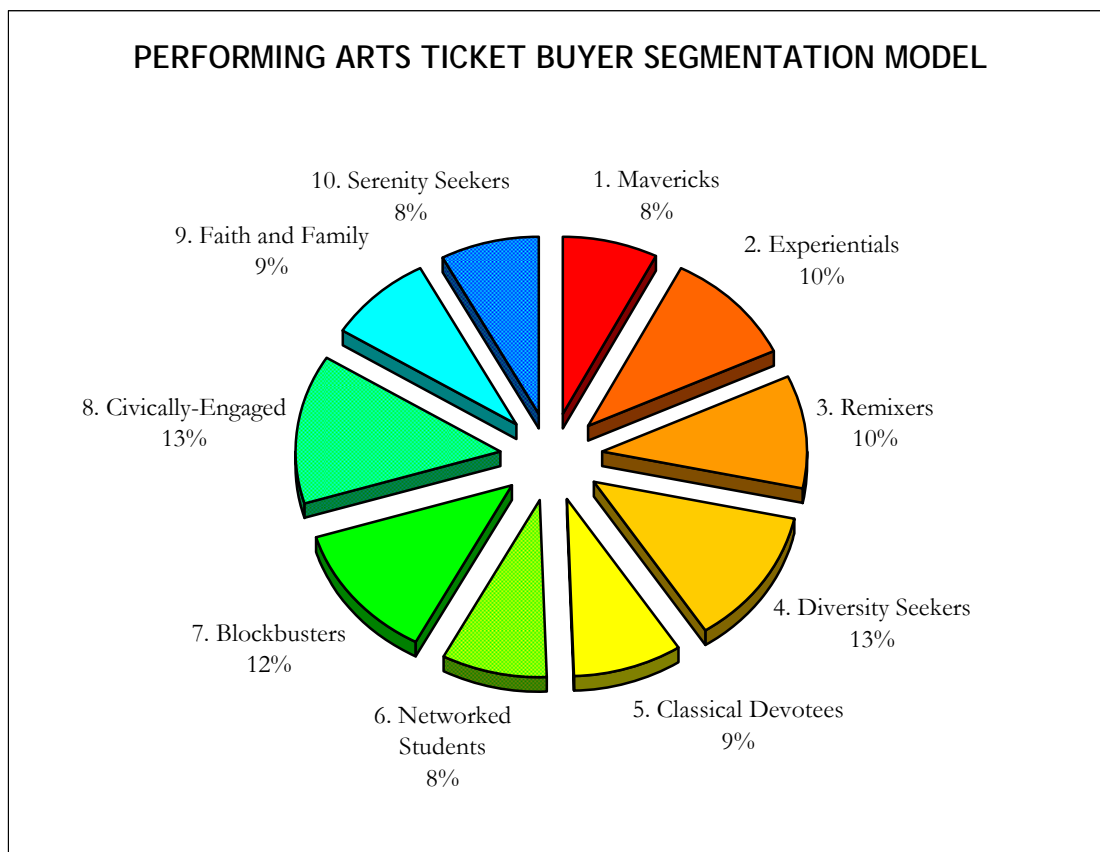
- Musical Intelligence correlates most highly with preference for classical music, chamber music and opera – and less so with jazz.
- Linguistic Intelligence correlates most highly to preference for Shakespeare, contemporary stage plays and spoken word events, and correlates negatively to preference for Broadway.
- Logical-Mathematical Intelligence is not correlated very highly with anything, although it is moderately correlated with preference for classical music.
- Bodily-Kinesthetic Intelligence correlates most highly with preference for all forms of dance, but also with jazz and world music.
- Visual/Spacial Intelligence correlates most highly with modern dance, and also world music and jazz.
- Naturalist Intelligence correlates most highly with world music and ethnic or folk dance.
- Interpersonal Intelligence correlates most highly with preference for multi-media theatrical programs and spoken word events.
- Existential Intelligence correlates most highly with interest in spoken word events, lectures on current topics and Shakespeare.

Jazz seems operate on several levels of intelligence, including musical, bodily-kinesthetic and spacial/visual. World music concerts operate primarily on naturalist and visual/spacial intelligences, and also bodily-kinesthetic to a lesser degree. Modern dance operates equally on the visual/spacial and bodily-kinesthetic levels.

These variables were not allowed into the cluster analysis, but are used in some segmentation descriptions. Mostly, this line of questioning was an experiment to see if respondents could answer the questions about their own intelligences, and if the intelligences could be related to performing arts consumption. They can. Much more research is needed to further understand these relationships and how to employ this information in a marketing sense.

PART 2 – PERFORMING ARTS TICKET BUYER SEGMENTATION MODEL

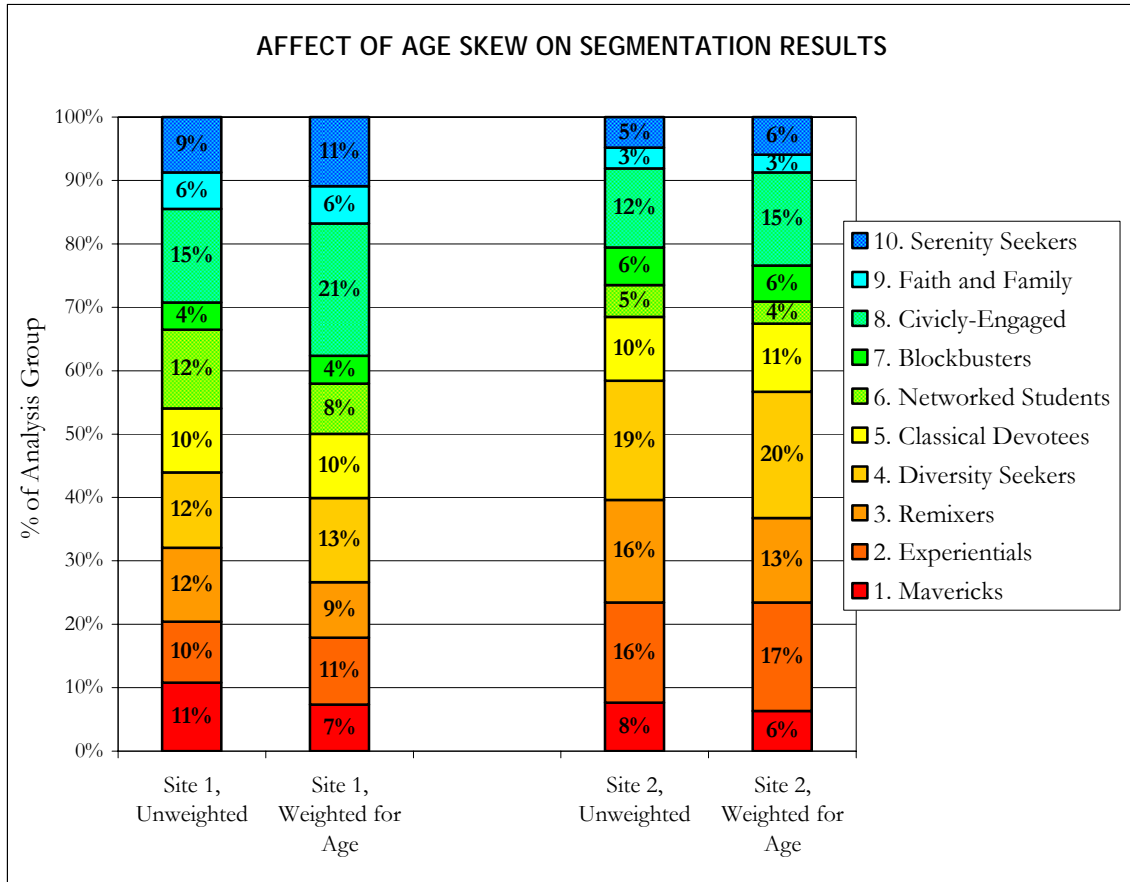
An overview of the 10 segment customer model appears in the pie chart below. The segments are ordered from highest to lowest by risk tolerance. In other words, Mavericks (segment 1) were most likely to report that they would prefer to attend a program that is “a riskier proposition in that the meaning of the work might be unclear, and you may love it or hate it, depending on how it goes” while Serenity Seekers (segment 10) were most likely to report that they’d prefer to attend a program that “is sure to be enjoyable and straightforward in terms of subject matter.” While risk tolerance was not a defining characteristic of every segment, it seemed to be the most useful dimension for ordering the segments, given the wide range of presentations offered by the study partners and given that some of the study partners make a practice of presenting unfamiliar artists and challenging work.



Each of the segments is described in the section that follows. Some segments are quite distinct in that they are defined by a small number of variables (e.g., Networked Students), while other segments are less distinct from the others and more general in nature. This is a natural result of the cluster analysis methodology. It is often the case that a small percentage of respondents fall into a residual segment that is not particularly well-defined. In our model, this is Segment 8 – Civically-Engaged.

Affect of Age Bias on Segmentation Results

To understand the affect of the “online age bias” on segmentation results, weights were applied to the online data for the sites for which audience survey data were available, and segmentation results were re-calculated. Results are illustrated in the following chart.



When the results are adjusted for age, several segments are impacted significantly. As would be expected, these are the segments most closely associated with students and with older adults. For example, Segment 6 – Networked Students shrinks from 12% to 8% for Site 1, and from 5% to 4% for Site 2. Similarly, Segment 1 – Mavericks, which is 51% students, also shrinks. Conversely, several segments which contain relatively larger percentages of older adults increase when adjusted for age, particularly Segment 8 – Civically-Engaged, but also Segment 10 – Serenity Seekers.

The point of this analysis is to illustrate that the proportionality of the segmentation model is not perfectly representative of the actual audience base, given the limitations of online surveying. This does not invalidate the segments themselves – they are, in fact, all present in each of the partners’ audiences to some extent. However, the partners should bear in mind that some segments are actually larger or smaller within their audience base.

Segmentation Results by Site

Each of the study partners presents a different mix of performing arts programs. While the segmentation model reflects the totality of customers across the 14 programs, there is substantial variation across the 14 sites. The table below reports the segment percentages for each site.

SEGMENTATION RESULTS BY SITE (UNWEIGHTED)											
TICKET BUYER SAMPLE SOURCE	N	Mavericks	Experientials	Remixers	Diversity Seekers	Classical Devotees	Networked Students	Blockbusters	Civically- Engaged	Faith and Family	Serenity Seekers
UFPA	594	7%	8%	9%	12%	8%	7%	15%	13%	11%	9%
Clarice Smith Center	514	9%	10%	11%	11%	12%	5%	7%	17%	7%	11%
ASU Gammage	360	1%	10%	5%	7%	4%	4%	41%	6%	20%	3%
Mondavi Center	468	3%	12%	10%	17%	7%	2%	13%	16%	10%	8%
UMS	1145	11%	10%	12%	12%	10%	12%	4%	15%	6%	9%
Lied Center, Nebraska	564	10%	8%	13%	10%	17%	12%	7%	6%	11%	5%
Hancher Auditorium	423	4%	10%	8%	14%	5%	7%	19%	14%	11%	7%
Krannert Center	742	11%	9%	11%	10%	8%	15%	9%	10%	10%	7%
Lied Center of Kansas	246	5%	11%	11%	14%	7%	4%	15%	15%	13%	6%
Penn State	301	10%	6%	7%	7%	7%	19%	19%	10%	8%	7%
Cal Performances	457	8%	16%	16%	19%	10%	5%	6%	12%	3%	5%
Stanford Lively Arts	307	8%	17%	8%	13%	16%	7%	6%	12%	4%	10%
Hopkins Center	427	4%	8%	10%	15%	7%	3%	13%	23%	7%	9%
Annenberg Center	228	10%	13%	13%	16%	7%	11%	14%	9%	6%	3%
Cross-Site Avg.	6212	7%	11%	10%	13%	9%	8%	13%	13%	9%	7%

*The highest observations within each segment are bolded.

