Engaging Next Generation Audiences: A Study of College Student Preferences towards Music and the Performing Arts

Results of a Survey of Undergraduate Students on Seven University Campuses

Commissioned by the Hopkins Center for the Arts
at Dartmouth College

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Contents

Study Background

- With funding from The Andrew W. Mellon Foundation, the Hopkins Center for the Arts at Dartmouth College undertook a multi-site research effort in 2012 aimed at gauging how to maximize college students' performing arts participation and attendance, with a focus on the particular challenges of classical music. The study will culminate in spring 2013 with a national convening of students and presenters from Major University Presenters (MUP) campuses to analyze and form action recommendations out of the research.
- The project includes several research components, including: 1) case studies on exemplary practices in student engagement in the performing arts; 2) focus group discussions with students on each participating campus, and 3) an online survey of undergraduate students on each campus. The eight research partners are:
  - Hopkins Center for the Arts, Dartmouth College, Hanover, New Hampshire (commissioning partner)
  - Carolina Performing Arts, University of North Carolina, Chapel Hill, North Carolina
  - Hancher, University of Iowa, Iowa City, Iowa
  - Krannert Center for the Performing Arts, University of Illinois, Urbana-Champaign, Illinois
  - Lied Center of Kansas, University of Kansas, Lawrence, Kansas
  - Texas Performing Arts, University of Texas, Austin, Texas
  - University Musical Society, University of Michigan, Ann Arbor, Michigan
  - UW World Series, University of Washington, Seattle, Washington
- The overall study seeks to address a number of key questions about student engagement in the performing arts, including:
  - What preferences, attitudes and past experiences with the performing arts do students have when they arrive at college?
  - What types of presentations, formats and settings will attract students?
  - What should campus-based presenters be doing to better engage students? Knowing that not all students are alike, what strategies should be employed to attract different segments of students?
  - How can students be actively involved with performing artists and the creative process?
  - What introductory experiences should all students have access to, as a matter of policy? What programs should be mandatory? What are the potential curriculum connections?
- Oversight of the study was provided by Jeff James, Joseph Clifford and Julia Floberg of the Hopkins Center. A task force of representatives of each of the seven partner campuses was vitally involved at each step.
- Separate All reports may be downloaded from https://hop.dartmouth.edu/online/student_engagement

Executive Summary

- Music, in general, outpaces theatre and dance by a wide margin in the aesthetic landscape of current student participation in the performing arts. Twenty-two percent of students across the seven campuses report that they attend live concerts by professional singers or musicians "frequently," with another 48% reporting "occasional" attendance at live concerts (any style of music). The study did not explore visual arts or film participation.
  - While some level of pro-music bias may have resulted from the survey title ("Survey of College Students' Music Preferences"), concert-going, of any type, appears to be a deeply embedded behavior among undergraduate students.
- The curatorial mode of music consumption overwhelms other modalities of participation. Three-quarters of all students indicate that they "frequently" download or stream music from the Internet, and another 20% do so "occasionally." This corroborates focus group data indicating a strong interest among students in selecting and organizing music for their own listening pleasure, and in sharing their playlists via websites like Spotify.
  - Results suggest that arts presenters must be active in the streaming audio space if they want to interest students in the music of visiting artists.
- Not unexpectedly, the study found a highly predictive relationship between high school arts involvement and college involvement. In fact, high school involvement in band/orchestra or choir/vocal ensemble is highly predictive of positive attitudes about classical music and attendance in college.
  - Results suggest that performing arts presenters should do what they can to support high school music programs in their region, since these students are most likely to attend in college.
- On average, attitudes amongst non-arts students are divided in regards to whether "Learning about music, theater and dance is an important part of my college experience," with 44% percent agreeing with this statement, and 30% disagreeing.
  - Presenters and their campus advocates have more work to do to illustrate the relevance of their programs to academic life.
- In general, music preferences tend to be organized along two continua, one dimension spanning preference for the traditional genres of music (including classical, world music, jazz, opera, Broadway), from like to dislike, and another dimension spanning preference for contemporary forms such as hip hop and country, from like to dislike.
- Preference for classical music is relatively strong, compared to other styles of music. For example, "classical music," as a genre, is liked by 56% of respondents, compared to 55% for "rap or hip hop," and 50% for "house, trance or electronic dance music" and "jazz or blues." Only 17% of respondents indicated negative preference for classical music, compared to 23% for jazz or blues, and 55% for opera.
  - Results should dispel any lingering fears that classical music is disdained by a majority of students. We found no evidence of any "smoking gun" of distaste for classical music. The same is not true for opera, however, which appears to languish at the very fringe of the musical tastes of college students.

Executive Summary, continued

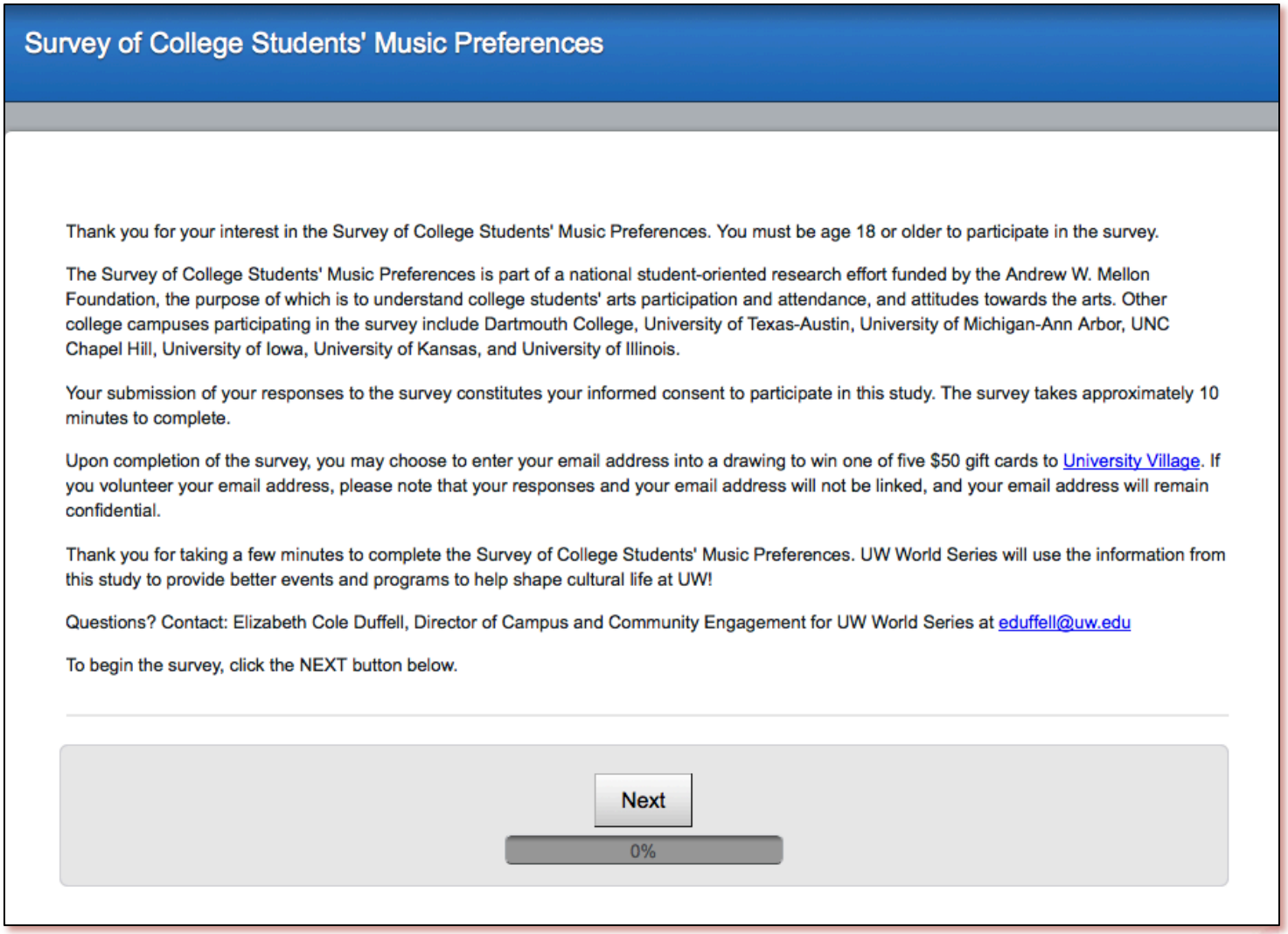
- The study suggests that three in ten students might be considered "classical music prospects" – with positive preference levels and an openness to attending a live classical concert, but not already attending regularly.
- The primary reasons cited for not attending are 1) "too busy" (which is really not a barrier); 2) "don't have anyone to go with" – a salient social barrier that presenters can address through ticket incentives and event strategies; and 3) "tickets cost too much" – which is the one barrier that presenters are, in fact, addressing systematically.
  - In fact, the social aspect of attendance is cited as both a motivation for attending (i.e., the power of a social invitation can circumvent all sorts of barriers), and as a barrier (lack thereof). Creating appropriate social opportunities is suggested as a critical aspect of building student participation, especially given that so many of them already enjoy classical music.
- Students learn about new or unfamiliar music in three ways: 1) through technology-aided discovery methods (i.e., streaming audio, social media, and playlists – by far the most prevalent channel of preference discovery); 2) through radio and television; and 3) through browsing stores, local clubs, and reading music reviews.
  - This is consistent with social media behavior patterns and consumption of digital media, and again illustrates the critical importance of digital media to student engagement.
- Music preferences appear to be malleable. While we did not gather longitudinal data on change in preferences over time, there are several indications that students "acquire preference" as they progress through their college years.
- Omnivorousness in musical tastes (apart from classical music) is strongly associated with classical music preference. In other words, students who like more different kinds of music are also more likely to enjoy classical music. This simply suggests that preference for classical music is not a lone phenomenon, but something that accrues with an appreciation for a wider array of music in general.
  - Presenters should avoid thinking narrowly about building preference for classical music, and think more holistically about supporting the musical development of students. Offering a wider choice of musical ingredients will expand the palette, and provide more opportunities for incremental growth.
- Traditional theatres and concerts halls are most preferred of all settings for classical concerts. Beyond those spaces, a variety of other settings are idealized, including outdoor settings (47%), museums and gallery spaces (34%) and coffee houses or bookstores (22%).
- Overall, results suggest that performing arts presenters should reconsider conventional notions of audience development to include "preference discovery" as an intermediate outcome bridging negative or neutral preference with positive preference. In other words, students must first be allowed to discover classical music in the context of their personal listening environment, before they can be expected to consider attending a live concert.
  - Then there is the matter of bridging the gulf between personal listening and concert attendance. Focus group results (separate report) discuss a number of strategies for transitioning students from classical music listening to classical music attendance.

Methodology and Sample Characteristics

Methodology

- Seven of the eight partners participated in the online survey portion of the study (i.e., all but Univ. of North Carolina).
- IRB approvals were sought and obtained on all campuses, assuring compliance with research standards and practices.
  - Respondents under age 18 were excluded from the study.
- On two campuses, permission was obtained to canvass the entire study body of undergraduates (Washington, Iowa). On the other campuses, the survey invitation was emailed to a random sample of between 2,800 and 9,000 undergraduate students. The overall response rate was 12%, based on the total number of outbound email addresses. A detailed response report appears on page 6.
- The survey protocol was designed by WolfBrown with input from the eight campus representatives. The design was informed by a previous study of student engagement in the arts conducted by WolfBrown for the Hopkins Center in 2007, by comments from advisor Steven Tepper of Vanderbilt University, and by a review of the scholarly research literature on musical tastes.
  - We are particularly indebted to UK researchers Mike Savage and Modesto Gayo for their article, "Unravelling the omnivore: A field analysis of contemporary musical taste in the United Kingdom," published in the journal *Poetics,* in 2011.
- The survey was piloted on the Dartmouth campus in March-April 2013, and launched on the other six campuses between September and November 2012.
- Different incentives were used on five of the seven campuses, typically a raffle for a food premium of some sort. In the case of Dartmouth, Kansas and Michigan, every survey respondent received a food premium (a printable coupon appeared on the last page of the survey). No incentive was used on two campuses (Texas, Iowa).
  - Any identifying information provided by students for use in fulfilling incentives was separated from survey data, and destroyed after the incentives were fulfilled.
- Introductory language described the survey as "…a survey about college students' music preferences." Therefore, we assume some level of pro-music bias in the survey results, as students with an interest in the survey subject matter (i.e., music) may have been more likely to click through and complete the survey. Nothing about the survey's focus on classical music was telegraphed in the introductory language.
  - Approximately 9% of all respondents who began the survey did not complete it. Most of these respondents answered only a few questions at the beginning of the survey.
- On average, 7% of survey respondents reported their area of study as being either music, dance, theatre, visual arts, or design/architecture, from a low of 5% (Dartmouth) to a high of 12% (Kansas). The remaining 93% reported non-arts areas of study.

Sample Survey Introduction



Survey of College Students' Music Preferences

Thank you for your interest in the Survey of College Students' Music Preferences. You must be age 18 or older to participate in the survey.

The Survey of College Students' Music Preferences is part of a national student-oriented research effort funded by the Andrew W. Mellon Foundation, the purpose of which is to understand college students' arts participation and attendance, and attitudes towards the arts. Other college campuses participating in the survey include Dartmouth College, University of Texas-Austin, University of Michigan-Ann Arbor, UNC Chapel Hill, University of Iowa, University of Kansas, and University of Illinois.

Your submission of your responses to the survey constitutes your informed consent to participate in this study. The survey takes approximately 10 minutes to complete.

Upon completion of the survey, you may choose to enter your email address into a drawing to win one of five $50 gift cards to University Village. If you volunteer your email address, please note that your responses and your email address will not be linked, and your email address will remain confidential.

Thank you for taking a few minutes to complete the Survey of College Students' Music Preferences. UW World Series will use the information from this study to provide better events and programs to help shape cultural life at UW!

Questions? Contact: Elizabeth Cole Duffell, Director of Campus and Community Engagement for UW World Series at eduffell@uw.edu

To begin the survey, click the NEXT button below.

Next

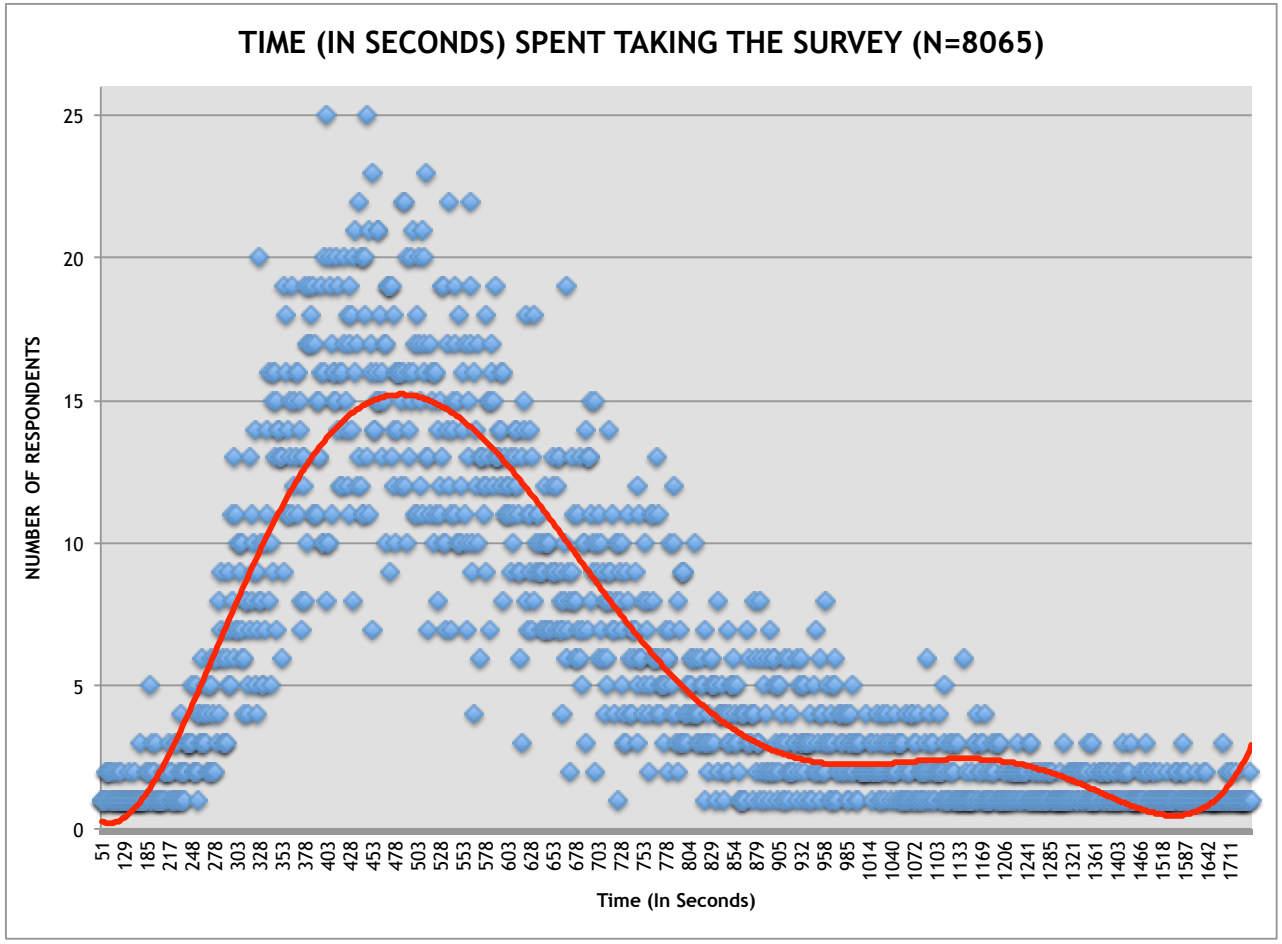
0%

Response Rates

RESPONSE RATES	# of Outbound Emails	# of Total Responses	Overall Reponse Rate	Reponse Rate, After Filtering for Ineligible or Incomplete Responses
Dartmouth	2,818	1,220	43%	38%
Texas	3,500	510	15%	12%
Kansas	5,983	607	10%	9%
Michigan	3,400	990	29%	25%
Iowa	20,425	1,976	10%	9%
Washington	28,323	2,603	9%	9%
Illinois	9,000	1,880	21%	19%
TOTAL	**73,449**	**9,786**	**13%**	**12%**

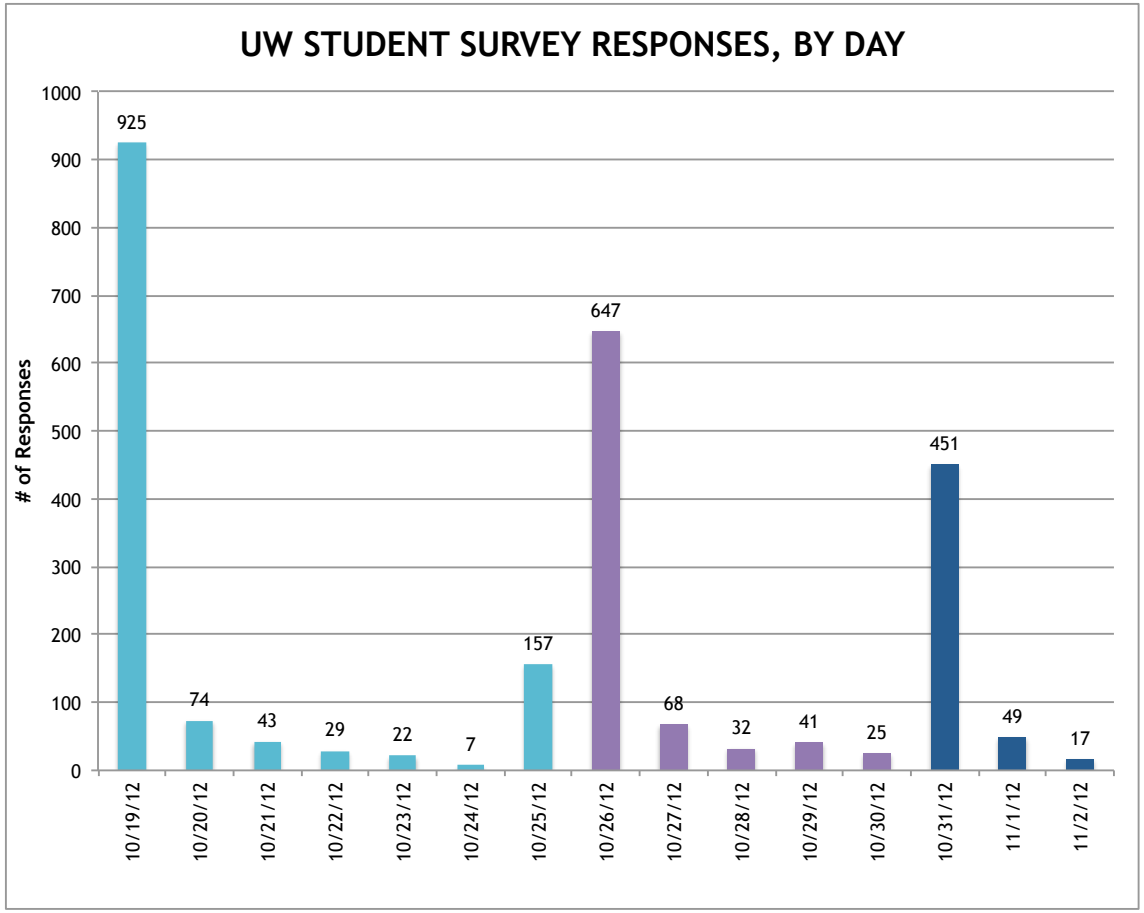
- Seven of the eight partners participated in the online survey (i.e., all but Univ. of North Carolina).
- Generally, two reminder email messages were sent approximately seven and 10 days after the initial invitation, and greatly boosted response.
- Response rates varied widely, from 9% to 38% across the seven campuses, with an overall seven-campus average of 13%.
- Variations in response rates may be due to:
  - Variation in use of incentives
  - Variation in timing of email broadcasts
  - Variation in email language (i.e., several campuses were required by IRB rules to include a lengthy disclosure statement in the email invitation)
  - Variation in the amount of student surveying done on each campus
  - Other factors beyond our control
- After filtering for eligibility and completeness, a total of 8,747 responses were included in the final analysis.
- Weights were applied to align the useable sample for each campus with total undergraduate enrollment on each campus, so that aggregate measures would not be distorted by the unequal sample sizes.
- Margins of error range from a low of +/- 1.9% (Washington) to a high of +/- 4.3% (Texas) at the 95% confidence level.
- Aggregate measures reported throughout this report are indicative only of the seven campuses surveyed, and should not be understood as representative of all college undergraduates.
  - That being said, survey results were remarkably consistent across the seven sites.

Time spent on taking the survey



- According to statistics provided by Survey Gizmo, the survey software platform used to field the survey, the median time spent on taking the survey was 566 seconds, or 9.4 minutes.
- Approximately 5% of all respondents spent 30 minutes or more on the survey, presumably leaving their browser open, and coming back to the survey later.

Response Patterns by Day, Illustrating the Importance of Reminder Messages



- Results for the University of Washington survey are tracked by day in the chart at left. The initial email invitation was broadcast on October 19, and generated 48% of total responses.
- Additional reminders on October 26 and October 31 generated 31% and 20% of the total sample, respectively.
- About 85% to 90% of everyone who's going to take the survey completes it within 24 hours of the email broadcast.
  - Results clearly illustrate the value of repeated reminder emails on surveys of this nature.

Sample Demographics

DEMOGRAPHIC PROFILE	Total Sample (n=8747)	Dartmouth (n=1073)	Illinois (n=1665)	Iowa (n=1762)	Kansas (n=560)	Michigan (n=844)	Texas (n=423)	Washington (n=2420)
Gender								
Female	60%	63%	54%	61%	57%	67%	55%	65%
Male	40%	37%	46%	39%	43%	33%	45%	35%
Class Level								
First Year	28%	30%	24%	28%	26%	28%	35%	29%
Sophomore	22%	23%	24%	21%	21%	26%	22%	20%
Junior	25%	22%	25%	24%	28%	25%	23%	26%
Senior	24%	24%	27%	27%	24%	22%	20%	24%
Age								
18	23%	14%	19%	20%	20%	27%	31%	28%
19	22%	24%	22%	22%	20%	24%	24%	21%
20	21%	23%	25%	20%	20%	24%	16%	19%
21	17%	22%	22%	17%	16%	17%	13%	17%
22	8%	14%	9%	9%	9%	4%	7%	6%
23	2%	2%	2%	3%	3%	1%	3%	2%
24	1%	1%	1%	2%	3%	0%	1%	1%
25+	5%	1%	2%	7%	9%	2%	5%	6%
Race/Ethnicity (Combined)								
African American	2%	6%	3%	1%	3%	3%	3%	1%
Asian or Asian American	18%	21%	26%	5%	7%	18%	14%	32%
White	66%	57%	62%	84%	78%	66%	48%	51%
Hispanic, All Races	9%	8%	6%	7%	7%	7%	31%	7%
Other Race or Multi Racial	5%	9%	4%	3%	4%	6%	4%	9%
Urbanicity of Home Town								
Rural	14%	12%	11%	22%	16%	12%	9%	10%
Small City	16%	7%	10%	23%	15%	14%	22%	14%
Suburban	52%	62%	58%	42%	54%	59%	47%	51%
Urban	18%	19%	20%	13%	15%	15%	23%	24%

- The table on this page reports unweighted demographics by site.
- Overall, the data set reflects a 60/40 female skew, although we are unsure of the extent to which this deviates from actual enrollment.
- The distribution of class level is slightly skewed towards first-year students, but otherwise rather well distributed.
- In compliance with IRB requirements, students under the age of 18 were ineligible to take the survey. A number of respondents, mostly seniors, reported ages above 22.
- Overall, approximately 36% of all respondents reported a non-white race or ethnicity, predominantly Asian or Asian American (18%) and Hispanic (9%).
- The majority of students hail from suburban areas (52%), while just 14% hail from rural areas (highest for Iowa, at 22%).
- Based on an assessment of the demographic results, simple weights were applied to adjust for actual enrollment on each campus. These weights will only affect aggregated results.

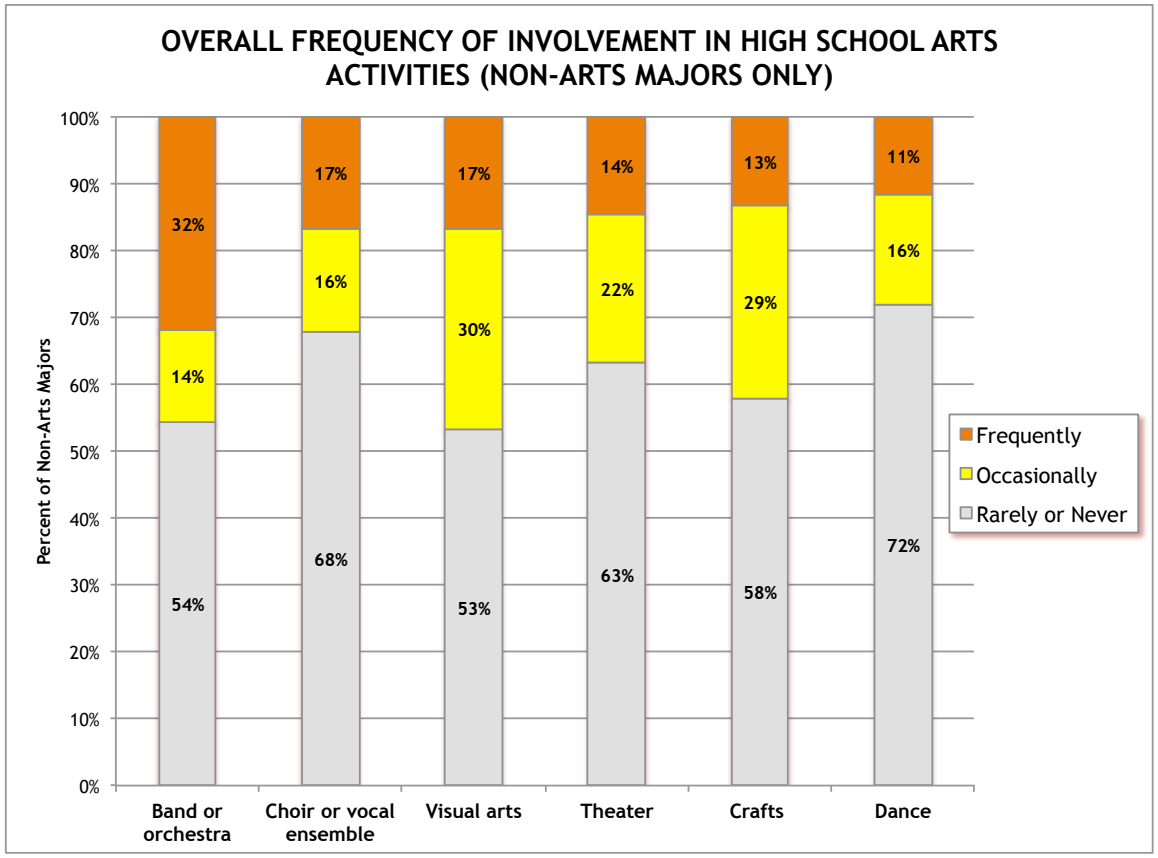
Area of Academic Study

AREA OF ACADEMIC STUDY	Total Sample (n=8040)	Dartmouth (n=967)	Illinois (n=1539)	Iowa (n=1600)	Kansas (n=523)	Michigan (n=767)	Texas (n=360)	Washington (n=2284)
Area of Study - Full List (sorted by prevalence)								
Engineering	15%	9%	26%	9%	14%	17%	14%	16%
Business or Management	11%	9%	11%	14%	12%	7%	11%	10%
Pre-Med	10%	14%	8%	8%	9%	16%	8%	11%
Psychology, Social Work, or Social Science	10%	15%	7%	11%	9%	10%	6%	10%
Science and Technology	9%	9%	7%	7%	6%	7%	12%	12%
Literature, Languages, History or Cultural Studies	8%	13%	5%	9%	7%	6%	7%	8%
Health Care or Public Health	6%	2%	5%	10%	8%	6%	4%	5%
Visual Art, Design or Architecture	4%	3%	3%	3%	7%	2%	5%	4%
Undecided	4%	5%	3%	3%	3%	5%	5%	4%
Other (please specify)	3%	4%	4%	4%	4%	3%	2%	3%
Math or Physics	3%	5%	4%	2%	3%	4%	3%	4%
Communications	3%	0%	3%	3%	1%	4%	8%	3%
Education	2%	1%	3%	4%	4%	2%	4%	2%
Natural Resources & Environment	2%	3%	2%	1%	0%	2%	1%	4%
Pre-Law	2%	4%	2%	2%	1%	3%	1%	2%
Music	2%	1%	2%	3%	3%	2%	4%	1%
Journalism	2%	1%	1%	3%	7%	1%	2%	1%
Public Policy	1%	3%	1%	1%	1%	1%	1%	1%
Agriculture, Farming or Veterinary Medicine	1%	0%	4%	0%	0%	0%	1%	0%
Theater	1%	1%	1%	1%	1%	1%	2%	1%
Dance	0%	0%	0%	1%	0%	1%	1%	0%
Percent Arts-Related Majors	7%	5%	6%	8%	12%	6%	11%	6%

- Students were asked to indicate their area of study. Results vary by site, following the academic profiles of the respective universities.
- To facilitate analysis, the 21 individual categories were consolidated into nine groupings. This was especially helpful in isolating students with arts-related majors, including theatre, dance, music, and visual art, design or architecture students. This figure ranged from a high of 12% for Kansas, to a low of 5% for Dartmouth.
- The nine groupings are (with total % of weighted sample):
  - Agriculture Farming or Veterinary Medicine Natural Resources (3%)
  - Business Management Public Policy Pre Law (14%)
  - Communications Journalism (6%)
  - Dance Music Theatre Visual Art Design Architecture (8%)
  - Engineering Science Technology Math Physics (28%)
  - Literature Languages History Cultural Studies (7%)
  - Health Care Public Health Pre Med (16%)
  - Psychology, Social Work Social Science Education (12%)
  - Other or Undecided (7%)
- Many of the analyses throughout the report are based on figures for non-arts majors only, to reduce pro-arts bias.

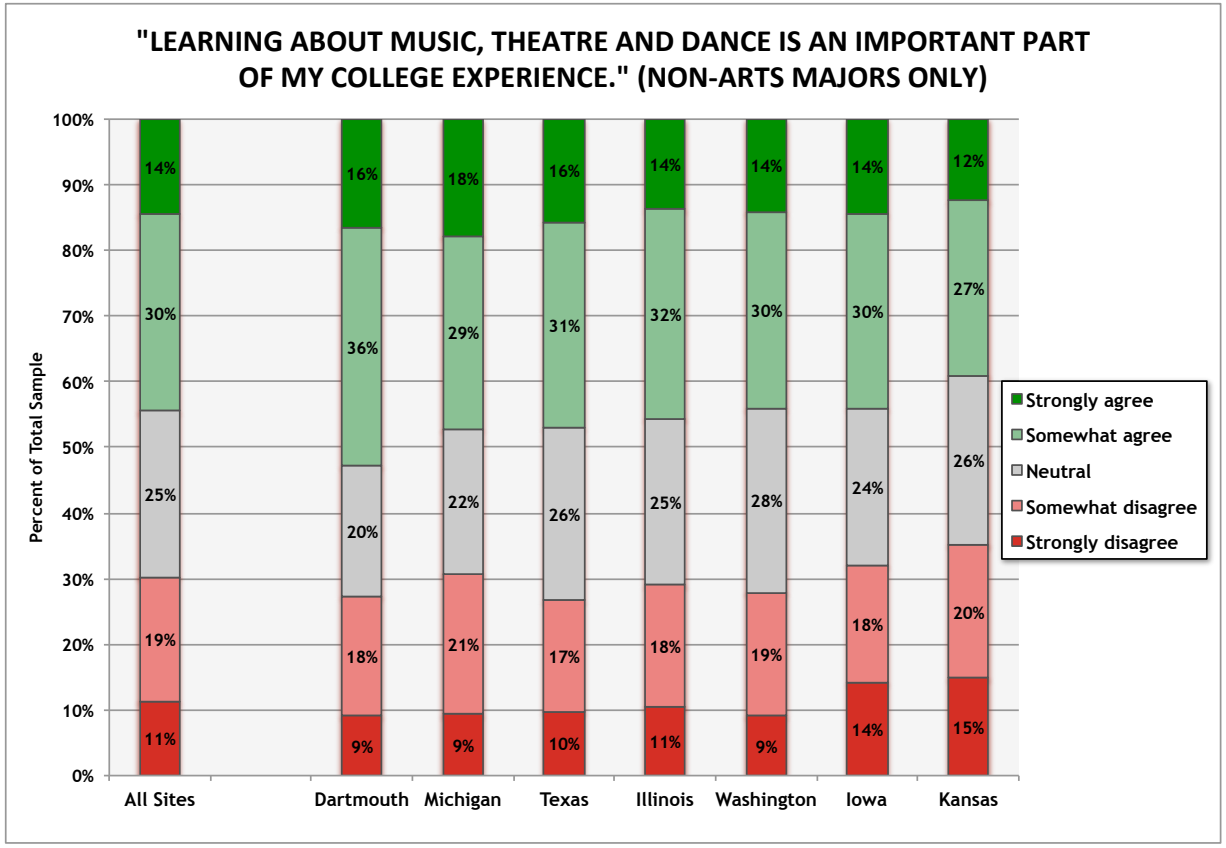
Arts Involvement, Before and After Arriving at College

High School Arts Activities



- Students were asked, "During your high school years (in or out of school), how often did you participate in the following activities?" Overall results for the six activities are illustrated in the chart at left.
- These results reflect only non-arts students.
- "Band or orchestra" was a frequent activity for 32% of respondents, with smaller percentages involved in other activities.
- The average student indicated 2.3 activities. Variation across sites was minimal – slightly higher for Washington (2.4), and slightly lower for Michigan and Texas (2.1).
- High school arts activity was much higher for females (2.7 activities, on average) compared to males (1.6).
- Students who hail from suburban areas were least likely to report high school arts activity (2.1 activities, on average), while students from rural areas were most likely (2.6 activities, on average).
- No pattern is evident by age or class level.

