



Cultural Participation Study For Maricopa County: Community-Wide Survey Of Attitudes And Trends

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Methodology

- Telephone interviews with adults 21+
- Random digit dial sample
- 800 completes
- Let cultural attenders/non-attenders fall out
- Non-attenders = not been to a cultural event in the last year AND chose a 4-7 on interest in attending in the next year, where 1 is “not at all interested” and 7 is “extremely interested”



Objectives

- Objective 1: Assess Attitudes About Cultural Events In Maricopa County
- Objective 2: Determine Cultural Attendance Patterns
- Objective 3: Determine Reasons For Attending Cultural Events
- Objective 4: Identify Obstacles To Attending Cultural Events
- Objective 5: Identify Sources Of Cultural Event Information
- Objective 6: Measure Awareness Of And Attendance At Specific Cultural Institutions

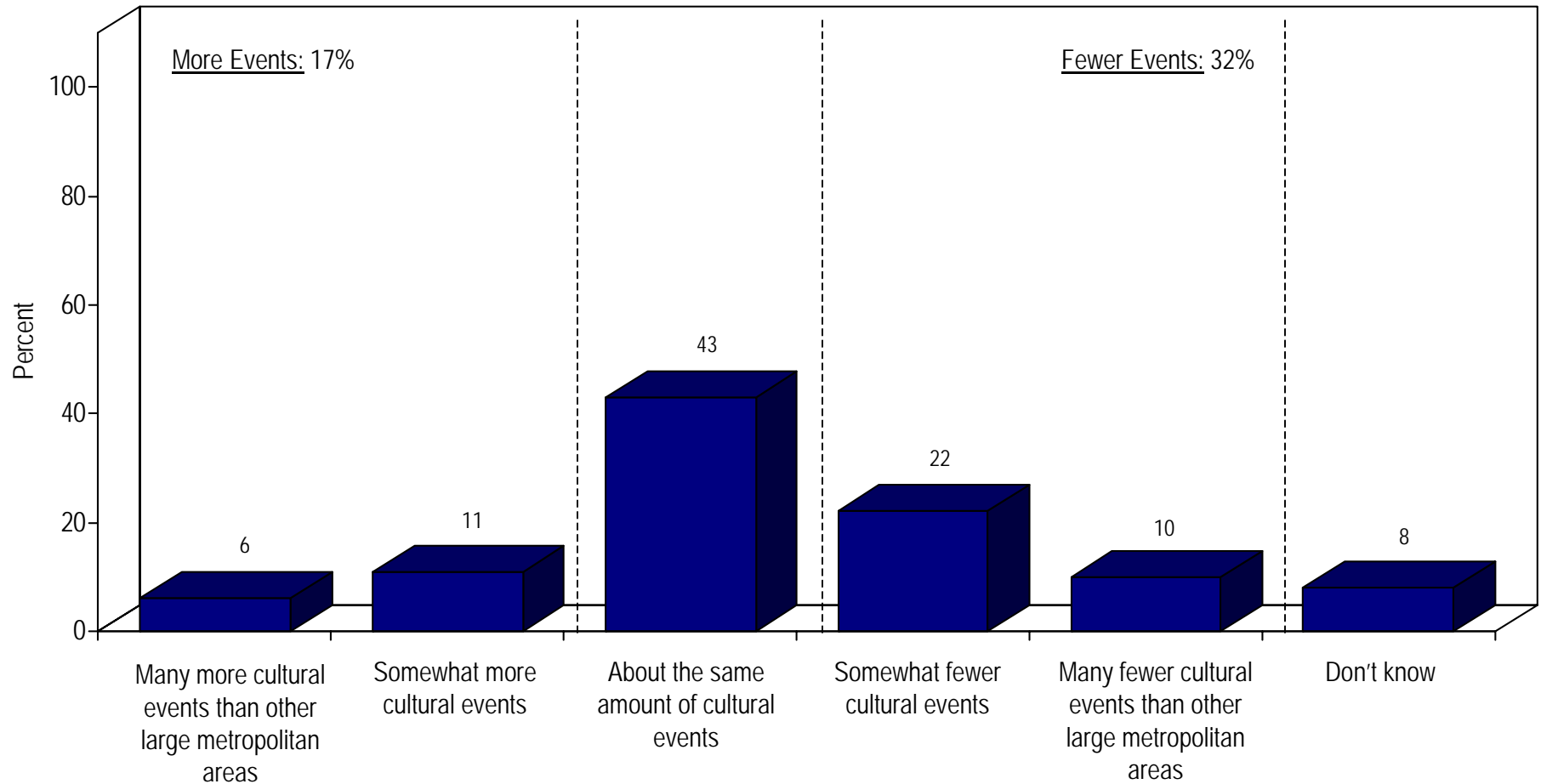
Objective 1: Assess Attitudes About Cultural Events In Maricopa County





Figure 1:

Perceived Availability Of Cultural Events In Maricopa County



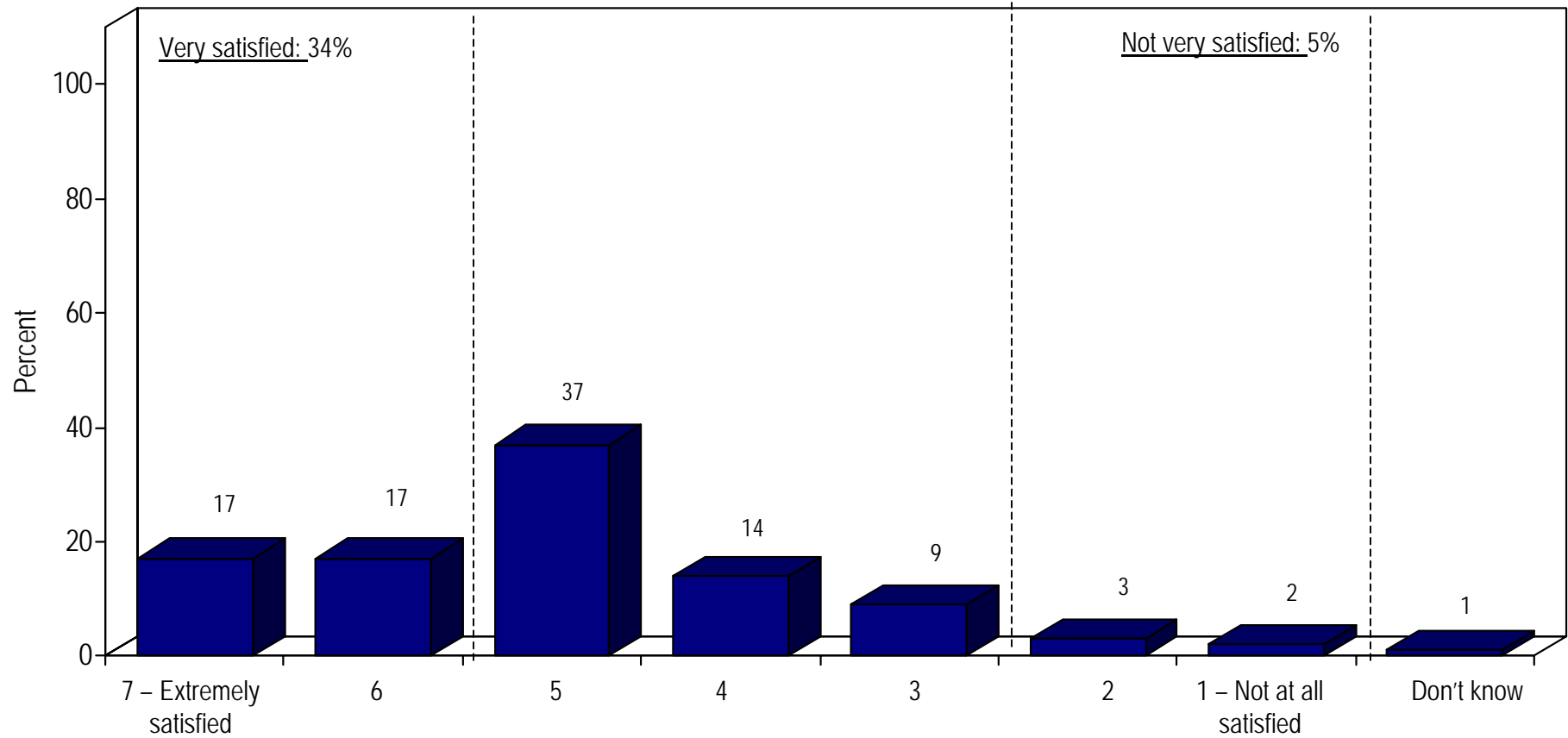
Base: Total respondents (N=800)

Q 1a: For the rest of the survey, I am going to use the words "cultural activities" to refer to attendance at museums, concerts, opera, dance, theater and other performing arts events. Thinking about the availability of cultural events, would you say Maricopa County has:



Figure 2:

Overall Satisfaction With Cultural Events In Maricopa County



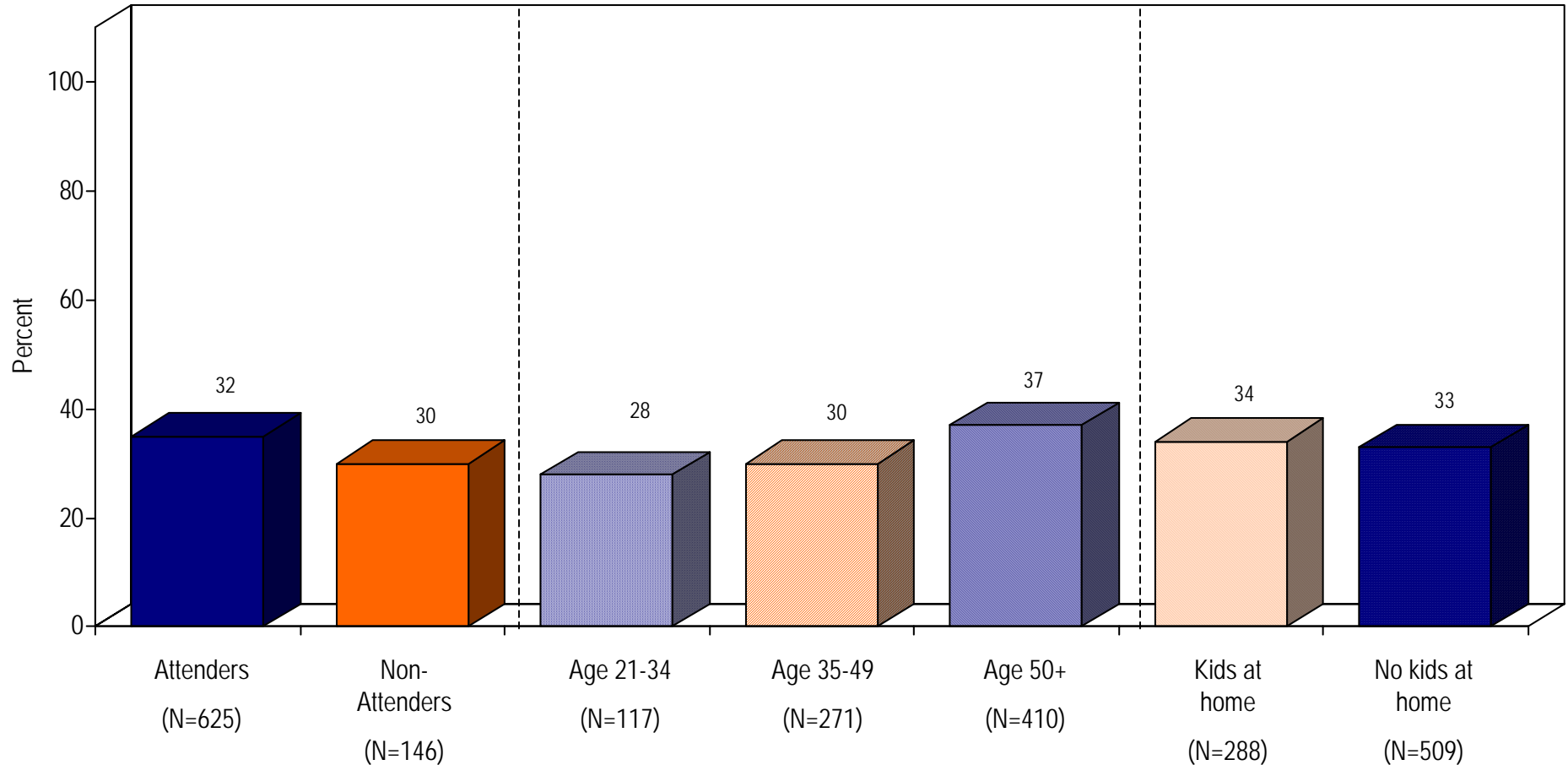
Base: Total respondents (N=800)

Q 1b: Please evaluate your overall satisfaction with the cultural events available in Maricopa County.



Figure 3:

Overall Satisfaction With Cultural Events In Maricopa County



Base: Total respondents (N=800)

Q 1b: Please evaluate your overall satisfaction with the cultural events in Maricopa County.

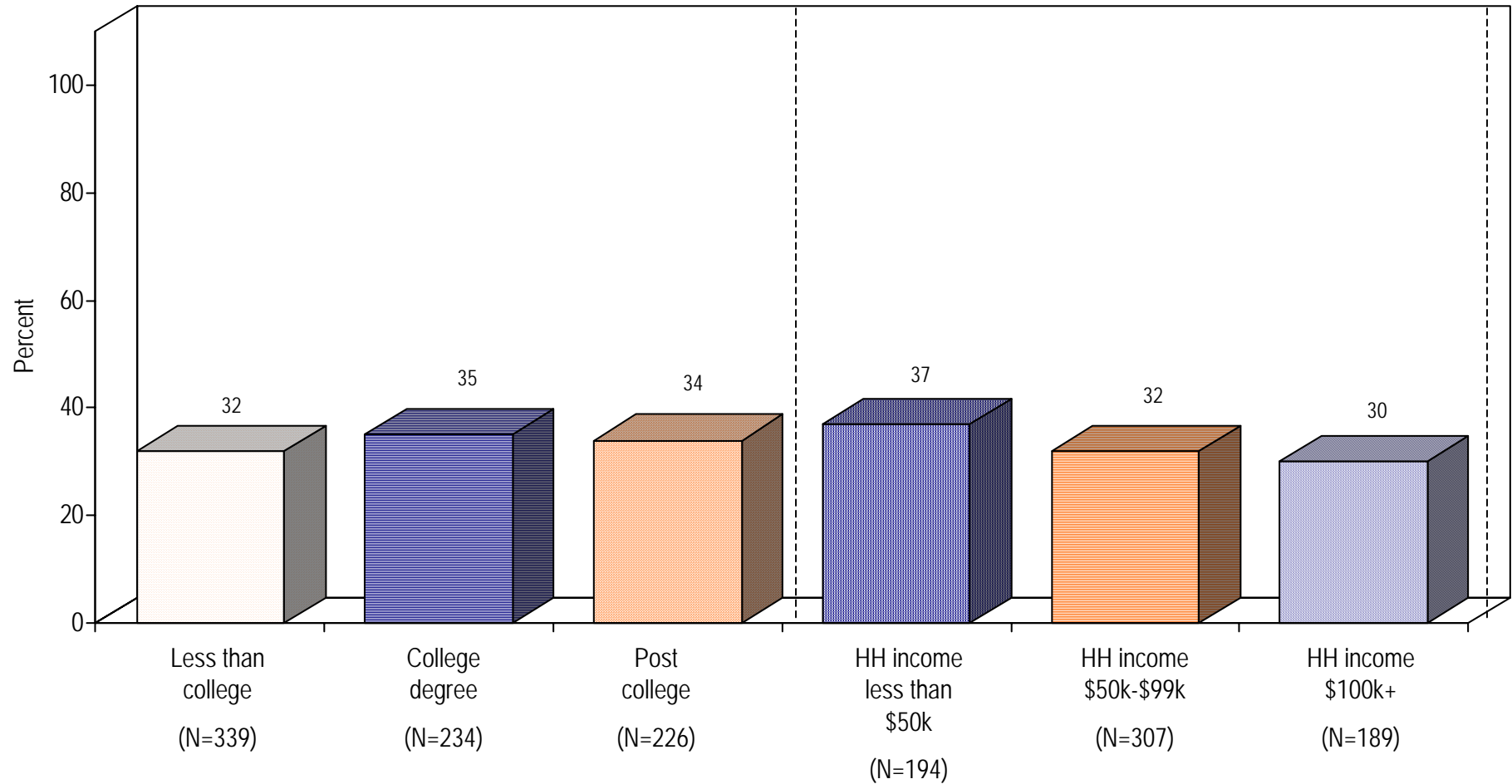
Note: Percentages represent those who answered "6" or "7" on a 7 point scale where 1 is "Not at all satisfied," and 7 is "Extremely satisfied"

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Figure 3:

Overall Satisfaction With Cultural Events In Maricopa County (Cont'd)



Base: Total respondents (N=800)

Q 1b: Please evaluate your overall satisfaction with the cultural events in Maricopa County.

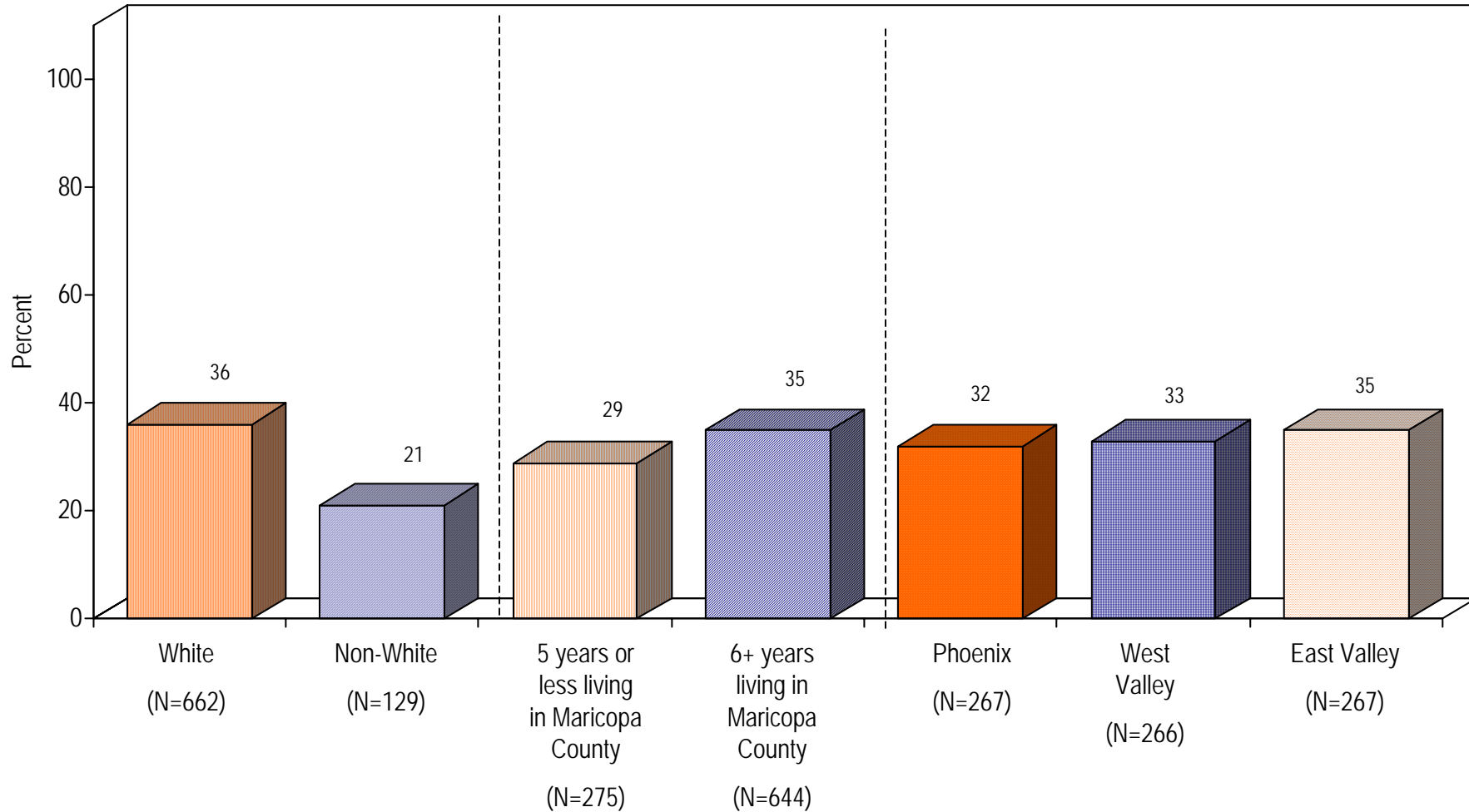
Note: Percentages represent those who answered "6" or "7" on a 7 point scale where 1 is "Not at all satisfied," and 7 is "Extremely satisfied"