Results are intuitive. For example, the segmentation profile for ASU Gammage, with its large Broadway program, is concentrated in two segments, Blockbusters (41%) and Faith and Family (20%). Penn State's segmentation profile includes the largest percentage of Networked Students (19%), which is over twice the average for this segment and reflective of the large proportion of students among Penn State respondents.

Generally, Cal Performances respondents were most likely to fall into the top four risk-seeking segments while ASU Gammage respondents were least likely to fall into these segments (58% vs. 23%, respectively).

In interpreting these results, it is important to remember the limitations of the data. Also, it is important to bear in mind that these figures represent a cross-section of current buyers (i.e., those with known email addresses), and do not represent the universe of prospects/non-buyers.

Segment 1: Mavericks

The most risk-seeking of all segments, Mavericks are younger, fearless, values-driven cultural consumers who reject the status quo and want to be shaken up. Over 80% prefer a riskier alternative over a sure choice. They are fussy, very price sensitive and quintessentially adventurous – the most likely of all segments to see themselves as always exploring, discovering and hoping to be surprised. Two thirds are under age 35 and six in ten are students, although they are not your typical socially-motivated students. While most say that they typically attend with friends (75%), they are also most likely of all segments to attend alone (65%, respondents could choose more than one option). In other words, it is the challenge of the art that attracts them, not the social trappings. As might be expected, they are most likely of all segments to be artists themselves and most likely to value development of the creative self. While they are least likely to be interested in civic affairs, they are drawn to politically-charged content. Not surprisingly, they also consider themselves to be thought leaders, so they approach the arts experience on multiple levels – emotional, intellectual and creative.

Mavericks are hard core, fantasy-seeking theater-goers. Within the theatrical realm, their tastes run the gamut from Shakespeare to multi-media performance art, although they wouldn't be caught dead at a Broadway show. Mavericks don't particularly care for traditional classical music, although they are most likely of all segments to be interested in hearing classical music by living composers. They score highly on linguistic intelligence and are most likely of all segments to exhibit existential intelligence. Tickle their imaginations with ponderous questions and unsolvable puzzles and let their over-active minds complete the exchange. Remember, however, that most Mavericks are students and do not yet have broad cultural tastes or the wallet to enjoy them.

Positive Indicators

- Risk-seeking, adventurous (highest), fantasy-seeking (highest)
- Development of the creative self (highest)
- Emotionally experiential (highest)
- Thought leader (highest)
- Reject social norms (highest)
- Linguistic intelligence
- Existential intelligence (highest)
- Linguistic art forms (highest)
- 20th century music
- Visual artists and performing artists (highest)
- Downloading music
- Liberal political beliefs
- Spontaneous purchase / keep options open
- Visit web sites with cultural information

Negative Indicators

- Having a spiritual life
- Inclination to subscribe
- Broadway shows
- Social occasions
- Serenity-seeking
- Family cohesion



Segment 2: Experimentals

While Mavericks act as curators on their own behalf, Experimentals are along for the full ride, even if it's sometimes a bumpy one. They have money, they are inclined to subscribe, and they are most likely of all segments to buy multiple types of shows. Experimentals have a big appetite for risk (80% prefer the risky alternative), but they are not fantasy-seekers and they are least likely among the top four segments to be inner-directed in terms of values. In other words, they want their arts experience to be curated for them. They are most likely of all segments to define themselves as experience-seekers (e.g., "I'll go see just about any performance, even if I'm not sure I'll enjoy it"), and also consider themselves to be thought leaders. What distinguishes them from other risk-seeking segments is that they are not as emotionally vulnerable – they're less likely than other culture vultures to want the emotional ride. Their preferences are above average for most disciplines, although they are more inclined toward contemporary art forms, including contemporary dance and drama (highest of all segments). Their appetite for new works by living artists is strong for theatre and dance, but not music. Their interest in world music and dance is just average, perhaps because they do not have a strong sense of their own cultural roots.

Generally, Experimentals attend as couples (80% typically attend with their spouse), although 45% also say that they typically attend with friends. They are most likely to be middle-aged and working full-time and, not surprisingly, are advance planners and most likely of all segments to buy the best seats without thinking about the cost. They like educational enhancements, but not too much. Think of them as the previous generation of Mavericks, now grown up. They are still attracted to politically-charged content, but their days of college grunge are long gone. Make them feel like the progressive thinkers that they are, but don't push them too hard.

Positive Indicators

- Prefer riskier alternative over safer choice
- Attracted to political content
- Stage plays - contemporary drama (highest)
- Occupational status: working full-time (highest)
- Area of study, research or teaching: literature, languages, history
- Multi-buyers (4+ types of shows purchased)
- Inclination to subscribe

Negative Indicators

- Strong cultural roots
- Having a spiritual life
- Age 18-34
- Cost is a barrier

Segment 3: Remixers

Remixers are culturally-directed urban arts omnivores. Their distinguishing characteristics are an interest in hip hop/contemporary culture, African-American culture and Latin cultures. They are most likely of all segments to have strong cultural roots of their own, and value diversity a great deal. They believe in social justice and equal opportunity, and embrace technology. As audiences go, they are younger, but generally not students.

With respect to preferences, Remixers are multi-sensory and multi-dimensional. They are most likely of all segments to consume modern dance (they are twice as likely as the average patron to enjoy new dances by living choreographers), and they are also most likely to enjoy world music and all forms of jazz, especially jazz fusion and Latin jazz. However, they are not big on classical music or Broadway shows. In comparison to Mavericks, who are linguistically-oriented, Remixers exhibit multiple intelligences, and score highest on Bodily-Kinesthetic Intelligence (they love social dancing) as well as Visual/Spatial Intelligence (two-thirds are visual artists of some sort), so they are likely to find imagery especially powerful.

Remixers are also distinguished by their social motivations, evidenced by a high level of interest in expanding their social network. Not surprisingly, they are most likely of all segments to be Initiators (i.e., to organize cultural outings for their friends). As such, they are prime targets for social network marketing efforts. Remixers are active, highly engaged participants. They relate to art intellectually, emotionally and creatively, and need to process the experience and actively participate in the making of meaning.

Positive Indicators

- Strong cultural roots
- Desire to experience and appreciate a broad range of world cultures (highest)
- Interested in cultures other than my own (highest)
- Interest in specific cultures (highest in all categories)
- Preference for jazz (highest for all genres of jazz)
- Preference for world music (highest)
- Preference for ethnic/folk dance (high)
- Preference for multi-media theatrical programs or performance art (highest)
- Preference for spoken word events (highest)
- Prefer multi-sensory experience
- Pre-performance talks, post-performance discussions (highest)
- Visual artists and performing artists
- Area of study, research or teaching: visual art, design or architecture
- Social dancing, acting
- Loyalty to the presenter
- Typically attends with friends, Initiators (highest), postcards in the mail (highest), radio
- Like email from cultural organizations (highest)
- Cultural organization web sites (highest), other web sites
- Bodily-Kinesthetic Intelligence (highest), Visual/Spatial intelligence (highest)

Segment 4: Diversity-Seekers

Diversity-Seekers are card-carrying world cultural citizens. They are the most outer-directed of all segments, both in terms of civic engagement and in terms of their sense of philanthropic obligation – they feel a strong sense of duty to mankind. A defining characteristic of Diversity Seekers is their close relationship to the natural world. As might be expected, they report the highest levels of Naturalistic Intelligence (i.e., “I’m a naturalist, with a strong sense about plants, animals and the elements of nature.”) As the most emotionally-reflective segment, they have an innate ability and desire to empathize with people who are different than themselves. Not surprisingly, they are very interested in other cultures, although not as much as Remixers, and they are not interested in urban/hip hop scene. With a risk tolerance only slightly above average, the promise of an emotional connection with the artist is likely to be more compelling than an intellectual connection. They are open to new works by living artists, at least in dance and theatre, but their interest in enhancement events is just average.

Diversity-Seekers want the original version, not the remix. Authenticity is important to them. They are most interested in world music (including Latin jazz), folk music and ethnic or folk dance. But they also report above-average interest in traditional art forms, suggesting that experiencing a variety of art is important to them. Eight in ten Diversity Seekers are female. They are social creatures, and are most likely among the top five segments to attend with children (43%) – suggesting a strong nurturing instinct. In a way, Diversity-Seekers are grown up Remixers (10 years older, on average). Make them feel like responsible citizens, and provide them with opportunities to understand the world around them and nurture the people they care about.

Positive Indicators

- Interested in cultures other than my own (high)
- Desire to experience and appreciate a broad range of world cultures
- Social justice and equal opportunity, sense of duty to mankind (highest)
- Support environmental causes (highest)
- Keeping up with world events and why things happen
- Involved in civic affairs (highest)
- Social justice and equal opportunity
- Having a spiritual life, valuing family cohesion (highest)
- Preference for world music (high)
- Preference for ethnic/folk dance (high)
- Hearing musicians introduce their pieces from the stage (highest)
- Females (79%)
- Occupation: primary or secondary school teacher
- Occupation: human services
- Belong to book clubs, do visual arts activities
- Loyalty to the presenter
- Typically attends with friends
- Listen to radio, read local/regional newspaper
- Naturalist intelligence (highest), existential intelligence
- Involved in cultural orgs. as a volunteer, community gardening, community service

Segment 5: Classical Devotees

Classical Devotees embrace the western classical tradition – most notably classical music, chamber music and opera – but also ballet and Shakespeare. Of all segments, they score themselves highest in terms of musical intelligence, although their tastes in music are not eclectic. They report below-average interest in jazz and world music, and are below-average in terms of diversity-seeking and risk tolerance. Two-thirds of Classical Devotees would choose ‘a sure choice’ over ‘a riskier alternative,’ although they are not nearly as fearful of the unfamiliar as Serenity Seekers (segment 10). Compared to some other segments, Classical Devotees are not very values-driven, with the exception of the emotional experience, which they seek out. They value a life of the mind, but are not particularly likely to consider themselves to be thought leaders. They want to be better appreciators of the art forms and are most likely of all segments to enjoy pre-performance talks. They read program notes and seek out context in order to more fully appreciate their classical fare.

Their interest in culture does not stem from a sense of connectedness with the world around them. Classical Devotees report particularly low levels of outer-directed values, so they are not likely to be civically engaged and they shy away from political expression. Their interest in specific cultures is well below average with one exception – Asian cultures, for which their interest is average. Hip hop is anathema to them. Going out to live performances is not a social occasion for Classical Devotees. Rather, they are more interested in the solitary experience of what happens when the house lights dim and the artists take the stage. Not surprisingly, they are almost as likely to attend alone as they are to attend with a spouse/partner or with friends.

Classical Devotees are much less likely than Experienceals to purchase multiple types of events, and their inclination to subscribe is below average. Sell them on the program, not on the abstract values or social dimensions of the experience. Challenge them a little, and help them leave the performance feeling like they are a better appreciator.

Positive Indicators

- Preference for symphonic music, chamber music, opera (highest for all three)
- Pre-performance talks (highest)
- Area of study, research or teaching: music
- Playing an instrument
- Typically attends alone
- Musical intelligence (highest)

Negative Indicators

- Adopting new technologies
- School or youth-oriented groups

Segment 6: Networked Students

Student status figures prominently in two segments – Networked Students and Mavericks (92% vs. 61%, respectively). When it comes to preferences and values, however, these two segments are a study in contrasts. While Mavericks are extreme risk-takers, Networked Students prefer to play it safe – three quarters would choose ‘a sure choice’ over ‘a riskier alternative.’ They are undistinguished from other segments in terms of cultural attitudes and values, except that they value achievement more than any other segment (i.e., “I am driven to surpass my own limits in pursuit of excellence.”). One might deduce from this a certain interest in virtuosity. Not surprisingly, they rate themselves highest of all segments for Logical-Mathematical Intelligence.