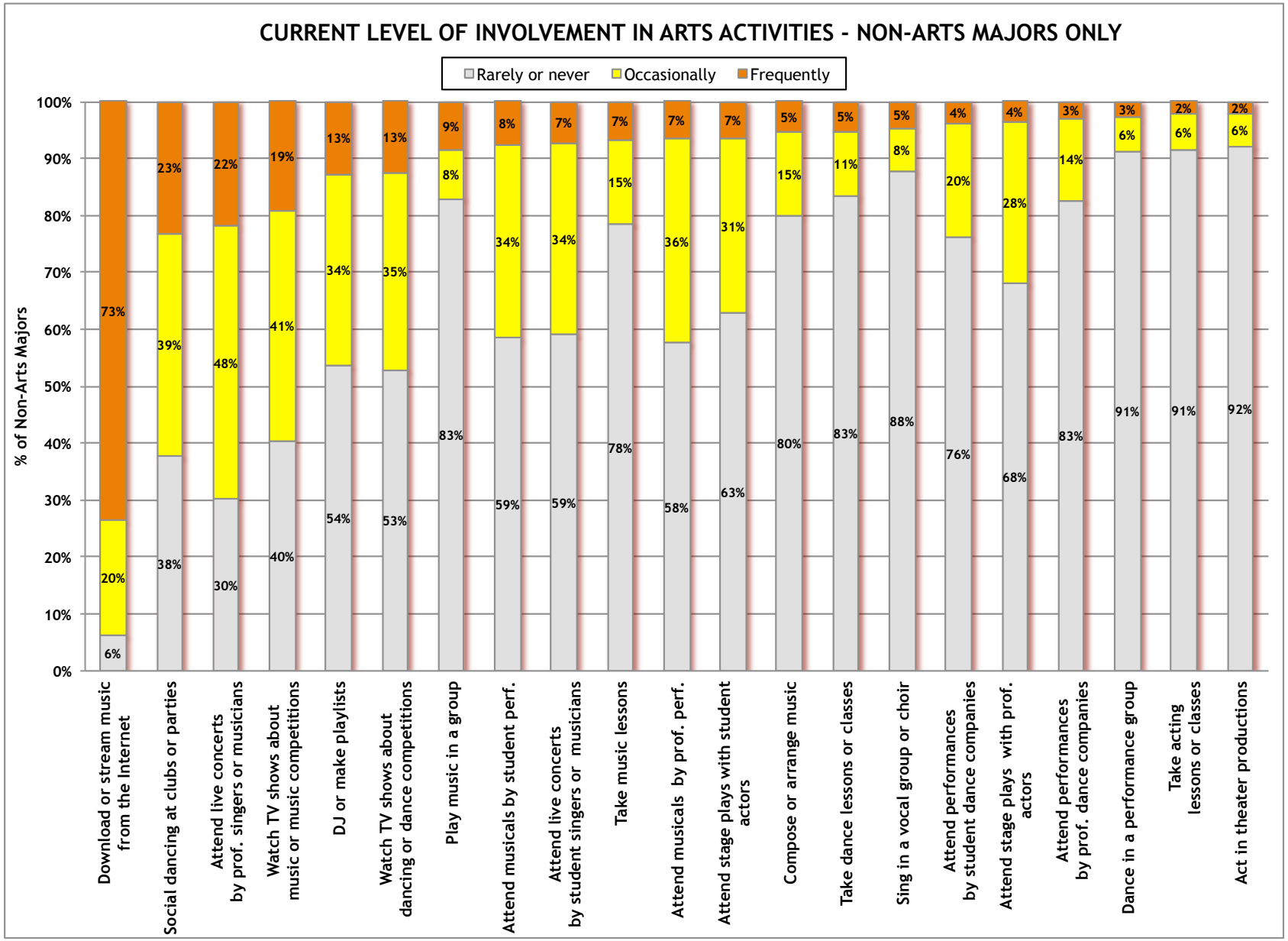
Students' belief that the arts are an important part of their college education



- Students were asked how much they agreed with the statement, "Learning about music, theater and dance is an important part of my college experience" to investigate the extent of "pro-arts" attitudes.
- On average, students are split about the role of the performing arts in their education, with a skew towards pro-arts attitudes. Forty-four percent agree with the statement on some level, while 30% disagree on some level. A quarter of respondents are unsure.
- Little variation was observed across the seven sites.
- Respondents identifying as Hispanic or Asian/Asian American were significantly more likely to agree with this statement, while white and African American respondents were less likely to agree.
- Involvement in high school arts activities is highly predictive of agreement with this statement, explaining 12% of the variance.
  - The relationship between high school involvement and college arts activity will be further explored later in the report. Numerous findings will point to the importance of supporting high school arts programs.

Current Arts Involvement, among Non-Arts Majors

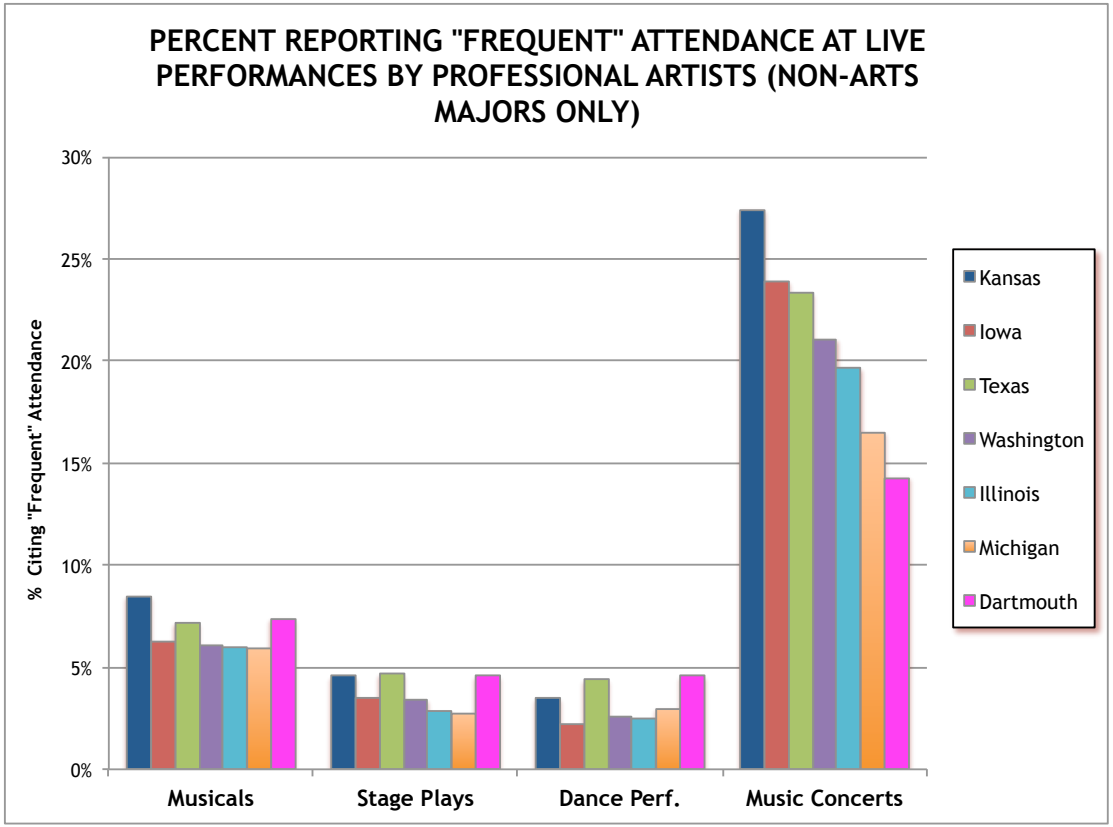
(Frequency of current involvement in 21 arts activities, aggregated sample, non-arts majors)



Current Arts Activities – Key Observations

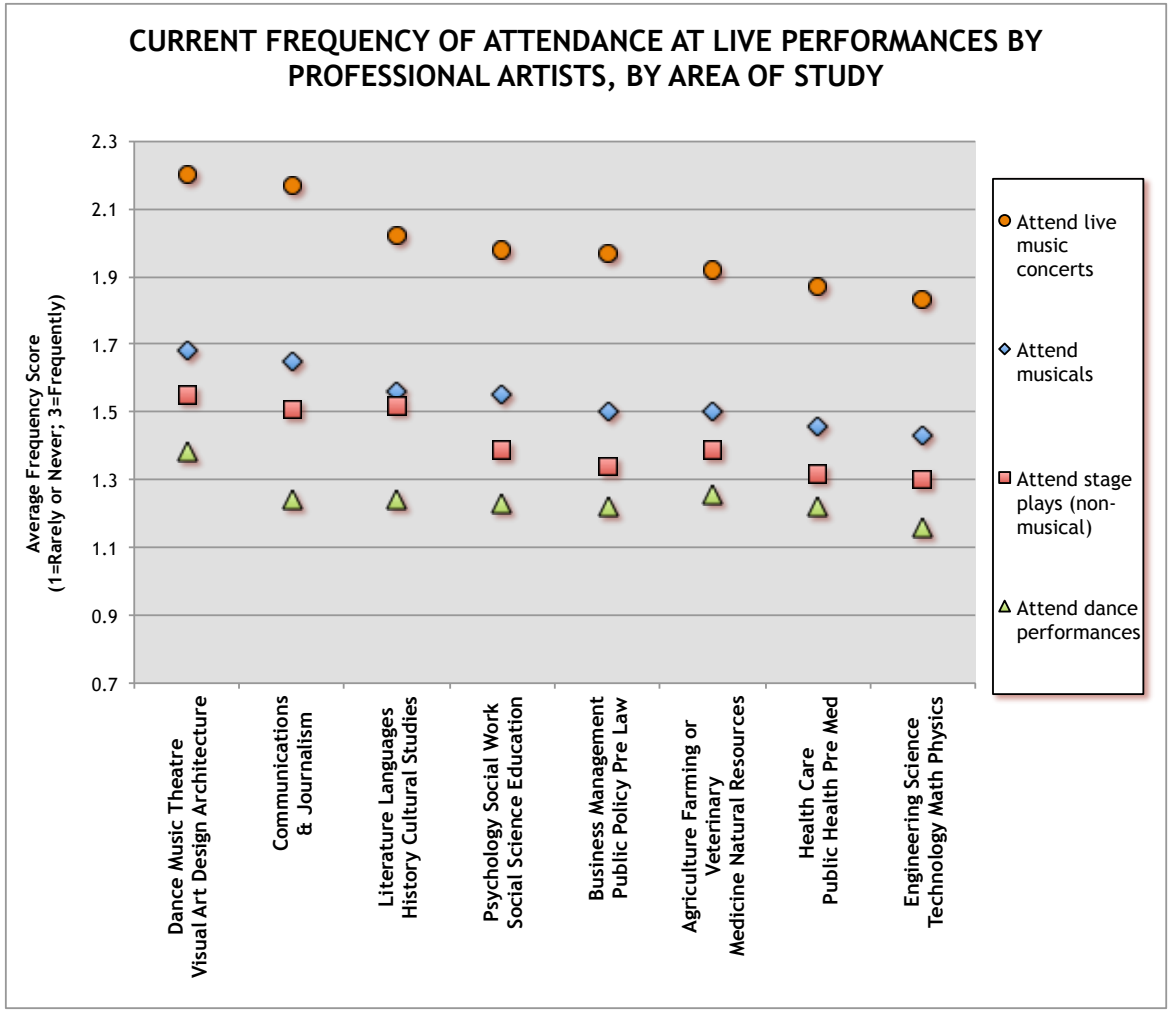
- Students were asked to indicate their current frequency of participation in 21 different music, dance and theatre activities (see chart on previous page). Within each discipline, a range of activities was specified, representing the four modalities of participation: inventive, interpretive, curatorial and observational.
- Music consumption via digital files or streaming audio is, by far, the most frequent of all activities, with 73% of students indicating that they do this activity "frequently" and another 20% indicating that they do it "occasionally.")
- Social dancing is the second most prevalent activity (23% participate "frequently"), which of course is a musical activity as well as a dance activity.
- Note that 60% of all students indicated that they "watch television shows about music or music competitions" and nearly 50% "watch television shows about dance or dance competitions" at least occasionally, illustrating the profound influence of the reality television shows on public tastes in music and dance.
  - How might campus presenters tap into the strong vein of interest in media-based participation?
- "Attending live concerts by professional singers or musicians" is the third most frequent activity, with 22% reporting "frequent" participation, and 48% reporting "infrequent." Thus, seven in 10 students have some level of current involvement in live concert attendance (any type of music). Note that students reported attending live concerts at a significantly higher rate than plays or musicals.
  - Results lead us to conclude that concert-going, in general, is a highly valued activity amongst students.
- Students also reported a relatively high level of engagement in "DJ or make playlists," the curatorial mode of music participation, which corroborates focus group data indicating strong interest in organizing music and curating personal playlists and online music channels.
- Overall, music activities correlated more closely with theatre activities than dance activities (Pearson correlation coefficients of .41 vs. .30, respectively).
- Levels of participation in music activities were very consistent across the seven campuses, while levels of dance and theatre participation were higher at Dartmouth, on average, but otherwise consistent across the other six sites.
- On average, females reported higher activity levels in dance and theatre, while music activity levels were the same for males and females.

“Frequent” attendance at live professional arts events, by site



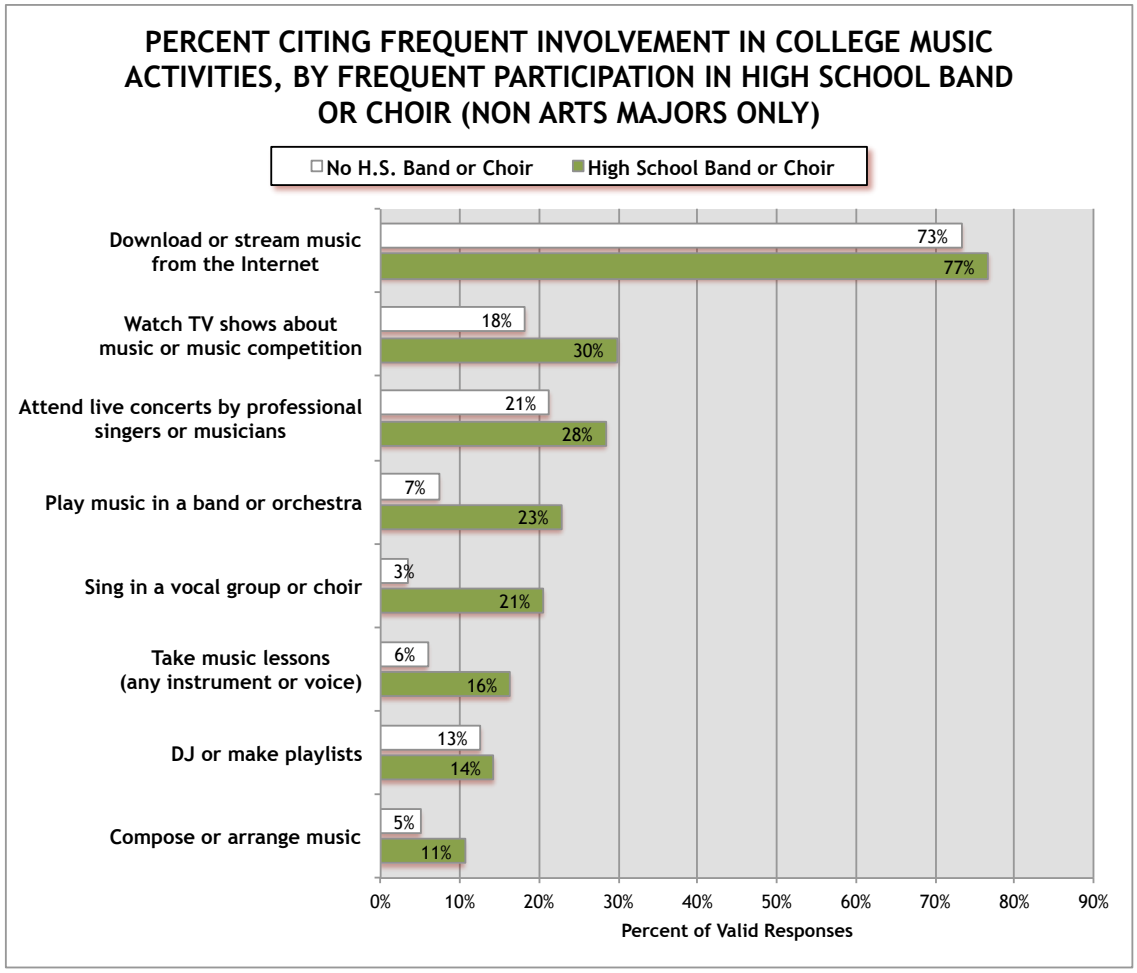
- Looking now at the percentages of students who reported “frequent” attendance at live professional arts events, we see the clear dominance of music concerts over plays, musicals and dance performances.
- Little variation was observed across the seven sites with respect to plays, musicals and dance performances, but significant variation was observed with respect to music concerts, with 27% of Kansas students reporting “frequent” concert attendance, vs. 14% for Dartmouth students.
  - These figures refer to all types of music concerts featuring professional musicians (e.g., rock, Hip Hop, classical) and do not necessarily reflect attendance at concert presentations offered by the respective campus presenters.

Relationship between Current Levels of Attendance at Live Professional Arts Events, by Area of Study



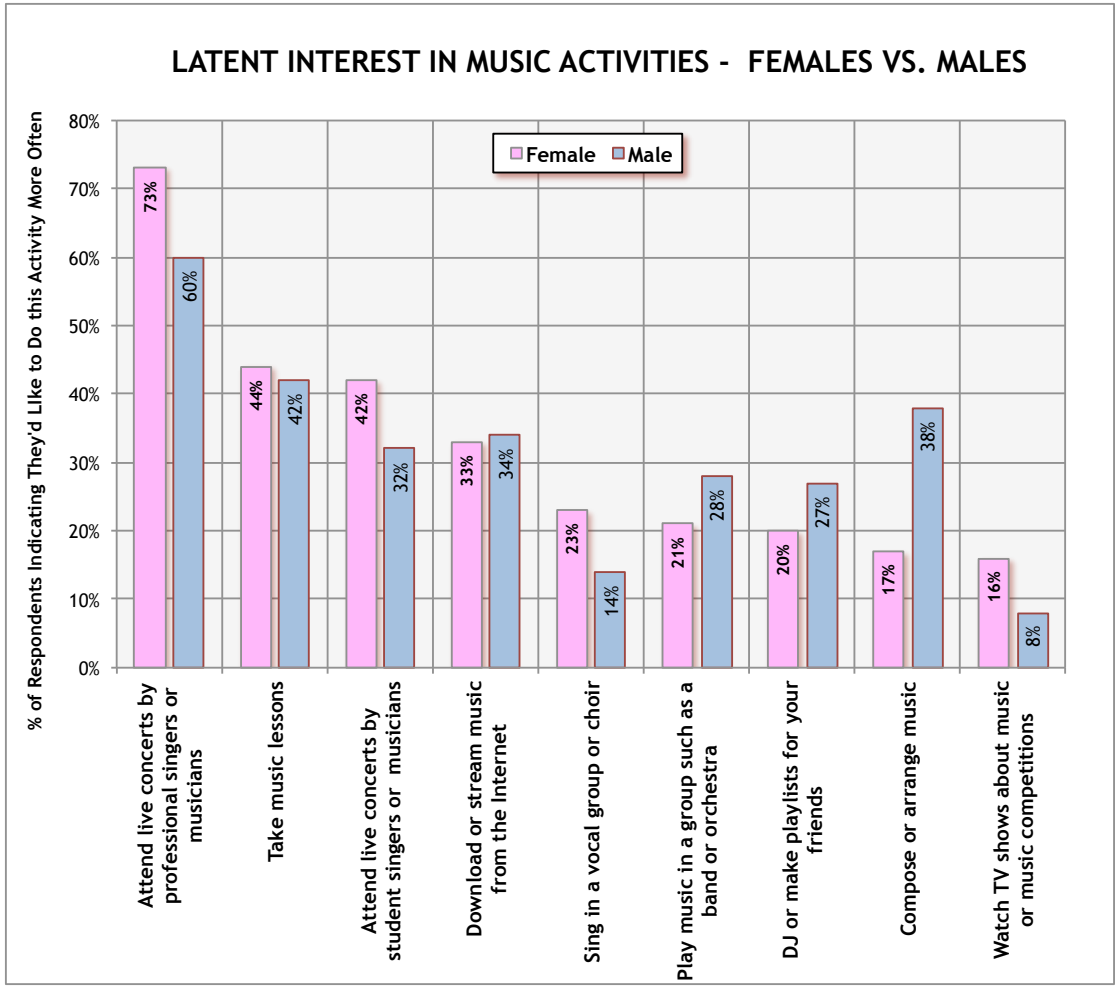
- As would be expected, arts majors (a blend of music, dance, theatre, visual arts and design/architecture) reported the highest levels of current attendance at live professional arts events (i.e., not student performers), but not by a wide majority compared to students in other academic areas, as illustrated in the chart at left.
  - Here, we use average frequency scores as the basis for comparison.
- Communications and journalism students reported the second highest levels of concert attendance, while engineering students reported the lowest levels of attendance overall.
- For music concerts by professional artists, students at Kansas, Iowa and Texas reported slightly higher frequency levels, compared to other campuses (not shown).
- Females were more likely to report frequent attendance at dance and theatre events, but equally likely as males to report frequent attendance at music concerts (not shown).

Relationship between High School Arts Activity and Current Arts Activity



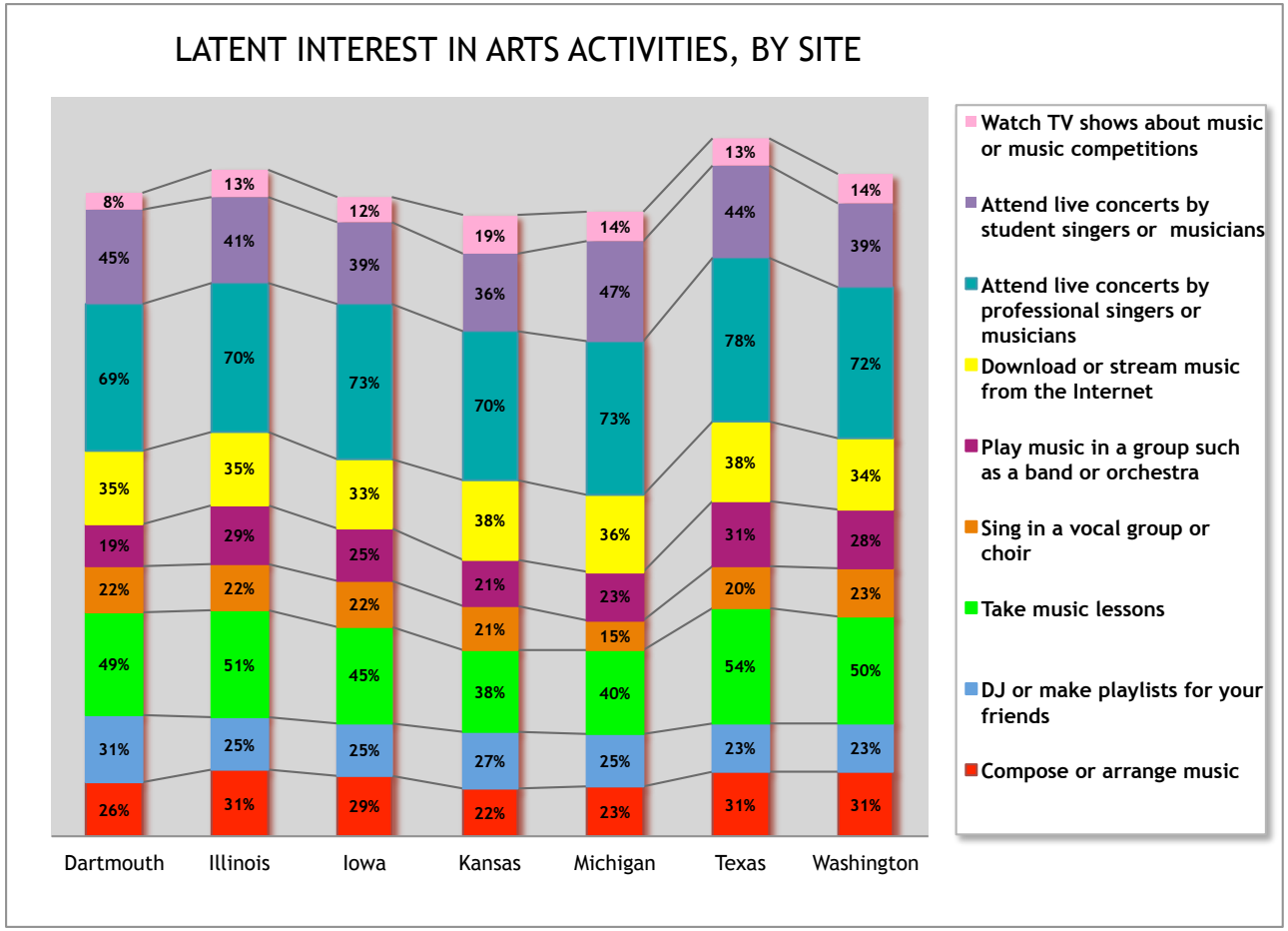
- Looking at overall levels of high school involvement in six participatory arts activities vs. an aggregated indicator of current levels of arts involvement in college, regression analysis finds an extremely predictive relationship, as would be expected. A total of 23% of the variance in the aggregate measure of college arts activity is explained by high school arts activity.
- More specifically, college music activities are heavily influenced by frequent participation in high school band/orchestra or choir (see chart at left).
- For example, 21% of students who reported "frequent" participation in high school band/ orchestra or choir reported "frequent" current involvement in "sing in a vocal group or choir" compared to just 3% of those who did not report frequent high school participation. In other words, students with frequent high school music participation are six times more likely to sing in a college vocal group, and three times more likely to play in a college band or orchestra.
- Students who participated frequently in high school band/orchestra or choir are 34% more likely to report frequent concert-going (any type of music) in college.
  - Again, results suggest the importance of high school music involvement to college arts attendance, and support outreach to high school music programs.

Latent Interest in Music Activities

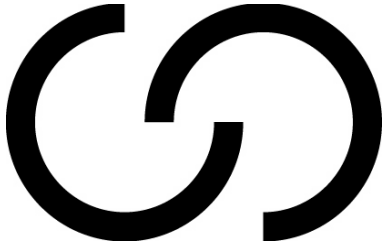


- Students were asked which music activities, if any, they'd like to do more often than they do now (multiple responses allowed).
- Overall, 68% of students indicated an interest in attending more "concerts by professional singers or musicians," while 38% indicated an interest in attending more "concerts by student singers or musicians."
  - In general, these figures seem very high, and should be regarded as a general expression of interest, and not as an indication that large numbers of students are ready to attend classical concerts (at any cost).
- It is particularly interesting to note that 43% of students indicated an interest in taking music lessons, and 25% indicated an interest in composing or arranging music.
- Interesting differences were observed between females and males (see chart at left). For example, females were more likely to report latent interest in attending live concert and singing in a vocal group, while males were twice as likely as females to report latent interest in composing or arranging music (28% vs. 17%, respectively), and also more likely than females to be interested in DJ-ing or making playlists (27% vs. 20%, respectively). These figures are highly significant, statistically.
  - How might campus presenters capitalize on males' interest in these activities?

Latent Interest in Music Activities, by Site

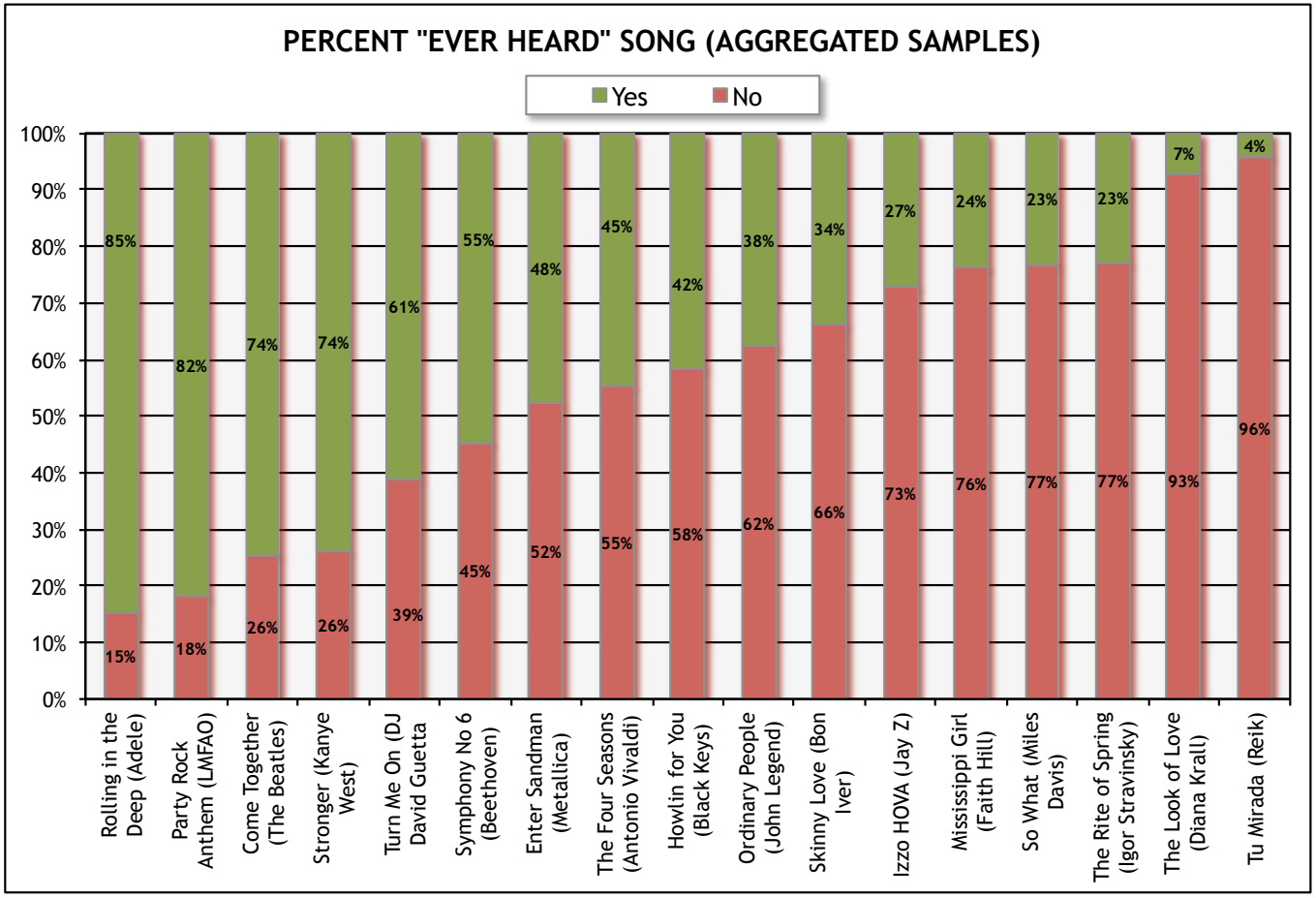


- Levels of latent interest in music activities varied a bit across the seven sites.
- For example, latent interest in taking music lessons (the green bars at left) range from a high of 54% (Texas) to a low of 38% (Kansas).
- Similarly, latent interest in playing in a music group such as a band or orchestra (the maroon bars at left) varied from a high of 31% (Texas) to a low of 19% (Dartmouth).
- Interest in attending more concerts by professional singers or musicians was also highest at Texas (78%).



