



Scottsdale Cultural Census

Research Commissioned by the
Scottsdale Cultural Council

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Executive Summary

- In May and June, 2007, a total of 2,431 Scottsdale area adults completed a comprehensive survey about their cultural attitudes and involvement. Although diverse patterns of participation were observed, the sample was not random and results are not representative of the general population. Rather, results should be used to compare patterns of participation across various subgroups of respondents. Generally, respondents can be characterized as culturally active adults. Results of the survey effort, along with results from the focus groups and other research, provide a rich context to the Scottsdale Cultural Council's deliberations about alternatives for future cultural development.
- For the purposes of analysis, respondents were grouped into three categories based on their combined frequency of attendance at performing arts programs and art museums and galleries:
 - **Higher-frequency attendees** are the most active cultural consumers. Most attend both performing arts programs and art museums and galleries 10 times a year or more. They tend to be older and have very high levels of educational attainment and income.
 - **Moderate frequency attendees** generally attend performing arts programs and art museums and galleries between three and 10 times a year, although some prefer one over the other.
 - Most **lower-frequency attendees** go out to arts programs five times a year or less. A small percentage of them reported no attendance in the past year, although most reported attending performing arts programs and art museums and galleries once or twice. They are more likely to be younger and represent a broader cross-section of the public with respect to income and education.
- In reference to patterns of use of various arts facilities in the Valley, results were analyzed for Scottsdale residents only. After SCPA, the three most frequently attended venues are Symphony Hall, the Herberger Theater and Gammage Auditorium, indicating that many Scottsdale residents take advantage of programs offered by a variety of venues. Among the subset of respondents who attended SCPA at least once in the past year, 47% also attended the Mesa Arts Center at least once in the last year, while 20% attended Mesa three or more times. Overall, results suggest the dynamic and competitive nature of the market.
- With respect to visiting art museums, nearly equal percentages of Scottsdale respondents reported attending SMOCA as did the Phoenix Museum of Art.
- The vast majority of respondents, even those in the lower-frequency cohort, experience Scottsdale's public art at least occasionally.



Summary of Findings - Continued

- The most significant reasons given by respondents for not attending SCPA more often were: 1) “not interested in what’s offered,” 2) “too busy,” and 3) “too expensive.” For SMOCA, the top barriers were: 1) “not interested in what’s offered,” 2) “too busy,” and 3) “not aware of what’s going on.” While results point to the potential to reach more residents through more sophisticated and more targeted promotional efforts, one also sees in the data a “resonance gap” with respect to programming. This gap may be attributed in part to the nature of the community, changing cultural tastes and the economic limitations of these facilities. It also suggests the need for greater leadership and investment in drawing audiences into arts experiences that are beyond the mainstream.
- Respondents were asked to indicate their level of involvement in, or the **centrality** of, a wide range of specific arts activities. For each activity, five response items were available: 1) it’s a vital activity for me, 2) I enjoy it occasionally, 3) I used to, but don’t any longer, 4) I haven’t, but would like to try, or 5) I’m not interested. Across the performing arts disciplines, attendance at live performances is far and away the most common means of experiencing the art forms, although respondents reported significant levels of unfulfilled interest in other forms of participation.
 - Among the music activities tested, respondents were most likely to cite “attending live concerts” as “a vital activity” (40%).
 - Attending live stage plays and musicals was cited as “a vital activity” by about 30% of all respondents, and over half said that they ‘enjoy it occasionally.’ A quarter of respondents in the lower-frequency cohort expressed unfulfilled interest in attending dinner theatre.
 - Among the dance activities tested, about four in ten respondents indicated that they enjoy attending various types of dance performances at least occasionally, though few report any sort of dance attendance as “a vital activity.” About a third of all respondents enjoy social dancing at least occasionally, and fully one quarter indicated an unfulfilled interest in “taking lessons or classes” - a participatory and socially-based form of engagement.
 - About 45% of all respondents enjoy “downloading music from the Internet” at least occasionally, the second most central of all the music activities tested, suggesting a shift from observational to curatorial participation in music. This shift is significantly correlated to age.
 - The centrality of curatorial participation in visual art and crafts (i.e., “collect art or decorations for your home” - 34% “vital”) exceeds that of observational participation (i.e., visiting art museums and galleries - 22% “vital”), again illustrating the high value that some residents place on active, personal involvement. “Read books or watch programs about art, architecture and design” also tested very highly (24% “vital”).
 - “Doing cultural activities while traveling” is the most popular of the other cultural activities tested (approximately 84%), while “taking photographs” is at least an occasional activity for about 83% of all respondents - reflecting the explosion of interest in digital photography.



Summary of Findings - Continued

- Significant differences in patterns of cultural engagement were observed across age cohorts. Younger respondents, for example, are more likely to engage with culture through inventive, interpretive and curatorial forms of participation such as downloading and organizing music, making videos, and dancing socially. And they are substantially more interested than their older counterparts in acquiring new artistic skills such as taking dance lessons and taking lessons in visual art and crafts.
- As would be expected, respondents in the youngest age cohort (18-34) were far more likely to report preferences for hip hop dance and more popular music artists, while respondents in the 65+ age cohort reported significantly higher preferences for classical music and ballet. It is interesting to note that jazz appeals equally to respondents in all age cohorts. Overall, results point to generational shifts in cultural tastes, and suggest the challenges associated with programming and marketing to audiences with increasingly eclectic tastes and different social agendas.
- In general, results from the module of questions pertaining to cultural engagement are consistent with national trends that point to increased demand for more engaging arts experiences, including more active forms of participation – making art, talking about art, collecting and organizing art, residencies, etc. The survey indicates demand for arts programs and facilities that fulfill social needs as well as accommodate arts programs, especially among younger respondents and those with weaker ties to the arts.
- Informal venues – including the home, bars and clubs, coffee shops, etc. – play an important role as settings for arts and cultural activities, especially among lower-frequency attendees. With the proliferation of convenient, comfortable and high quality settings for art activities, this and other research suggests that consumers attach more importance to setting, generally.



Summary of Findings - Continued

- Respondents were asked “What would make Scottsdale’s cultural life more appealing to you?” and asked to pick three from a list of nine alternatives. Overall, the top priorities were 1) “Build a covered, outdoor amphitheatre to host music, theatre and dance performances” and 2) “Build a larger performing arts center to accommodate more prominent performers.”
 - Respondents in the lower- and moderate-frequency cohorts were significantly more likely to prioritize the outdoor amphitheatre concept, suggesting a generally broader appeal to the amphitheatre concept, however vaguely it was presented. Also, respondents in the lower-frequency cohort were relatively more likely to prioritize “opportunities to take lessons and classes to develop my own creative interests” and “arts education facilities for children and adults available in neighborhoods.”
 - Several priorities were substantially more salient for younger respondents, including “Provide more opportunities to take lessons and classes to develop my own creative interests” and “Build a facility for making and watching independent film or video.” Younger respondents were also more likely to prioritize “Extend gallery hours and offer performances at more convenient times.”
 - Overall, results from this question should be taken only as a general indication of the types of facilities and program concepts that different groups of constituents will find more or less appealing. The overall picture is that older respondents and those who are already frequent arts attendees will support the development of traditional arts facilities (both visual and performing arts), while younger and more diverse respondents and those with weaker ties to the arts will prioritize informal facilities and programs with an emphasis on participatory forms of engagement.
- In sum, results of the cultural census paint a detailed picture of how Scottsdale area residents express themselves creatively, and the many ways that they participate in the arts. A healthy cultural system supports artistic development at all levels, including arts education for children and adults, amateur participation for adults, and professional presentations and exhibitions.
- For arts organizations, there are many implications and challenges. These include offering shorter and more intense, customized and participatory experiences, but also finding ways to be relevant to constituents in a range of settings, including the home and other non-traditional settings where a great deal of meaningful arts activities happen, according to the findings.



Survey Methodology & Response

- The Scottsdale Cultural Census was conducted in 2007 as part of a larger community cultural assessment commissioned by the Scottsdale Cultural Council and conducted by WolfBrown.
- The overall purpose of the research was to gain a clearer sense of how residents of the Scottsdale area engage with culture, including programs offered by the Scottsdale Center for the Performing Arts (SCPA) and the Scottsdale Museum of Contemporary Art (SMoCA).
- All adults (age 18+) who are residents of the Scottsdale area (not just limited to the City of Scottsdale) were eligible to participate in the survey. The time window for survey response lasted from May 15 to June 22, 2007.
- The primary method of data collection was through an online survey. Paper copies of the survey were also available for those without Internet access, along with postage paid reply envelopes.
- Both the online and paper versions of the survey were available in Spanish as well as English.
- Promoting participation in the survey was the responsibility of the Scottsdale Cultural Council.
- A range of recruitment methods were used to encourage response, including broadcast emails to patrons of local organizations and distribution of paper surveys by a crew of survey coordinators.
- Respondents who indicated that they are under 18 years of age or who had taken the survey more than once were excluded from the data set. After these adjustments, the final data set includes a total of 2,431 valid responses.
- The data set includes 1,323 residents of the City of Scottsdale (54%) and 1,108 residents of the surrounding area (46%), allowing for analysis of Scottsdale vs. non-Scottsdale residents.



Weighting and Limitations of the Data

- The approach to data collection did not involve random sampling, and the results are not designed to be representative of the general population of Scottsdale residents. Instead, respondents self-selected into the study, and the goal was to obtain as many responses as possible from a cross-section of adults.
- Respondents to surveys of this nature tend to be those with a pre-existing interest in the subject matter (i.e., arts and culture). This is called ‘bias from self-selection.’
 - The primary manifestation of this bias is in higher levels of educational attainment among survey respondents, compared to all adults in the area. For example, 45% of respondents who are Scottsdale reported having earned a Graduate Degree, which compares to 15% of all Scottsdale residents (2000 census).
- To offset this bias, weights were applied to adjust the levels of educational attainment in the survey data to actual education levels in the base population (using census data). Thus, responses from those who reported lower levels of educational attainment (i.e., high school graduate, some college) received higher weights, while responses from those who reported the highest levels of educational attainment (i.e., graduate study) received lower weights. In the graphs and tables that follow, all results are weighted, except as noted.
- While the use of weights partially offsets the bias from respondent self-selection, there are other forms of bias in the data, including bias from under-representation of those without Internet access, even though a paper version of the survey was available.
 - In comparison to the base population, the data set slightly over-represents Scottsdale residents in the highest age cohort (65+) and significantly under represents those in the youngest age cohort (18-34).
 - In comparison to the base population, the data set significantly under-represents Scottsdale residents in the lowest income cohort and significantly over-represents those with high incomes.
- In light of these limitations, the reader is cautioned not to use the survey data to generalize about all Scottsdale residents. Rather, the data should be used to characterize differences between cohorts.



Definition of Analysis Groups

- To facilitate analysis, respondents were classified into one of three frequency cohorts based on their aggregated responses to the following two questions:
 - How often do you attend art museums or galleries, on an annual basis?
 - How often do you attend ticketed live performing arts programs, on an annual basis?
- Throughout the report, results are analyzed by these three frequency cohorts:

	<u>Unweighted %</u>	<u>Weighted %*</u>
1) Higher frequency attendees	28%	23%
<ul style="list-style-type: none"> - Higher-frequency attendees are the most active cultural consumers. Most attend both performing arts programs and art museums and galleries 10 times a year or more. They tend to be older and have very high levels of educational attainment and income. 		
2) Moderate frequency	37%	37%
<ul style="list-style-type: none"> - Moderate frequency attendees generally attend performing arts programs and art museums and galleries between three and 10 times a year, although some prefer one over the other. 		
3) Lower frequency attendees	35%	40%
<ul style="list-style-type: none"> - Most lower-frequency attendees go out to arts programs five times a year or less. A small percentage of them reported no attendance in the past year, although most reported attending performing arts programs and art museums and galleries once or twice. They are more likely to be younger and represent a broader cross-section of the public with respect to income and education. 		

*weighted to actual educational attainment levels in the base population

- When appropriate or illustrative of significant differences, results are also analyzed by age cohort and for Scottsdale vs. non-Scottsdale residents





Profile of Respondents



Demographics (Unweighted Data)

RESPONDENT DEMOGRAPHICS BY ATTENDANCE COHORT (UNWEIGHTED DATA)	Higher Freq. Attendees (n=853)	Moderate Freq. Attendees (n=898)	Lower Freq. Attendees (n=680)
Gender			
Female	69%	69%	71%
Male	31%	31%	29%
Age			
18-34	9%	12%	16%
35-44	10%	17%	16%
45-54	20%	22%	28%
55-64	32%	28%	26%
65+	29%	21%	14%
Educational Attainment			
High School	1%	2%	4%
Some College	19%	22%	25%
Earned a College Degree	26%	31%	34%
Graduate Study	54%	44%	37%
Race/Ethnicity			
African American	1%	1%	2%
Asian American	1%	1%	2%
Hispanic/Latino	2%	3%	3%
White, not Hispanic	93%	91%	90%
Native American	0%	1%	0%
Mixed Race or Other	3%	2%	2%
Living Situation			
Married or Partnered	64%	63%	61%
Single - Never Married	13%	16%	17%
Previously Married or Partnered	23%	21%	22%
Presence of Children in the HH			
Yes	10%	15%	22%
No	90%	85%	78%

- Approximately 69% of all respondents are female, which is typical for surveys of this nature.
- With respect to age, one can observe clear differences between cohorts. Higher-frequency attendees are more than twice as likely as lower-frequency attendees to be over age 65 (29% vs. 14%). Conversely, lower-frequency attendees are likelier to be younger (32% under age 45, vs. 19% for higher-frequency attendees).
 - Results illustrate the challenges associated with gaining the participation of younger adults in attendance-based arts activities
- A strong correlation between frequency of attendance and educational attainment is apparent (remember that almost all survey respondents, even those in the lower-frequency cohort, may be considered to be “culturally active.”)
- A significant difference was observed with respect to presence of children in the household (22% of low-frequency vs. 10% of higher frequency attendees), indicating that many parents attend arts events at significantly lower frequency rates than adults without children.
- Just over 90% of respondents are white, which compares to a figure of approximately 85% for Scottsdale, based on the 2007 demographic estimates.



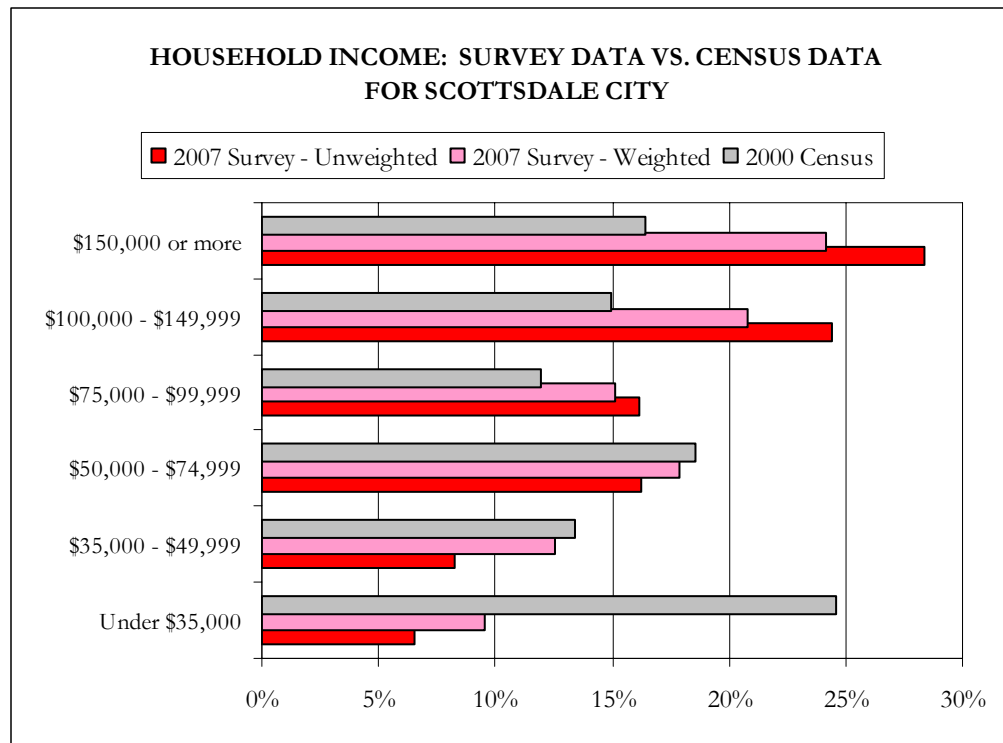
Demographics, continued (Unweighted Data)

RESPONDENT DEMOGRAPHICS BY ATTENDANCE COHORT (UNWEIGHTED DATA)	Higher Freq. Attendees (n=853)	Moderate Freq. Attendees (n=898)	Lower Freq. Attendees (n=680)
Annual Household Income			
Under \$35,000	5%	8%	11%
\$35,000 to \$49,999	7%	12%	10%
\$50,000 to \$74,999	17%	19%	19%
\$75,000 to \$99,999	17%	16%	18%
\$100,000 to \$149,999	23%	23%	23%
\$150,000 or more	32%	22%	18%
Area of Residence			
Scottsdale	55%	54%	55%
Surrounding Area	45%	46%	45%
Length of Residence			
A year or less	3%	2%	3%
1 or 2 years	5%	4%	4%
3 to 5 years	10%	11%	10%
6 to 10 years	16%	16%	17%
11 to 20 years	24%	26%	24%
More than 20 years	42%	40%	42%
Seasonal Residence			
The full year	95%	92%	95%
9 to 11 months per year	1%	3%	1%
6 to 8 months per year	1%	3%	1%
Less than 6 months per year	3%	2%	3%
Voted in Last Election			
Yes	94%	90%	89%
No	6%	10%	11%

- The unweighted demographic data illustrates how income levels also correlate with frequency of attendance, suggesting that price sensitivity is a barrier to participation in ticketed events.
- Each of the frequency groups has approximately the same proportion of Scottsdale residents vs. non residents.
- Length of residence data brings to light another bias in the data set: respondents with longer tenures as Scottsdale residents were more likely to complete the survey. Almost two-thirds of respondents indicated that they've lived in Scottsdale for more than ten years. Information obtained through the key informant interviews suggest that the average length of residence for all Scottsdale residents is between five and ten years.
- Civic engagement follows predictable patterns, with higher-frequency respondents being slightly more likely to have voted in the last election. Although we are not aware of the actual figure for all Scottsdale residents, but it seems safe to assume that survey respondents are, most likely, more civically-engaged than non-respondents.



Affect of Weighting on Income and Ethnicity

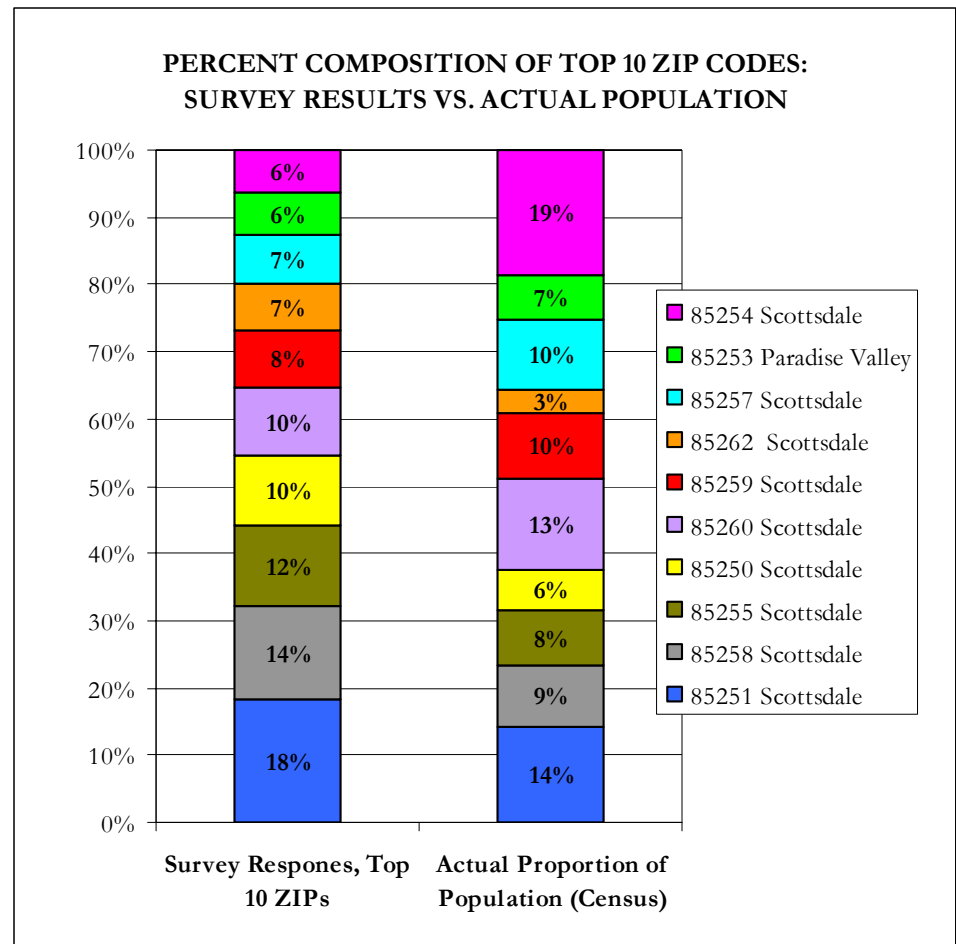


- The chart at left compares weighted and unweighted income data with estimated 2007 income data for all Scottsdale households, obtained from Claritas.
- Residents in the lowest income cohort are significantly under-represented in the sample, while residents in the highest two income cohorts are significantly over-represented in the sample.
 - Even after weighting for educational attainment, the skew toward higher income levels in the sample persists.
- Weighting had minimal affect on the ethnic composition of the sample.

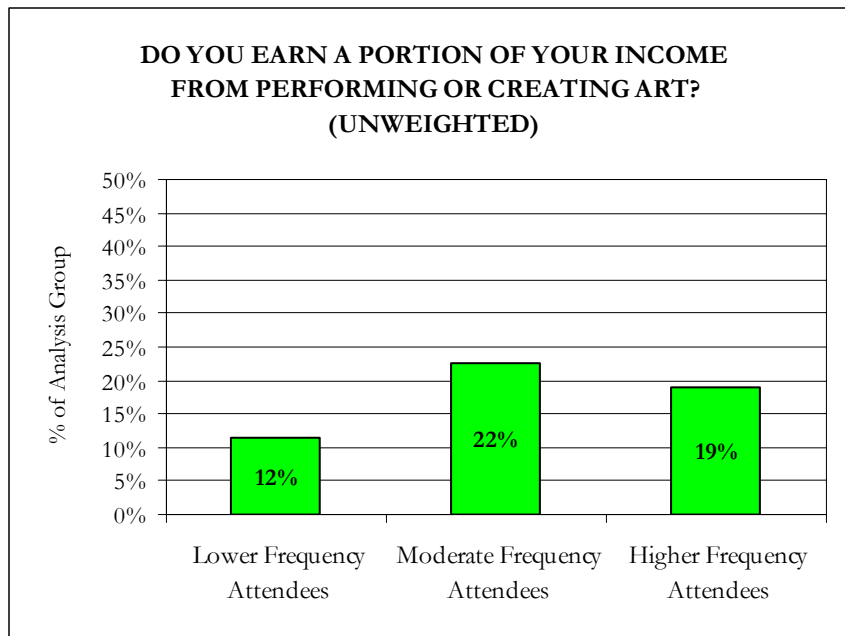


Respondent Home ZIP Code

- The chart at right compares the top ten ZIP Codes of survey respondents (unweighted data) with the actual number of households in each ZIP Code, in order to see which ZIPs are over- or under-represented in the survey data.
- ZIP Codes 85251, 85258, 85255, 85250 and 85262 are over-represented in the sample, while the remainder of the top ten reported ZIP Codes are under-represented in the sample, particularly 85254.
 - The variances most likely relate to the underlying education levels in these ZIP codes (i.e., ZIP Codes with higher education levels are more likely to be over-represented in the sample)



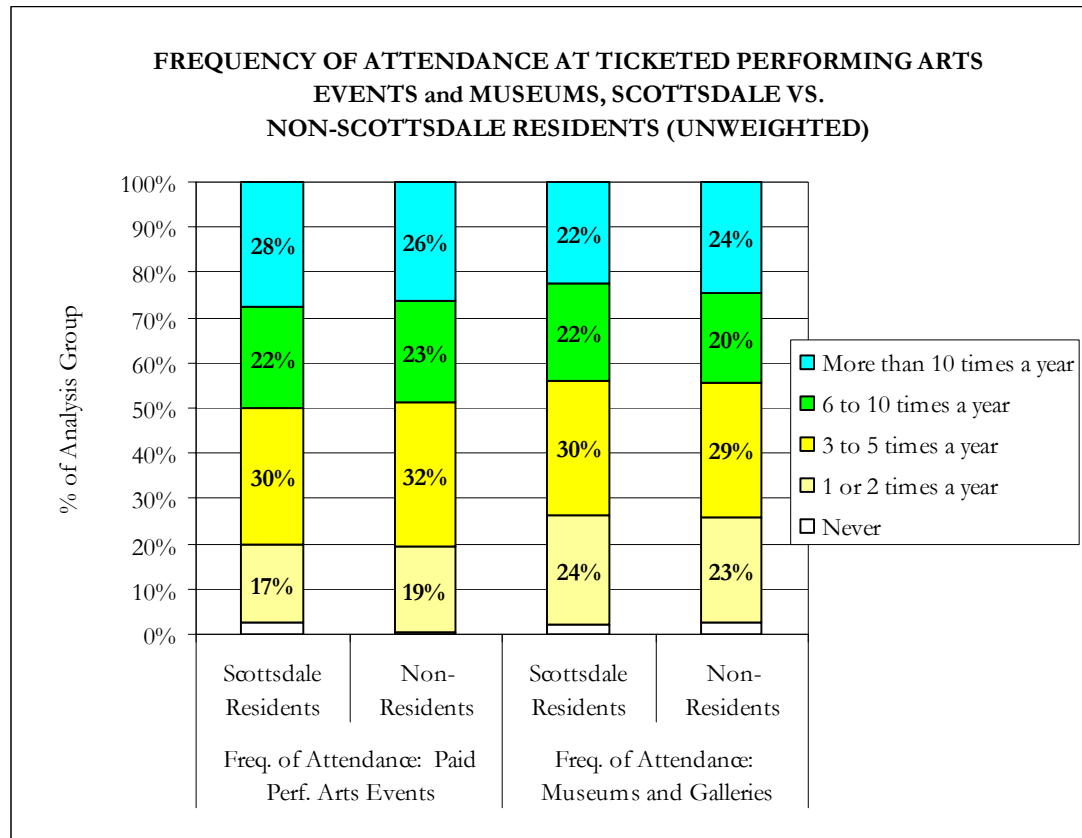
Incidence of Working Artists in the Sample



- In order to ascertain the presence of working artists in the sample, respondents were asked if they earn a portion of their income “from performing or creating art.”
- Results illustrate a correlation between personal participation in the arts as an artist and frequency of attendance at museums and performing arts programs.
 - While the overall proportion of artists in the sample seems high (i.e., indicative of a bias in the sample towards artists), these results also point to a correlation between arts practice and arts attendance. Holding the bias constant, moderate and higher-frequency attendees are significantly more likely to be practicing artists, suggesting that encouraging personal participation in the arts can be a long-term strategy for audience development.



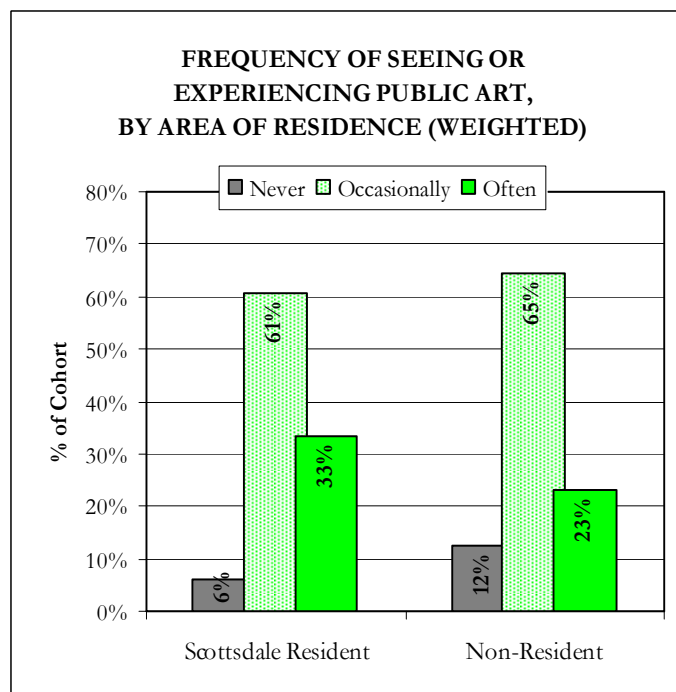
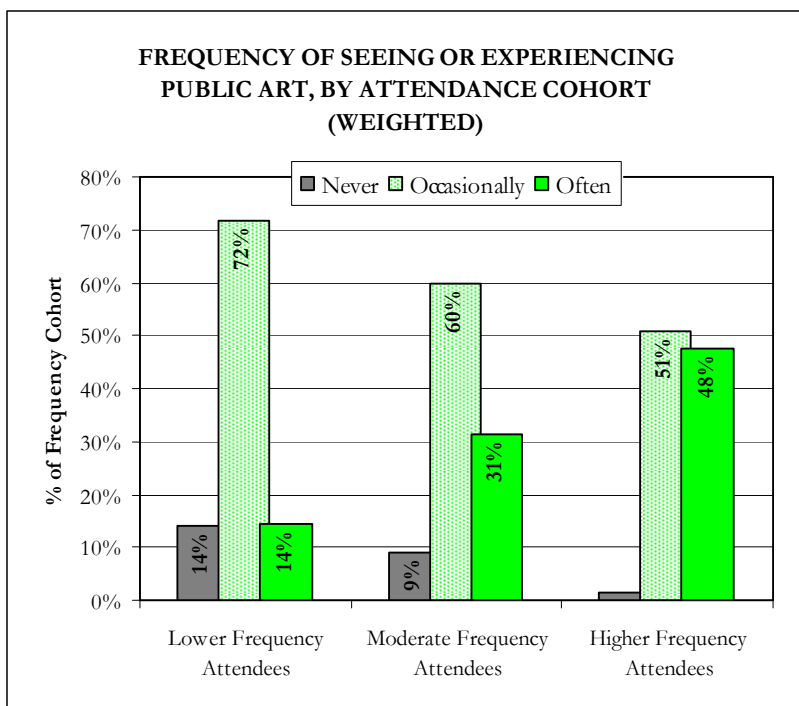
Frequency of Attendance: Scottsdale Residents vs. Residents of the Surrounding Area



- Approximately half of all respondents reported attending performing arts events at the rate of six or more times per year, and museums at a slightly lower rate.
- Low-frequency attendees (0, 1 or 2 times a year) account for 20% to 25% of all respondents, with very few reporting no frequency at all.
- Overall, Scottsdale residents reported nearly identical frequency of attendance compared to non-residents.
- Reported frequency of attendance at ticketed performing arts events (all disciplines) is only slightly higher than frequency of attendance at museums and galleries, which is atypical for surveys of this nature. This might be influenced by the large number of galleries in Scottsdale, which would tend to drive up the figure for attendance at “art museums and galleries.”
 - Overall, the reported frequency levels illustrate that the sample generally represents culturally active adults



Frequency of Experiencing Public Art



- Respondents were asked to indicate how often they “see or experience Scottsdale’s public art installations.” Overall, 94% of Scottsdale respondents see or experience public art installations at least “occasionally.”
- A close correlation was observed between respondents’ frequency of attendance and their experience with public art. Respondents in the higher frequency cohorts were three times more likely than those in the lower frequency cohort to report that they “often” see or experience public art (48% vs. 14%, respectively). How much of this is due to their physical travel patterns to arts facilities vs. their generally higher level of awareness of public art is not known.