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Figure 3:

Overall Satisfaction With Cultural Events In Maricopa County (Cont'd)



Base: Total respondents (N=800)

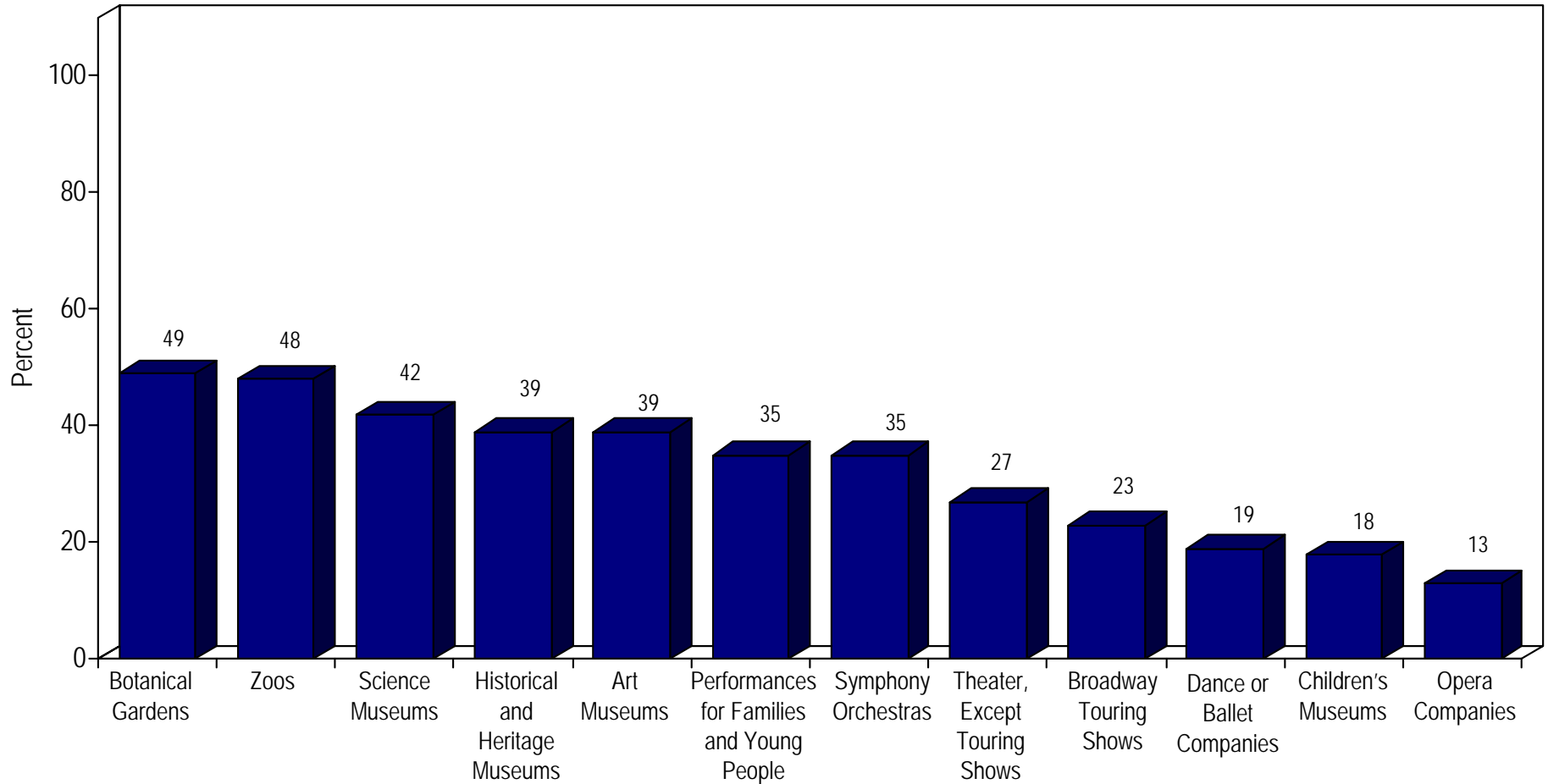
Q 1b: Please evaluate your overall satisfaction with the cultural events in Maricopa County.

Note: Percentages represent those who answered "6" or "7" on a 7 point scale where 1 is "Not at all satisfied," and 7 is "Extremely satisfied"



Figure 4:

Perceived Quality Of Different Types Of Cultural Organizations In Maricopa County



Base: Total respondents (N=800)

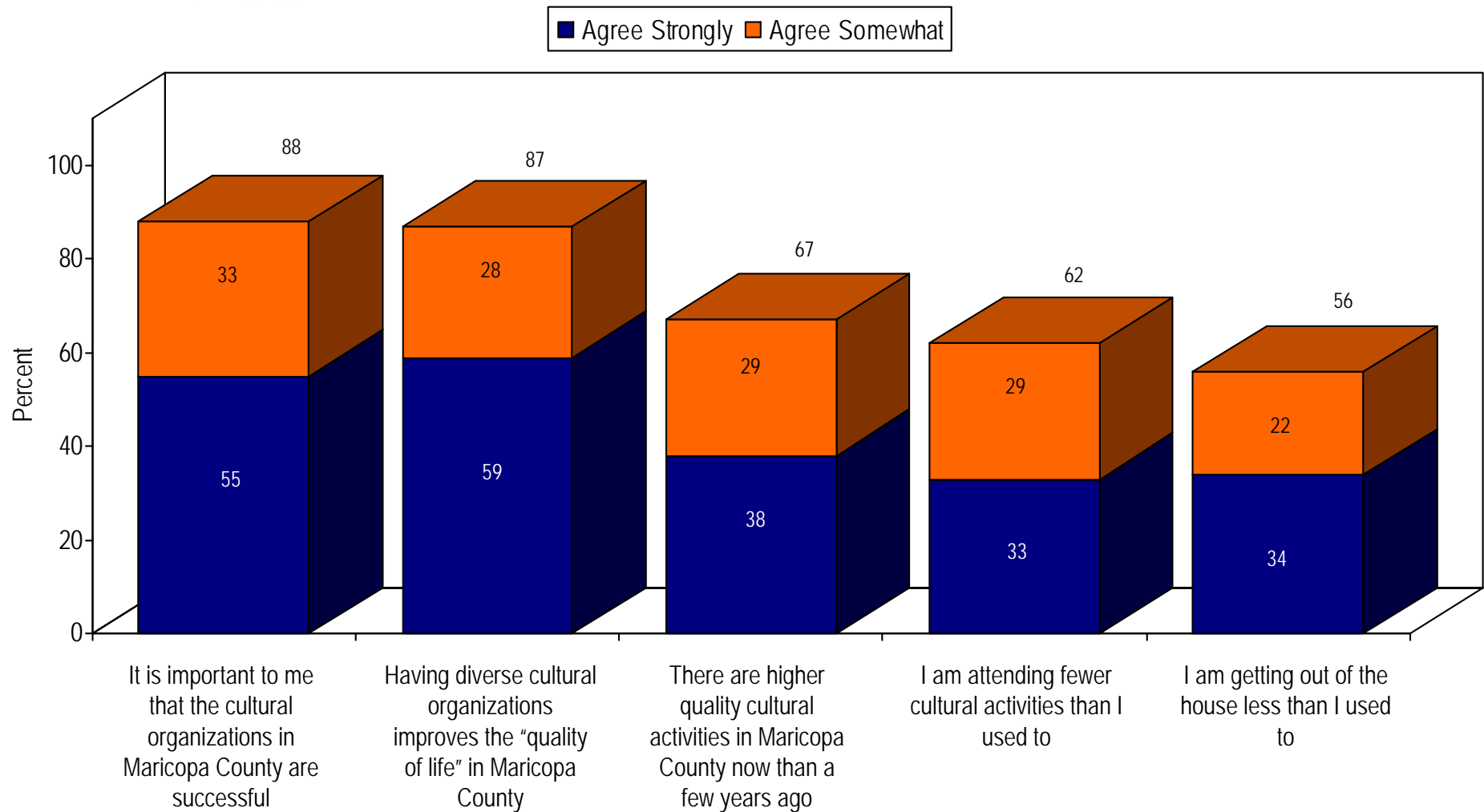
Q 1c: How do you feel about the quality of the following types of cultural organizations in Maricopa County?

Note: Percentages shown represent those answering a "6" or a "7" on a 7-point scale, where 7 is "Excellent" and 1 is "Poor."



Figure 5:

Attitudes About Cultural Events In Maricopa County



Base: Total respondents (N=800)

Q 9: For each of the following statements, do you agree strongly, agree somewhat, disagree somewhat, or disagree strongly?

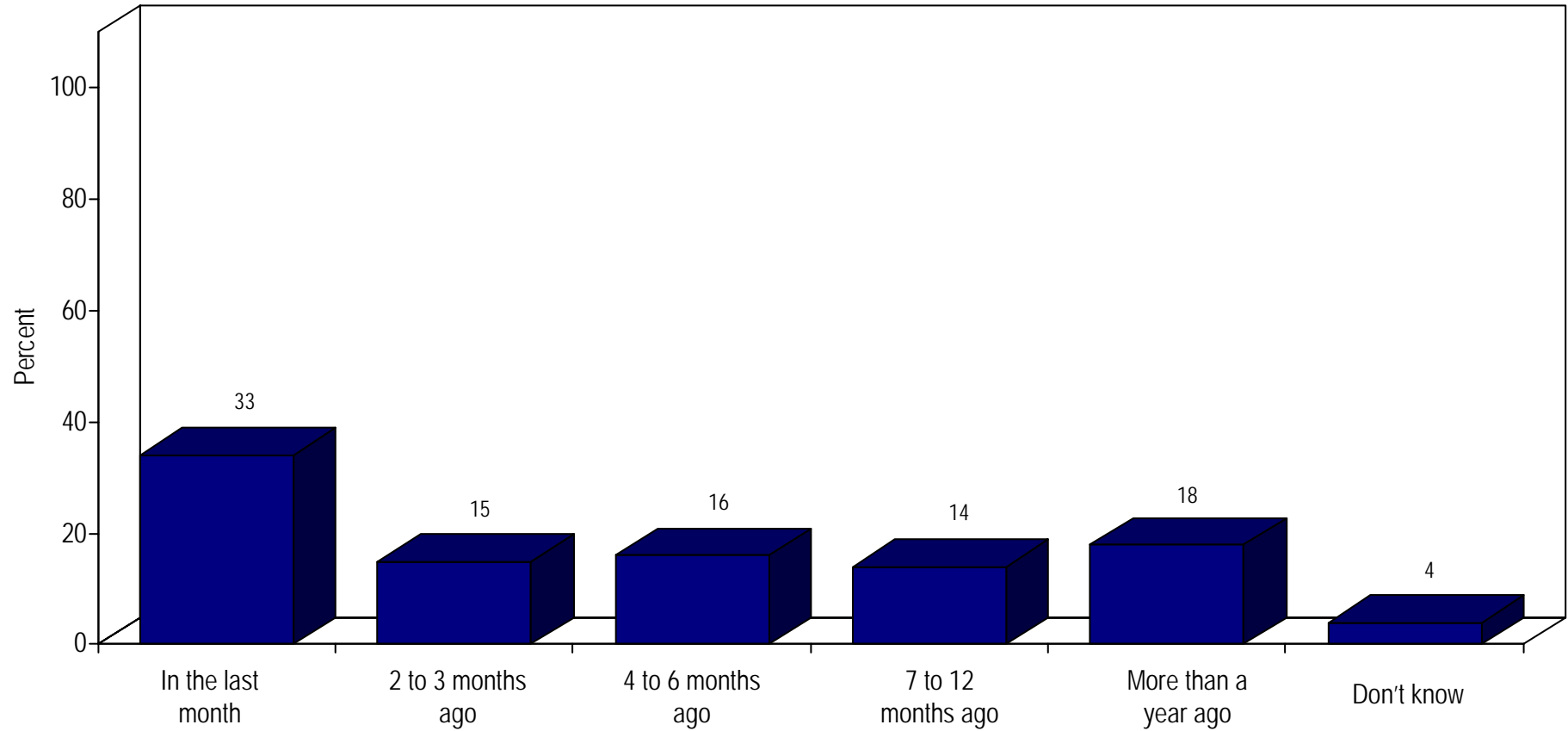
Objective 2: Determine Cultural Attendance Patterns





Figure 6:

When Last Attended Cultural Event In Maricopa County



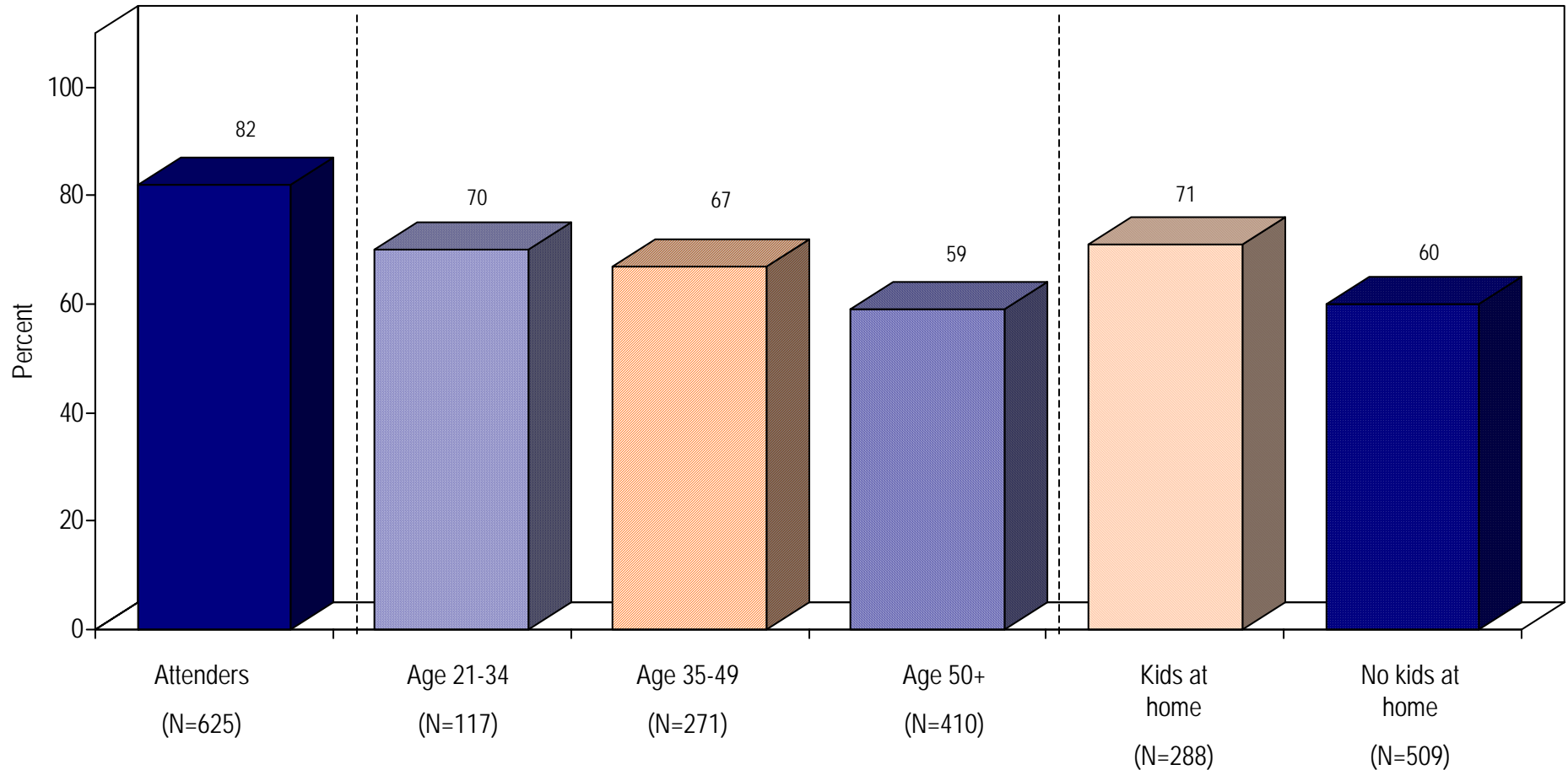
Base: Total respondents (N=800)

Q A: When was the last time you went to a museum, including a zoo, a botanical garden, or a science center, a concert, the opera, dance, the theater or any other similar cultural, arts or entertainment event somewhere in Maricopa County?



Figure 8:

Attended Cultural Event In Past 6 Months In Maricopa County



Base: Total respondents (N=800)

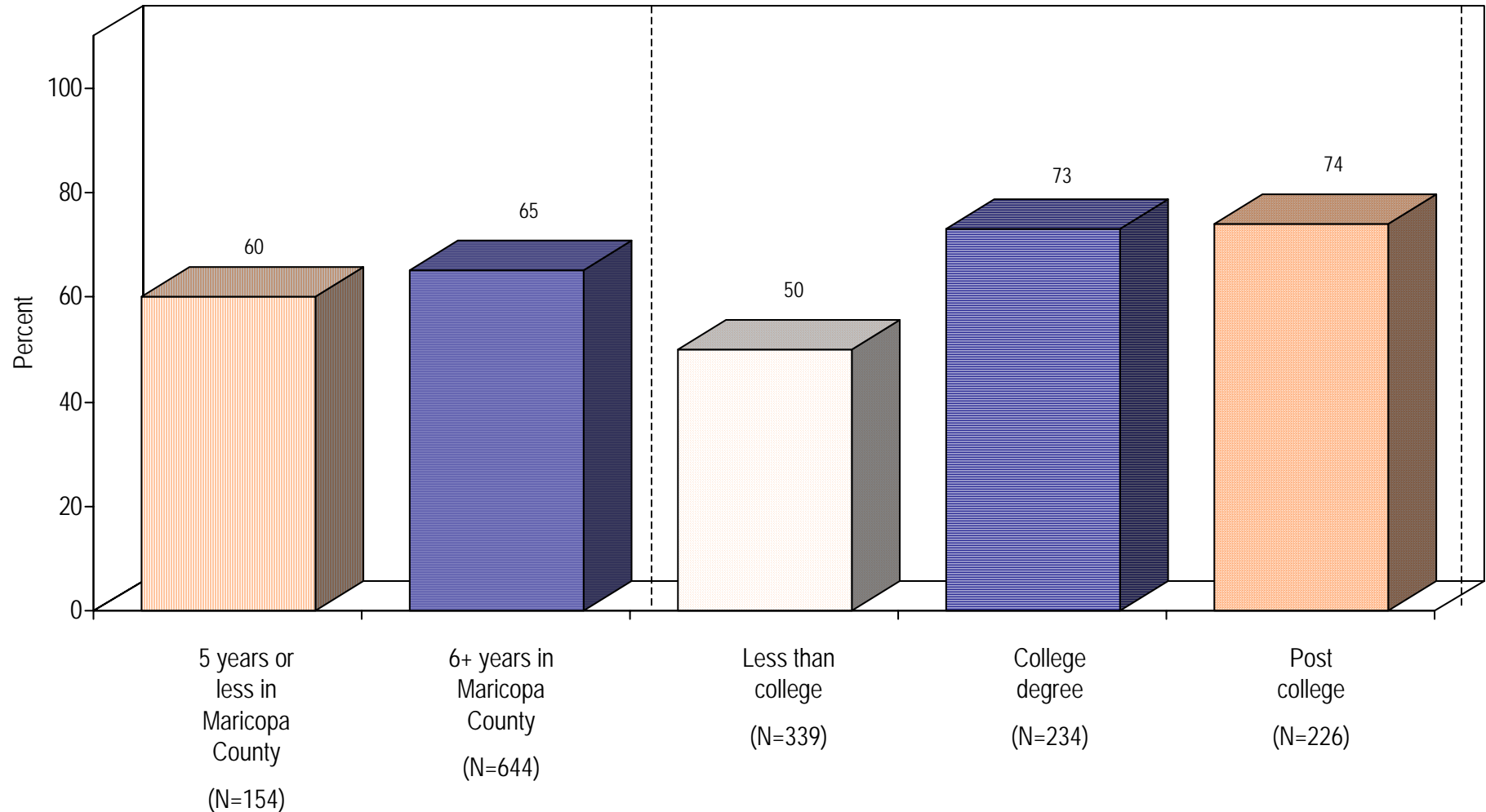
Q A: When was the last time you attended a museum, including a zoo, a botanical garden, or a science center, a concert, the opera, dance, the theater or any other similar cultural, arts or entertainment event somewhere in Maricopa County?