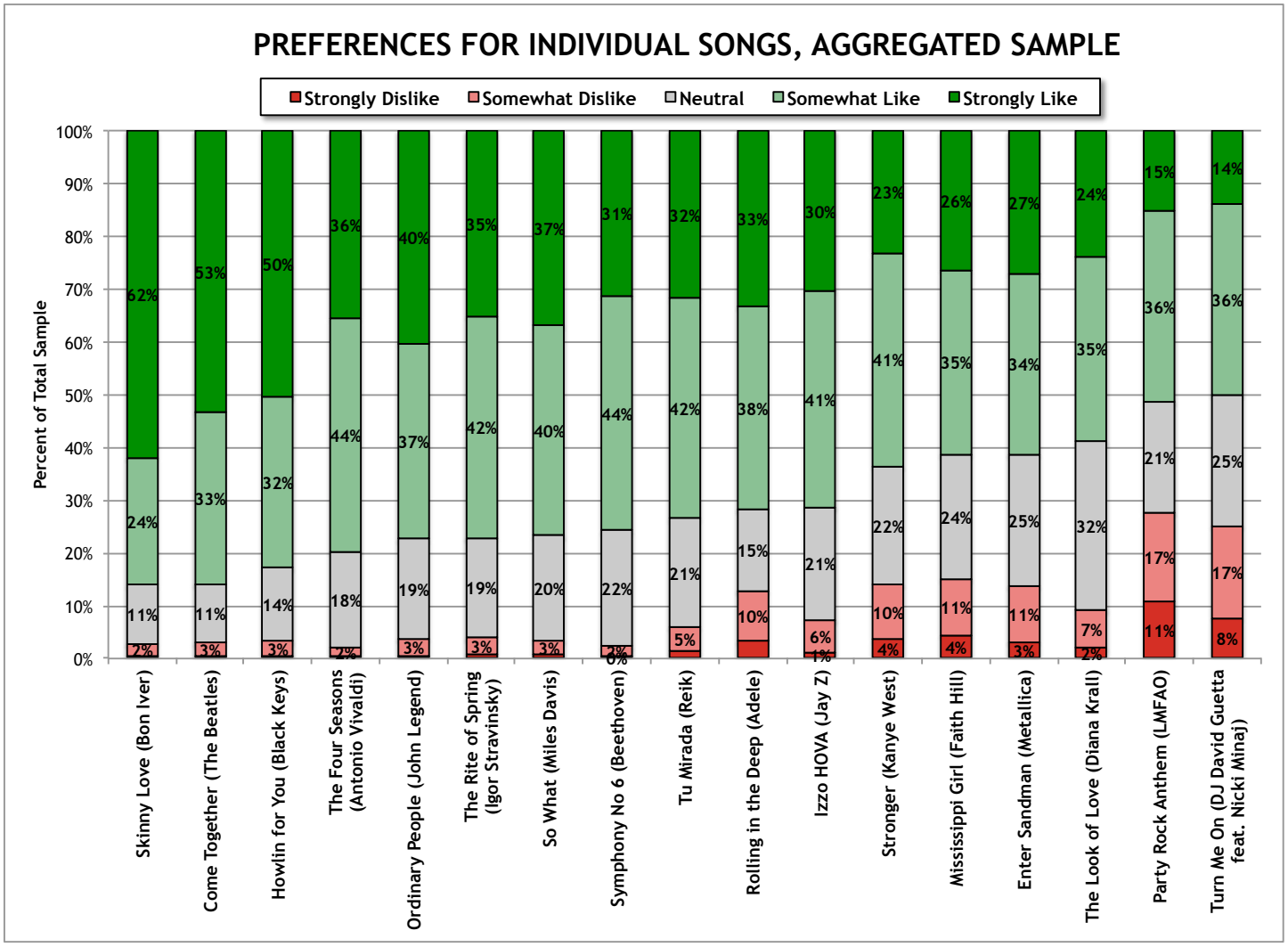
Music Preferences

Familiarity with 17 Songs, Representing a Diverse Cross-section of Music



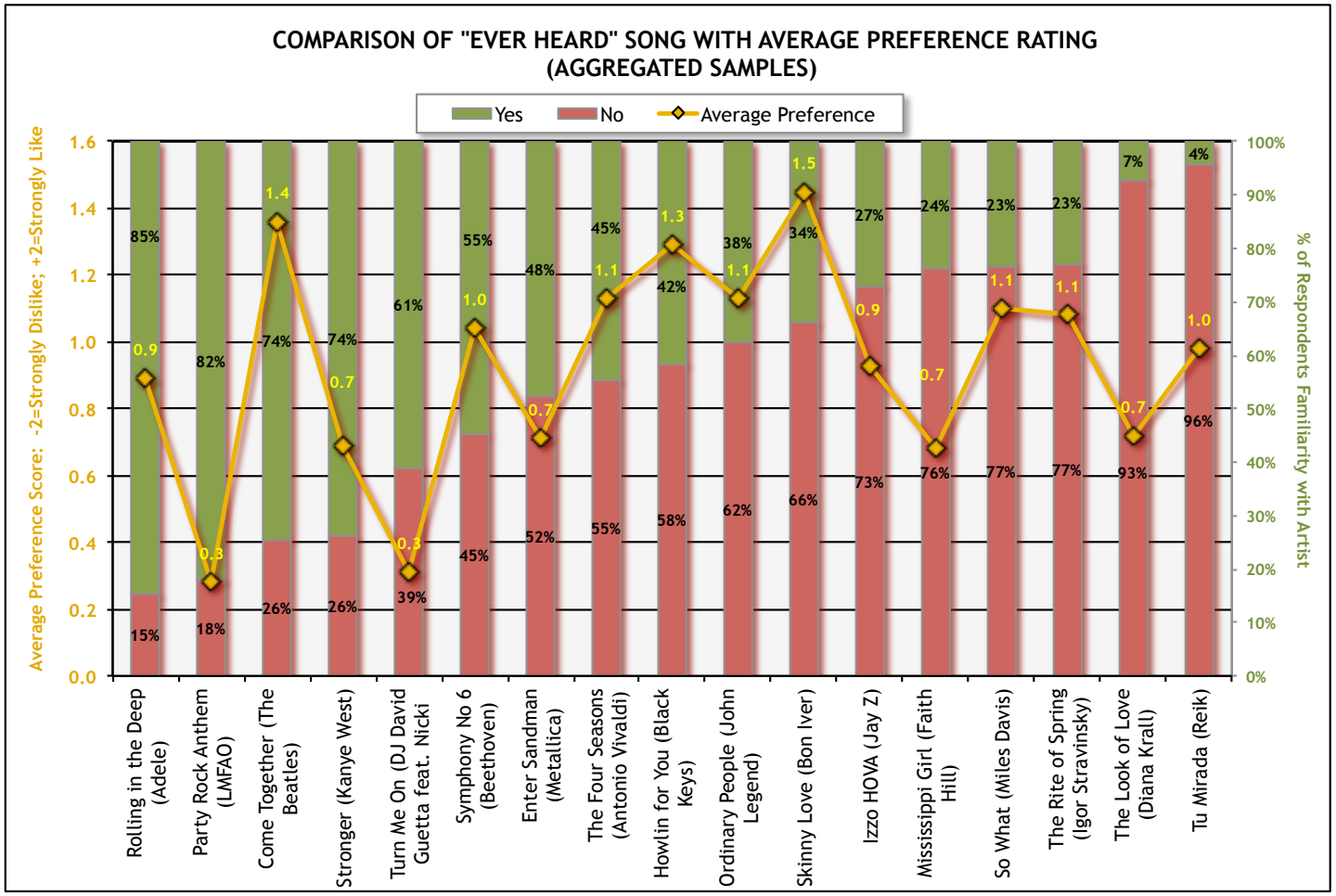
- In order to gain a more nuanced understanding of music preferences, students were asked a two-part question about a wide cross-section of 17 specific "songs" representing different genres of music. First, students were asked whether or not they had ever listened to the song. Audio samples were provided. General frequencies for the combined samples are shown at left.
- Familiarity ranged from a high of 85% for Adele's *Rolling in the Deep* to a low of 4% for Reik's *Tu Mirada*, a cut from the Mexican pop group's 2011 album *Peligro*.
- Of the three classical music pieces tested, familiarity was highest for Beethoven's *Symphony No. 6* (55%), followed by Vivaldi's *The Four Seasons* (45%), and then Stravinsky's *Rite of Spring* (23%) – the same level of familiarity as Miles Davis's 1959 classic *So What*.

Preference Levels for 17 Individual Songs, among Those Who've Heard Them



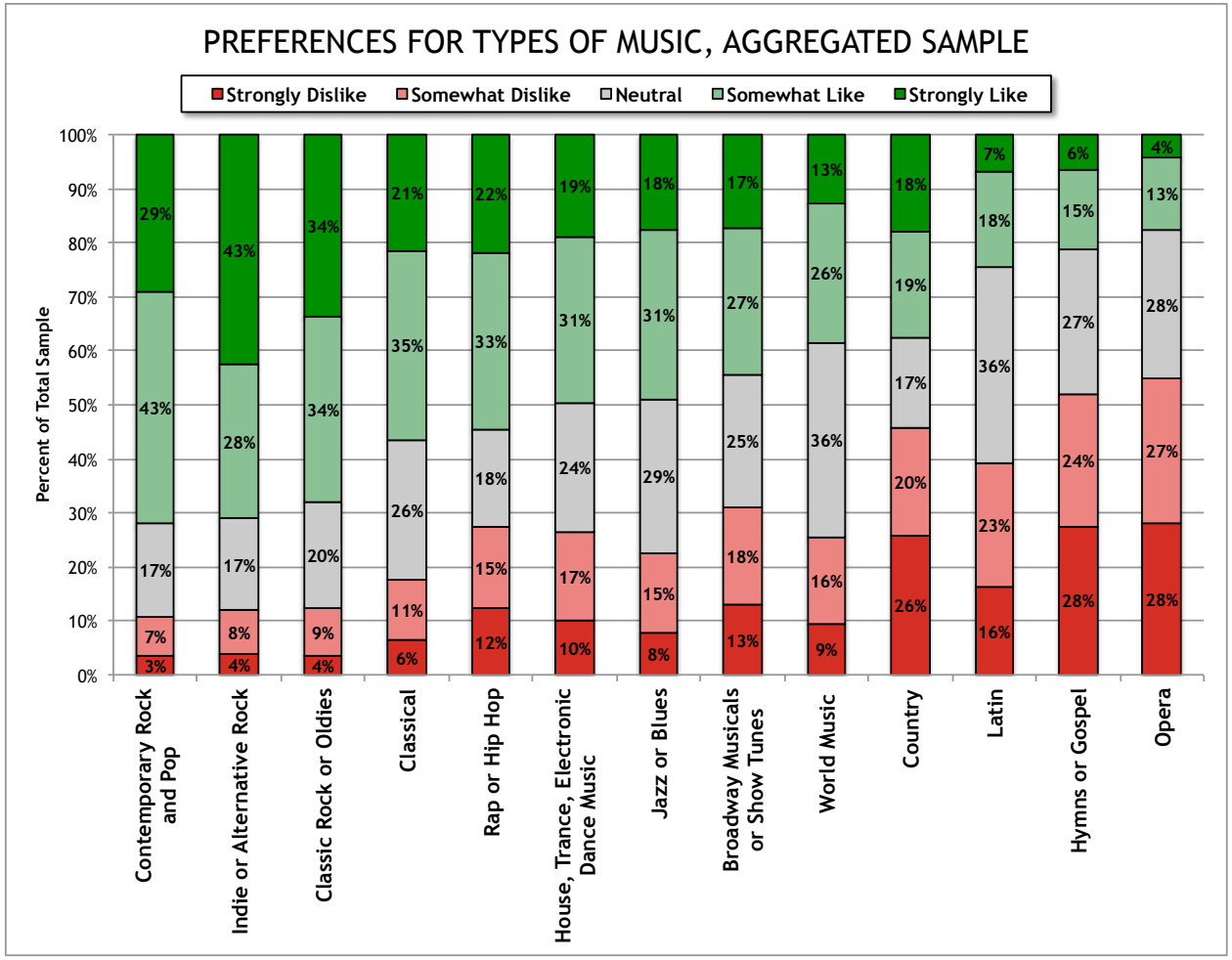
- Students who had previously heard a given song were then asked to rate how much they liked the song using a scale of "strongly dislike" to "strongly like."
- Most students like the songs they know, although many are neutral.
  - It makes sense that people generally don't make an effort to get to know music they'll probably not like.
- Bon Iver's *Skinny Love* received the highest preference ratings among the pool of respondents who've previously heard that song (62% 'strongly like').
- Two songs, in particular, generated about 25% negative preference levels: *Party Rock Anthem* by LMFAO and *Turn Me On* by DJ David Guetta feat. Nicki Minaj.
- The three classical music pieces generated similarly positive preference levels, with about 75% to 80% expressing positive feelings about each piece.

Familiarity vs. Preference for 17 Songs



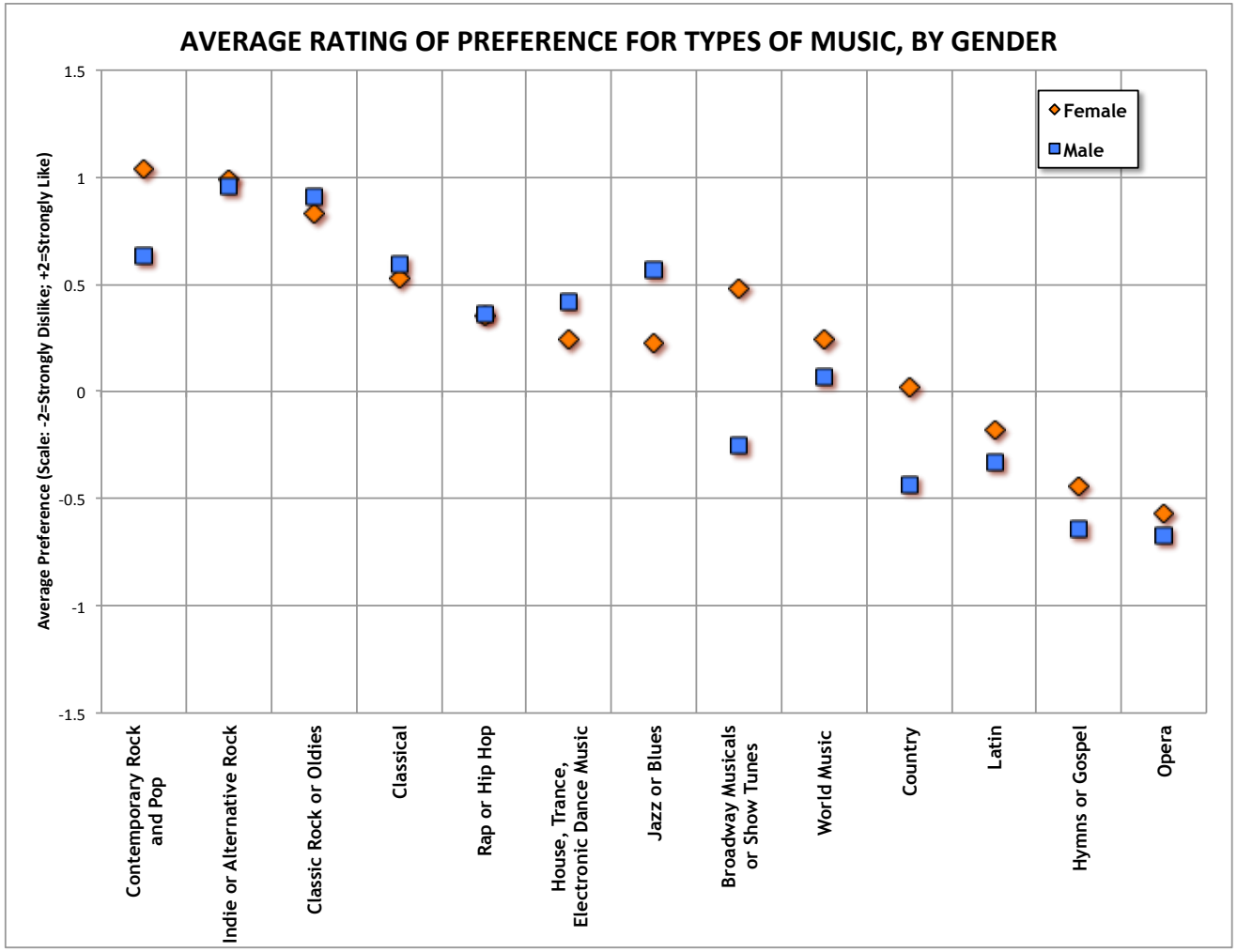
- The chart at left combines familiarity level with preference level for each song.
- In some cases, such as with *Party Rock Anthem*, familiarity is high compared to other songs, but average preference rating is relatively low. In other cases, such as with Bon Iver's *Skinny Love*, Miles Davis's *So What*, familiarity is comparatively lower, but preference ratings are stronger.
- The Vivaldi and Beethoven fare relatively well in this analysis, with above-average preference ratings, and above average familiarity. The Stravinsky is less well-known, but equally liked.

Preference Results by Music Genre



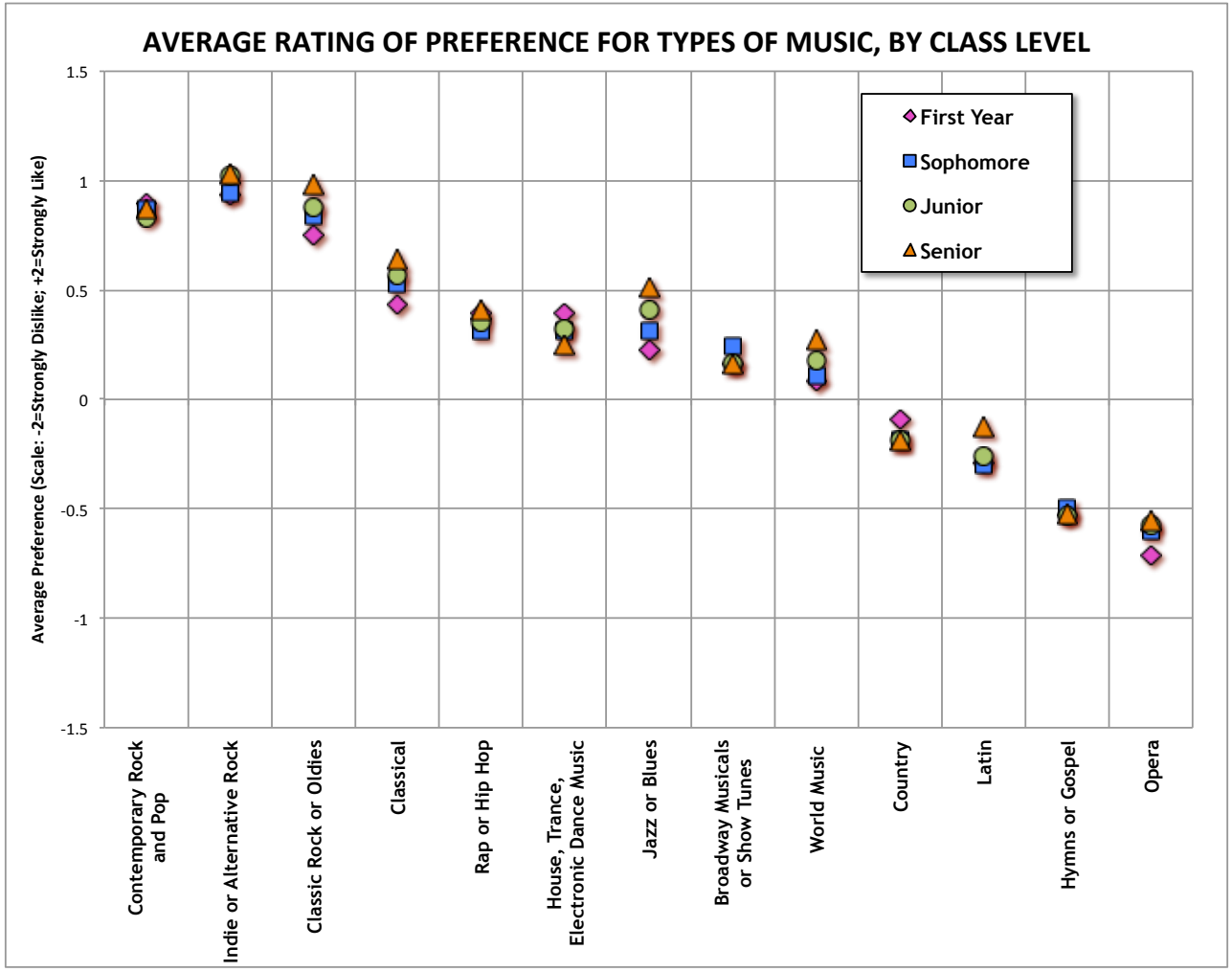
- Music preferences were also investigated with respect to genres. The chart at left reports overall preference levels for 13 genres of music for the aggregate sample.
- "Contemporary Rock and Pop" is the most popular category, with 29% reporting strong affinity, and another 43% reporting some affinity, followed closely by "Indie or Alternative Rock," about which more students feel very strongly (43% "strongly like").
- Other rock styles are also well-liked by the student population:
  - Sixty-eight percent "somewhat like" or "strongly like" "classic rock and oldies."
- "Classical music" is equally liked compared to "Rap or Hip Hop" – actually a bit more liked, as "classical music" lacks the negative preference associated with "Rap or Hip Hop."
- Note also that "classical music" is preferred a bit more than "jazz or blues."
- Results clearly illustrate the extent to which "opera" is marginalized in the music spectrum – just behind "hymns or gospel."

Differences in Preference Levels, by Gender



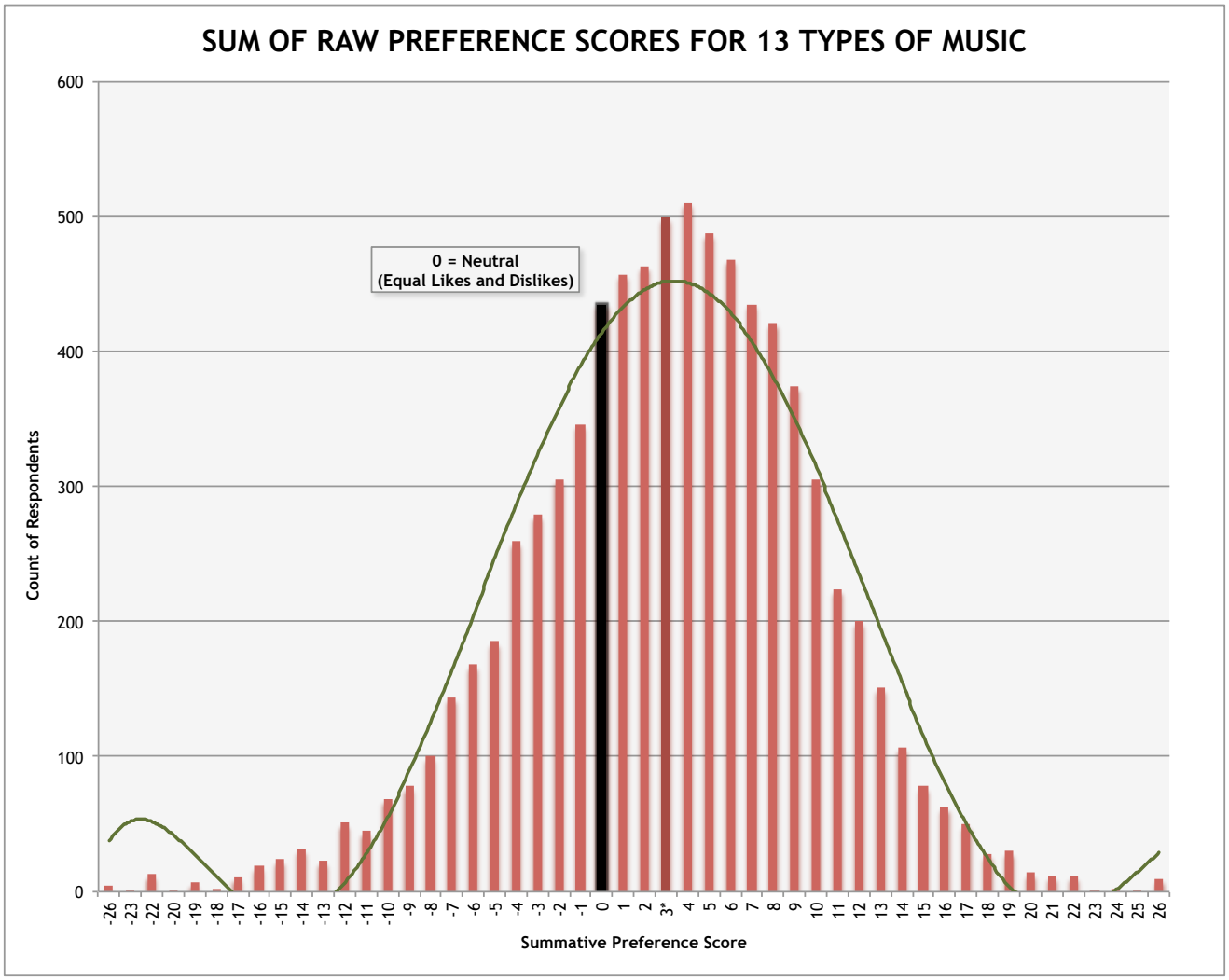
- Males are significantly more likely than females to prefer "Jazz or Blues" and "House, Trance, Electronic Dance Music," while females are much more likely than males to prefer "Broadway Musicals or Show Tunes," "Country," and "Contemporary Rock and Pop."
- All differences between males and females are statistically significant except for "Indie or Alternative Rock" and "Rap or Hip Hop."
  - "Classical music" is a bit more preferred by males, but the difference is not great. The pro-male gender gap for "classical music" is nothing like the one found for "jazz or blues."

Differences in Preference Levels, by Class Level



- Overall, "contemporary rock and pop" and "indie or alternative rock" exhibit the strongest ratings across all class levels.
- However, Seniors enjoy a wider variety of musical genres than other classes (orange triangles). This is most notable with "classic rock or oldies," "jazz or blues," "world music" and "Latin music."
- Differences are statistically significant except for: "hymns or gospel," "Broadway musicals" and "contemporary rock and pop."
  - One might infer that as students progress through school, they gain experience with music and are exposed to new and unfamiliar musical styles, thus acquiring a more diverse taste palette.

Distribution of aggregated preference scores



- Recall that genre preference scores ranged from -2 (strongly dislike) to +2 (strongly like), with 0 meaning "neutral."
- When added up across all 13 categories of music, the mean value of the aggregate genre preference scores is 3. This suggests that the number of "likes" is slightly higher than the number of "dislikes," on average.
- The smooth Bell curve suggests a normal distribution of preference – very few students like or dislike all kinds of music, and their preferences are distinguished both by what they like and by what they dislike.
- As students age, the average preference score rises slightly, but significantly, suggesting preference acquisition.
- Students who grew up in rural areas reported slightly lower preference scores, on average, compared to those who grew up in another type of area.
- Whites reported slightly lower preference scores, on average, while Hispanics reported slightly higher preference scores.

Correlations between Individual Songs and Their Corresponding Genre Preferences

CORRELATIONS BETWEEN SONG AND GENRE PREFERNCES (PEARSON CORRELATION COEFFICIENTS)	Classical	Opera	Broadway musicals/show tunes	Jazz or blues	Classic rock or oldies	Contemporary rock and pop	Rap or hip hop	Latin	Country	Hymns or Gospel	Indie or alternative rock	House trance electronic dance music	World Music
Rolling in the Deep by Adele	.046**	.088**	.193**	.050**	.037**	.160**	.061**	.095**	.102**	.113**	0	0.015	.059**
Party Rock Anthem by LMFAO	-.046**	0.004	.124**	-.088**	-.056**	.255**	.125**	.070**	.144**	.073**	-.140**	.217**	0.007
Turn Me On by DJ David Guetta featuring Nicki Minaj	-.109**	-.047**	.081**	-.155**	-.078**	.247**	.226**	.069**	.171**	0.015	-.151**	.234**	-.040**
Stronger by Kanye West	-.081**	-.076**	-.032*	-.042**	-0.024	.149**	.451**	.027*	.078**	.030*	-.051**	.135**	-.046**
Izzo HOVA by Jay Z	-0.04	-0.039	-.071**	.050*	0.027	-0.017	.456**	0.017	-0.016	0.014	-0.018	0.019	-0.014
So What by Miles Davis	.244**	.137**	-.056*	.519**	.125**	-.153**	.063**	.174**	-.109**	.107**	0.042	-0.001	.171**
Mississippi Girl by Faith Hill	-.125**	-.107**	.084**	-.144**	-0.009	.128**	0.022	-0.022	.651**	.143**	-.281**	-.089**	-.102**
Enter Sandman by Metallica	.051**	.046**	0.012	0.018	.258**	.094**	-.042**	0.026	.052**	0.013	-0.029	.032*	-0.002
Ordinary People by John Legend	.066**	.067**	.110**	.162**	.051**	.050**	.179**	.096**	0.032	.149**	0.008	-0.031	.064**
The Four Seasons by Antonio Vivaldi	.574**	.310**	.132**	.167**	.094**	-0.002	-.052**	.153**	-0.02	.166**	-0.01	0.029	.220**
The Rite of Spring by Igor Stravinsky	.466**	.327**	.112**	.208**	.103**	-.045*	-.063**	.153**	0.019	.153**	0	0.027	.234**
Tu Mirada by Reik	0.068	0.031	.172**	-0.098	-0.08	0.041	.106*	.402**	-0.007	0.046	-0.058	0.083	.130*
The Look of Love by Diana Krall	.205**	.181**	.118**	.380**	.132**	-0.022	-0.06	.217**	.087*	.168**	-0.02	0.023	.199**
Skinny Love by Bon Iver	0.021	-0.005	0.032	.053**	.044*	-0.008	.040*	-0.035	-0.025	-0.02	.266**	0.011	-0.006
Howlin for You by Black Keys	.064**	.053**	0.003	.136**	.185**	.047**	0.013	0.026	-.073**	-0.02	.274**	.039*	.038*
Come Together by The Beatles	.073**	.066**	.092**	.168**	.360**	.048**	0.024	.072**	-.039**	0.024	.197**	-0.001	.067**
Symphony No 6 I Allegro Ma Non Troppo	.616**	.360**	.154**	.219**	.088**	-.037*	-.064**	.150**	-.045**	.168**	0.023	0.01	.228**

**Correlation is significant at the 0.01 level (2-tailed).

*Correlation is significant at the 0.05 level (2-tailed).

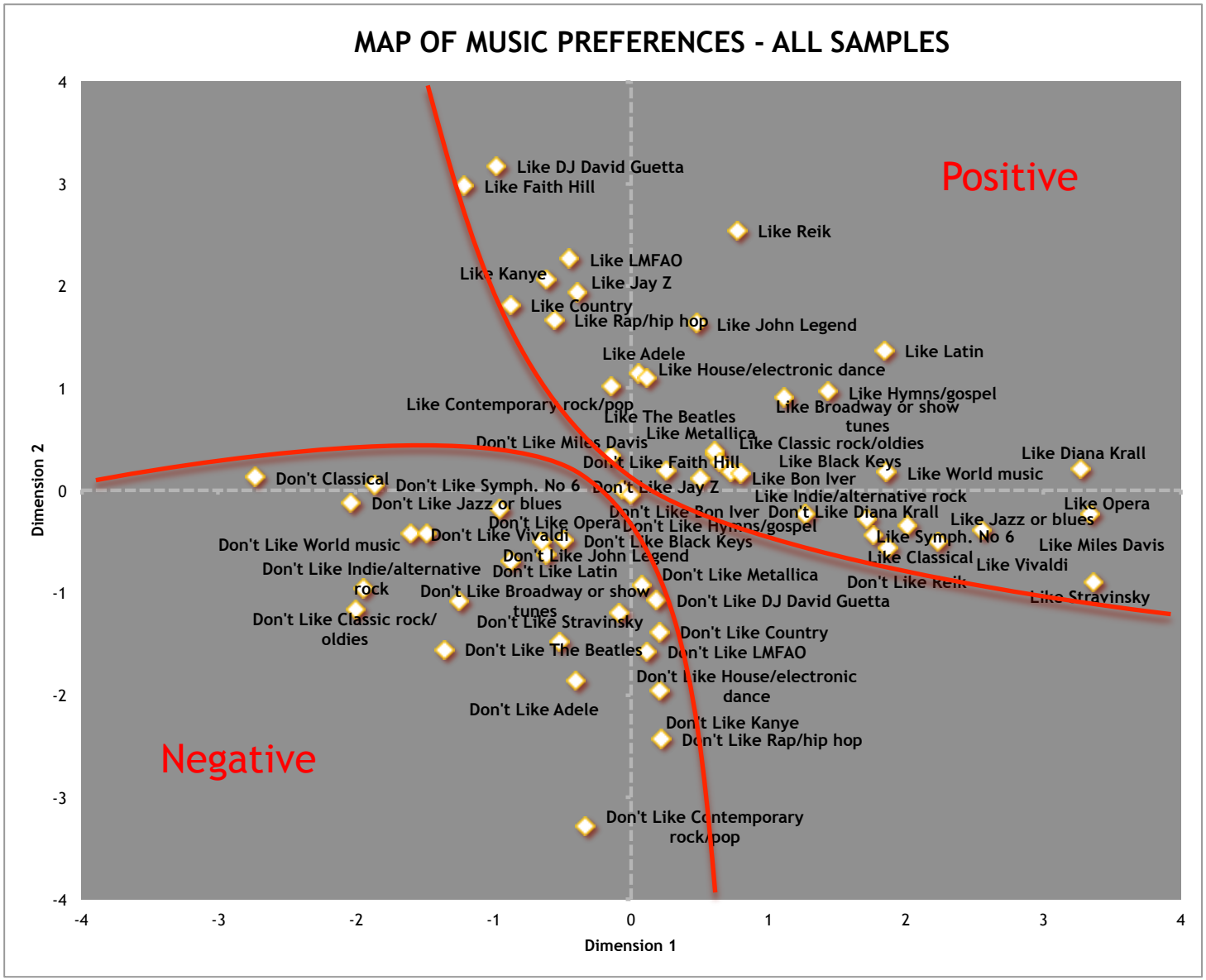
- The purpose of asking both genre and song-specific preferences was to establish a more nuanced picture of music preference. WolfBrown's previous research on jazz preferences suggests that taste is primarily constructed in reference to specific artists, rather than categories. Thus, an important research question is the extent to which genre preferences are a useful proxy for actual tastes.
- The table at left reports correlations between song preferences and genre preferences. The dark green cells highlight stronger associations between variables (significant at the .01 level), whereas the light green identify relatively weaker, but still significant associations (significant at the .05 level).
- Note especially the correlations between songs and their corresponding genre. For example, the highest correlation coefficient in the entire matrix is between Faith Hill's *Mississippi Girl* and the genre "country" at .651, suggesting strong alignment. Note the similarly high correlation between Beethoven's *Symphony No. 6* and "classical music" (. 616).
- Other correlations are not as strong.
- The key take away here is that some songs correlate well to one genre (e.g., all classical music selections, and Miles Davis), whereas others are associated with multiple genres, which was not expected. For example, Although DJ David Guetta was included in the list to represent house/trance/electronic dance music, the correlation is only mildly strong, and less so than contemporary rock and pop.
- Asking about preferences for unique songs is a useful way to examine preferences because it recognizes taste diversity. Results suggest that genre preferences are a flawed, but still useful, reflection of music tastes.