Use of Different Venues and Settings for Arts Activities

% CITING DIFFERENT VENUES AS PLACES WHERE THEY "REGULARLY DO CREATIVE AND CULTURAL ACTIVITIES," BY ATTENDANCE COHORT (WEIGHTED)	Lower Freq. Attendees	Moderate Freq. Attendees	Higher Freq. Attendees
Theaters and concert halls	63%	76%	89%
Art museums	46%	64%	85%
Commercial Art Galleries	21%	39%	64%
Your home	61%	57%	53%
Outdoor facilities and parks	47%	48%	46%
Libraries and book stores	30%	28%	43%
Natural history and historic museums	24%	31%	38%
University and community college facilities	19%	29%	33%
Community centers	17%	21%	20%
Places of worship	15%	18%	19%
Bars and clubs	11%	13%	16%
Public and private school facilities	17%	15%	16%

- Respondents were asked to indicate the various venues and settings, both traditional and non-traditional, where they do arts activities. As would be expected, incidence of use of most types of venues and settings is generally lower for lower-frequency attendees. However, several interesting patterns are noted.
 - Theaters and concert halls are the dominant settings among all frequency groups, followed in the moderate- and higher-frequency groups by art museums.
 - Compared to higher-frequency attendees, respondents in the lower- frequency cohort are significantly more likely to utilize informal settings, especially the home, as well as outdoor facilities and parks.
- The home is a key setting for arts activities for most respondents
 - Many people invest great sums in making their homes into private arts facilities: "My living room is an opera house, my bedroom is a cinema, my kitchen is an art gallery." How can Scottsdale's future cultural policy stimulate arts participation in the home?
- Overall, results here point to one of the fundamental challenges facing arts organizations nationally, which is how to be relevant to constituents in a range of settings, both formal and informal.



Use of Different Venues and Settings, by Income Cohort

% CITING DIFFERENT VENUES AS PLACES WHERE THEY "REGULARLY DO CREATIVE AND CULTURAL ACTIVITIES," BY HOUSEHOLD INCOME (WEIGHTED)	HOUSEHOLD INCOME					
	Under \$35,000 (n=242)	\$35,000 to \$49,999 (n=280)	\$50,000 to \$74,999 (n=448)	\$75,000 to \$99,999 (n=317)	\$100,000 to \$149,999 (n=429)	\$150,000 or more (n=407)
Your home	64%	56%	58%	58%	56%	55%
Places of worship	21%	13%	15%	18%	15%	16%
Community centers	16%	13%	23%	21%	19%	16%
University and community college facilities	31%	28%	21%	22%	28%	27%
Public and private school facilities	12%	14%	17%	16%	19%	19%
Bars and clubs	13%	18%	12%	15%	14%	12%
Libraries and book stores	29%	36%	43%	28%	31%	23%
Theaters and concert halls	58%	65%	78%	71%	81%	80%
Art museums	56%	62%	59%	55%	71%	64%
Natural history and historic museums	26%	33%	32%	26%	34%	25%
Commercial art galleries	25%	29%	37%	35%	43%	47%
Outdoor facilities and parks	47%	47%	51%	48%	47%	44%

- Respondents with lower household income levels are relatively less likely to use theaters and concert halls, and relatively more likely to use the home as a setting for arts activities.
 - For example, respondents in the Under \$35,000 income cohort reported the highest incidence of use of some informal settings, including the home and places of worship.
- Respondents in the moderate income cohorts were more likely to report use of libraries and book stores as settings for arts activities.
- Respondents in the highest income cohort (\$150K+) were most likely to report using commercial galleries



Use of Different Venues and Settings, by Income Cohort

% CITING DIFFERENT VENUES AS PLACES WHERE THEY "REGULARLY DO CREATIVE AND CULTURAL ACTIVITIES," BY HOUSEHOLD INCOME (WEIGHTED)	AGE COHORT				
	18-34	34 - 44	45 - 54	55 - 64	65 - 74
Your home	66%	67%	61%	57%	60%
Places of worship	10%	15%	21%	18%	24%
Community centers	13%	20%	19%	16%	21%
University and community college facilities	34%	28%	34%	33%	31%
Public and private school facilities	17%	29%	20%	13%	10%
Bars and clubs	34%	21%	12%	7%	4%
Libraries and book stores	25%	37%	34%	39%	39%
Theaters and concert halls	64%	69%	76%	80%	82%
Art museums	63%	60%	62%	71%	73%
Natural history and historic museums	21%	32%	27%	34%	30%
Commercial art galleries	37%	38%	40%	48%	47%
Outdoor facilities and parks	47%	52%	49%	50%	39%

- Distinctly different patterns of use are evident across age cohorts.
 - For example, respondents in the 18-34 age cohort reported a higher incidence of use of several of informal settings, including bars and clubs (34%) and school facilities (17%).
 - Respondents in the highest age cohort (65+) were more than twice as likely as those in the youngest cohort to cite 'places of worship' as a setting for arts activities.
- Use of traditional arts facilities, such as theaters, concert halls and art museums, is somewhat lower among the younger age cohorts compared to the older age cohorts.
 - When these younger cohorts age, will they increase their use of traditional arts venues, or continue using more non-traditional settings?



Use of Different Venues and Settings, by Income Cohort

% CITING DIFFERENT VENUES AS PLACES WHERE THEY "REGULARLY DO CREATIVE AND CULTURAL ACTIVITIES," BY HOUSEHOLD INCOME (WEIGHTED)	ETHNICITY	
	White (n=2115)	Non-White (n=287)
Your home	57%	63%
Places of worship	16%	23%
Community centers	19%	20%
University and community college facilities	25%	29%
Public and private school facilities	16%	19%
Bars and clubs	12%	17%
Libraries and book stores	32%	34%
Theaters and concert halls	74%	70%
Art museums	61%	63%
Natural history and historic museums	30%	30%
Commercial art galleries	38%	36%
Outdoor facilities and parks	46%	53%

- Finally, results for the question about settings for arts activities were analyzed by racial/ethnic group.
 - Regrettably, due to the small number of non-white respondents, we can only look at results for white vs. non-white respondents.
- Several differences are notable:
 - Nonwhites are more likely to use their homes as a setting for arts activities, which is consistent with other research.
 - Nonwhites are also more likely to use places of worship and outdoor facilities and parks.
 - As noted earlier, education level and income may be co-factors underlying these patterns.
- Overall, we observe that patterns of use of different venues and settings for art activities vary substantially by age, income and family life stage. Other research has shown significant differences by ethnic group.
 - Although the sample is highly skewed towards culturally active adults, one begins to understand the complexity of the delivery system for culture, at least from the consumer's perspective, and the challenges associated with centralized arts facilities.

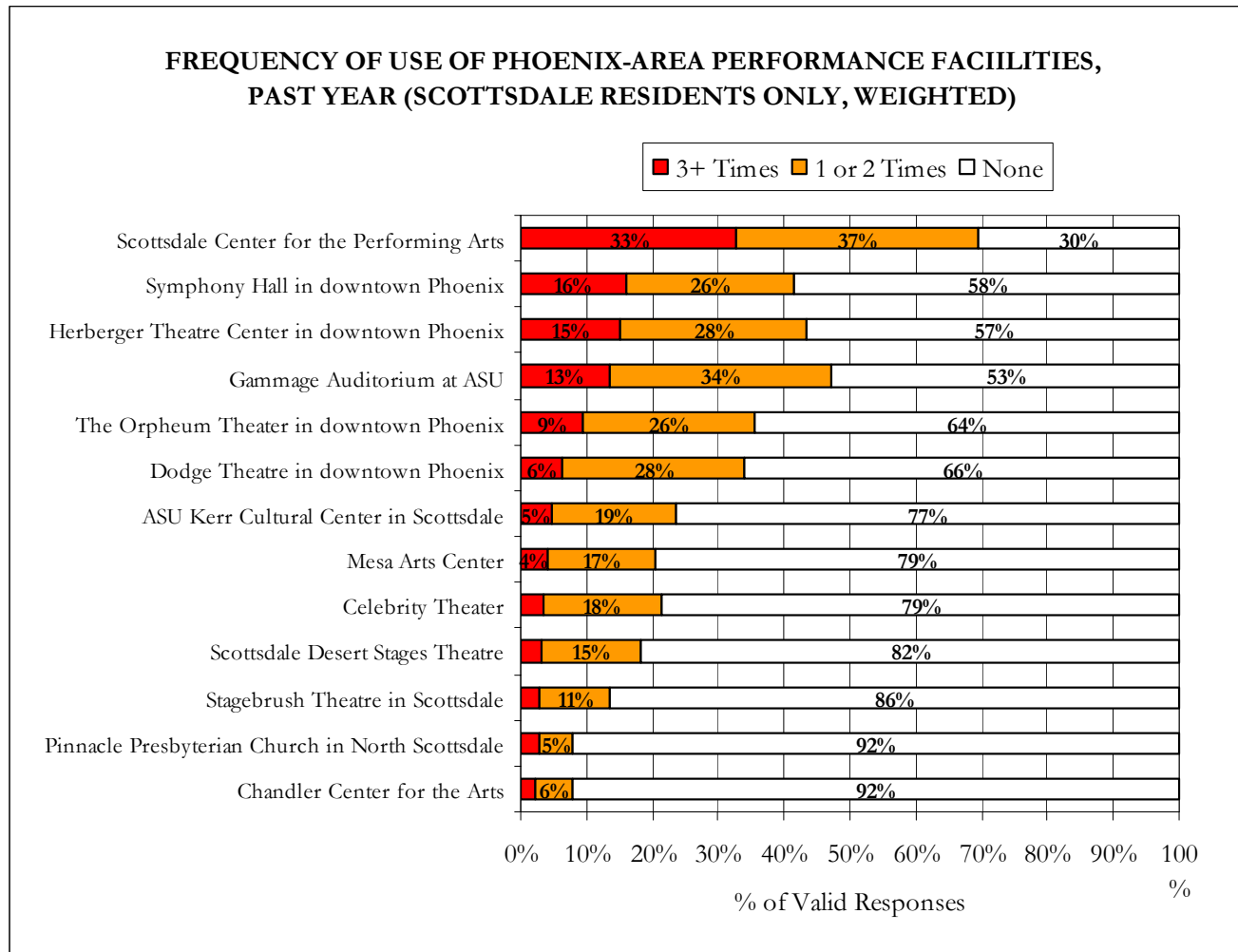




SCPA and SMOCA Participation Profile



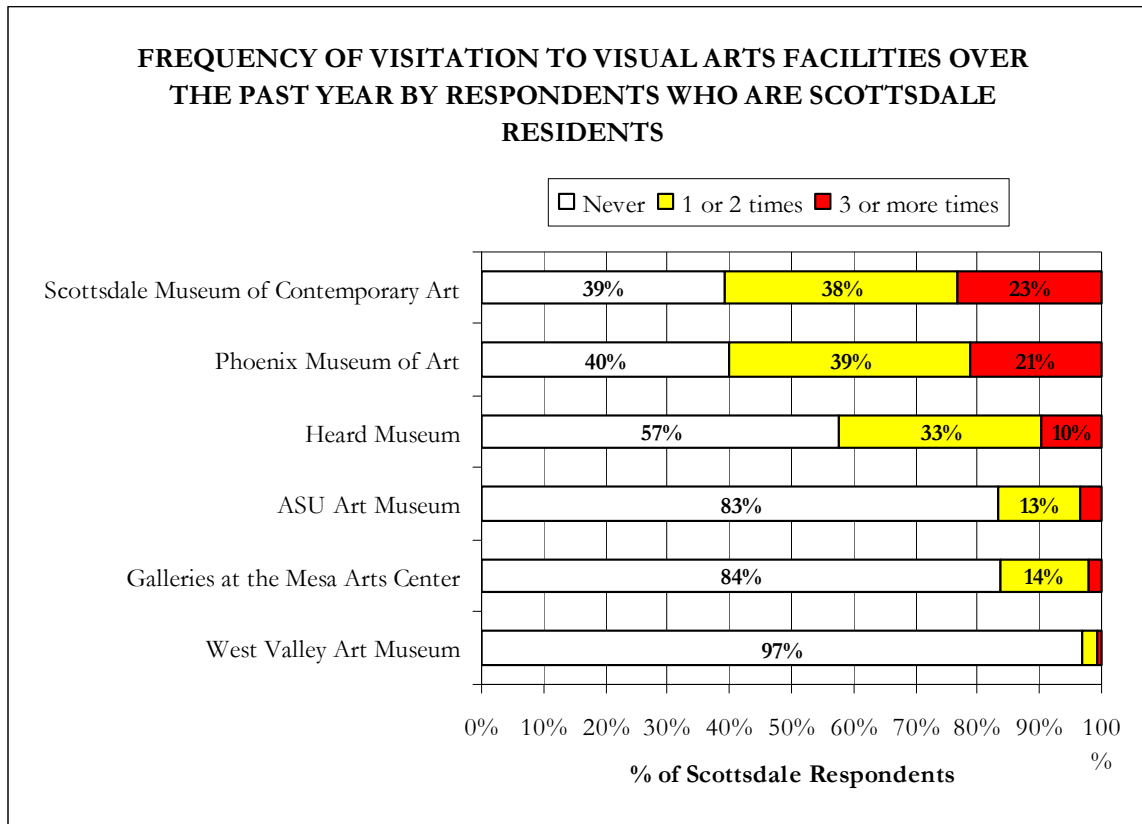
Frequency of Attendance at Area Performing Arts Venues



- Respondents were asked to indicate how often they had attended Phoenix-area performing arts facilities in the last 12 months. Responses are reported here for Scottsdale residents only. Results help to frame the competitive landscape within the performing arts sector.
- Since an email invitation to take the survey was broadcast to SCPA's internal email list, we would expect to see high frequency levels for SCPA. In fact, 70% of all respondents reported at least one SCPA attendance in the past year.
- For Scottsdale respondents, SCPA attendance was cited at much higher rates than attendance at other venues. Since this was not a random sample, however, we must be careful not to use these results to generalize about non-respondents.
- Aside from SCPA, overall frequency of use is highest for the downtown Phoenix venues, as well as Gammage Auditorium.
 - If one were to look at the subset of respondents who attended SCPA at least once in the past year, a large majority reported attendance at several other venues. This underscores the competitive nature of the market



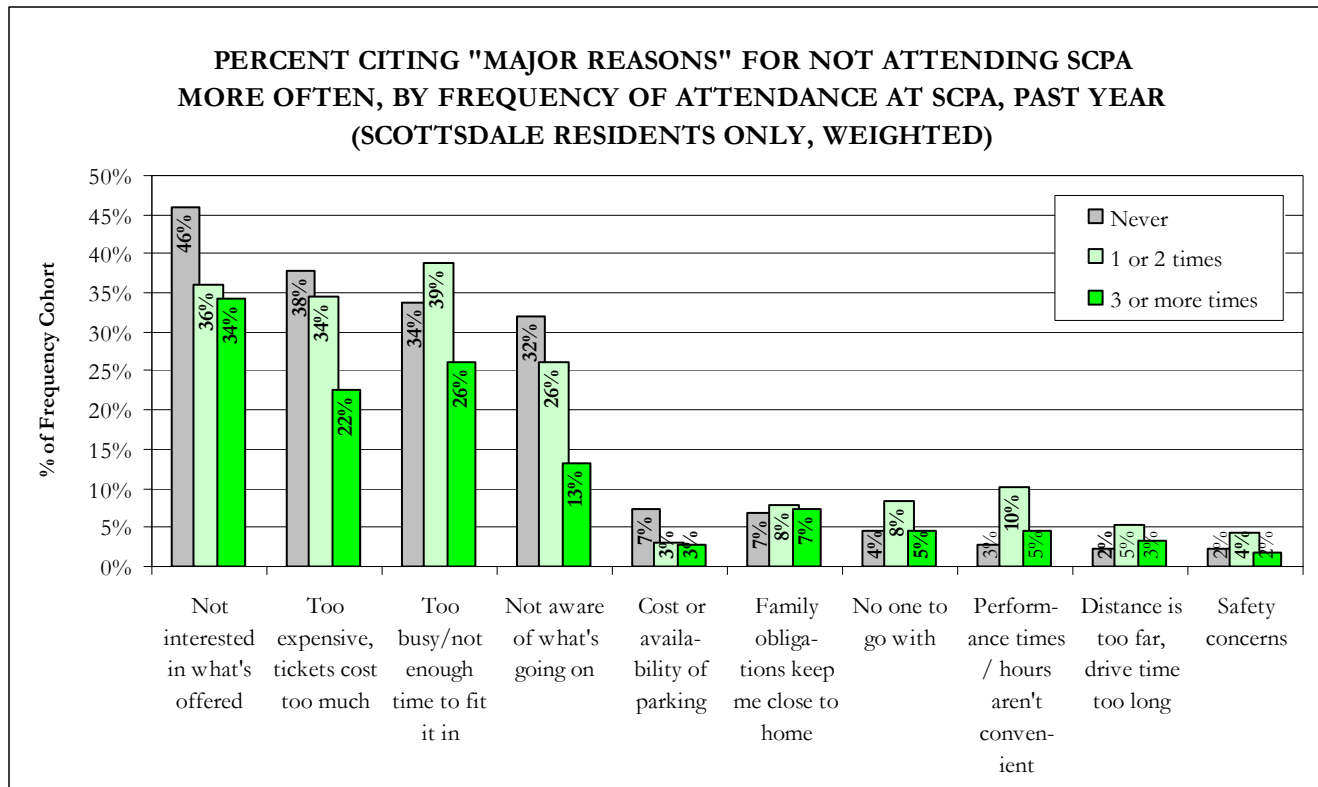
Frequency of Attendance at Area Visual Arts Organizations



- On average, frequency attendance at art museums and galleries among Scottsdale respondents is somewhat lower than attendance at performing arts organizations. This is probably a function of the performing arts skew in the data, due to the large number of responses generated through the SCPA email list.
- Among respondents, SMOCA is one of two primary providers of visual arts programming, along with the Phoenix Museum of Art. Nearly equal proportions of respondents reported visitation to both facilities, and at similar frequency levels.
 - If one were to look at the subset of respondents who attended SMOCA at least once in the past year, 75% of them also attended the Phoenix Museum of Art, and 52% also attended the Heard Museum.



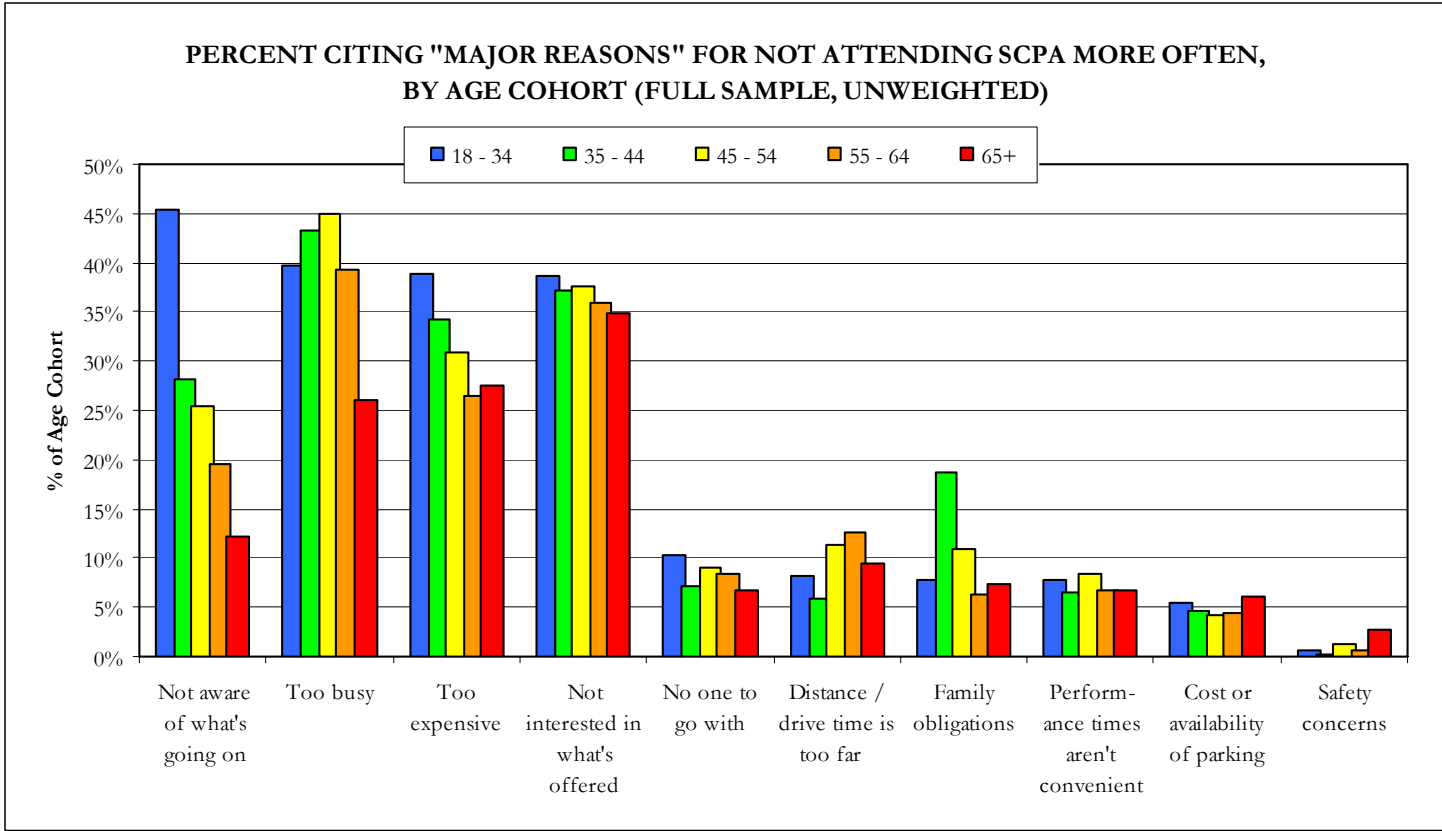
Barriers to Attendance: SCPA



- Respondents were asked “Which of the following are major reasons why you don’t attend performances at the Scottsdale Center for the Performing Arts more often?” In the chart at left, results are cross-tabulated by frequency of SCPA attendance.
- As would be expected, respondents who did not report any SCPA attendance in the past year cited more barriers overall.
- Both for SCPA’s lowest and highest frequency attendees, “not interested in what’s offered” was cited as the biggest barrier to more frequent attendance.
- “Too busy” ranks a distant second as a barrier among SCPA’s most frequent attendees, although it is the leading barrier for occasional attendees.
- “Too expensive,” which is typically among the top two reasons on these types of surveys, is rated significantly lower for those who attend SCPA most frequently, but remains a primary barrier to SCPA for those who did not attend at all in the past year.
- As might be expected, a large disparity was observed across the frequency cohorts for “Not aware of what’s going on,” indicating that about a third of respondents who did not attend SCPA in the past year might attend more often if awareness levels could be raised.



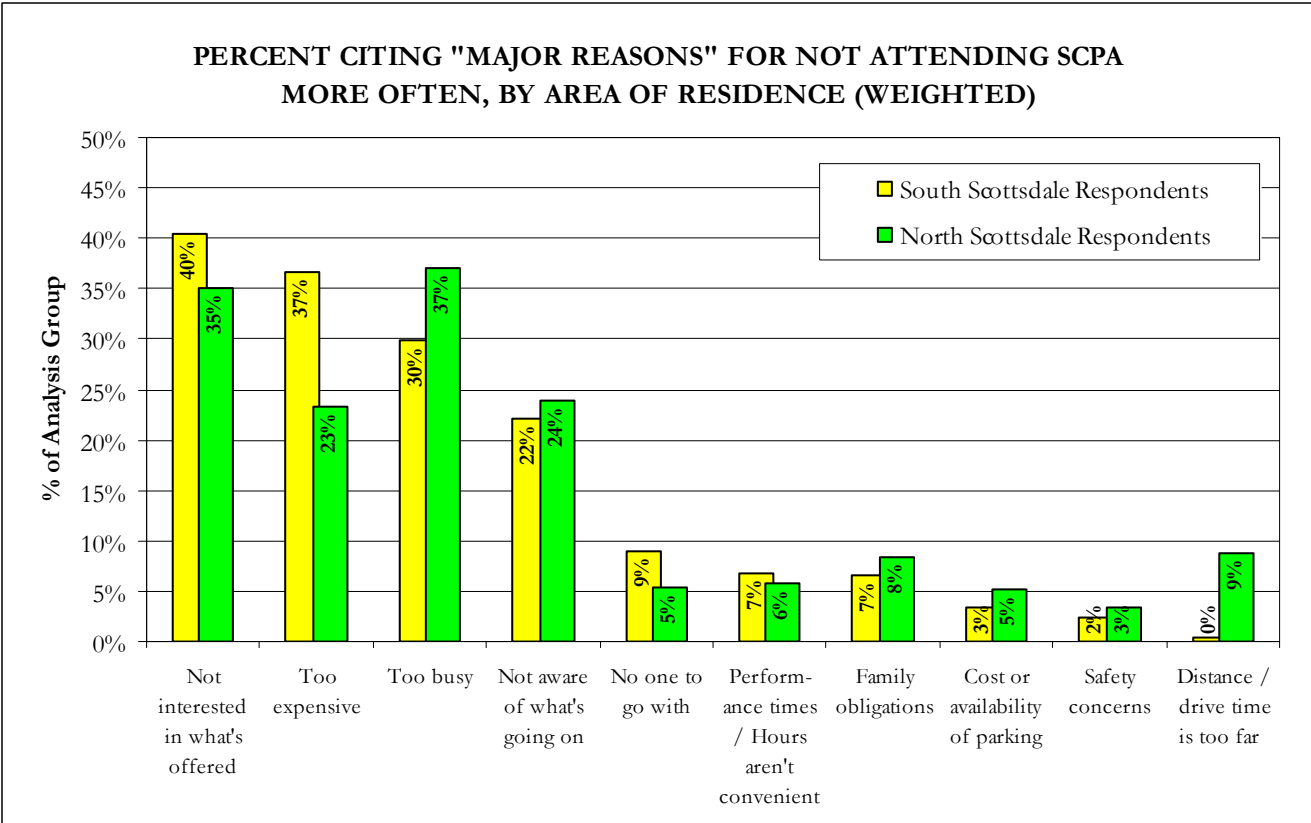
Barriers to Attendance: SCPA (continued)



- When analyzed by age cohort and sorted by the priorities of the 18-34 cohort, the picture changes dramatically.
- Among 18-34 year olds, the primary reason for not attending SCPA more often is, by a wide margin, lack of awareness. This indicates that a significant shift in marketing strategies would be needed to reach this group.
- “Too busy” is significantly less of a barrier for the 65+ cohort.
- As would be expected, cost is a greater barrier for younger respondents with more modest incomes.



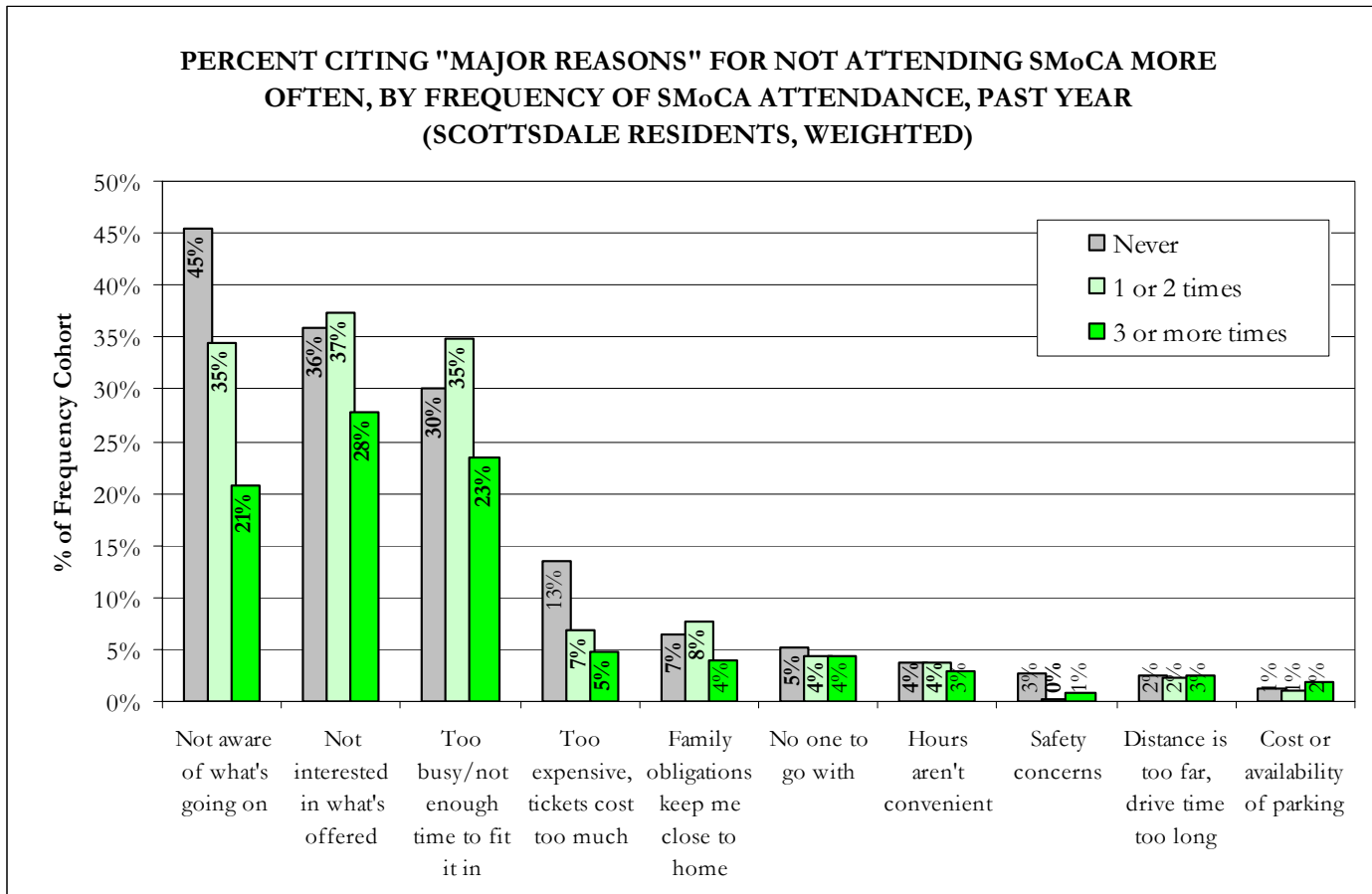
Barriers to Attendance: SCPA (continued)



- When barriers are compared for residents of North and South Scottsdale, important differences are observed.
- South Scottsdale residents are significantly more likely to cite cost as a “major reasons” for not attending SCPA more often.
- North Scottsdale residents cite “too busy” as the greatest barrier, with lack of interest a close second, and all other reasons significantly less important.
- While distance/drive time was cited as a problem by some North Scottsdale resident in the key informant interviews earlier in the study, only 9% of North Scottsdale residents cited this as a “major reason” for not attending SCPA more often, suggesting that it is not primary or even secondary barrier. Similar results for this data point were observed in reference to SMOCA.



