



Performing Arts Research Coalition
Community Report

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THE PEW CHARITABLE TRUSTS



Performing Arts Research Coalition Community Report

Findings from a 2002 Household Survey in Sarasota and
Manatee Counties

Mary Kopczynski and Mark Hager of the Urban Institute

A collaborative project of the Association of Performing Arts
Presenters, American Symphony Orchestra League, Dance/USA,
OPERA America, and Theatre Communications Group, supported
by The Pew Charitable Trusts

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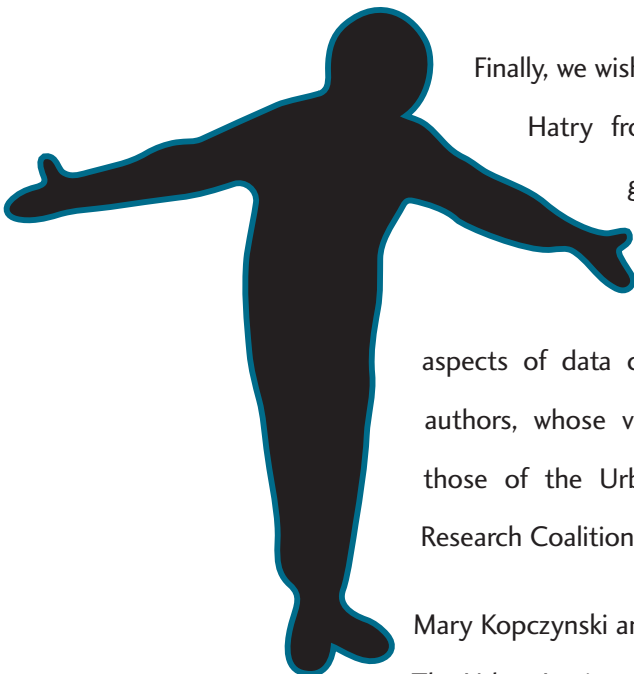
Acknowledgments

The authors of this report are grateful to Marian Godfrey and Shelley Feist of The Pew Charitable Trusts for their generous and enthusiastic support of this effort.

We are also grateful for the leadership provided by the Performing Arts Research Coalition and its participants: Marc Scorca and Donald Delauter from OPERA America; Charles “Chuck” Olton, Jack McAuliffe, and Jan Wilson from the American Symphony Orchestra League; Sandra Gibson from the Association of Performing Arts Presenters; Andrea Snyder and John Munger from Dance/USA; and Ben Cameron, Chris Shuff, and Joan Channick from Theatre Communications Group. We offer our special thanks to Mary McIntosh at Princeton Survey Research Associates International for managing data collection for the PARC household surveys.

Finally, we wish to thank Elizabeth Boris and Harry Hatry from the Urban Institute for their guidance throughout the project, and Erica Lagerson for her assistance in managing key aspects of data collection. Errors are those of the authors, whose views do not necessarily represent those of the Urban Institute, the Performing Arts Research Coalition, or The Pew Charitable Trusts.

Mary Kopczynski and Mark Hager
The Urban Institute



ABOUT THE PARC PROJECT

The Performing Arts Research Coalition (PARC) brings together five major national service organizations (NSOs) in the performing arts—the American Symphony Orchestra League, the Association of Performing Arts Presenters, Dance/USA, OPERA America, and Theatre Communications Group—to improve and coordinate the way performing arts organizations gather information on their sector.

This unprecedented collaborative effort is coordinated by OPERA America and supported by a three-year, \$2.7 million grant to OPERA America from The Pew Charitable Trusts.

Working with the Urban Institute, a leading nonprofit research organization in Washington, D.C., the project is collecting data in 10 pilot communities: Alaska, Cincinnati, Denver, Pittsburgh, Seattle, Austin, Boston, Minneapolis–St. Paul, Sarasota, and Washington, D.C.

Information is being gathered on administrative expenditures and revenues of performing arts organizations, the value of the performing arts as experienced by both attenders and nonattenders of arts events, and audience and subscriber satisfaction with performances and related activities.