With respect to preferences for types of arts programs, Networked Students don’t really have them yet. They express average interest levels for all types of music, dance and theatre with several exceptions. Their interest in Broadway shows and comedy troupes is higher than average. They are fantasy-seekers, but their interest in linguistic art forms is below average. They tend to avoid political content and have slightly more conservative political beliefs compared to the average ticket buyer.

The average age for Networked Students is 25, the youngest of all segments. They are socially gregarious, attend with friends and include the second highest percentage of Initiators. Not surprisingly, they are also most likely of all segments to say that they typically attend with their parents. Of course, they are late buyers and are very cost conscious. They have low levels of loyalty to the presenting program and are more likely than average to be Business or Engineering students. For Networked Students, attendance at arts programs is heavily cloaked in a social agenda. Thus, marketing programs that help them create social context (i.e., facilitating attendance in small social groups) is a key to unlocking their participation.

Positive Indicators

- Preference for Broadway musicals (high)
- Age 18 – 34 (93%)
- Performing artist
- Typically attends with friends (highest)
- Initiators
- Short planning horizon
- Downloading music (highest)
- Playing an instrument
- Read campus newspaper
- Price sensitive
- Logical-mathematical intelligence (highest)

Negative Indicators

- Inclination to subscribe

Segment 7: Blockbusters

True to their name, Blockbusters are consumers of popular entertainment. They want multi-sensory entertainment that is not challenging, including Broadway shows, comedy and acrobatic or circus acts. Generally, they report lower than average scores for all values except family cohesion and adopting new technologies, and they are particularly unlikely to value a life of the mind. With respect to preferences, they report average levels of interest in contemporary drama, although this interest does not extend to Shakespeare. The other art form they like is jazz, but the popular side of jazz (e.g., swing or big band music). They are least likely of all segments to be interested in classical music, and very much avoid programs that take them outside of their own culture. As might be expected, they are averse to political content and are more likely than average to have conservative political views. In general, however, they are not spiritually-directed and are unlikely to report that their faith is a filter for culture choices.

Price isn't their issue – Blockbusters are more likely than any other segment to buy the most expensive seats without thinking about it. Rather, social context is their overriding issue. They are most likely of all segments to agree that “going to live performances is a social occasion for me, not something I would do alone.” As a result, they are unlikely to attend without their spouse/partner. They are also most likely of all segments to attend with their children (50%), so they are a key segment for family programs along with Diversity Seekers and Faith and Family. Blockbusters are willing to pay for a good time, although, one imagines, they need to be well-assured that they're going to enjoy the program, that they won't have to work too hard to understand it, and that it will be appropriate for the whole family.

Positive Indicators

- Preference for Broadway musicals (highest)
- Preference for comedians or comedy troupes (highest)
- Prefer multi-sensory experience (highest)
- Age 35-54
- Presence of children in the household (highest)
- Occupation: Health care or public health
- Occupation: Business administration or consulting
- Social occasion
- Typically attends with spouse/partner
- Typically attends with my children

Negative Indicators

- Strong cultural roots
- Belonging to political organizations
- Musical intelligence
- Linguistic intelligence

Segment 8: Civically-Engaged

Civically Engaged ticket buyers are notable for their deep roots in the community and for their outer-directed values. Their community involvement takes numerous forms. They are most likely of all segments to belong to neighborhood associations, book clubs, community service groups and especially political organizations or campaigns. Underlying these activities is a strong sense of commitment to social justice and civic duty. Their political views are quite liberal, and they are most likely of all segments to value political expression, an interest that follows them into the theatre. Their value system is not inner-directed, however, and they are half as likely as Diversity Seekers to be interested in cultures outside of their own.

In most other respects, Civically-Engaged ticket buyers are not remarkable or particularly distinct from their counterparts in other segments, except that they are more likely to be current or retired faculty, and they are quite a bit more likely to work in the health care field. They have the highest average age of any segment (52), which is undoubtedly even higher given the skew towards younger respondents. Accordingly, they are twice as likely as the average respondent to be retired, which translates into an above-average inclination to subscribe and a wide breadth of interest. Unlike Experientials, the other segment that likes to subscribe, the Civically Engaged segment is highly risk averse, with 90% preferring 'a sure choice' over 'a riskier alternative.'

Their tastes are eclectic but conservative, leaning towards classical music and Broadway and away from dance and jazz, but it is not their tastes that define them as a segment. They have a moderate appetite for educational enhancements, especially printed matter, and they are likelier than average to respond to brochures and advertisements in their local/regional newspaper. Presenters can speak to Civically-Engaged ticket buyers with programming and marketing that trades in the currency of social justice and by providing them with opportunities to actively invest in their community.

Positive Indicators

- Keeping up with world events and why things happen
- Involved in civic affairs, voicing your political views (highest)
- Social justice and equal opportunities
- Age 65+
- Occupational status: retired
- Typically attends with spouse/partner
- Faculty (current or retired), alumni
- Multi-buyers (4+ types of shows purchased)
- Inclination to subscribe
- Local/regional newspaper
- Involved in neighborhood associations, library and book groups, community services orgs., and political organizations (highest for all)

Segment 9: Faith and Family

Faith and Family buyers are spiritually-directed in their cultural consumption. A majority say that their religious background or faith influences the types of arts programs that they attend. Like their older counterparts in Segment 10, they very much seek serenity and tend to avoid performances that are sad, depressing or disturbing. Except for their strong religious orientation, they are not inner-directed in terms of values and are especially uninterested in environmental causes and conservation efforts. Family cohesion stands out as the only outer-directed value that they feel strongly about. Politically, they are extremely conservative (a defining characteristic). They are most likely of all segments to be offended by vulgar language or sexually suggestive content and least likely of all segments to say that they reject social norms.

In terms of preferences, Faith and Family buyers tend to dislike the linguistic art forms and prefer Broadway as well as folk/ethnic music and dance, especially Gospel music. Their interest in other cultures is about half that of the average buyer, with the exception of Native American cultures, which is somewhat higher (but still below average). With respect to social context, they are second most likely of all segments to attend with their children (48%) and most likely of all segments to report that their parents live in the same household or close by, making them a key segment of family buyers. Price sensitivity is a major factor – they are the second most cost conscious segment, behind Mavericks. Hence, the Faith and Family Segment is likely to respond to family discount offers for specific programs that pass muster as spiritually-acceptable entertainment.

Positive Indicators

- Having a spiritual life (highest)
- Valuing family cohesion
- Involved in faith-based organizations (highest), youth organizations
- Conservative political views (highest)
- Preference for Broadway musicals (high)
- Preference for gospel music (highest)
- Avoid performances that are sad, depressing or disturbing
- Averse to political content
- Offended by vulgar language, sexually suggestive content (highest)
- Presence of children in the household
- Occupation: Health care or public health
- Singing (highest)
- Craft-making (highest)
- Parents live in the same household, or nearby
- Social occasion
- Typically attends with spouse/partner
- Typically attends with my children
- Cost is a barrier

Negative Indicators

- Risk tolerance
- Multi-buyers

Segment 10: Serenity Seekers

The promise of calmness, familiarity and a happy ending is what brings Serenity Seekers out to the theatre. They are defined by their aversion to political content, their avoidance of programs that they believe will be sad or disturbing, and their attraction to the authenticity and historical accuracy of the art. They'll do anything to avoid emotionally-taxing arts experiences and are least likely of all segments to consider themselves as thought leaders. They are also defined as preferring single-sensory experiences over multi-sensory experiences. Not surprisingly, they tend to have conservative political views and are farthest away of all segments from the cutting edge of new art and ideas.

Serenity Seekers are a key segment of the symphonic and chamber music audience, with very high preference levels for both. Compared to Classical Devotees, they have a much smaller appetite for 20th century music and almost no appetite for new pieces by living composers. They are least likely of all segments to like all forms of dance, and least likely to like anything linguistic that might challenge them. Socially, they are least likely to attend with friends, least likely to be Initiators, and most likely to attend with their spouse or partner. While Serenity Seekers self-diagnose as having above-average Logical-Mathematical Intelligence, they report below average scores for all other intelligences, especially Visual/Spatial Intelligence as well as the Interpersonal, Intrapersonal and Existential Intelligences. They are clearly not pondering the larger questions in life. Interestingly, they are most likely of all segments to be male (56%).

Serenity Seekers will respond to programs that fit comfortably within their cultural self-conception as consumers of traditional arts experiences, primarily music. Assure them with language that conveys calmness, peacefulness and inspiration – minus the emotional edge.

Positive Indicators

- Attach a high value to authenticity and historical accuracy (highest)
- Avoid performances that are sad, depressing or disturbing (highest)
- Prefer single-sensory experience
- Averse to political content
- Conservative political views
- Age 65+
- Males (56%)
- Occupational status: retired
- Typically attends with spouse/partner (highest)
- Area of study, research or teaching: engineering, math or physics
- Logical-mathematical intelligence

Negative Indicators

- Diversity-seeking
- Fantasy-seeking
- Risk tolerance (lowest)
- Appetite for new work (lowest)
- Hearing musicians introduce their pieces from the stage (lowest)
- Bodily-kinesthetic intelligence, visual/spatial intelligence (lowest)
- Age 18-34

PART 3 – SEGMENT CHARACTERISTICS (LOOK-UP TABLES)

This section presents look-up tables for all of the survey variables, including segmentation variables (i.e., those variables that were used in the cluster analysis) and descriptive variables (i.e., those variables that were included for descriptive purposes but not allowed to drive the cluster analysis). These tables may be used for two purposes: 1) to develop a more nuanced profile of each segment, since it is not possible to incorporate all of the variables in the narrative descriptions in the previous section, and 2) to cross-reference specific variables or customer characteristics with the segmentation model.

For example, use these tables to see which segments express a strong preference for Shakespeare, or which segments are most likely to attend with children, or which segments are most likely to report naturalistic intelligence. This might be a helpful approach to conceiving single ticket or subscription campaigns featuring artists or attractions that appeal to specific values, intelligences or lifestyle segments.

Segmentation Results for Buyers Types

As discussed earlier, preference variables were included in the cluster analysis, as opposed to actual purchase data, since we found that purchase data paints an incomplete picture of preferences. After the model was created, however, it was possible to classify actual buyers into the ten segments based on purchase data provided by the study partners.

The table below reports the segment percentages for each of 17 buyer types. To use this table, choose a buyer type and read across to see what percentages fall into the various segments. Remember, the customer model is based on attitudes and preferences, but not purchase data. So, it is not surprising to find that all segments are represented to some extent within each of the 17 buyer groups.

SEGMENTATION RESULTS FOR BUYERS (BASED ON ACTUAL PURCHASE DATA)	N	Mavericks	Experientials	Remixers	Diversity Seekers	Classical Devotees	Networked Students	Blockbusters	Civically-Engaged	Faith and Family	Serenity Seekers
Ballet	728	7%	11%	9%	13%	7%	13%	15%	11%	7%	6%
Modern Dance	1293	9%	16%	15%	15%	8%	8%	9%	12%	5%	5%
Other dance (jazz, tap, hip hop)	510	4%	12%	11%	12%	5%	7%	24%	11%	10%	4%
World music and dance	2113	7%	12%	13%	16%	8%	8%	10%	14%	6%	7%
Symphonic music	1071	8%	10%	5%	11%	12%	11%	5%	19%	7%	12%
Chamber music	924	8%	12%	7%	12%	13%	7%	6%	21%	4%	11%
Opera, vocal recitals, vocal ensembles	1323	7%	10%	7%	12%	11%	8%	8%	19%	8%	10%
Jazz or blues	1333	9%	13%	12%	13%	7%	8%	9%	15%	5%	9%
Broadway	736	3%	9%	6%	10%	5%	7%	28%	11%	14%	6%
Stage plays	798	10%	14%	12%	14%	9%	7%	8%	17%	3%	5%
Multi-media, multi-disc. or perf. art	675	13%	16%	16%	13%	7%	6%	8%	14%	4%	3%
Comedy artists and attractions	257	3%	12%	11%	18%	6%	4%	16%	19%	5%	6%
Lectures or Speakers	251	8%	17%	12%	18%	8%	4%	5%	22%	3%	4%
Family/children's programs	1518	5%	9%	9%	14%	4%	7%	24%	13%	11%	5%
Urban artists	281	12%	16%	20%	13%	4%	8%	9%	11%	3%	4%
African or African-American	1539	8%	13%	15%	14%	6%	6%	10%	16%	6%	6%
Student ensembles (any discipline)	1189	9%	9%	11%	11%	9%	10%	8%	17%	8%	9%
Cross-Site Avg.	6212	8%	12%	11%	13%	8%	7%	11%	17%	6%	7%

*The highest observation within each segment is bolded.