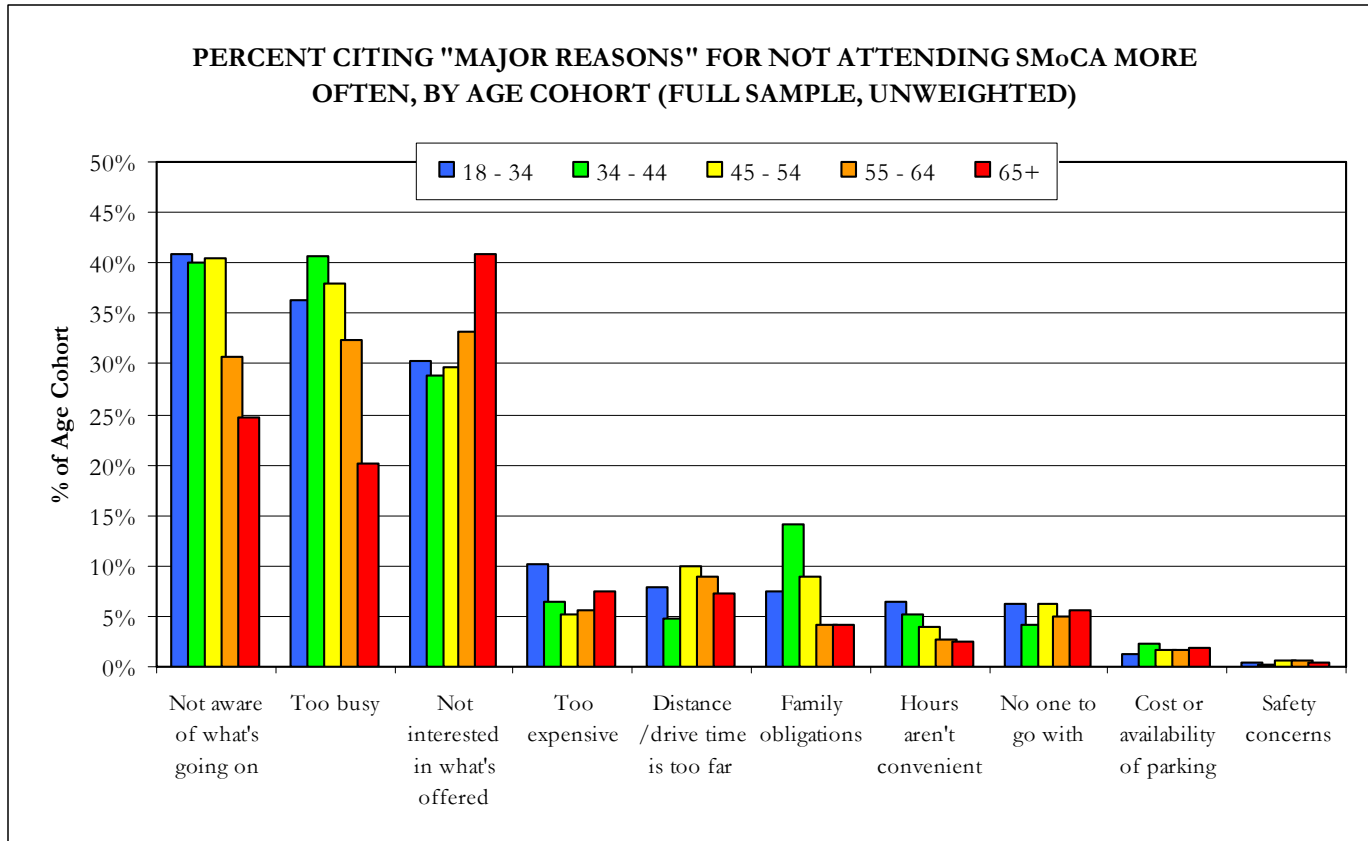
Barriers to Attendance: SMOCA



- Among SMOCA’s highest frequency visitors, the primary reason for not attending SMOCA more often is “not interested in what’s offered.”
- Lack of awareness is by far the biggest barrier for respondents who reported no SMOCA visitation over the past year, indicating that at least part of this group might be attainable through different communications strategies and targeted programming.
- “Too busy” is a prominent barrier for those who visit SMOCA just occasionally.
- Unlike SCPA, cost was not cited as a barrier to SMOCA for most respondents, nor was “hours aren’t convenient.”



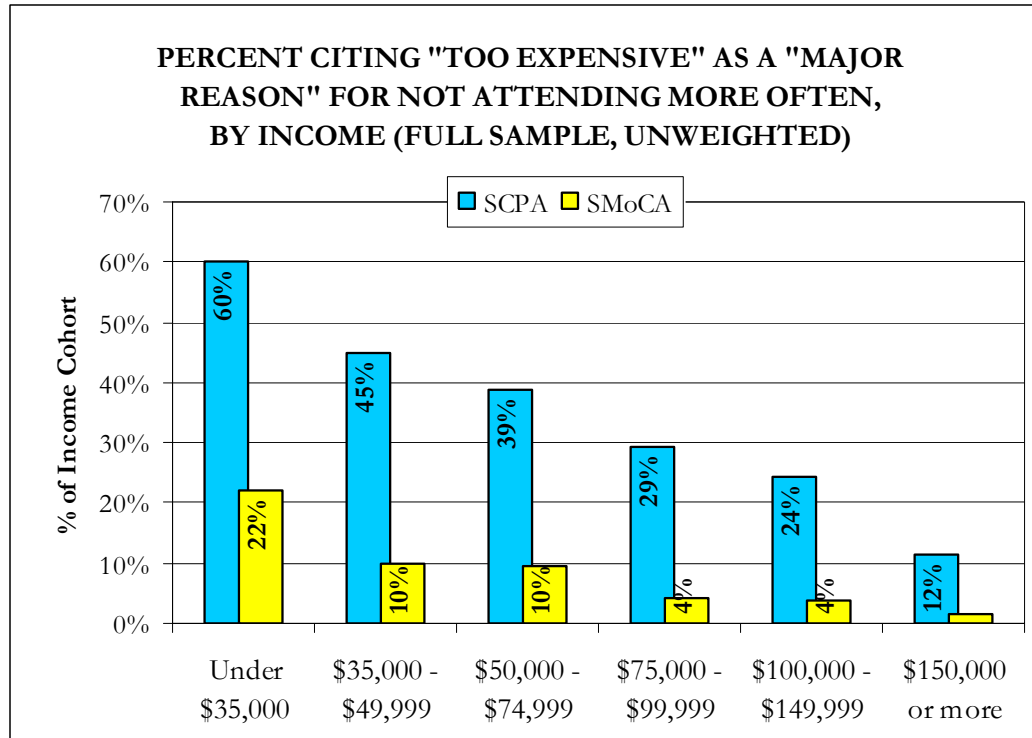
Barriers to Attendance: SMOCA (continued)



- With respect to age, “not aware of what’s going on” and “too busy” are major reasons for not attending SMOCA more often among younger respondents, but less so for older respondents.
- The opposite pattern was observed for “not interested in what’s offered.” In this case, older respondents reported that they are significantly less interested in SMOCA programs, suggesting its appeal to a younger demographic.

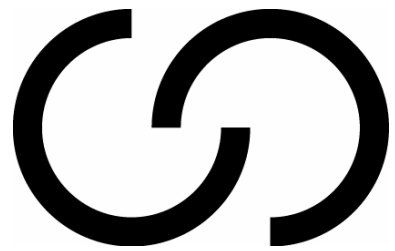


The Cost Barrier vs. Household Income



- How does household income correlate with the incidence of respondents citing “too expensive” as a major reason for not attending more often? Very clearly. The percentage of respondents reporting that cost is a “major reason” for not attending more often decreases consistently as household income increases, as illustrated in the chart at left.
- “Too expensive” was cited as a “major reason” for not attending SCPA more often by five times as many respondents in the “Under \$35,000” income cohort, compared to the “\$150,000 or more” cohort (60% vs. 12%, respectively). Whether perceived or real, cost is a significant barrier to increased SCPA attendance among respondents in the lower income cohorts.
- Respondents generally do not view SMOCA as “too expensive,” although this perception exists among 22% of respondents in the “Under \$35,000” income cohort.





Centrality of Arts Activities



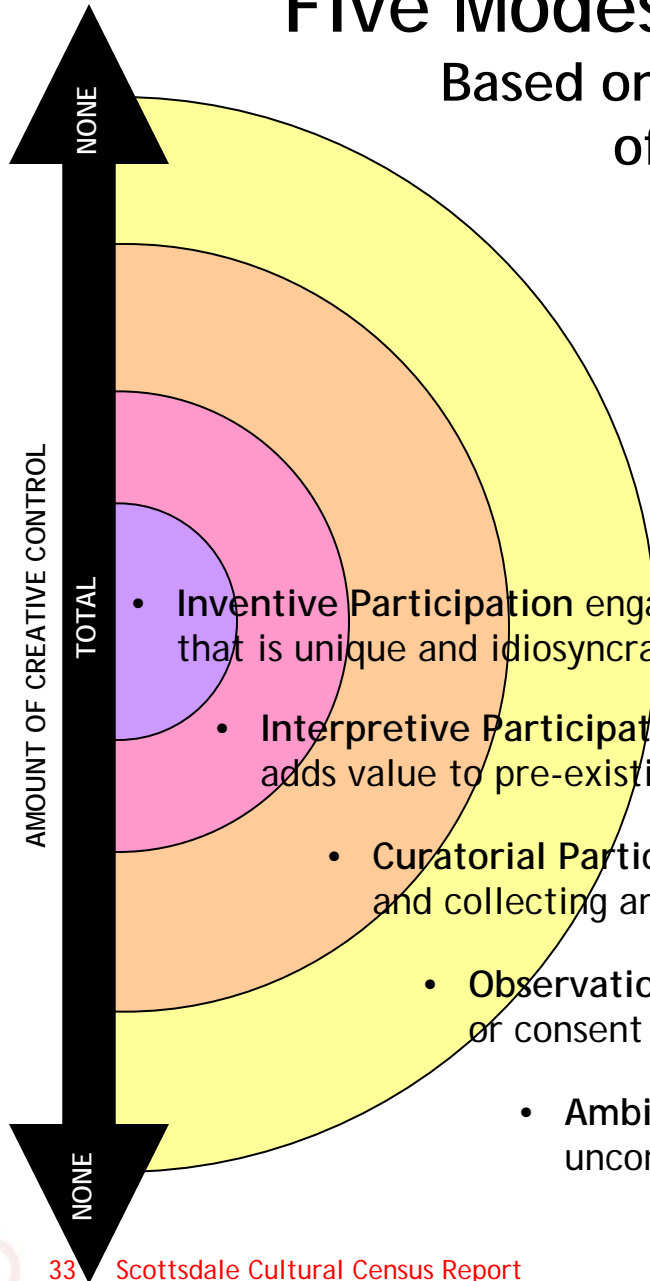
Centrality of Arts Activities

- A large portion of the survey was devoted to profiling respondents according to an extensive list of arts activities within each of the major artistic disciplines (literary arts, music, dance, theatre, visual arts and crafts, and other common activities).
- The following slides present overall results within each discipline, as well as break-downs for each activity by frequency cohort, so that we can compare the activity profiles of respondents who are very active culturally with those who are not.
- For each activity, respondents were asked to select one of five response items:
 - Not interested
 - Haven't, but would like to try
 - Used to, but don't any more
 - Enjoy it occasionally
 - A vital activity for me
- It is important to note that these response items do not represent a continuous numerical scale. Rather, they are categorical in nature. The goal of these response items is to capture the centrality of each activity to the respondent, including indicators of latent and former interest, as well as activities that are of current interest.
- Results paint a detailed picture of the kinds of arts activities that are vital to Scottsdale-area adults, as well as those activities that might lead to increased levels of participation.
- As you read through the results, consider whether each activity is inventive, interpretive, curatorial or observational (based on the 'five modes of participation' framework, next page).



Five Modes of Arts Participation

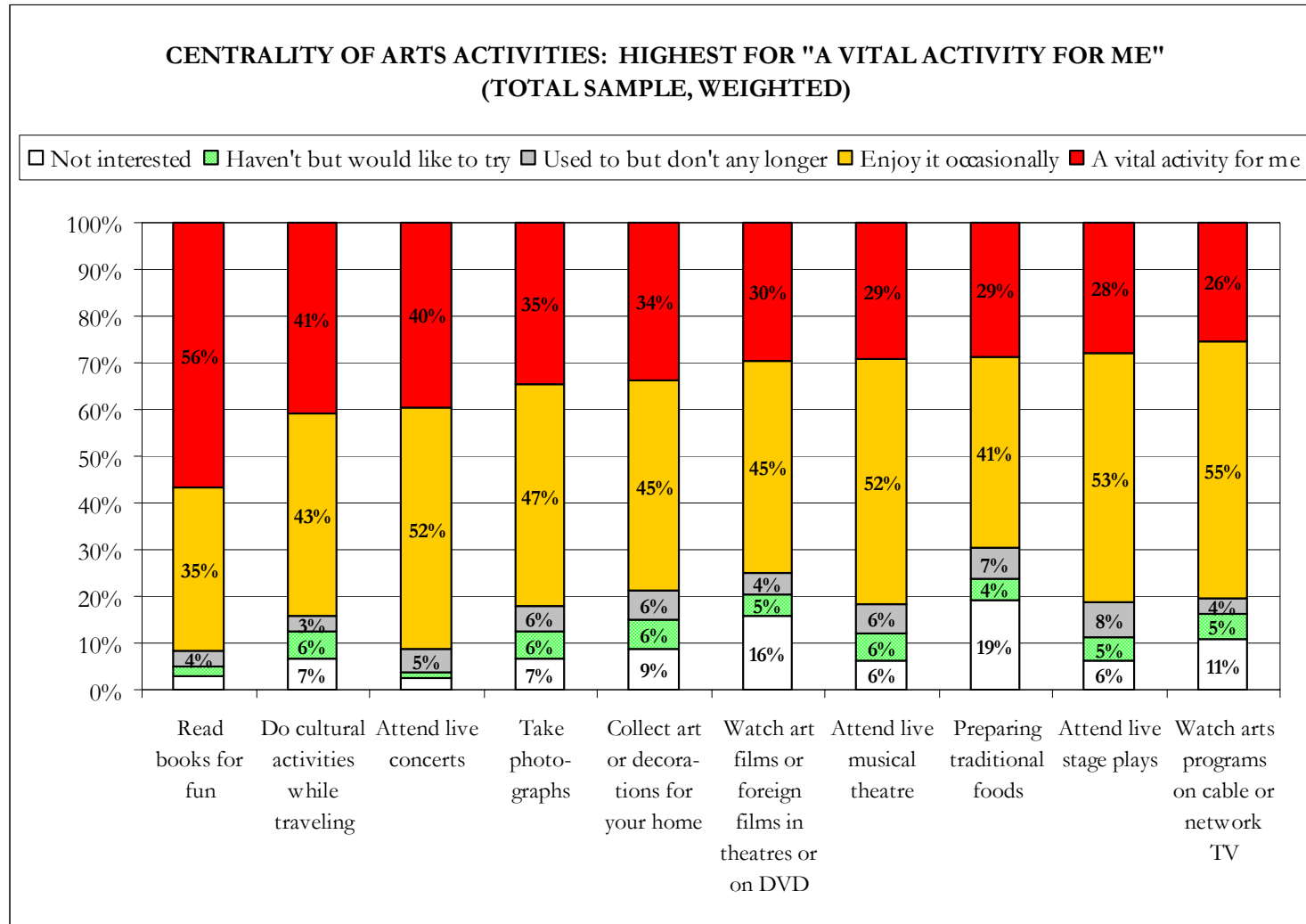
Based on the Participant's Level of Creative Control



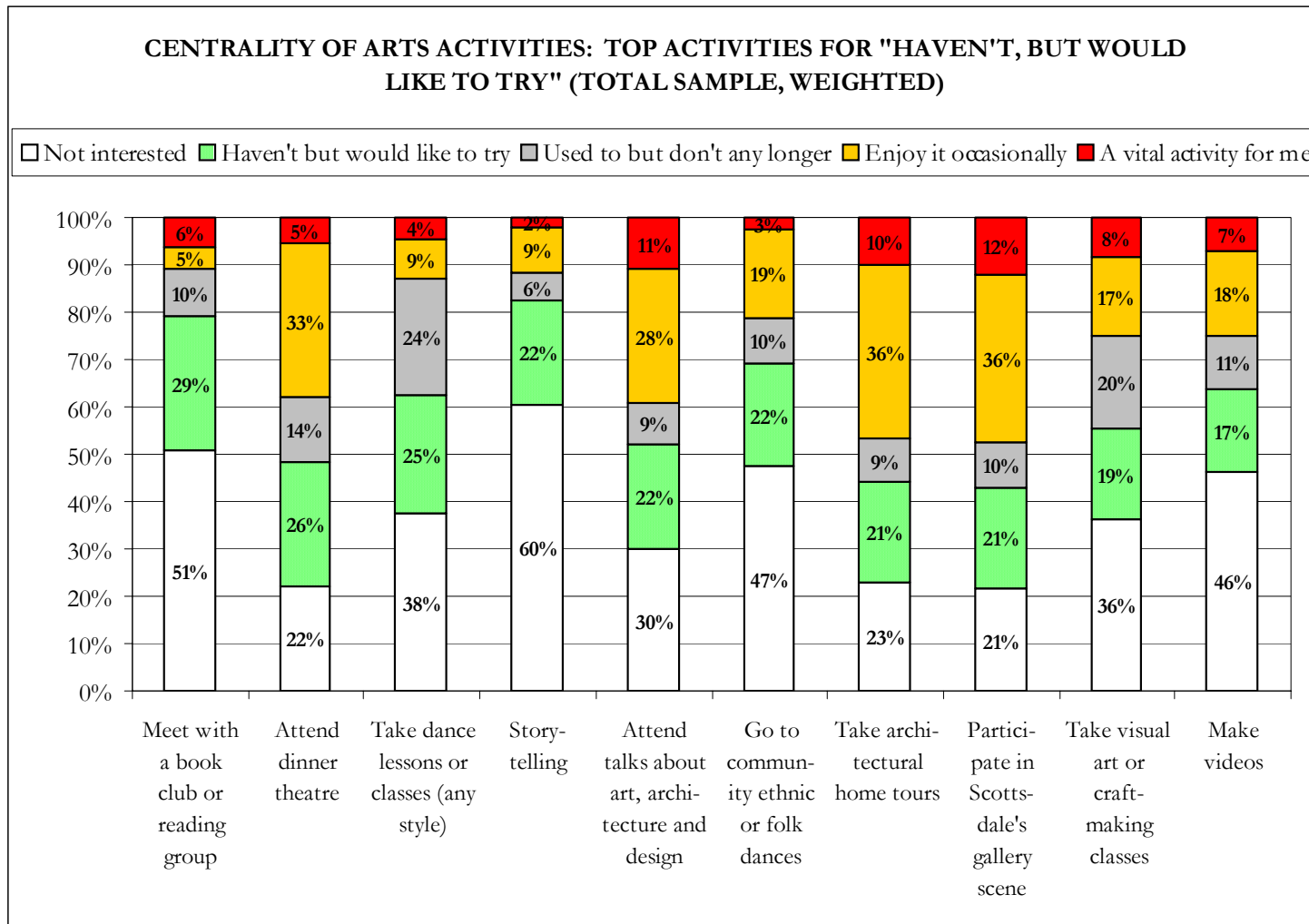
- **Inventive Participation** engages the mind, body and spirit in an act of artistic creation that is unique and idiosyncratic, regardless of skill level.
- **Interpretive Participation** is a creative act of self-expression that brings alive and adds value to pre-existing works of art, either individually or collaboratively.
- **Curatorial Participation** is the creative act of purposefully selecting, organizing and collecting art to the satisfaction of one's own artistic sensibility.
- **Observational Participation** encompasses arts experiences that you select or consent to have.
- **Ambient Participation** involves experiencing art, consciously or unconsciously, that you did not select.



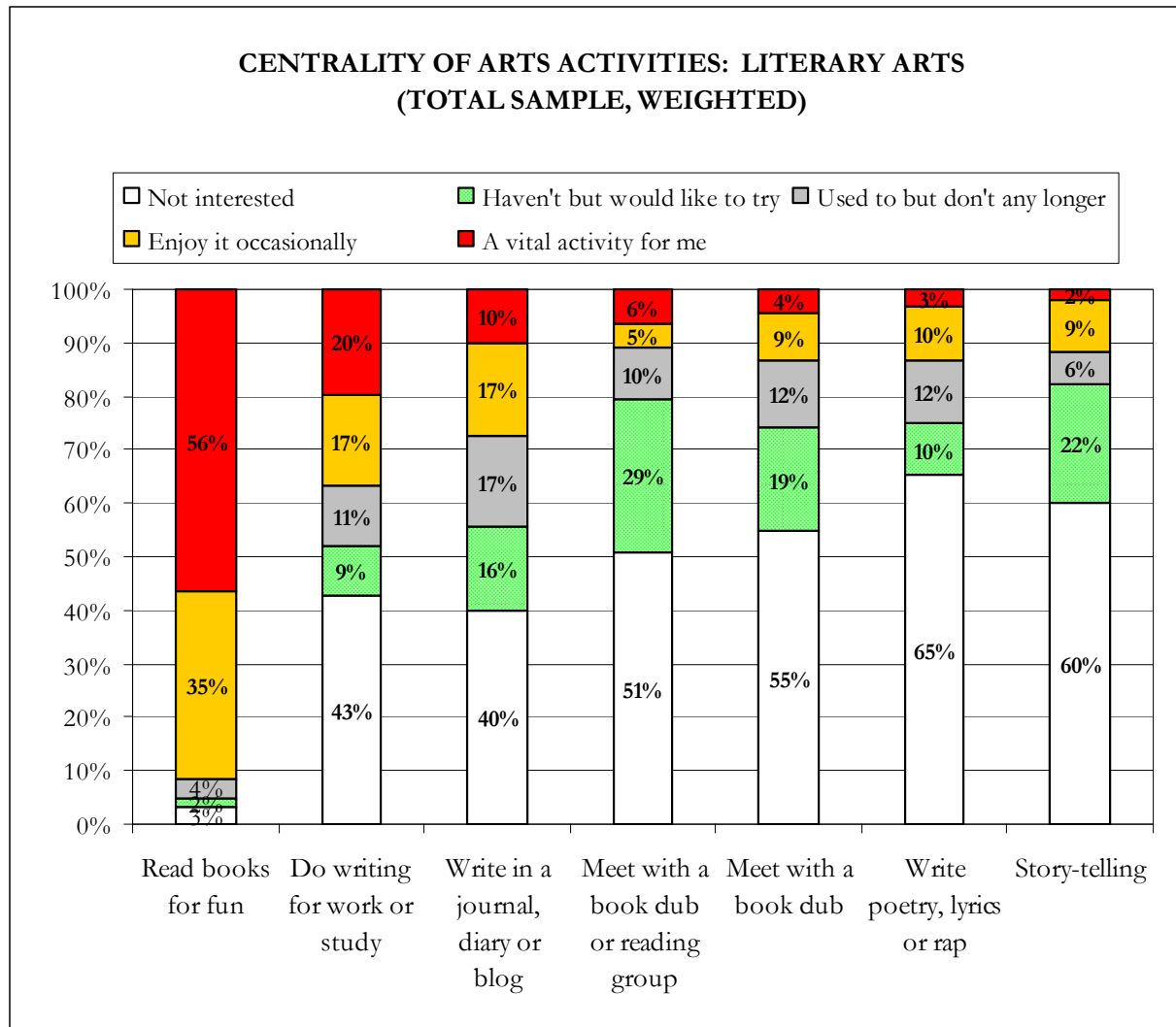
Ten Most Central Arts Activities



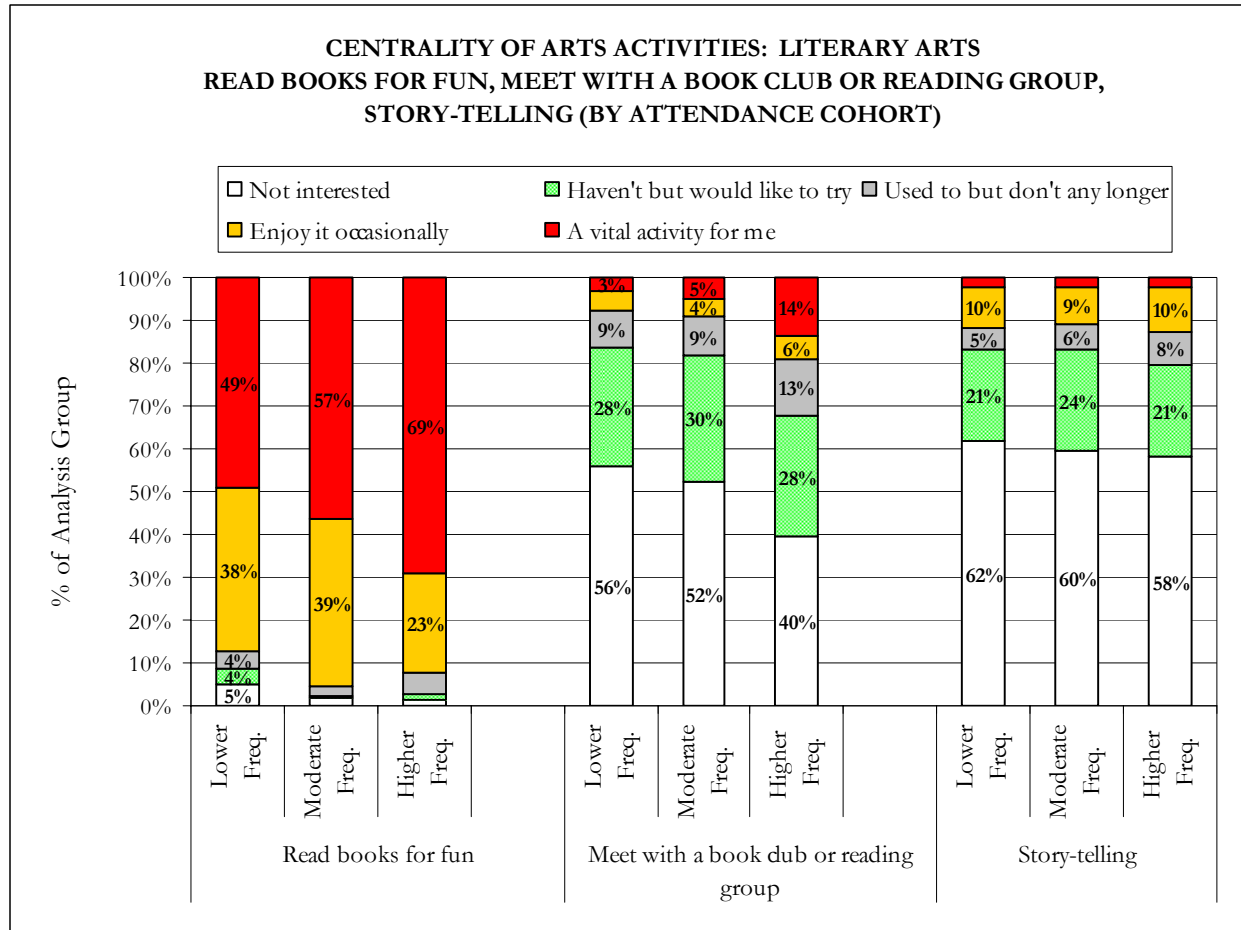
Ten Activities with Highest Latent Interest (i.e., "haven't, but would like to try")



Centrality of Arts Activities: Literary



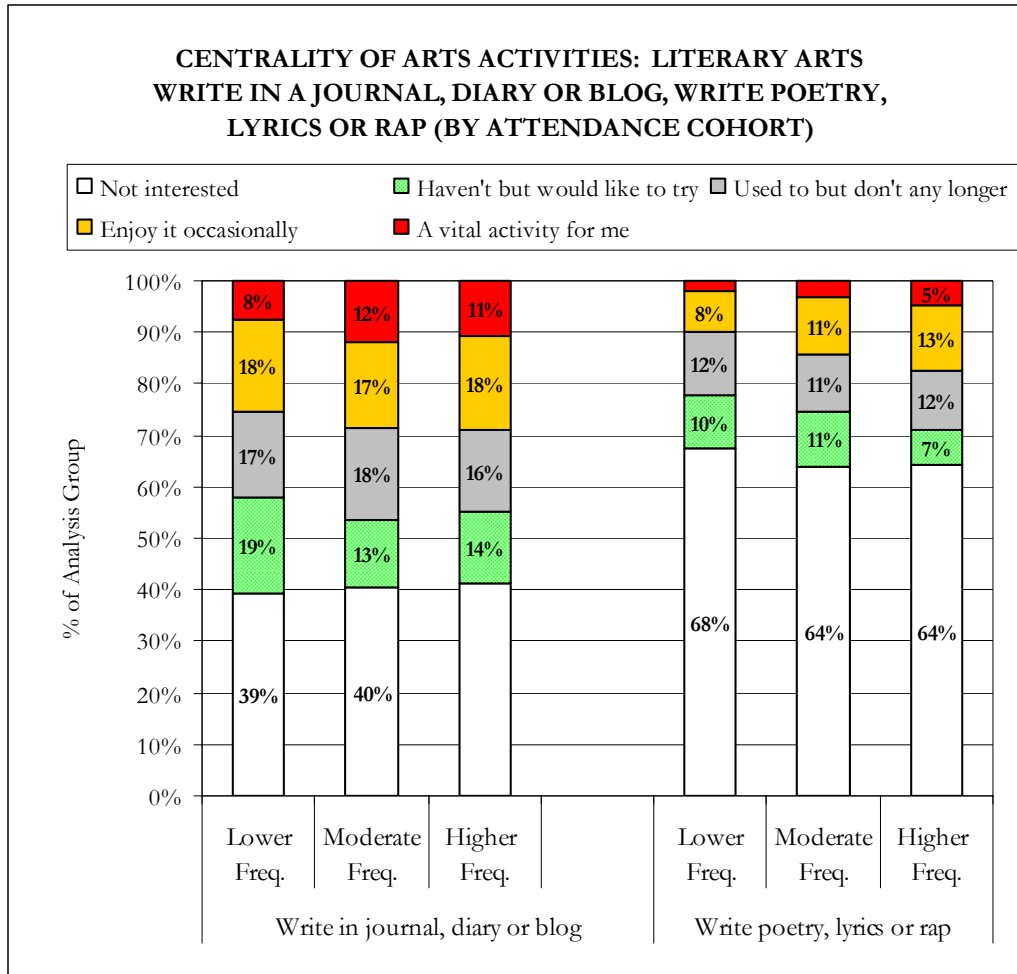
Centrality of Arts Activities: Literary



- “Reading books for fun” is a vital activity for at least half of all frequency groups, suggesting that book events/programs could have a wide impact.
- Significant latent interest was reported for meeting with a book club or reading group, indicating a desire among almost a third of respondents to add a social dimension to reading.
- Story-telling, while vital to only a tiny percentage of respondents, also garnered a high level of latent interest (about 20%), perhaps indicating a desire among respondents to interpret and share experiences.