The findings from these various research activities are expected to help performing arts organizations across the country improve their management capacity, strengthen their cross-disciplinary collaboration, increase their responsiveness to their communities, and strengthen local and national advocacy efforts on behalf of American arts and culture.

Research findings will be available each year of the initiative, and a summary analysis will be released in 2004. The national service organizations are regularly sharing findings with their members, policymakers, and the press, indicating how this information could be used to increase participation in and support for the arts, locally and nationally.

For further information, please contact: OPERA America at (202) 293-4466.

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Foreword

The Performing Arts Research Coalition is providing Sarasota and Manatee counties with a unique opportunity to assess their communities' attendance habits and attitudes regarding the performing arts.

Sarasota is the smallest of the cities chosen for the PARC project, but it is significant in its rich cultural tradition. With a local population in a two county area of only 600,000 to draw upon, there are numerous thriving performing arts organizations in all disciplines. Six of these participated in the project: Asolo Theatre Company, Florida Studio Theatre, Florida West Coast Symphony Orchestra, Sarasota Opera, Van Wezel Performing Arts Hall, and Venice Symphony.

Some surprising findings from our surveys include the fact that there is very little relationship between age and attendance level, and that those respondents with children at home are just as likely as those without children to attend performances. We were delighted to discover that more than two-thirds of the respondents believe strongly that the performing arts contribute to the education and development of children, and that a substantial proportion of respondents feel positively about the role of the arts in this community, whether or not they attend performances themselves.

The opportunity to participate in the PARC project drew the six organizations together in a communal effort and fostered improved communication among them. Once the data from the audience and subscriber surveys had been distributed to the individual organizations, the group decided to combine their data for a more global overview and share it among all the members.

The training provided by the project will make it possible for the participating organizations to continue meaningful surveys in the future. This core group will also be able to assist smaller organizations in creating and executing surveys and interpreting data. All of the arts organizations in Sarasota will benefit from the findings of the project and the increased awareness of the high value this community places on the arts.

Linda DiGabriele, Asolo Theatre
On behalf of the Sarasota PARC Working Group

Preface

The Performing Arts Research Coalition—PARC—provides a historic opportunity for five national service organizations to work together in an unprecedented three-year project to measure the level of participation in and support for the arts in 10 communities across the country.

A second set of findings from this project—the results of household surveys conducted in the metropolitan areas of Austin, Boston, Minneapolis–St. Paul, Sarasota, and Washington, D.C.—are now available. They enable us to draw a detailed picture of the value of the performing arts to individuals and their communities, and to offer a greater understanding of the perceived obstacles to greater attendance.

The findings are extremely encouraging. They reveal an arts audience far larger and more diverse than currently believed, comparable in size to audiences for sports. Support for the performing arts also appears to be broad, with far-reaching cultural, social, and educational implications. Attendance at arts events, for example, was perceived by attenders and nonattenders alike to be of significant value to communities, and especially important to the development and education of children. Several attendance barriers cited were primarily perceptual; for example, potential audiences did not fully appreciate the ease of attending performances and the accessibility of the arts experience.

Such information should be useful to a variety of stakeholders, including policymakers evaluating the role of government in supporting the arts; funders needing hard data on which to base and increase their financial support of the arts; media seeking a wider consumer base; and managers of arts organizations tackling the twin challenges of increasing and diversifying their audiences.

The size and breadth of the performing arts audience also suggest an appetite for expanded arts coverage in newspapers, radio, and television, and that arts coverage should perhaps be considered in broader terms than performance reviews. Grantmakers may be interested in placing their arts support in the larger context of the range of civic benefits that derive from arts attendance.

Local initiatives that improve parking and reduce perceived and real obstacles to convenience and safety could have a significant impact on the size of the arts audience and frequency of attendance, particularly if such efforts are combined with communication strategies that introduce more people to the arts experience.