Results are intuitive. For example, 12% of symphonic music buyers are classified as “Serenity-Seekers,” which compares to the average figure of 7% for this segment. Similarly, 28% of Broadway buyers are classified as “Blockbusters,” compared to 11% on average.

Demographic Profiles by Segment

DEMOGRAPHIC CHARACTERISTICS BY SEGMENT	Total Sample	Mavericks	Experientials	Remixers	Diversity Seekers	Classical Devotees	Networked Students	Blockbusters	Civically-Engaged	Faith and Family	Serenity Seekers
GENDER											
Female	65%	62%	53%	74%	79%	58%	70%	71%	62%	68%	44%
Male	35%	38%	47%	26%	21%	42%	30%	29%	38%	32%	56%
AGE COHORT											
18 - 34	28%	68%	12%	43%	15%	22%	93%	15%	10%	21%	13%
35 - 44	18%	12%	20%	22%	20%	17%	4%	27%	12%	22%	15%
45 - 54	25%	12%	32%	24%	30%	29%	2%	32%	28%	28%	25%
55 - 64	19%	6%	25%	10%	26%	22%	1%	19%	30%	21%	24%
65+	9%	1%	11%	2%	9%	10%	0%	8%	20%	8%	22%
Average Age	45	32	50	38	49	47	25	47	53	46	52
PRESENCE OF CHILDREN											
Age 0 - 6	8%	3%	10%	10%	15%	4%	4%	21%	12%	15%	8%
Age 7 - 12	12%	4%	10%	13%	16%	7%	3%	23%	11%	22%	11%
Age 13 - 17	12%	3%	10%	13%	13%	10%	4%	19%	14%	19%	10%
Any Child Under 18	26%	8%	22%	27%	30%	17%	10%	43%	25%	40%	23%
PARENTS LIVE IN THE SAME HOUSEHOLD OR CLOSE BY											
Percent "Yes"	24%	19%	19%	30%	20%	21%	24%	29%	22%	34%	21%
OCCUPATIONAL STATUS											
Working full-time	56%	36%	71%	63%	65%	60%	13%	70%	55%	58%	55%
Retired	12%	1%	16%	4%	12%	14%	1%	11%	24%	11%	24%
Full-time Student	16%	51%	2%	19%	3%	10%	80%	2%	4%	7%	7%
ARTIST STATUS (SELF-IDENTIFIED)											
Visual artist of any sort	17%	28%	17%	27%	23%	18%	15%	11%	9%	12%	9%
Performing artist of any sort	23%	39%	15%	35%	24%	34%	37%	8%	14%	19%	20%
TOP 12 OCCUPATIONS											
Education, admin. or research	10%	10%	13%	10%	12%	10%	5%	9%	14%	8%	8%
Student	10%	31%	1%	11%	1%	7%	57%	2%	2%	4%	4%
Engineering or technology	9%	10%	13%	6%	4%	10%	11%	10%	7%	11%	18%
Teaching, college or grad studies	9%	13%	11%	9%	11%	11%	4%	3%	14%	4%	12%
Health Care	9%	3%	10%	7%	10%	10%	6%	12%	10%	12%	11%
Other Occupation (not listed)	9%	5%	9%	11%	9%	13%	3%	11%	9%	8%	10%
Business, admin. or consulting	9%	4%	9%	6%	9%	6%	4%	16%	10%	11%	9%
Teaching, primary or secondary	6%	2%	5%	7%	10%	6%	3%	4%	9%	9%	7%
Sales or marketing	4%	2%	3%	3%	4%	3%	1%	7%	3%	5%	3%
Human services	4%	2%	3%	6%	8%	3%	1%	2%	3%	4%	3%
Law	3%	3%	6%	4%	3%	3%	1%	3%	5%	3%	3%
Artist or arts administration	3%	6%	4%	8%	5%	4%	1%	2%	1%	2%	0%

*The highest observations within each cohort are bolded.

University / Presenter Relationship

UNIVERSITY AND PRESENTER RELATIONSHIPS BY SEGMENT	Total Sample	Mavericks	Experientials	Remixers	Diversity Seekers	Classical Devotees	Networked Students	Blockbusters	Civically-Engaged	Faith and Family	Serenity Seekers
STRENGTH OF ALLEGIANCE OR BOND WITH UNIVERSITY											
% "Strong" (score = 7)	21%	27%	19%	23%	20%	19%	33%	17%	20%	17%	19%
% "Weak" (score = 1)	12%	8%	15%	12%	13%	16%	2%	16%	10%	12%	14%
STRENGTH OF ALLEGIANCE OR BOND WITH PRESENTING PROGRAM/VENUE											
% "Strong" (score = 7)	10%	11%	12%	15%	15%	13%	6%	7%	10%	6%	5%
% "Weak" (score = 1)	7%	7%	7%	6%	6%	10%	4%	10%	4%	9%	9%
RELATIONSHIP WITH UNIVERSITY (MULTIPLE RESPONSES ALLOWED)											
Student	18%	61%	2%	21%	3%	10%	92%	2%	4%	8%	7%
Faculty (current or retired)	10%	6%	14%	9%	11%	10%	2%	7%	17%	6%	13%
Staff	17%	13%	18%	16%	20%	16%	7%	21%	18%	18%	16%
Alumni	27%	16%	32%	27%	28%	28%	10%	29%	32%	30%	29%
Parent or grandparent of student	10%	3%	9%	6%	12%	7%	0%	14%	16%	16%	14%
CLASS LEVEL, IF STUDENT											
First-Year Student	0%	0%	*	0%	*	*	0%	*	*	*	*
Sophomore	9%	8%	*	7%	*	*	11%	*	*	*	*
Junior	15%	15%	*	14%	*	*	17%	*	*	*	*
Senior	19%	17%	*	21%	*	*	21%	*	*	*	*
Masters program (any)	15%	14%	*	22%	*	*	12%	*	*	*	*
Doctoral program	37%	42%	*	29%	*	*	31%	*	*	*	*
Medical or Law degree program	6%	3%	*	7%	*	*	7%	*	*	*	*
TOP TEN AREAS OF STUDY, RESEARCH OR TEACHING, IF FACULTY OR STUDENT											
Science and Technology	13%	13%	14%	7%	8%	15%	13%	16%	15%	11%	21%
Health Care or Public Health	12%	2%	24%	8%	17%	8%	10%	27%	21%	27%	11%
Literature, Languages, History or	11%	17%	19%	15%	17%	15%	6%	3%	9%	7%	5%
Psychology, Social Work or Social	11%	12%	6%	21%	14%	6%	10%	9%	10%	2%	10%
Engineering	10%	11%	3%	4%	6%	5%	17%	8%	3%	9%	18%
Business or Management	7%	3%	7%	4%	6%	6%	10%	11%	4%	10%	5%
Education	6%	3%	3%	7%	9%	6%	7%	3%	8%	13%	4%
Music	4%	9%	3%	3%	2%	10%	5%	0%	2%	2%	1%
Math or Physics	4%	4%	4%	1%	2%	8%	3%	1%	7%	1%	8%
Visual Art, Design or Architecture	3%	4%	5%	8%	3%	5%	2%	1%	1%	0%	2%

*The highest observations within each cohort are bolded.

Consumer Behaviors Related to Arts Attendance

CONSUMPTION BEHAVIORS BY SEGMENT	Total Sample	Mavericks	Experientials	Remixers	Diversity Seekers	Classical Devotees	Networked Students	Blockbusters	Civically-Engaged	Faith and Family	Serenity Seekers
COUNT OF TYPES OF SHOWS PURCHASED (FROM ACTUAL PURCHASE DATA)											
One show type only	43%	42%	38%	43%	43%	44%	42%	40%	41%	50%	48%
Two or three types bought	37%	36%	35%	36%	34%	38%	41%	42%	33%	39%	32%
Four or more types bought	20%	21%	27%	20%	23%	17%	17%	17%	26%	11%	20%
AVG. RATING FOR INCLINATION TO SUBSCRIBE (1=DISINCLINED, 7=INCLINED)											
Inclination to subscribe	3.4	2.6	4.5	3.1	3.4	3.1	2.8	3.5	3.8	3.1	3.2
AVG. LEVEL OF AGREEMENT THAT GOING OUT TO LIVE PERFORMANCES IS "A SOCIAL OCCASION FOR ME, AND NOT SOMETHING THAT I WOULD DO ALONE"											
Social context is prerequisite	3.9	2.3	3.8	3.4	3.1	2.4	4.5	5.4	4.3	4.8	4.1
TYPICAL SOCIAL CONTEXT FOR ATTENDING (MULTIPLE RESPONSES ALLOWED)											
My spouse or partner	70%	49%	80%	62%	71%	59%	45%	80%	81%	75%	84%
My children	28%	6%	20%	27%	43%	17%	2%	50%	32%	48%	20%
My parents or grandparents	13%	16%	5%	18%	13%	11%	22%	14%	10%	18%	5%
Friends	59%	75%	45%	74%	74%	56%	84%	47%	50%	58%	25%
Alone	24%	65%	10%	32%	28%	56%	24%	6%	11%	11%	13%
FLEXIBILITY/SHORT PLANNING HORIZON (AVG. LEVEL OF AGREEMENT)											
Prefer to keep my options open	4.3	4.7	4.1	4.6	4.1	4.4	4.8	4.3	4.0	4.2	4.1
PRICE ELASTIC / USUALLY BUY TOP-PRICED SEATS (AVG. LEVEL OF AGREEMENT)											
Usually buy the best seats	4.0	2.9	5.1	3.5	3.7	4.0	2.9	4.8	4.4	4.0	4.0
BARRIERS / REASONS FOR NOT ATTENDING MORE OFTEN (% CITING "OFTEN")											
Cost concerns	20%	27%	11%	22%	23%	23%	23%	15%	15%	25%	17%
Time constraints or sched. conflict	31%	33%	32%	29%	31%	27%	33%	24%	33%	33%	32%
No one to go with	5%	4%	5%	5%	4%	5%	6%	5%	5%	5%	4%
INITIATORS / PERCENT WHO 'AGREE A LOT' THAT THEY LIKE TO ORGANIZE OUTINGS											
Initiators	15%	13%	15%	25%	20%	9%	21%	13%	14%	14%	4%
SOURCES OF INFORMATION / AVG. RATING FOR USEFULNESS											
Brochures in the mail (received months in advance)	5.6	5.2	5.7	5.5	5.9	5.7	5.0	5.5	5.9	5.8	5.6
Postcards in the mail (closer to the performance date)	4.8	4.8	4.6	5.3	5.1	4.8	4.7	4.8	4.7	5.0	4.3
Radio (any station)	3.5	3.3	3.4	3.9	3.9	3.3	3.1	3.5	3.5	3.7	3.3
Campus/university newspaper	2.5	3.2	2.2	3.0	2.3	2.2	4.0	2.2	2.2	2.3	2.0
Local/regional newspaper	4.0	3.3	3.9	4.1	4.5	3.8	3.0	4.2	4.5	4.0	4.0
Email from cultural orgs.	4.5	4.7	4.6	5.1	4.8	4.5	4.5	4.1	4.4	4.3	4.0
Cultural organization web sites	3.7	4.2	3.9	4.3	3.9	3.9	3.6	3.3	3.6	3.4	3.1
Other web sites with calendar listings for cultural events	3.8	4.5	3.8	4.3	3.8	3.7	4.0	3.6	3.4	3.7	3.1