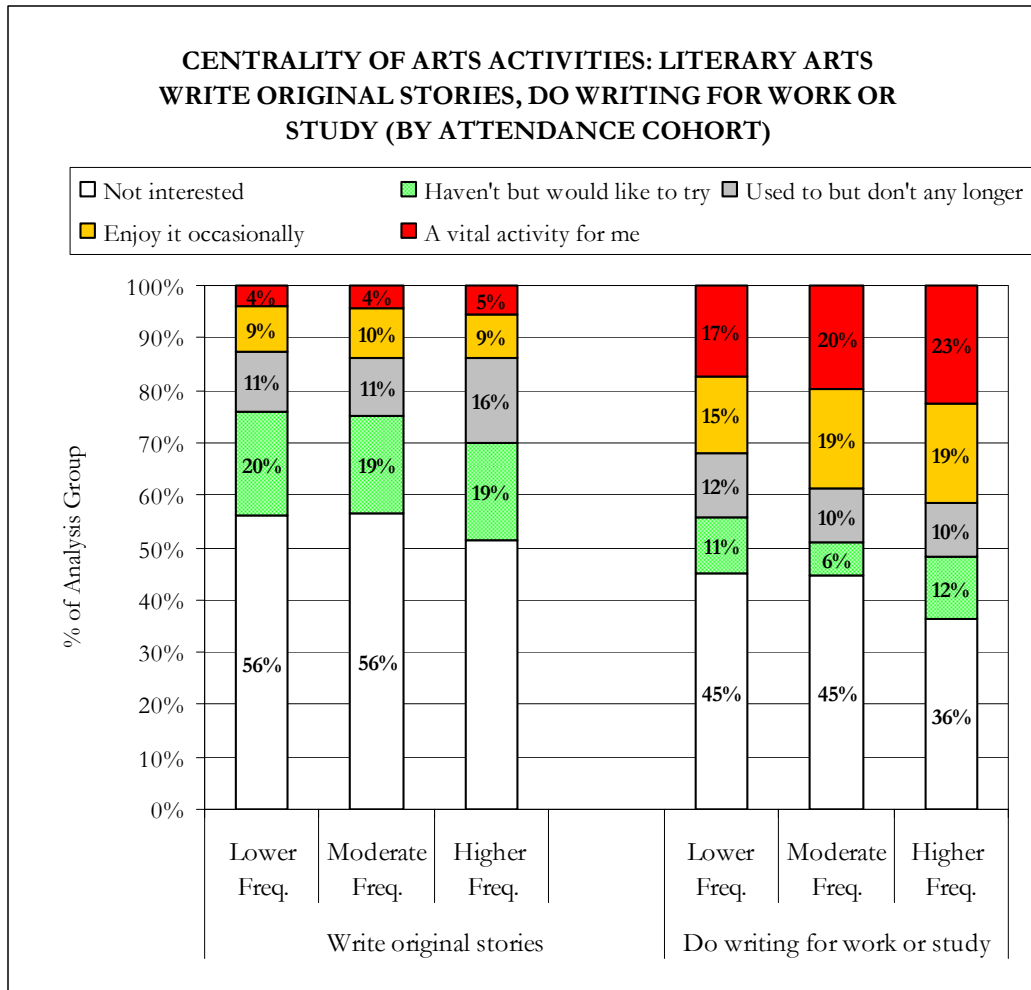
Centrality of Arts Activities: Literary



- On average, 27% of all respondents reported that “writing in a journal, diary or blog” is at least an occasional activity, with another 15% indicating latent interest.
- It is interesting to see how the centrality of most reading and writing activities does not vary much across the frequency cohorts.
- Also, it is interesting to note that interest in writing personal thoughts and experiences (in a journal, diary or blog) exceeds interest in writing structured prose (poetry, lyrics or rap, short stories – next page).



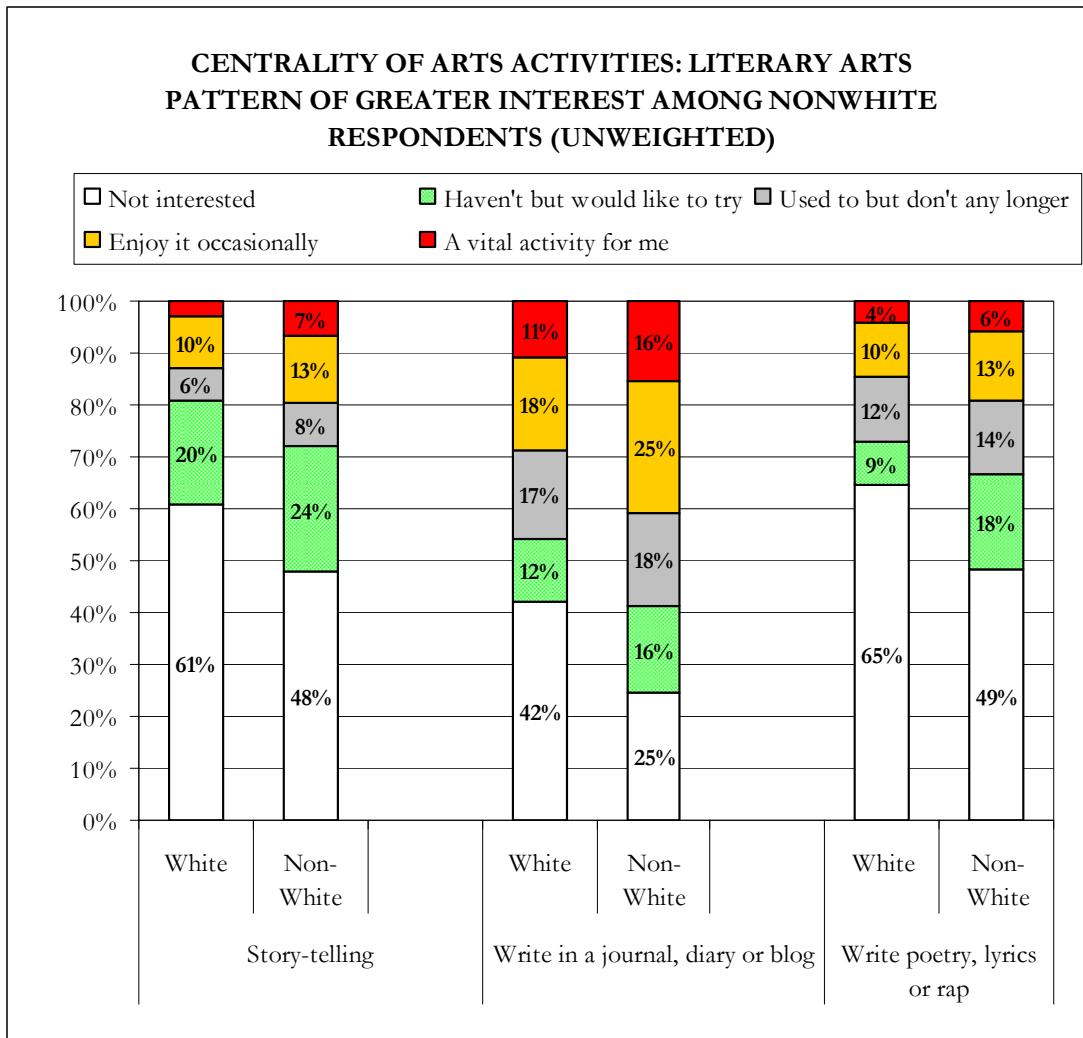
Centrality of Arts Activities: Literary



- Aside from reading books, “writing for work or study” is the second most central literary activity overall, with 20% of all respondents indicating that it is a “vital activity.”
 - One might infer from the results a need or desire for creative writing programs that would help people express their innermost thoughts, or help them write better for business purposes. The case for such programs is only underscored by the need in the business community for more creative workers.



Centrality of Arts Activities: Literary

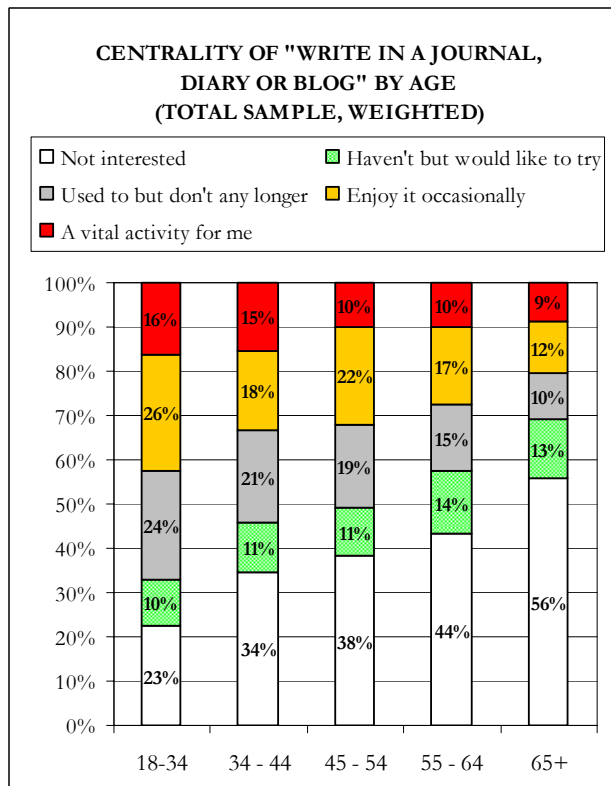
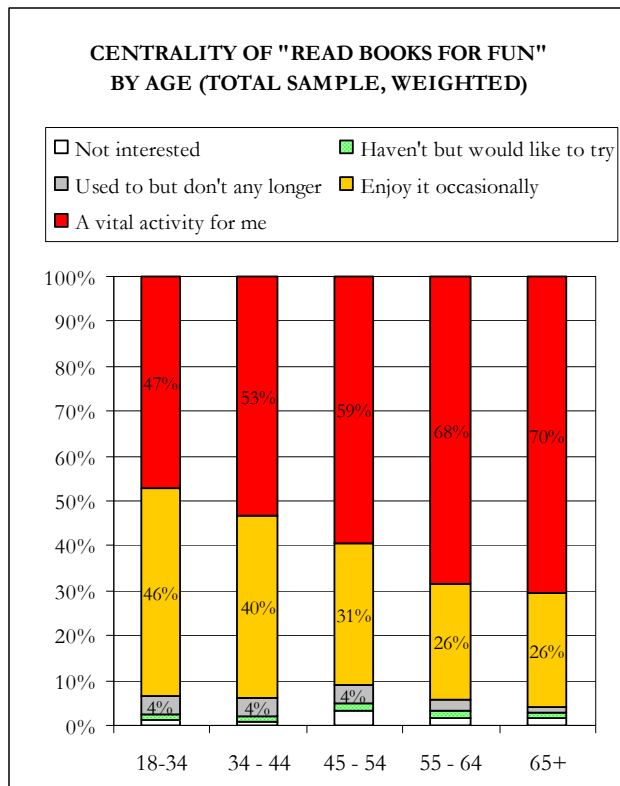


- One can observe a clear pattern among nonwhite respondents, who reported generally higher levels of centrality, both in terms of current participation and latent interest, among the literary activities tested. Three examples are included in the chart at left.

- Nonwhite respondents, perhaps, have fewer opportunities to gain social recognition by sharing their experiences through narrative and spoken word.



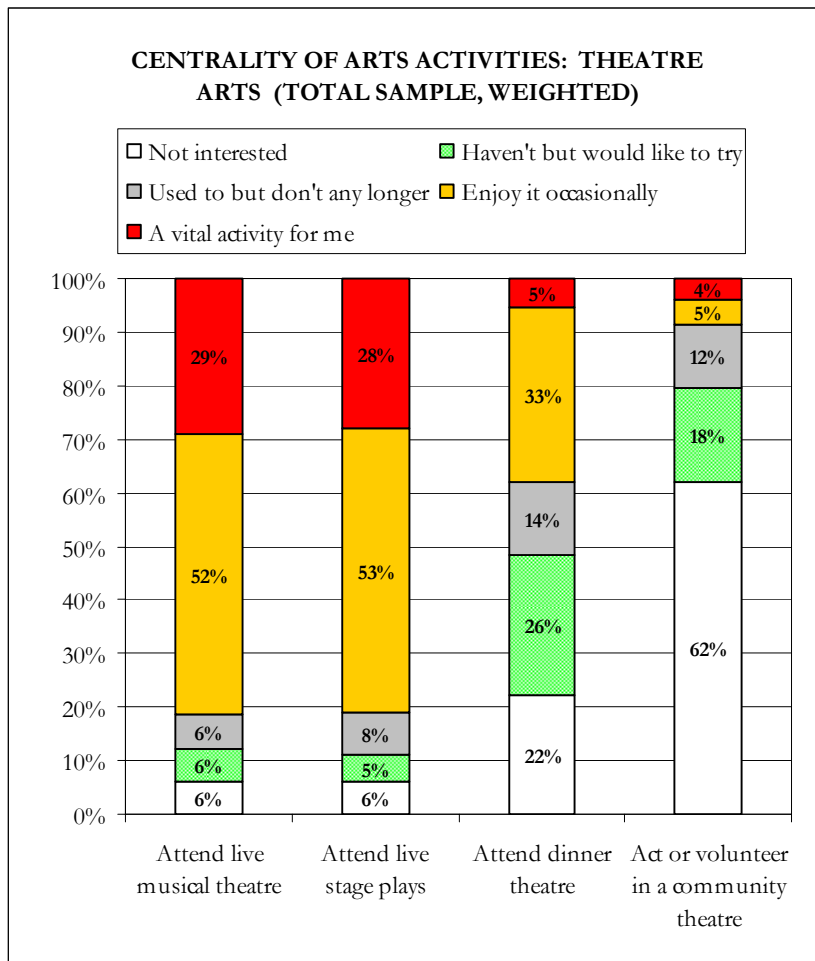
Centrality of Arts Activities: Literary



- Patterns emerge when centrality of literary activities is analyzed by age cohort.
- Generally, “passive” literary experiences, in which the participant absorbs another’s creative work, are less appealing to younger cohorts, while avenues of personal expression are more valued among younger respondents.
 - In the examples to the left, “Reading books for fun” is significantly less vital for respondents ages 18-34 than respondents over 55, while “Writing in a journal, diary or blog” is much more central to respondents in the youngest age cohort.



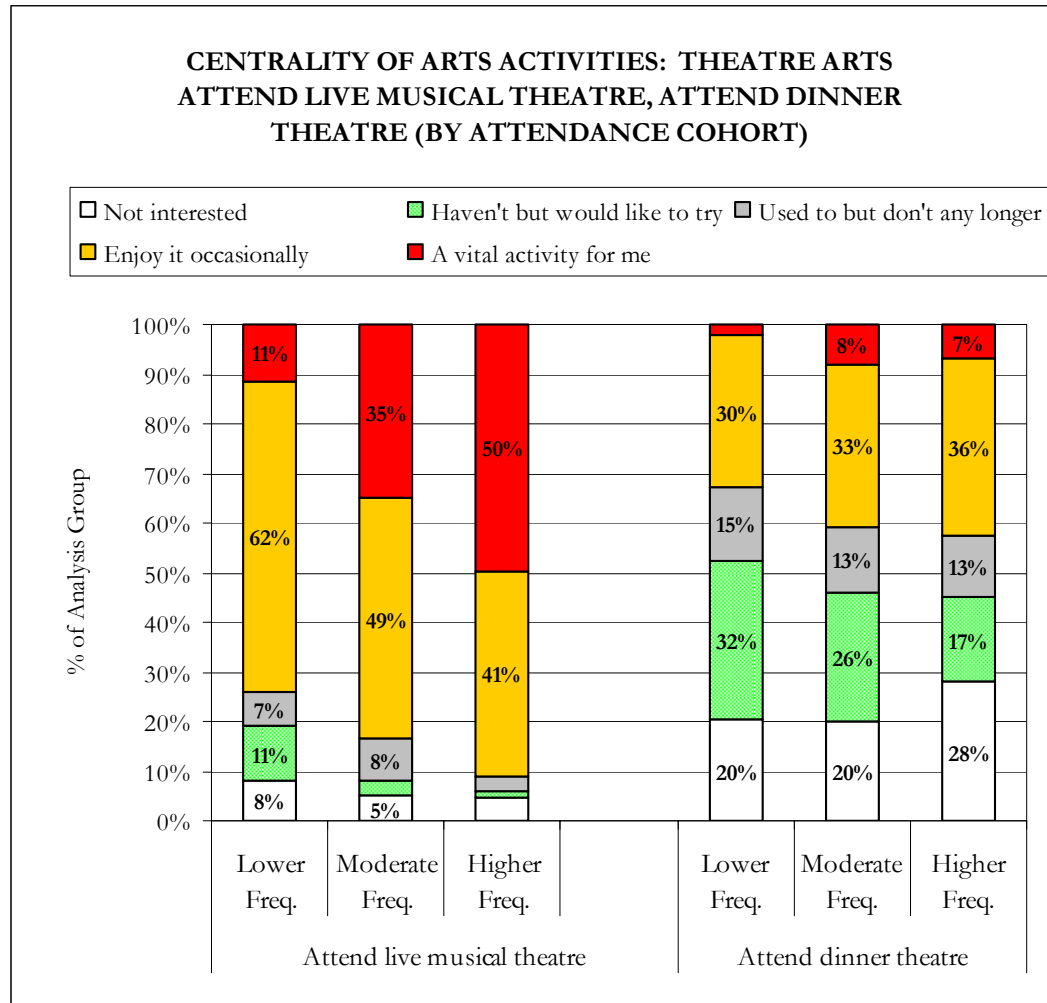
Centrality of Arts Activities: Theatre



- Overall, respondents reported a high level of centrality for observational participation in theatre, including attendance at stage plays and musicals – almost equally. The results clearly illustrate that theater presentations are a regular or occasional part of the cultural diet of over 80% of respondents, on average.
- A high level of latent interest was reported for “attend dinner theater” (26%, on average), suggesting an interest in the social aspect of theater attendance.
- With respect to acting (the interpretive mode of theatre participation), centrality levels were extremely low except for a moderately high level of latent interest (18%), which suggests some demand for community theatre programs. Further analysis indicates that levels of latent interest in “act or volunteer in a community theatre” are consistent across the frequency cohorts.



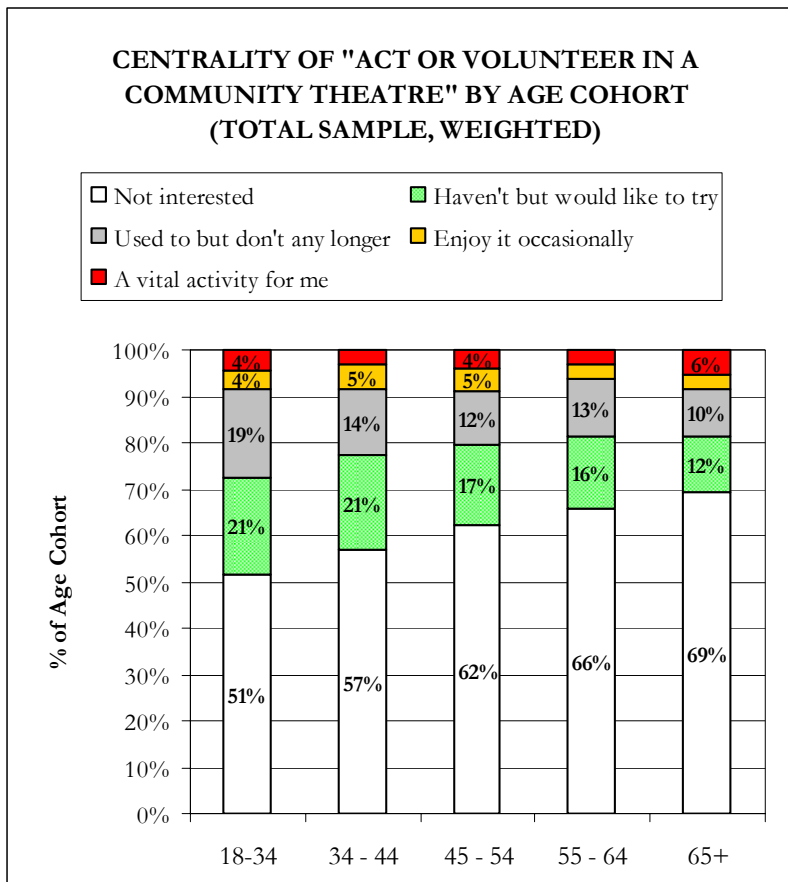
Centrality of Arts Activities: Theatre



- As would be expected, centrality levels for observational participation in musical theatre rise dramatically across the frequency cohorts.
 - This is partly due to the definitions of the frequency cohorts, and partly due to underlying causes such as differences in income and education levels (discussed earlier).
- What is more notable here is that respondents in the lower frequency cohort expressed very high levels of latent interest in “attend dinner theater” (32%).
 - This finding, combined with other results, illustrates how individuals with weaker connections to the arts tend to place more value on the social aspect of attendance. The policy implication here is that programs with a social component structured into them will appeal to a broader cross-section of the public. This implication might be extended to cultural facilities, as well (i.e., that facilities with a social component structured into them will appeal to a broader cross-section of the public).



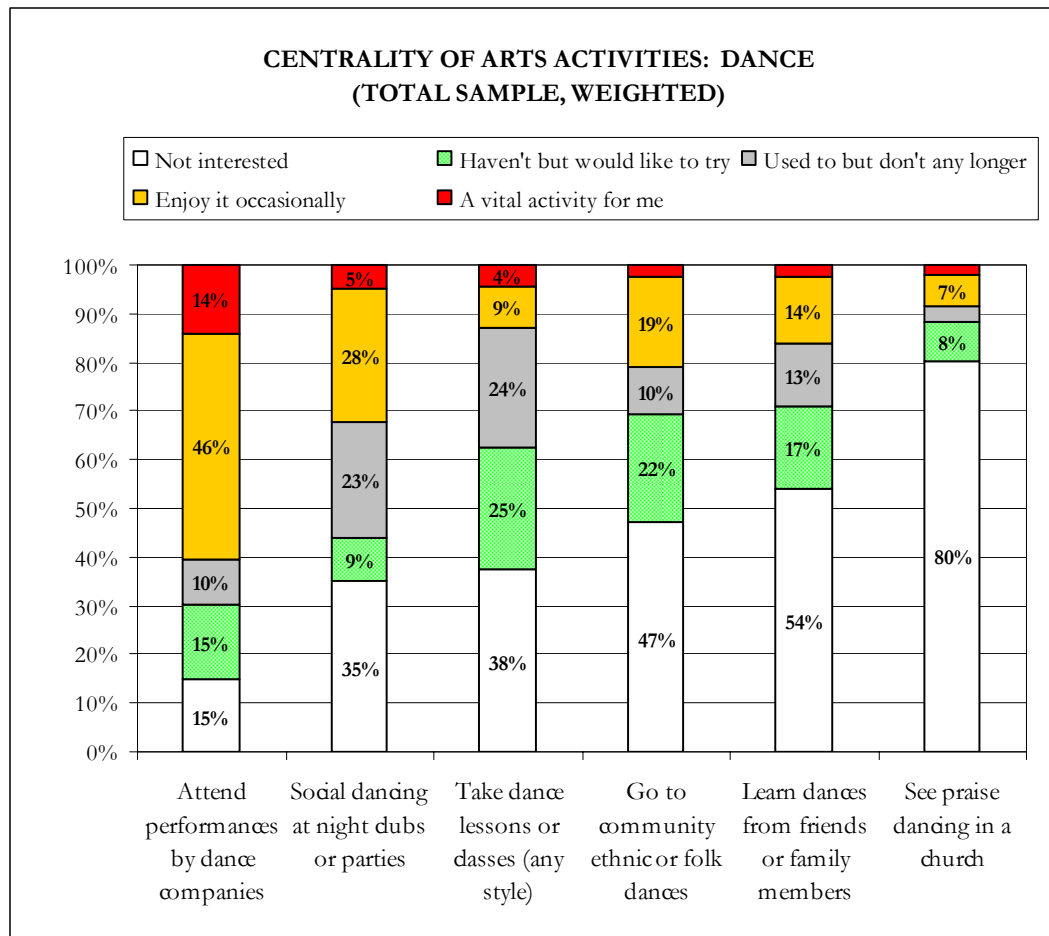
Centrality of Arts Activities: Theatre



- While levels of current participation for “act or volunteer in a community theatre” are consistently low across the age cohorts, latent interest is inversely correlated with age. In other words, younger folks, on average, are more likely to be interested in getting involved with acting lessons or community theatre. They are also more likely to have acted in the past.
- Differences in centrality of theatre activities between white and nonwhite respondents were not significant.



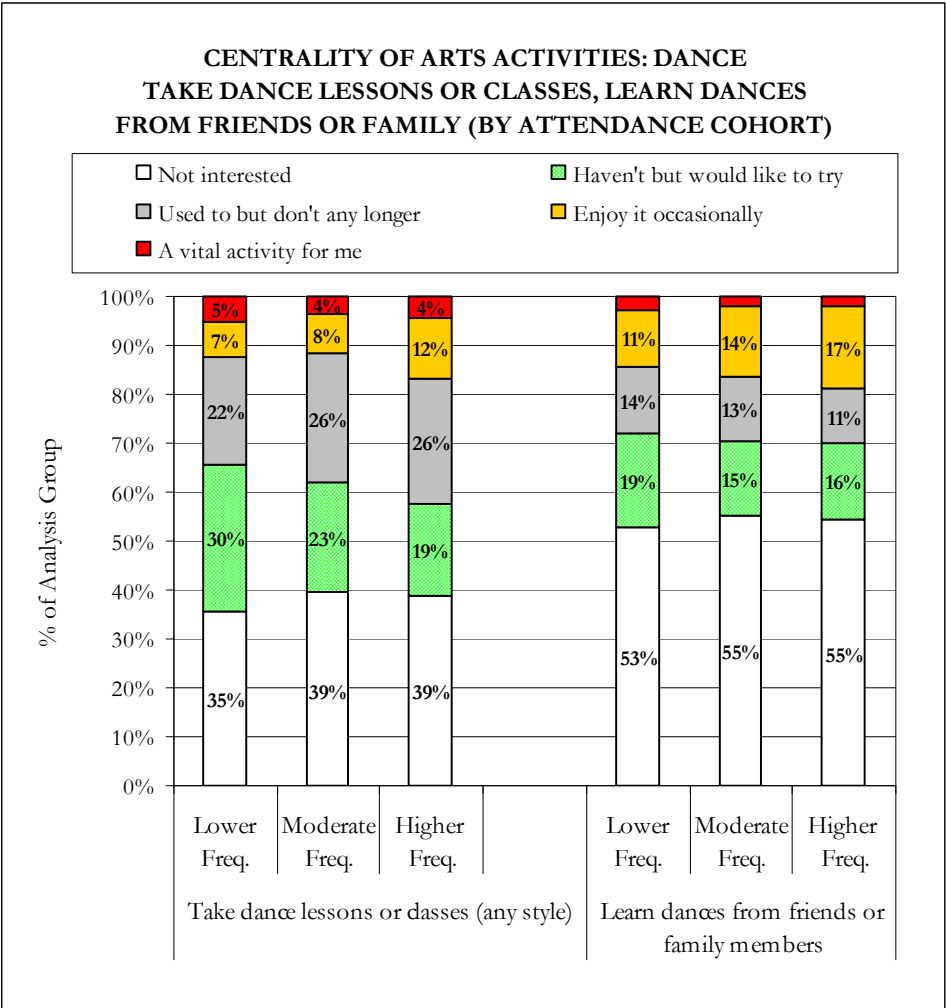
Centrality of Arts Activities: Dance



- Generally, respondents reported low centrality levels for dance activities, with the exception of attending performances by dance companies, which 14% of respondents cited as “a vital activity” and another 46% cited as something that they “enjoy occasionally.”
 - Compared to theater attendance, roughly half as many respondents identified dance attendance as a “vital activity” (14% vs. 29%, respectively), while 40% of respondents said that attending music concerts was a “vital activity.”
- High levels of past participation and latent interest were observed for “taking dance lessons or classes” (24% and 25%, respectively), while only 13% report that it is a current activity at some level.
 - This provides another example of unfulfilled interest participatory arts activities.
- High latent interest was also expressed for “attending community ethnic or folk dances” – an activity with important social and cultural dimensions



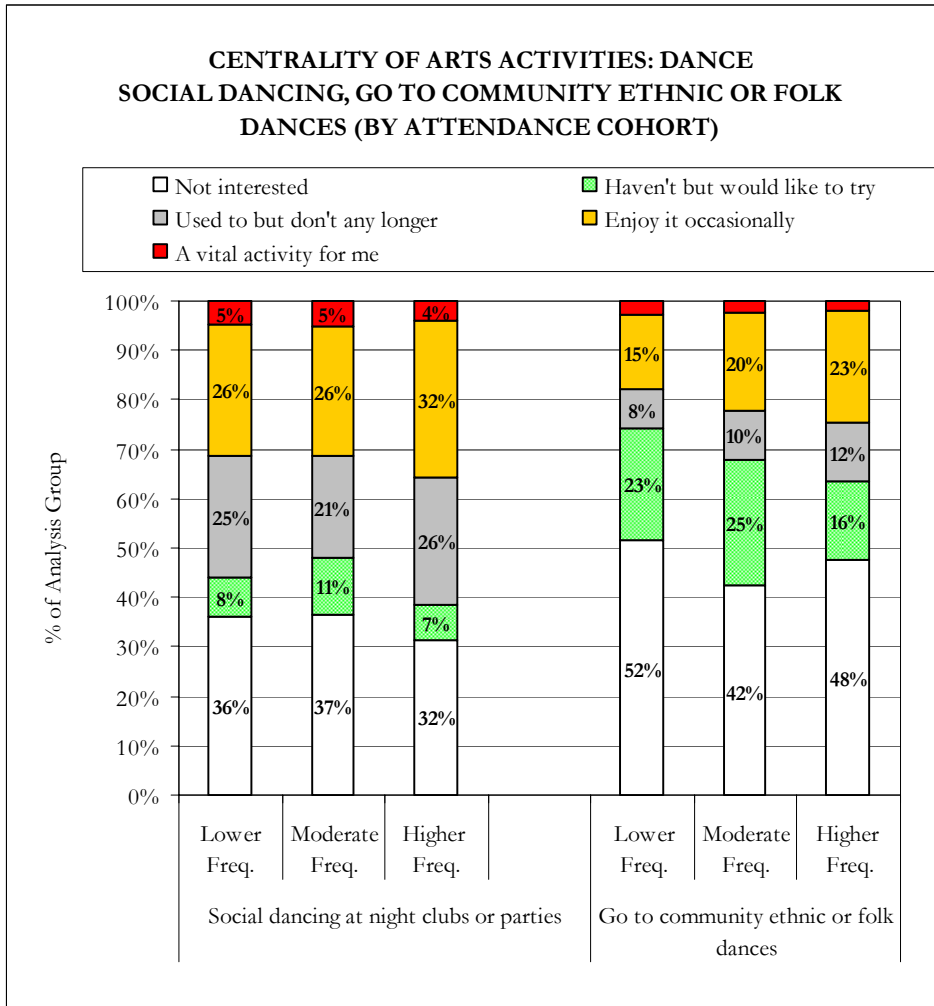
Centrality of Arts Activities: Dance



- While respondents indicated low levels of current engagement in dance lessons, they reported relatively high levels of past activity in this area (i.e., ‘used to, but don’t any more’), suggesting some level of familiarity with the art form and capacity to re-engage with this activity.
- Notice how latent interest in taking dance lessons is substantially higher among lower-frequency attendees, indicating that participatory dance activities can reach a cross-section of the public and serve as a potential entry point into the arts.
- The survey also asked about informal dance instruction – learning dances from friends or family members – which reinforces the same finding, and suggests an interest in both formal and informal dance participation.