Exploratory Factor Analysis of Preference Variables

EXPLORATORY FACTOR ANALYSIS OF 27 PREFERENCE VARIABLES - AGGREGATED SAMPLES	Traditional Music (n=8217)	Dance Music (n=4866)	Classical Music (n=1352)	Classic Rock (n=6253)	Country Music (2022)	Hip Hop/Rap (n=2161)	Indie Rock and Soul (n=1061)	Jazz (n=325)
Q22M World Music	**0.73**				-0.15			
Q22H Latin	**0.71**	0.16						0.10
Q22B Opera	**0.65**		0.34			-0.12		
Q22D Jazz or blues	**0.59**	-0.21		0.27				0.25
Q22A Classical	**0.59**		0.49		-0.14	-0.12		
Q22J Hymns or Gospel	**0.56**				0.43		0.12	
Q5 Party Rock Anthem by LMFAO		**0.71**			0.13			
Q6 Turn Me On by DJ David Guetta featuring Nicki Minaj		**0.69**			0.11	0.13		
Q22L House trance electronic dance music	0.13	**0.54**			-0.39	0.17	-0.13	
Q22F Contemporary rock and pop		**0.52**		0.31	0.20			-0.26
Q13 The Four Seasons by Antonio Vivaldi			**0.73**					
Q20 Symphony No 6 I Allegro Ma Non Troppo	0.19		**0.73**					
Q14 The Rite of Spring by Igor Stravinsky			**0.61**					0.12
Q22E Classic rock or oldies	0.17			**0.75**	0.17		-0.10	
Q19 Come Together by The Beatles			0.13	**0.62**		0.12	0.17	
Q22K Indie or alternative rock	0.12			**0.60**	-0.36			
Q22I Country		0.16			**0.74**			
Q10 Mississippi Girl by Faith Hill					**0.61**			0.15
Q22G Rap or hip hop		0.22	-0.12			**0.72**		
Q7 Stronger by Kanye West		0.29				**0.67**		
Q8 Izzo HOVA by Jay Z		-0.13				**0.63**		
Q17 Skinny Love by Bon Iver					-0.12		**0.73**	
Q4 Rolling in the Deep by Adele	0.15	0.31			0.18		**0.52**	
Q18 Howlin for You by Black Keys				0.34	-0.13		**0.43**	0.12
Q12 Ordinary People by John Legend	0.11				0.17	0.29	**0.33**	0.24
Q16 The Look of Love by Diana Krall		0.12				-0.13	0.12	**0.73**
Q9 So What by Miles Davis	0.13	-0.11	0.12			0.19		**0.59**

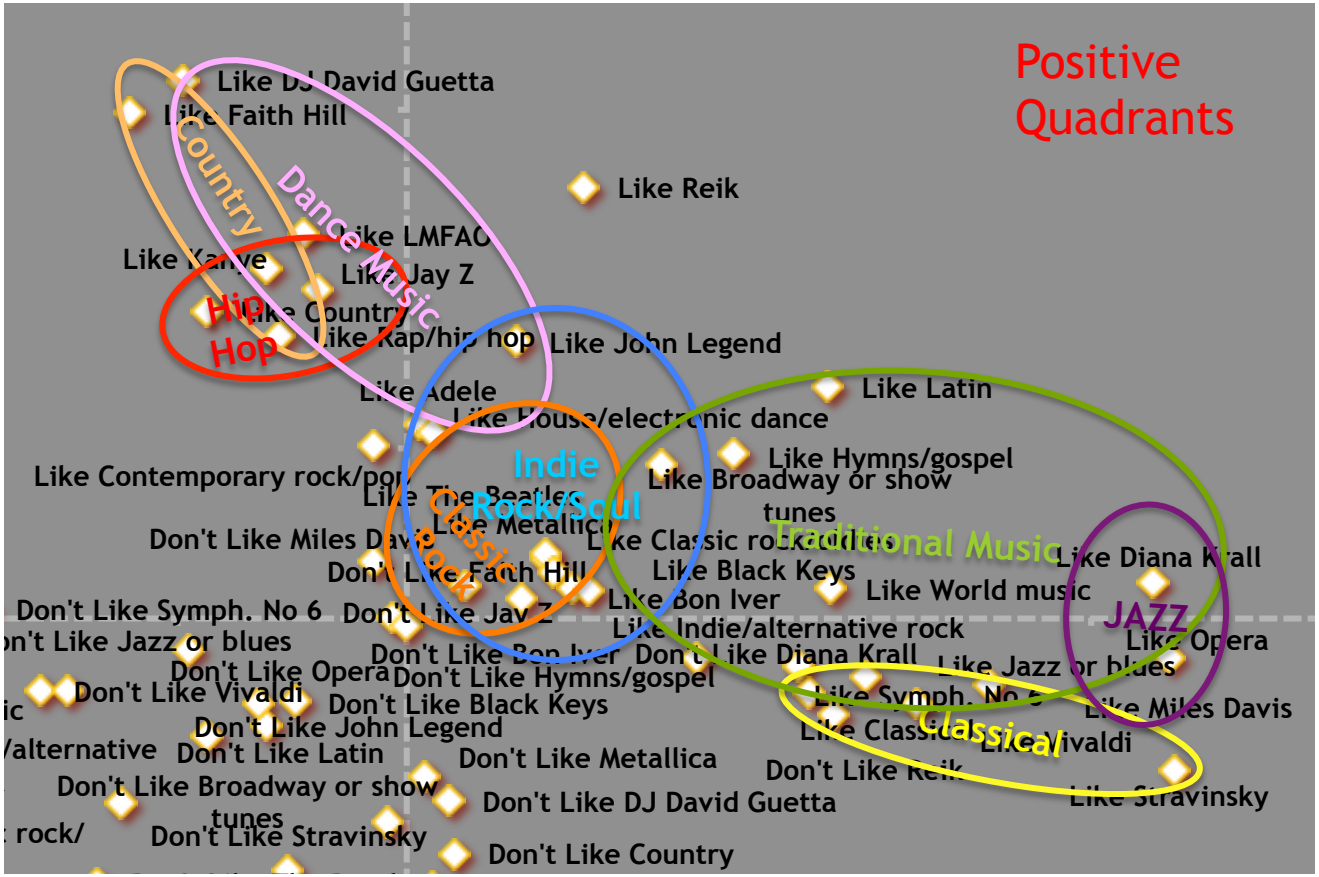
- Exploratory factor analysis, a data reduction technique, was employed to look for underlying dimensions across 27 different variables measuring musical preference.
  - The "n's" in the column headings represent the number of respondents who could be scored on each factor. Since many respondents didn't answer the individual song preference questions (i.e., because they'd never heard the song before), the number of respondents who could be scored on each factor varies a great deal.
  - The numbers displayed in the body of the chart are factor loading scores. Factor loadings are the weights and correlations between each variable and the overall factor. Higher loads indicate higher levels of association with the factor. A negative value indicates an inverse association with the factor.
- Note that the factors are not mutually exclusive, and the same variable can load on multiple factors, either positively or negatively.
- Results indicate eight factors or dimensions, as illustrated in the table at left:
  - Traditional Music (the items in this factor are genres, not individual songs)
  - Dance / Contemporary
  - Classical
  - Classic Rock
  - Country
  - Hip Hop/Rap
  - Indie Rock and Soul
  - Jazz
- Several unhelpful items were left out of the analysis, including "Broadway Musicals," *Enter Sandman*, by Metallica" and *Tu Mirada*, by Reik. These items loaded on too many factors, or none at all, or were rated by too few respondents.
  - It is noteworthy that two preference factors involving classical music were defined, one revolving around the three individual classical pieces, and another defined around a "basket" of genre preferences, including world music and jazz or blues.

Mapping Music Preferences using Multiple Correspondence Analysis



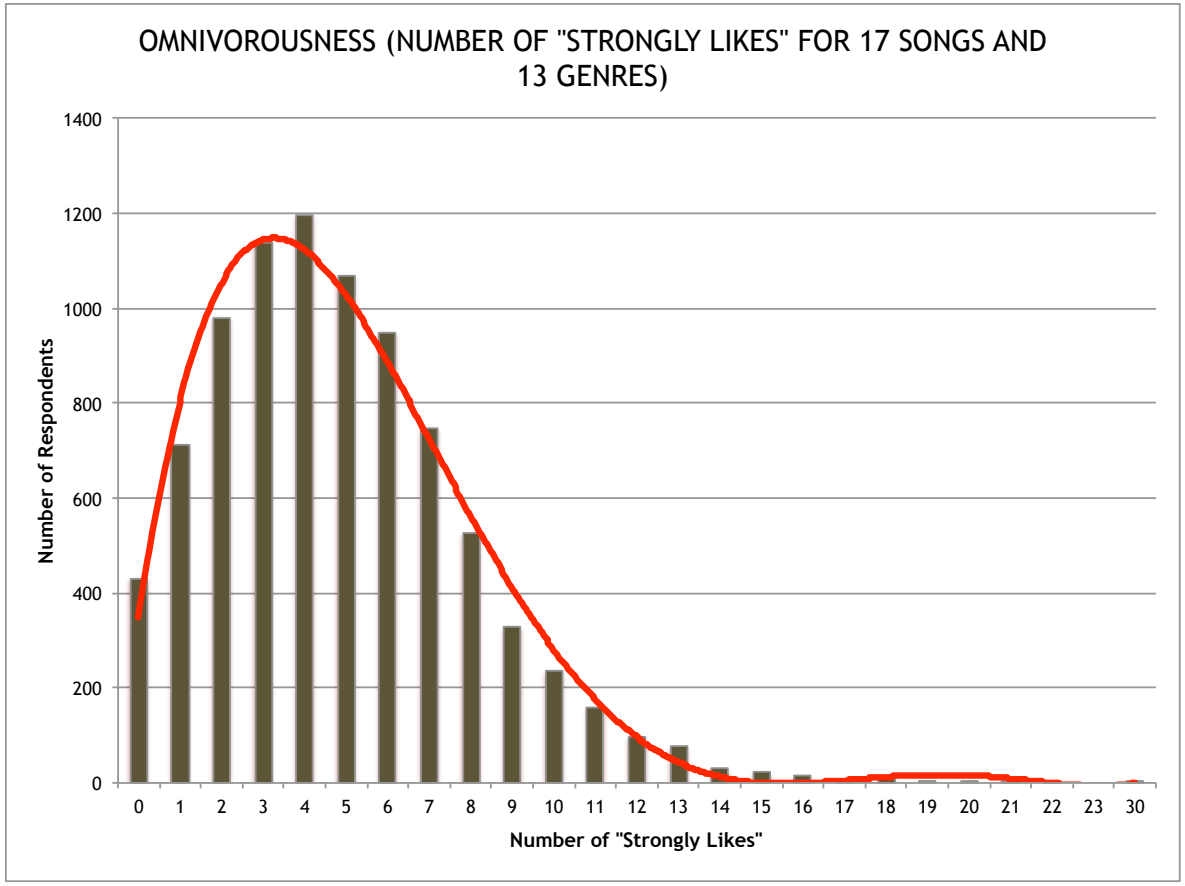
- A further analysis of music preferences was conducted using a statistical technique called multiple correspondence analysis. This type of analysis plots variables based on their relative distance from another (via distribution of response), and allows the research to infer meaning from the X and Y axes.
- The chart at left provides a map of preference variables, including both song and genre preferences.
- The X-axis (Dimension 1) appears to connote a continuum of preference in regards to classical music and other traditional music genres (jazz or blues, Broadway, etc.), whereas the vertical Y-axis (Dimension 2) describes preference for Contemporary Rock and Pop, Dance/Contemp., Country and Rap/Hip Hop.
- One might also interpret the four quadrants, which distinguish results by positive and negative preference (demarcated by the red curves).
  - In general, this analysis suggests that students' tastes in music are defined both by what they dislike and by what they like, and that two key dimensions of taste are the extent to which they like or dislike traditional forms of music, and the extent to which they like or dislike contemporary forms of music.

Mapping Music Preferences – Multiple Correspondence Analysis



- Focusing in on the area of the preference map associated with positive music preferences, one can see a number of groupings of individual variables following the general dimensions described by the factor analysis.
- Note the far right-hand placement of jazz, suggesting its position at the margin of the traditional music spectrum.
- Note the proximity of "classic rock" to the middle of the axes (i.e., "middle of the road")

Exploring Omnivorousness



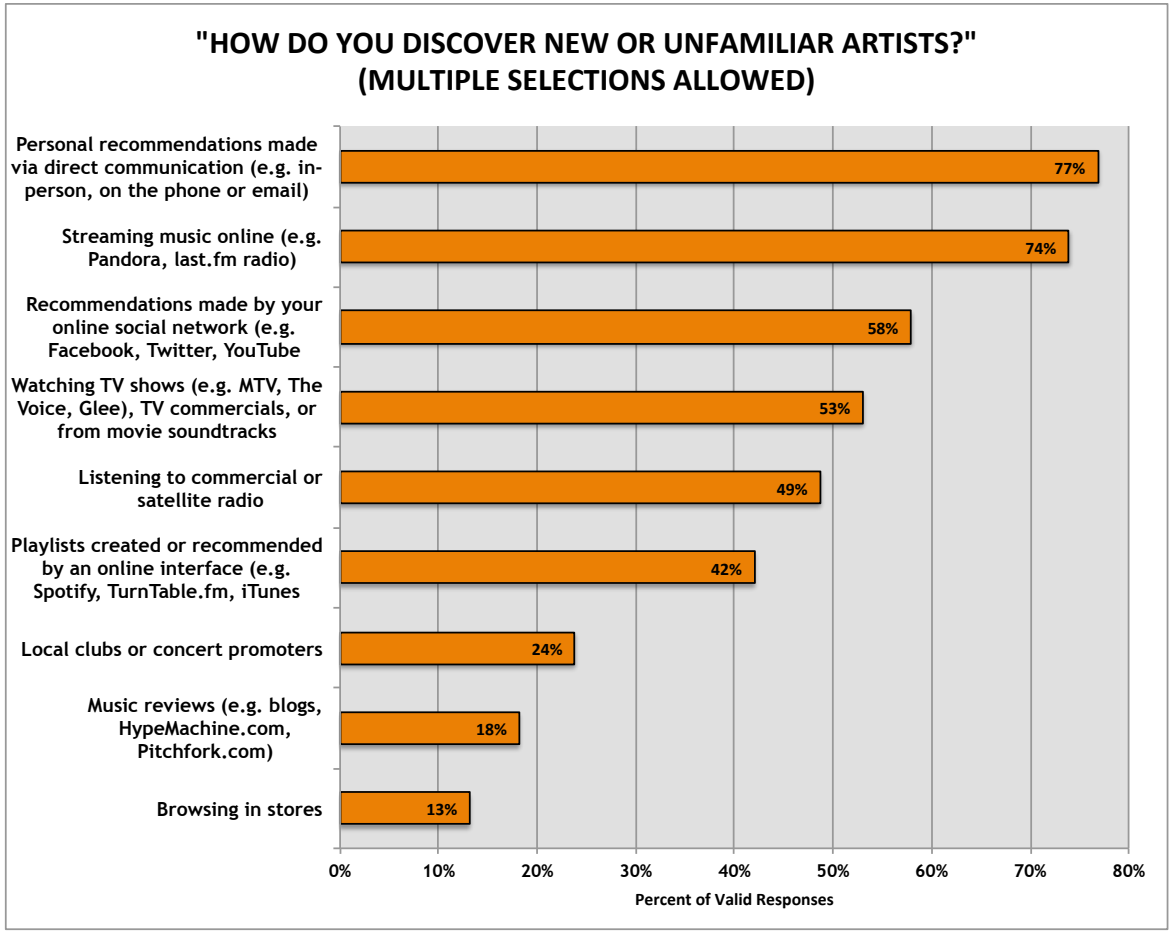
- There is an abundance of anecdotal evidence that younger adults are consuming a wider array of music, driven by the availability of inexpensive music online. This was a theme of the focus groups, and has been a consistent finding in our other research.
  - The fragmentation and diversification of cultural tastes is one of the key trends re-shaping demand for cultural experiences of all sorts.
- A composite indicator of omnivorousness was created to reflect the number of "strongly like" answers to the list of 17 individual songs and 13 genres of music. The chart at left illustrates the raw distribution of ominvorousness scores.
- The average respondent "strongly likes" a total of 4.8 of the 30 songs and genres. The distribution is one of a normal curve with a smooth tail on the high end – where the real omnivores reside.
- With respect to demographics:
  - Females are significantly more likely than males to be omnivorous in their musical tastes. Hispanic respondents reported significantly higher omnivorousness, while Asian and Asian American respondents reported relatively lower omnivorousness.
  - Students who grew up in urban areas reported significantly lower omnivorousness than those who grew up in other types of areas.
  - Omnivorousness increases slowly but significantly with class level, with the largest jump between Juniors and Seniors.
  - Of course, omnivorousness is highly correlated with high school arts activity, and is significantly higher for arts majors.
- All told, these demographic factors explain about 5% of the variance in omnivorousness.

Preference Discovery

Background on Preference Discovery

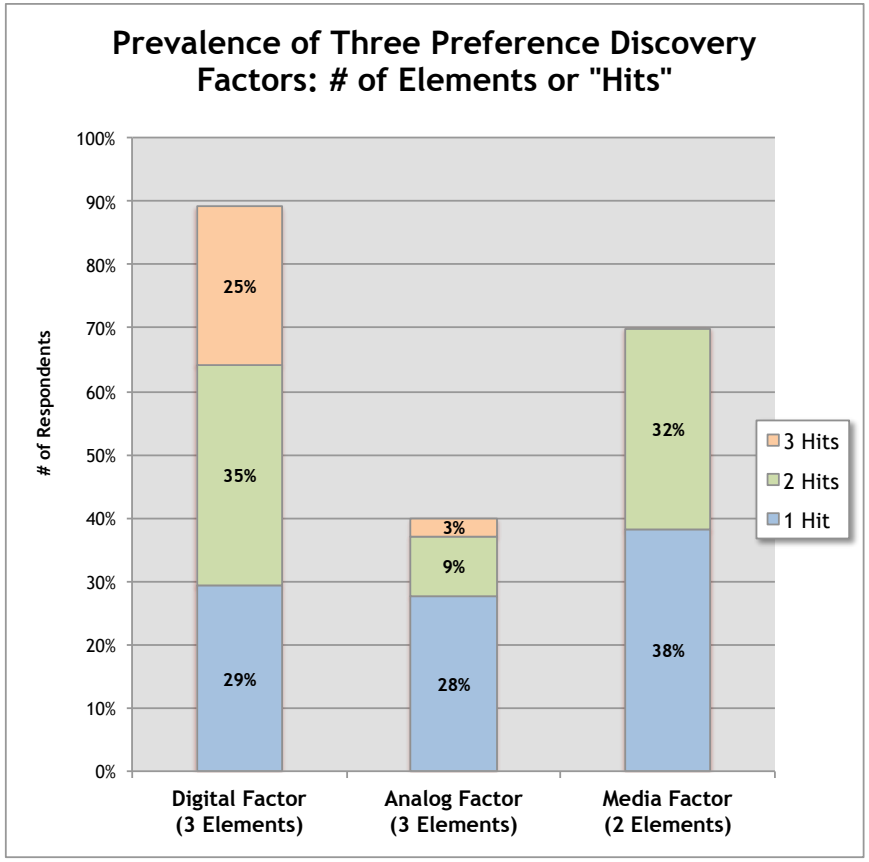
- "Preference discovery" is a term most closely associated with software programming in the commercial sector, typically used to suggest products to shoppers in an online setting.
- A modern version of the helpful sales representative, the software algorithms behind Amazon, iTunes Genius, Netflix, Pandora, and other online retailers suggest products a consumer might want based on past consumption patterns. These algorithms drive billions of dollars of commerce.
- There is an insidious self-referentialism inherent in these technologies, however, which runs counter to the goal of aesthetic expansion.
- Based on other research in the arts, we can see several preference discovery strategies in use today by arts organizations:
  1) Self-guided discovery, often aided by technology (e.g., browsing YouTube to view videos or audio files of an upcoming artist or production);
  2) Socially-based discovery (e.g., recommendation from a friend, family member, or sales agent – as when a ticket seller suggests a performance that the customer did not ask for);
  3) Curated discovery, through programming offered by arts providers (e.g., programming a challenging work between two more accessible works); and
  4) Media-based discovery (e.g., seeing a new style of dance on television, or hearing unfamiliar music on the radio).
- Much remains to be learned about preference discovery and how and why people "acquire" taste, and what motivates them to try something new.
- The first strategy, self-guided discovery, is not really an intervention, since it is up to the consumer to make the effort to discover. New tools can be provided, however, such as when a presenter provides audio or video samples on a website.
- The third strategy, curated discovery, is what arts groups do on a regular basis for existing audiences. This is not limited to programming challenging repertoire for dedicated audiences, but also encompasses programming accessible work for new audiences (e.g., free and ticketed performances designed for newcomers).
- The fourth modality, media-based discovery, is generally beyond the scope of a nonprofit arts group to influence, although one can easily hypothesize a preference discovery relationship between orchestras and their local classical music radio stations. On which media do contemporary dance and theatre presenters rely to expose current and potential audiences to unfamiliar artists and forms? That's a little bit scary to think about.
- This leaves us with the second modality, socially-based discovery. In fact, a growing body of market research suggests that taste is most effectively transmitted socially. When you share art with friends and family members, you are transmitting not only the art, but a social imprimatur – a social validation of taste. Peer-based recommendations carry a lot of weight: "If you like me, you'll love my music." (It helps if you're not the parent of the person whose musical tastes you're trying to change.) An invitation from a friend can circumvent a vast array of barriers to participation.
- Social validation of taste is increasingly apparent online in the form of highly fluid "taste communities" that coalesce around all sorts of artists and ideas.

How do you discover new or unfamiliar music artists?

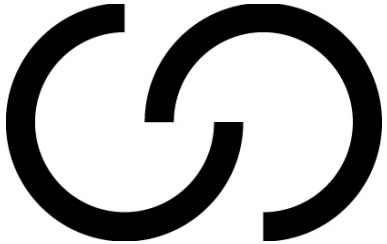


- To explore avenues of preference discovery, students were provided a list of nine sources of information about new or unfamiliar music artists, and asked to indicate which they use.
- Results point to three tiers of sources of information about new or unfamiliar music artists. The two sources at the top tier include personal recommendations (77%) and streaming music online (74%).
  - The high figure for personal recommendations is not surprising, but the figure for online streaming signifies a sea change in preference discovery through online channels. This is consistent with focus group results indicating a high levels of use of online music services such as Spotify, Pandora, etc.
- As might be expected, social media is also a channel of preference discovery (58%), as well as preference discovery via television and movie soundtracks (53%).
- Specifically, 42% cited "playlists created or recommended by on an online interface (e.g., Spotify, TurnTable.fm, iTunes Genius)" as a source of information about new artists, illustrating the power of technology-driven preference discovery.
- The next page explores natural groupings of preference discovery methods.

How do you discover new or unfamiliar music artists?

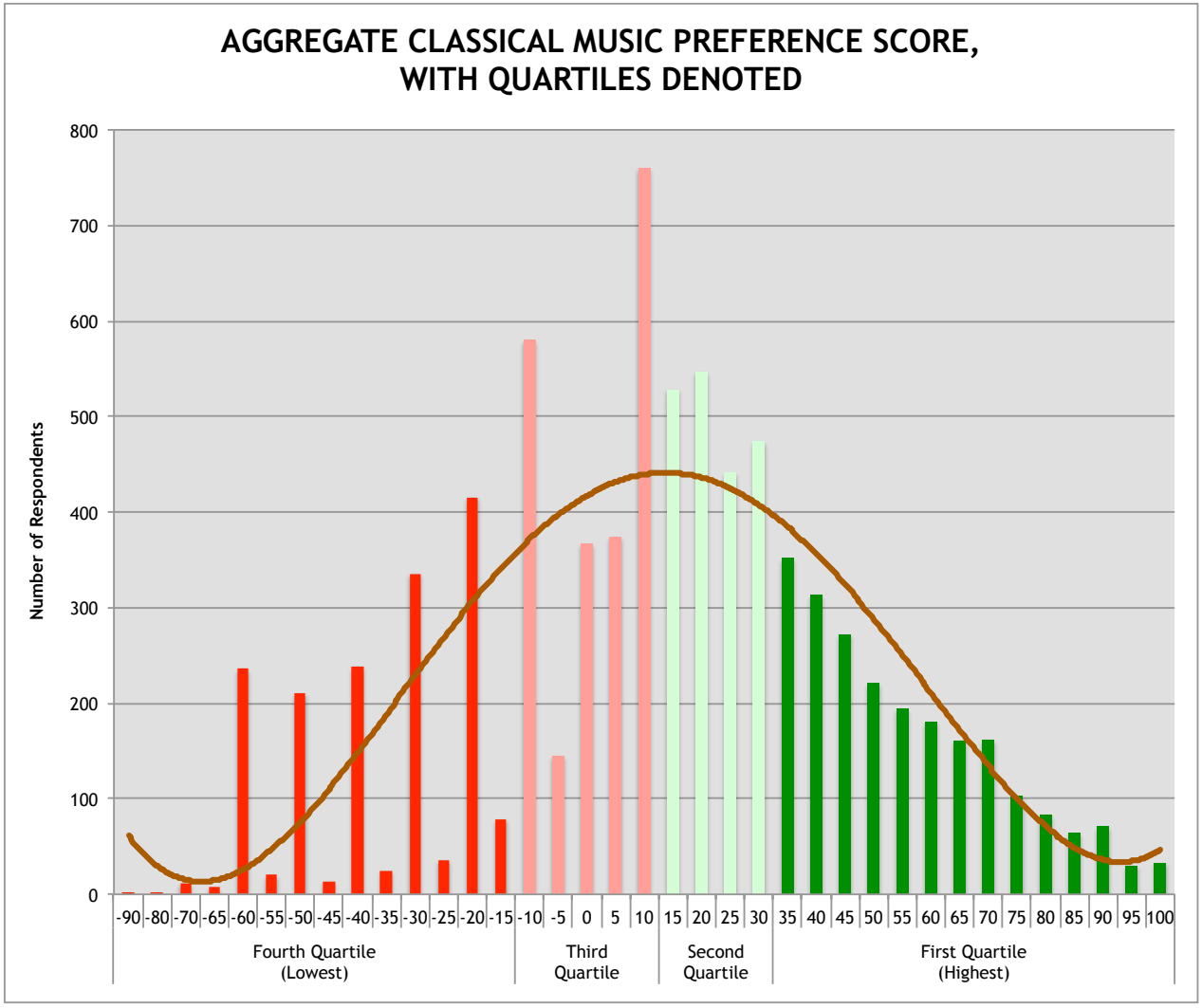


- An exploratory factor analysis was run to see if there are natural groupings of preference discovery sources. The analysis reveals three strong factors or dimensions of preference discovery: 1) a factor that includes three technology-aided discovery methods (i.e., a "digital" factor, including streaming audio, social media, and playlists); 2) a factor that revolves around browsing stores, local clubs, and reading music reviews (i.e., an "analog" factor); and 3) a factor that revolves around radio and television (i.e., a "media" factor).
- The chart at left illustrates how many students associate with each of the three factors, and to what degree.
  - The most prevalent factor is the digital one. A quarter of all students cited all three of the elements associated with this factor.
  - The second most prevalent factor is the media one. A third of all students cited both of the elements associated with this factor, illustrating the power of the media to influence cultural tastes.
  - The least prevalent factor is the analog one. Only 12% of students cited more than one of the three elements associated with this factor.
- As might be expected, age is inversely correlated with the digital factor, and positively correlated with the analog factor.
  - Which of these preference discovery factors can arts groups use to raise awareness of classical music and to cultivate interest in visiting artists?
  - Results clearly suggest that presenters will reach more students through online initiatives using some mixture of playlists, social media and streaming audio.



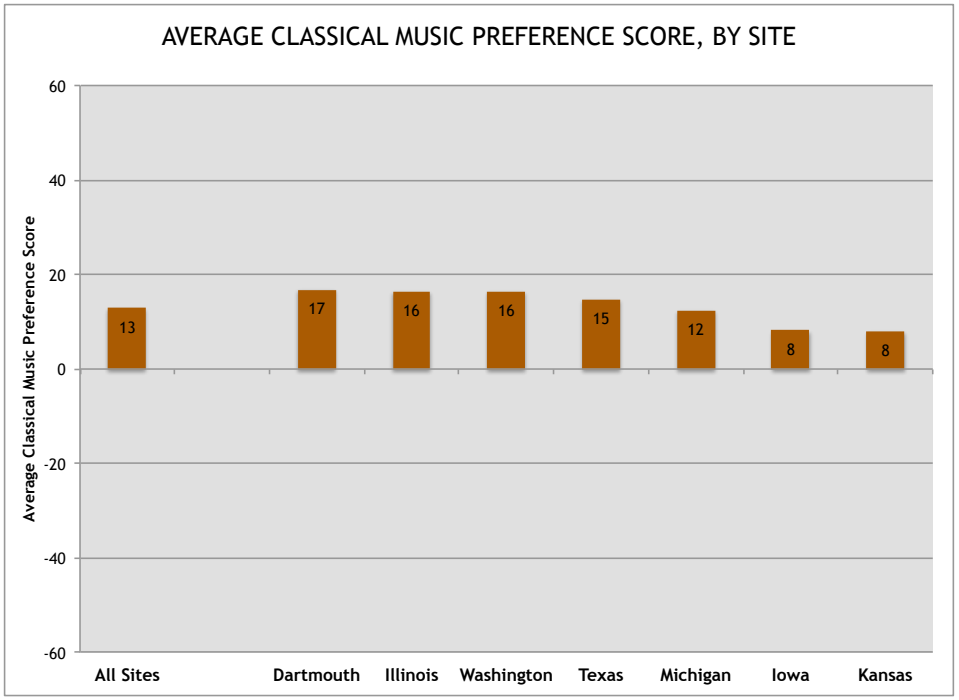
Relationship with Classical Music

Calculation of an Aggregate Indicator of Preference for Classical Music

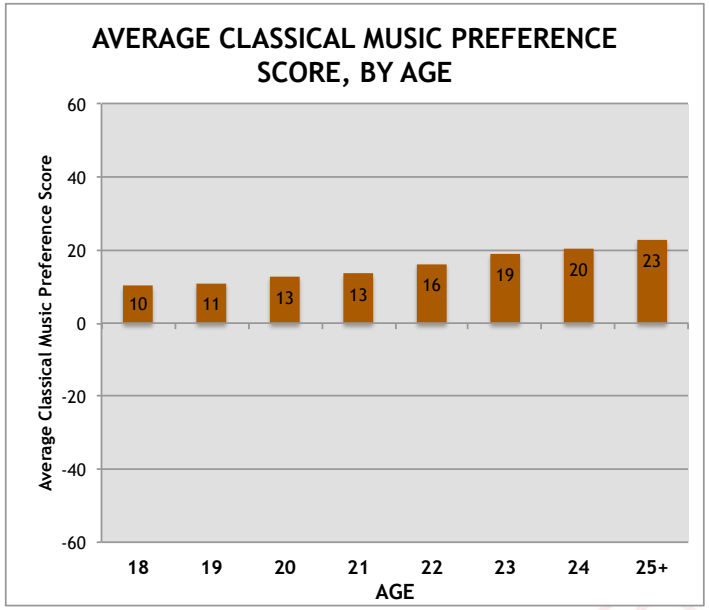


- To aid in analysis, a composite indicator of preference level for classical music was calculated.
  - All respondents were assumed to have neutral preference as a starting point.
- The scoring algorithm has 26 individual components, drawn from eight survey questions.
- For example, if respondents indicated they "strongly dislike" Vivaldi's *The Four Seasons*, 10 points were subtracted from their classical music preference score, while 5 points were subtracted for those who said the "somewhat dislike" *The Four Seasons*.
- Similarly, if respondents said they are "not at all" interested in learning more about classical music, 10 points were subtracted from their overall score, whereas 10 points were added if they said the were "extremely" interested in learning more.
- The chart at left illustrates the raw distribution of preference scores based on the algorithm, with quartiles denoted through coloration. The overall distribution follows a normal Bell curve.
- Throughout the remainder of this report, this score is used to examine relationships between different variables and students' preference levels for classical music.

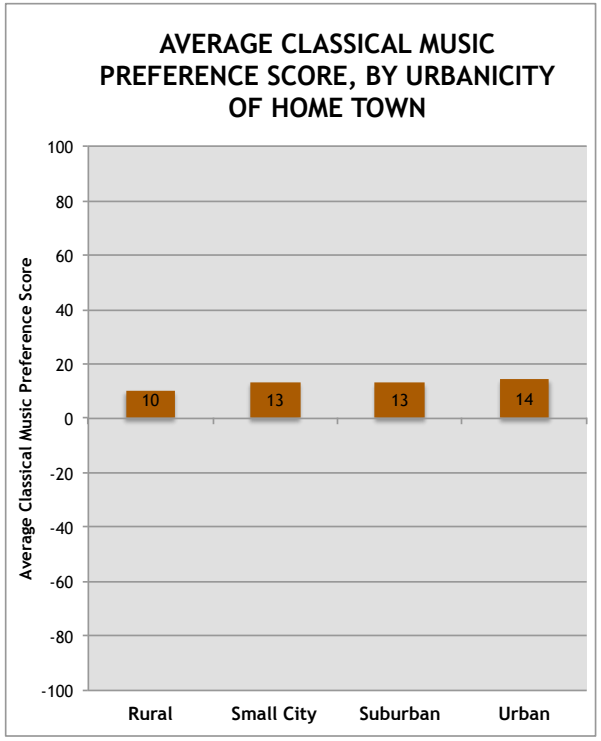
Demographic and Other Factors Associated with Classical Music Preference Levels

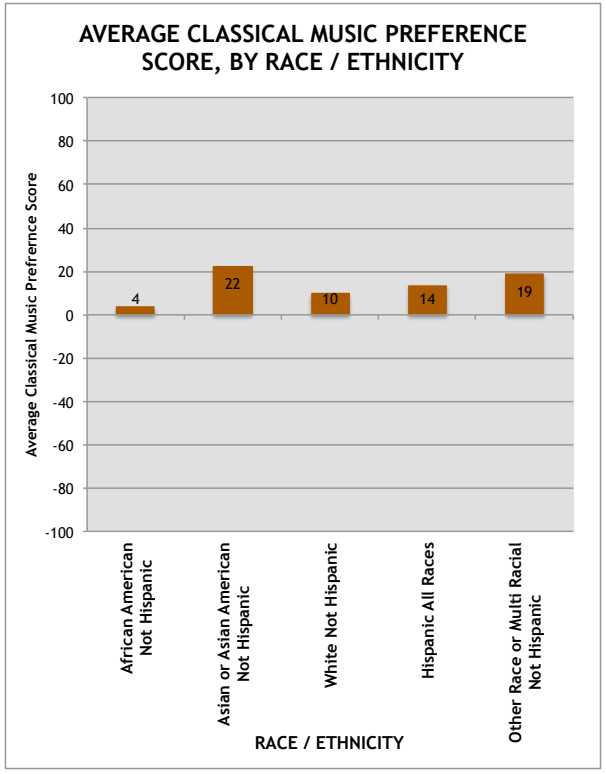


- The average classical music preference score across all seven sites is 13 (i.e., somewhat above the neutral point on the scale).
- Across the seven sites, there is not much variation, ranging from a high of 17 (Dartmouth) to a low of 8 (Iowa and Kansas).
- Investigation of the demographic factors associated with classical music preference reveal a few subtle patterns.
- For example, average preference scores for classical music rise consistently with age (chart below), from a low of 10 for students age 18 to a high of 23 for students age 25+.
  - It makes sense that students are exposed to more kinds of music as they age, and their preferences expand.
- However, having attended at least one classical music concert since being at college is far more predictive of preference levels (average scores of 28 for those who have been to a classical concert vs. a score of 9 for those who haven't).