Cultural Attitudes

CULTURAL ATTITUDES	Total Sample	Mavericks	Experimentals	Remixers	Diversity Seekers	Classical Devotees	Networked Students	Blockbusters	Civically-Engaged	Faith and Family	Serenity Seekers
PERCENT WHO TAKE AN INTEREST IN THE ART OF ONE OR MORE SPECIFIC CULTURES											
% Interested in Other Cultures	57%	72%	53%	82%	81%	64%	64%	25%	43%	45%	48%
PERCENT INTERESTED IN SPECIFIC CULTURES											
Hip Hop/contemp. urban culture	18%	21%	6%	93%	2%	4%	31%	15%	2%	9%	2%
African-American culture	19%	13%	10%	82%	32%	3%	7%	6%	8%	12%	8%
African cultures	24%	27%	20%	73%	41%	11%	17%	9%	13%	16%	9%
Latin cultures	36%	31%	29%	87%	59%	26%	41%	20%	20%	27%	17%
Asian cultures	34%	43%	34%	63%	48%	34%	37%	19%	19%	22%	18%
Arab or Middle Eastern cultures	22%	34%	18%	56%	34%	18%	21%	6%	13%	10%	10%
Native American cultures	28%	25%	25%	60%	46%	19%	16%	19%	20%	23%	15%
Indigenous or aboriginal cultures	24%	34%	22%	58%	42%	17%	19%	10%	14%	12%	9%
Gay or lesbian culture	11%	21%	14%	33%	13%	8%	7%	3%	5%	1%	2%
FAITH FILTER / AVG. RATING FOR "MY RELIGIOUS BACKGROUND OR FAITH INFLUENCES THE TYPES OF ARTS PROGRAMS THAT I CHOOSE TO ATTEND"											
Avg. Rating (1=Not at All, 7=A Great Deal)	2.1	1.5	1.5	1.9	1.8	1.8	2.3	1.7	1.7	5.2	2.1
MULTI-SENSORY / PREFERENCE FOR SINGLE-SENSORY VS. MULTI-SENSORY EXPERIENCES											
Prefer single-sensory	24%	19%	18%	10%	18%	39%	18%	5%	42%	15%	61%
Prefer multi-sensory	76%	81%	82%	90%	82%	61%	82%	95%	58%	85%	39%
RISK TOLERANCE/ PREFERENCE FOR RISKY OR UNCERTAIN OUTCOME VS. SURE CHOICE											
The sure choice	63%	18%	20%	40%	55%	66%	74%	80%	90%	92%	93%
The riskier alternative	37%	82%	80%	60%	45%	34%	26%	20%	10%	8%	7%
APPETITE FOR NEW WORK BY LIVING ARTISTS (PERCENT "BIG APPETITE")											
Classical music - new pieces by living composers	16%	30%	21%	23%	18%	22%	20%	6%	9%	14%	6%
Dance - new dances by living choreographers	33%	45%	43%	63%	45%	26%	37%	25%	17%	16%	8%
Theater - new plays by living playwrights	38%	55%	52%	56%	48%	31%	34%	35%	30%	21%	13%
AVG. PREFERENCE RATINGS FOR FOR EDUCATIONAL ACTIVITIES (1=DISLIKE, 7=LIKE)											
Pre-performance talks given by visiting artists or speakers	4.1	4.5	4.4	4.6	4.3	5.0	3.5	3.0	4.2	3.7	3.7
Post-performance discussions with performers	4.1	4.7	4.6	5.0	4.3	4.9	3.8	3.1	3.9	3.7	3.3
Reading printed program notes	5.9	5.9	6.0	5.9	6.1	6.1	5.7	5.3	6.1	5.6	5.8
Hearing musicians introduce their pieces from the stage	5.5	5.4	5.7	5.7	5.8	5.5	5.2	5.2	5.7	5.4	5.3

Cultural Attitudes – Continued

LEVEL OF AGREEMENT WITH STATEMENTS ABOUT CULTURAL CONTENT	Total Sample	Mavericks	Experientials	Remixers	Diversity Seekers	Classical Devotees	Networked Students	Blockbusters	Civically-Engaged	Faith and Family	Serenity Seekers
AVG. RATING FOR AGREEMENT (1=DISAGREE, 7=AGREE)											
[remixers] I love that art these days can be digitized and remixed, sampled and quickly adapted.											
Avg. rating	3.8	4.7	4.2	4.6	3.4	3.2	4.1	4.1	3.2	3.7	3.0
[authenticity-seekers] I attach a high value to the authenticity and historical accuracy of art.											
Avg. rating	4.8	4.4	4.5	4.9	5.1	5.1	4.7	4.3	4.8	5.1	5.3
[serenity-seekers] I tend to avoid performances that are sad, depressing or disturbing.											
Avg. rating	3.1	1.8	2.3	2.5	2.5	2.8	3.0	4.0	3.3	4.3	4.4
[strong cultural roots] I take a strong interest in the artistic legacy and cultural heritage of my ancestors.											
Avg. rating	4.3	3.9	3.6	5.0	4.9	4.4	4.4	3.6	4.0	4.6	4.3
[diversity-seekers] I strive to experience and appreciate a broad range of world cultures.											
Avg. rating	5.2	5.9	5.8	6.3	6.1	4.8	5.2	4.6	4.7	4.5	4.1
[experience-seekers] I'll go see just about any performance, even if I'm not sure I'll enjoy it.											
Avg. rating	3.5	4.5	4.6	4.3	3.7	3.1	3.9	3.2	2.8	2.5	2.2
[averse to political content] I tend to avoid performances with a strong political message.											
Avg. rating	3.2	2.1	2.2	2.2	2.4	4.0	3.5	4.2	2.5	4.8	5.1
[decency standard] I tend to be offended by vulgar language or sexually suggestive content.											
Avg. rating	2.9	1.5	1.9	2.0	2.6	3.0	2.5	3.1	2.9	5.4	4.1

Preferences for Types and Styles of Performing Arts Programs

PREFERENCES AND TASTES FOR TYPES OF ARTS ACTIVITIES	Total Sample	Mavericks	Experientials	Remixers	Diversity Seekers	Classical Devotees	Networked Students	Blockbusters	Civically-Engaged	Faith and Family	Serenity Seekers
PERCENT REPORTING A "VITAL INTEREST" IN PARTICIPATORY ARTS ACTIVITIES											
Acting (performing for others)	16%	21%	14%	25%	17%	16%	17%	16%	12%	17%	7%
Book clubs, literature or poetry groups	32%	36%	34%	40%	43%	30%	23%	24%	38%	27%	19%
Going out dancing socially	25%	32%	16%	51%	26%	15%	47%	22%	13%	18%	12%
Movement for exercise/health	67%	66%	67%	81%	76%	60%	67%	67%	67%	65%	51%
Playing an instrument	30%	38%	26%	29%	32%	42%	42%	20%	22%	29%	34%
Singing	30%	29%	17%	37%	37%	34%	35%	22%	26%	46%	25%
Downloading music from the Internet	27%	45%	24%	41%	18%	22%	48%	24%	17%	23%	14%
Visual arts (any medium)	49%	55%	54%	65%	59%	53%	37%	44%	43%	41%	34%
Craft-making (any type)	35%	33%	28%	41%	42%	29%	35%	40%	29%	44%	28%
AVG. RATING FOR INTEREST IN ATTENDING MUSIC PERFORMANCES (1=NO INTEREST, 7=HIGH INTEREST)											
Classical music concerts (symphony)	5.1	5.0	5.0	4.6	5.4	5.9	5.1	3.9	5.6	5.0	5.6
Chamber music concerts (intimate)	4.5	4.7	4.6	4.2	5.0	5.4	4.4	3.3	4.9	4.4	5.0
Opera (fully staged productions)	4.2	4.6	4.3	4.3	4.6	5.0	4.4	3.1	4.3	3.8	4.1
Jazz concerts - New Orleans jazz	4.3	4.3	4.2	4.8	4.6	3.8	4.4	4.2	4.2	4.1	4.0
Jazz concerts - Swing or big band	4.4	4.2	4.2	4.7	4.6	3.9	4.6	4.5	4.3	4.4	4.1
Jazz concerts - Bebop	3.7	4.2	4.0	4.8	4.0	3.1	3.9	3.7	3.1	3.4	2.9
Jazz concerts - Latin jazz (Afro-Cuban)	4.3	4.7	4.5	5.7	5.1	3.7	4.5	4.0	3.8	3.7	3.2
Jazz concerts - Jazz fusion or avant-garde	3.7	4.5	4.2	5.0	4.0	3.1	4.0	3.6	2.9	3.1	2.6
World music concerts (i.e., concertos)	4.9	5.4	5.1	6.0	5.9	4.4	4.9	4.2	4.5	4.3	3.9
Bluegrass or Appalachian folk music	4.1	4.2	4.1	4.4	4.8	3.6	3.9	3.7	4.3	4.1	3.8
Gospel music concerts	3.3	3.2	2.8	4.2	3.9	2.8	3.2	2.7	3.0	4.4	2.7
Hip Hop or Rap concerts	2.3	2.9	2.0	4.4	1.9	1.5	3.1	2.2	1.5	1.9	1.3
AVG. RATING FOR INTEREST IN MUSIC FROM DIFFERENT PERIODS											
Medieval, Renaissance and Baroque	4.6	4.7	4.7	4.4	5.1	5.3	4.5	3.3	5.0	4.4	5.0
Classical and Romantic periods	5.3	5.1	5.1	4.9	5.6	6.0	5.3	4.1	5.7	5.2	5.8
20th century music	4.8	5.2	5.0	4.9	5.1	5.2	4.7	4.1	4.7	4.7	4.4
AVG. RATING FOR INTEREST IN ATTENDING DANCE PERFORMANCES											
Ballet	4.7	4.7	4.7	5.0	5.2	5.0	5.0	4.2	4.5	4.4	3.9
Modern/contemporary dance	4.8	5.3	5.3	5.7	5.5	4.7	4.8	4.6	4.2	4.1	3.1
Ethnic or folk dance of diverse cultures	4.6	4.9	4.6	5.5	5.5	4.2	4.6	4.1	4.2	4.3	3.4
Jazz or tap dance	4.3	4.2	4.3	5.3	4.9	3.7	4.6	4.6	3.7	4.2	3.1
Acrobatic or circus	4.3	4.5	4.2	5.0	4.7	3.7	4.8	4.8	3.8	4.3	3.2
AVG. RATING FOR INTEREST IN ATTENDING THEATRE PERFORMANCES											
Stage plays - contemporary drama	5.5	5.9	6.0	5.8	5.9	5.4	5.2	5.3	5.6	5.0	4.4
Stage plays - Shakespeare	5.0	5.4	5.3	5.2	5.4	5.3	5.2	4.2	5.3	4.6	4.5
Broadway musicals	5.5	4.7	5.0	5.3	5.4	5.1	6.0	6.1	5.6	6.0	5.0
Perfs by comedians or comedy troupes	4.9	4.7	4.7	5.2	4.8	4.4	5.2	5.5	4.9	4.8	4.0
Multi-media theatrical programs or events	4.7	5.4	5.2	5.6	5.0	4.2	4.7	4.9	4.3	4.5	3.1
Lectures on current topics by distinguished speakers	4.5	5.1	4.8	5.1	5.1	4.5	4.0	3.5	4.9	3.8	3.6
Spoken word events featuring literary readings	3.7	4.6	4.2	4.9	4.3	3.7	3.2	2.6	3.7	3.0	2.4