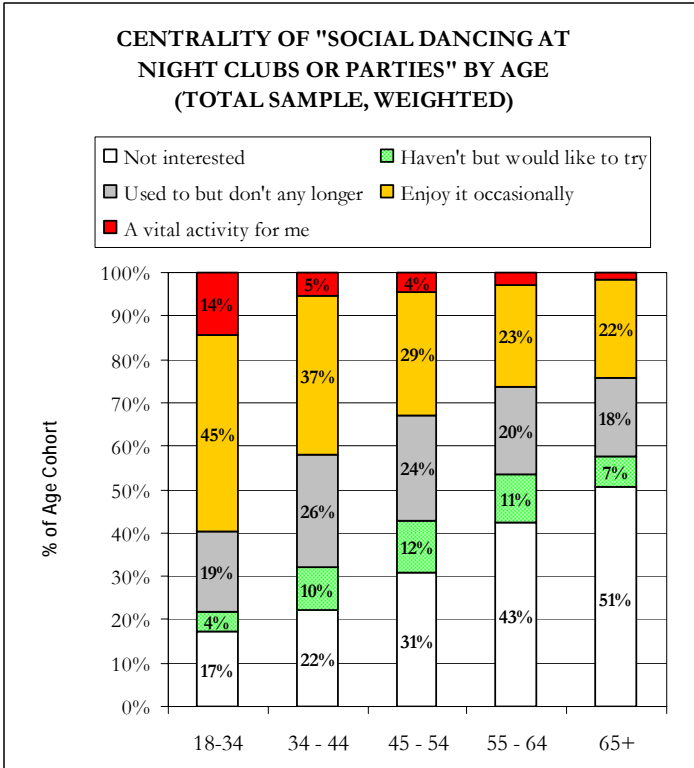
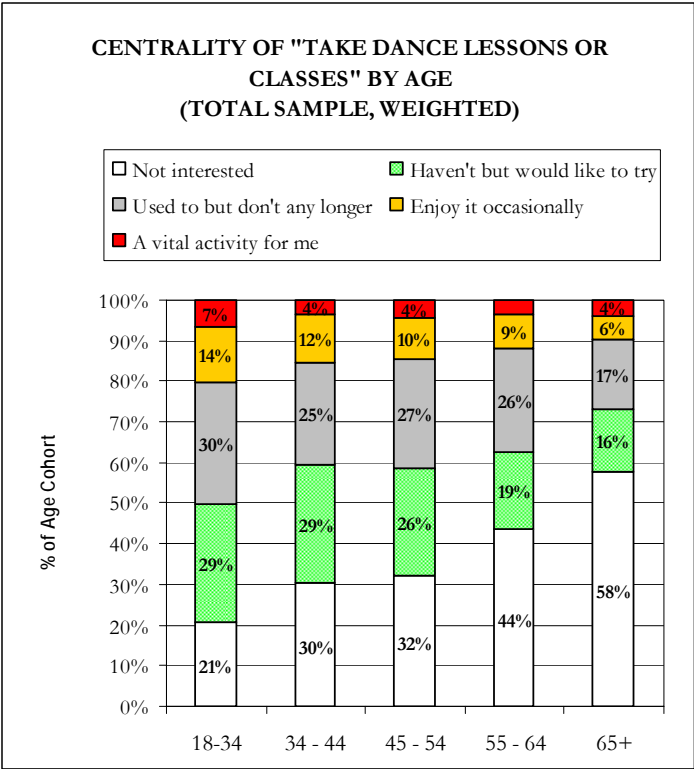
Centrality of Arts Activities: Dance



- “Dancing socially at night clubs or parties” is a current activity for about a third of all respondents across all three frequency cohorts, although relatively few respondents indicated unfulfilled interest.
 - Another 25% of respondents indicated that they've hung up their dancing shoes for good.
- While very few people report that going to “community ethnic or folk dances” is a current activity, there is a moderately high level of latent interest here.
 - The way this question is worded, it does not necessarily imply dancing on the part of the respondent, but merely attendance at community dances, which again illustrates the attractiveness of arts activities with a social dimension. This is particularly true for the lower- and moderate-frequency groups.



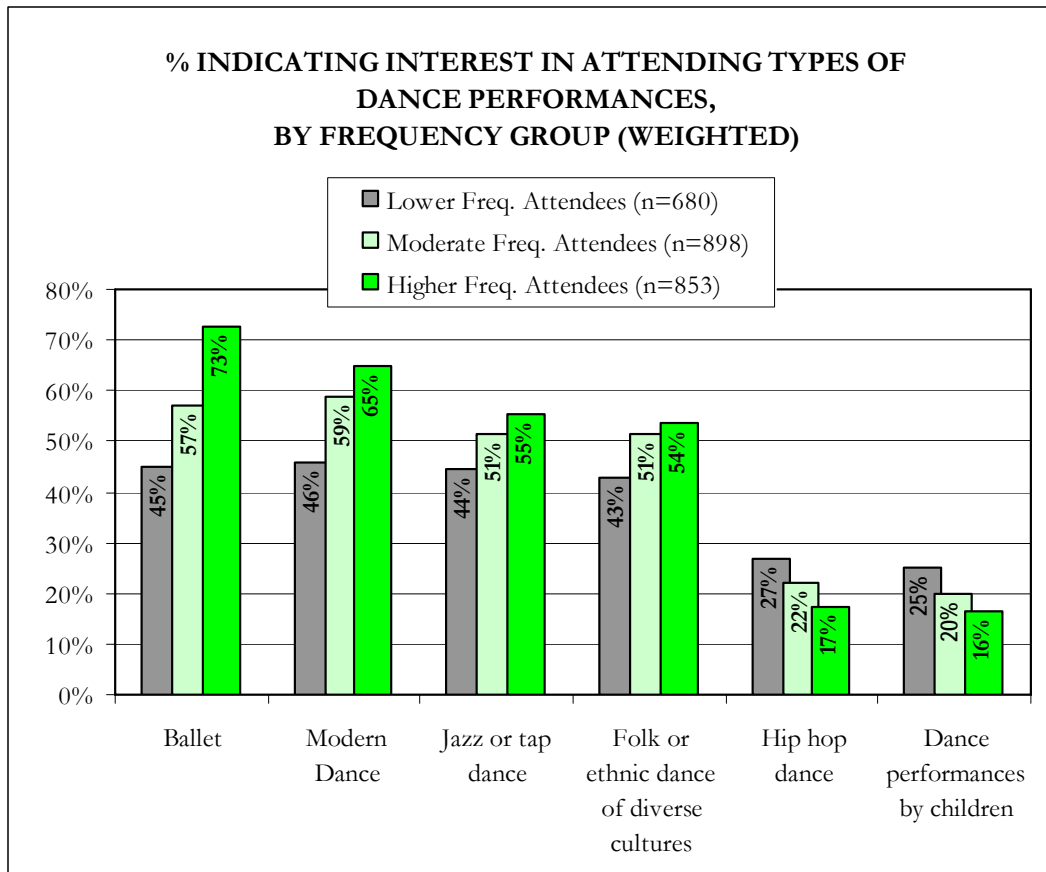
Centrality of Arts Activities: Dance



- Younger respondents reported notably higher centrality levels for “taking dance lessons or classes” as well as for “social dancing.”
 - One might infer an opportunity to interest younger residents in dance classes that also involve opportunities for social dancing.
- Respondents in the 65+ age cohort were twice as likely as respondents in the 18-34 age cohort to be vitally interested in attending dance performances (22% vs. 11%, respectively).
- It was also observed that nonwhite respondents generally reported higher centrality levels for participatory and social dance activities.



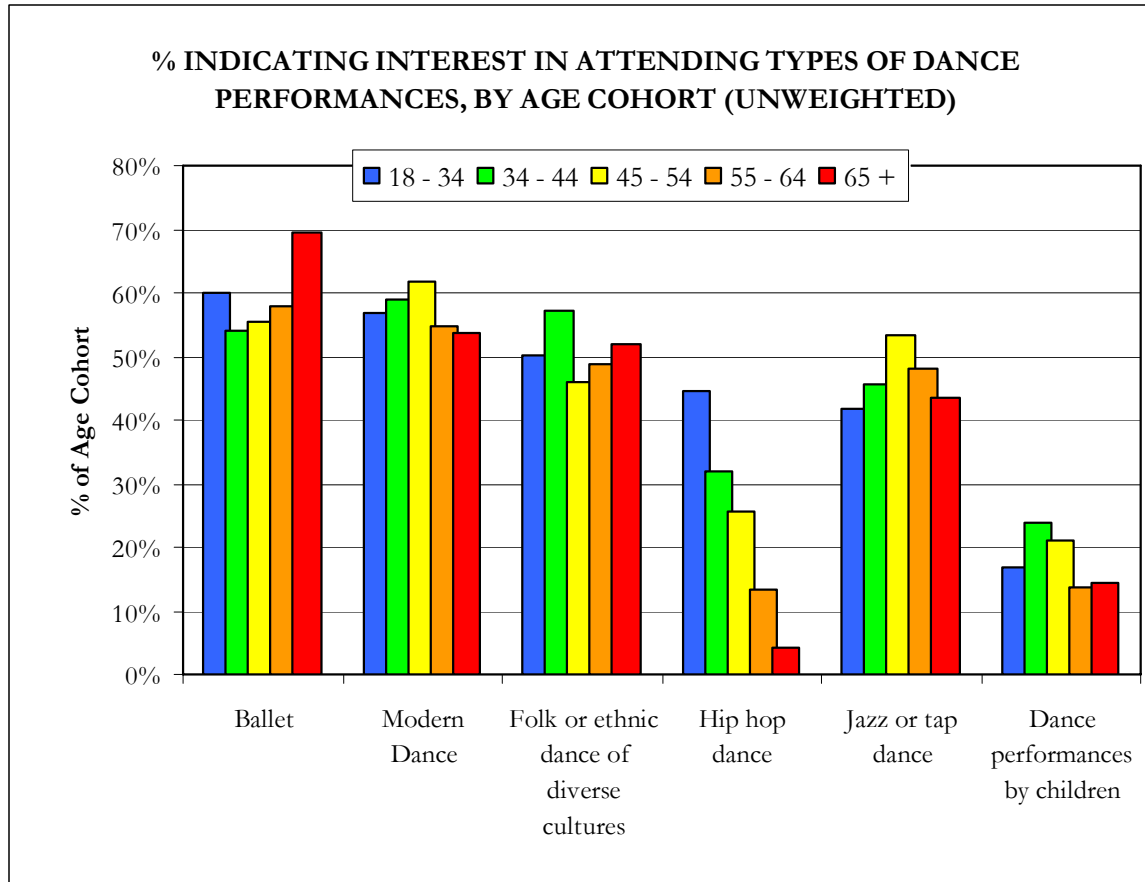
Interest in Types of Live Dance Performances



- As a follow-up to the module of questions about dance, respondents were asked “what types of dance performances, if any, are you interested in attending?” (In the chart at left, results are reported in descending order for the higher-frequency cohort.)
- Note the large disparity of interest between respondents in the lower and higher frequency cohorts for ballet and modern dance, the two genres of dance generally considered to be “high art.”
- Interest in “folk or ethnic dance of diverse cultures” is more equal across the cohorts, suggesting that performances of this nature are more likely to have a broader appeal.
- Also, note that interest in “hip hop dance” and “dance performances by children” is inversely related to frequency, suggesting opportunities to engage a broader and more diverse audience.
 - Compared to white respondents, nonwhite respondents reported higher levels of interest in “hip hop dance” (31% vs. 20%, respectively).



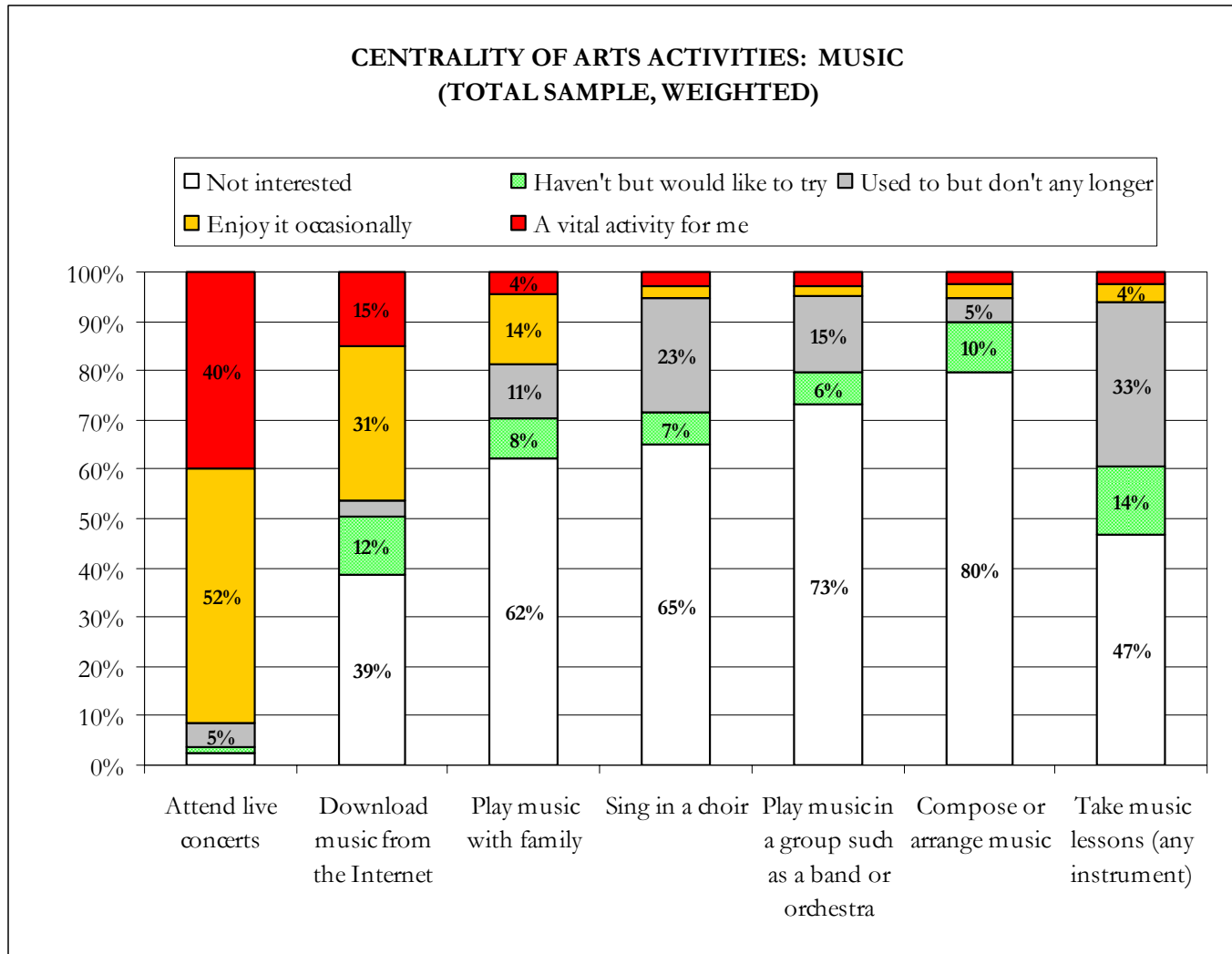
Interest in Types of Live Dance Performances



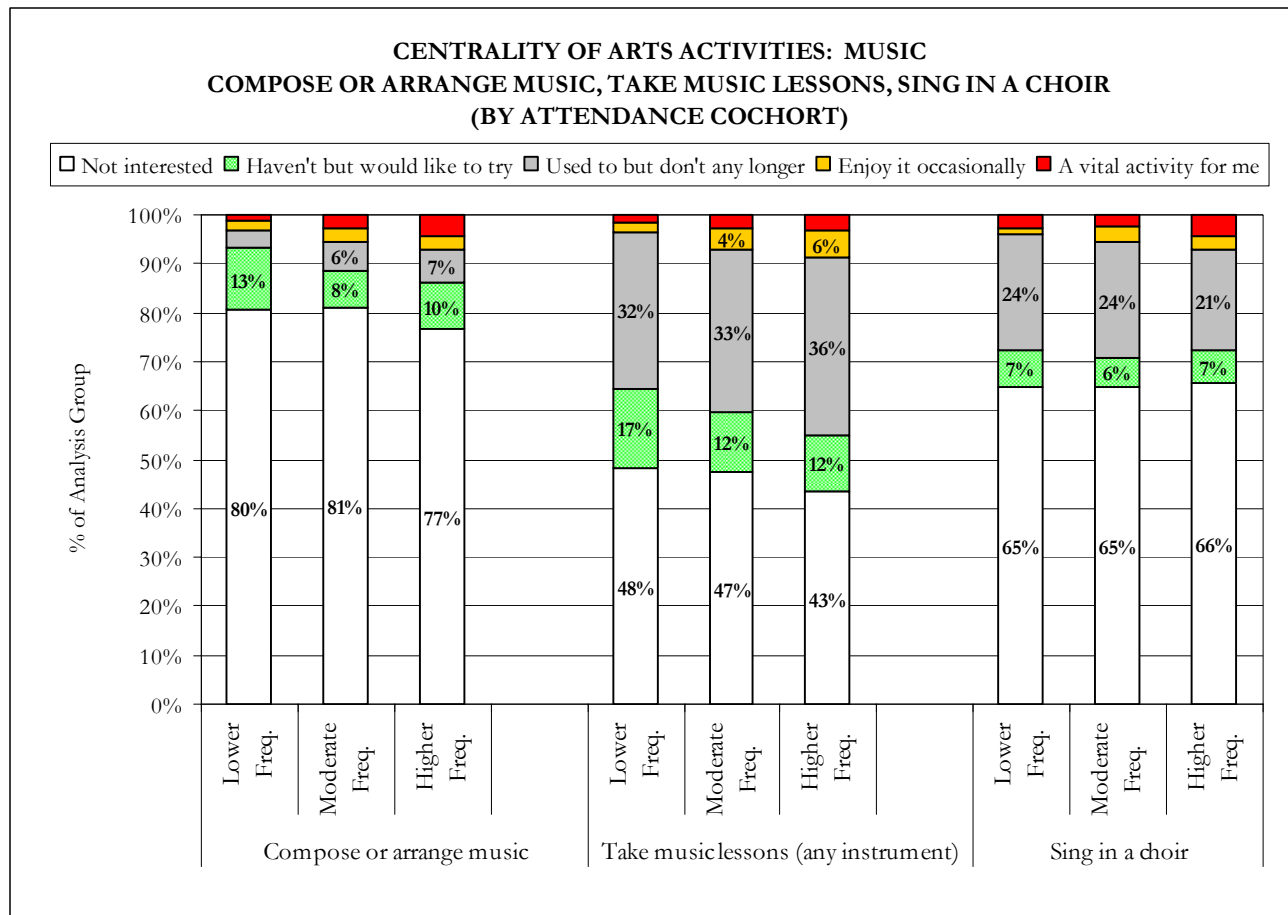
- Further analysis of the dance data shows some intuitive patterns with respect to age.
- Note especially the high level of interest in attending “hip hop dance” performances among younger respondents.
 - Hip hop dance is a staple in the cultural diet of young Americans, through music videos, live concerts and, most remarkably, in the new reality television shows such as “So you think you can dance?” As a result, we are seeing a surge of interest and active participation in dance among young people.



Centrality of Arts Activities: Music



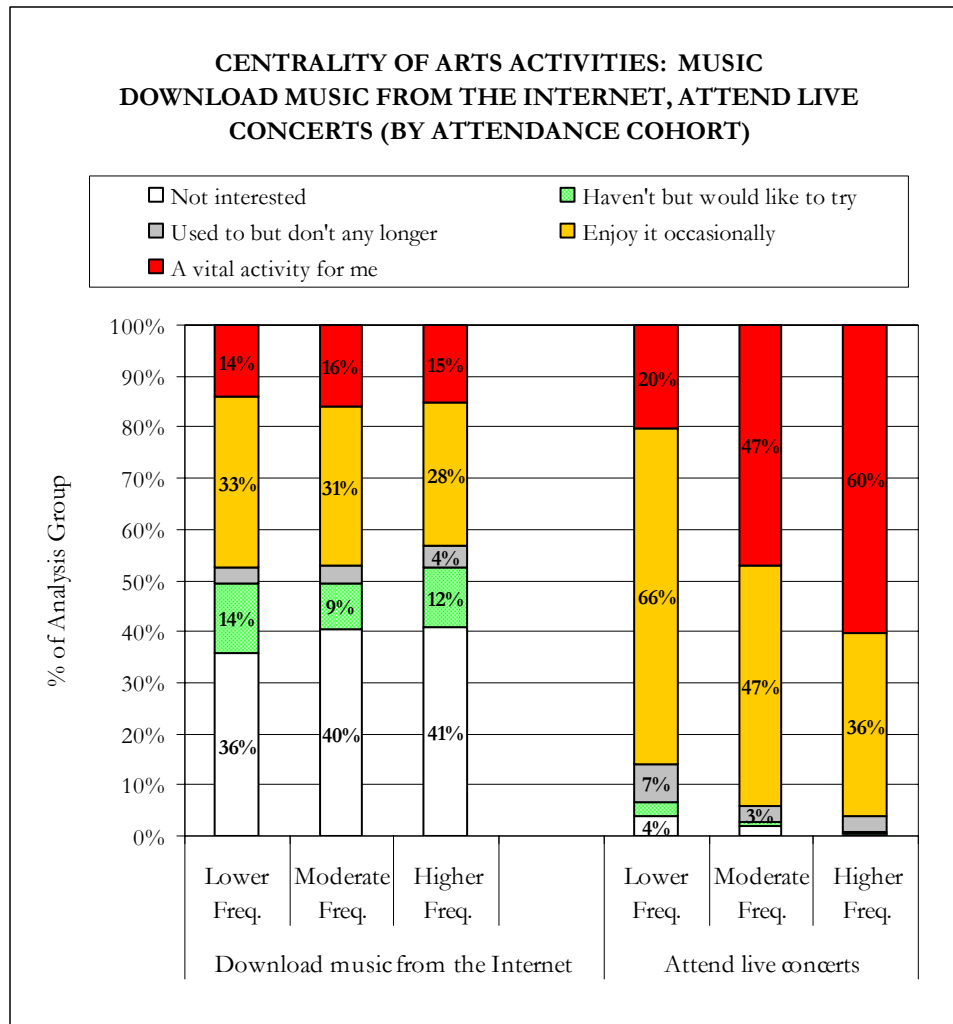
Centrality of Arts Activities: Music



- As might be expected, inventive forms of music participation (i.e., composing or arranging music) are central to a relatively small percentage of people, although the levels of latent interest nearly equal the levels of current participation.
- Very few adults are currently taking music lessons, although much larger percentages ‘used to, but don’t any longer’ (about 33%), and another 14% say that they’re interested in taking music lessons, but haven’t tried it.
 - What types of programs might encourage residents to dust off their instruments and start playing again? Some interesting work is being done in this vein in the U.K. (e.g., the Sage Gateshead’s “Cobweb Orchestras”)
- Responses for “sing in a choir” demonstrate a similar pattern. A quarter of all respondents, presumably, can read music and enjoy singing.
- Note, once again, that the centrality levels of participatory forms of engagement are equally strong across the frequency cohorts.



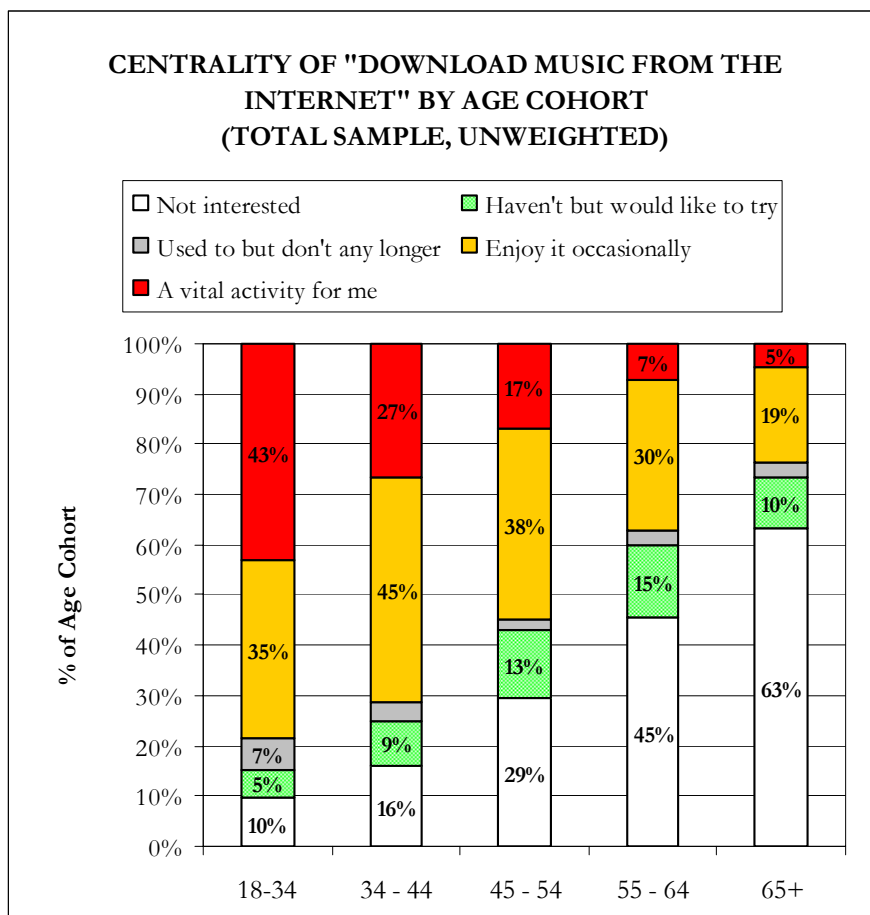
Centrality of Arts Activities: Music



- “Attending live concerts” is a current activity for almost all respondents, although significant differences are observed across the frequency cohorts with respect to the proportion that consider it “a vital activity.”
 - Again, this relates to the definition of the cohorts, but also may be attributed to underlying demographic factors like income and educational attainment.
- Among the other music activities tested, respondents indicated the second highest centrality levels for “downloading music from the Internet” (a curatorial form of music participation). Centrality levels for this activity are equally strong across the frequency cohorts.
 - Nonprofit music groups have struggled to design educational programs that involve downloading and compiling music, despite the fact that this activity has become central to the lives of millions of Americans.