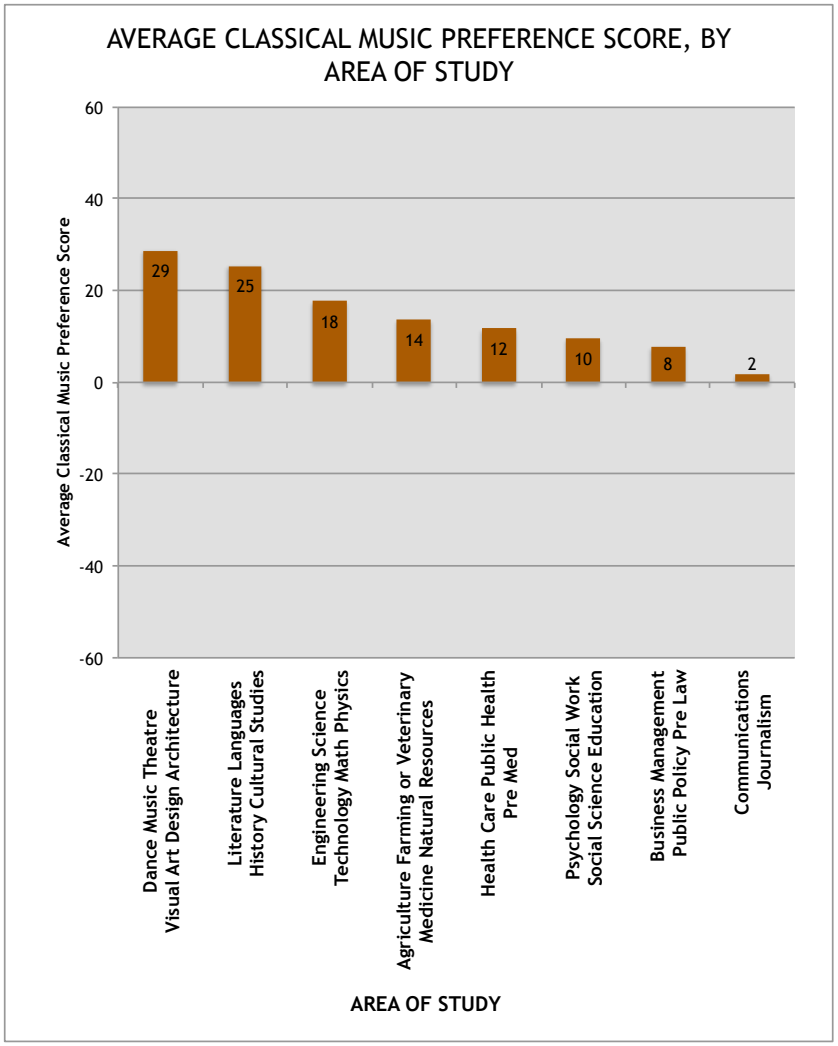
Demographic and Other Factors Associated with Classical Music Preference Levels





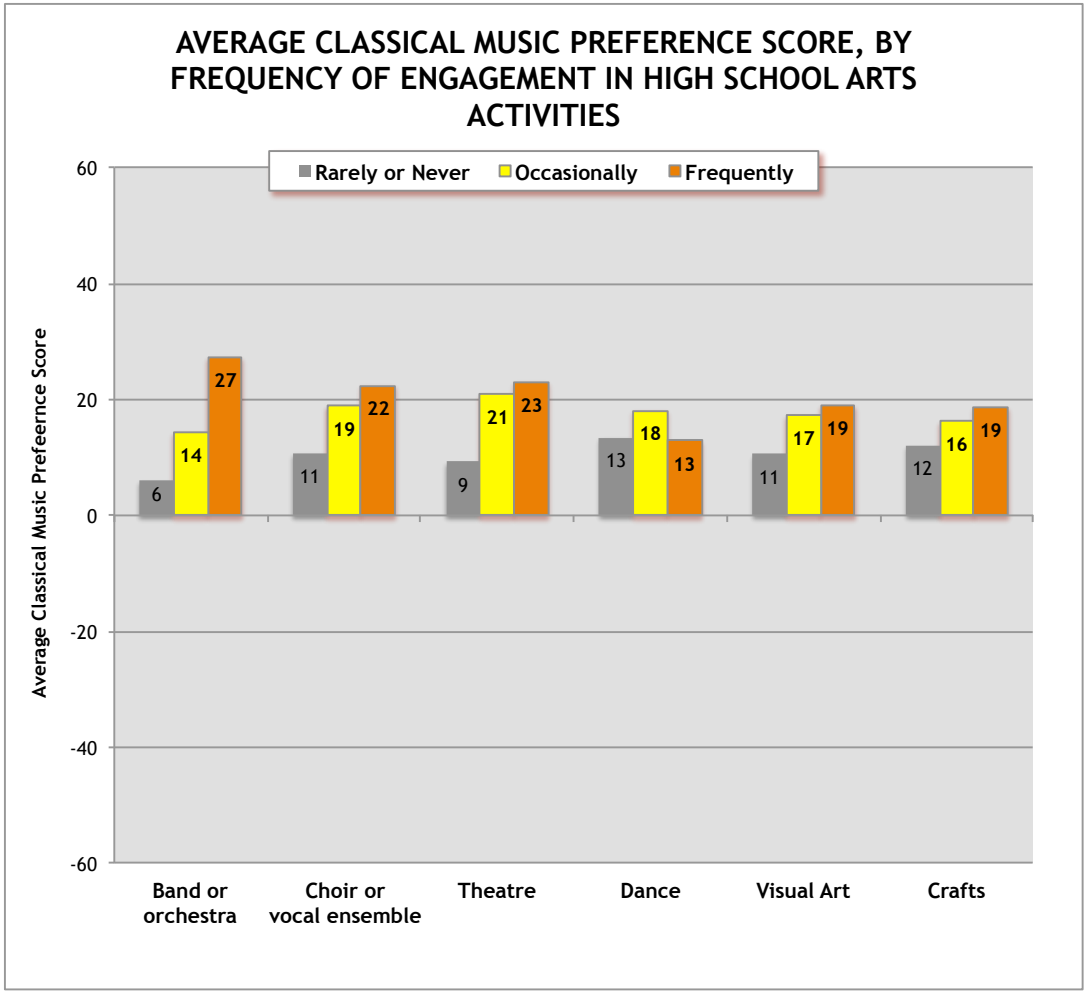
- Students who grew up in urban areas are slightly more likely than students who grew up in rural areas to have higher classical music preference scores (14 vs. 10, respectively. These differences are marginally significant.
- With respect to race/ethnicity, students who identified as Asian or Asian American (Not Hispanic) were found to have the highest preference levels for classical music (22).
- Hispanic students, on average, reported higher classical music preferences than White (Not Hispanic) students (14 vs. 10, respectively). These differences are statistically significant and moderately predictive.
- Among non-arts majors, males reported slightly higher levels of preference for classical music than females, although the different is not statistically significant (not shown).

Classical Music Preference Levels, by Area of Study



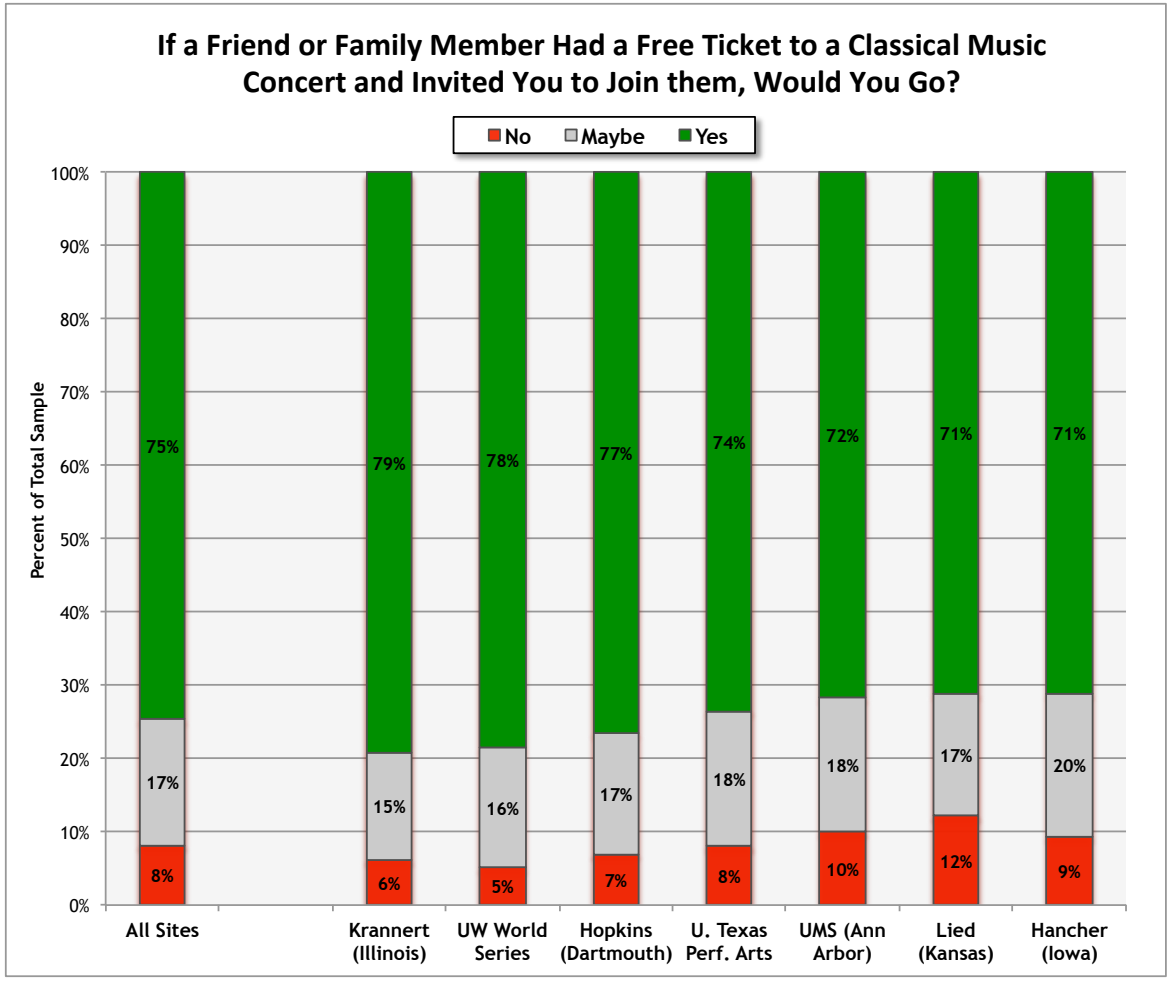
- Where, on campus, are presenters most likely to find students with a positive attitude about classical music?
- Analysis of preference scores versus students' area of study reveals that literature, languages, history and cultural studies students are most likely of all non-arts majors to have a positive preference for classical music (25), followed by engineering, science and technology and math or physics majors (18). At the low end of the spectrum, communications and journalism students are least likely to enjoy classical music (2).
- Within the individual arts disciplines (not shown), music majors reported an average classical music score of 55, followed by dance majors, who reported an average score of 32, and theatre majors, who reported an average score of 23, which is actually below the average score for science and technology majors, and only slightly above the average score for math or physics majors.
  - Presenters may wish to bear these results in mind as they consider where, on campus, to look for academic partnerships.

Classical Music Preference Levels, by High School Arts Involvement



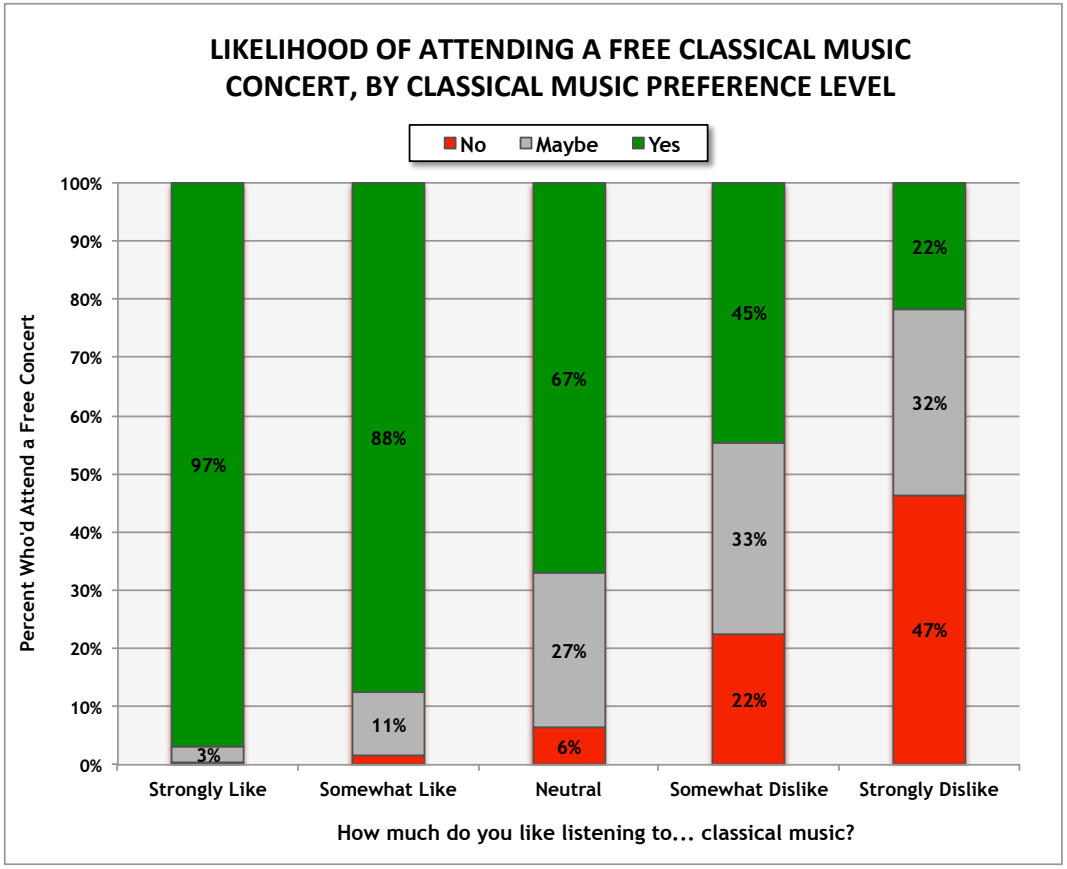
- Regression analysis suggests that the strongest predictor of classical music preference, by a long shot, is high school arts activity in band/orchestra, choir/vocal ensemble, or theatre. These three variables, alone, explain 9% of the variance in the classical music preference score.
  - Given the strong association, community partnerships with high school music programs are strongly indicated as a long-term investment in audience development.

Establishing a Minimum Threshold of Interest in Attending Live Classical Concerts



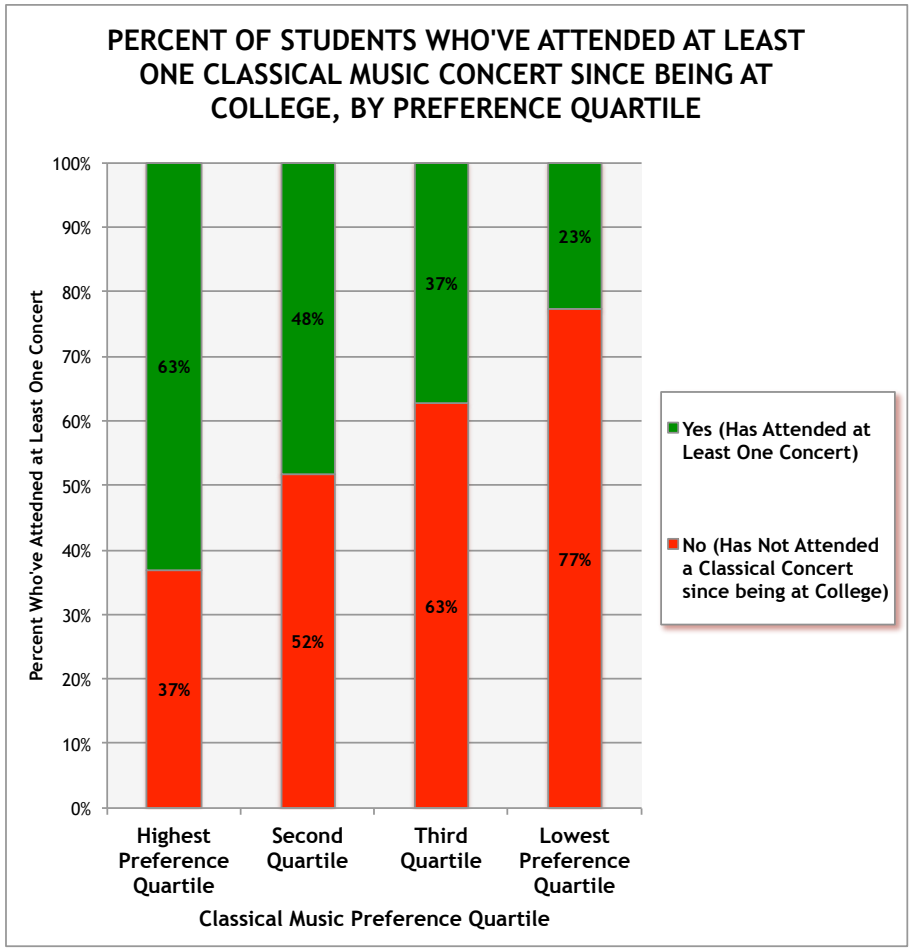
- By and large, the students who responded to the survey are open to attending a classical music concert, under the right conditions. On average, three-quarters would accompany a friend or family member to a classical music concert if the ticket was free.
  - If anything, this underscores the power of social context to circumvent other barriers, especially when the cost barrier is removed.
- Results do not vary much across the seven campuses, with Univ. of Illinois students reporting the highest proclivity (79%), and Kansas and Iowa students reporting the lowest proclivity (71%).
- Very few students indicated with certainty that they would not attend (8%, on average).
- Its impossible to know how much students' attitudes about classical music have changed over the past decades. What seems clear is that a large majority of students are at least open to classical music.

Preference for Classical Music vs. Likelihood of Attendance at a (free) Live Concert



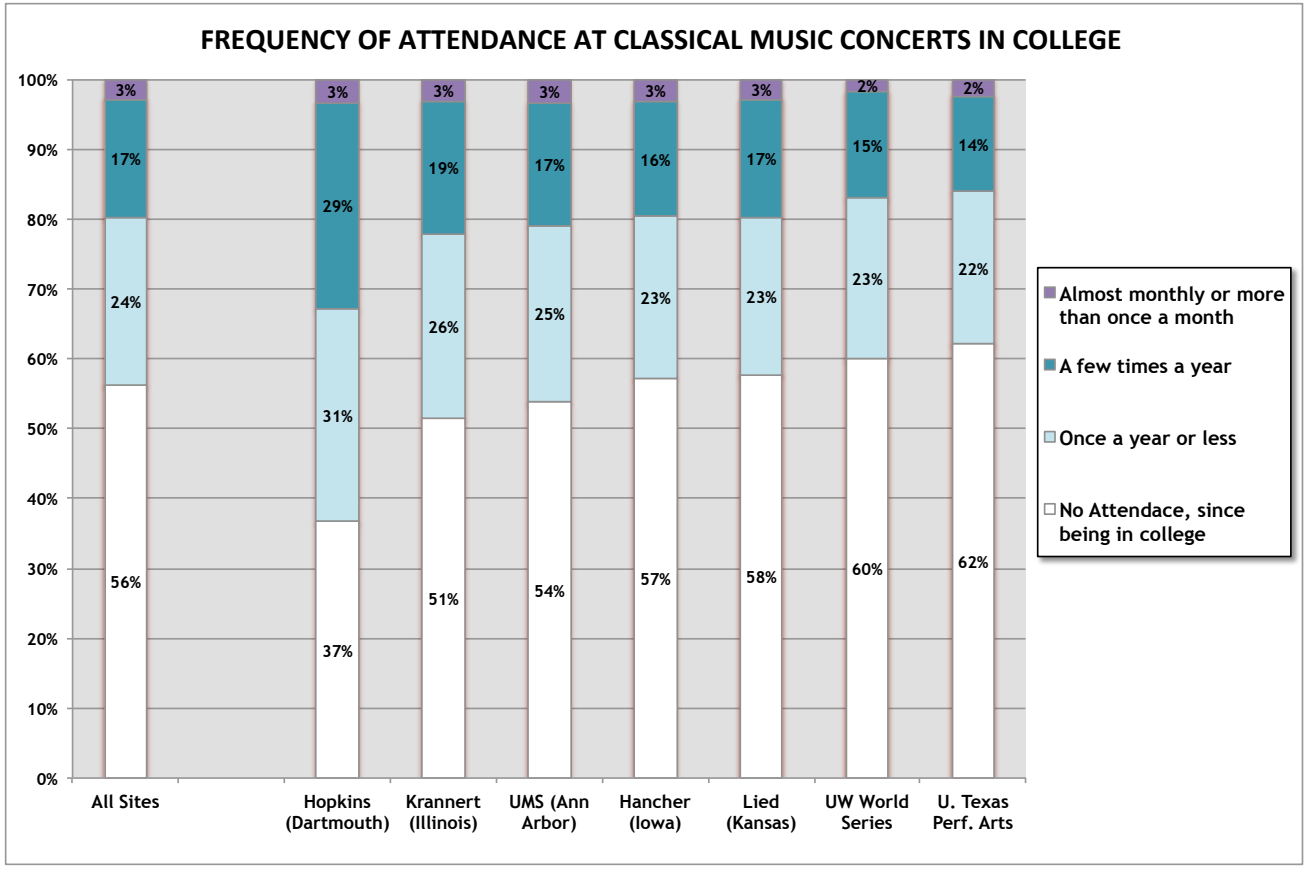
- How closely does preference for classical music as a category track with likelihood of attending a live concert? For example, are there people who say they wouldn't go to a live concert, who like classical music? Conversely, are there people who'd go to a concert who dislike classical music?
- Based on the graph at left, 22% of students who "strong dislike" classical music would go to a free concert with a friend or family member. The figure doubles to 45% for students who only "somewhat dislike" classical music.
- Two thirds of students who are "neutral" about classical music would try a live concert, under the right conditions. In general, it seems possible to expose a large proportion of the student population to classical music under the right conditions, even some of those those who dislike classical music.

Incidence of Attendance at a Classical Concert Since Being at College



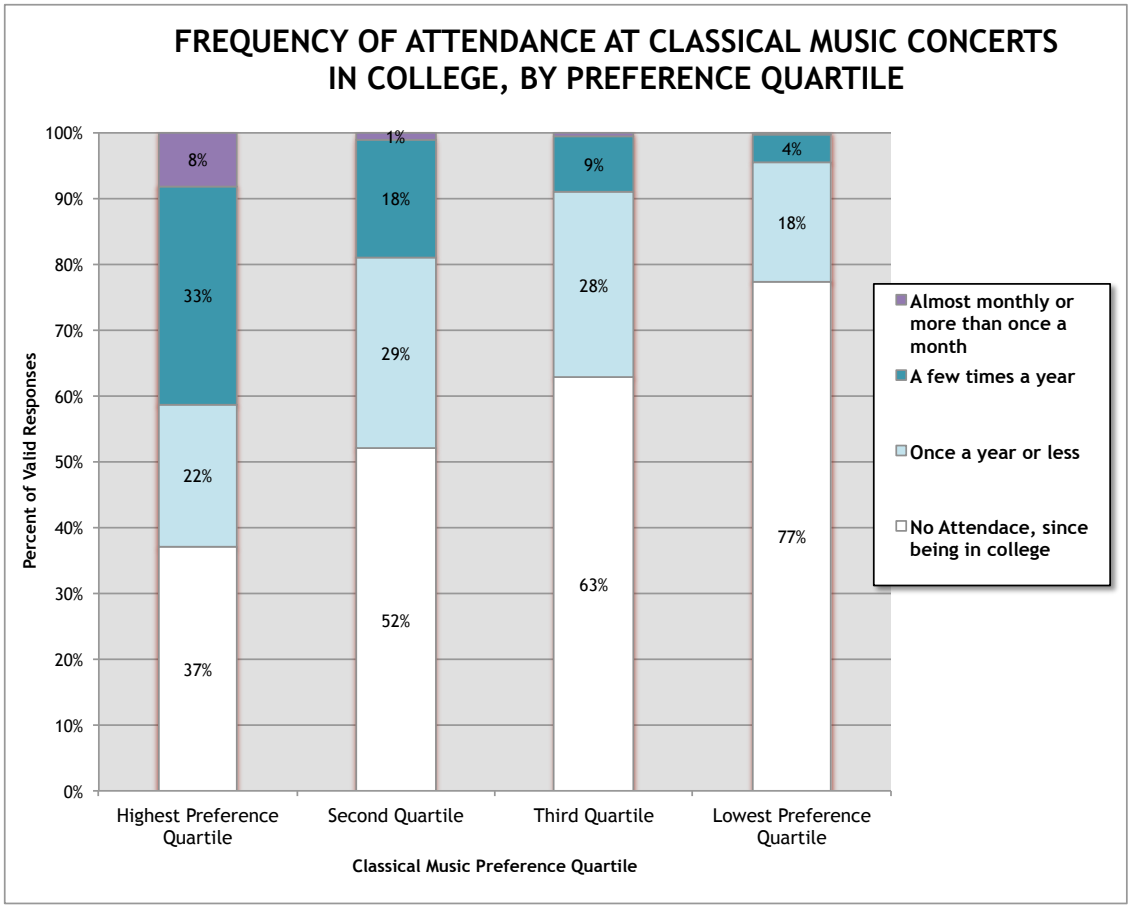
- Students were asked if they had been to at least one classical music concert by an orchestra, soloist, or chamber music group, by either student or professional musicians, since being at college. The chart at left illustrates results by preference quartile.
  - Students who said they would definitely not attend a free concert (i.e., 8%, on average) were not asked this question, so these results reflect the 92% of eligible respondents with a positive bias towards classical music.
- Among the students with the lowest preference levels for classical music (i.e., the fourth preference quartile), 23% have been to a classical music concert.
- Among students with the highest preference levels for classical music (i.e., the first preference quartile), 63% have been to a classical music concert, but 37% haven't. For respondents in the second preference quartile, 52% haven't been to a concert since being at college.
  - It is not unreasonable to conclude that a large share of students with pro-classical music attitudes are not attending concerts, for one reason or another.

Frequency of attendance at Classical Music Concerts among those who've attended at least one concert



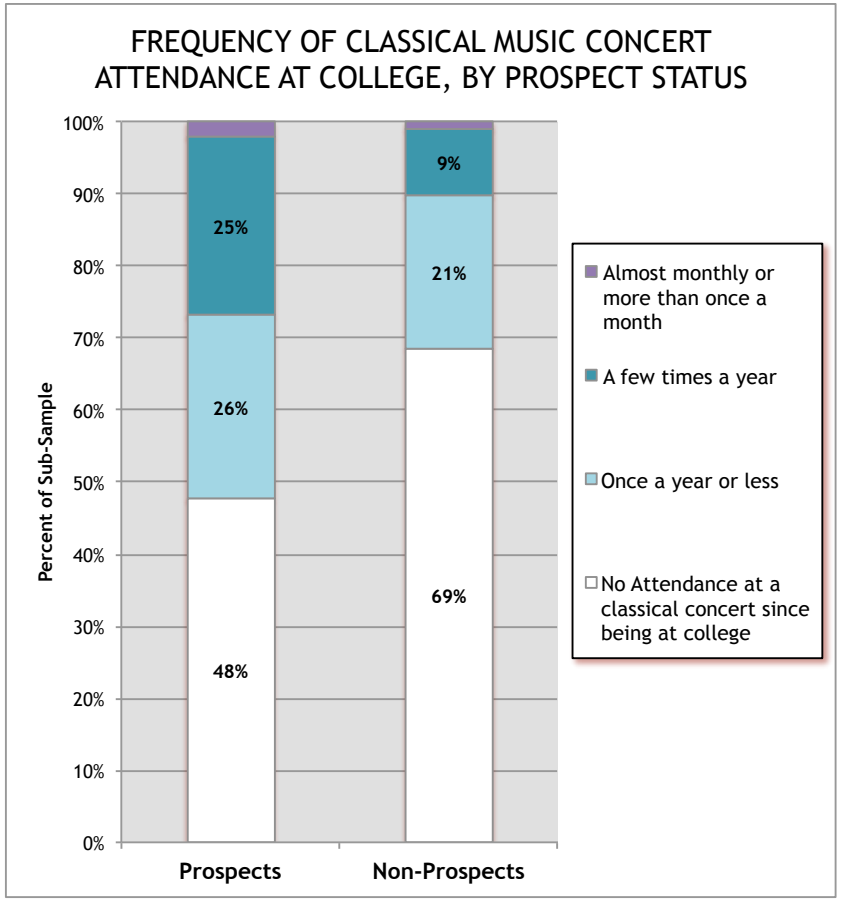
- Most students who reported any attendance at a classical music concert since being at college go infrequently.
- Of the 54% who've attended at least one concert, 55% go "once a year or less" and another 39% go "a few times a year." Only 6% go "almost monthly or more than once a month."
- Dartmouth students were most likely of the seven sites to report a higher frequency of attendance.

Frequency of Attendance at Classical Music Concerts, by Preference Quartile



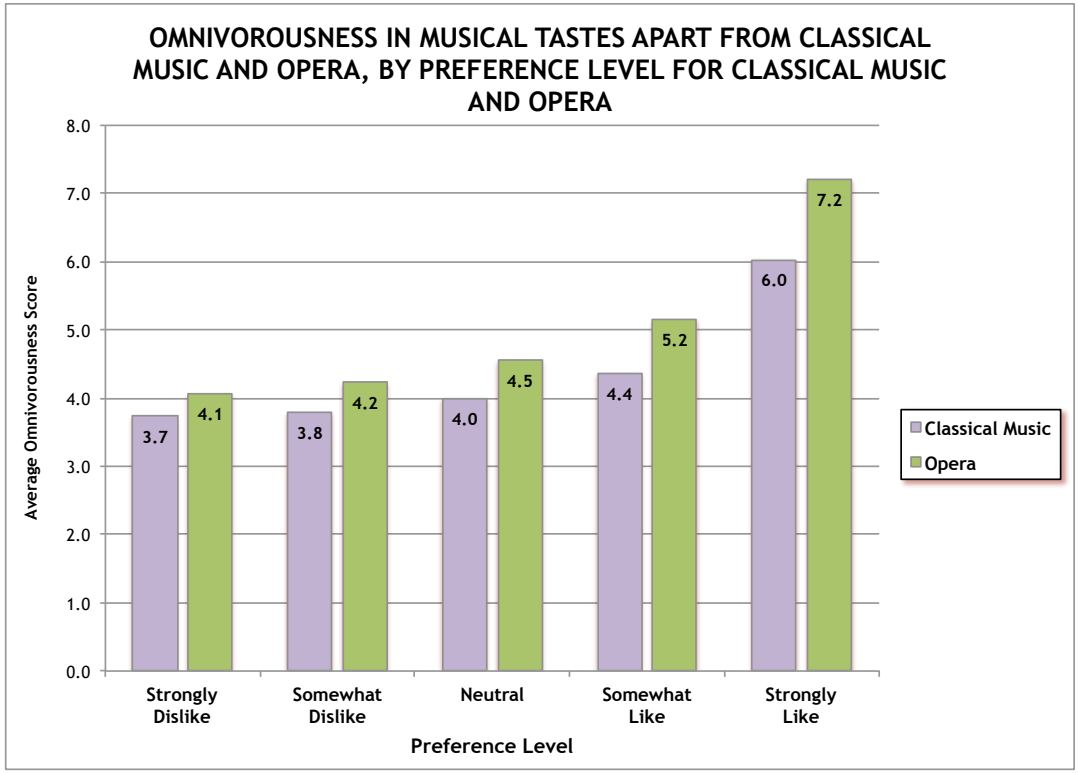
- Some of those who love classical music a great deal are not attending with much frequency. For example, 22% of students in the highest quartile for classical music preference attend classical concerts once a year or less often.
- When added to the 37% who have not attended at all, one finds that almost six in ten students with the highest preferences for classical music attend infrequently or not at all.

Definition of Classical Music "Prospects"



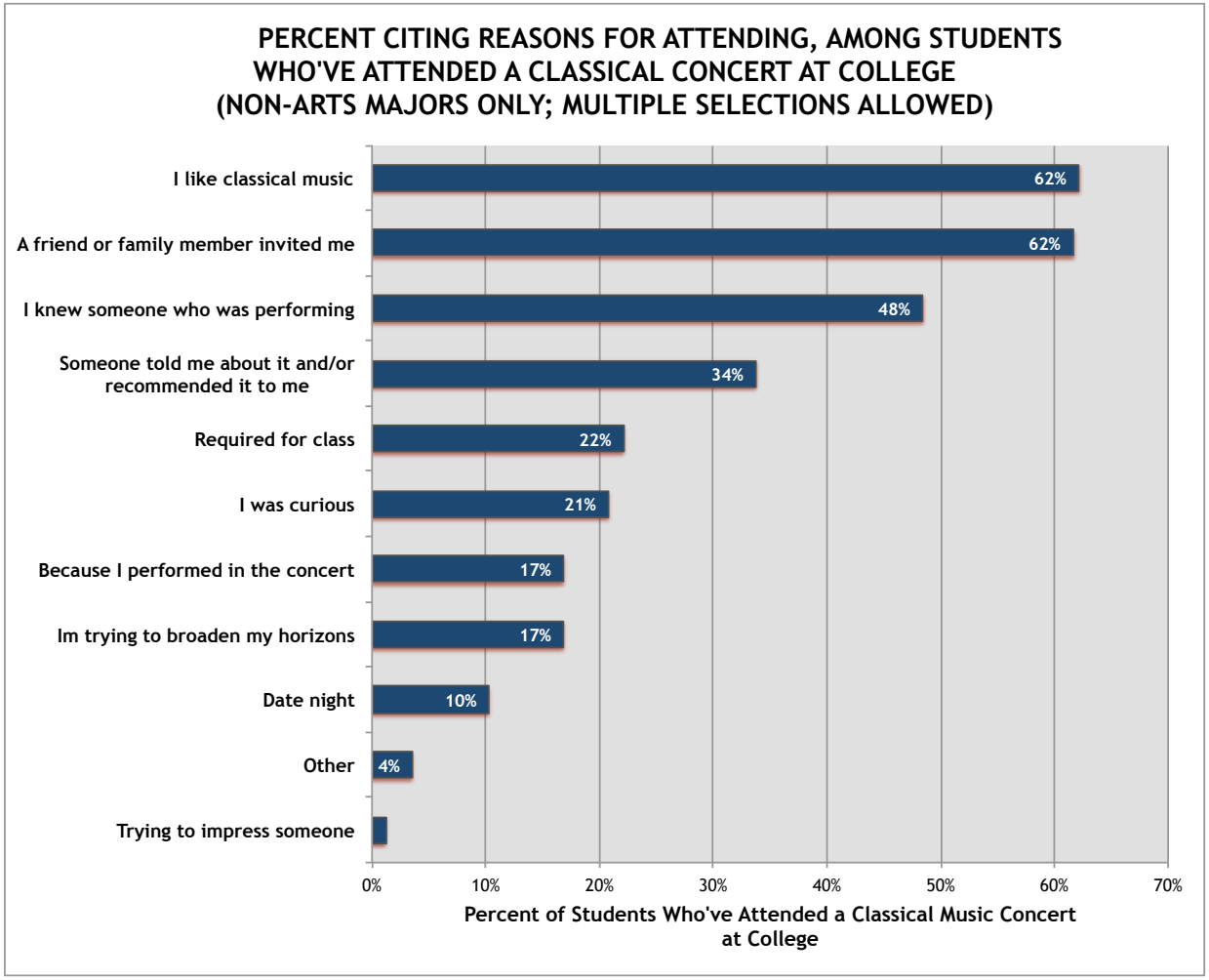
- It would be useful to understand how many students might be called "prospects" for increased attendance at classical music concerts.
- To facilitate this analysis, students were classified as a "prospect" if the following conditions were met:
  - They were frequently involved in high school band or choir, or
  - They reported an above-average classical music preference score (a composite variable)
- Then, students were then eliminated from this pool if:
  - They didn't express a desire to attend live concerts (of any kind) more often than they do now, or
  - They wouldn't accept a free ticket to a classical music concert, if offered by a friend or family member
- Based on this definition, 39% of all students in the aggregated sample of non-arts majors could be described as classical music prospects. Likelihood of being a "prospect" does not vary by class level. The percentage of prospects is somewhat higher for Texas (45%), but otherwise consistent across the seven campuses.
- The chart at left illustrates the current frequency of attendance at classical music concerts for students classified as prospects vs. those who were not.
- Among the "prospect" base, 48% have never attended a classical concert since being in school, and another 26% attend at a low frequency ("once a year or less").
- The remaining 28% are already attending "a few times a year" or "almost monthly or more than once a month" and therefore are not really prospects, since they are already attending.
- Deducting this group of already-attending classical enthusiasts from the prospect pool, the total percentage of prospects falls to 29%, which is still a large number.
  - In general, this suggests a relatively large prospect pool of students who are interested in classical music, but haven't attended a concert.