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Figure 8:

Attended Cultural Event In Past 6 Months In Maricopa County (Cont'd)



Base: Total respondents (N=800)

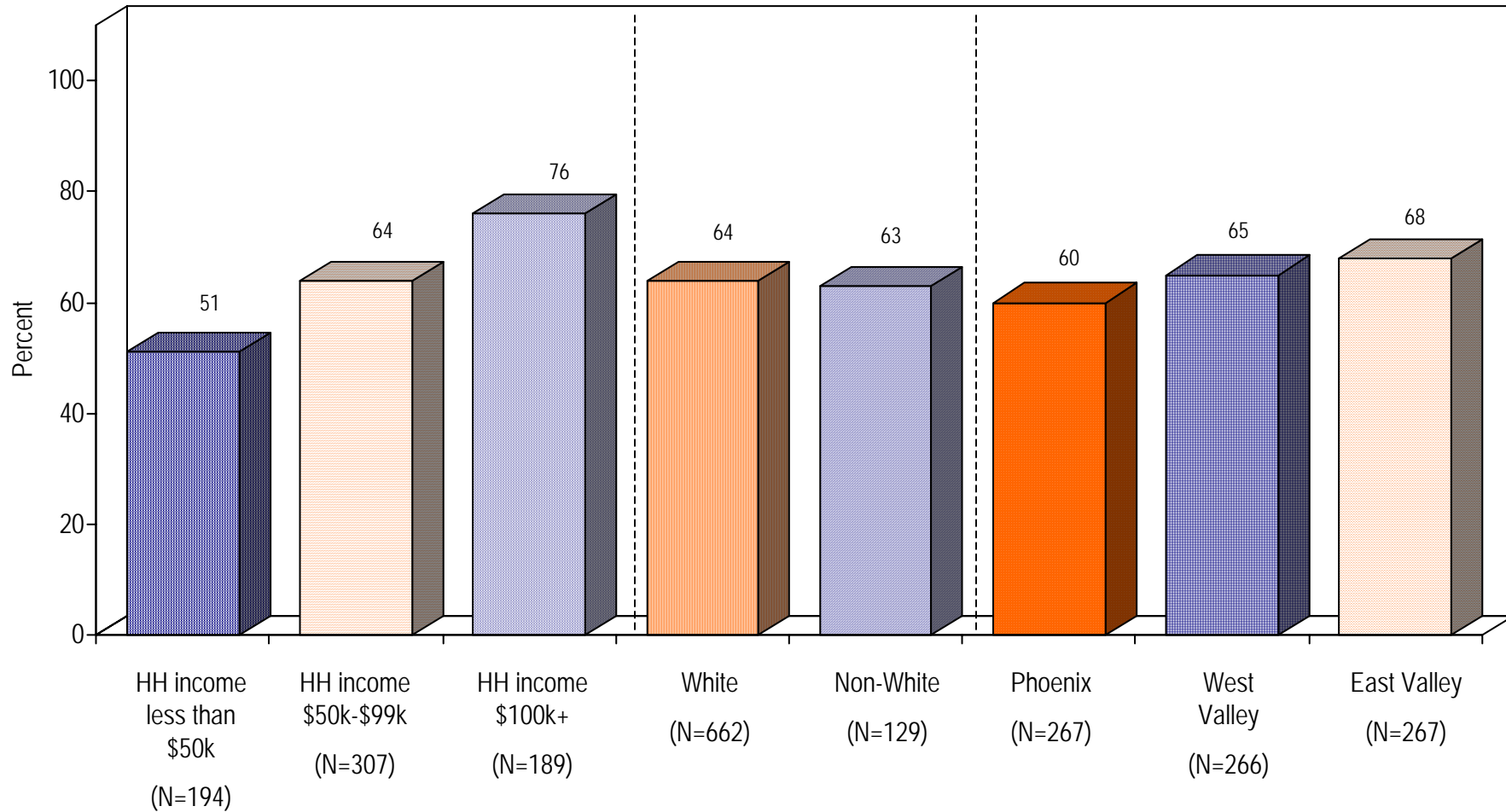
Q A: When was the last time you attended a museum, including a zoo, a botanical garden, or a science center, a concert, the opera, dance, the theater or any other similar cultural, arts or entertainment event somewhere in Maricopa County?

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Figure 8:

Attended Cultural Event In Past 6 Months In Maricopa County (Cont'd)

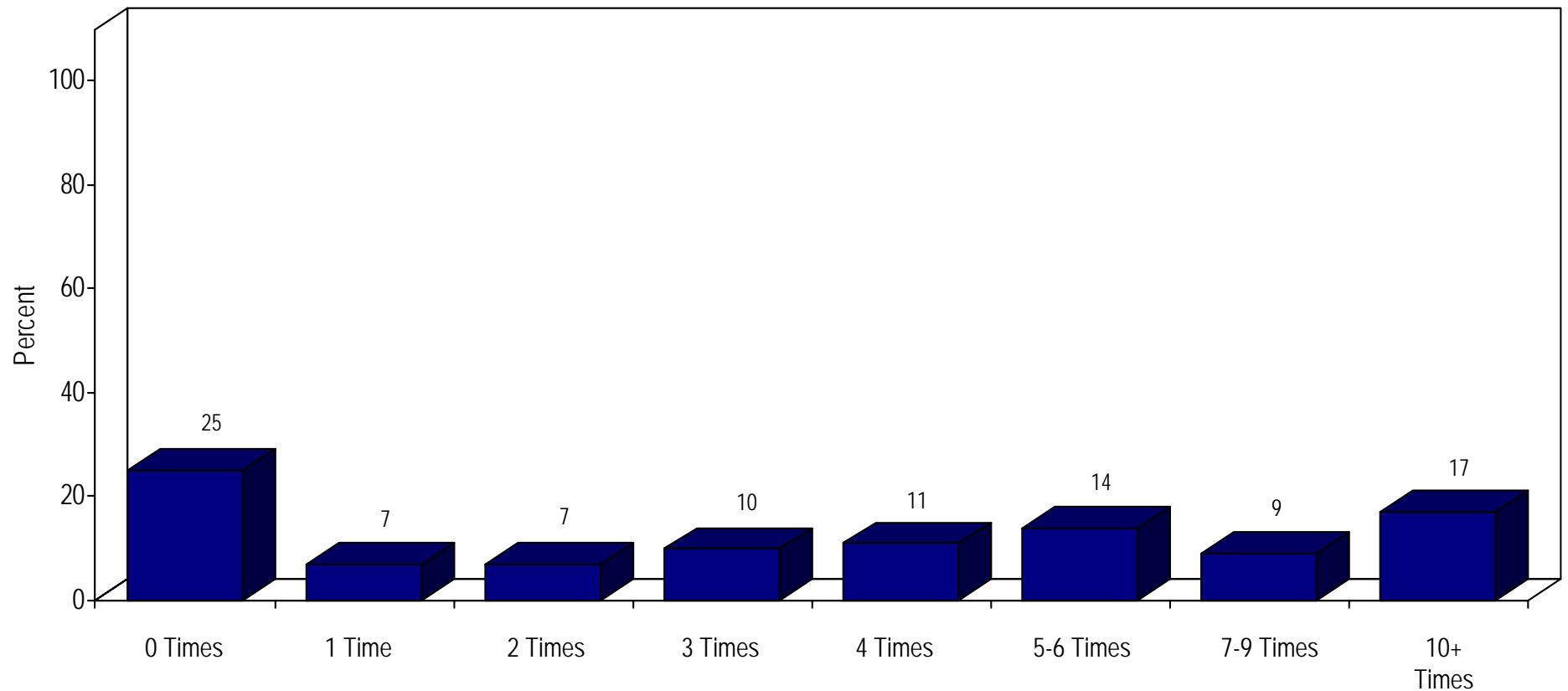


Base: Total respondents (N=800)

Q A: When was the last time you attended a museum, including a zoo, a botanical garden, or a science center, a concert, the opera, dance, the theater or any other similar cultural, arts or entertainment event somewhere in Maricopa County?



Figure 7: Times Attended Any Cultural Arts Event Anywhere In The Last Year (All Respondents)



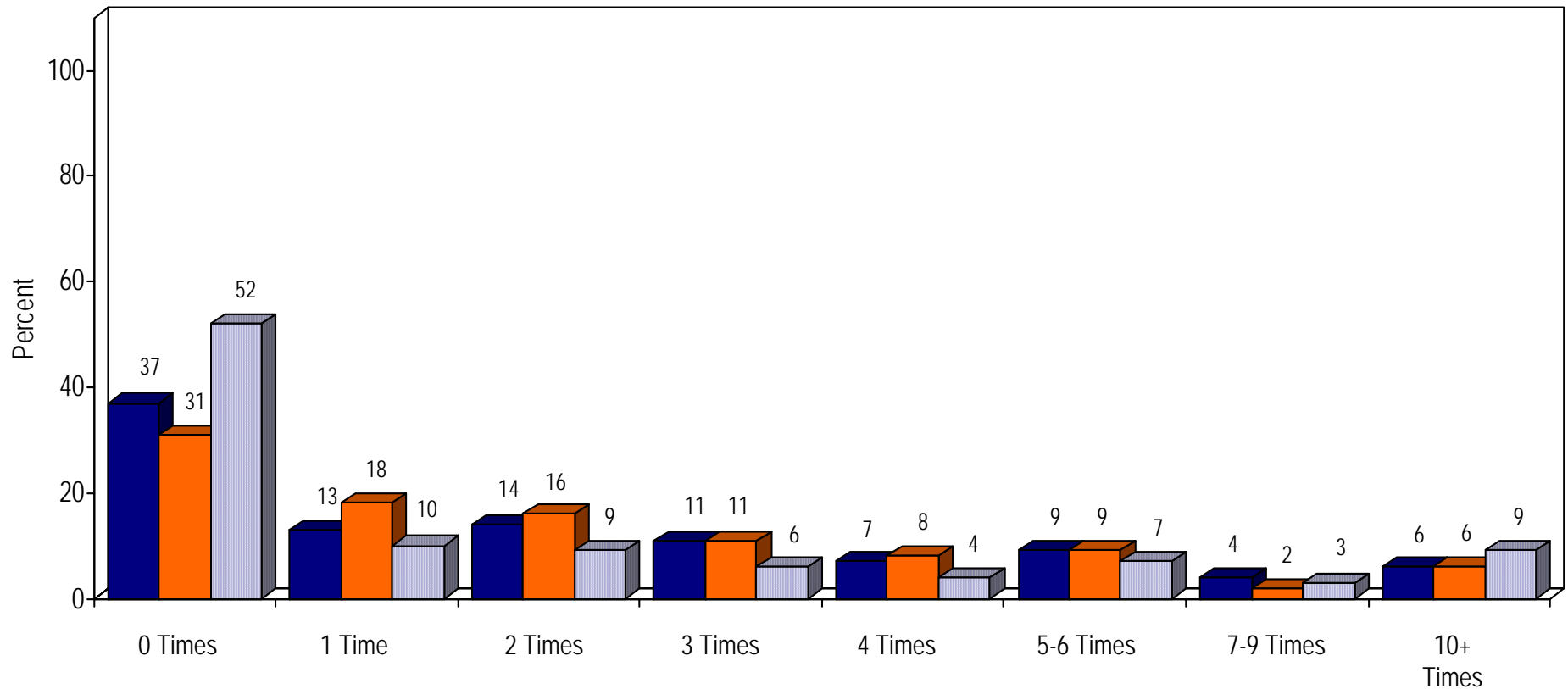
Base: Total Respondents (N=800)
Q 3a: In the last year, how many times did you attend:



Figure 16:

Times Attended Different Types Of Cultural Events Anywhere In Last Year (All Respondents)

■ Performing Arts ■ Museum, Zoo, Botanical Garden ■ Professional Sports

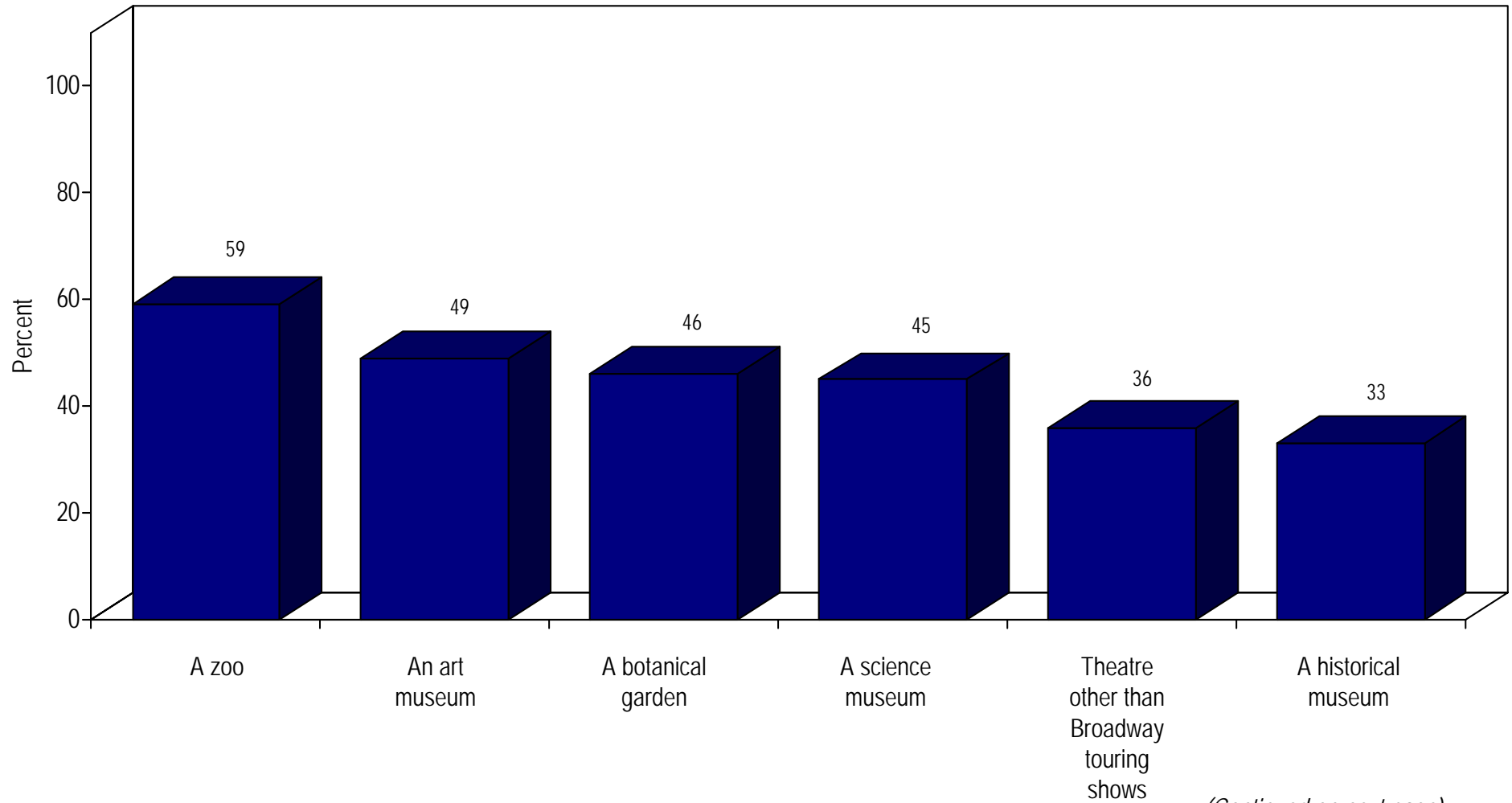


Base: Total Respondents (N=800)

Q 3a: In the last year, how many times did you attend:



Figure 17: Cultural Events Attended Anywhere In Last Year



Base: Total respondents (N=800)

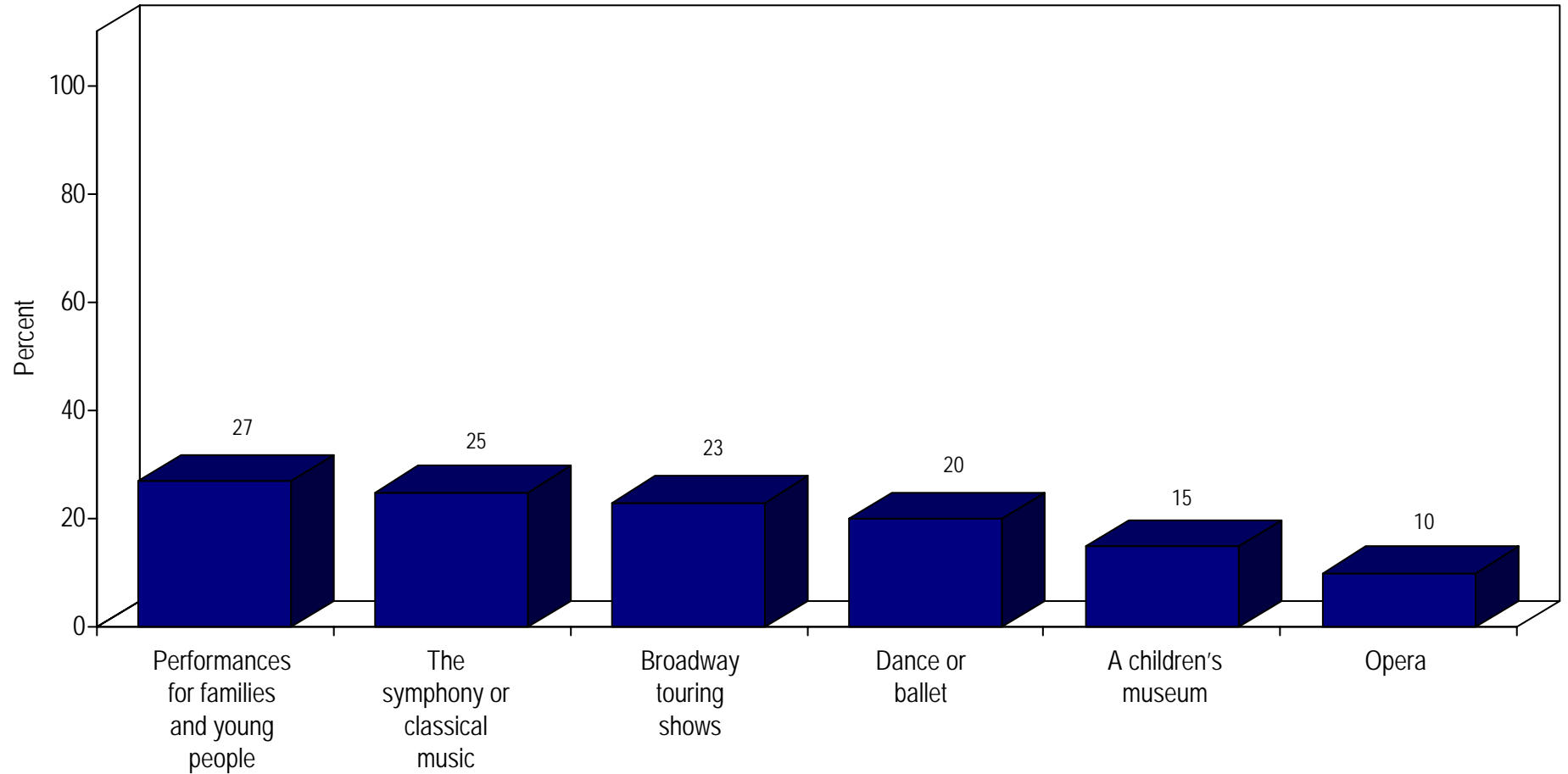
Q 3b: In the last year, did you attend each of the following types of cultural events? Do not include children's school performances.

Note: Percentages represent those who answered "Yes."