Value Statements

AVG. IMPORTANCE RATINGS FOR VALUE STATEMENTS	Total Sample	Mavericks	Experientials	Remixers	Diversity Seekers	Classical Devotees	Networked Students	Blockbusters	Civically-Engaged	Faith and Family	Serenity Seekers
INNER-DIRECTED VALUES											
[strong relationship with the natural world] Supporting environmental causes and conservation efforts.											
Avg. importance rating	5.3	5.7	5.7	5.9	6.3	4.9	4.7	4.6	5.9	4.3	4.5
[health and physical activity] Doing activities that keep you physically active and contribute to your health											
Avg. importance rating	5.8	5.6	5.8	6.1	6.2	5.5	5.6	5.5	5.8	5.7	5.4
[development of the creative self] Developing your creativity.											
Avg. importance rating	5.5	6.3	5.5	6.2	6.2	5.8	5.5	4.9	4.7	5.1	4.6
[adventurousness] Always exploring, discovering, and hoping to be surprised.											
Avg. importance rating	5.6	6.5	5.9	6.3	6.2	5.6	5.8	5.1	4.9	4.8	4.4
[sense-making] Keeping up with world events and why things happen.											
Avg. importance rating	5.8	6.1	6.0	6.2	6.2	5.5	5.3	5.1	6.2	5.3	5.4
[life of the mind] Sharpening your mind; intellectual pursuits.											
Avg. importance rating	6.2	6.7	6.3	6.5	6.6	6.4	6.1	5.4	6.2	5.7	5.9
[thought leader] Being on the cutting edge of new art and ideas											
Avg. importance rating	4.3	5.6	5.1	5.5	4.7	4.4	4.2	3.7	3.5	3.3	2.6
[emotionally reflective] Reflecting upon, and processing, your emotions.											
Avg. importance rating	5.3	6.0	5.2	6.1	6.2	5.7	5.4	4.6	4.8	5.0	3.8
[emotionally experiential] Feeling the extremities of emotion through art.											
Avg. importance rating	4.8	6.0	5.2	5.8	5.7	5.6	4.5	4.0	4.1	4.1	3.0
[spiritual] Having a spiritual life											
Avg. importance rating	4.7	4.1	3.7	5.4	5.6	4.7	4.3	4.3	4.0	6.5	4.1
[reject social norms] I instinctively challenge authority and make my own rules.											
Avg. importance rating	3.9	5.1	4.7	4.6	4.4	4.0	3.5	3.2	3.7	2.5	3.0
[achievement] I am driven to surpass my own limits in pursuit of excellence.											
Avg. importance rating	5.7	6.0	5.6	6.1	5.9	5.5	6.2	5.3	5.4	5.4	5.2
OUTER-DIRECTED VALUES											
[family cohesion] Strengthening family relationships											
Avg. importance rating	5.8	5.2	5.0	6.1	6.5	5.3	5.9	6.0	6.1	6.4	5.3
[socially gregarious] Making new friends and expanding your social network.											
Avg. importance rating	5.0	5.2	4.8	5.6	5.4	4.4	5.6	5.0	5.0	4.9	3.8
[civic engagement] Being involved in civic affairs and working on behalf of your community.											
Avg. importance rating	4.8	4.9	4.7	5.5	5.6	3.5	4.6	4.4	5.4	4.9	3.5
[inclined toward political expression] Voicing your political views.											
Avg. importance rating	4.3	4.9	4.8	5.0	5.0	3.3	3.6	3.3	5.3	3.7	3.3
[social justice] Social justice and equal opportunity.											
Avg. importance rating	5.7	6.1	5.9	6.4	6.4	5.1	5.5	5.0	6.2	5.1	4.5
[sense of philanthropic obligation] Re-paying society for the opportunities and good fortune you've had.											
Avg. importance rating	5.2	5.2	5.0	5.6	6.0	4.3	5.2	4.7	5.7	5.1	4.2
[sense of duty to mankind] Working to alleviate other people's suffering.											
Avg. importance rating	5.3	5.5	5.2	6.0	6.1	4.6	5.3	4.8	5.6	5.4	4.2
[self-empowered] Gaining control over your destiny.											
Avg. importance rating	5.2	5.3	5.2	5.5	5.5	5.1	5.2	5.2	5.3	4.8	4.8
[fantasy-seeker] Escaping to a make-believe world											
Avg. importance rating	3.6	4.6	3.5	4.2	3.5	3.6	4.1	3.5	3.0	3.1	2.8
[embrace technology] Adopting new technologies as quickly as possible											
Avg. importance rating	4.2	4.5	4.5	4.6	3.9	3.6	4.5	4.5	4.0	4.1	3.9

Gardner's Multiple Intelligences

AVG. RATINGS FOR INTELLIGENCES (SELF-DIAGNOSED)	Total Sample	Mavericks	Experientials	Remixers	Diversity Seekers	Classical Devotees	Networked Students	Blockbusters	Civically-Engaged	Faith and Family	Serenity Seekers
GARDINER'S MULTIPLE INTELLIGENCES											
Linguistic Intelligence: I'm a language-oriented person and excel naturally at writing and speaking clearly and persuasively.											
Avg. importance rating	5.2	5.6	5.3	5.6	5.6	5.3	4.8	4.5	5.3	4.8	4.7
Logical-Mathematical Intelligence: I excel at logical analysis and mathematical computation.											
Avg. importance rating	4.4	4.8	4.6	4.2	4.0	4.2	5.0	4.3	4.4	4.3	4.8
Bodily-Kinesthetic Intelligence: I'm a kinetically-oriented person with excellent coordination and a keen sense of movement.											
Avg. importance rating	4.2	4.3	4.1	4.9	4.5	3.9	4.3	4.1	3.8	4.1	3.6
Musical Intelligence: I'm a musically-oriented person with a good ear for harmony and melody.											
Avg. importance rating	4.9	5.2	4.7	5.2	5.2	5.3	4.8	4.3	4.7	4.8	4.8
Visual/Spatial Intelligence: I'm a visually-oriented person, attuned to color, texture and form, and love to manipulate images in my mind.											
Avg. importance rating	4.9	5.3	5.1	5.5	5.4	4.9	4.8	4.7	4.4	4.6	4.0
Naturalist Intelligence: I'm a naturalist, with a strong sense about plants, animals and the elements of nature.											
Avg. importance rating	4.5	4.7	4.6	4.8	5.2	4.3	4.0	4.1	4.6	4.0	4.2
Interpersonal Intelligence: I'm naturally good at interpersonal relations; I understand what motivates people and am very good at working out people problems.											
Avg. importance rating	5.2	5.2	5.0	5.8	5.7	4.8	5.2	5.0	5.1	5.1	4.2
Intrapersonal Intelligence: I'm particularly in tune with my own feelings, goals, fears and strengths.											
Avg. importance rating	5.5	5.6	5.3	5.9	5.9	5.5	5.3	5.3	5.3	5.5	4.9
Existential Intelligence: I'm inclined to ponder the larger questions about life, destiny and the supernatural.											
Avg. importance rating	4.9	5.5	4.9	5.4	5.5	5.1	4.8	4.2	4.5	5.0	4.0

Civic Involvement

INVOLVEMENT IN CIVIC ACTIVITIES, POLITICAL VIEWS	Total Sample	Mavericks	Experientials	Remixers	Diversity Seekers	Classical Devotees	Networked Students	Blockbusters	Civically-Engaged	Faith and Family	Serenity Seekers
PERCENT INDICATING INVOLVEMENT											
Health club, athletic league	44%	38%	47%	51%	49%	38%	40%	48%	48%	40%	36%
Neighborhood association	19%	8%	22%	19%	22%	13%	4%	23%	28%	21%	19%
School or youth-oriented group	16%	18%	7%	22%	16%	5%	26%	19%	13%	25%	8%
Faith-based organization	30%	9%	15%	24%	31%	22%	22%	28%	31%	82%	32%
Library group or book club	17%	12%	21%	17%	26%	18%	7%	15%	25%	13%	10%
Cultural org. volunteer group	19%	22%	21%	26%	27%	19%	15%	12%	20%	13%	12%
Community gardening, park, or n	7%	6%	9%	9%	12%	7%	2%	5%	10%	3%	6%
Community service or civic group	24%	20%	19%	32%	31%	11%	23%	20%	33%	25%	16%
Political organization or campaign	15%	15%	20%	21%	22%	6%	6%	4%	27%	9%	5%
POLITICAL VIEWS (1=LIBERAL, 7=CONSERVATIVE)											
Avg. score	2.8	1.8	2.0	2.1	2.1	2.9	3.1	3.6	2.0	5.2	3.9

APPENDIX 1 – ONLINE SURVEY PROTOCOL

Email Invitation Template

Subject Line: Special Request from [Program Director] of [Program]

Dear UMS [Patron] [Contributor],

I am writing to request something that is very valuable to you - your time. Would you be willing to give [Program] 15 minutes to take an online survey?

The survey is part of a groundbreaking study of performing arts attendance that [Program] has commissioned in partnership with 13 other major universities. It is designed to explore your values and beliefs about culture, what types of live performances you enjoy, and related subjects.

This is an anonymous survey and does not involve sales or fundraising of any sort. You were selected to receive this email because of your past [attendance at [Program] events.] [support of [Program]].

As a token of our appreciation, a special ticket offer appears on the last page of the survey.

Your assistance will be greatly appreciated.

Cordially,

[Program Director]
[Program]

[Zoomerang will automatically insert the URL/hyperlink here]

Online Survey Welcome Page

[Program Artwork/Banner]

Thanks for agreeing to participate in the [Program][Donor/Audience] Survey. Your responses are confidential. Respondents should be at least 18 years old.

The survey is part of a national study to better understand why people attend and support performing arts programs, and was commissioned by 14 leading university performing arts presenters:

Lead Partners

ASU Gammage, Tempe, Arizona
Mondavi Center for the Performing Arts, University of California – Davis
University of Florida Performing Arts, Gainesville
Clarice Smith Performing Arts Center, University of Maryland
University Musical Society, Ann Arbor, Michigan

Lied Center for Performing Arts, University of Nebraska – Lincoln

Associate Partners

Cal Performances, University of California – Berkeley
Hopkins Center for the Arts, Dartmouth College
Kranert Center for the Performing Arts, University of Illinois
Hancher Auditorium, University of Iowa
Lied Center of Kansas, University of Kansas – Lawrence
Annenberg Center for the Performing Arts, University of Pennsylvania
Center for the Performing Arts, The Pennsylvania State University
Stanford Lively Arts, Stanford University

The survey takes about 15 minutes to complete. It is not possible to re-start, once you've begun.

Let's get started...

Screening Question to Filter Out Ineligible Respondents

Over the past two years, have you or your spouse/partner purchased at least one ticket to a live performance presented by [UMS]? [ticket buyers only]

Yes - Please click Submit to continue

No – Thanks for your interest, but you are not eligible to take this survey. **Please cancel out of the survey by closing your browser window.**

Over the past four years, did you make a financial contribution to support [Program], above and beyond the cost of tickets?

Yes - Please click Submit to continue

No – Thanks for your interest, but you are not eligible to take this survey. **Please cancel out of the survey by closing your browser window.**

If you have difficulty advancing past this question, you may need to set your web browser to enable cookies. [\[Click Here\]](#) for more information.

Online Survey – Section 1 [introductory questions]

To begin, please tell us a little about your background and connections to the [University Name].

Over the past two years, have you or your spouse/partner purchased at least one ticket to a live performance presented by [Program]?

Yes – Please continue

No – You are not eligible to take this survey. Please cancel out of the survey by closing your browser window.

Are you a visual artist of any sort?

Yes/No

Are you a performing artist of any sort?

Yes/No

How strong of an allegiance or bond do you have with the [University]?

Scale (1-7)

1 = Weak

7 = Strong

How strong of an allegiance or bond do you have with the [Program]?