Examining the Relationship between Taste Omnivorousness and Classical Music Preference



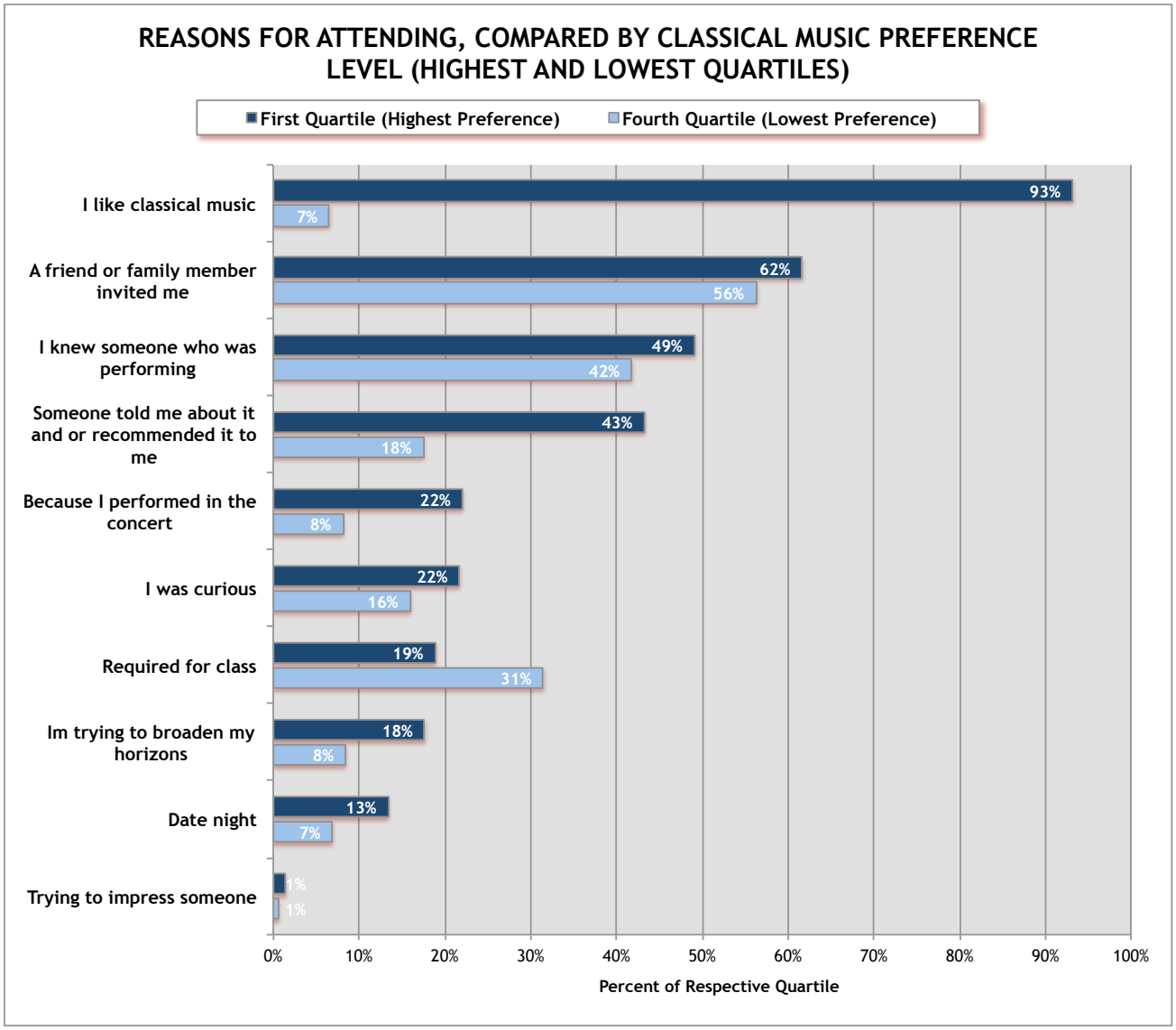
- Earlier in the report, we explored omnivorousness with respect to musical tastes.
- To test the relationship between overall omnivorousness of musical tastes and preference for classical music, another indicator of omnivorousness was created, this time without any of the classical music songs, and without the classical music or opera genres. This allows us to test the two phenomena with independent indicators.
- Results point to a very strong relationship between omnivorousness and classical music preference, as illustrated in the chart at left. Positive preferences for classical music and opera are associated with higher levels of omnivorousness in musical tastes in general. Statistically, the relationship is a bit stronger for classical music, although this is not evident in the chart at left. The Pearson correlation coefficient between omnivorousness and classical music preference is .25, compared to .20 for opera.
- Regressing the indicator of omnivorousness on the classical music preference score produces a highly significant relationship that explains about 7% of the variance.
  - The association between omnivorousness and classical music preference suggests that students are more likely to acquire affinity for classical music in the context of broadening their musical tastes more generally. Thus, presenters would be better served by taking a more holistic approach to the musical development of students, rather than focusing exclusively on classical music.

Reasons for Attending, among Students Who've Attended at Least One Classical Music Concert at School



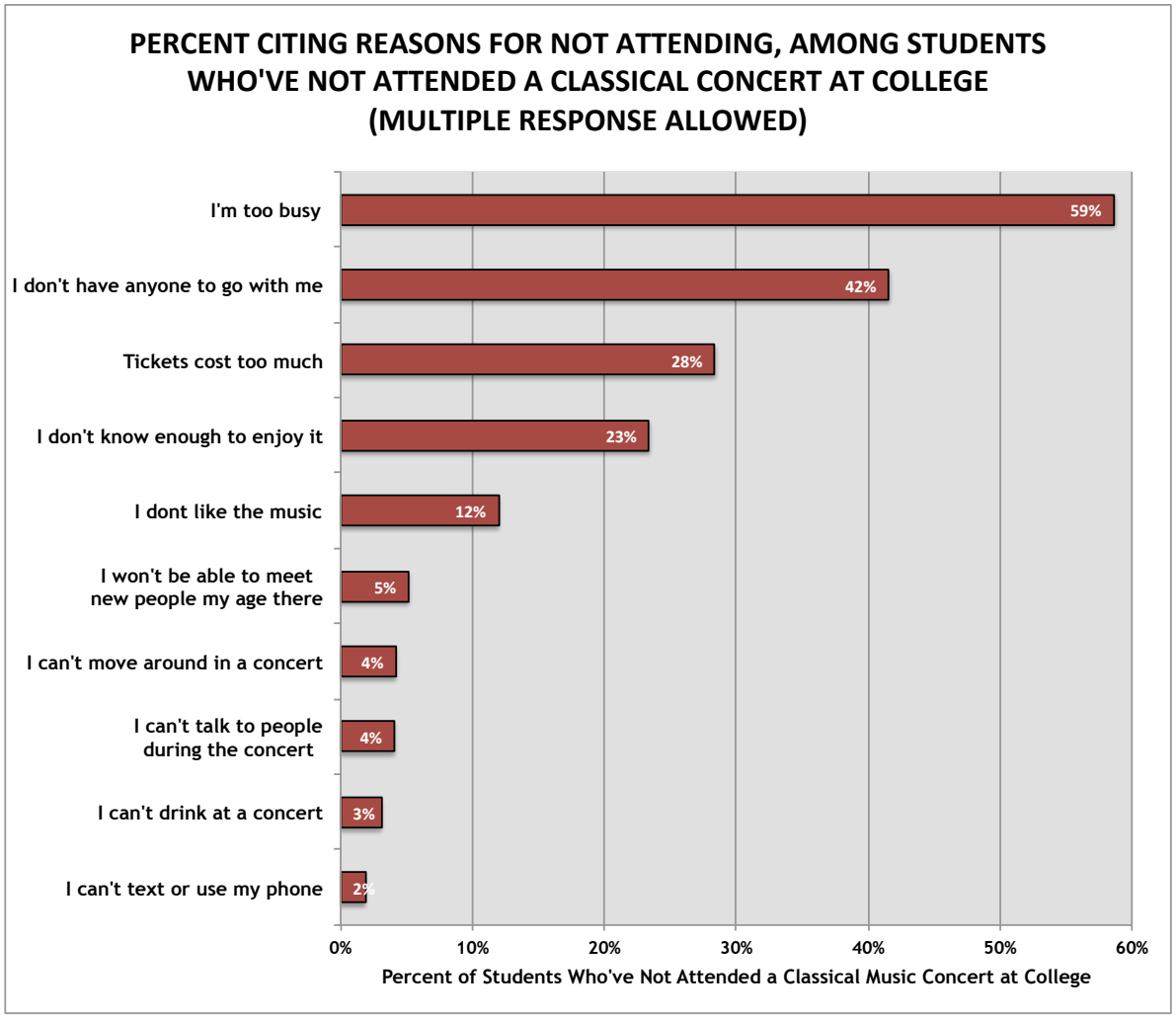
- Three reasons for attending dominate the motivational landscape amongst student who've attended at least one classical music concert since starting college:
  - a positive preference for classical music (62%)
  - a social stimulus (62%)
  - a personal connection to a performer (presumably reflecting attendance at concerts by student ensembles, 48%)
- Nearly a quarter of those who've attended at least one concert say that their attendance was motivated by a course requirement (22%). And another 17% said they attended by virtue of being a performer themselves. (Bear in mind this analysis excludes arts majors).

Reasons for Attending, by Classical Music Preference Level



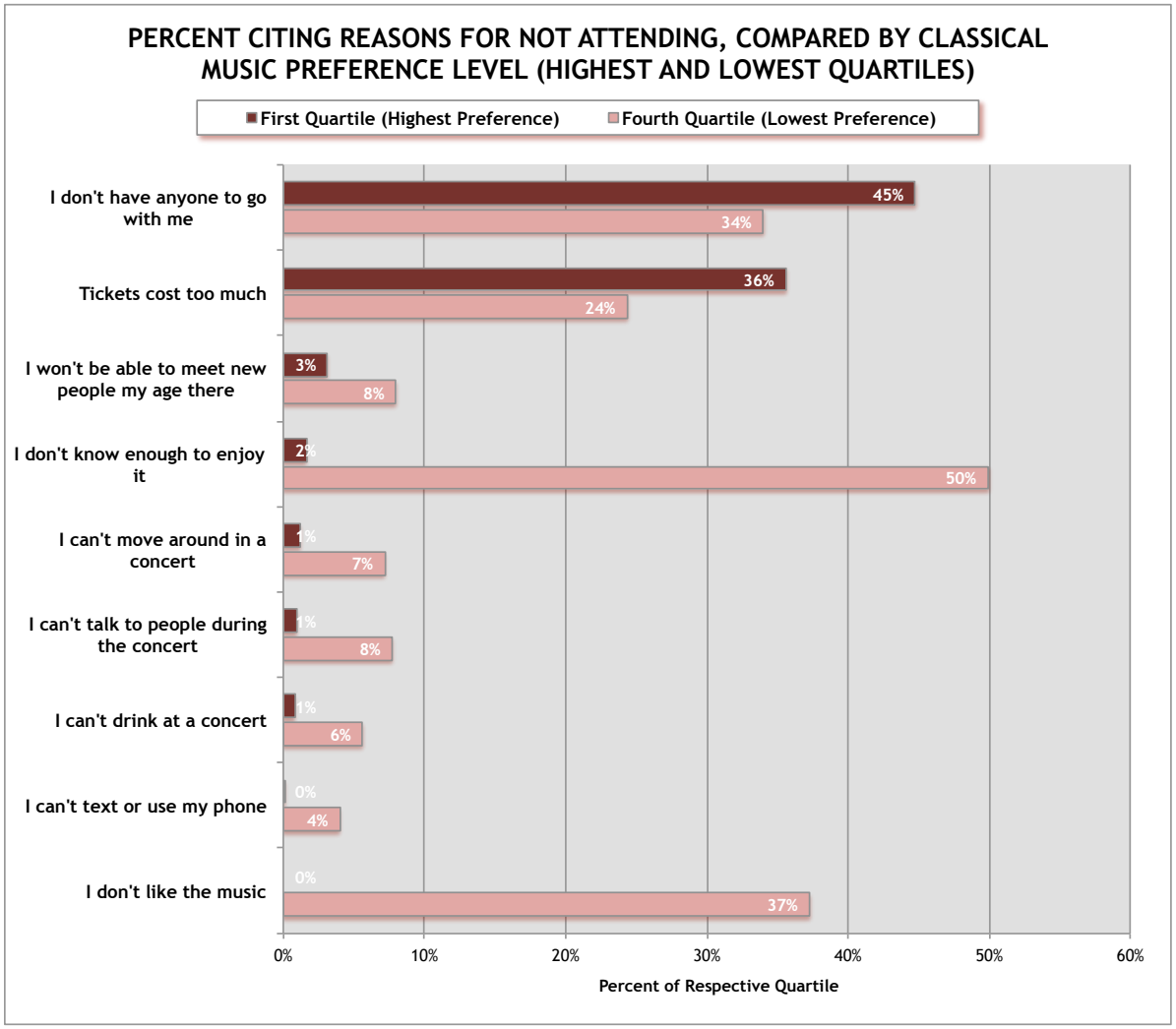
- As students gain more knowledge about classical music, do their reasons for attending change?
- To address this question, reasons for attending were analyzed in reference to respondents' overall classical music preference scores. The chart at left illustrates results for the highest and lowest preference quartiles, to expose the largest differences.
- As would be expected, almost no students with low preference levels attend because they like classical music. Rather, they attend for three primary reasons: 1) because of a social stimulus (56%); 2) because they know someone performing; and 3) because they are required to for a class.
  - Here we see the impact of academic integration in reaching student who would not normally choose to attend a classical music concert.
  - This also demonstrates the vital importance of social network marketing, and price incentives that foster attendance in small social groups.

Barriers among Non-Attenders



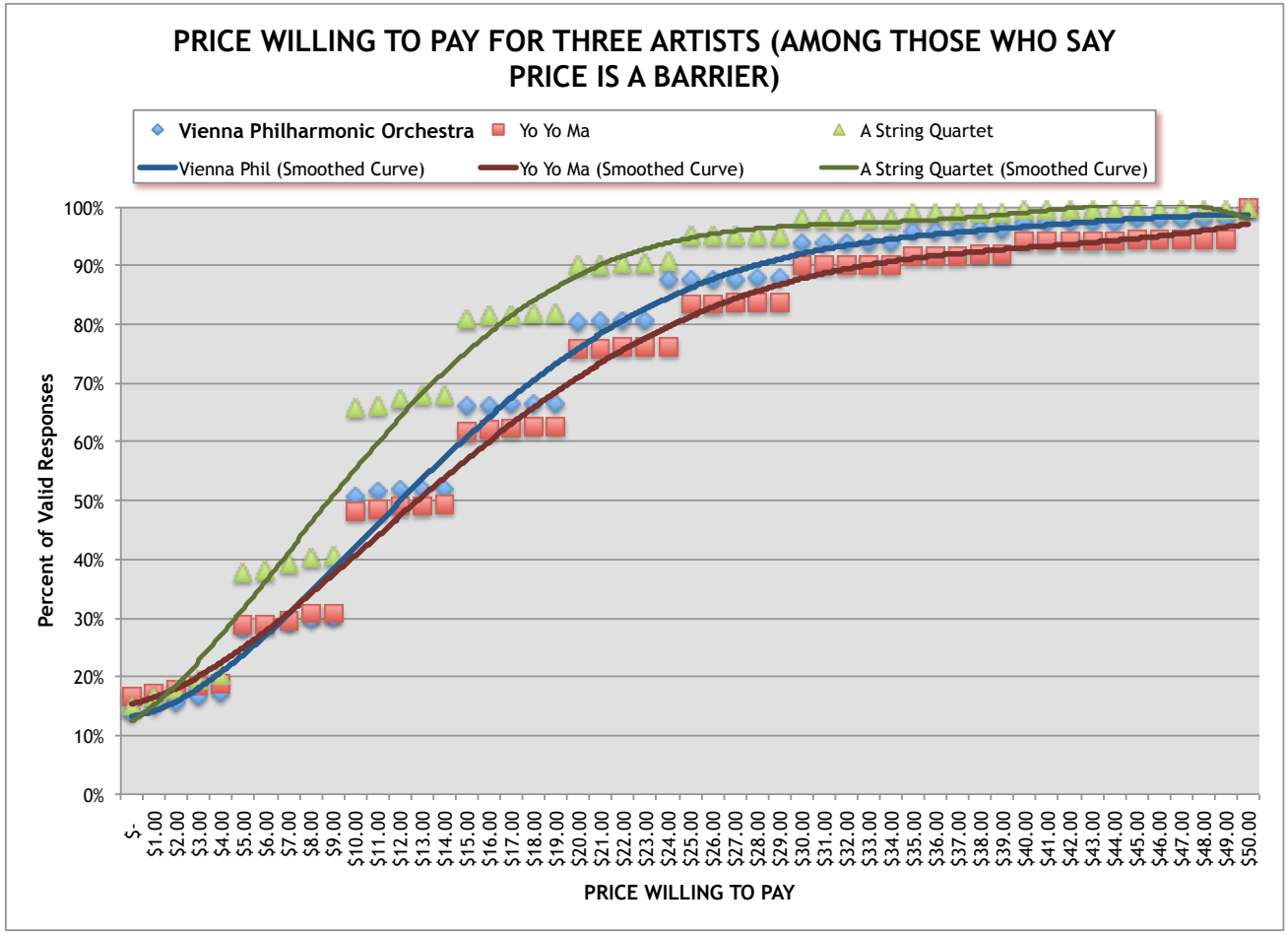
- Students who reported that they had not attended a classical concert since being at college were asked to indicate why.
- Only 12% cited lack of interest in the music, and another 23% indicated some level of anxiety that they'd not "know enough to enjoy it."
- The predominant reason given for not attending was "I'm too busy."
  - While most college students are, indeed, very busy, most will make time to do things they really want to do. What they are really saying here is, "Going to classical concerts is not a high enough priority for me to make time to do it." This is less of a barrier, and more of a statement about the weak value proposition.
- The second most prevalent reason cited for not attending more often is "I don't have anyone to go with me."
  - This underscores the critical importance of social context in stimulating demand, and the importance of creating incentives for students to attend in friendship groups.
- Typically, in surveys of this nature, cost is the predominant barrier. Instead, it is the third most important barrier here, perhaps a reflection of some degree of awareness of the availability of subsidized tickets.

Barriers among Non-Attenders, by Classical Music Preference Level



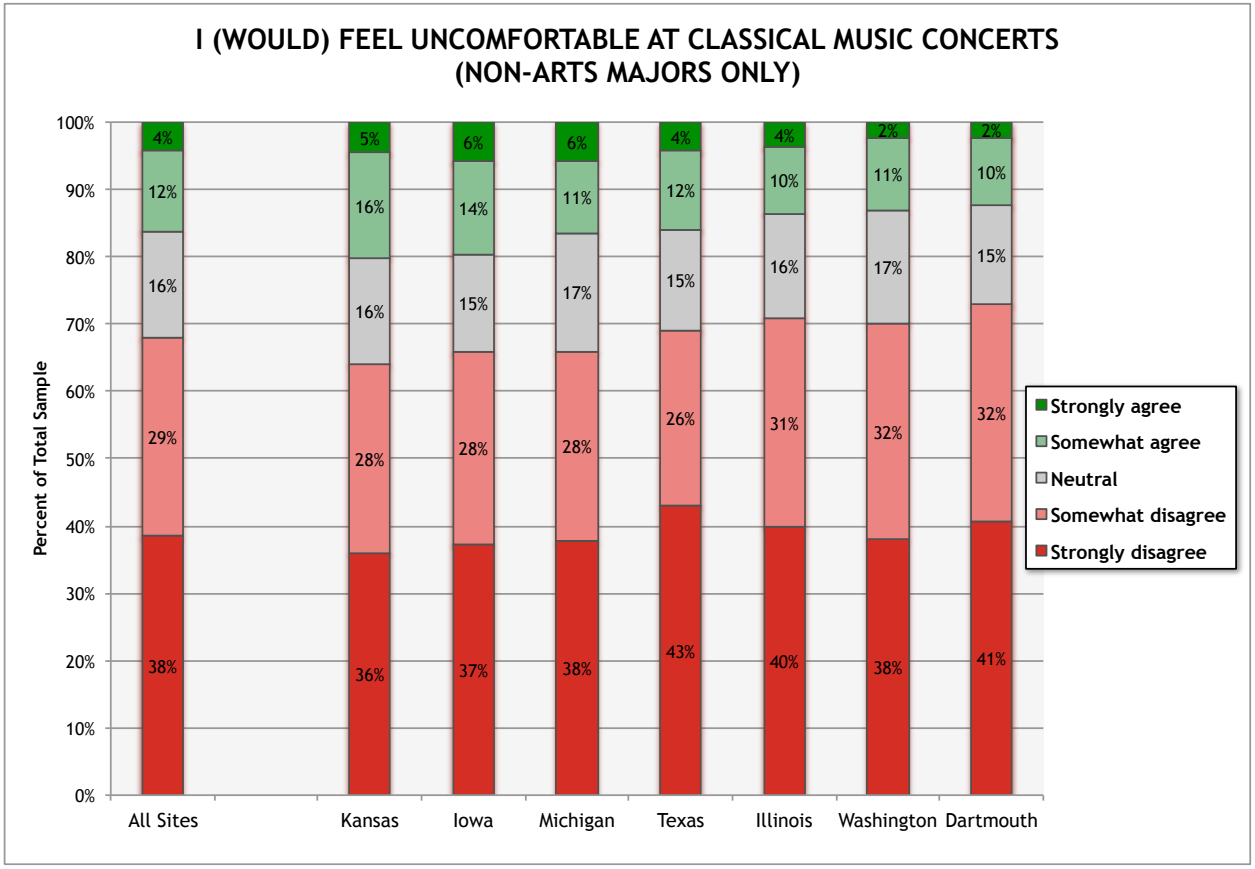
- Further analysis reveals that reasons for not attending vary dramatically by knowledge level.
- The dominant barriers among students with high preference levels for classical music are; 1) "I don't have anyone to go with me," and 2) "Tickets cost too much."
- Among students with low levels of preference for classical music, however, the barriers are completely different. By a wide margin, the dominant barrier for these students is the anxiety resulting from feeling that they'll not know enough to enjoy the experience.
  - What can presenters do to mitigate this barrier? Offering educational activities in conjunction with classical concerts is a good start, but the answer is not that simple. There are marketing considerations here, in terms of messaging, but there are also format considerations and other structural changes to the concert experience that might help to mitigate this barrier.
- Lack of a social stimulus is also a significant barrier for low-preference students, as well as all the other things you can't do at a concert.

Price Willing to Pay, Among Respondents who Cite Cost as a Barrier



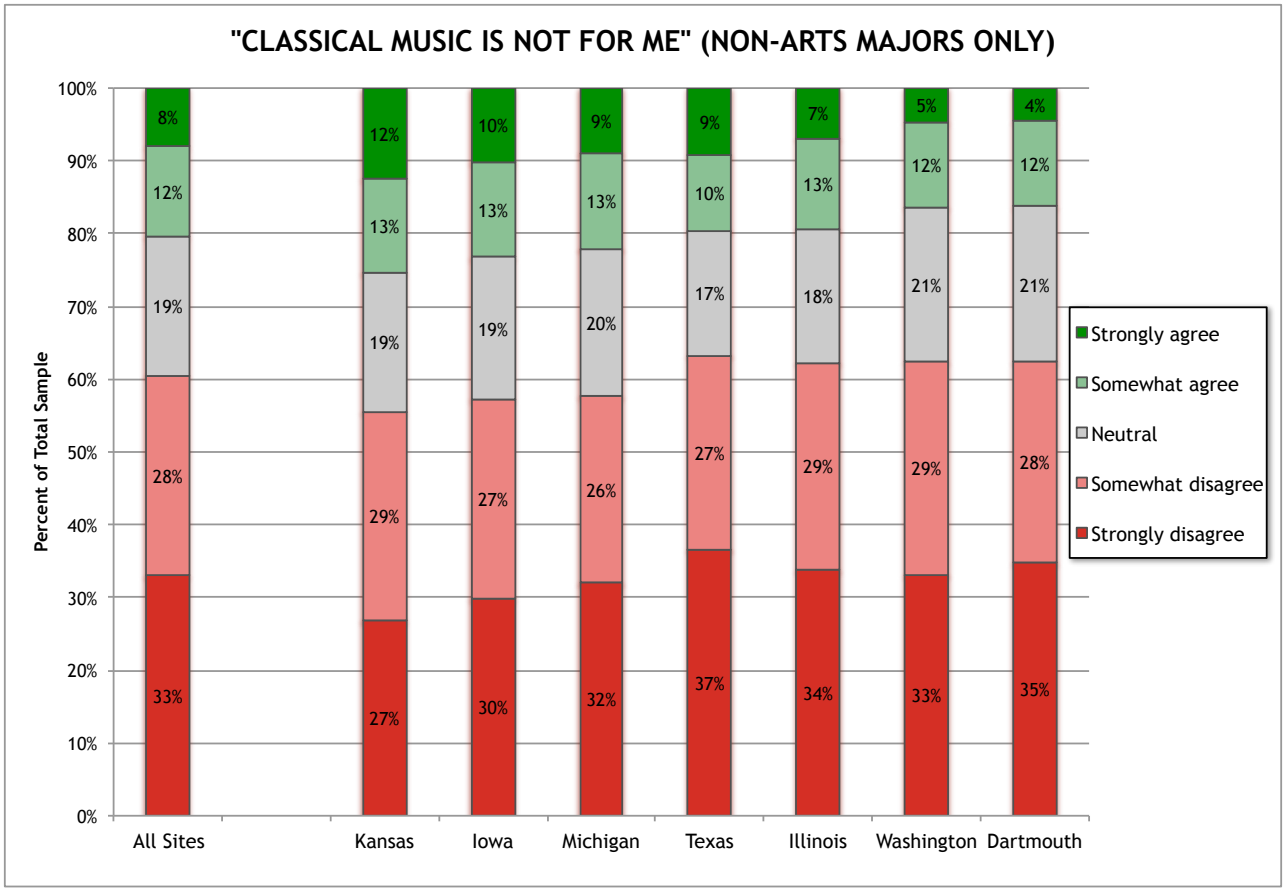
- Respondents who cited "tickets cost too much" as a barrier were asked an additional question: "Suppose that you learned that the following artists were going to play a concert on your campus. How much would you be willing to pay for a ticket to the concert (between $0 and $50)?"
- The chart at left illustrates the percentage of students willing to pay up to $50. The flatter the line, the more they are willing to pay. The average prices that students are willing to pay for each artist are:
  - Yo Yo Ma: $15.51
  - Vienna Phil $14.15
  - A string quartet $10.62
- The median prices are lower than the average prices, due to a skew at the high end of the price scale. For example, the median price for Vienna Phil is $10, with half above and half below.
  - Generally, these prices are in line with student discount prices (although not necessarily for these specific artists), so the question remains whether price is really the barrier, or perception of price.

“I (would) feel uncomfortable at classical music concerts.”



- Further exploration of barriers is available through this question, which asked students to agree or disagree with the statement, “I (would) feel uncomfortable at classical music concerts.”
- A large majority of all students (68%) disagree on some level with this statement, while 16% agree with the statement, and another 16% are neutral.
- Little variance was observed across the seven campuses.
- Further analysis reveals a surprising level of concern about feeling uncomfortable amongst students who love classical music. Three in ten students with the highest preference level for classical music agreed strongly that they feel (or would feel) uncomfortable at a classical music concert.
  - This may be based on actual experience, or may be based on perceptions (if they’ve not attended).
  - The first challenge to presenters is welcoming students who already love classical music.
- Half of students in the lowest quartile of preference for classical music agreed strongly with this statement.

“Classical Music is not for me.”



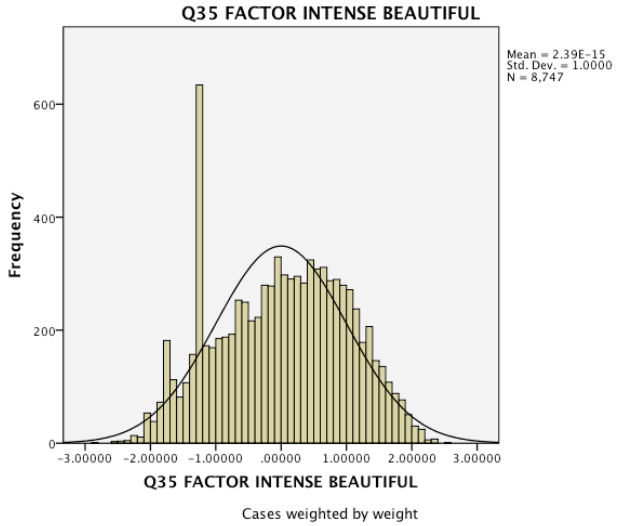
- Students indicated the degree to which they agree or disagree with the statement, “Classical music is not for me.”
- A majority of students (60%) disagree on some level with this statement, while 20% agree with the statement, and another 19% are neutral.
- A small amount of variance was observed across the seven campuses, with Kansas and Iowa students agreeing the most with this statement, and Washington and Dartmouth students agreeing the least.

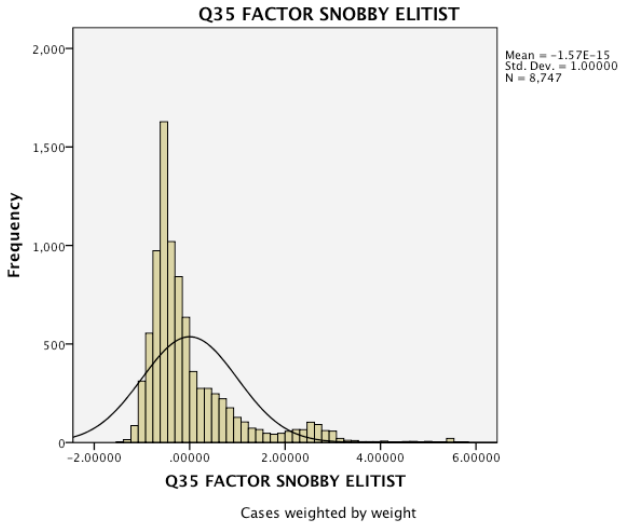
Attitudes and Feelings about Classical Music

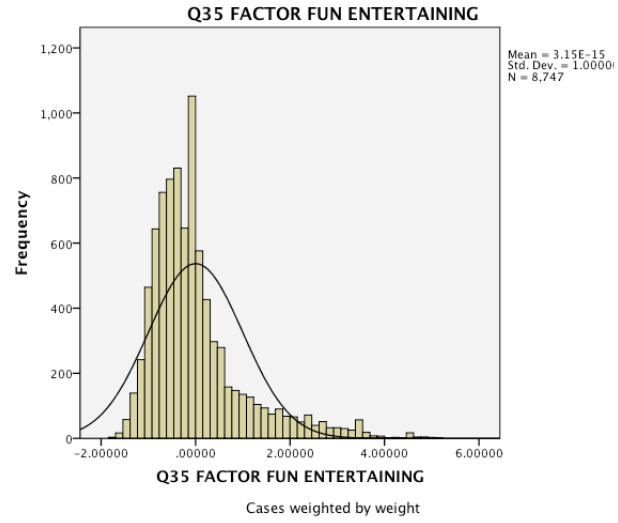
Feelings about Classical Music

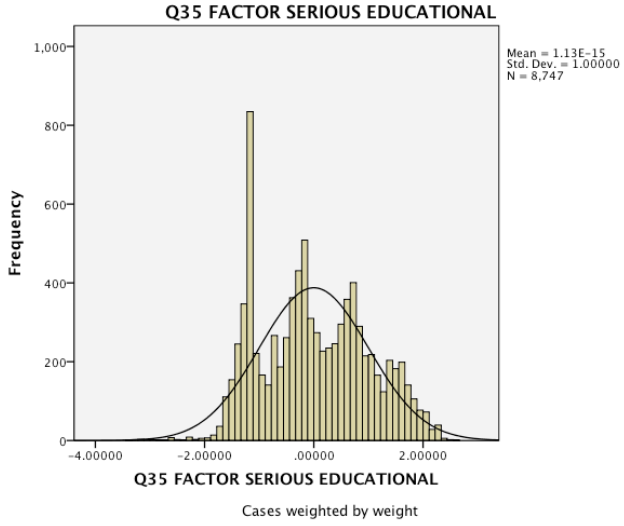
- Respondents were provided with a list of 21 one-word adjectives or descriptors that might be associated with classical music, ranging from "boring" to "beautiful," and asked, "When you think of classical music, what words do you most strongly associate with it?"
- A simple word cloud depiction of the raw data appears on this page.
- The relative size of the words corresponds to their frequency of being cited. The colors in this word cloud, and the proximity of the words to each other, do not mean anything.
- For example, this rough analysis suggests that students perceive classical music as much more "serious" than "fun."