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Figure 17: Cultural Events Attended In Last Year (Cont'd)



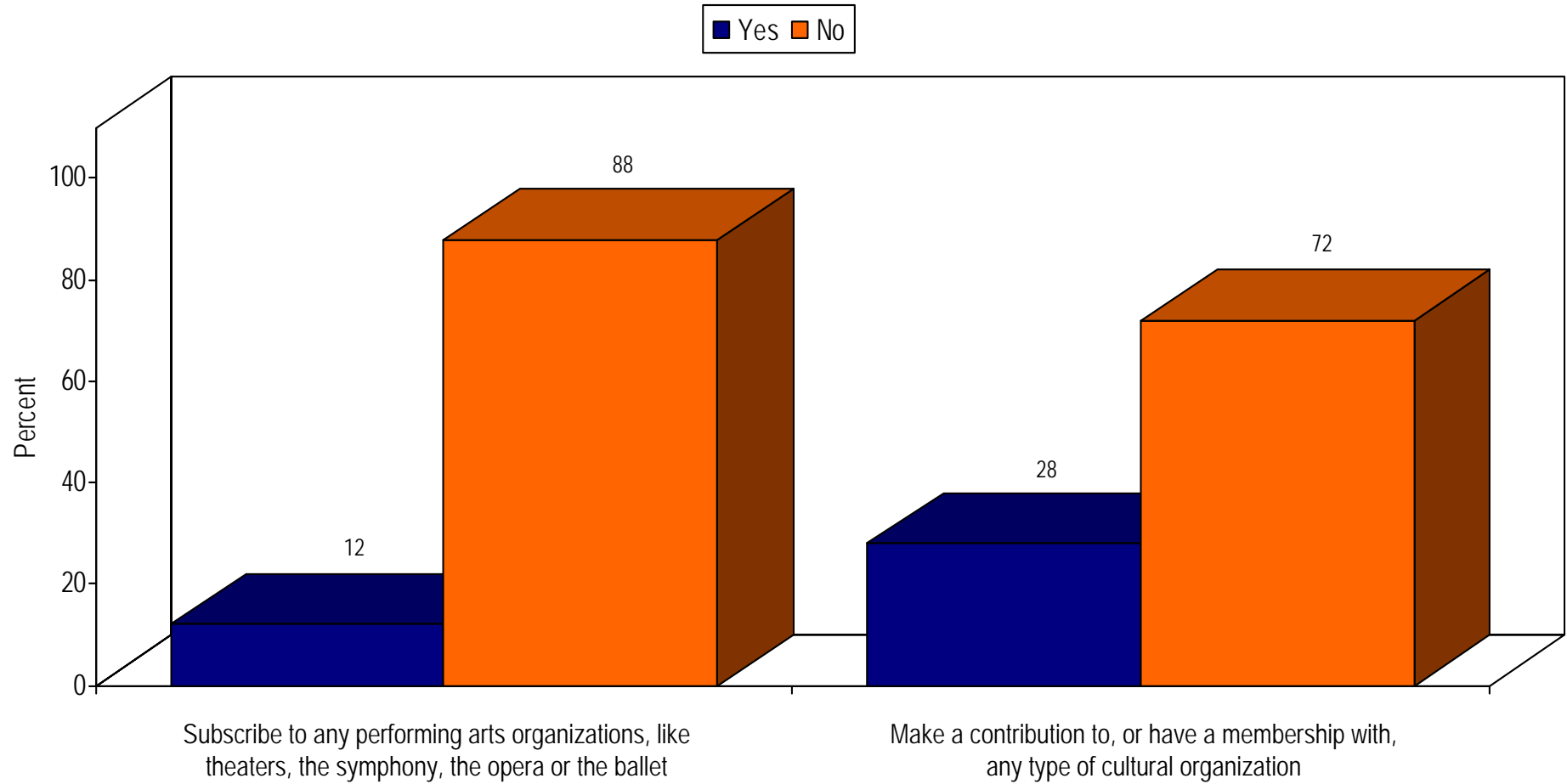
Base: Total respondents (N=800)

Q 3b: In the last year, did you attend each of the following types of cultural events? Do not include children's school performances.

Note: Percentages represent those who answered "Yes."



Figure 18: Subscribe Or Donate



Base: Total respondents (N=800)

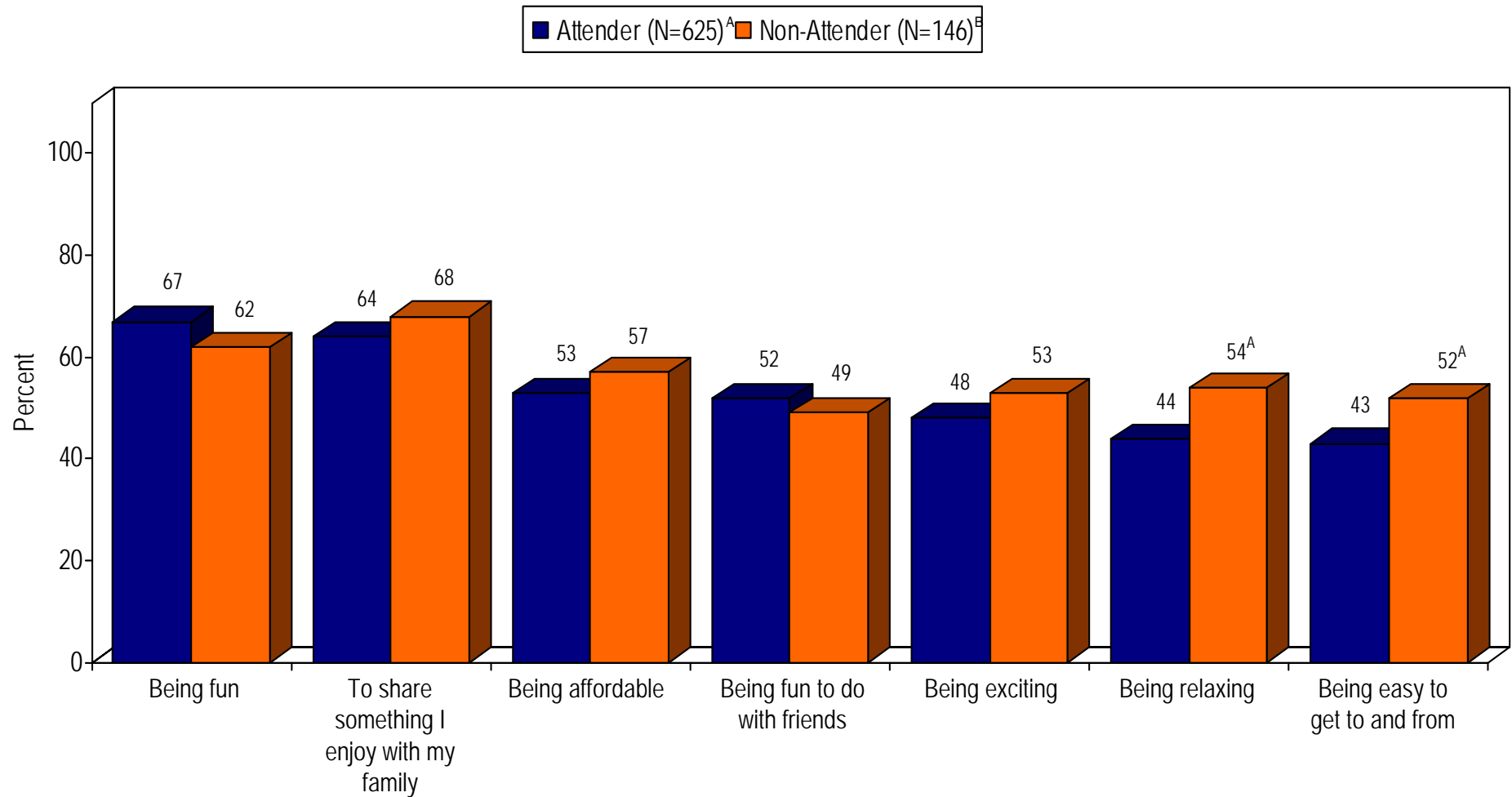
Q 8: Do you currently:

Objective 3: Determine Reasons For Attending Cultural Events





Figure 19: Influential Factors In Cultural Attendance



Base: Total respondents (N=800)

Q 6: When deciding what cultural events to attend, how important are each of the following?

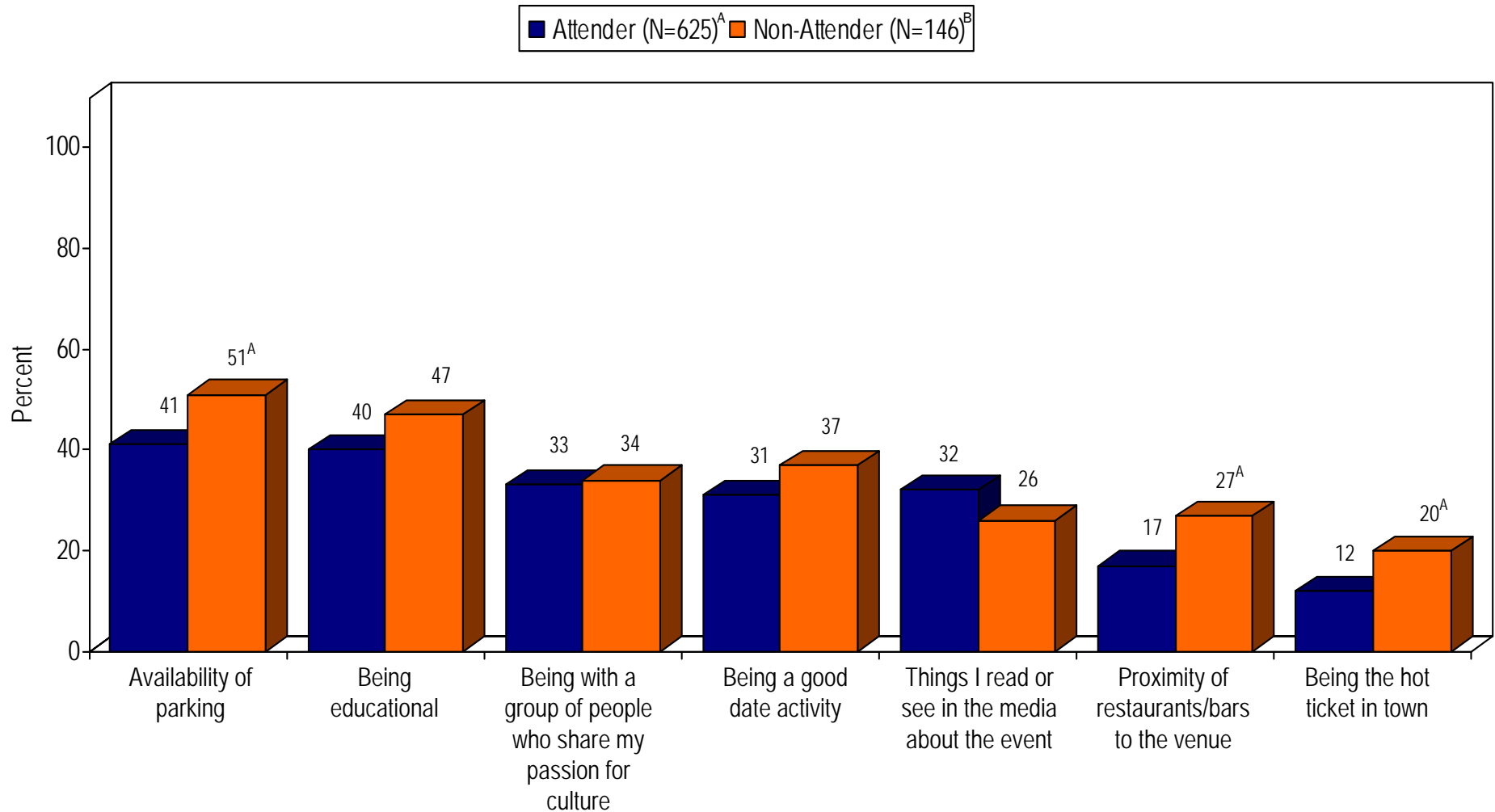
Note: Percentages represent those who answered a "6" or "7" on a 7-point scale, where 7 is "Extremely important" and 1 is "Not at all important"

Note: "A" or "B" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.

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Figure 19: Influential Factors In Cultural Attendance (Cont'd)



Base: Total respondents (N=800)

Q 6: When deciding what cultural events to attend, how important are each of the following?

Note: Percentages represent those who answered a "6" or "7" on a 7-point scale, where 7 is "Extremely important" and 1 is "Not at all important"

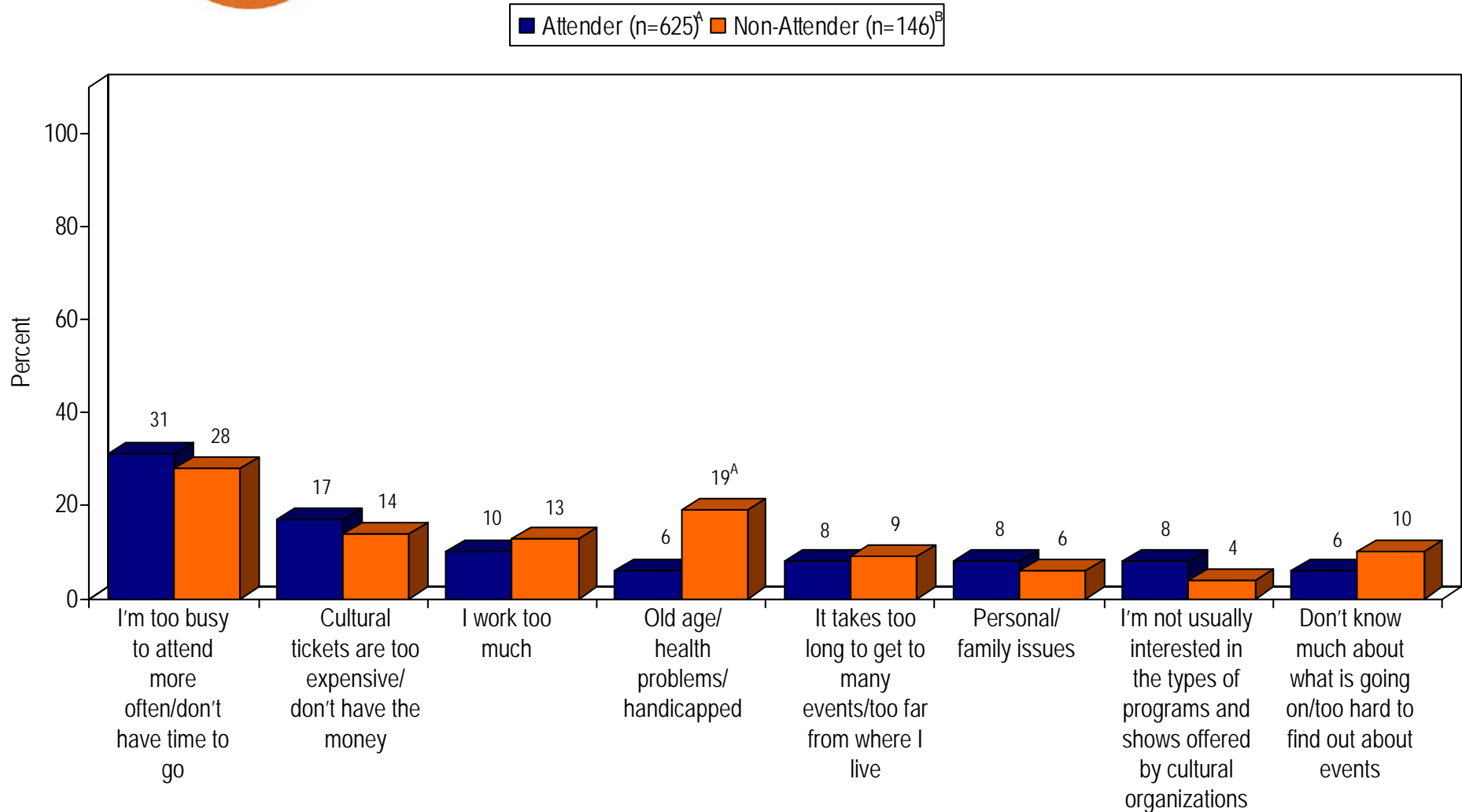
Note: "A" or "B" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.

Objective 4: Identify Obstacles To Attending Cultural Events





Figure 20: Reasons Don't Attend Cultural Events More Often (Unaided)



Base: Total respondents (N=800)

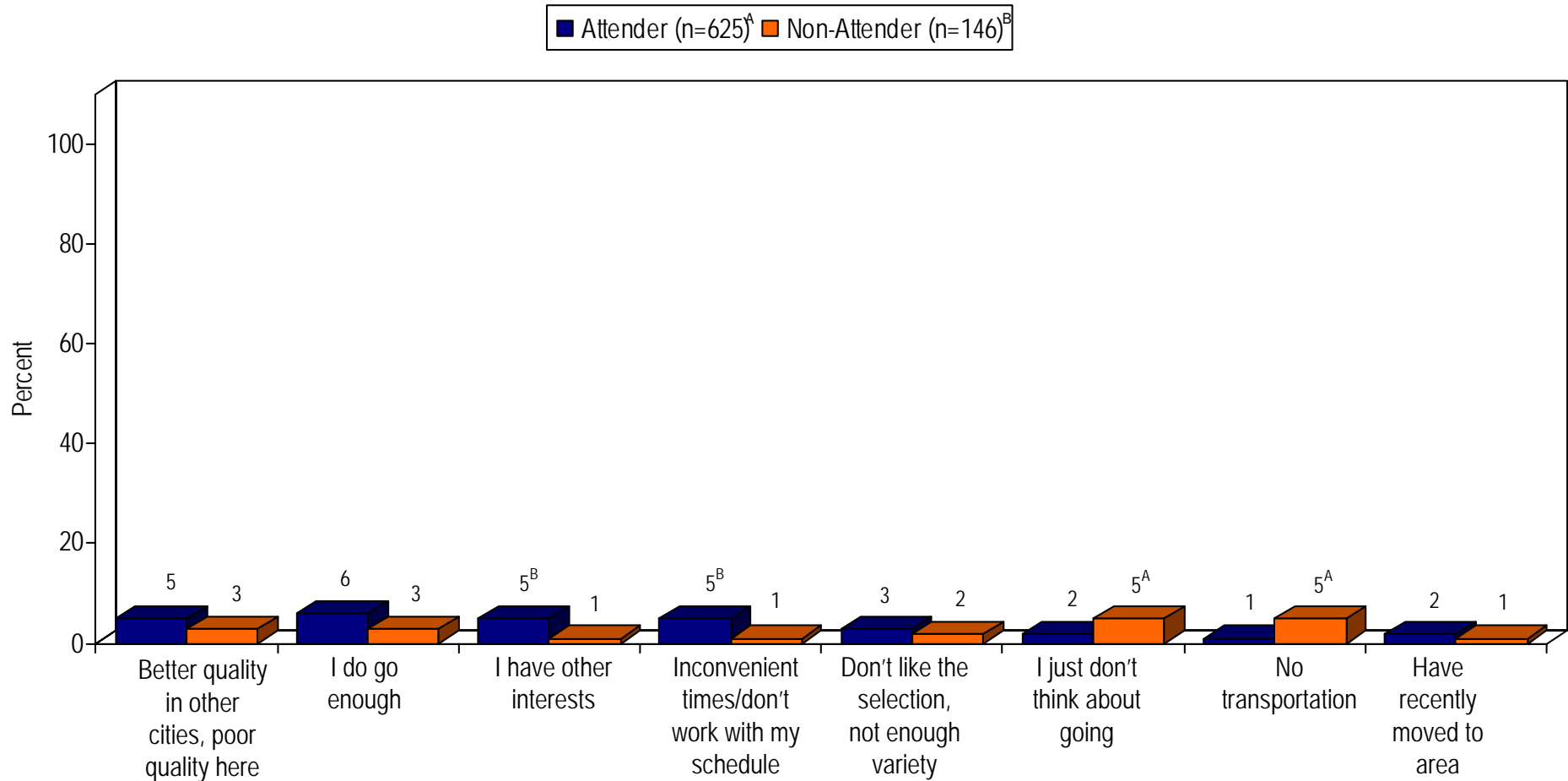
Q 4: Why don't you attend cultural events in Maricopa County more often than you do now? (Unaided)

Note: "A" or "B" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.