Scale (1-7)

1 = Weak

7 = Strong

What is your affiliation with [the University], if any? (select all that apply)

None

Student

Faculty (current or retired)

Staff (current or retired)

Alumni

Parent or grandparent of student or alum

If you are a student or faculty member, please answer the next few questions. If not, scroll down and click “submit” to continue.

If you are a student, what is your present class or level of study? (select one from the drop-down list)

First-Year Student

Sophomore

Junior

Senior

Masters program (any)

Doctoral program (any)

Medical or Law degree program

If you are a faculty member or student, which of the following best describes your area of study, teaching or research? (select one from the drop-down list)

Agriculture, Farming or Veterinary Medicine

Business or Management

Dance

Education

Engineering

Journalism and Communications

Law

Literature, Languages, History or Cultural Studies

Math or Physics
Health Care or Public Health
Music
Natural Resources & Environment
Public Policy
Psychology, Social Work or Social Science
Science and Technology
Theatre
Visual Art, Design or Architecture
Other/Undecided

You have completed Part X of X. Click Submit to continue.

Online Survey – Section 2A [Cultural Attitudes]

Now, please tell us about your cultural interests.

Do you take a special interest in the art and culture of one or more specific countries or parts of the world, other than the United States?

Yes/No

If Yes, which countries or parts of the world? (list up to three) [three one-line comments boxes]
[this data will need to be cleaned and post-coded]

Do you take a special interest in one or more specific cultures that are not limited by geography? (select all that apply)

Hip Hop/contemporary urban culture
African-American culture
African cultures
Latin cultures
Asian cultures
Arab or Middle Eastern cultures
Native American cultures
Indigenous or aboriginal cultures around the world
Gay or lesbian culture

In what other cultures do you take a special interest? [comments box] [this is the only open-ended question in the entire survey]

To what extent does your religious background or faith influence the types of arts programs that you choose to attend?

Scale

1=Not At All
7=A Great Deal

Online Survey – Section 2B [Attitudes about Culture and Cultural Experiences]

Now, tell us how you like to experience the performing arts.



Some people prefer arts programs that engage all of their senses simultaneously (i.e., dialogue, movement, visuals, music), while others prefer programs that engage one of their senses at a time. Which best describes you? (select one)

Single-sensory
Multi-sensory

Suppose you are planning an outing to a live performance. There are two choices. One is sure to be enjoyable and straightforward in terms of subject matter, and the other is a riskier proposition in that the meaning of the work might be unclear, and you may love it or hate it, depending on how it goes.

All else being equal, which one would you choose?

The sure choice
The riskier alternative

Some people like to be at the forefront of the art forms as they evolve. What is your appetite for new work by living artists in each of the following disciplines?

Little or no appetite
Some appetite
Big appetite

Classical music – new compositions by living composers
Dance – new dances by living choreographers
Theater – new plays by living playwrights

How much do you like participating in each of the following types of educational activities in connection with **[Program] performances?**

Scale:
1=DISLIKE
7=LIKE

Attending pre-performance talks given by visiting artists or speakers
Attending post-performance discussions with performers
Reading printed program notes

Generally, how much do you like hearing musicians introduce their pieces from the stage during concerts?

Scale:
1=DISLIKE
7=LIKE

How much do you agree with each of the following statements? If you cannot answer an item, just skip it.

Scale (1-7) [Randomize Items]
1 = DISAGREE



7 = AGREE

I love that art these days can be digitized and remixed, sampled and quickly adapted.
[remixers]

I attach a high value to the authenticity and historical accuracy of art.
[authenticity]

I tend to avoid performances of works that may leave me feeling sad or disturbed.
[serenity; inverse it tolerance for emotionally challenging content]

I take a strong interest in the artistic legacy and cultural heritage of my ancestors.
[strong cultural roots]

I seek out performances that will expose me to a broad range of world cultures.
[cultural diversity]

I'll go see just about any performance, even if I'm not sure I'll enjoy it.
[open to experience]

I tend to avoid performances with a strong political message.
[averse to political content]

I tend to be offended by vulgar language or sexually suggestive content in a theatre or dance performance.
[decency standard]

Online Survey – Section 2C [Music preferences and tastes – ticket buyers only]

Now, please tell us about your specific interests within music, dance and theater.

First, a question about your personal artistic activities. Which of the following activities are vital interests for you? (select all that apply)

Acting (performing for others)
Book clubs, literature or poetry groups
Going out dancing socially
Movement for exercise/health
Playing an instrument
Singing
Downloading music from the Internet
Visual arts (any medium)
Craft-making (any type)

What is your level of interest in attending concerts featuring the following types of music?

Scale (1-7)

1 = No interest

4 = Moderate interest

7 = High interest

Classical music concerts (symphonic or prominent recitalists)

Chamber music concerts (intimate scale)

Opera (fully staged productions)

Jazz concerts – New Orleans jazz or Dixieland

Jazz concerts – Swing or big band music

Jazz concerts – Bebop

Jazz concerts – Latin jazz (Afro-Cuban or Brazilian jazz)



Jazz concerts – Jazz fusion or avant-garde jazz
World music concerts (i.e., concerts that feature the music of diverse cultures)
Bluegrass or Appalachian folk music concerts
Gospel music concerts
Hip Hop or Rap concerts

What is your level of interest in classical music from each of the following time periods?

Scale (1-7)

1 = No interest
4 = Moderate interest
7 = High interest

Music from the Medieval, Renaissance and Baroque periods
Music from the Classical and Romantic periods
Classical music from the 20th century

Online Survey – Section 2D [Dance and theater preferences and tastes – ticket buyers only]

What is your level of interest in attending the following types of dance performances?

Scale (1-7)

1 = No interest
4 = Moderate interest
7 = High interest

Ballet
Modern/contemporary dance
Ethnic or folk dance of diverse cultures
Jazz or tap dance
Acrobatic or circus

What is your level of interest in attending the following types of theater performances?

Scale (1-7)

1 = No interest
4 = Moderate interest
7 = High interest

Stage plays – contemporary drama
Stage plays – Shakespeare
Broadway musicals
Performances by comedians or comedy troupes
Multi-media theatrical programs or performance art
Lectures on current topics by distinguished speakers
Spoken word events featuring literature, poetry, etc.

You have completed Part X of X. Click Submit to continue.



Online Survey – Section 3A [values, inner-directed]

You're about halfway done with the survey. Your patience is greatly appreciated. The next two questions are about your values and beliefs.

How important to you are each of the following?

Scale (1-7) [Randomize Items]

1 = Not At All Important

7 = Extremely Important

Supporting environmental causes and conservation efforts

[strong relationship with the natural world]

Doing activities that keep you physically active and contribute to your health

[health and physical activity]

Developing your creativity

[development of the creative self]

Always exploring, discovering and looking for new experiences

[adventurous]

Keeping up with world events and why things happen

[sense-making]

Sharpening your mind; intellectual pursuits

[life of the mind]

Being on the bleeding edge of new art and ideas

[progressive thinker]

Reflecting upon, and processing, your emotions

[emotionally reflective]

Feeling the extremities of emotion through art

[emotionally experiential]

Having a spiritual life

[spiritual]

Rejecting authority and making your own rules

[reject social norms]

Adopting new technologies as quickly as possible

[embrace technology]

Pushing yourself to excel and achieve

[achievement]

Online Survey – Section 3B [values, outer-directed]

How important to you are each of the following?

Scale (1-7) [Randomize Items]

1 = Not At All Important

7 = Extremely Important

Strengthening family relationships

[family cohesion]

Making new friends and expanding your social network

[socially gregarious]

Being involved in civic affairs and working on behalf of your community



[civic engagement]
Voicing your political views
[political expression]
Social justice and equal opportunity
[social justice]
Re-paying society for the opportunities and good fortune that you've had
[philanthropic obligation]
Working to alleviate other people's suffering
[humanity]
Gaining control over your destiny
[need for empowerment; inverse is fatalism?]
Escaping to a make-believe world
[fantasy]

[Gardner's Intelligences, Ticket Buyers Only] **How well does each of the following statements describe you?**

Scale (1-7) [Randomize]

1=Not At All

7=Extremely Well

I'm a language-oriented person and excel naturally at writing and speaking clearly and persuasively.

[Linguistic Intelligence]

I excel at logical analysis and mathematical computation.

[Logical-mathematic Intelligence]

I'm a kinetically-oriented person with excellent coordination and a keen sense of movement.

[Bodily-Kinesthetic Intelligence]

I'm a musically-oriented person with a good ear for harmony and melody.

[Musical Intelligence]

I'm a visually-oriented person, attuned to color, texture and form, and love to manipulate images in my mind.

[Visual-Spatial Intelligence]

I'm a naturalist, with a strong sense about plants, animals and the elements of nature.

[Naturalistic Intelligence]

I'm naturally good at interpersonal relations; I understand what motivates people and am very good at working out "people problems."

[Interpersonal Intelligence]

I'm particularly in tune with my own feelings, goals, fears and strengths.

[Intrapersonal Intelligence]

I'm inclined to ponder the larger questions about life, destiny and the supernatural.

[Existential Intelligence]

You have completed Part X of X. Click Submit to continue.

Online Survey – Section 4 [donor motivations – donors only]

[This section will test a range of civic, social, personal, institutional and cultural motivations for donating. The list of motivations was generated from interview data and was refined by the MUPs development directors at the cross-site synthesis meeting on July 11 in Ann Arbor.]

Now, please tell us about the reasons why you support [Program] with financial contributions.

How important are each of the following reasons why you have contributed to [UMS]?

Scale (1-7) [Randomize Items]

1 = Low importance

4 = Moderate importance

7 = High importance

Civic/Democratic motivations

To make possible a high quality of life for our community

To participate in a civic dialogue about current issues

To support outreach efforts towards disadvantaged populations

To promote awareness and appreciation of diverse cultures

To expand the reach of the performing arts to places where it is not accessible

Social motivations

To enjoy the social opportunities provided to donors

To join with the group of people who make this community great

To network for business purposes (me or my spouse/partner)

So that others can see that I am contributing

Personal or ego motivations

Because I have more money than I need

Because I want others to have experiences like the ones I've had with [Program]

Because I want to leave a legacy that includes a vibrant cultural life

To receive the specific benefits associated with my gift level

Institutional motivations

To ensure the long-term viability and sustainability of [Program]

To help ensure that [University] students can see great artists, as part of their education

Cultural/Artistic/Educational motivations:

To allow deeper engagement between artists and audience

To underwrite appearances by high profile artists who otherwise might not appear in our community

To be a part of the evolution of the art forms and the creation of new art

To provide cultural experiences for area school children

Because I am concerned about popular culture and its effect on society

Online Survey – Section 5 [donor attitudes – donors only]

[In addition to assessing donor motivations, other attitudinal questions pertaining to donation will be tested. These were some of the ideas that came out of the Ann Arbor meeting.]

What is your level of familiarity with planned giving options, such as wills/bequests, annuities and trusts?

Scale (1-7)

1=no familiarity

7=high familiarity

To what extent do you consider your donations to [Program] to be a transaction in exchange for specific benefits and privileges associated with your gift level?

Scale (1-7)

1=Not at all

7=Very much

How much value do you attach to each of the following donor benefits? (select one for each)

Scale (1-7)

1 = Low value

7 = High value

Not Applicable

Priority seating

Advance notice of programs

Ability to purchase single tickets in advance of public sale

Parking privileges

Access to more in-depth experiences

Opportunities to meet artists

Opportunities to involve my children or grandchildren in quality programs

Ticket discounts

Personal concierge service for all of my ticketing needs

Which do you prefer? (select one)

I prefer to make only one gift per year.

I prefer making several smaller gifts over the year.

Is [Program] the recipient of the majority of your philanthropic gifts?