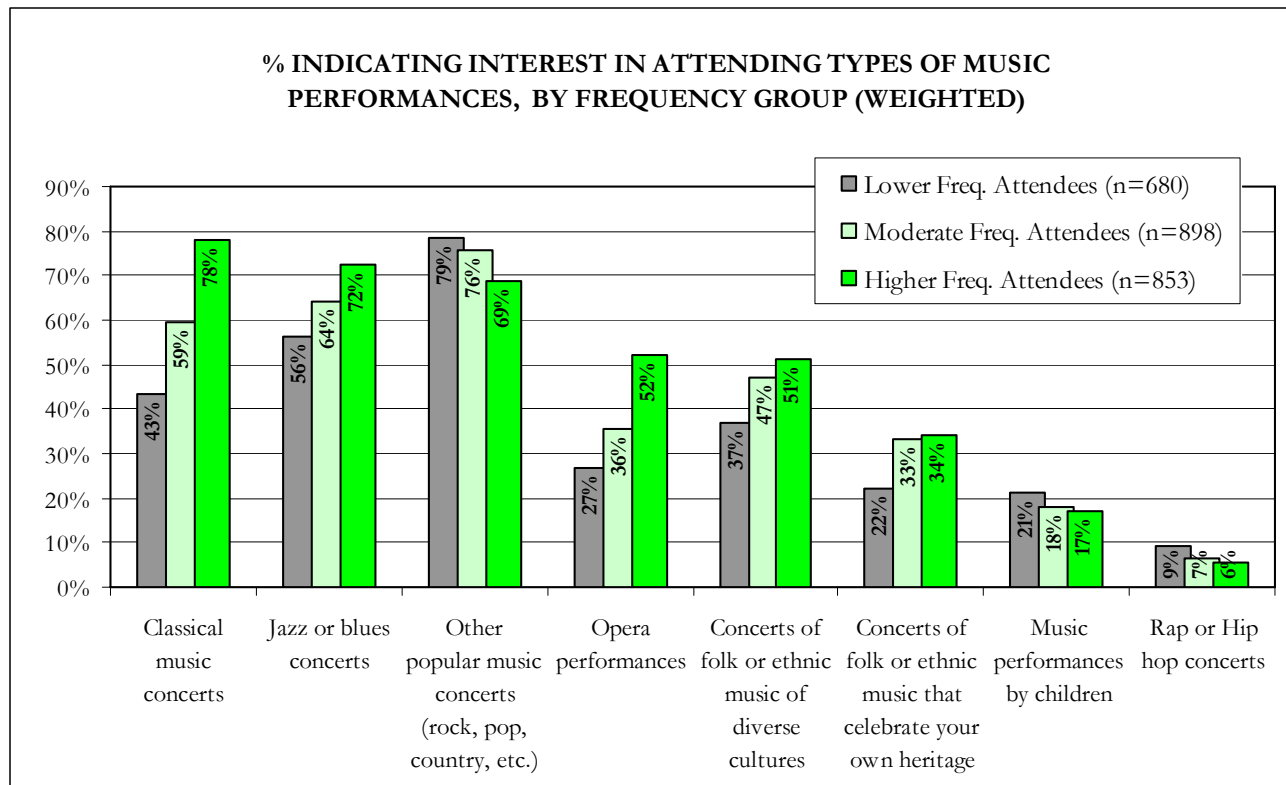
Centrality of Arts Activities: Music



- Further investigation illustrates the close correlation between age and interest in “downloading music from the Internet.”
- With respect to centrality levels, downloading music nearly exceeds attending live concerts among the youngest age cohort. As this group of consumers age, their downloaded music collections will only grow.
 - Note that respondents in the middle age cohorts indicate a moderate level of latent interest in downloading music, suggesting a possible point of engagement/ reinforcement for arts organizations.
- Differences in centrality of music activities between white and nonwhite respondents were not significant.



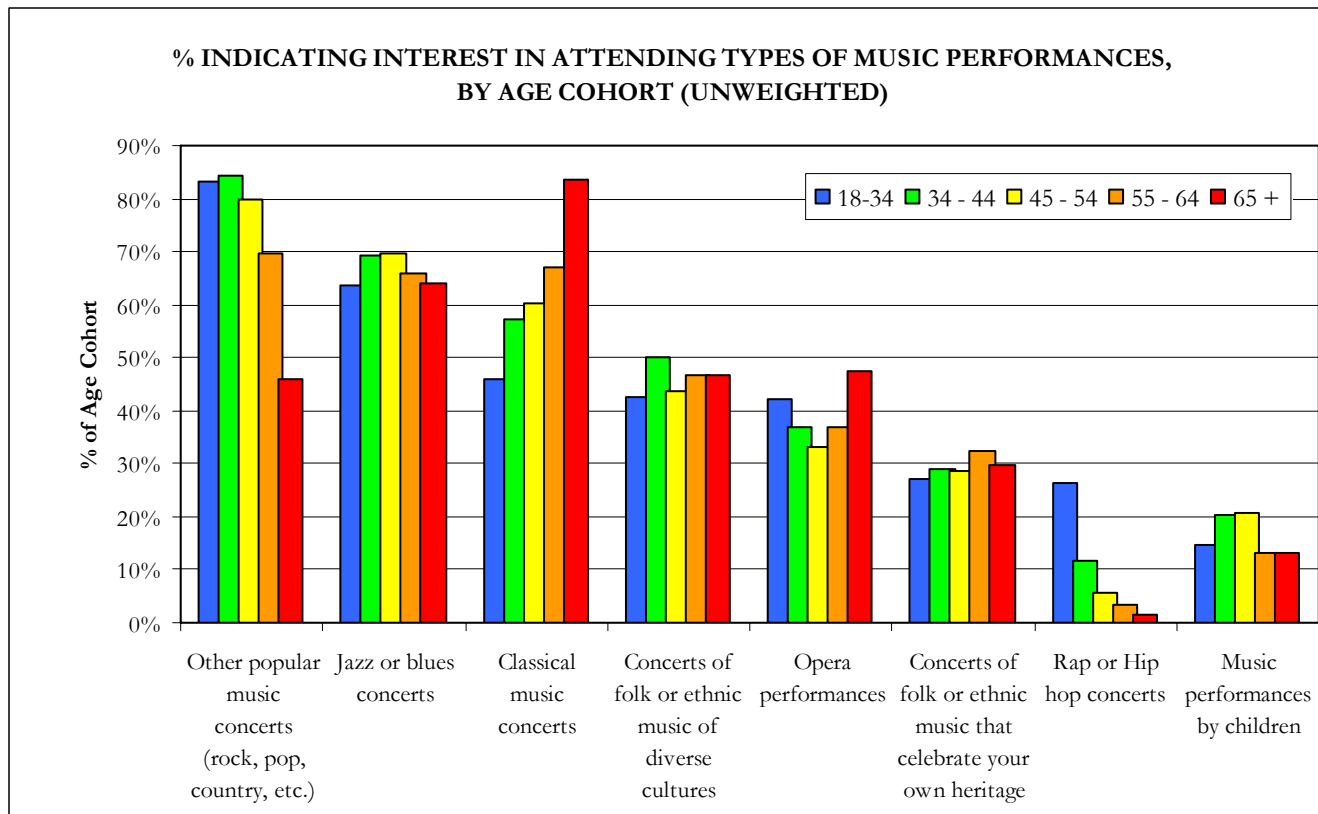
Interest in Types of Live Music Performances



- As a follow-up to the module of questions about music activities, respondents were asked “what kind of music performances, if any, are you interested in attending?” (In the chart at left, results are reported in descending order for the higher-frequency cohort.)
- The patterns are similar to those observed for dance, with the largest disparity between frequency cohorts occurring for the high art forms of classical music and opera.
- Lower-frequency cohorts demonstrate more interest than higher-frequency cohorts in popular music. Still, interest in popular music is about as high as interest in jazz or blues for higher-frequency respondents.
- It is interesting to note how respondents, on average, reported much higher levels of interest in attending hip hop dance performances compared to hip hop music performances.
- Compared to white respondents, nonwhite respondents indicated much higher levels of interest in attending “concerts of folk or ethnic music that celebrate your own heritage” (28% vs. 46%, respectively), suggesting the importance of culturally relevant programming in attracting diverse audiences.



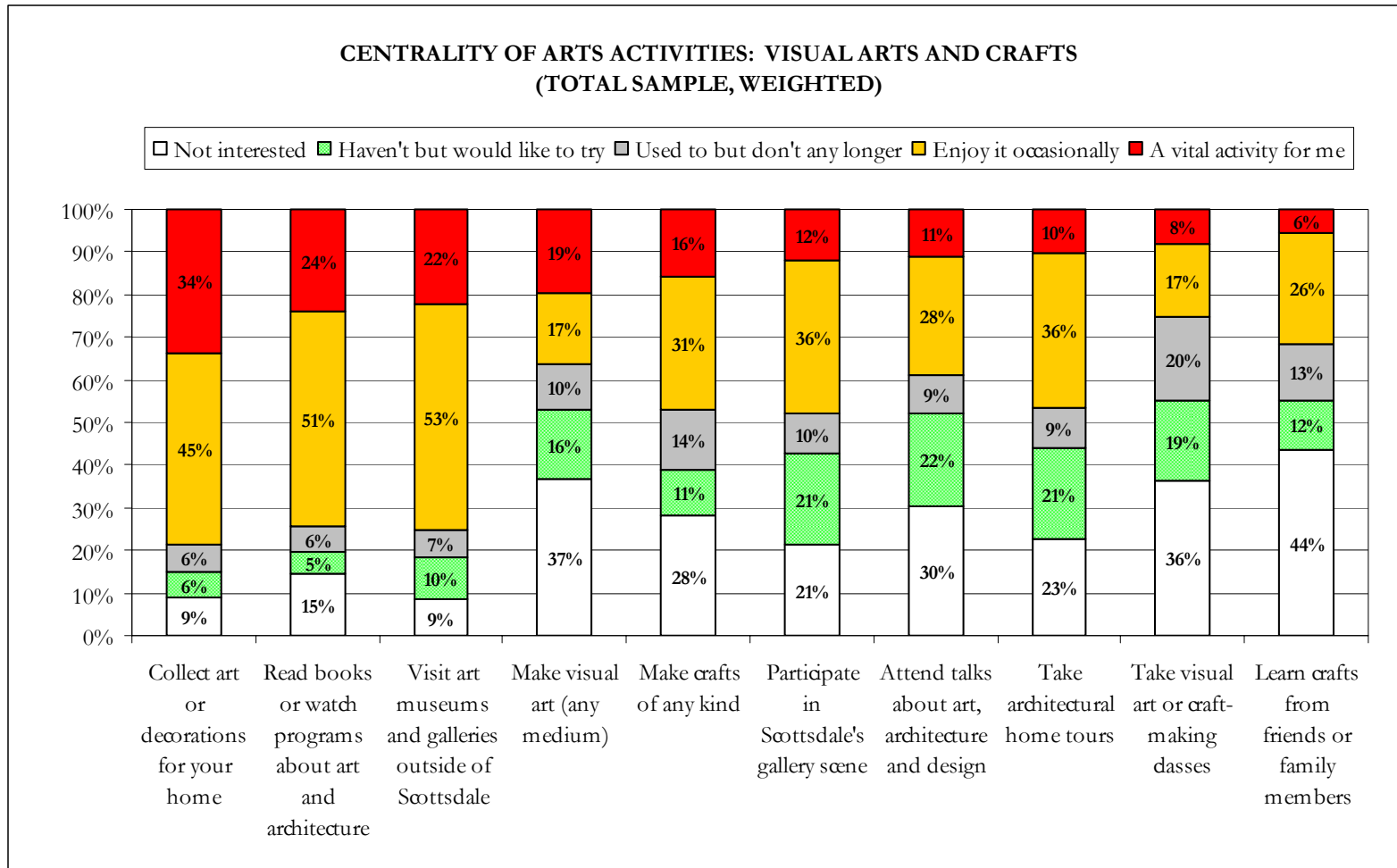
Interest in Types of Live Music Performances



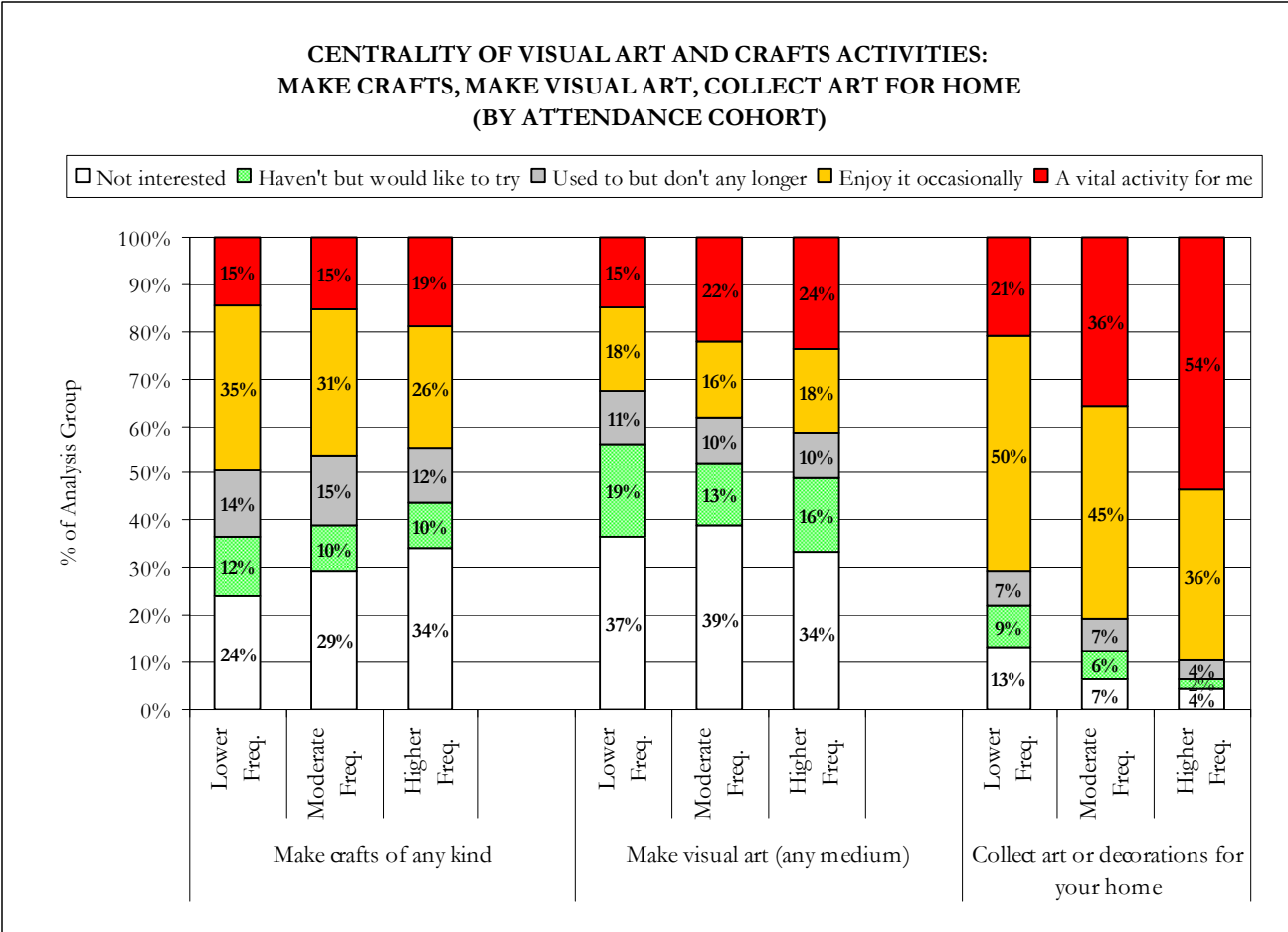
- Further analysis by age cohort reveals patterns for interest in attending types of music performances. Note especially:
 - Popular music concerts are most popular among the 18-34 cohort by a wide margin.
 - Interest in “jazz or blues concerts” is nearly equal across the age cohorts, suggesting that it is one of the few music genres that can bridge generations. At a lower level, the same is true for “concerts of folk or ethnic music that celebrates your own heritage.”
 - Interest in classical music increases with age, and spikes for the oldest age cohort, while interest in opera is strong among both younger and older respondents
 - Interest in attending “Rap or Hip Hop concerts” is mostly limited to respondents in the youngest age cohort
- Results paint a pretty clear picture of generational shifts in music preferences, and the blurring lines between music genres, especially among young people.



Centrality of Arts Activities: Visual Art and Crafts (Summary)



Centrality of Arts Activities: Visual Art and Crafts



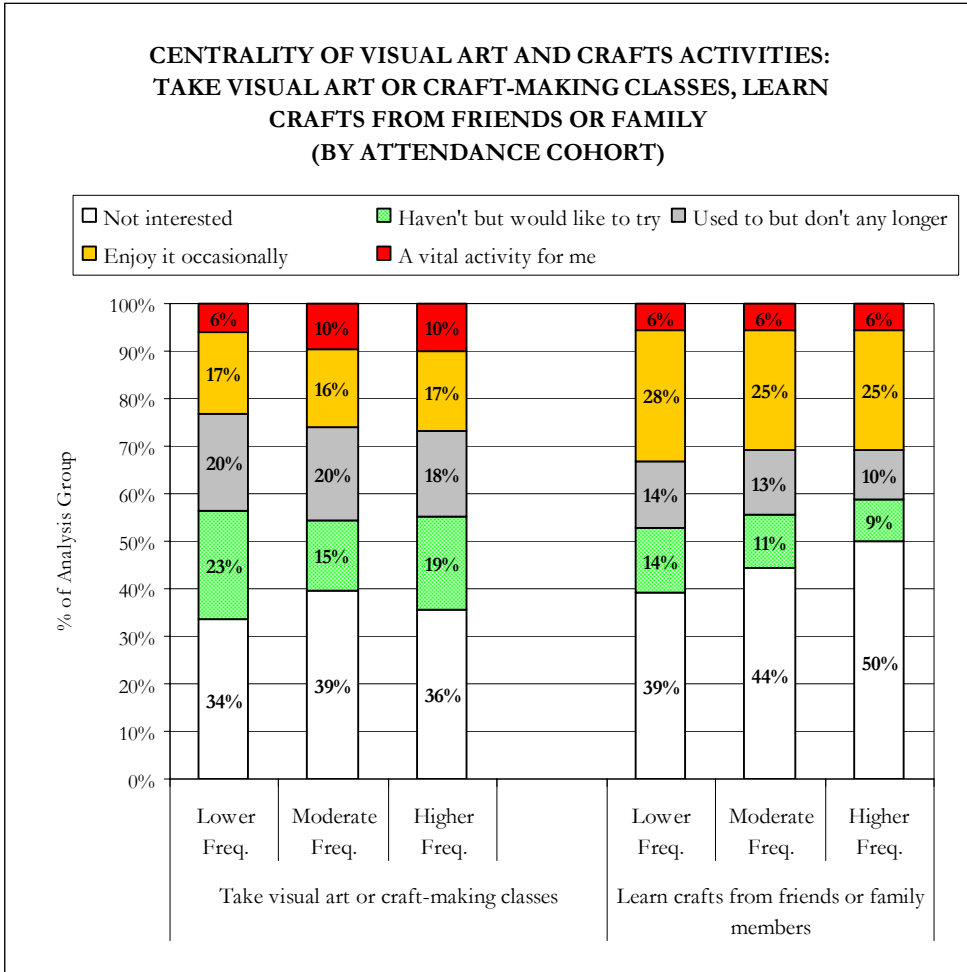
- Of all the visual art and craft activities tested, “collecting art or decorations for the home” was given the highest centrality levels, on average, although it is far more central to those in the higher frequency cohort, compared to those in the lowest cohort (54% vs. 21% “a vital activity,” respectively).

- How can arts organizations, particularly museums, be relevant to people in their homes, if collecting art is such a valued form of participation?

- Compare the centrality figures for making crafts and making visual art, and note the subtle differences. Centrality levels for “making crafts of any kind” are consistent across the frequency cohorts, while the pattern is different for “making visual art (any medium).”



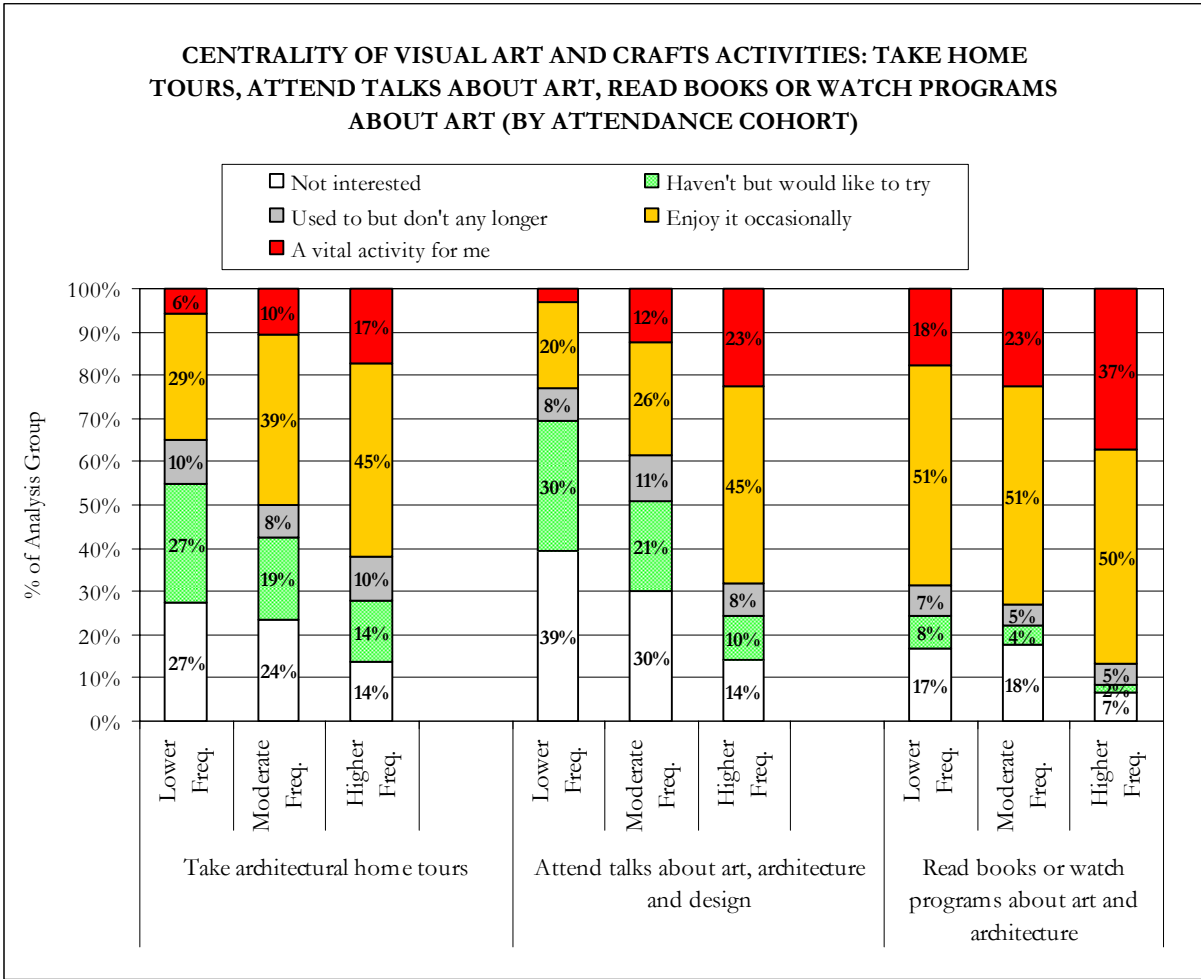
Centrality of Arts Activities: Visual Art and Crafts



- Moderately high levels of latent interest were reported for “taking art or craft-making classes,” with the highest figure reported by respondents in the lower frequency cohort (23%).
- Additionally, nearly a quarter of all respondents have some history taking visual art or craft-making classes.
- It is interesting to see that informal learning around crafts (i.e., “learning crafts from friends or family members”) is somewhat more central an activity than formal learning around visual art or crafts (i.e., “taking visual art or craft-making classes”).
 - Results point to the added value of arts learning activities in a family context.



Centrality of Arts Activities: Visual Art and Crafts



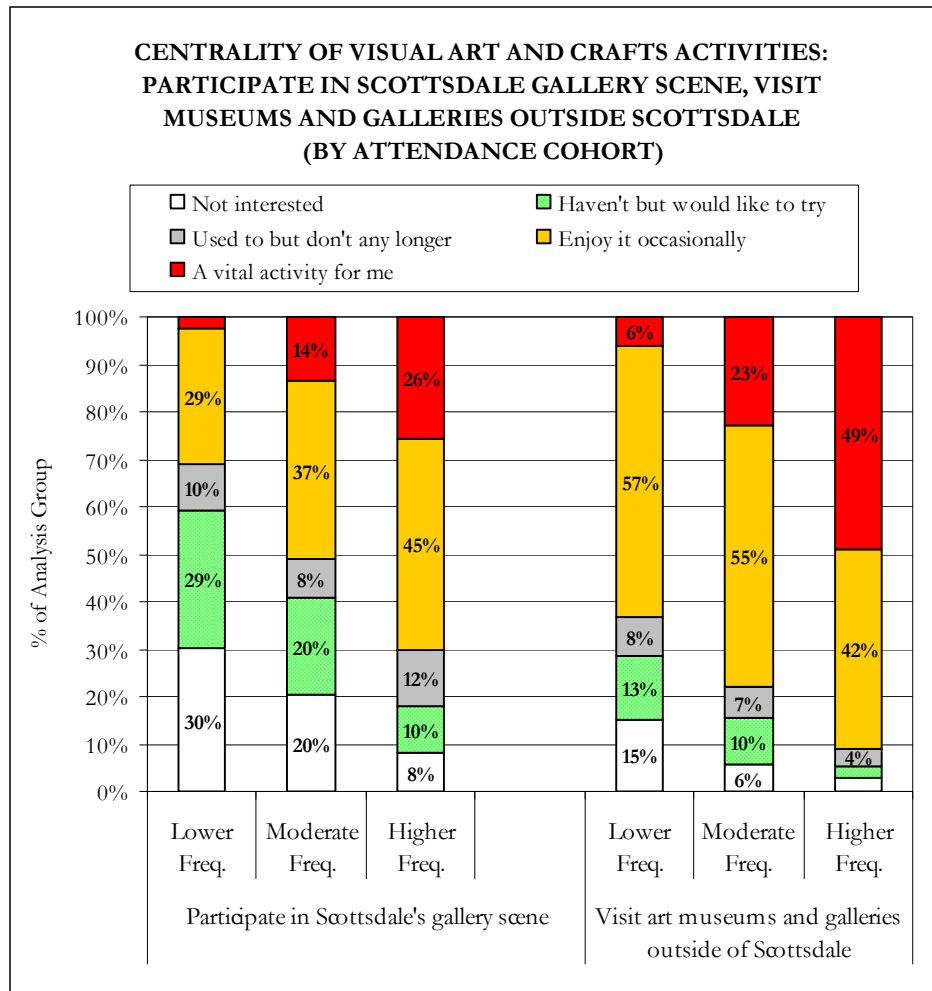
- Several other forms of participation were tested, and clear patterns are evident. Overall, centrality levels for “reading books or watching programs about art and architecture” are highest, while larger percentages of respondents also enjoy “taking architectural home tours” and “attending talks about art, architecture and design.”

- Results suggest that all of these activities play an important role in the public’s overall experience with the visual arts. Aside from public libraries, where can people go to read books about art?

- Notice how the centrality of these activities increases dramatically across the frequency cohorts. But also notice the extremely high levels of latent interest among lower frequency respondents, suggesting a strong appetite for engagement in these activities.



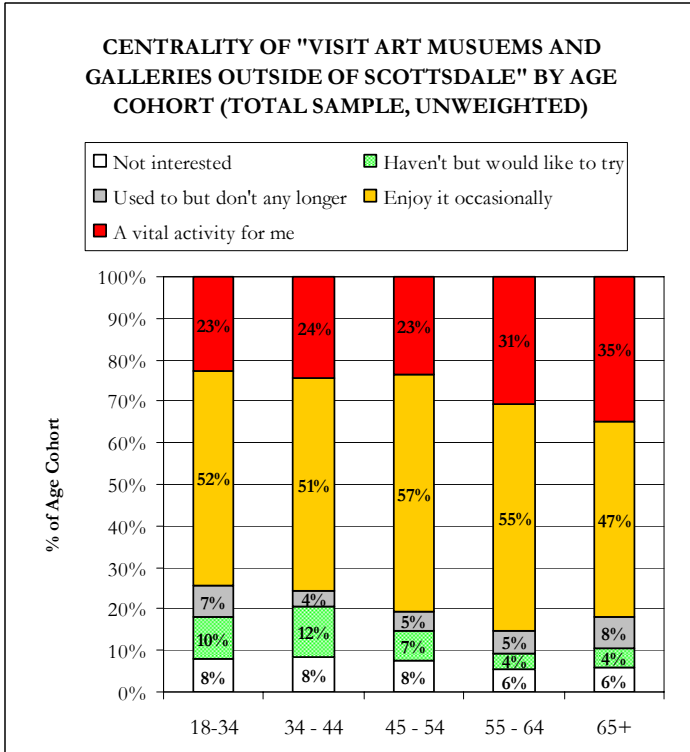
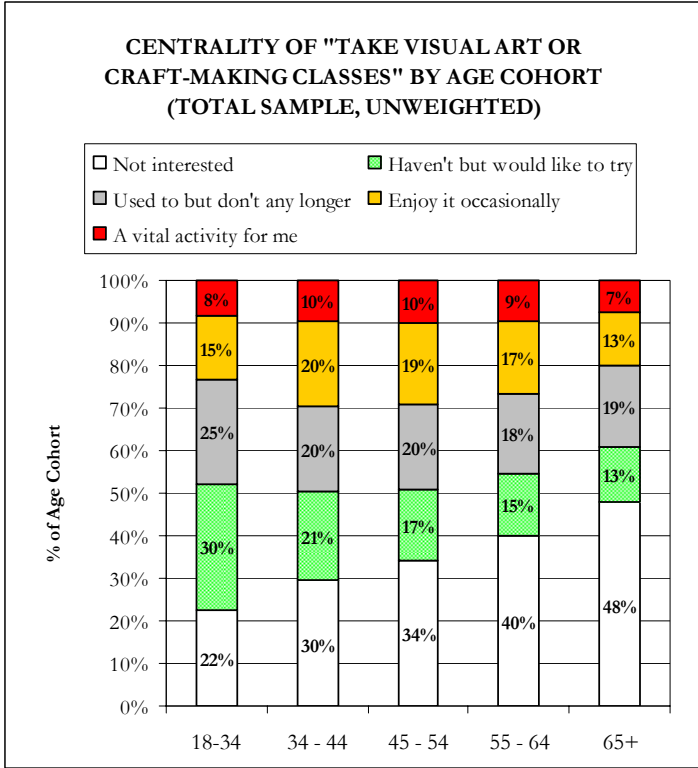
Centrality of Arts Activities: Visual Art and Crafts



- As would be expected, centrality levels for “visiting art museums and galleries outside of Scottsdale” rise significantly across the frequency cohorts.
 - This is due, in part, to the definition of the frequency cohorts.
 - These results and others illustrate that Scottsdale residents regularly participate in arts activities outside of Scottsdale, and that patterns of cultural participation do not follow political boundaries.
- Notice the similar pattern of centrality reported for “participating in Scottsdale’s gallery scene.” Very few respondents in the lower frequency cohort consider this “a vital activity,” although 29% say they enjoy it occasionally and, most significantly, another 29% say they “haven’t, but would like to try.”
 - Given that survey respondents are among the most culturally active adults in the area, one wonders why so many, even in the lower frequency cohort, would indicate latent interest in what is commonly regarded as Scottsdale’s signature (and most widely available) arts offering.