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Figure 20: Reasons Don't Attend Cultural Events More Often (Unaided) (Cont'd)



Base: Total respondents (N=800)

Q 4: Why don't you attend cultural events in Maricopa County more often than you do now? (Unaided)

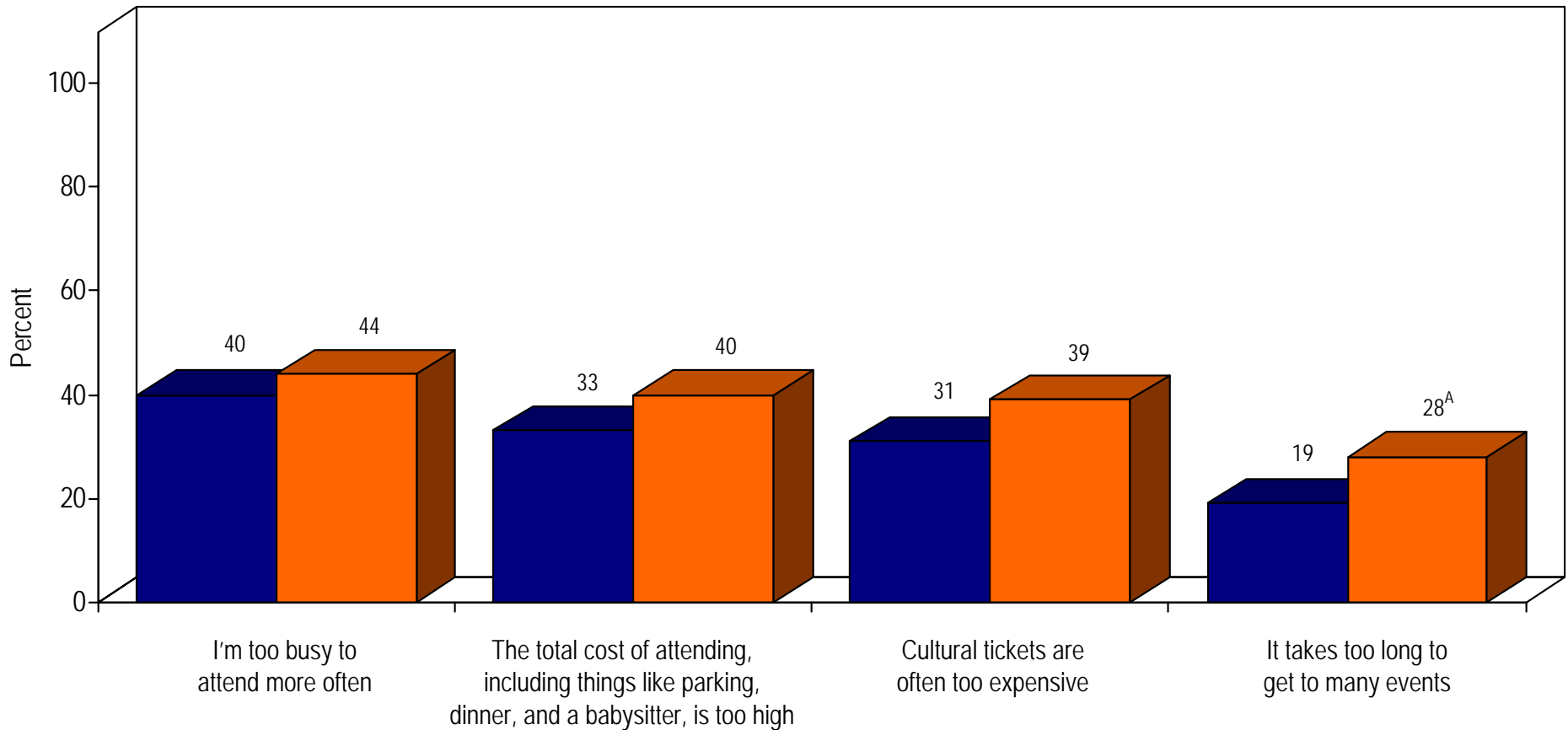
Note: "A" or "B" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.



Figure 21:

Reasons Don't Attend Cultural Events More Often (Aided)

■ Attender (N=625)^A ■ Non-Attender (N=146)^B



Base: Total respondents (N=800)

Q 6: When deciding what cultural events to attend, how important are each of the following?

Note: Percentages represent those who answered a "6" or "7" on a 7-point scale, where 7 is "Extremely important" and 1 is "Not at all important"

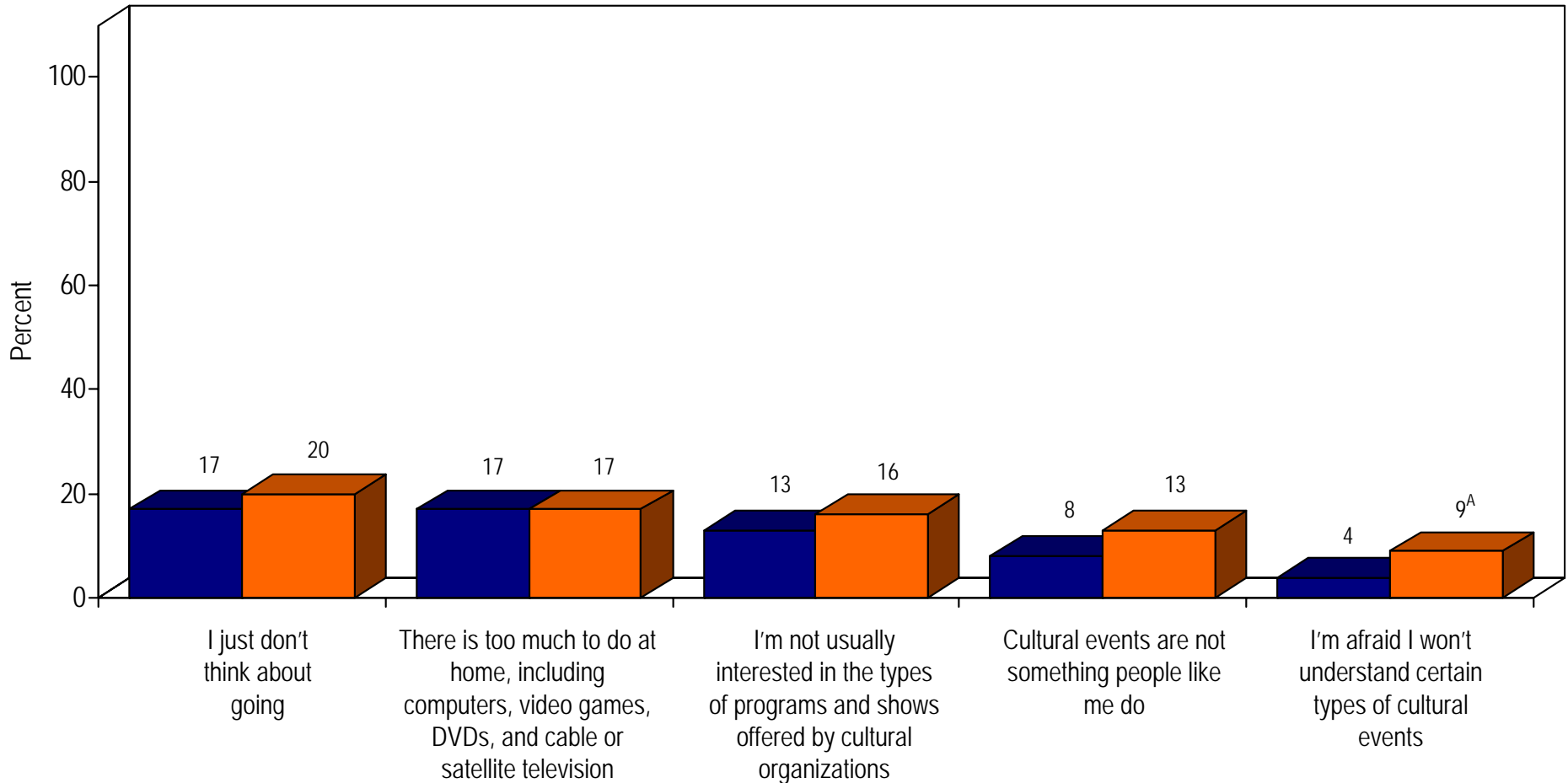
Note: "A" or "B" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.

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Figure 21: Reasons Don't Attend Cultural Events More Often (Aided) (Cont'd)

■ Attender (N=625)^A ■ Non-Attender (N=146)^B



Base: Total respondents (N=800)

Q 6: When deciding what cultural events to attend, how important are each of the following?

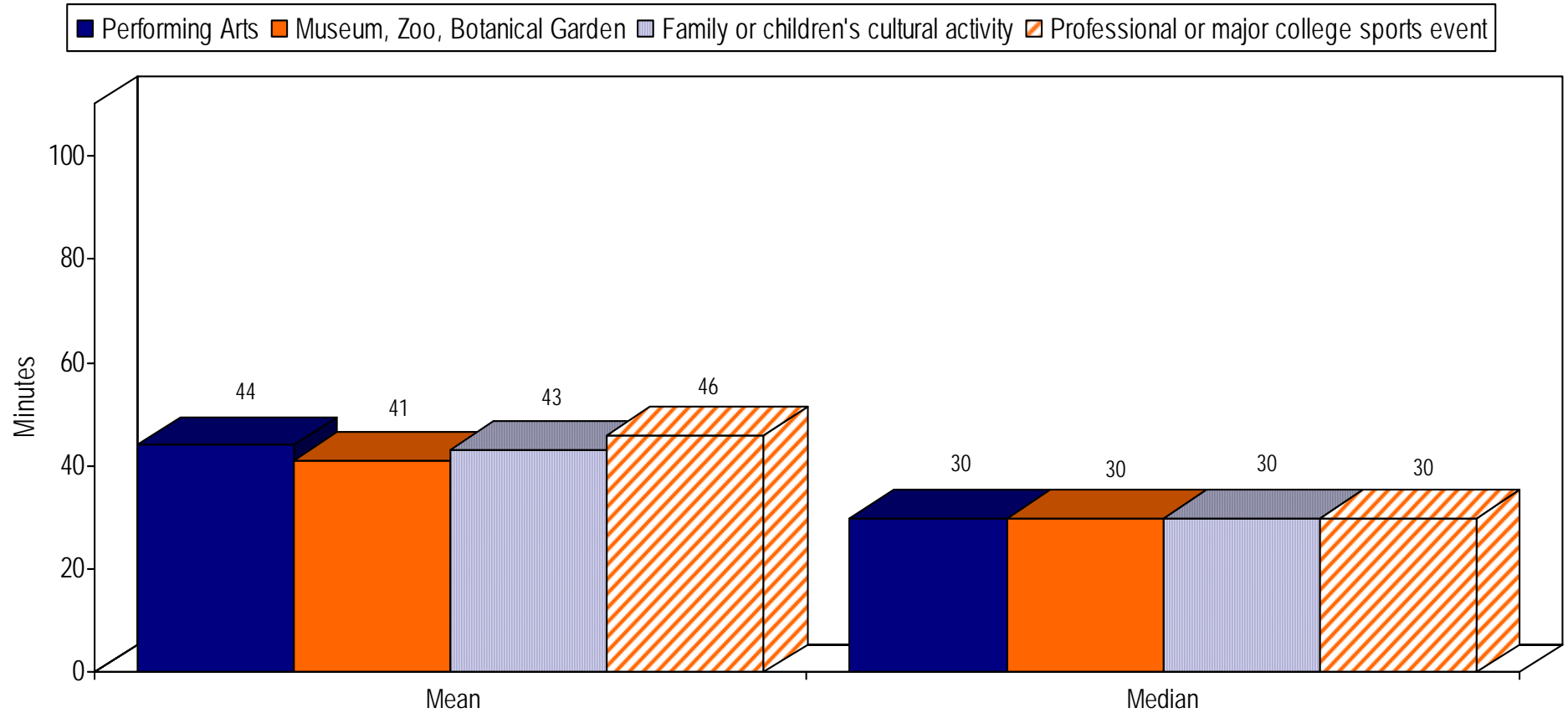
Note: Percentages represent those who answered a "6" or "7" on a 7-point scale, where 7 is "Extremely important" and 1 is "Not at all important"

Note: "A" or "B" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.



Figure 22:

Mean And Median Minutes Willing To Drive To Different Types Of Events



Base: Total respondents (N=800)

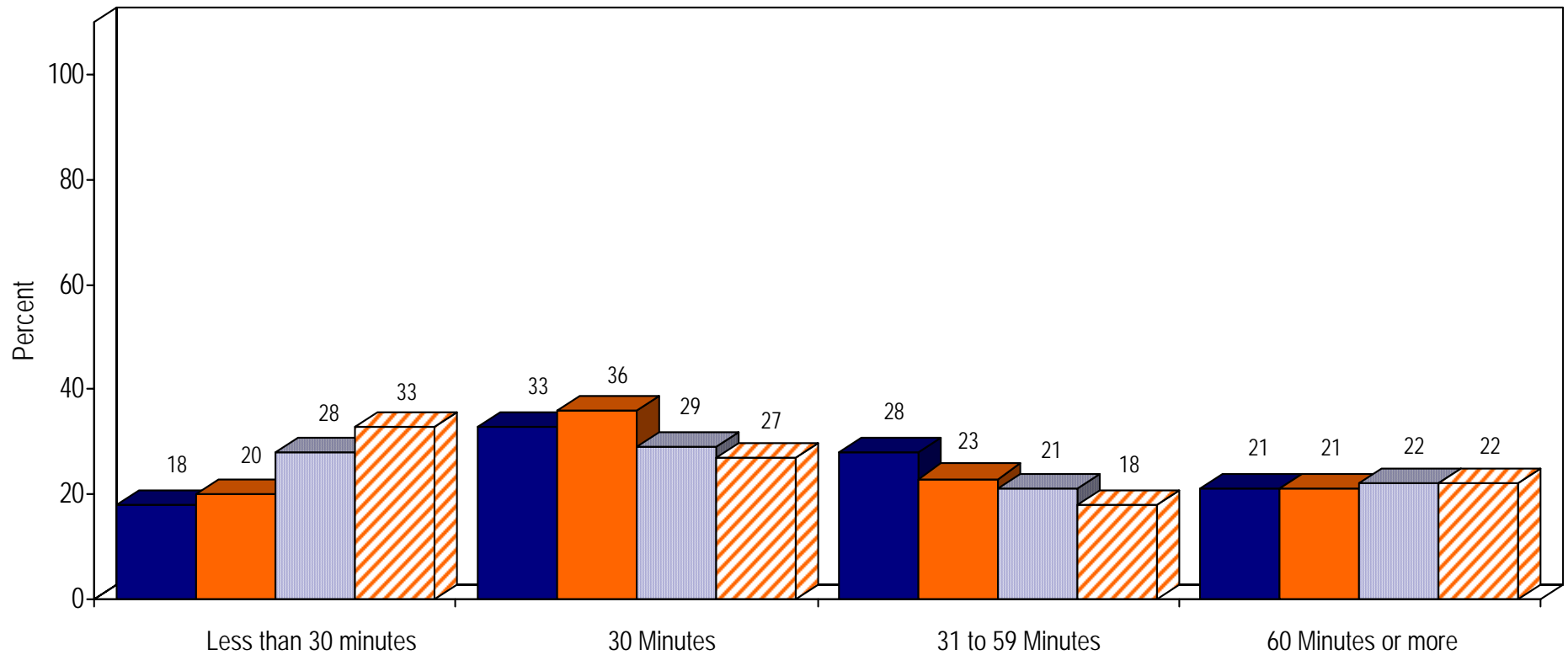
Q 7: How many minutes are you willing to drive to attend:



Figure 23:

Minutes Willing To Drive To Different Types Of Events

■ Performing Arts ■ Museum, Zoo, Botanical Garden ■ Family or children's cultural activity ■ Professional or major college sports event



Base: Total respondents (N=800)

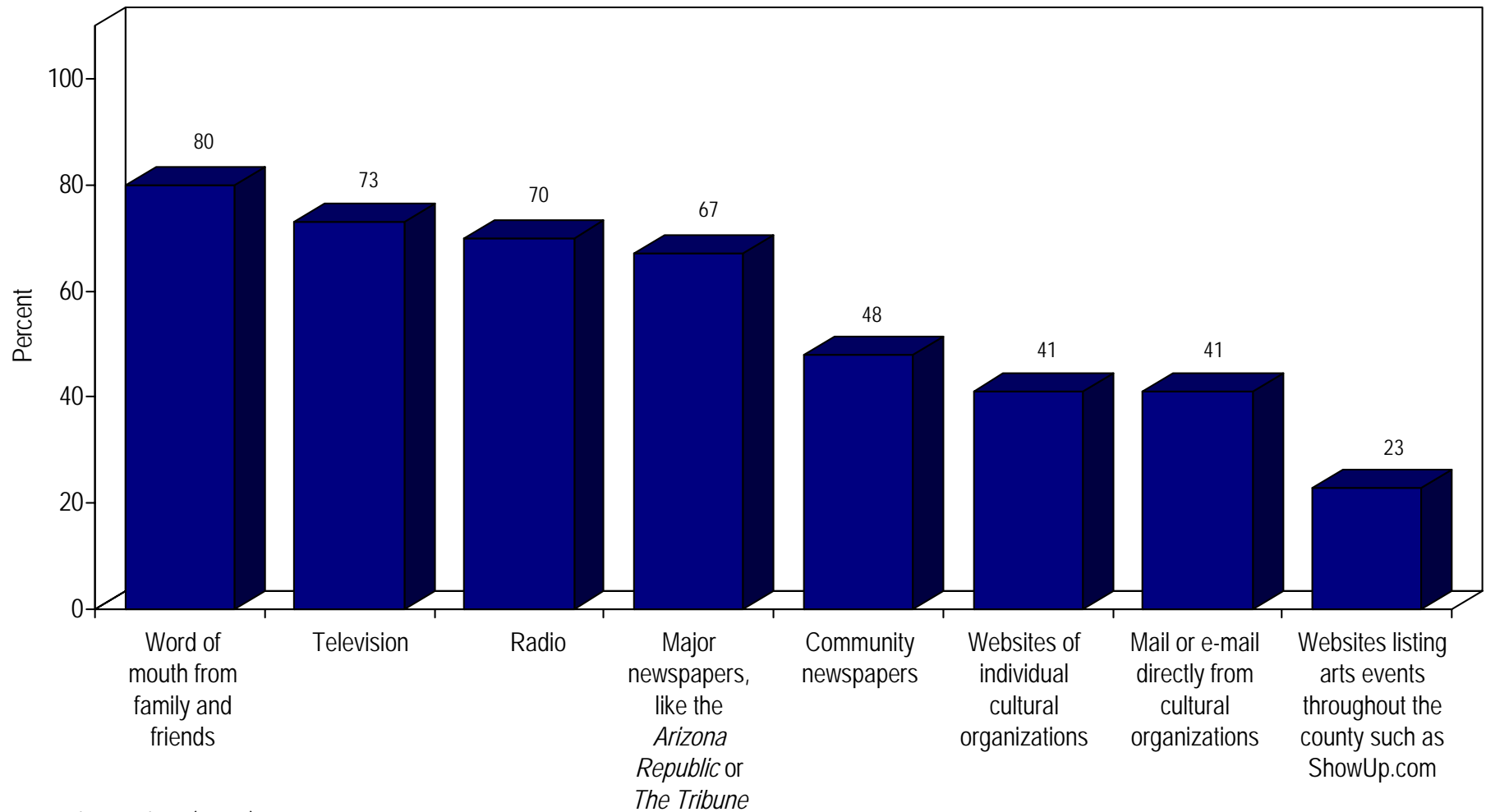
Q 7. How many minutes are you willing to drive to attend:

Objective 5: Identify Sources Of Cultural Event Information





Figure 24: Information Sources About Cultural Events



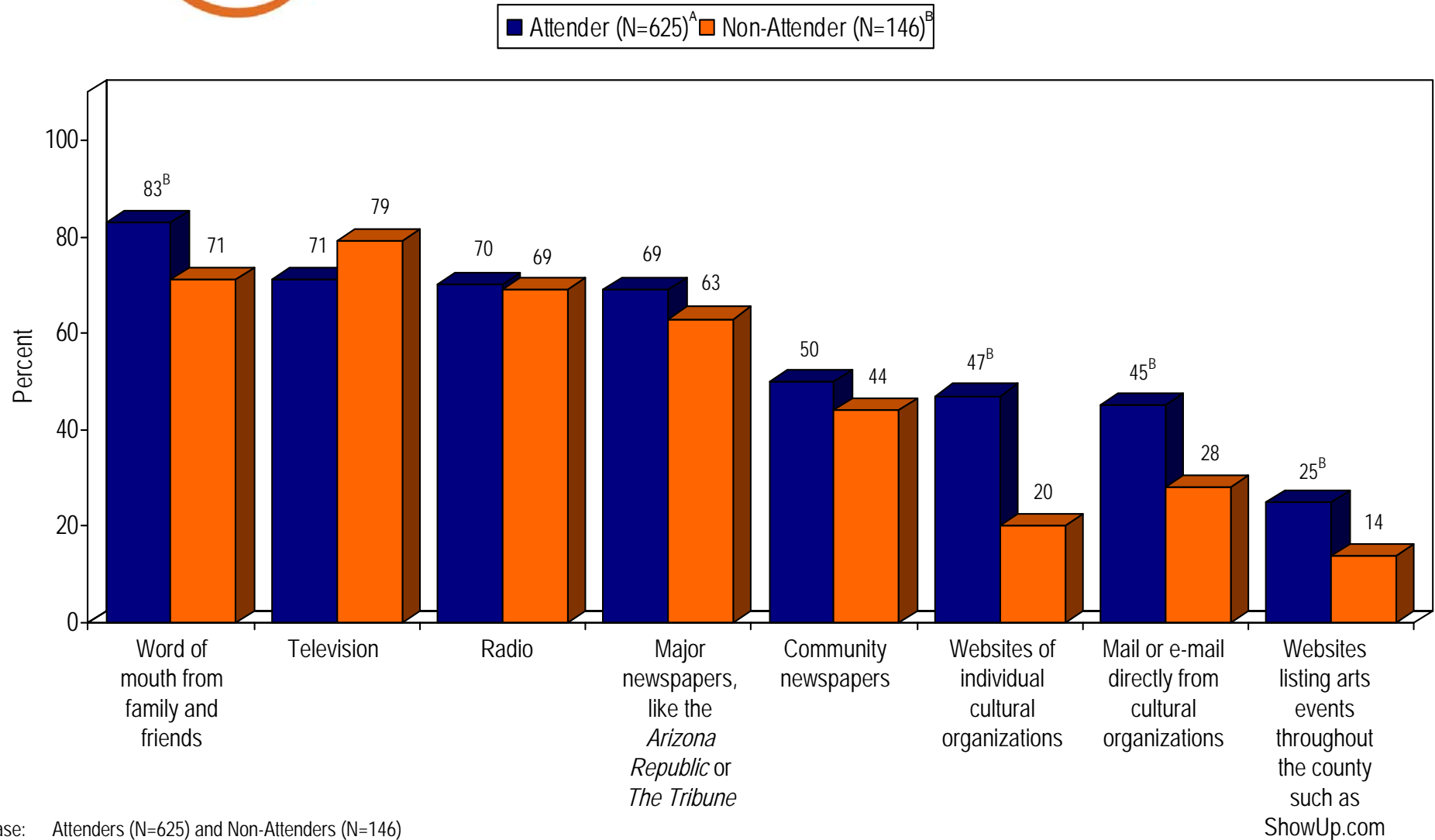
Base: Total respondents (N=800)

Q 10: Do you typically get information about cultural events in Maricopa County from the following sources:

Note: Percentages represent those who answered "Yes."