Natural Grouping of Descriptors



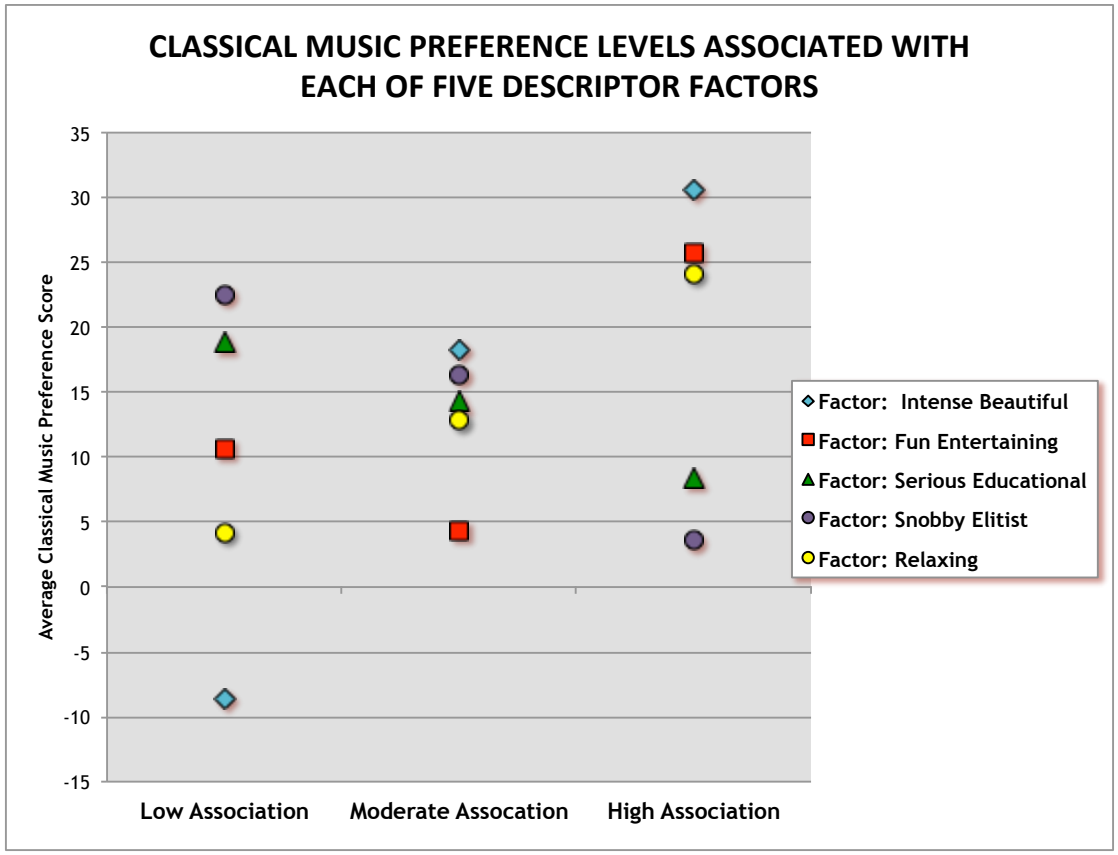






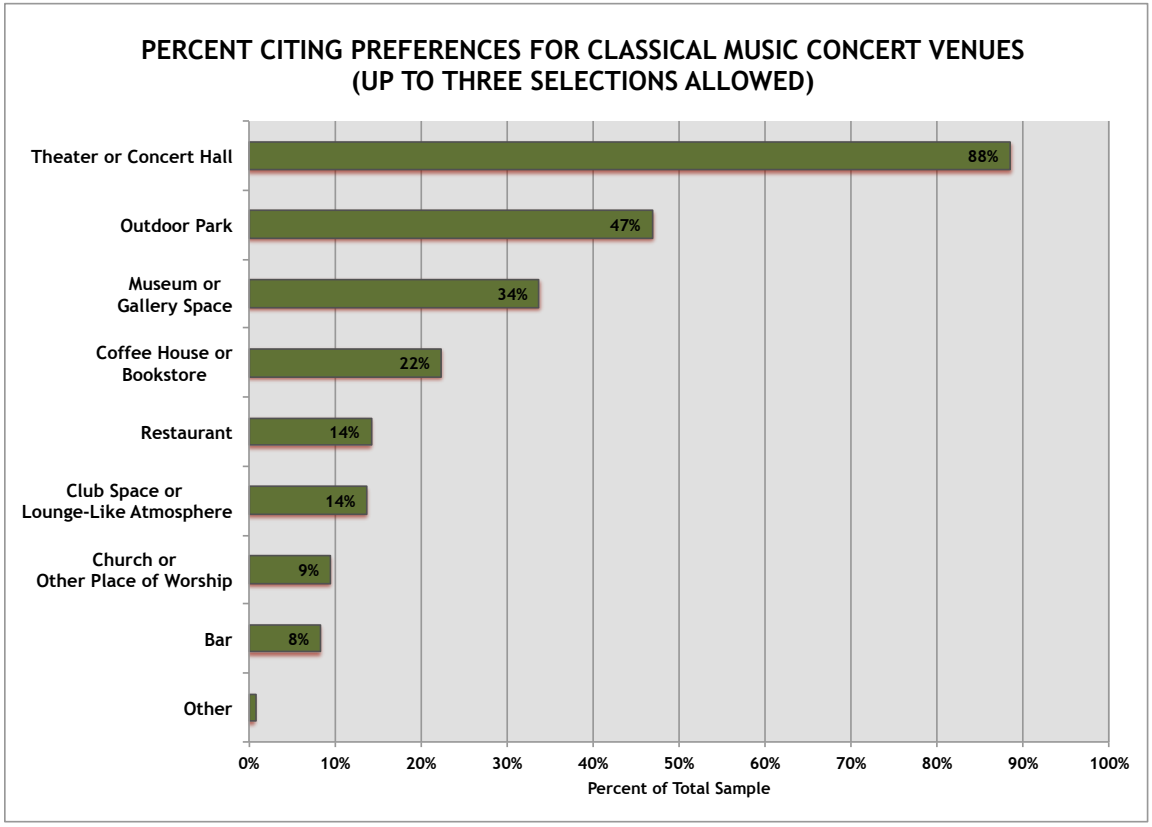
- To facilitate further analysis, the 21 descriptors were reduced to five underlying factors, as follows:
  - A factor encompassing: passionate, intense, beautiful, impressive and stimulating
  - A factor encompassing: fun, entertaining, energetic, unpredictable, and special
  - A factor encompassing: traditional, serious, and educational
  - A factor encompassing: snobby, elitist, noisy, and boring
  - A factor encompassing: relaxing and nostalgic
- Two of the 21 descriptors were found to load on multiple factors, and were thus dropped: excellent and creative.
- Four of the five histograms illustrating the factor score distributions are shown at left.
  - Note, for example, that most respondents load negatively on the "snobby elitist" factor (i.e., they negatively associate this factor with classical music).
  - Generally, the more of the distribution that you see to the right hand side of the zero point, the more prevalent the factor.
- Bear in mind that these factors are not mutually exclusive, but nevertheless are substantially different from each other.

Looking at Descriptors through the Lens of Classical Music Preference Levels



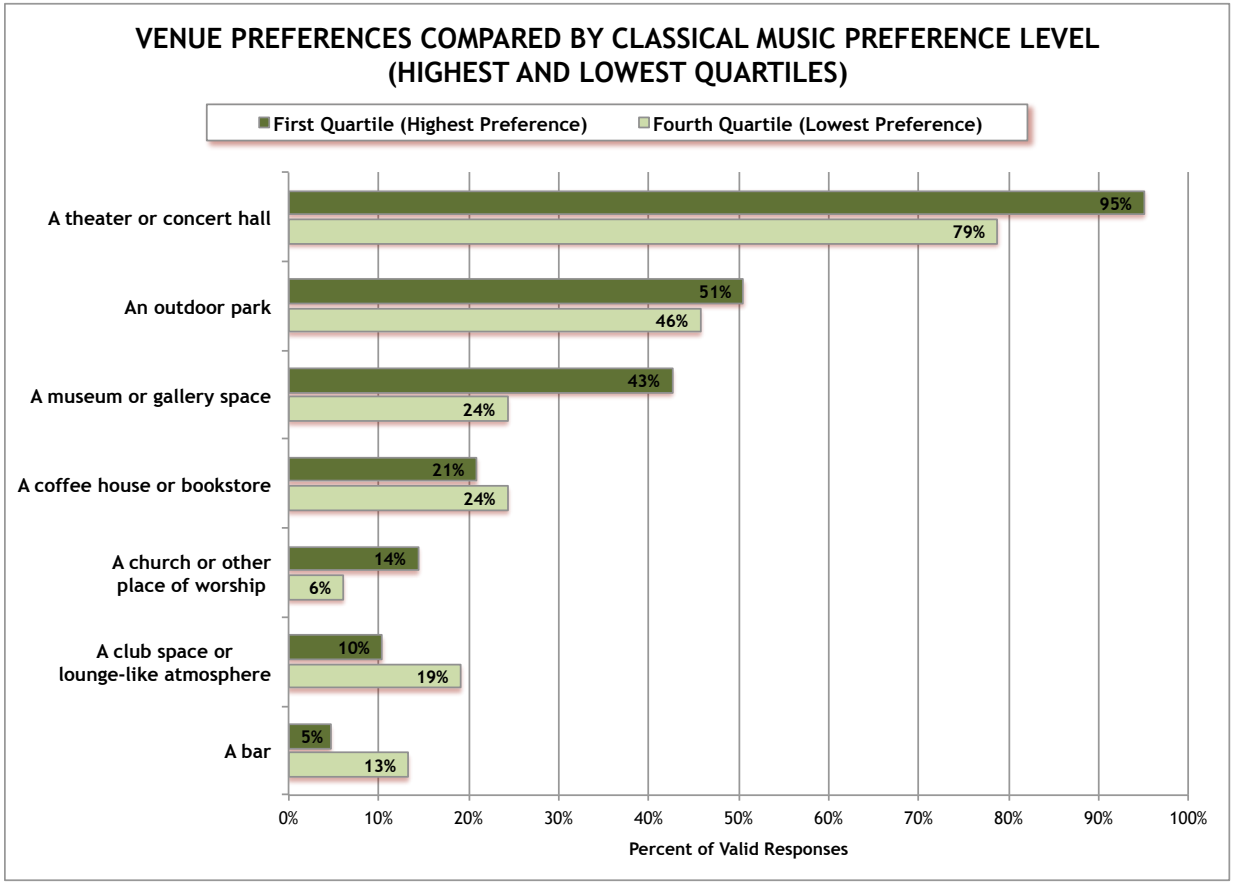
- The five groupings of descriptors can be analyzed against respondents' overall preference levels for classical music, in order to observe patterns.
- The chart at left reports average classical music preference scores (based on an aggregated variable that draws on numerous individual variables) for each of the five groupings of descriptors.
- For example, respondents with a low association with the "intense beautiful" descriptor group have negative preference levels for classical music (the blue diamond at lower left), as might be expected. Conversely, respondents with a high association with the "intense beautiful" descriptor group have high preference levels for classical music (the blue diamond at upper right).
- As might be expected, respondents with a low association with the "snobby elitist" descriptor group have a high preference for classical music, and *vice versa*.
- It would be useful from a marketing standpoint to better understand what positive descriptors of classical music are most likely to resonate with students with lower preference levels.
  - Further analysis points to these descriptors as most likely to engage students who have not yet developed a love for classical music: fun, entertaining, energetic, unpredictable, special, and relaxing.
  - Students with moderate and high preference levels are most likely to respond to descriptors in the "intense beautiful" group.

Venue Preferences



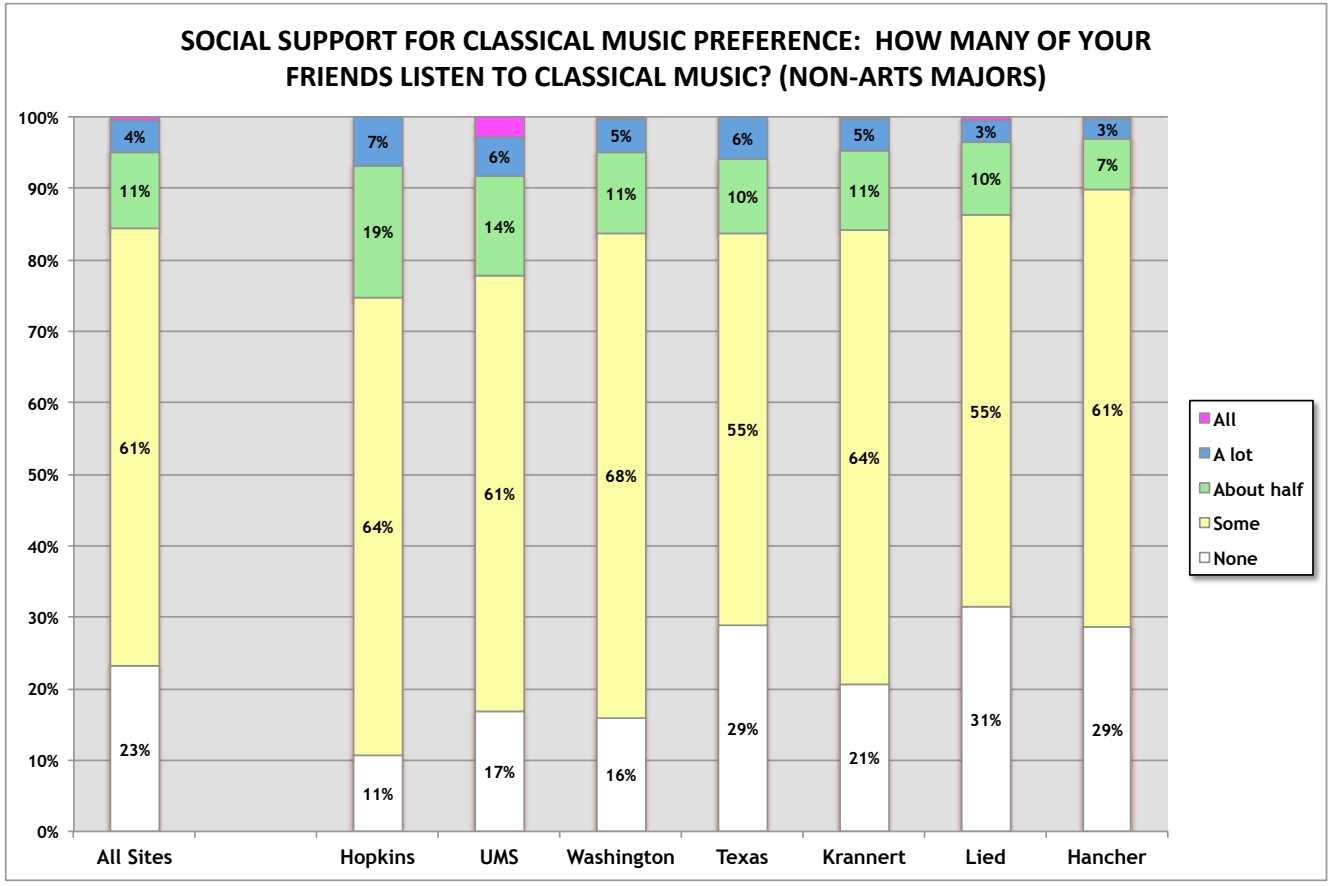
- Respondents were asked, "If you were going to go to a classical music concert, all else being equal, which type of venue would you most prefer to attend?" Up to three selections were permitted.
  - This question was not asked of respondents who indicated that they would not accept free tickets to a classical music concert, if offered by a friend or family member.
- Nearly nine in ten respondents indicated an interested in conventional concert spaces (i.e., a theatre or concert hall), while another 47% idealize an outdoor space, and a third of respondents idealize a museum of gallery space.
- Exploratory factor analysis suggests four natural groupings of venue preferences: 1) a bar/club/lounge factor; 2) a coffee house factor; 3) an outdoor venue factor; and 4) a church/place of worship factor. In other words, preferences tend to organize around these four factors or groupings of settings. Note that theatres and concert halls are nearly universal in terms of preference, and thus do not drive enough variation to pull a separate factor. A very strong negative preference for theatres, however, defines the coffee house factor. Similarly, a negative preference for churches defines the outdoor venue factor.

Relationship between Venue Preferences and Classical Music Preference



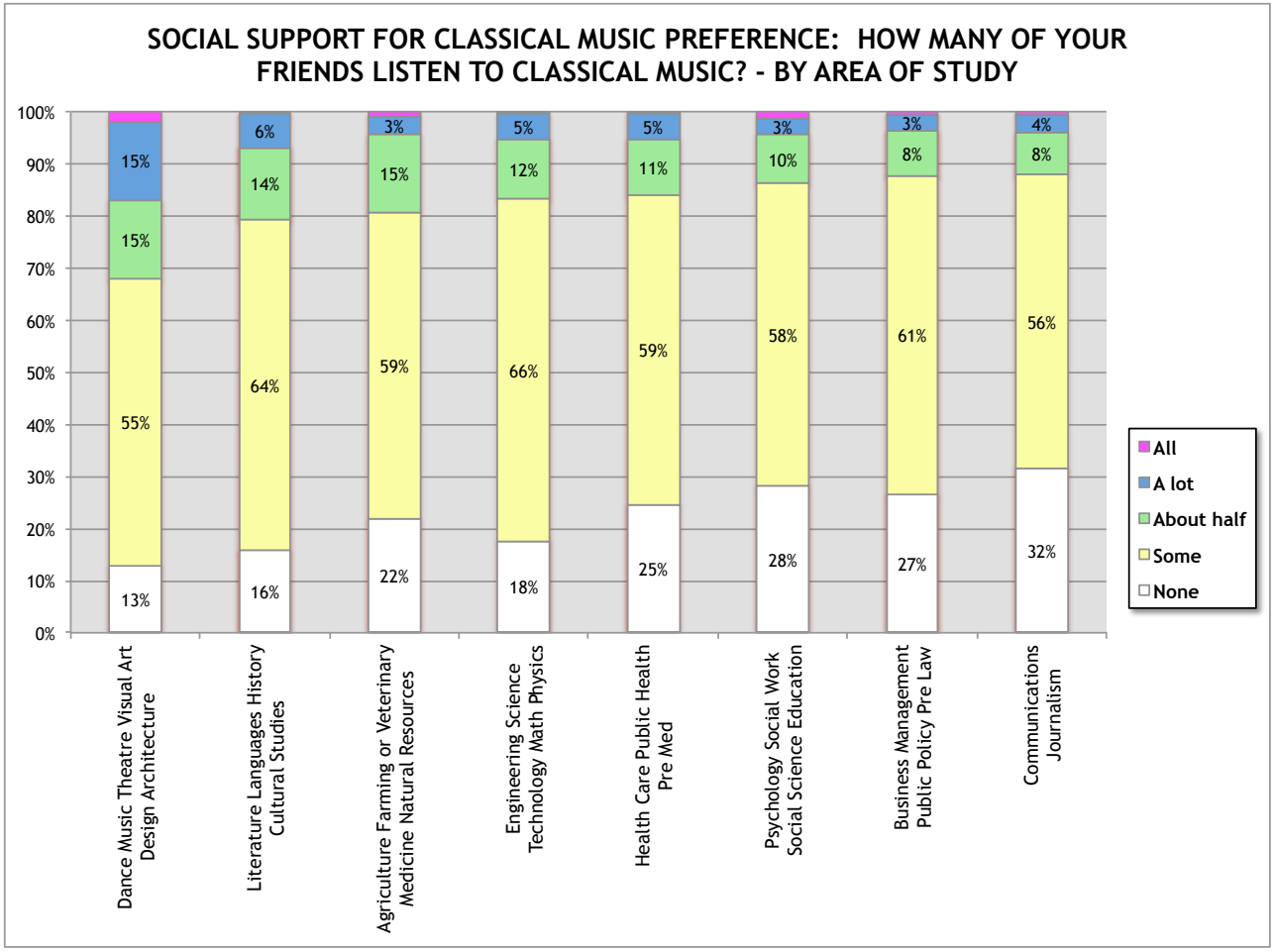
- How do venue preferences vary for those who like vs. don't like classical music?
- To address this question, venue preferences were analyzed in reference to respondents' overall classical music preference scores. The chart at left illustrates results for the highest and lowest preference quartiles, to expose the largest differences.
- Theatres and concert halls are preferred the most by students with both high and low preferences, but to a lesser extent for those with lower preferences (95% vs. 79%).
- Note that museum or gallery spaces are preferred at a significantly higher rate by students with high preference for classical music (43% vs. 24% for those with low preference).
- Similarly, churches are preferred by students with high preference for classical music at over twice the rate of students with low preference levels (14% vs. 6%, respectively).
- Contrariwise, students with low classical music preference levels are more likely to prefer informal venues like coffee houses, bars and club spaces.
  - Varying the settings where concerts take place is seen as a strategy for building demand. In selecting alternative venues, consider what kinds of students are likely to relate to different spaces.

Social Support for Classical Music Preference



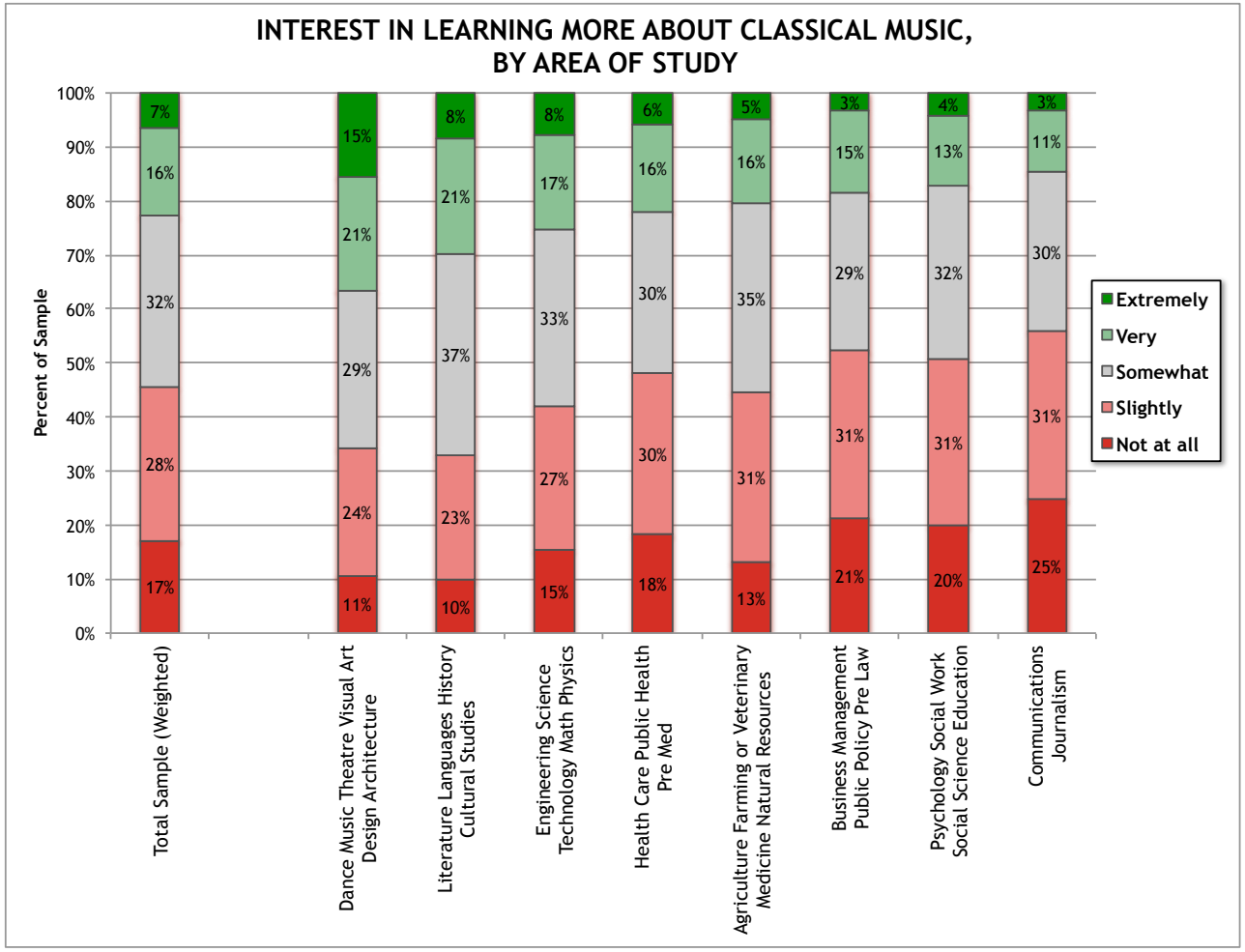
- On average, 77% of non-arts students across the seven campuses say that at least "some" of their friends listen to classical music, whereas just 15% say that half or more of their friends listen to classical music.
  - Put another way, about three-quarters of students are one degree of separation away from someone who listens to classical music, if they can be influenced through peer networks.
- Across the seven campuses, Dartmouth and Michigan students reported slightly higher levels of social support for classical music.

Social Support for Classical Music Preference, by Area of Study



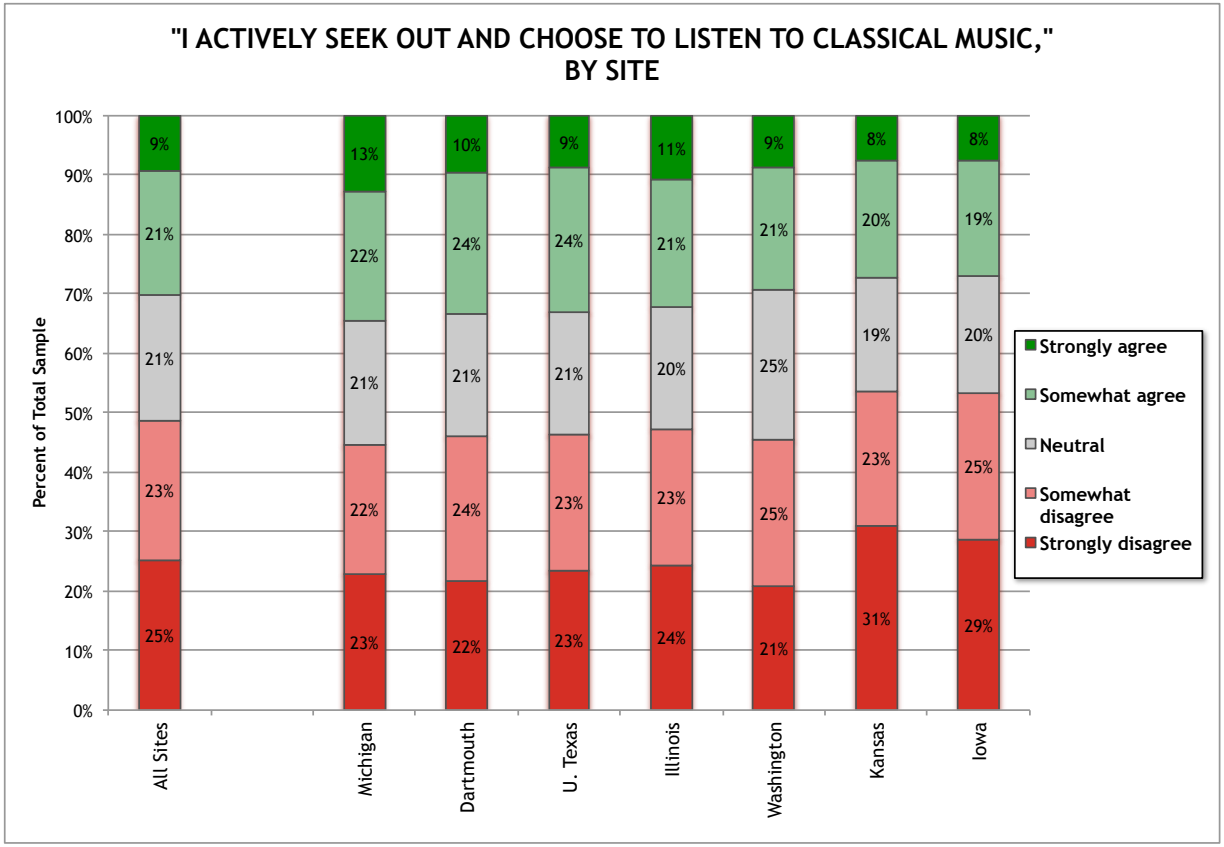
- Of course, students who are arts majors (dance, music, theatre, visual art, design and architecture) are more likely than non-arts majors to have friends who listen to classical music.
- Across the non-arts academic disciplines, students in the fields of literature, languages, history and cultural studies are most likely to have friends who listen to classical music, while communications and journalism students are least likely. The differences, however, are not great.

Interest in Learning More about Classical Music



- Students were asked, "How interested are you in learning more about classical music?"
- Overall, 22% of students with non-arts majors say that they're "very" or "extremely" interested in learning more about classical music. This compares to 36% of arts majors.
- Across the various areas of study, interest is highest among students in the combined fields of literature, languages, history and cultural studies, followed by students in the combined fields of engineering, science, technology, math and physics.
- Beyond those who expressed positive interest, another third of students are "somewhat" interested.

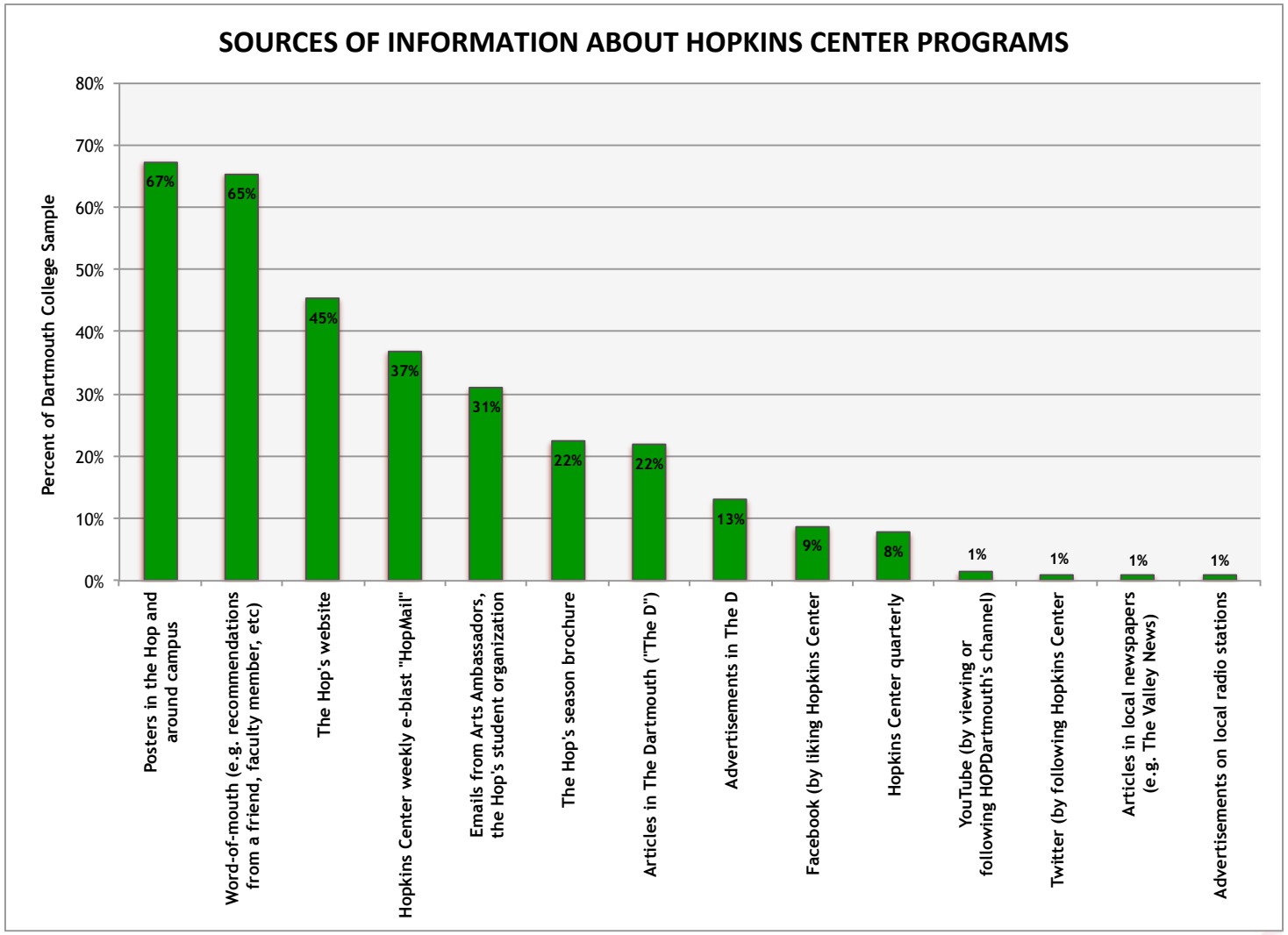
“I actively seek out and choose to listen to classical music.”



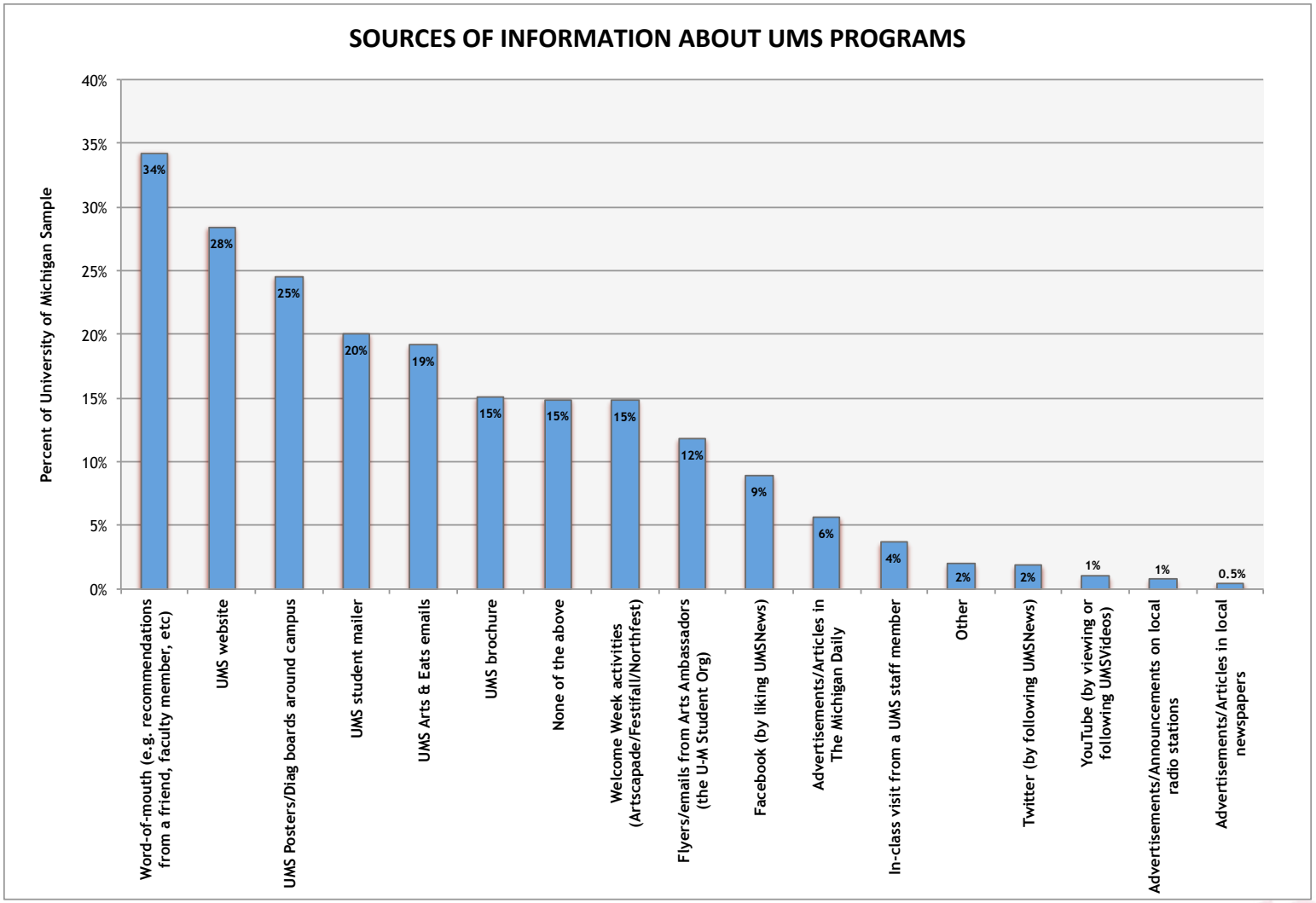
- To gauge overall interest in listening to classical music, students were asked the degree to which they agree or disagree with the following statement: “I actively seek out and choose to listen to classical music.” Across all sites, 30% agree.
- Overall, 29% of non-arts majors, and 46% of arts majors, ‘somewhat agree’ or ‘strongly agree’ with this statement, suggesting that roughly three in ten students are actively seeking out classical music.
  - This compares to 44% who say they’ve ever been to a classical concert since being at college.
- Not much variation was observed across the seven campuses.
- Similar patterns were observed with respect to area of study.