Yes/No

What other causes do you support financially? (select all that apply)

Other performing arts organizations

Museums and fine arts groups

Women's causes

Social justice / equality causes

Environmental or conservation causes

Medical research

Political campaigns

Social services (e.g., United Way, Salvation Army)

Children's causes

International aid or disaster relief

Religious causes or faith-based institutions

Higher education

Indicate your level of agreement with each of the following statements. (select one for each)

Scale



Disagree a lot
Disagree a little
Agree a little
Agree a lot

My contributions to [Program] make a difference.
I trust [Program] to use my gift wisely.
I prefer to be able to designate what my gift is used for.
I prefer making a fully tax-deductible gift instead of taking benefits that have a cash value.

Which are the three most important things that you'd like for your contributions to support?
(read all items, then select three)

To support appearances by international artists
To support performances by artists in a particular discipline, like classical music, dance or theater
To support educational activities for area school children
To support artist residencies (i.e., artists who visit for a longer period of time)
To support activities for those with limited access to the arts
To support the creation of new works (i.e. commissioning, etc.)
To support annual operations
To ensure long-term fiscal stability (e.g., endowment)
To underwrite facility improvements

How do you feel about being publicly recognized for your gift to [Program]? (circle a number along the continuum)

1 = Prefer Anonymity
4 = No Preference
7 = Prefer Public Recognition

You have completed Part X of X. Click Submit to continue.

Online Survey – Section 6 [consumer behaviors – ticket buyers only]

Next, a few questions about how you organize your entertainment activities.

With whom do you usually attend live performances? (select all that apply)

My spouse or partner
My children
My parents or grandparents
Friends
Alone

How much do you agree with each of the following statements?

Scale (1-7)
1 = DISAGREE
7 = AGREE

Going to live performances is a social occasion for me, not something I would do alone.



[social context is a pre-requisite]

I prefer to keep my options open, stay flexible and make plans closer to the event.

[spontaneity]

I usually buy the best seats available, without thinking too much about the cost.

[price elastic]

How often do you pass up going to [Program] performances that you'd like to attend, because of cost concerns? (select one)

Never

Sometimes

Often

How often do you pass up going to [Program] performances that you'd like to attend, because of time constraints or schedule conflicts? (select one)

Never

Sometimes

Often

How often do you pass up going to [Program] performances that you'd like to attend because you have difficulty finding someone to go with? (select one)

Never

Sometimes

Often

Generally, how inclined are you to purchase subscription or series tickets to performing arts events?

Scale

1=Disinclined

7=Inclined

Indicate your level of agreement with the following statement.

Scale

Disagree a lot

Disagree a little

Agree a little

Agree a lot

I'm the kind of person who likes to organize outings to cultural events for my friends.

How useful do you find each of the following sources of information about upcoming cultural events? (select one for each item)

Scale (1-7)

1= NOT USEFUL

7 = VERY USEFUL

Brochures in the mail (received months in advance)

Postcards in the mail (closer to the performance date)
Radio (any station)
Campus/university newspaper
Local/regional newspaper
Email from cultural organizations
Cultural organization web sites
Other web sites with calendar listings for cultural events

You have completed Part X of X. Click Submit to continue.

Online Survey – Section 7 [demographic and lifestyle characteristics]

[Please note that we are not asking about ethnicity, household income (except on the donor survey) or educational attainment on purpose.]

To finish, a please answer a few questions about your background. We assure you that this is an anonymous survey. Your answers are strictly confidential.

Your gender?

Female
Male

In what year were you born? [drop-down box]

Are there any children living in your household in any of the following age groups? (select all that apply)

Under 6
6 to 12
13 to 17
18 and over

Do either of your parents, or your spouse's parents, live in the same household as you, or within a short driving distance?

Yes/No

The ZIP Code of your current residence? [one-line comments box]

Which of the following best describes your occupational status? (select one from the drop-down list)

Working full-time
Working part-time
Retired
Full-time family caregiver
Full-time student
Not employed, but looking

What is the occupational status of your spouse or partner, if applicable? (select one from the drop-down list)

Not applicable
Working full-time
Working part-time
Retired
Full-time family caregiver
Full-time student
Not employed, but looking

Which of the following best describes the primary type of work you do, or used to do? (select one from the drop-down list)

Accounting
Artist or Arts Administration
Business/administration/consulting
Clergy or religious
Construction, mining, maintenance
Teaching, college or graduate studies
Teaching, primary or secondary
Education - administration or research
Engineering or technology
Family caregiver
Farming, fishing or forestry
Health care
Human services (e.g., social work, counseling)
Law
Media or communications
Production, transportation, material moving
Public administration or military
Retail
Sales or marketing
Service
Student
Other

Which of the following types of groups or associations do you belong to, if any? (select all that apply)

Health club, athletic league or program
Neighborhood association or a block group
School or youth-oriented group
Faith-based organization or group
Library group or book club
Cultural organization volunteer group
Community gardening, park, or nature group
Community service or civic group
Political organization or campaign

How would you characterize your political views, generally? (select a number)

Scale (1-7)

Liberal

Conservative

[Donors only] Your approximate annual household income?

Less than \$100,000

\$100,000 to \$200,000

More than \$200,000

You have finished the survey. Click Submit to receive your special offer as a token of our appreciation.

Incentive Page

As a token of our thanks, please take advantage of the following special offer for survey respondents only:

[Offer Description]

[Redemption instructions] Please visit the ticket office or call **[phone number]** to take advantage of this offer. (Not available for internet purchases.)

*some restrictions may apply

*not applicable to past ticket purchases

*offer expires December 22, 2006

Click Submit to exit the survey.

Thank You Page

[Change Image File]

APPENDIX 2 – DATA FILE PREPARATION

TO: Lead and Associate Partners
MUP Value and Impact Study

FROM: Alan Brown, Andrea Mitchell

DATE: September 8, 2007

RE: Customer Data Request for Upcoming Online Survey
Target Deadline: Friday, Sept. 22
Hard Deadline: Friday, Sept. 29 (after which we may not be able to include you in the sample)

As we are fast approaching the online “Values Survey” that is Task 2.1 of the MUP study, I am writing to formally request the customer data files that will serve as the basis for our sample of ticket buyers and donors across all 14 campuses.

As discussed in Ann Arbor, we plan to link the survey data with actual purchase and donor data, which will make our segmentation models significantly more efficacious.

To accomplish this, we must create a data base that consolidates ticket buyer and donor data across all of your programs. Given how differently you all store and extract data, and given the varying numbers of email addresses that you all have, this is going to be an interesting challenge.

A Word about Confidentiality

Please note that the email blasts that will be sent out to your patrons with an invitation to take the survey will appear as if they are coming from the director of your program, not from the consultant or any other third party, and will always include an opt-out option. Survey deployment will be managed through Zoomerang.com.

Donor Email List Pull

The ultimate aim of this effort is to achieve a list of donor email addresses with separate fields for gift amount for each of the past four seasons. (The development directors in Ann Arbor indicated this would be a feasible request.)

Fields to Pull:

1. email address
2. Gift amount (cash rec'd), 2002-03 season
3. Gift amount (cash rec'd), 2003-04 season
4. Gift amount (cash rec'd), 2004-05 season
5. Gift amount (cash rec'd), 2005-06 season

Notes:

- Excel format is preferred, although we can accept any delimited field format, dbase or Access file
- Pull ALL records with email addresses, no matter the quantity, and we will randomly select a sample from what you send us
- If you need to pull four separate files corresponding to each season, we are happy to consolidate them on our end
- After the list pull, or as part of the list pull, suppress or delete from the list any donors that you DO NOT want to receive the email invitation to take the survey; however, we ask you not to bias the sample by deleting all high level donors
- We do NOT need or want name fields, in order to assure the anonymity of results; however, you may pull name fields with the rest of the data for the purpose of suppressing unwanted recipients, and then delete the name fields
- Only include donors whose gifts are made for/to the presenting program, not donors to an academic program
- Gift amounts may exist for one, two, three or all four of the years
- Cash rec'd in the fiscal year includes pledge payments on multi-year gifts, but not the full amount of the pledge in the year it was rec'd
- Gifts may be associated with any campaign (annual, capital, endowment, etc.)
- Blank fields are assumed to be zero values (i.e., no gift that year)
- Do not include any ticket purchase information with the donor data

After we consolidate the data across all 14 campuses and create the sample, we will communicate with you about how many of your records are included in the sample. It is possible for us to provide you with the list of those who were and were not selected for the survey, although bear in mind that the list will not include names.

Email the file to Andrea Mitchell in my office at andrea@alansbrown.com, telephone 203-259-7219.

Ticket Buyer Email List Pull

Now for the fun part. The objective behind this list pull is to allow us to tie back survey responses to actual purchase data. This is what will make our segmentation model especially useful. However, it requires a fairly high-maintenance series of list pulls to make this happen, and we appreciate your patience in prepping these files.

Note: If your email database is not connected to your ticketing database, still send us your email list. If you can distinguish between “requests” and “buyers,” send just the buyers. If you can’t distinguish, just send it all.

Our ultimate aim is to achieve a consolidated list of ticket buyer email addresses across the 14 campuses, with a series of fields indicating whether or not they purchased specific types of events for the past two seasons, 2005-06 and 2004-05. For this purpose, we have defined eighteen categories of events (see below).

We ask that you pull ticket buyer email lists for each category in which you are active, and send them to us. We’ll consolidate and standardize the data on our end.

First, you'll need to go through your list of performances from 2005-06 and 2004-05 and classify them according to the categories listed below. Some events may be categorized under more than one category. Then, pull email lists for each category.

For each list pull, send us just one field: email address.

Performance Categories:

1. Ballet
2. Modern dance
3. Other dance (jazz, tap, hip hop, but not ethnic)
4. World music and dance of diverse cultures
5. Symphonic music
6. Chamber music
7. Opera, vocal recitals, and concerts by vocal ensembles in the American or European traditions (e.g., Chanticleer, King's Singers, etc.)
8. Contemporary music
9. Jazz or blues
10. Broadway shows (i.e., musical theater and plays that would be considered "Broadway" product)
11. Stage plays; non-musical
12. Multi-media, multi-discipline or performance art
13. Comedy artists and attractions (e.g., Capitol Steps)
14. Speakers (not including pre-performance lectures)
15. Family/children's programs, regardless of discipline
16. Urban artists; any discipline
17. Programs featuring African American artists or drawing from the African Diaspora
18. Student ensembles, regardless of discipline

We realize that there is significant ambiguity surrounding these categories, and ask you to use your best judgment. Here are a few examples:

- A performance by Grupo Corpo would be classified as both #2 and #4
- Soweto Gospel Choir would be classified as #4 and # 17, but not #7
- Alvin Ailey would be classified as #2 and #17
- Tap Dogs would be classified as #3 and #10 if it was on a Broadway series

Please note that categories #1 through #17 refer only to presentations of visiting professional artists and touring attractions, and not student productions. Category #18 is a catch-all for all performances by student ensembles, regardless of discipline. Faculty performances should be included with professional presentations, as long as you were the presenter.

Don't hesitate to call with any questions.

Notes:

- Excel format is preferred; we can accept any delimited field format, dbase or Access file.
- Pull ALL records with email addresses corresponding to these types of programs, no matter the quantity, and we will randomly select a sample from what you send us.
- After the list pull, or as part of the list pull, suppress or delete from the list any ticket buyers that you DO NOT want to receive the email invitation to take the survey



- We do NOT need or want name fields, in order to assure the anonymity of results; however, you may pull name fields with the rest of the data for the purpose of suppressing unwanted recipients, and then delete the name fields
- If you want to consolidate your list pulls into a single Excel workbook with multiple worksheets, that would be helpful, so that we receive one file from you.

If you are having difficulties of any sort, please call us so we can figure out how to include your buyers and donors in the sample.

After we consolidate the data across all 14 campuses and create the sample, we will communicate with you about how many of your records were included.

The target launch date for the surveys is October 16.

Email the file to Andrea Mitchell in my office at andrea@alansbrown.com, telephone 203-259-7219.