Figure 25: Information Sources About Cultural Events: Attendance Subgroups



Base: Attenders (N=625) and Non-Attenders (N=146)

Q 10: Do you typically get information about cultural events in Maricopa County from the following sources:

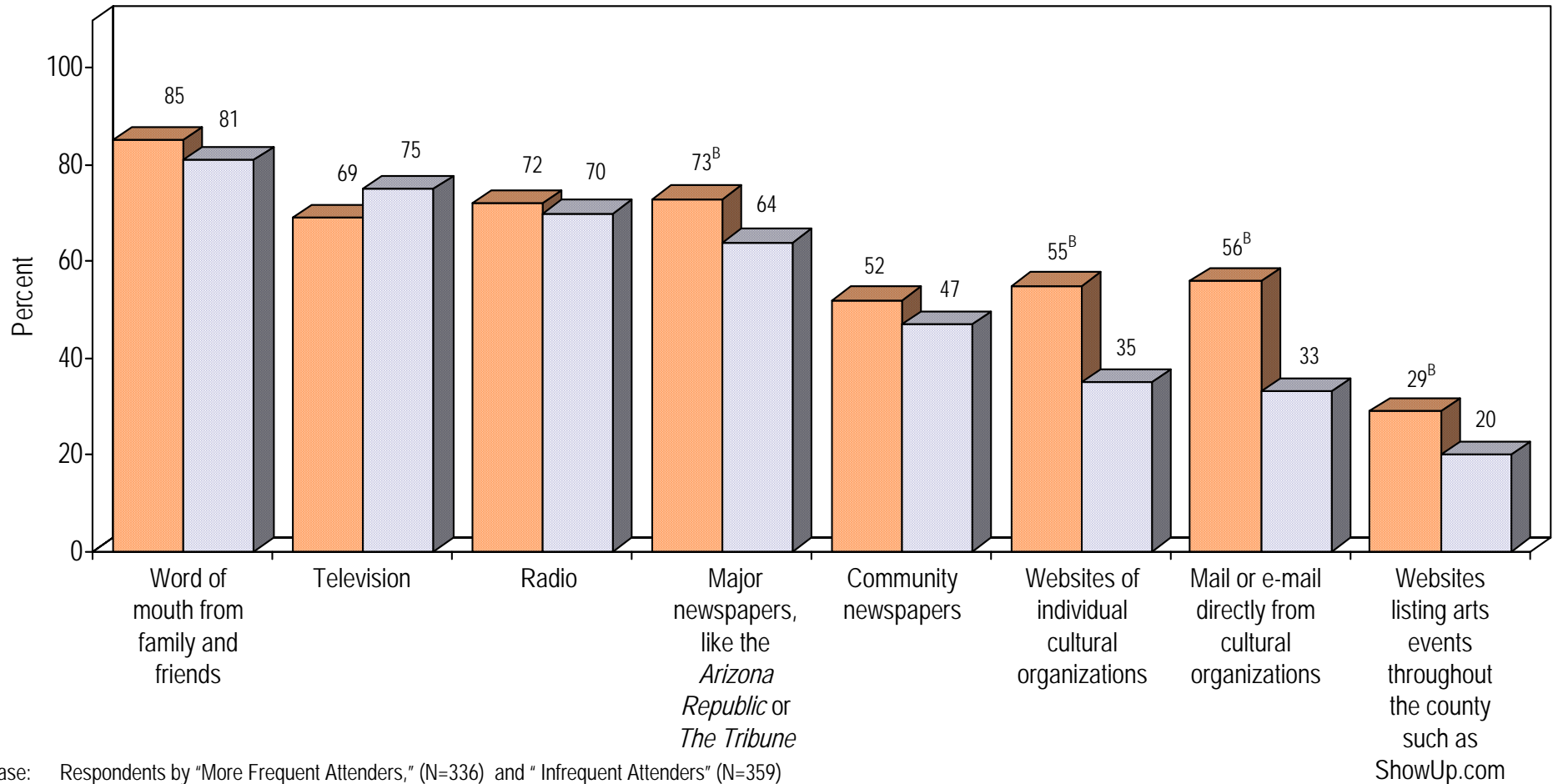
Note: Percentages represent those who answered "Yes."

Note: "A" or "B" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.



Figure 26: Information Sources About Cultural Events: Frequency Subgroups

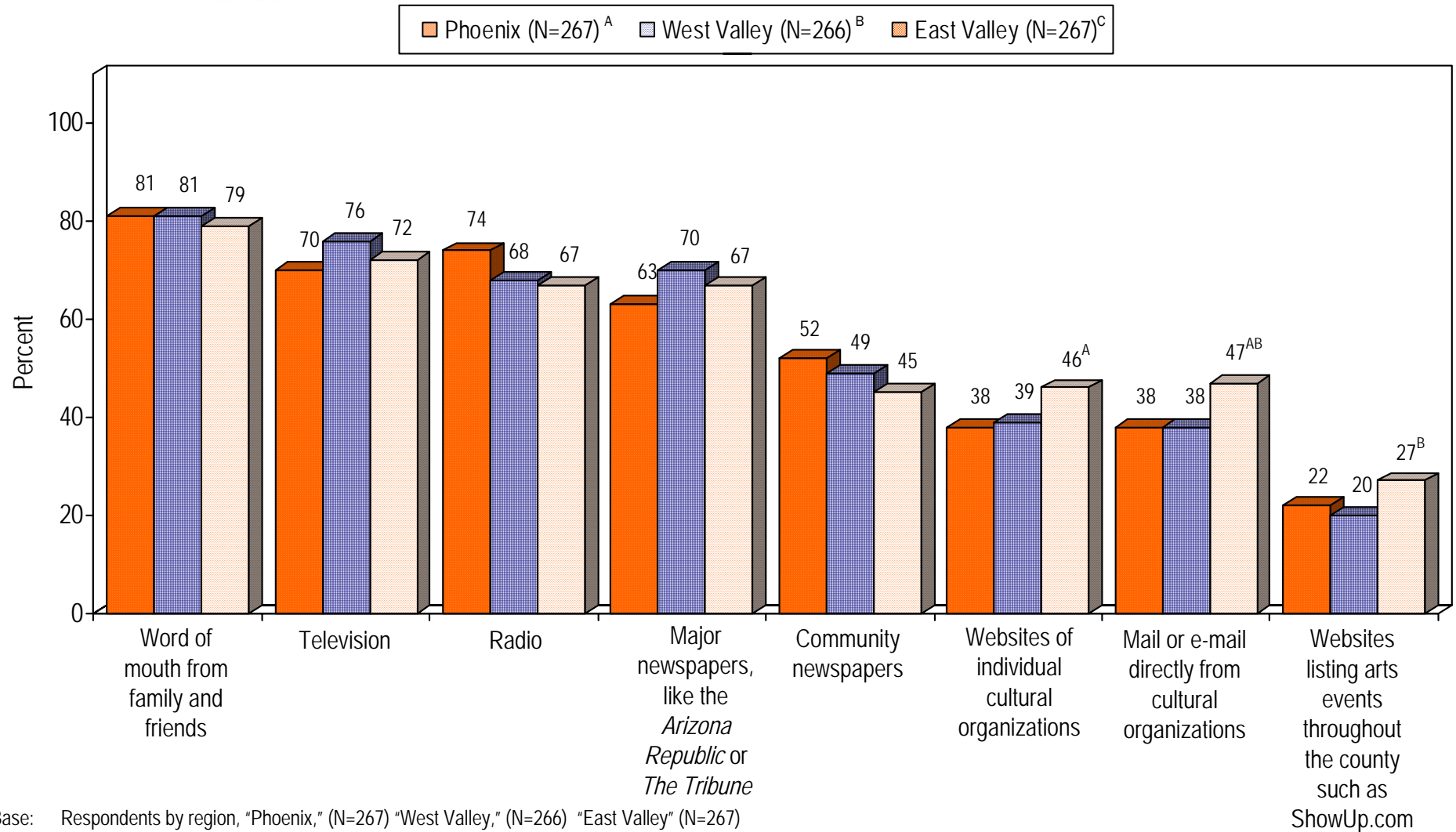
■ More Frequent Attenders (Attended Cultural Event 5+ Times in the Last Year) (N=336)^A
■ Infrequent Attenders (Attended Cultural Event 1-4 Times in the Last Year) (N=359)^B



Base: Respondents by "More Frequent Attenders," (N=336) and " Infrequent Attenders" (N=359)
 Q 10: Do you typically get information about cultural events in Maricopa County from the following sources:
 Note: Percentages represent those who answered "Yes."
 Note: "A" or "B" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.



Figure 27: Information Sources About Cultural Events: Region Subgroups



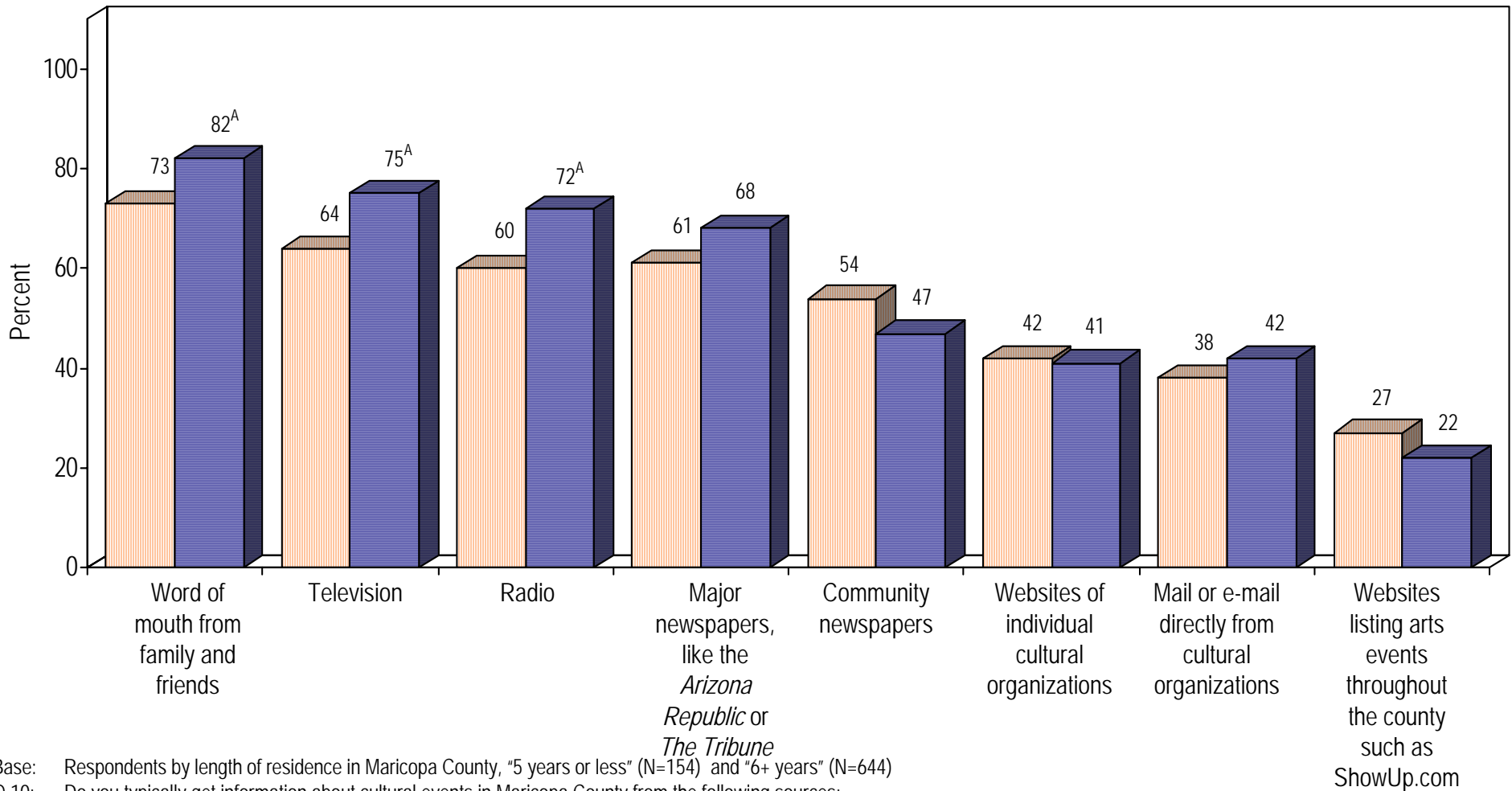
Base: Respondents by region, "Phoenix," (N=267) "West Valley," (N=266) "East Valley" (N=267)
 Q 10: Do you typically get information about cultural events in Maricopa County from the following sources:
 Note: Percentages represent those who answered "Yes."
 Note: "A," "B" or "C" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.



Figure 28:

Information Sources About Cultural Events: Length of Residency Subgroups

5 Years or Less Living in Maricopa County (N=154)^A 6+ Years Living in Maricopa County (N=644)^B



Base: Respondents by length of residence in Maricopa County, "5 years or less" (N=154) and "6+ years" (N=644)

Q 10: Do you typically get information about cultural events in Maricopa County from the following sources:

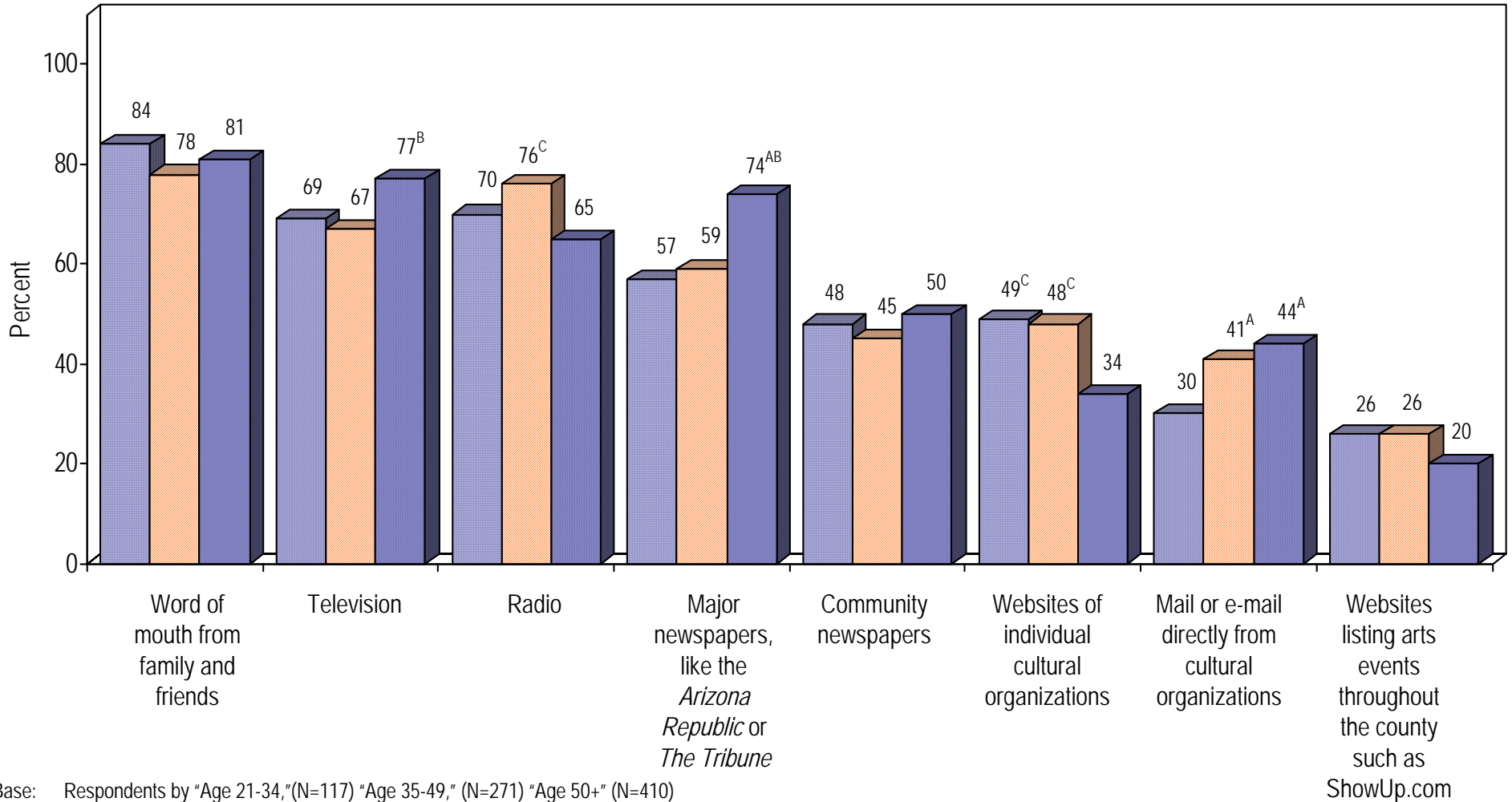
Note: Percentages represent those who answered "Yes."

Note: "A" or "B" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.