Sources of Information about each Presenter's Programs (campus-specific answer items)

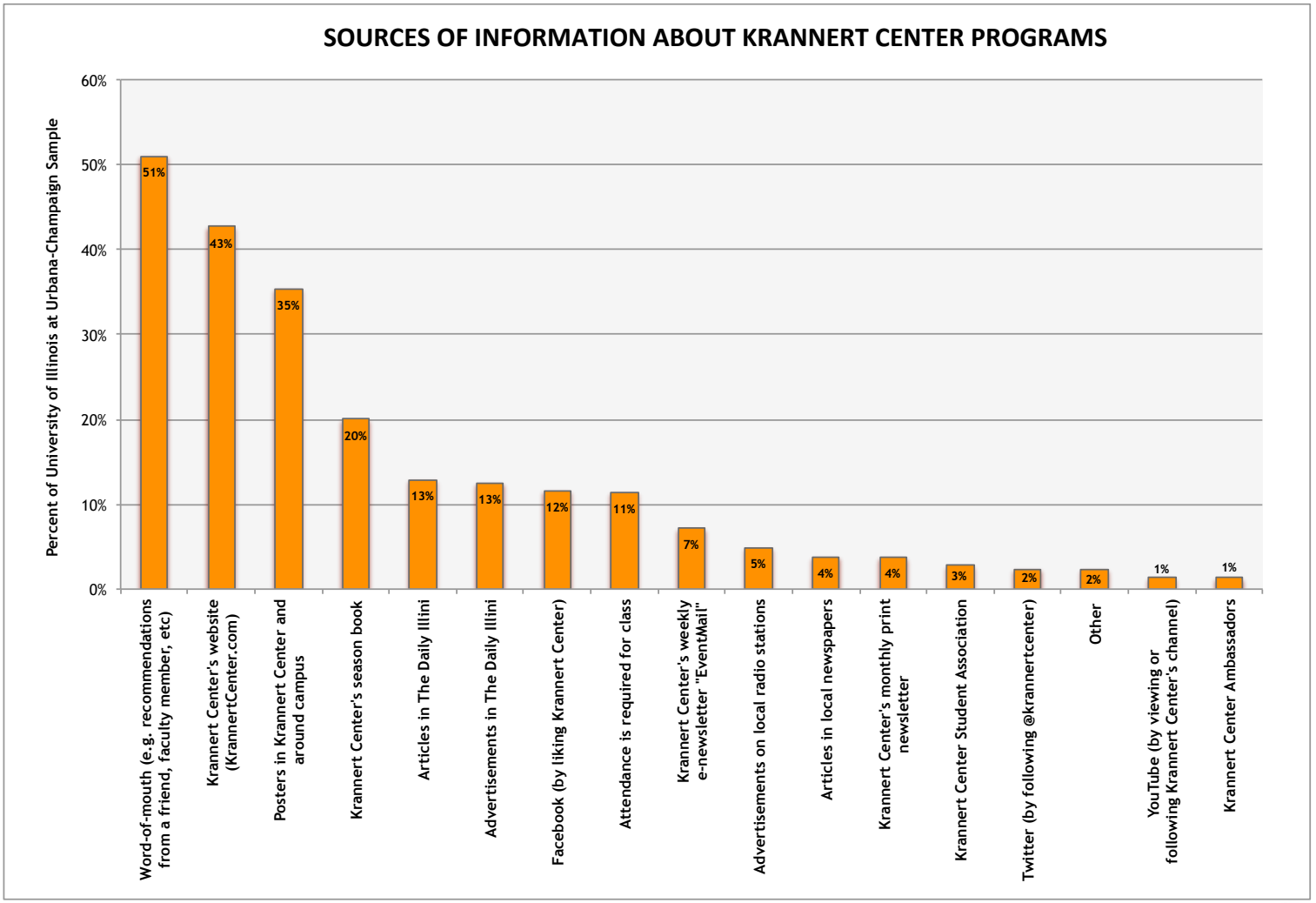
Sources of Information about Hopkins Center programs, Dartmouth respondents only



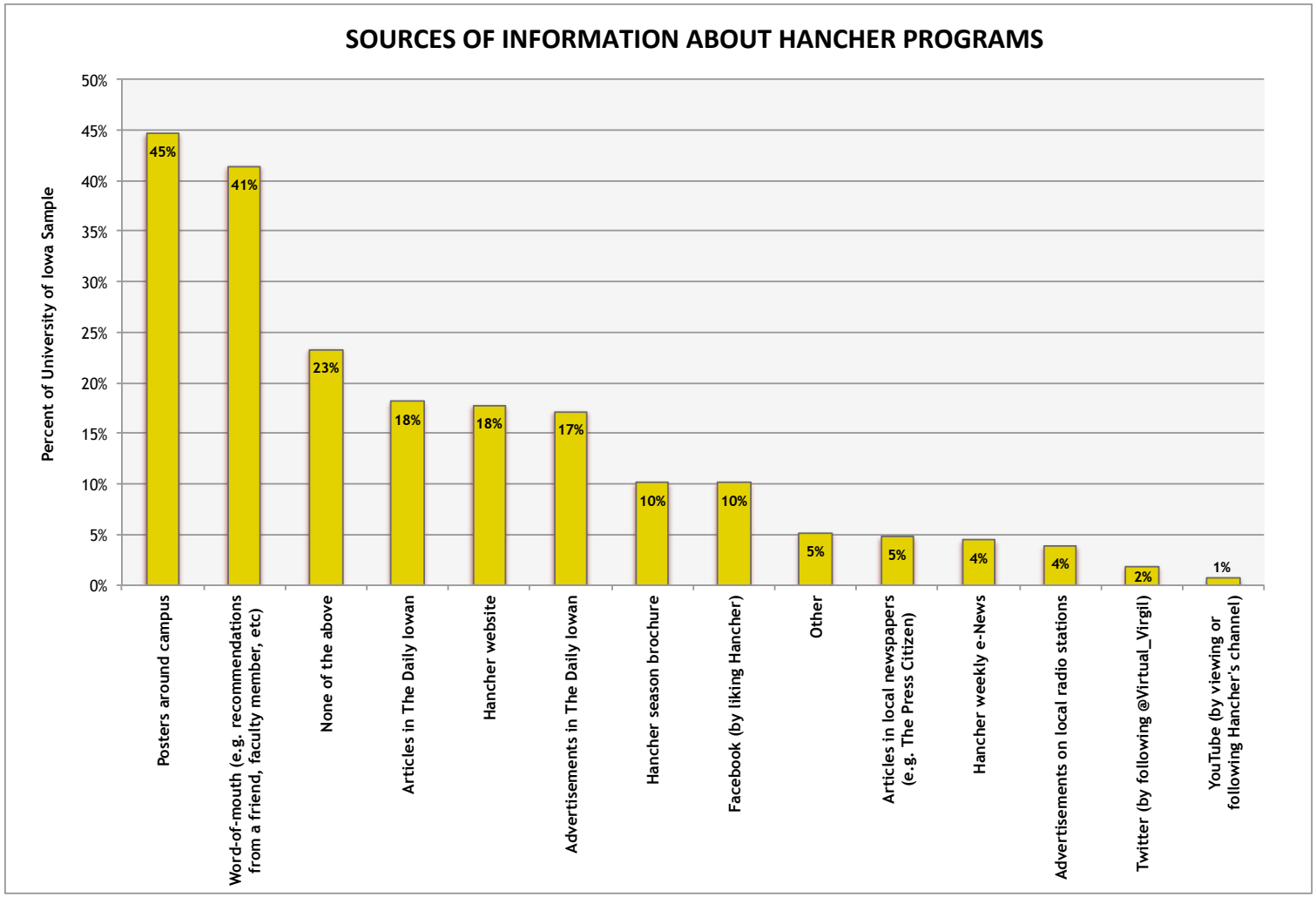
Sources of Information about UMS programs, Michigan respondents only



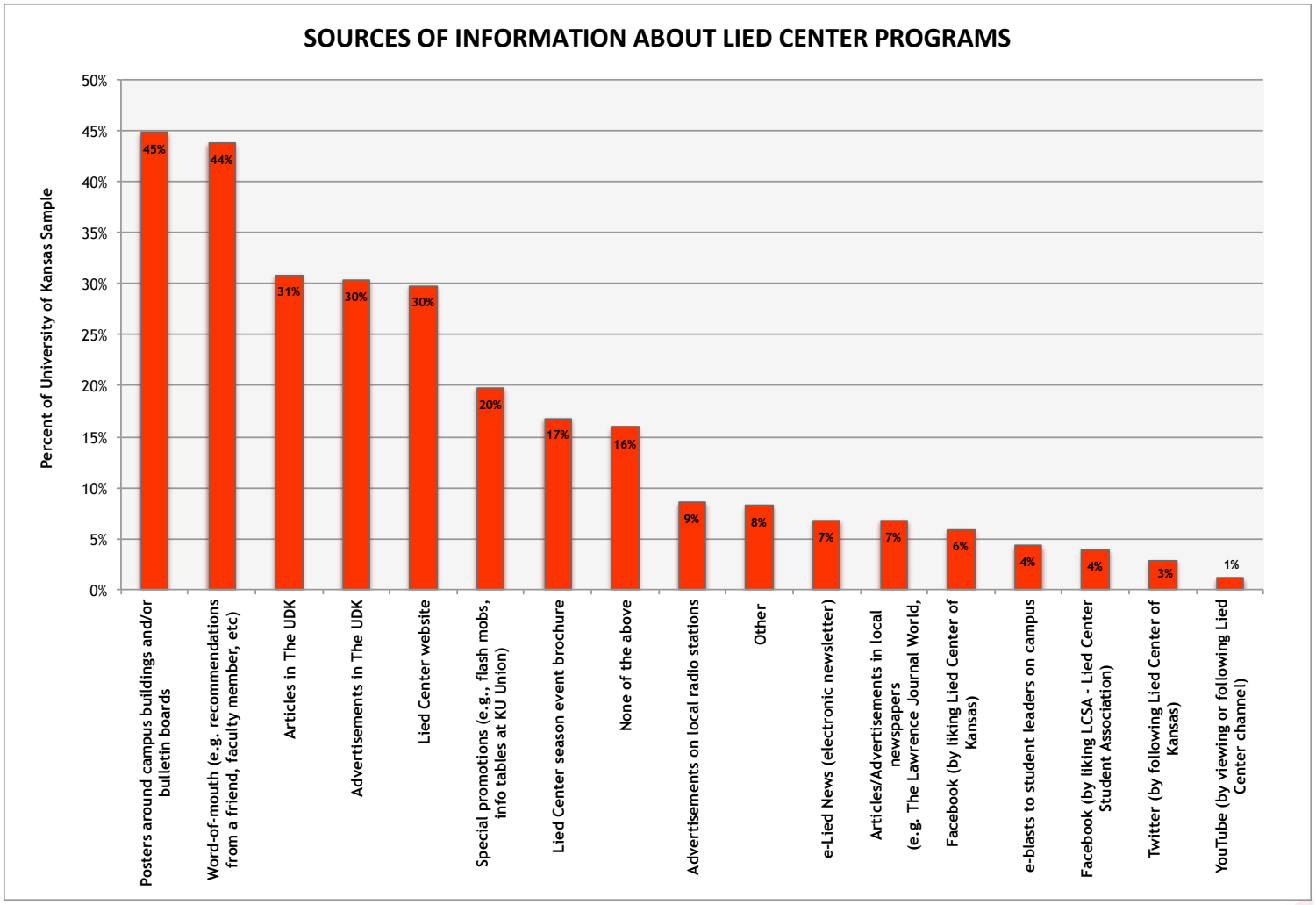
Sources of Information about Krannert Center programs, Illinois respondents only



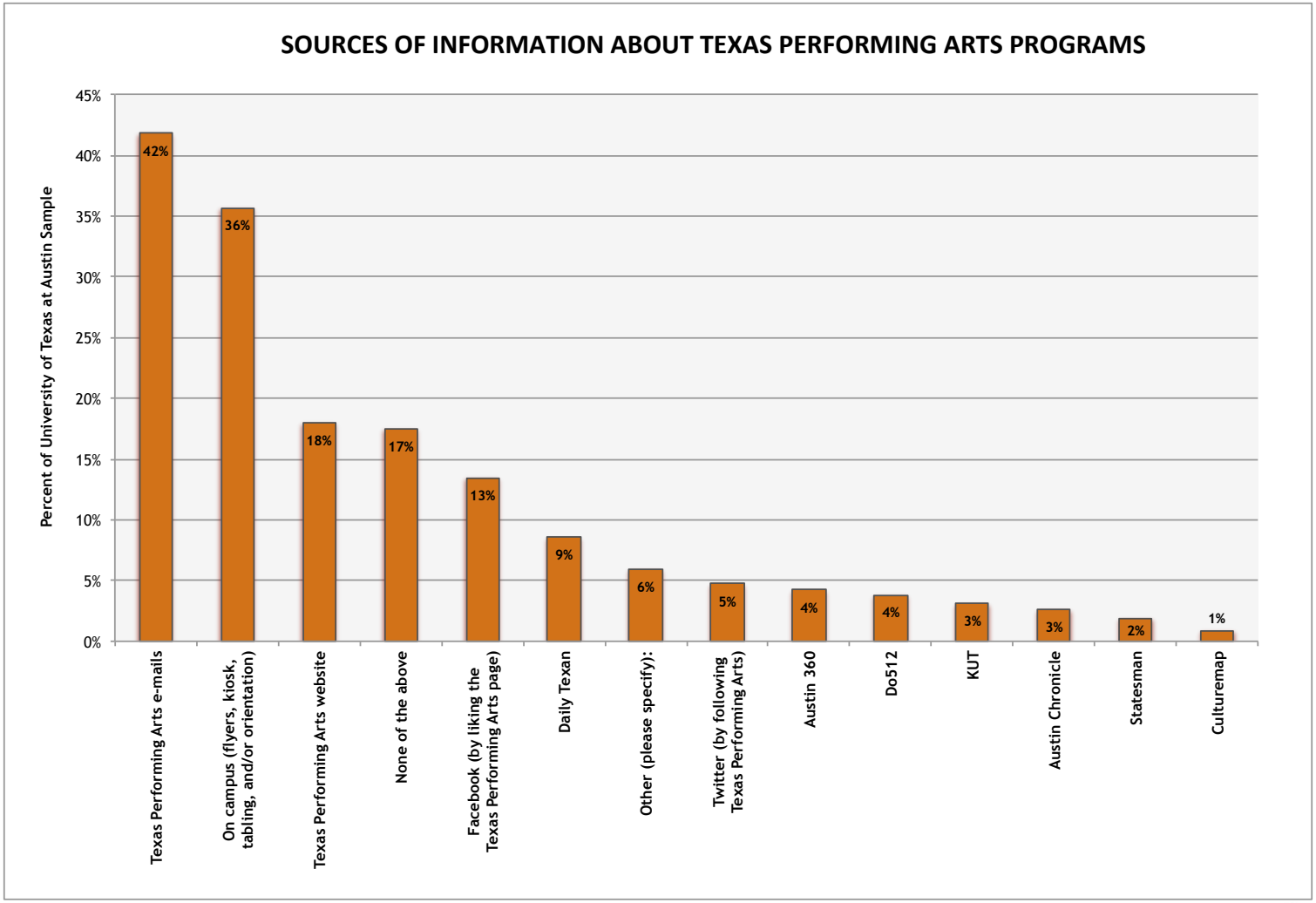
Sources of Information about Hancher programs, Iowa respondents only



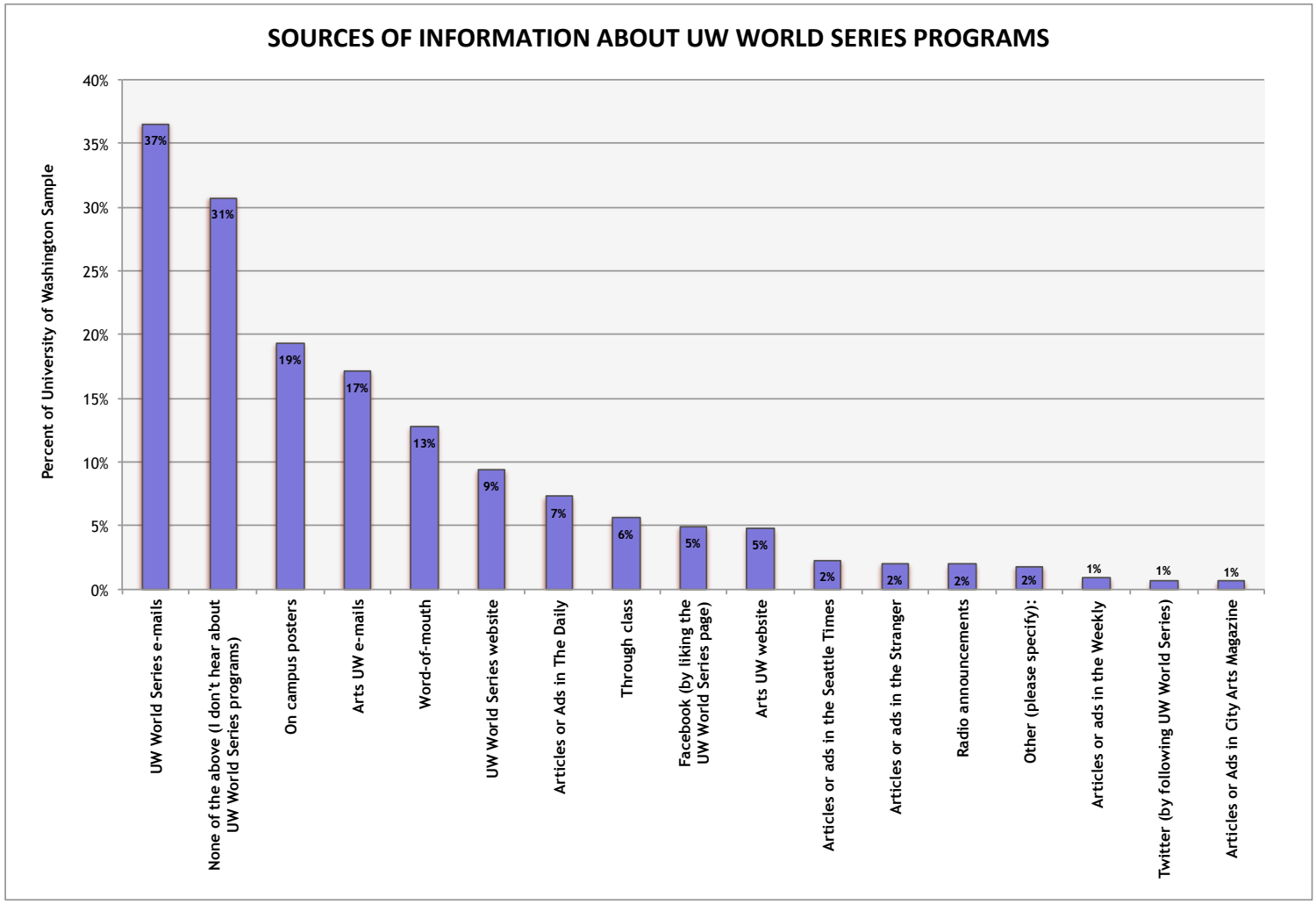
Sources of Information about Lied Center programs, Kansas respondents only



Sources of Information about Texas Performing Arts programs, Texas respondents only



Sources of Information about UW World Series programs, UW respondents only



Appendix 1: Survey Protocol

Survey of College Students' Music Preferences

Thank you for participating in the Survey of College Students' Music Preferences.

The survey takes approximately 10 minutes. Your answers are confidential, so please be as candid as possible.

Upon completion of the survey, you may print a coupon for a free medium drink of your choice at Espresso Royale.

If you do not have access to a printer upon completion of this survey, you will need to write down a unique coupon code upon completion and bring the code to the UMS Ticket Office, located on the north end of the Michigan League building (911 N. University Avenue) no later than October 15, 2012 to receive your coupon.

Let's get started…

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1. What is your present class or level of study? *

Freshman
Sophomore
Junior
Senior or extended undergraduate study

New Page

[Thank you for your interest in the survey.]

For each of the songs and musical works listed below, please indicate which of them you have previously listened to.

If you are unsure if you've heard a song or musical work, you may listen to the audio sample following each song. Please make sure your computer/mobile device's volume is turned on.

---

2. Have you previously listened to.....

- [ ] **So What** by Miles Davis

- [ ] **The Four Seasons** by Antonio Vivaldi
- [ ] **Enter Sandman** by Metallica
- [ ] **Symphony No. 6 (I. Allegro Ma Non Troppo)** by Ludwig van Beethoven
- [ ] **Skinny Love** by Bon Iver
- [ ] **The Rite of Spring** by Igor Stravinsky
- [ ] **Howlin' for You** by Black Keys
- [ ] **Stronger** by Kanye West
- [ ] **Come Together** by The Beatles
- [ ] **The Look of Love** by Diana Krall
- [ ] **Turn Me On** by DJ David Guetta featuring Nicki Minaj
- [ ] **Rolling in the Deep** by Adele
- [ ] **Tu Mirada** by Reik
- [ ] **Ordinary People** by John Legend
- [ ] **Party Rock Anthem** by LMFAO
- [ ] **Mississippi Girl** by Faith Hill
- [ ] **Izzo (H.O.V.A.)** by Jay-Z

Now, for each of the songs or musical works that you'd heard before today, please tell us how much you like or dislike the piece.

---

3. **Rolling in the Deep** by Adele

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

---

4. **Party Rock Anthem** by LMFAO

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like

○	○	○	○	○

5. **Turn Me On** by DJ David Guetta featuring Nicki Minaj

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

6. **Stronger** by Kanye West

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

7. **Izzo (H.O.V.A.)** by Jay-Z

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

8. **So What** by Miles Davis

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

9. **Mississippi Girl** by Faith Hill

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

10. **Enter Sandman** by Metallica

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

11. **Ordinary People** by John Legend

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

12. **The Four Seasons** by Antonio Vivaldi

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

13. **The Rite of Spring** by Igor Stravinsky

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

14. **Tu Mirada** by Reik

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

15. **The Look of Love** by Diana Krall

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

16. **Skinny Love** by Bon Iver

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

17. **Howlin' for You** by Black Keys

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

18. **Come Together** by The Beatles

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

19. **Symphony No. 6 (I. Allegro Ma Non Troppo),** by Ludwig van Beethoven

Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
○	○	○	○	○

20. **How do you discover new music artists?** (select all that apply)

- ☐ Recommendations made by your online social network (e.g. Facebook, Twitter, YouTube channels)
- ☐ Playlists created or recommended by an online interface (e.g. Spotify, TurnTable.fm, iTunes Genius)
- ☐ Personal recommendations made via direct communication (e.g. in-person, on the phone or email)
- ☐ Streaming music online (e.g. Pandora, last.fm radio)
- ☐ Listening to commercial or satellite radio
- ☐ Browsing in stores
- ☐ Local clubs or concert promoters
- ☐ Music reviews (e.g. blogs, HypeMachine.com, Pitchfork.com)
- ☐ Watching TV shows (e.g. MTV, The Voice, Glee), TV commercials, or from movie soundtracks
- ☐ Other sources or websites: _____

21. How much do you like listening to the following types of music? (Select one for each type of music)

	Strongly Dislike	Somewhat Dislike	Neutral	Somewhat Like	Strongly Like
Indie or alternative rock	○	○	○	○	○

Classic rock or oldies	○	○	○	○	○
Classical	○	○	○	○	○
Country	○	○	○	○	○
Hymns or Gospel	○	○	○	○	○
House/trance/electronic dance music	○	○	○	○	○
Contemporary rock and pop	○	○	○	○	○
Jazz or blues	○	○	○	○	○
Opera	○	○	○	○	○
Broadway musicals or show tunes	○	○	○	○	○
Rap or hip hop	○	○	○	○	○
Latin	○	○	○	○	○
World Music (music of different world cultures)	○	○	○	○	○

22. Is there another type of music that you like to listen to? If so, please specify the type of music:

Now, we'd like to ask you a few questions about classical music.

23. If a friend or family member had free tickets to a classical music concert and invited you to join them, would you go? (assuming that you are available and transportation is not a problem) *

- ○ Yes
- ○ No
- ○ Maybe

24. If you were going to attend a classical music concert, all else being equal, which type of venue would you most prefer? (select up to 3)

- ☐ A theater or concert hall
- ☐ A church or other place of worship

- [ ] A bar
- [ ] A coffee house or bookstore
- [ ] A club space or lounge-like atmosphere
- [ ] An outdoor park
- [ ] A museum or gallery space
- [ ] A restaurant
- [ ] Other (please specify): _____

---

25. Since being in college, have you attended at least one classical music concert by an orchestra, soloist, or chamber music group, by student or professional musicians? *

- ( ) Yes
- ( ) No

---

26. In general, how frequently do you attend classical music concerts by an orchestra, soloist, or chamber music group? (Choose one)

- ( ) Once a year or less
- ( ) A few times a year
- ( ) Almost monthly or more than once a month

---

27. For what reason(s) have you attended classical music concerts since being at college? (Mark all that apply)

- [ ] I like classical music
- [ ] A friend/family member invited me
- [ ] Someone told me about it and/or recommended it to me
- [ ] I knew someone who was performing
- [ ] I was curious
- [ ] I'm trying to broaden my horizons

- [ ] Required for class
- [ ] Date night
- [ ] Trying to impress someone
- [ ] Because I performed in the concert
- [ ] Other:

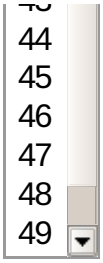
28. For what reason(s) have you not attended? (Mark all that apply)

- [ ] I don't like the music
- [ ] I don't know enough about classical music to enjoy it
- [ ] I can't drink at a concert
- [ ] I can't move around in a concert
- [ ] I'm too busy
- [ ] I don't have anyone to go with me
- [ ] I won't be able to meet new people my age there
- [ ] I can't text or use my phone
- [ ] Tickets cost too much
- [ ] I don't know about classical music events on my campus
- [ ] I can't talk to people during the concert
- [ ] Other:

Suppose that you learned that the following artists were going to play a concert on your campus. How much would you be willing to pay for a ticket to the concert (between $0 and $50)?

Vienna Philharmonic Orchestra

0
1
2



29. About how many of your friends listen to classical music? (Choose one)

None	Some	About half	A lot	All
○	○	○	○	○

30. How interested are you in learning more about classical music? (Choose one)

Not at all	Slightly	Somewhat	Very	Extremely
○	○	○	○	○

31. When you think of classical music, what words do you most strongly associate with it? (select all the apply)

☐ Snobby	☐ Beautiful	☐ Fun
☐ Entertaining	☐ Intense	☐ Noisy
☐ Unpredictable	☐ Boring	☐ Special
☐ Relaxing	☐ Creative	☐ Nostalgic
☐ Passionate	☐ Educational	☐ Stimulating
☐ Traditional	☐ Excellent	☐ Serious
☐ Elitist	☐ Energetic	☐ Impressive

Please tell us how much you agree or disagree with each of the following statements. *(choose one response for each question below)*

32. Learning about music, theater and dance is an important part of my college experience.

Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
○	○	○	○	○

33. I (would) feel uncomfortable at classical music concerts.

Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
○	○	○	○	○

34. I actively seek out and choose to listen to classical music.

Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
○	○	○	○	○

35. Classical music is not for me.

Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
○	○	○	○	○

36. During your high school years (in or out of school), how often did you participate in the following activities?

	Rarely or Never	Occasionally	Frequently
Band or orchestra	○	○	○
Choir or vocal ensemble	○	○	○
Theater	○	○	○
Dance	○	○	○
Visual arts	○	○	○
Crafts (e.g. weaving, knitting)	○	○	○

Now, please tell us about your current level of participation in the following activities.

37. Currently, how often do you participate in the following theater activities?

	Rarely or Never	Occasionally	Frequently
Take acting lessons or classes	○	○	○

Act in theater productions	○	○	○
Attend musicals by *professional* performers	○	○	○
Attend stage plays (non-musical) with *professional* actors	○	○	○
Attend musicals by *student* performers	○	○	○
Attend stage plays (non-musical) with *student* actors	○	○	○

38. Currently, how often do you participate in the following dance activities?

	Rarely or Never	Occasionally	Frequently
Take dance lessons or classes	○	○	○
Dance in a performance group	○	○	○
Social dancing at clubs or parties	○	○	○
Watch TV shows about dancing or dance competitions	○	○	○
Attend performances by *professional* dance companies	○	○	○
Attend performances by *student* dance companies	○	○	○

39. Currently, how often do you participate in the following music activities?

	Rarely or Never	Occasionally	Frequently
Compose or arrange music	○	○	○
DJ or make playlists for your friends	○	○	○
Take music lessons (any instrument or voice)	○	○	○
Sing in a vocal group or choir	○	○	○
Play music in a group such as a band or orchestra	○	○	○
Download or stream music from the Internet	○	○	○
Attend live concerts by *professional* singers or musicians (any style of music)	○	○	○
Attend live concerts by *student* singers or musicians (any style of music)	○	○	○

Watch TV shows about music or music competitions	○	○	○

40. Which of the following music activities are you interested in participating *more* than you currently do?

- [ ] Compose or arrange music
- [ ] DJ or make playlists for your friends
- [ ] Take music lessons (any instrument or voice)
- [ ] Sing in a vocal group or choir
- [ ] Play music in a group such as a band or orchestra
- [ ] Download or stream music from the Internet
- [ ] Attend live concerts by *professional* singers or musicians (any style of music)
- [ ] Attend live concerts by *student* singers or musicians (any style of music)
- [ ] Watch TV shows about music or music competitions

41. Are there any other creative activities that you currently participate in that have not been mentioned?

42. How do you find information about the programs offered by UMS? *

- [ ] UMS website
- [ ] UMS brochure
- [ ] UMS student mailer
- [ ] UMS Arts & Eats emails
- [ ] UMS Posters/Diag boards around campus
- [ ] Welcome Week activities (Artscapade/Festifall/Northfest)

- [ ] In-class visit from a UMS staff member
- [ ] Flyers/emails from Arts Ambassadors (the U-M Student Org)
- [ ] Facebook (by liking UMSNews)
- [ ] Twitter (by following UMSNews)
- [ ] YouTube (by viewing or following UMSVideos)
- [ ] Advertisements/Articles in The Michigan Daily
- [ ] Advertisements/Articles in local newspapers
- [ ] Advertisements/Announcements on local radio stations
- [ ] Word-of-mouth (e.g. recommendations from a friend, faculty member, etc)
- [ ] Other (please specify): _____
- [ ] None of the above

You chose "Advertisements/Articles in local newspapers" in the question above. Please tell us which local newspaper you use most often to find information about the programs offered by UMS. (select one)

- ○ AnnArbor.com
- ○ Metro Times
- ○ Detroit News/Free Press
- ○ Ann Arbor Observer
- ○ Current
- ○ iSPY

You chose "Advertisements/Announcements on local radio stations" in the question above. Please tell us which local radio station you use most often to find information about the programs offered by UMS. (select one)

- ○ Michigan Radio 91.7 FM
- ○ WCBN 88.3 FM

- WEMU 89.1 FM
- WDET 101.9 FM
- WGTE FM 91
- WRCJ 90.9 FM
- AnnArbor's 107one FM

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43. UMS offers discounted student ticket programs. Mark the programs below that you were aware of before today. *

- [ ] Half-off Student Tickets to almost every performance on the UMS season (subject to availability)
- [ ] $10 Student Rush Tickets available the day of the performance at the Michigan League(or the Friday before weekend performances)
- [ ] $20 Student Rush Tickets at the door
- [ ] $15 Arts & Eats ticket (includes pre-show pizza dinner, activity, and performance)
- [ ] Passport to the Arts program through Arts@Michigan.
- [ ] I was not aware of any program before today

To finish, please tell us a little about yourself. Your answers will be kept anonymous.

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44. Which of the following best describes your area of study?

Agriculture, Farming or Veterinary Medicine
Business or Management
Communications
Dance
Education
Engineering
Journalism
Pre-Law
Pre-Med
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
Theater
Visual Art, Design or Architecture
Undecided

45. Your gender?

- Female
- Male

46. Your age?

Under 18
18
19
20
21
22
23
24

47. Do you consider yourself Hispanic or Latino? (select one)

- Yes
- No

48. Which of the following best describes your race? (select all that apply)

- [ ] African American or Black
- [ ] Asian American or Asian
- [ ] White
- [ ] Native American, American Indian or Alaska Native
- [ ] Native Hawaiian or other Pacific Islander
- [ ] Multi-racial or other race

49. Which of the following best describes the area where you grew up? (select one)

- ○ Urban
- ○ Suburban
- ○ Small City
- ○ Rural

Thank you for answering our questions!

Click "Next" to complete the survey.

New Page

Thank you for completing our survey. Before clicking 'submit,' please print this coupon or write down your unique code to redeem your free medium drink. If you do not have access to a printer upon completion of this survey, you will need to write down the coupon code upon and bring it to the UMS Ticket Office, located on the north end of the Michigan League building (911 N. University Avenue) no later than October 15, 2012 to receive your coupon.

Free Medium Drink of Your Choice

Please wait...

Thanks for participating in the UMS Survey! Print & redeem this coupon for one free medium drink of your choice at either of the following participating locations:

Espresso Royale - State Street
324 S. State St.
Ann Arbor, Michigan 48104

Espresso Royale - South U
1101 S. University St.
Ann Arbor, Michigan 48104

Fine Print: Medium Drink options exclude OJ and Smoothies. Expires: 11.21.12

Thank you for responding to the survey.