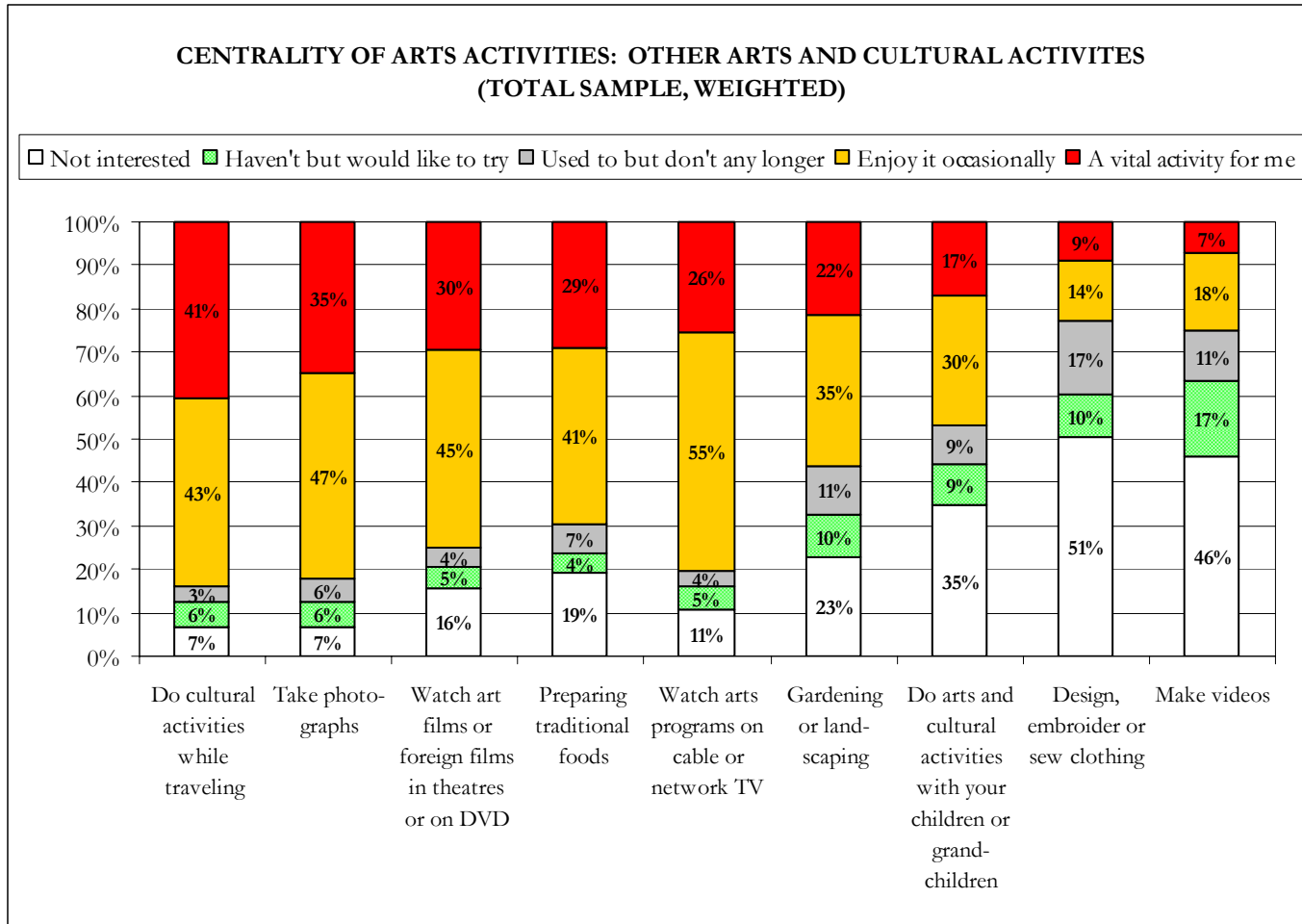
Centrality of Arts Activities: Visual Art and Crafts



- While current participation in arts and crafts classes is relatively stable across the age cohorts, respondents in the youngest age cohort reported significantly higher levels of latent interest (34%), suggesting an opportunity to engage and develop lifelong visual arts participants through participatory activities.
- Proportionately, respondents in the youngest age cohort are 35% less likely than respondents in the oldest age cohort to say that “visiting art museums and galleries outside of Scottsdale” is “a vital activity” (23% vs. 35%, respectively).
 - Lifestyle factors, changing tastes and other factors may contribute to this disparity, but the question of whether their participation will increase as they get older remains open.



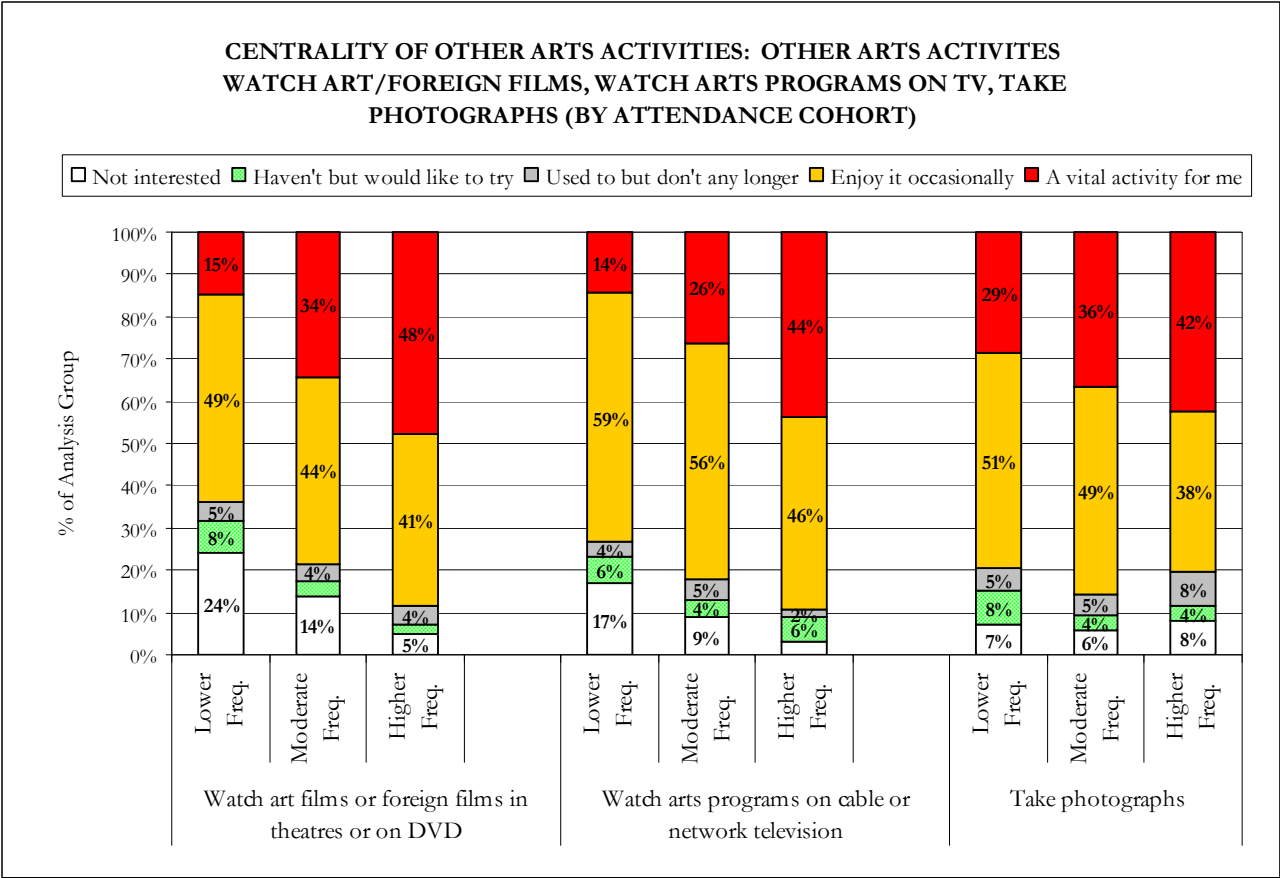
Centrality of Arts Activities: Other Cultural Activities (Summary)



- A small number of other arts activities were tested, including several forms of popular, informal and technology-based participation, many of which garnered very high centrality levels among respondents. Results are reported over the following few pages.



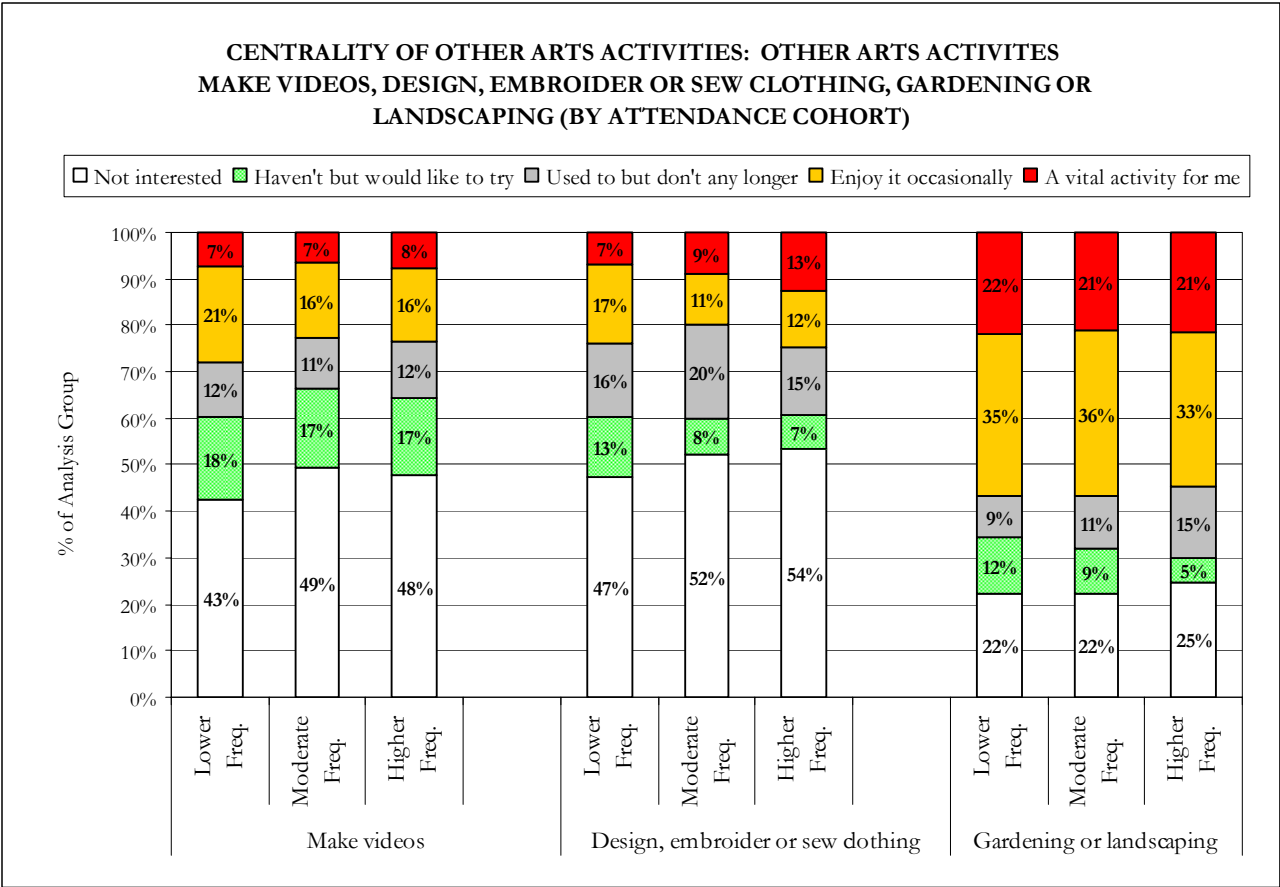
Centrality of Arts Activities: Other Cultural Activities



- “Watching art films of foreign films in theatres or on DVD” is “a vital activity” for 30% of all respondents, on average. This is approximately the same percentage of respondents who say that attending musicals and stage plays is “a vital activity,” suggesting a high level of demand for art film programs, especially among those who are already culturally active.
- “Taking photographs” was cited as one of the most central of all the activities tested, and the level of centrality is strong across the age cohorts, suggesting that this activity has reach as well as depth. This is consistent with other research that we have conducted, which illustrates one of the key ways in which the revolution in digital imaging has affected American culture.
 - Offering venues and opportunities to take, share and discuss personal photographs and the stories behind them can fulfill a deep need for personal expression at a very low threshold of technical skill, allowing for broad reach.



Centrality of Arts Activities: Other Cultural Activities



- Relatively modest levels of current participation were reported for “making videos” and “designing, embroidering or sewing clothing,” both of which require some level of technical skill and/or special equipment.

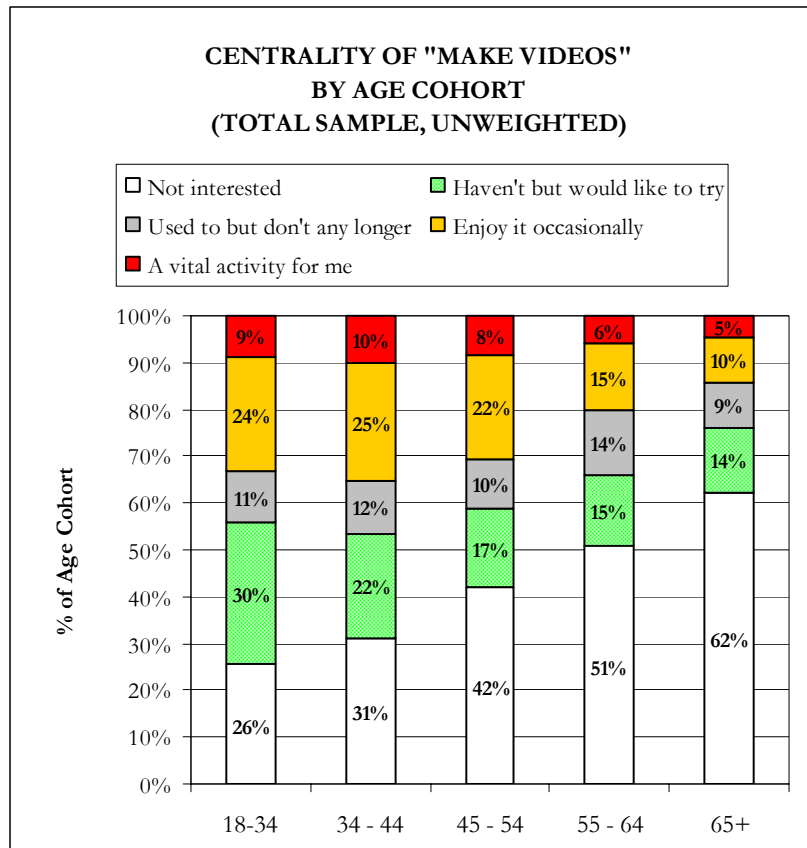
- Notice the moderately high levels of latent interest in “making videos.”

- Centrality levels for ‘gardening or landscaping’ are relatively high, and consistent across all frequency cohorts.

- The high levels of centrality attached to home-based creative activities (i.e., gardening, collecting art, designing attractive living spaces, etc.) illustrates a whole milieu of arts participation that has been overlooked, historically, in most important studies of arts participation. Should Scottsdale’s future cultural policies embrace the home as a setting for informal and self-guided arts and cultural activities, or should cultural policy focus on centralized facilities and formal programs?



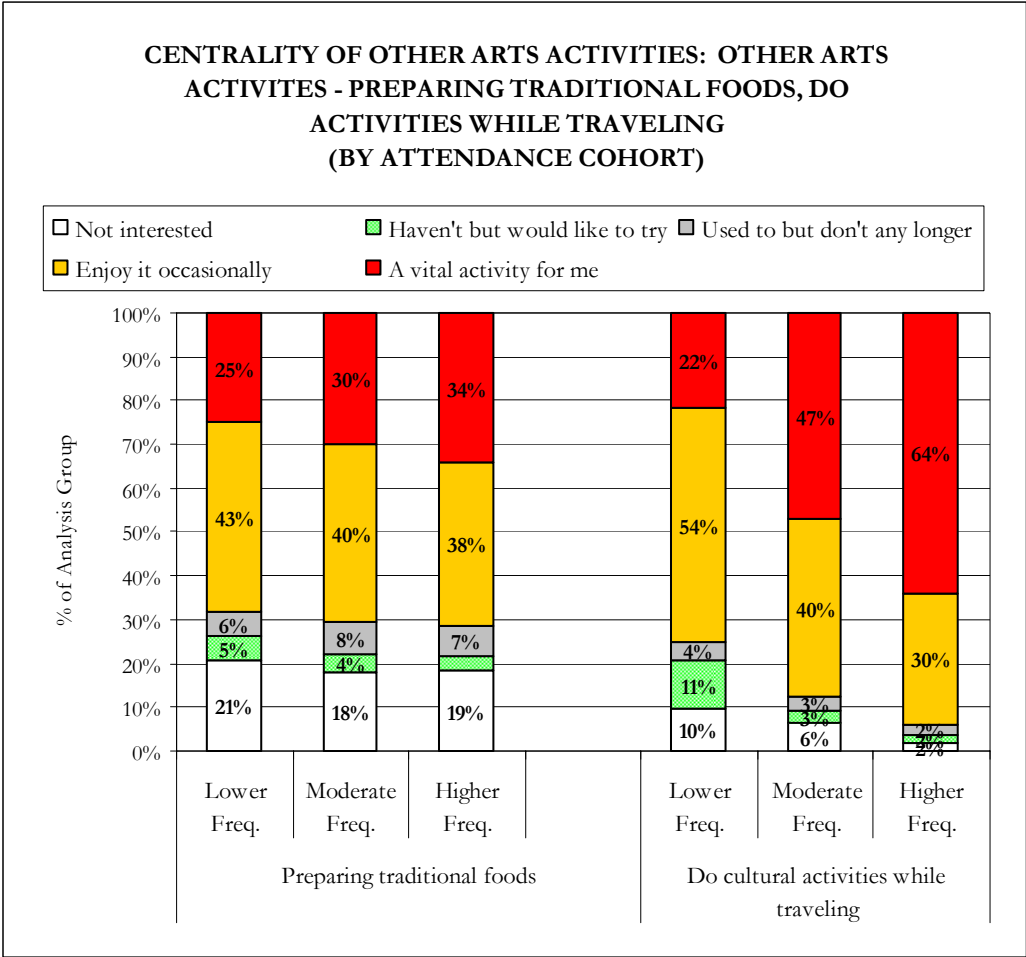
Centrality of Arts Activities: Other Cultural Activities



- Among the various popular, informal and technology-based activities surveyed, the younger age cohorts generally report significantly higher level of latent interest. These activities may be valuable points of entry or opportunities to create value for younger and harder-to-reach constituents.
- For example, the chart at left illustrate the age breakdown for “making videos.”
 - With advances in digital imaging technology, more pervasive availability of imaging technology (e.g., cell phones with video cameras), and the popularity of user-generated content websites like YouTube.com, centrality levels for “making videos” is bound to increase rapidly.
 - How can user-generated content benefit artists and arts organizations? This is one of the major issues facing the arts industry today.



Centrality of Arts Activities: Other Cultural Activities



- Nearly one in three respondents cited “preparing traditional foods” as “a vital activity,” with many more engaging in this activity occasionally, making it one of the most central activities among those surveyed, and an activity enjoyed equally across the frequency cohorts.
- “Doing cultural activities while traveling” was given exceptionally high centrality ratings, with a marked increase across the frequency cohorts (i.e., people with money who travel).
 - Although it may seem counterintuitive, this finding suggests further consideration of arts programs that encourage or facilitate out-of-town arts activities, perhaps in a way that enriches local participation at the same time.
 - In reverse, logic follows that arts and cultural activities should appeal to tourists and travelers who are visiting Scottsdale.

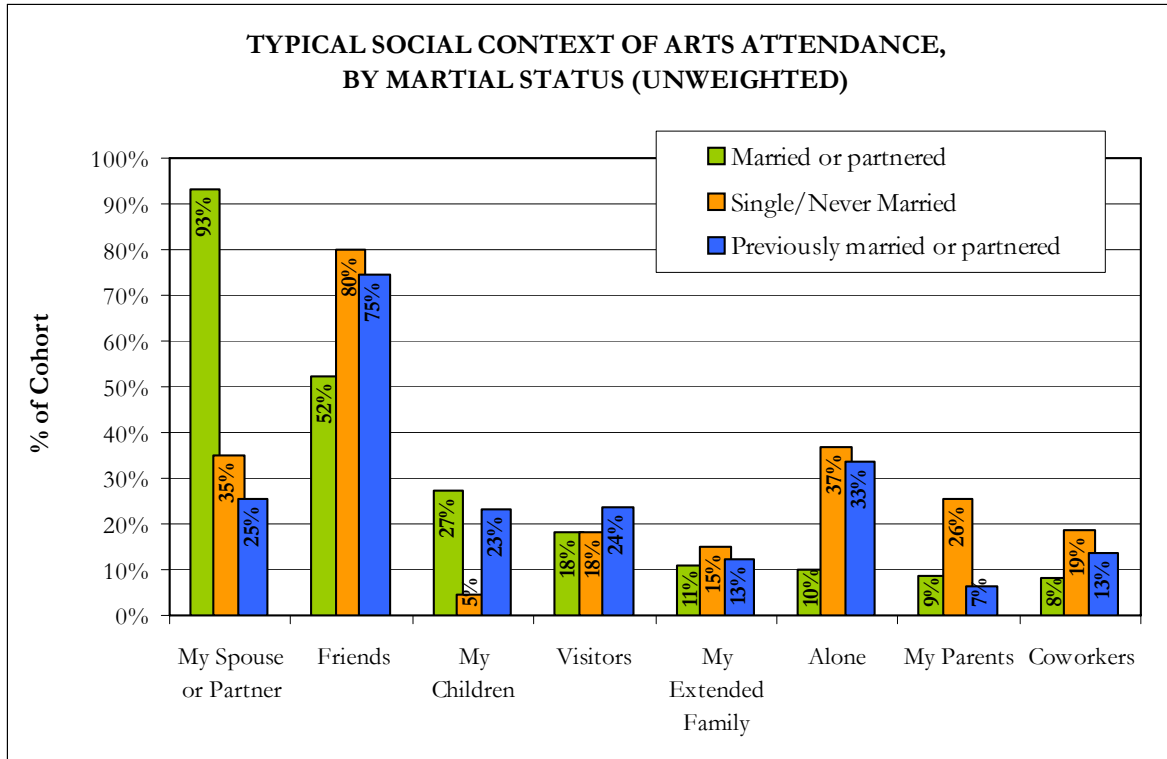




Social Context and Sources of Information



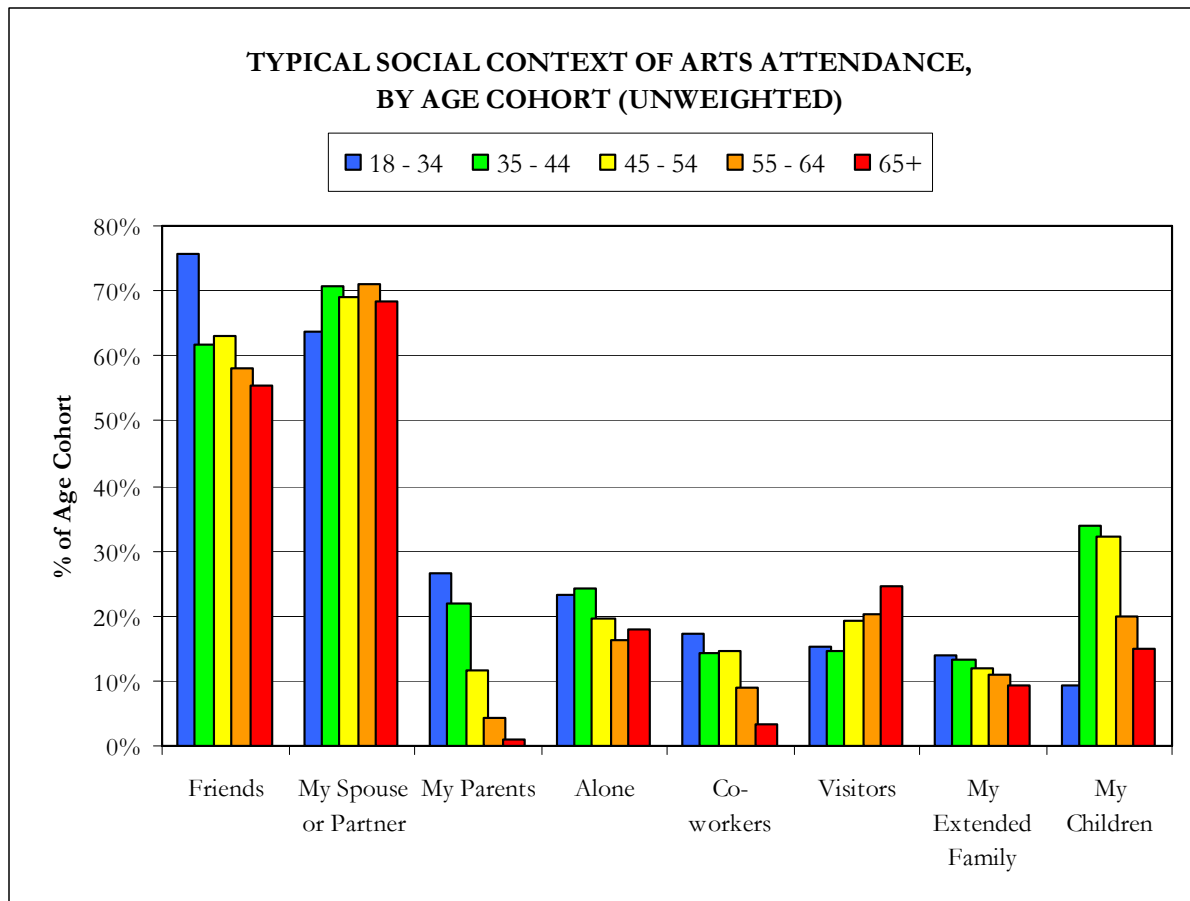
Social Context Surrounding Attendance



- Respondents were asked “Typically, who is with you when you go out to cultural programs?” As can be seen in the chart at left, social context varies dramatically by marital status.
- While nearly all respondents who are married or partners attend with “my spouse or partner” (93%), over half also typically attend with friends (52%). Respondents who are single/never married, on the other hand, are more likely to attend with “friends” (80%), followed by “alone” (37%) and with “my spouse or partner” (35%).
 - More and more research points rising expectations for socially-fulfilling arts experiences, particularly among singles.
- It is interesting to note the high percentage of respondents who are either single or previously married who say that they typically attend alone. This bears further investigation. (Overall, single respondents account for 15% of the total sample, while previously married respondents account for 22% of all respondents.)



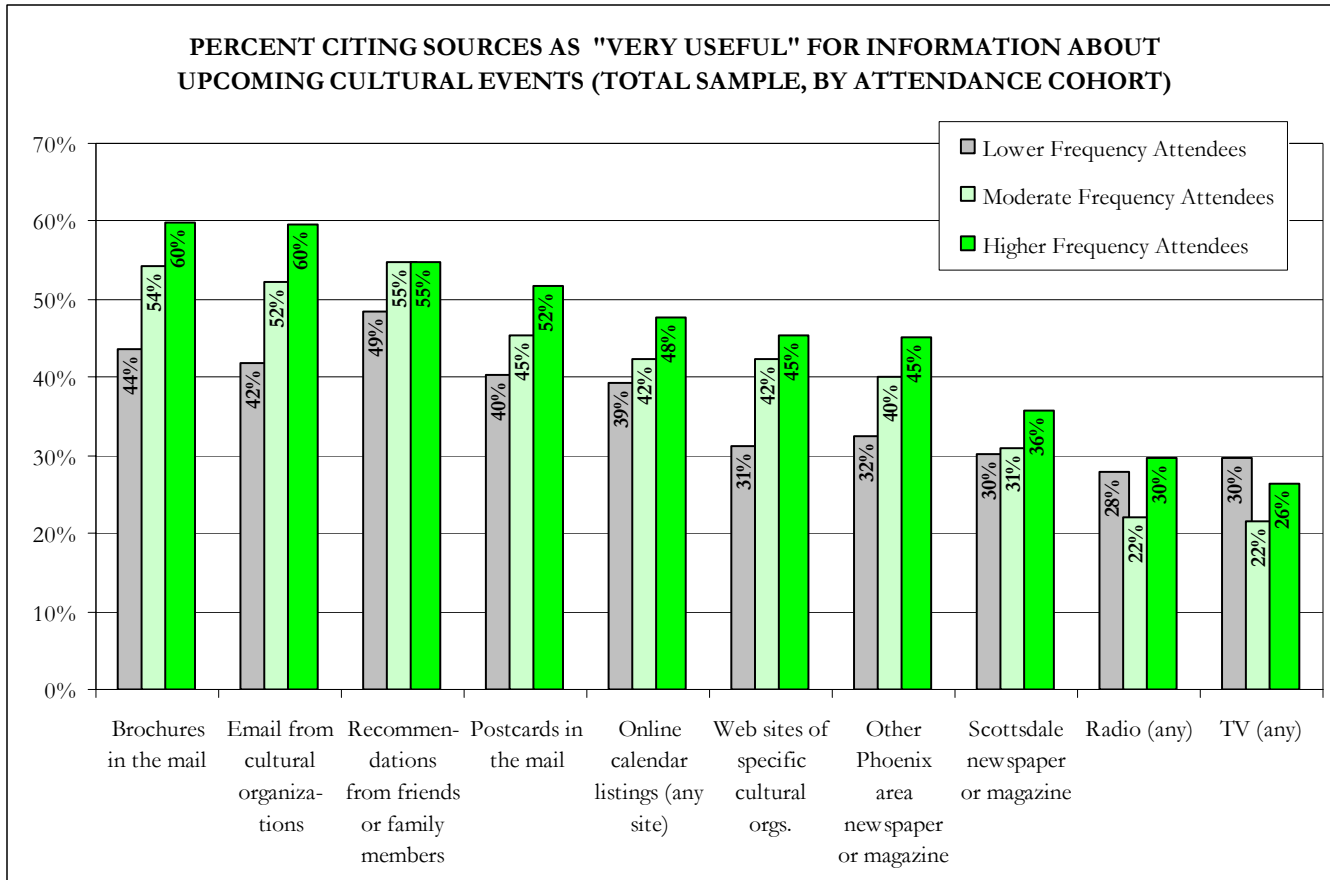
Social Context (continued)



- Other patterns are evident when social context is analyzed by age cohort. While attendance with “my spouse or partner” is relatively consistent across the age cohorts, younger respondents are much more likely than older respondents to attend with “friends,” undoubtedly a function of their marital status (previous page).
 - As would be expected, younger respondents are most likely to attend with “my parents” (a function of age), which might suggest incentives for young adults to bring their parents to arts programs.
- Younger attendees are also somewhat more likely to be comfortable attending alone.
 - What would motivate more young adults to attend alone?
- Predictably, attendance with “my children” is much higher among respondents in the 35-44 and 44-54 age cohorts, indicative of the major shift in cultural consumption that occurs for new parents. Further analysis reveals that presence of children in the household significantly affects social context, with parents of children under 18 year of age being six times as likely as their counterparts to attend with “my children” (71% vs. 13%).
 - Results illustrate how parents sometimes only experience the arts with their children, and suggest careful targeting of cultural offerings for this cohort.