Figure 29: Information Sources About Cultural: Age Subgroups

■ Age 21-34 (N=117)^A ■ Age 35-49 (N=271)^B ■ Age 50+ (N=410)^C



Base: Respondents by "Age 21-34,"(N=117) "Age 35-49," (N=271) "Age 50+" (N=410)

Q 10: Do you typically get information about cultural events in Maricopa County from the following sources:

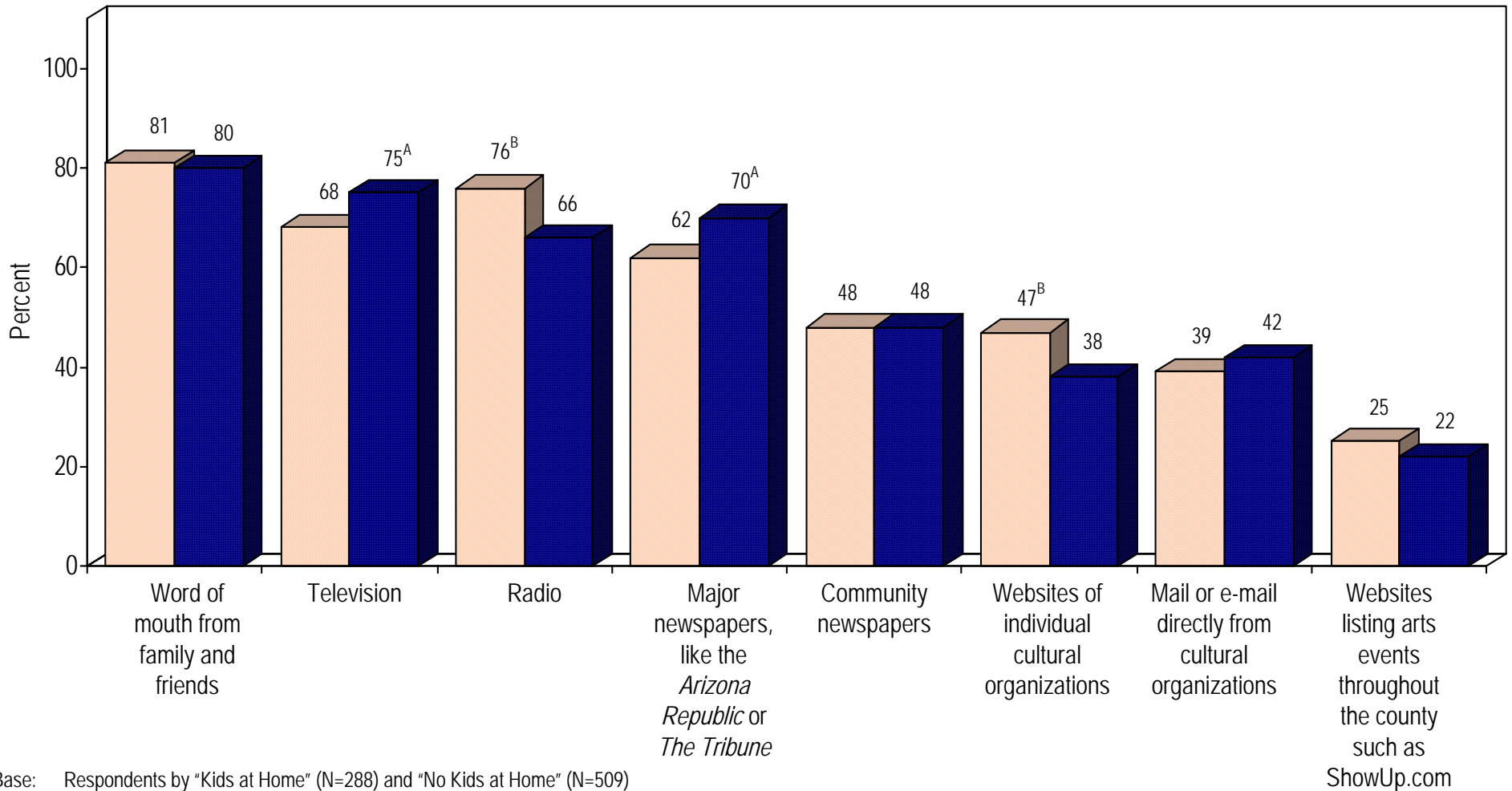
Note: Percentages represent those who answered "Yes."

Note: "A," "B" or "C" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.



Figure 30: Information Sources About Cultural Events: Kids at Home Subgroups

□ Kids at Home (N=288)^A ■ No Kids at Home (N=509)^B



Base: Respondents by "Kids at Home" (N=288) and "No Kids at Home" (N=509)

Q 10: Do you typically get information about cultural events in Maricopa County from the following sources:

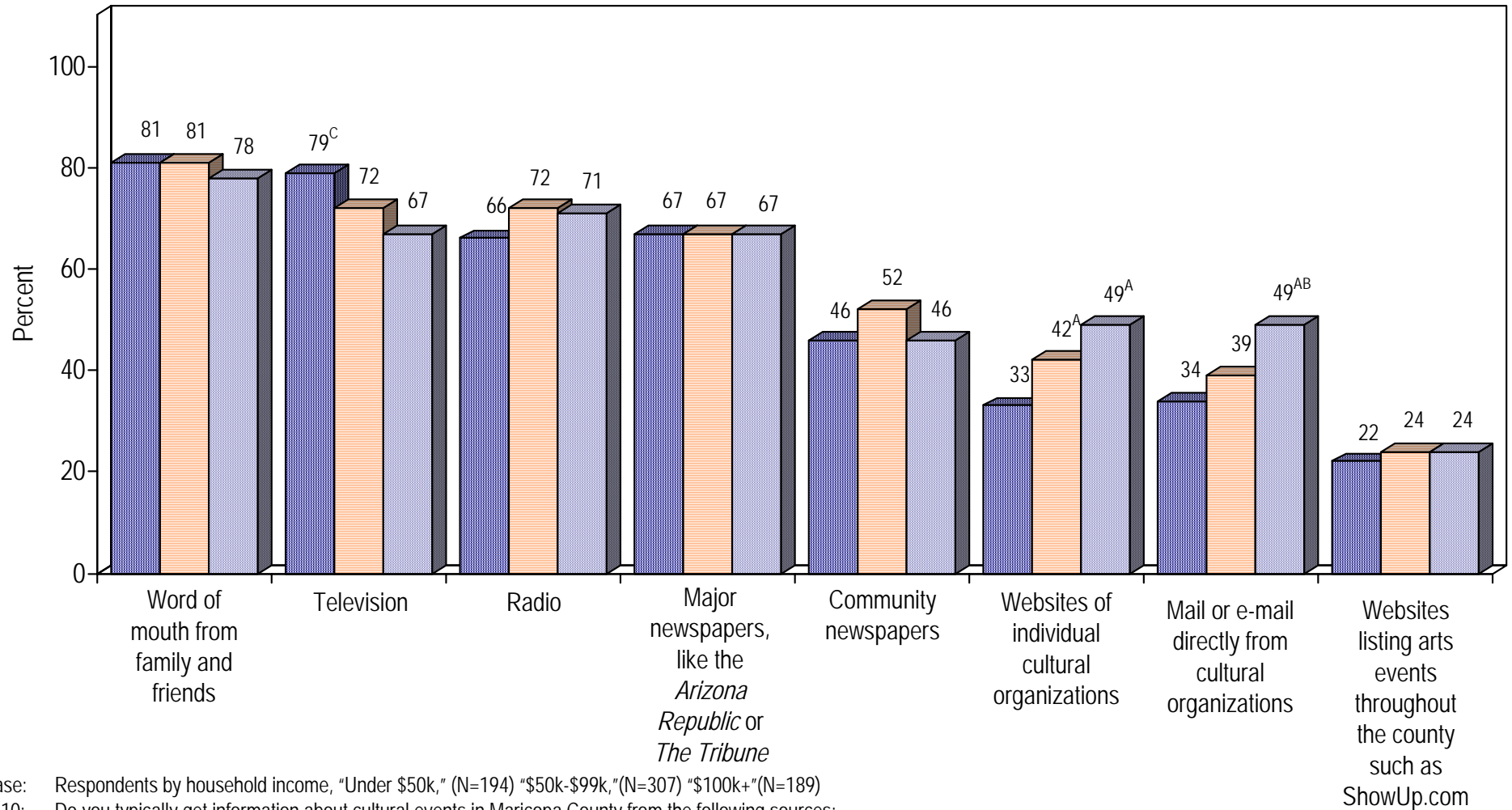
Note: Percentages represent those who answered "Yes."

Note: "A" or "B" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.



Figure 31: Information Sources About Cultural Events: Household Income Subgroups

■ Under \$50K (N=194)^A ■ \$50K-\$99K (N=307)^B ■ \$100K + (N=189)^C



Base: Respondents by household income, "Under \$50k," (N=194) "\$50k-\$99k,"(N=307) "\$100k+"(N=189)

Q 10: Do you typically get information about cultural events in Maricopa County from the following sources:

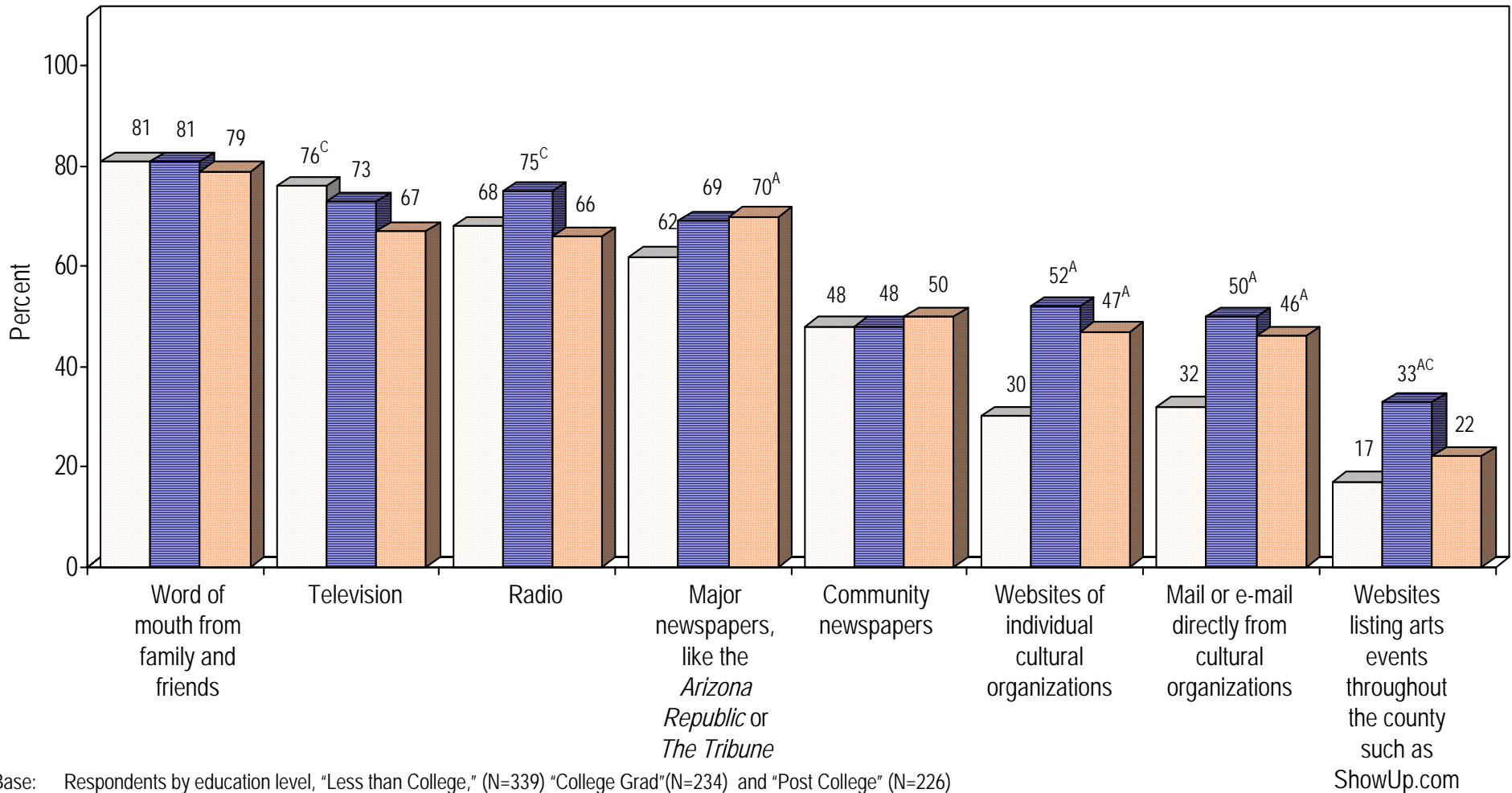
Note: Percentages represent those who answered "Yes."

Note: "A," "B" or "C" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.



Figure 32: Information Sources About Cultural Events: Education Subgroups

□ Less than College (N=339)^A ■ College Grad (N=234)^B ■ Post College (N=226)^C



Base: Respondents by education level, "Less than College," (N=339) "College Grad"(N=234) and "Post College" (N=226)

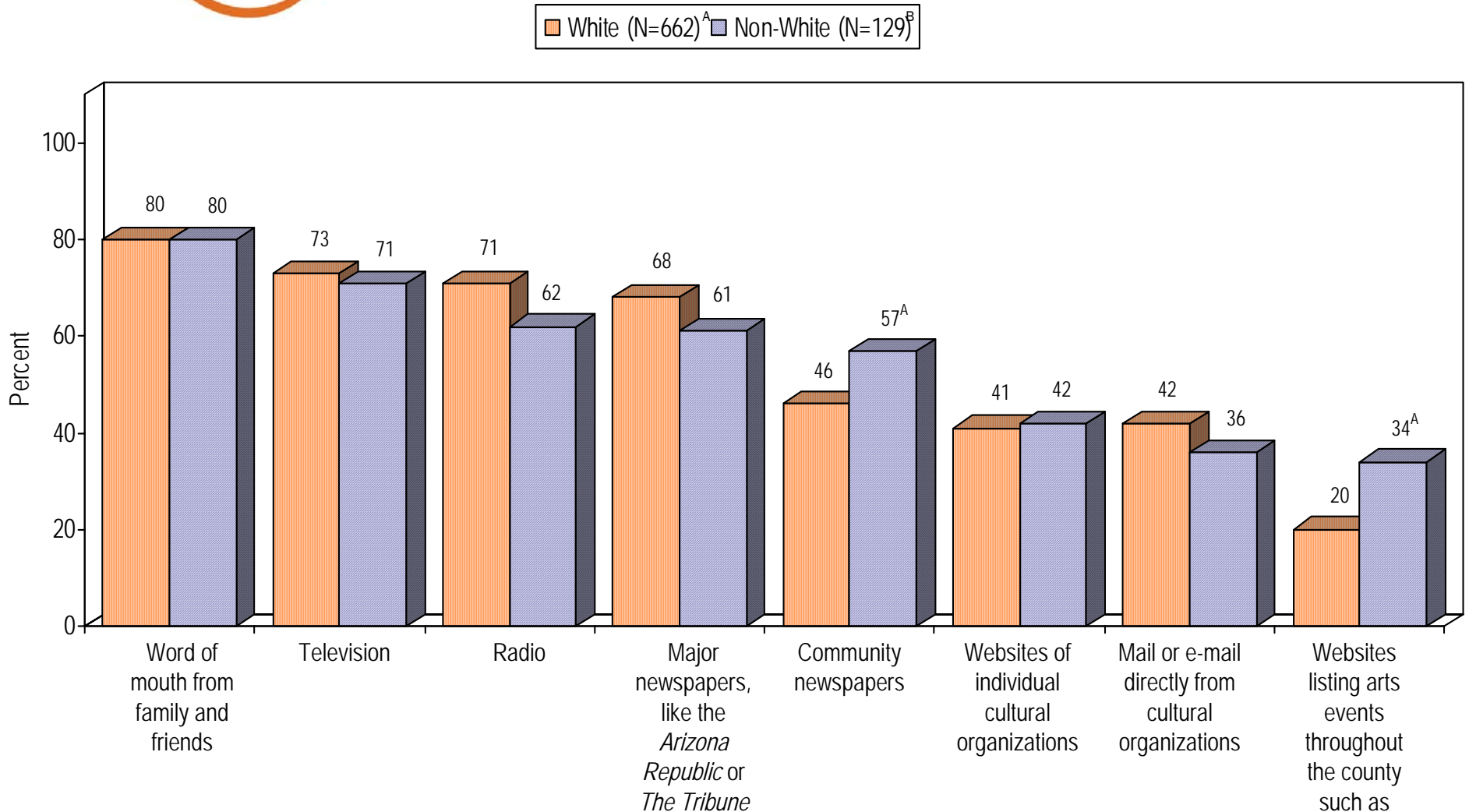
Q 10: Do you typically get information about cultural events in Maricopa County from the following sources:

Note: Percentages represent those who answered "Yes."

Note: "A," "B" or "C" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.



Figure 33: Information Sources About Cultural Events: Race/Ethnicity Subgroups



Base: Respondents by race/ethnicity, "White" (N=662) and "Non-White" (N=129)

Q 10: Do you typically get information about cultural events in Maricopa County from the following sources:

Note: Percentages represent those who answered "Yes."

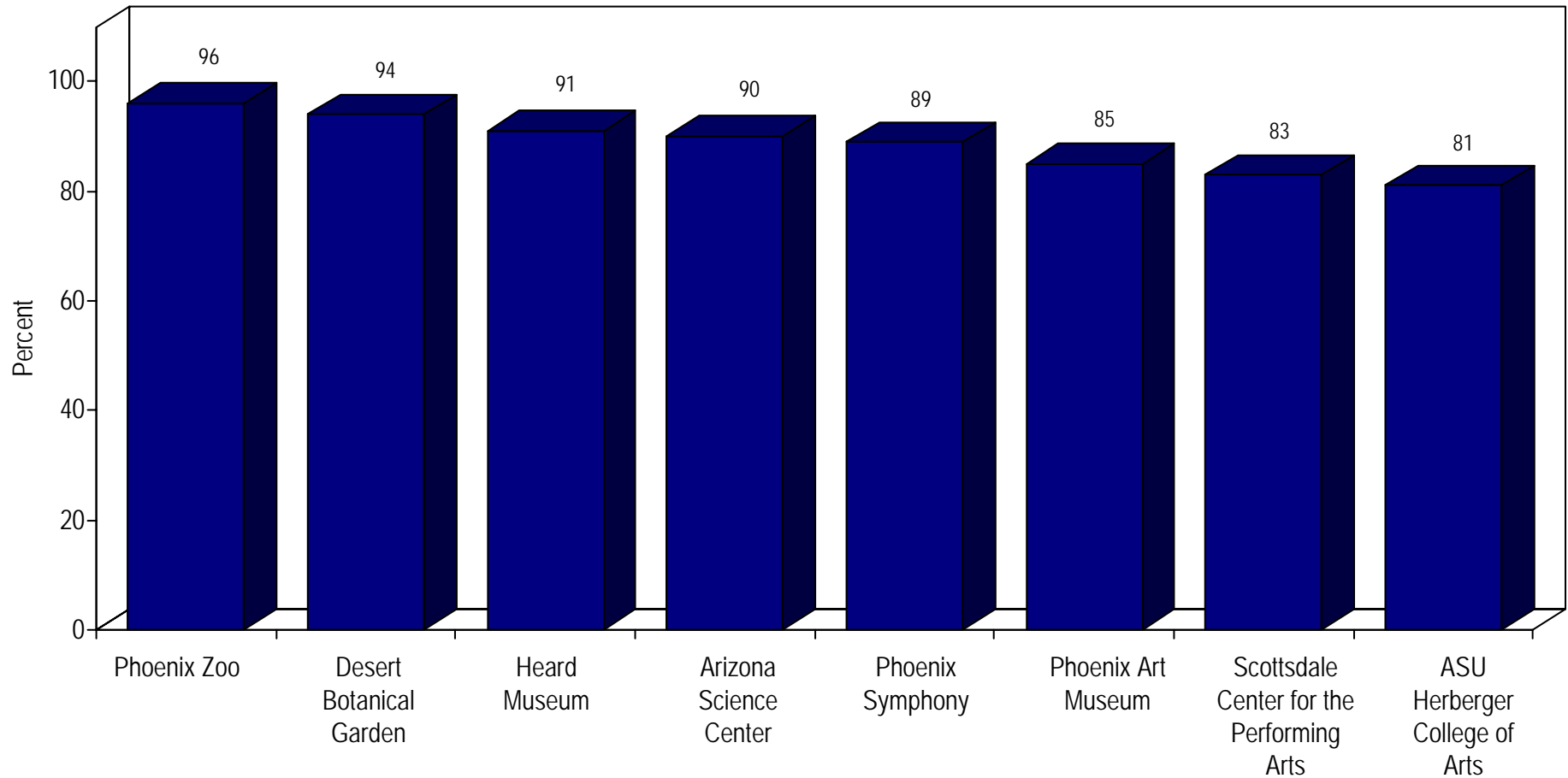
Note: "A" or "B" listed next to any percent indicates that column is significantly different from the column noted at the 95 percent confidence level.

Objective 6: Measure Awareness Of And Attendance To Cultural Institutions





Figure 34: Awareness Of Cultural Organizations

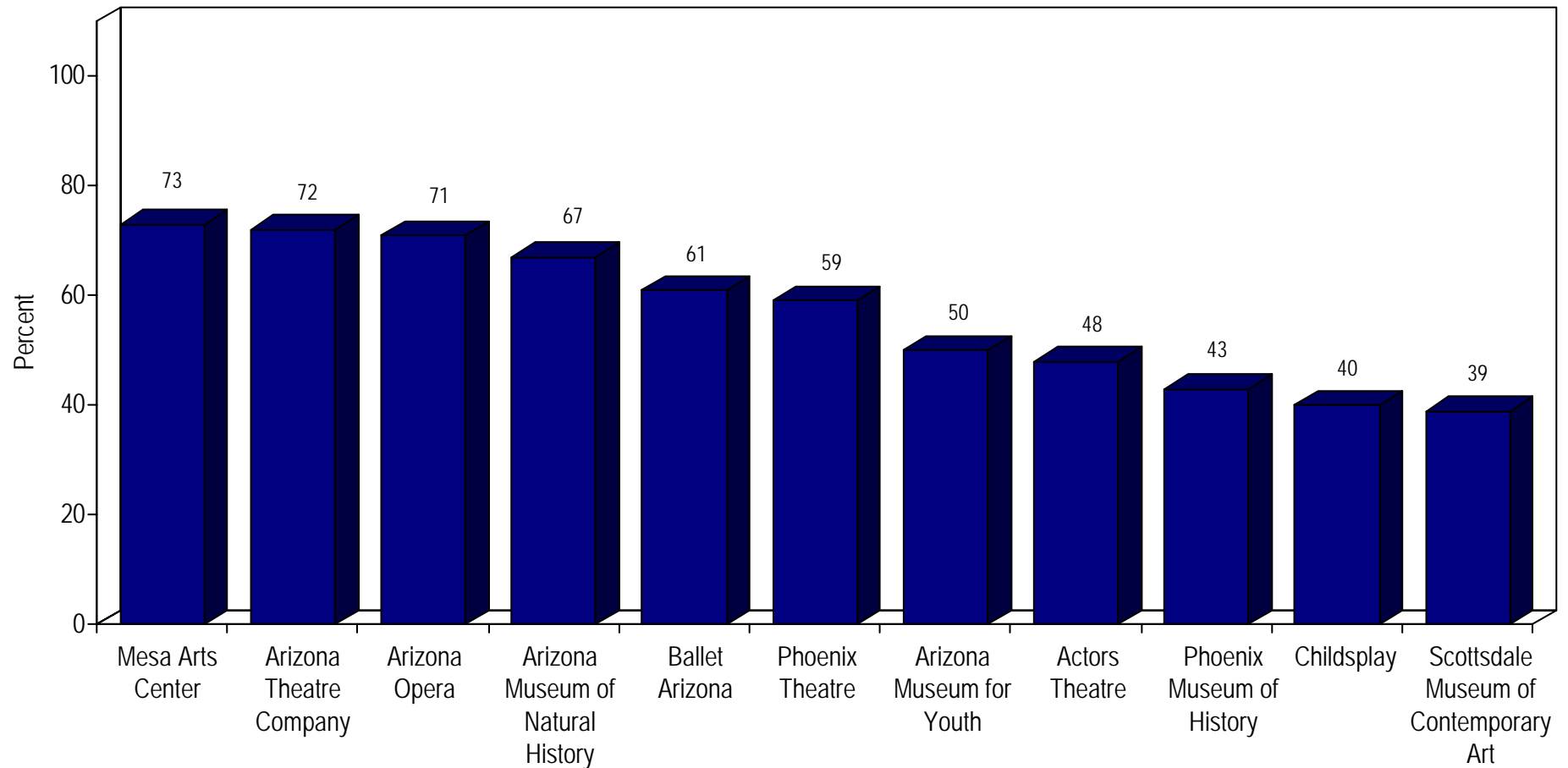


Base: Total Respondents (N=800)
Q 2a: Which, if any, of the following organizations have you heard of:
Note: Percentages represent those who answered "Yes."

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Figure 34: Awareness Of Cultural Organizations (Cont'd)



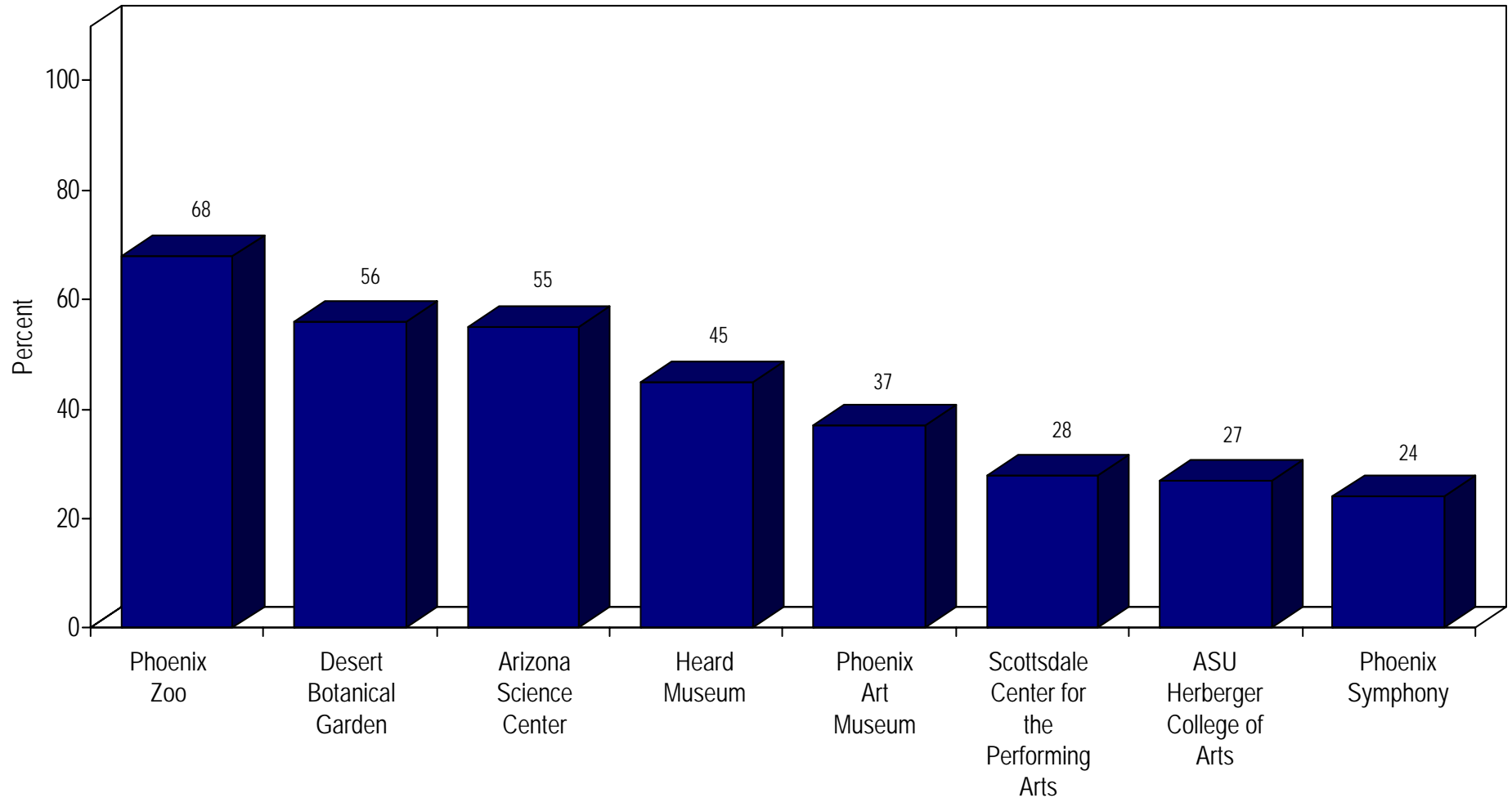
Base: Total respondents (N=800)

Q 2a: Which, if any, of the following organizations have you heard of:

Note: Percentages represent those who answered "Yes."



Figure 35: Attended Cultural Organizations In Last 2 Years

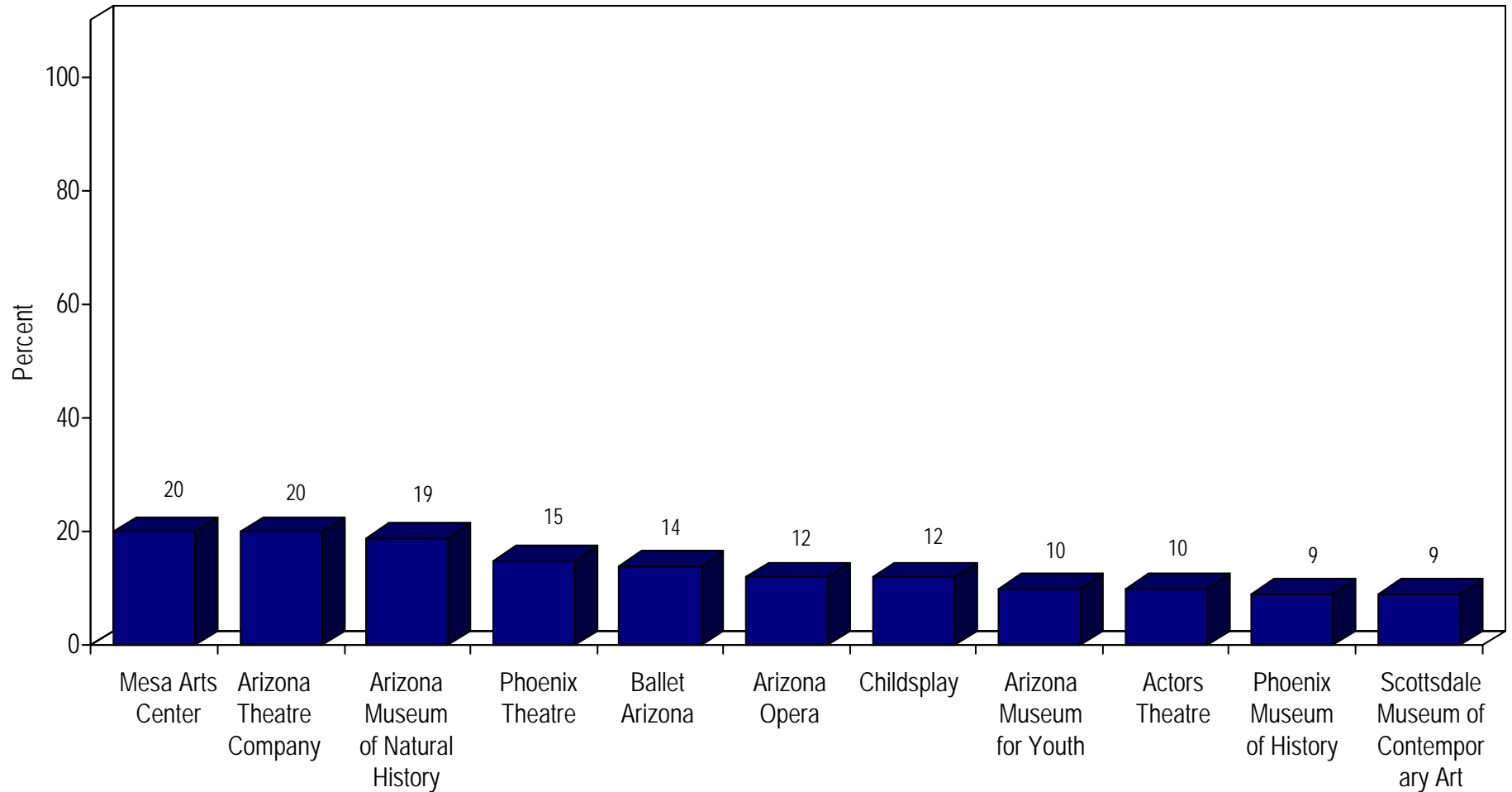


Base: Total respondents (N=800)
Q 2b: In the last 2 years, have you attended?
Note: Percentages represent those who answered "Yes."

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Figure 35: Attended Cultural Organizations In Last 2 Years (Cont'd)



Base: Total respondents (N=800)

Q 2b: In the last 2 years, have you attended?

Note: Percentages represent those who answered "Yes."

Appendix A: Respondent Profile





Respondent Profile

	Total (N=800)	Attenders (N=625)	Non-Attenders (N=146)
Live in Maricopa County			
Year round	95%	95%	98%
Part of the year	5%	5%	2%
Age			
21 to 34	15%	16%	12%
35 to 49	34%	35%	28%
50 to 64	33%	33%	36%
65 to 74	11%	11%	14%
75+	7%	5%	10%
Length of Residency			
Less than 5 years	19%	19%	14%
6 years or more	81%	81%	86%
Education			
Less than college	42%	37%	64%
College degree	29%	31%	22%
Graduate work or degree	28%	32%	14%



	Total (N=800)	Attenders (N=625)	Non-Attenders (N=146)
Have Children at Home			
Yes	36%	39%	27%
No	64%	61%	73%
Race/Ethnicity			
White	83%	84%	79%
African American	5%	4%	7%
Hispanic/Latino	8%	8%	8%
Other	4%	4%	6%
HH Income			
Under \$50K	28%	24%	41%
\$50K - \$99K	45%	45%	45%
\$100K+	27%	31%	14%
Gender			
Male	40%	40%	43%
Female	60%	60%	58%



	Total (N=800)	Attendees (N=625)	Non-Attendees (N=146)
Segment			
Phoenix	33%	33%	33%
West Valley	33%	33%	38%
East Valley	33%	34%	30%

Appendix B: Conclusions And Recommendations





Conclusions And Recommendations

1. **Conclusion:** There is a perception that Maricopa has fewer cultural events than other markets and satisfaction with existing cultural events is just moderate.
 - **Recommendation:** There is a need for collaboration across cultural organizations to promote the cultural community including the breadth and quality of offering. Current attitudes also make broad based donor appeals difficult since quality is not perceived as high. However, it may motivate stakeholders, who make larger gifts, to support the arts to change the community's perceptions.
2. **Conclusion:** Demographic subgroups less satisfied with area cultural events than others are younger adults (age 21-34 and 35-49) and non-whites.
 - **Recommendation:** Particular effort should be targeted at communicating with these groups using media consumed by these groups.
3. **Conclusion:** Museums in Maricopa County tend to be rated higher on perceived quality than performing arts organizations.
 - **Recommendation:** Any communications program must have a component that educates specifically about the performing arts in Maricopa County.
4. **Conclusion:** Most say it is important that the cultural organizations in Maricopa County be successful and that diverse cultural organizations improve the quality of life in Maricopa County.
 - **Recommendation:** Since most agree with these statements, they can be used as a source of engagement for the community to grow participation in cultural events through a category-wide effort.



Conclusions And Recommendations

5. **Conclusion:** Many people say they are getting out of the house less than they used to and they are attending fewer cultural events than before, even though they agree that the quality of cultural events in the area is improving.
 - **Recommendation:** Increasing cultural participation is a challenge given the trends of going out less and attending fewer events. The cultural community must develop a campaign that convincingly promotes the joy and value of the arts.

6. **Conclusion:** The major reason people go to cultural events is that they are fun and something they can share with their families. Attributes less important are being exciting, relaxing, and educational.
 - **Recommendation:** The fact that cultural events can be fun and shared with families are important messages to communicate about Maricopa's arts community in a campaign promoting the joy and value of the arts.

7. **Conclusion:** About eight in ten residents attended some type of cultural event in the last year.
 - **Recommendation:** Given the significant number who attend some type of event, it may make more sense to target arts attenders and attempt to motivate them to attend more often or attend a greater variety of events than converting non-attenders to attenders. Moderate to infrequent attenders may be the best category.



Conclusions And Recommendations

8. **Conclusion:** In a finding contrary to many other markets, a higher percentage of younger people (21-34 and 35-49) have attended a cultural event in the last 6 months than older people. Another contrary finding is that the participation rate is similar among whites and non-whites. More of those with children living at home attend cultural events as do those with higher educations and incomes.
 - **Recommendation:** There appears to be an opportunity to build participation among those age 50 and up since that group is typically seen as most likely to attend arts events and may be under consuming (they typically have the time and resources). There are also opportunities for cultural organizations to develop programming that appeals to non-whites since they are active arts participants.
9. **Conclusion:** There is a small segment of people who attend cultural events nearly once a month or more.
 - **Recommendation:** This segment should be encouraged to “try something new” and patronize an organization they don’t usually attend.
10. **Conclusion:** The major reasons people don’t attend the arts more, and why non-attenders don’t participate at all, are that they are busy and don’t have time to attend more, tickets are expensive, and the total cost of attending (parking, dinner, babysitter) is high.
 - **Recommendation:** Cultural organizations can address concerns about busy schedules by creating extended hours on selected days, communicating that tickets are typically available the day of performance, and offering exchange (perhaps at a fee) for individual purchasers. The community could also develop and publish a list of discounting programs and promotions that makes it possible to attend at a reduced cost for each individual organization. (The case also must be made to promote value of cultural engagement over cost).



Conclusions And Recommendations

11. **Conclusion:** Most people are willing to drive 30-45 minutes to attend a cultural event.
 - **Recommendation:** This finding allows each organization to understand its own primary market by mapping the communities that fall within this optimal drive time. It also suggests that people are willing to drive fairly far within the area to attend cultural events and will cross geographic areas.

12. **Conclusion:** Word of mouth is a powerful source of cultural information.
 - **Recommendation:** Organizations can attempt to facilitate word of mouth by providing blogs on their websites (where readers can post comments) or distributing postcards or e-mails that people can share with their friends and colleagues if they particularly enjoyed an event.

13. **Conclusion:** Television, radio and major newspapers are the primary sources of media used to get cultural information among all demographic groups.
 - **Recommendation:** Any collaborative communications program about cultural events in Maricopa County should attempt to use these media (If affordable).



Conclusions And Recommendations

14. **Conclusion:** Online media as a source for cultural information is used particularly by arts attenders, frequent arts attenders, those living in the East Valley, younger people, those with kids at home, higher income people, and more educated people.
 - **Recommendation:** Electronic media can be used when targeting these particular segments. It tends to be more of a maintenance method of communications among those already attending than an acquisitions method.

15. **Conclusion:** The number of donors/members far surpasses the number of subscribers in the market.
 - **Recommendation:** Donor/non-subscribers appear to be a growing segment supporting cultural activities.

Appendix C: Sample Organization Profile





Sample Organization Profile

	SAMPLE ORGANIZATION (N=426)	TOTAL RESPONDENTS (N=800)
AGE		
21 to 34	17%	15%
35 to 49	29%	34%
50+	54%	51%
Mean	49	52
KIDS AT HOME		
Under age 12	27%	27%
12 to 17 years old	19%	16%
LENGTH OF RESIDENCE IN MARICOPA COUNTY		
1 to 5 years	13%	19%
6 to 14 years	22%	23%
15+	65%	58%



Sample Organization Profile (Cont'd)

	SAMPLE THEATRE (N=426)	TOTAL RESPONDENTS (N=800)
EDUCATION		
Less than college	44%	42%
College graduate	30%	29%
Some graduate work	7%	9%
Graduate degree	19%	20%
HOUSEHOLD INCOME		
Under \$50k	22%	28%
\$50k to \$99k	38%	44%
\$100k+	40%	28%
Mean	\$80k	\$87k
RACE		
White	89%	83%
Black	6%	5%
Hispanic	4%	8%
Other	1%	4%



Sample Organization Profile (Cont'd)

	SAMPLE THEATRE (N=426)	TOTAL RESPONDENTS (N=800)
RESIDENCE		
Phoenix	50%	33%
West Valley	33%	33%
East Valley	17%	33%
LAST TIME ATTENDED AN ARTS EVENT		
In the last month	47%	34%
2 to 3 months ago	25%	15%
4 to 6 months ago	11%	16%
7 to 12 months ago	2%	14%
More than a year ago	15%	18%
IN THE LAST YEAR, TIMES ATTENDED		
Live, professional performing arts event (mean)	6	3
A museum, zoo or botanical garden (mean)	8	4



Sample Organization Profile (Cont'd)

	SAMPLE THEATRE (N=426)	TOTAL RESPONDENTS (N=800)
IN THE LAST YEAR, ATTENDED		
A zoo	70%	72%
An art museum	83%	60%
A botanical garden	66%	57%
A science museum	62%	56%
Any other theater	53%	43%
A historical museum	52%	40%
Performances for families and young people	26%	34%
The symphony or classical music	90%	31%
Broadway touring shows	23%	28%
Dance or ballet	15%	24%
A children's museum	58%	19%
Opera	38%	12%
SUBSCRIBE OR DONATE ANYWHERE		
Yes, subscribe	20%	12%
Yes, donate	12%	28%
AWARENESS		
Aware	49%	70%
ATTENDANCE		
Attended in last 2 years	19%	26%