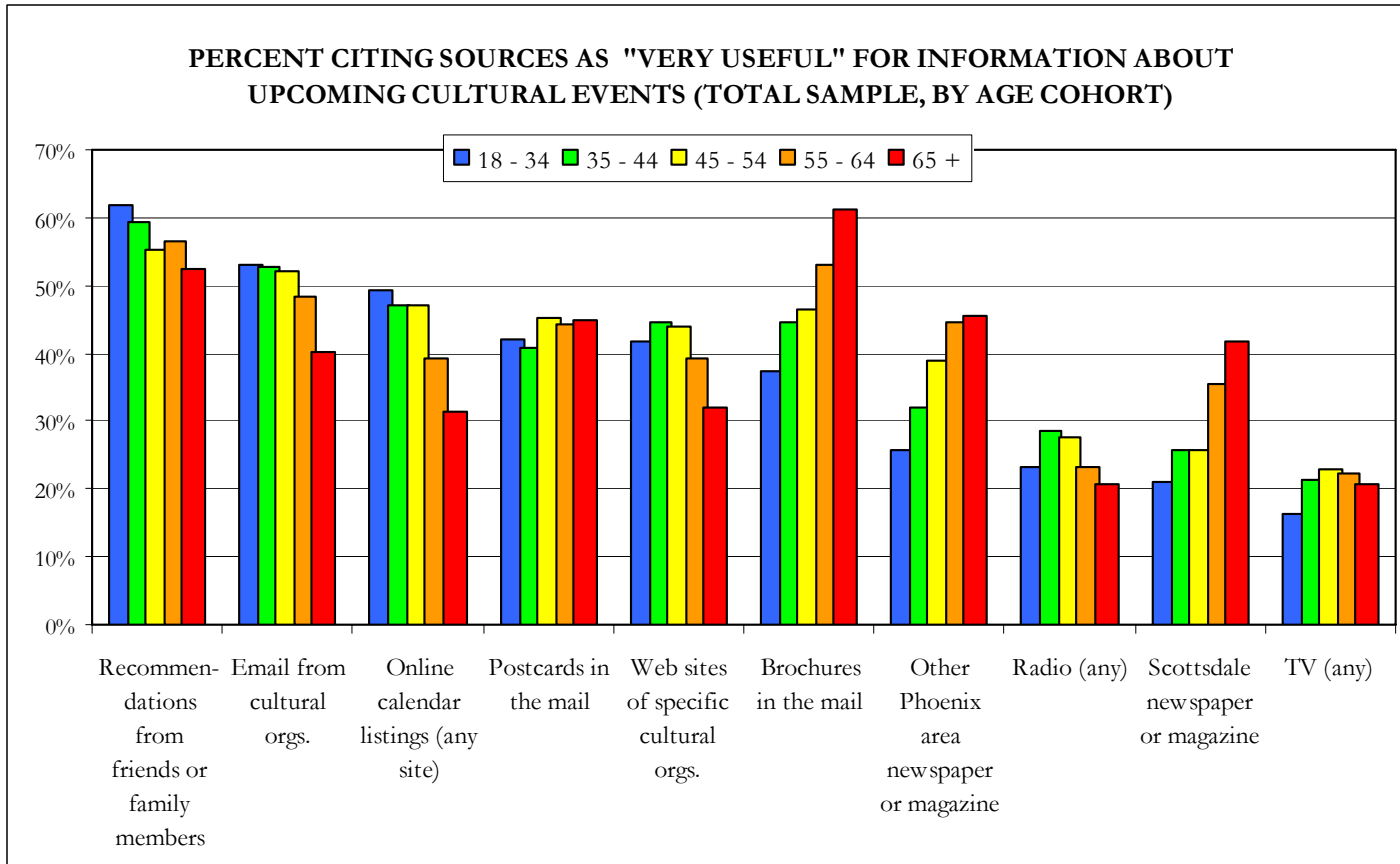
Information Sources



- Respondents were asked “How useful do you find each of the following sources of information about upcoming cultural events?” The percentage of respondents citing each source as “very useful” is reported in the chart at left.
- Overall, “brochures in the mail” and, surprisingly, “e-mail from cultural organizations” are the top sources for the higher-frequency cohort.
- “Recommendations from friends or family members” (i.e., word of mouth) is the most useful source for respondents in the lower-frequency cohort, which is consistent with other research.
- Overall, results illustrate how electronic media (email, websites, etc.) have risen in importance as sources of information about cultural events, and illustrate the importance of maintaining a mix of communication and sales channels for consumers with different media profiles.
- It is interesting to note that “postcards in the mail” was cited as “very useful” at a higher rate than most other sources of information.



Information Sources (continued)



- Generally, respondents in the lowest age cohort are harder to reach: they reported lower levels of usefulness for many information sources.
- The younger cohorts, especially, rely heavily on word of mouth, suggesting the importance of viral marketing techniques and sales incentives that motivate attendance in small social groups.
- Online calendar listings are an important source of information for younger respondents, while newspapers were cited as a “very useful” source of information by many more respondents in the older age cohorts, suggesting fundamentally different modes of information acquisition across the age cohorts.
- Brochures in the mail are the most useful sources of information about arts and cultural activities for respondents in the 65+ age cohort, who are also more likely to use print media.

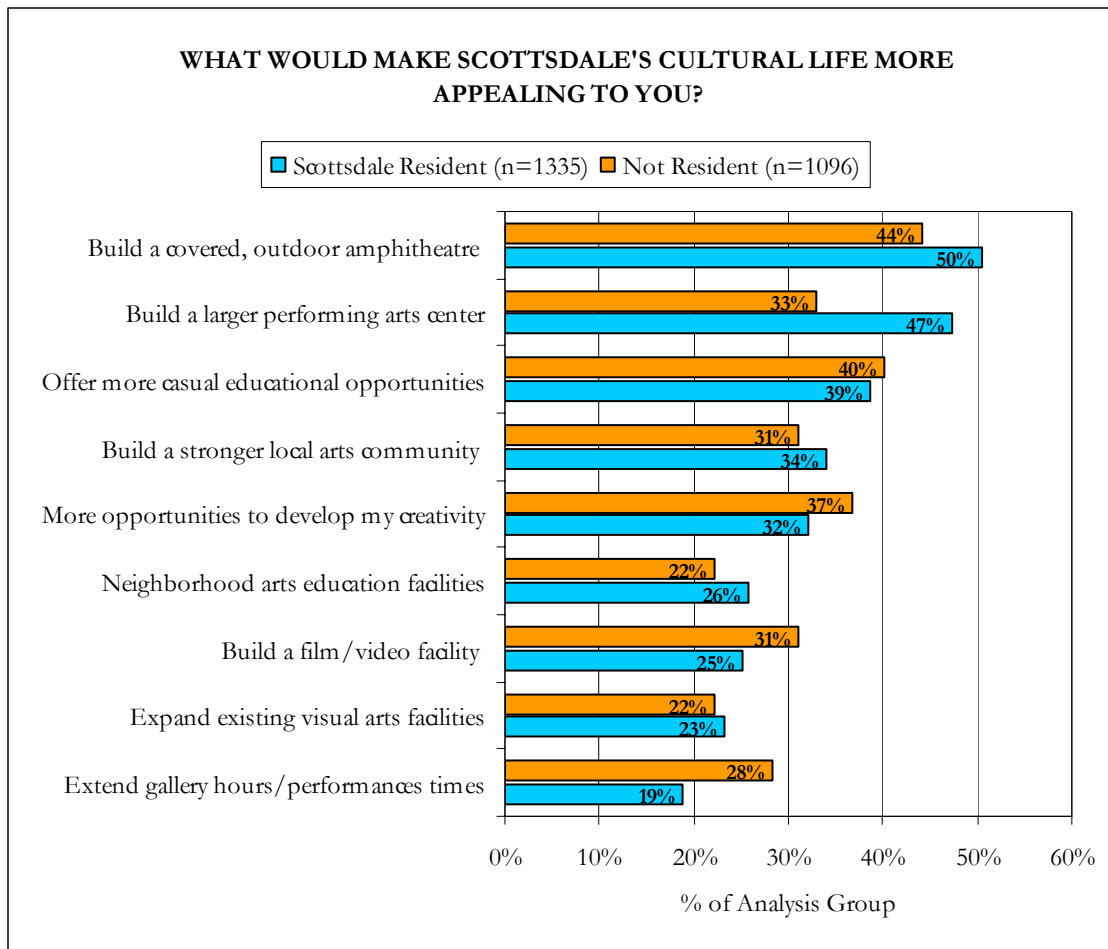




Priorities for the Future



Priorities for Making Scottsdale's Cultural Life "More Appealing"



- Respondents were asked “What would make Scottsdale’s cultural life more appealing to you?” and asked to pick three from a list of nine alternatives. In the chart at left, results are presented for Scottsdale residents vs. non-residents.
- Overall, respondents were most likely to prioritize “Build a covered, outdoor amphitheatre to host music, theatre and dance performances.”
- Some results are significantly different. Most notably, Scottsdale residents were more likely than non-residents to prioritize “Build a larger performing arts center to accommodate more prominent performers” (47% vs. 33%, respectively). In interpreting these results, bear in mind that many respondents were obtained through the SCPA email list.
- Educational opportunities and developing the local arts community were both identified as strong secondary priorities.



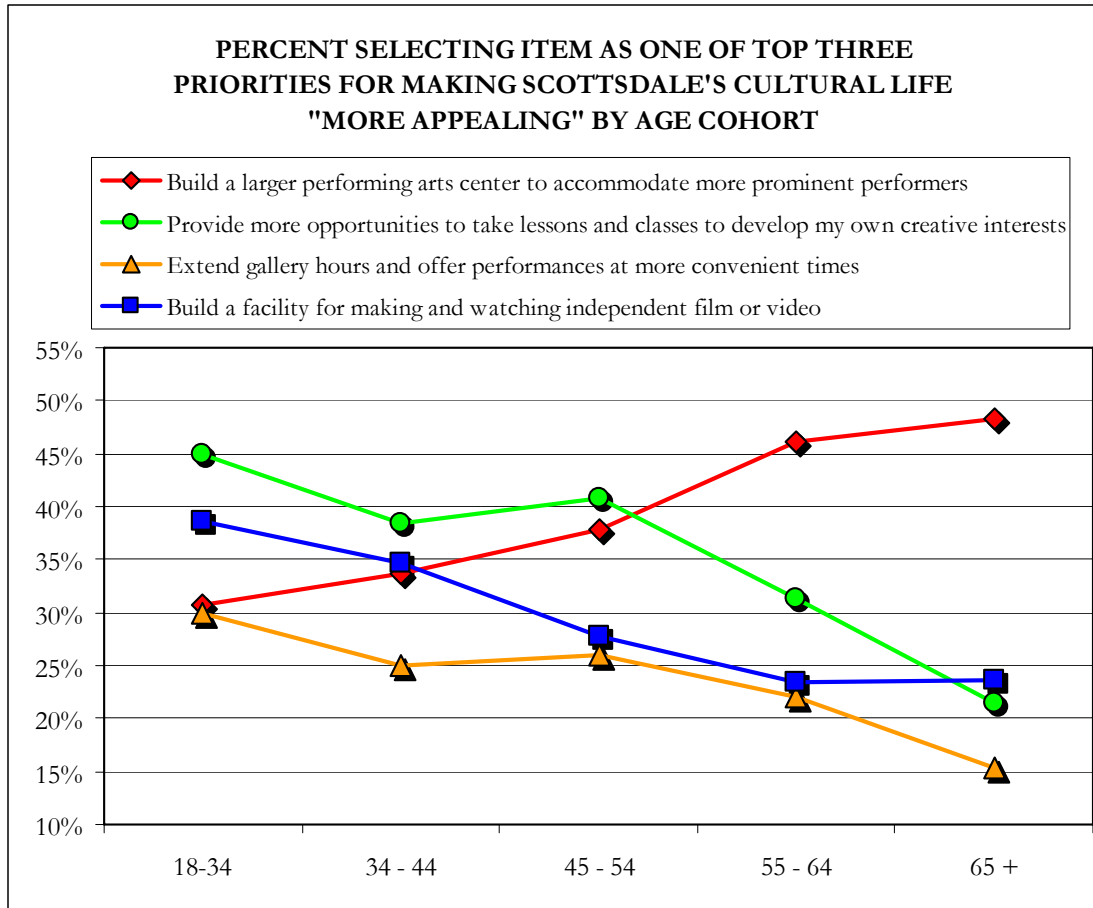
Priorities for Making Scottsdale's Cultural Life "More Appealing" (continued)

PERCENT SELECTING ITEM AS ONE OF TOP THREE PRIORITIES FOR MAKING SCOTTSDALE'S CULTURAL LIFE "MORE APPEALING," BY ATTENDANCE COHORT (WEIGHTED)	Lower Freq. Attendees (n=680)	Moderate Freq. Attendees (n=898)	Higher Freq. Attendees (n=853)
Build a larger performing arts center to accommodate more prominent performers	34%	44%	52%
Offer more casual educational opportunities to learn about art and culture	36%	38%	42%
Build a covered, outdoor amphitheatre to host music, theatre and dance performances	54%	53%	40%
Provide more opportunities to take lessons and classes to develop my own creative interests	39%	31%	36%
Build a stronger local community of Scottsdale-based artists and arts groups	24%	35%	33%
Build a facility for making and watching independent film or video	23%	23%	31%
Expand existing visual arts facilities	13%	18%	29%
Extend gallery hours and offer performances at more convenient times	23%	22%	25%
Make arts education facilities for children and adults available in neighborhoods	27%	25%	22%

- In reference to the three frequency cohorts, some interesting patterns are evident. The top three priorities for the lower- and higher-frequency cohorts are shaded in the table at left.
- Respondents in the lower- and moderate-frequency cohorts were significantly more likely to prioritize the outdoor amphitheatre concept, suggesting a generally broader appeal to the amphitheatre concept, however vaguely it was presented.
- In contrast, respondents in the higher frequency cohort were more likely to prioritize the performing arts center concept.
- Also, respondents in the lower-frequency cohort were relatively more likely to prioritize “opportunities to take lessons and classes to develop my own creative interests” and “arts education facilities for children and adults available in neighborhoods.”



Priorities for Making Scottsdale's Cultural Life "More Appealing" (continued)



- With respect to age, several priorities were substantially more salient for younger respondents, including “Provide more opportunities to take lessons and classes to develop my own creative interests” and “Build a facility for making and watching independent film or video.” Younger respondents were also more likely to prioritize “Extend gallery hours and offer performances at more convenient times.”
- Conversely, the level of priority attached to the performing arts center concept increases significantly with age.
- Overall, results from this question should be taken only as a general indication of the types of facilities and program concepts that different groups of constituents will find more or less appealing. The overall picture is that older respondents and those who are already frequent arts attendees will support the development of traditional arts facilities (both visual and performing arts), while younger and more diverse respondents and those with weaker ties to the arts will prioritize informal facilities and programs with an emphasis on participatory forms of engagement.
 - Results challenge Scottsdale's cultural leaders to consider how different types of programs and facilities are likely to serve different constituents within the community.





Appendix: Survey Protocol



SCC Cultural Assessment

Cultural Census – Online Survey Protocol

Prepared by WolfBrown

Research Goals

The online survey is a vehicle for community input on issues relating to arts and culture in Scottsdale. Eligibility is limited to residents of Scottsdale and the surrounding area. The survey effort is called a “cultural census” to indicate that everyone can (and should) participate. Efforts will be made to gain cooperation from a large cross-section of residents, including those who are not current arts and cultural event attendees. Results will be used to better understand patterns of creative and cultural participation and attitudes about the arts in general. This information will inform the cultural assessment, along with other information gathered by the consultants.

A paper version of the questionnaire will be designed after the online protocol is finalized.

Email Invitation Language

Subject Line: Special Request from the Mayor

Dear Friends,

I encourage you to take a few minutes to participate in the 2007 Scottsdale Cultural Census, a survey about your cultural interests and activities. Your answers will help the city and the Scottsdale Cultural Council to understand what types of cultural programs and facilities should be considered in the future.

Thank you in advance for your cooperation. At the end of the survey, you may enter a drawing to win a \$500 cash prize.

To participate in the survey, go to www.culturalcensus.com.

Mayor Mary Manross
City of Scottsdale

P.S. Please forward this message to your friends and neighbors so that as many people as possible can participate.

Survey Greeting Page

[insert SCC logo in greeting page only– use artwork in Cultural Census directory]

Thanks for participating in the Scottsdale Cultural Census! Any adult (age 18+) living in Scottsdale or greater-Phoenix may complete the survey, which takes approximately 10 to 12 minutes.

Your opinions will be very helpful in shaping the future of the arts and culture in Scottsdale.

Your answers are anonymous and confidential, so please be as candid as possible.

Let's get started...

Respondent Screening Page

1. Are you at least 18 years of age?

Yes

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

2. Have you taken this survey before?

Yes – *You are not eligible to take the survey again. Please cancel out of the survey by closing your browser window.*

No – Click Submit to continue

If you have difficulty advancing past this question, you may need to set your web browser to enable cookies. [Click Here](http://zoomerang.custhelp.com/cgi-bin/zoomerang.cfg/php/enduser/std_adp.php?p_faqid=86&p_sid=jTj2_zli&p_lva=309&p_sp=cF9zcmNoPTEmcF9zb3J0X2J5PSZwX2dyaWRzb3J0PSZwX3Jvd19jbnQ9NCZwX3Byb2RzPSZwX2NhdHM9JnBfcHY9JnBfY3Y9JnBfc2VhemNoX3R5cGU9YW5zd2Vycy5zZWZwY2hfbmwmcF9wYWdlPTEmcF9zZWZwY2hfdGV4dD1jb29raWVz&p_li=cF91c2VyaWQ9YWxhbkbBhbGFuc2Jyb3duLmNvbSZwX3Bhc3N3ZD0mcF9lbWFpbD1hbGFuQGFsYW5zYnJvd24uY29tJnBfZmlyc3RfbmFtZT1hbGFuJnBfbGFzdF9uYW11PWJyb3duJnBfY2NmXzE9MSZwX2NjZl82PTEmcF9jY2ZfNT0mcF9jY2ZfMz0yMyZwX2NjZl8yMz0xMDQwNzE4OCZwX2NjZl8yND0xMTg3NjI4MjQwJnBfY2NmXzI5PTEwNTYwOTIyNDAmcF9jY2ZfMjU9dXMmcF9jY2ZfMjY9Y3QmcF9jY2ZfMzA9MTA1ODg5MjI0MCZwX2NjZl8yNz05NSZwX2NjZl8yOD0yMDMtMjU5LTcyMTk%3D#) for more information.

Online Survey Page 1: Respondent Background

3. What is your home ZIP code? (e.g., the primary residence where you spend most of the year)

[open-ended comments box – there are too many ZIPs to include a drop-down list; we’ll have to edit the verbatims]

4. Are you a Scottsdale or Phoenix-area resident for: <i>(select one from the drop-down list)</i>

- The full year
- 9 to 11 months per year
- 6 to 8 months per year
- Less than 6 months per year

5. How long have you lived in the Scottsdale or greater-Phoenix area? <i>(select one from the drop-down list)</i>

- A year or less
- 1 to 2 years
- 3 to 5 years
- 6 to 10 years
- 11 to 20 years
- More than 20 years

6. Do you earn a portion of your income from performing or creating art?

Yes/No

7. Did you vote in the last election, wherever you lived?

Yes/No

You have completed Part 1 of 9. Click Submit to continue.

Online Survey Page 2: Cultural Consumption

Please tell us a little about your creative and cultural activities.

8. In your own words, tell us what creative and cultural activities are most important to you.
[Comments Box]

9. Approximately how often do you attend art museums or galleries, on an annual basis?

- Never
- 1 or 2 times a year
- 3 to 5 times a year
- 6 to 10 times a year
- More than 10 times a year

10. Approximately how often do you attend <u>ticketed</u> live performing arts programs, on an annual basis?

- Never
- 1 or 2 times a year
- 3 to 5 times a year
- 6 to 10 times a year
- More than 10 times a year

11. Typically, who is with you when you go to cultural programs? <i>(select all that apply)</i>

- My spouse or partner
- My children
- My parents
- Extended family
- Friends
- Visitors
- Co-workers
- Alone

12. Which of the following are places where you <u>regularly</u> do creative and cultural activities? <i>(select all that apply)</i>

Response Items

- Your home
- Places of worship
- Community centers and recreation centers
- University or community college facilities
- Public or private school facilities
- Bars and clubs
- Libraries and bookstores
- Theaters and concert halls
- Art museums
- Natural history and historic museums
- Commercial art galleries
- Outdoor facilities and parks

13. How often do you see or experience any of Scottsdale's public art installations?

- Never
- Occasionally
- Often

You have completed Part 2 of 9. Click Submit to continue.

Online Survey Page 3: Use of Phoenix Area Venues

The Scottsdale Center for the Performing Arts and the Scottsdale Museum of Contemporary Art are located in downtown Scottsdale on the Scottsdale Civic Mall.

14. Indicate how often you have visited at each of the following museums in the <u>past year</u>.

Response Choices:

- None
- 1 or 2 times
- 3 or more times

Scottsdale Museum of Contemporary Art
Phoenix Museum of Art
Heard Museum
Galleries at the Mesa Arts Center
ASU Art Museum
West Valley Art Museum

15. Indicate how often you have attended performances at each of the following performing arts facilities in the <u>past year</u>.

Response Choices:

- None
- 1 or 2 times
- 3 or more times

Scottsdale Center for the Performing Arts
Scottsdale Desert Stages Theatre
Stagebrush Theatre in Scottsdale
ASU Kerr Cultural Center in Scottsdale
Pinnacle Presbyterian Church in North Scottsdale
Symphony Hall in downtown Phoenix
The Orpheum Theater in downtown Phoenix
Herberger Theatre Center in downtown Phoenix
Dodge Theatre in downtown Phoenix
Celebrity Theater, near Sky Harbor Airport
Gammage Auditorium at ASU
Mesa Arts Center
Chandler Center for the Arts

You have completed Part 3 of 9. Click Submit to continue.

Online Survey Page 4: Satisfaction with Scottsdale Facilities

[insert image of SCPA – use artwork in Cultural Census directory]

16. Which of the following are <u>major reasons</u> why you don't attend performances at the Scottsdale Center for the Performing Arts more often? <i>(select all that apply)</i>

Response Items

- Not aware of what's going on
- Not interested in what's offered
- Family obligations keep me close to home
- Too busy/not enough time to fit it in

Too expensive, tickets cost too much
No one to go with
Distance is too far, drive time too long
Cost or availability of parking
Safety concerns
Performance times aren't convenient

17. Are there any other specific reasons why you do not attend performances at the Scottsdale Center for the Performing Arts more often? [open-ended comments box]

[insert image of SMOCA – use artwork in Cultural Census directory]

178 Which of the following are <u>major reasons</u> why you don't visit the Scottsdale Museum of Contemporary Art more often? <i>(select all that apply)</i>

Response Items

Not aware of what's going on
Not interested in what's offered
Family obligations keep me close to home
Too busy/not enough time to fit it in
Too expensive, tickets cost too much
No one to go with
Distance is too far, drive time too long
Cost or availability of parking
Safety concerns
Hours aren't convenient

19. Are there any other specific reasons why you do not visit the Scottsdale Museum of Contemporary Art more often? [open-ended comments box]

You have completed Part 4 of 9. Click Submit to continue.

Online Survey Page 5 – Arts Interests

Please tell us about your interests in different creative activities. For each activity, choose one of the following five answers:

Not interested

Haven't, but would like to try

Used to, but don't any longer

Enjoy it occasionally

A vital activity for me

20. How active are you in the following literary activities? <i>(select one answer for each line)</i>

Read books for fun
Meet with a book club or reading group
Story-telling
Write in a journal, diary or blog

Write poetry, lyrics or rap
Write original stories
Do writing for work or study

21. How active are you in the following theatre activities? <i>(select one answer for each line)</i>

Act (perform for other people) or volunteer in a community theatre
Attend live stage plays
Attend live musical theatre
Attend dinner theatre

22. How active are you in the following dance activities? <i>(select one answer for each line)</i>

Take dance lessons or classes (any style)
Learn dances from friends or family members
Social dancing at night clubs or parties
Go to community ethnic or folk dances
See praise dancing in a church
Attend performances by dance companies

23. What types of dance performances, if any, are you most interested in attending? <i>(select all that apply)</i>

Ballet
Modern dance
Jazz or tap dance
Hip hop dance
Folk or ethnic dance of diverse cultures
Dance performances by children
Other

You have completed Part 5 of 9. Click Submit to continue.

Online Survey Page 6: Arts Interests, Continued

24. How active are you in the following music activities? <i>(select one answer for each line)</i>

Compose or arrange music
Take music lessons (any instrument)
Sing in a choir
Play music with family
Play music in a group such as a band or orchestra
Download music from the Internet
Attend live concerts

25. What types of music concerts, if any, are you most interested in attending? <i>(select all that apply)</i>

Jazz or blues concerts
Concerts of folk or ethnic music that celebrate your own heritage

Concerts of folk or ethnic music of diverse cultures
Rap or Hip hop concerts
Other popular music concerts (rock, pop, country, etc.)
Classical music concerts
Opera performances
Music performances by children
Other

26. What musical instruments do you or your family members play? [COMMENTS BOX]

27. How active are you in the following visual arts, crafts and design activities? <i>(select one answer for each line)</i>

Take visual art or craft-making classes
Learn crafts from friends or family members
Make visual art (any medium)
Make crafts of any kind
Read books or watch programs about art and architecture
Collect art or decorations for your home
Take architectural home tours
Attend talks about art, architecture and design
Participate in Scottsdale's gallery scene
Visit art museums and galleries outside of Scottsdale

28. How active are you in these other creative or cultural activities? <i>(select one answer for each line)</i>

Watch art films or foreign films in theatres or on DVD
Watch arts programs on cable or network television
Take photographs
Make videos
Design, embroider or sew clothing
Gardening or landscaping
Preparing traditional foods
Do arts and cultural activities with your children or grandchildren
Do cultural activities while traveling

29. Are there any other creativity activities that are important to you, that have not been mentioned? [Comments Box]

You have completed Part 6 of 9. Click Submit to continue.

Survey Protocol – Online Page 7 – Priorities for Cultural Investment

30. What would make Scottsdale's cultural life more appealing to you? Read the following list, and then choose your <u>three</u> top priorities. <i>(choose only three items)</i>

[randomize list]

Build a larger performing arts center to accommodate more prominent performers
Expand existing visual arts facilities

- Build a covered, outdoor amphitheatre to host music, theatre and dance performances
- Make arts education facilities for children and adults available in neighborhoods
- Provide more opportunities to take lessons and classes to develop my own creative interests
- Build a stronger local community of Scottsdale-based artists and arts groups
- Extend gallery hours and offer performances at more convenient times
- Offer more casual educational opportunities to learn about art and culture
- Build a facility for making and watching independent film or video

31. If you would like to share any other ideas for what would make Scottsdale’s cultural life more enjoyable, please let us know. [comments box]

You have completed Part 7 of 9. Click Submit to continue.

Survey Protocol – Online Page 8 – Sources of Information

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

Scale (1-5)

1= Not Useful

7 = Very Useful

- Recommendations from friends or family members
- Brochures in the mail (received months in advance)
- Postcards in the mail (closer to the event date)
- Scottsdale newspaper or magazine
- Other Phoenix area newspaper or magazine
- Radio (any)
- Television (any)
- Web sites of specific cultural organizations
- Online calendar listings (any site)
- Email from cultural organizations

You have completed Part 8 of 9. Click Submit to continue.

Survey Protocol – Online Page 9 – Demographics

To finish, please tell us a little about yourself. This information is confidential.

A. Your gender?

Female / Male

B. Your age? <i>(select one from the drop-down list)</i>

- 18-24
- 25-34
- 35-44
- 45-54
- 55-64

65-74
75+

C. Are there any children under age 18 living in your home?

Yes/No

D. Your marital status? <i>(select one from the drop-down list)</i>

Married or partnered
Single/never married
Previously married or partnered

E. Which of the following best describes your race/ethnicity? <i>(select one from the drop-down list)</i>

African American
Asian American
Hispanic/Latino
White, not Hispanic
Native American
Mixed Race or Other

F. What is the last level of school you completed? <i>(select one from the drop-down list)</i>

Some High School
Completed High School
Some College or Associates Degree
Bachelors Degree
Graduate Study
Professional degree (Dr., JD, MBA)

G. Your annual household income? <i>(select one from the drop-down list)</i>

Under \$25,000
\$25,000 to \$34,999
\$35,000 to \$49,999
\$50,000 to \$74,999
\$75,000 to \$99,999
\$100,000 to \$149,999
\$150,000 or more

Click Submit to finish the survey.

[Survey Protocol – Drawing Entry Page](#)

Thanks so much for your assistance with the Scottsdale Cultural Census.

One final invitation. As part of the Scottsdale Cultural Assessment, focus group discussions will be held on Friday, June 8 and Saturday, June 9 in Scottsdale. The discussions will last 90 minutes, and each participant will receive \$50 in cash.

May we contact you about the possibility of participating in one of the discussion groups?

Yes/No

If “Yes,” indicate which of the following times that you might be available. <i>(select all that apply)</i>

Friday, June 8 from 5:30 to 7:00 p.m.

Friday, June 8 from 7:30 to 9:00 p.m.

Saturday, June 9 from 1:00 to 2:30 p.m.

Saturday, June 9 from 3:00 to 4:30 p.m.

Would you like to be entered in a drawing to win a \$500 cash prize?

Yes/No

If you responded affirmatively to either of the previous questions, please give us your name, e-mail address and daytime telephone so that we may follow-up with you. <i>This information will not be used for any other purpose.</i>

Name: [One line comments box]

Email address (or telephone): [One line comments box]

Daytime phone: [One line comments box]

Click “Submit” to exit the survey.

Closing Page

Thank you for taking the Scottsdale Cultural Census.

For more information about the Cultural Assessment, visit the Scottsdale Cultural Center web site at www.scottsdalearts.org.