We invite you to review on the following pages these common threads and to reflect on the vibrant picture they paint of the high levels of participation in and appreciation for the performing arts in these five communities. In closing, PARC wishes to convey how indebted the coalition is to the generous support of The Pew Charitable Trusts and to the outstanding service of the Urban Institute in designing and administering this project.

Marc A. Scorca
OPERA America President and CEO
PARC Project Coordinator

Highlights from Five Communities

Following are the key findings from the five household surveys conducted in the metropolitan areas of Austin, Boston, Minneapolis–St. Paul, Sarasota, and Washington, D.C. The findings cover participation rates, characteristics of attenders, perceived value of the performing arts to individuals and to communities, and barriers to greater attendance.

PARTICIPATION RATES

The research indicates that attendance at live professional performing arts events, at least on an occasional basis, is an activity enjoyed by a significant majority of adults in the five communities studied. The notion that the performing arts only appeal to a narrow segment of the general public does not appear to be accurate.

- **Attendance Levels:** Approximately three-quarters of respondents reported attending a live professional performing arts event in the past 12 months. These numbers range from 78 percent (in the Boston metro area) to 71 percent (in Sarasota-Manatee). Frequent attenders, defined as those who attended at least 12 performances over the past year, range from 17 percent of respondents (in the Washington, D.C. metro area) to 11 percent (in the Minneapolis–St. Paul metro area).
- **Arts vs. Sporting Events:** In all five communities, more people have attended a live performing arts event at least once in the past year than have attended a professional sporting event. However, arts attenders are active citizens who participate in a wide range of activities and volunteer for organizations in their community.
- **Performing Arts and Leisure Activities:** The research confirms that frequent performing arts attenders are also the most frequent attenders of other leisure activities, including sporting events, movies, festivals, museums, and popular concerts. Attenders were generally more involved with these activities than nonattenders of performing arts events. Rather than

an “arts” versus “other activities” distinction, the findings suggest that people generally are either involved in community activities (be it attendance at performing arts activities or otherwise) or they are not.

- **Performing Arts and Volunteering:** In all five communities, arts attenders and frequent arts attenders are considerably more likely to volunteer than are nonattenders—not just for arts organizations, but generally in their communities. Although there is clear evidence to support this relationship, the data cannot be used to suggest that attendance at performing arts results in higher levels of volunteerism. Nonetheless, arts attenders display characteristics that are conducive to greater civic engagement and stronger communities.

CHARACTERISTICS OF ATTENDERS

The arts audience is diverse. It includes people from all age groups and income levels, and is not limited, as is commonly believed, to older and affluent individuals.

- **Age and Attendance:** The most noteworthy finding from the surveys is the lack of a strong relationship between age and level of attendance.
- **Household Income and Attendance:** Nonattenders show a trend toward lower incomes and frequent attenders show a trend toward higher incomes. The finding is stronger in some communities than in others, and is weakest in Austin where respondents from the lowest income households are as likely to be frequent attenders as respondents from highest income households.
- **Education and Attendance:** There is a strong relationship between education level and category of attendance. That is, as education level increases, so also does the percentage of respondents who are attenders or frequent attenders.

VALUE OF THE PERFORMING ARTS TO THE INDIVIDUAL

The research indicates clearly that arts attenders place a very high value on the role of the arts in their lives in terms of enjoyment, their understanding of themselves and other cultures, creativity, and connection to their communities. This holds true across age groups, income levels, and the presence or absence of children at home.

- **Offers Enjoyment:** A strong majority of respondents have strong opinions about the level of enjoyment derived from live performing arts. More than 80 percent of respondents strongly agree or agree that the arts are enjoyable.
- **Factors Related to Enjoyment:** As level of education increases, so does the percentage of respondents who strongly agree with the statement that attending live performances is enjoyable. Enjoyment is unrelated to household income level, except in Sarasota where higher household incomes are associated with greater levels of arts enjoyment.

- **Factors Unrelated to Enjoyment:** Age and the presence of children at home are largely unrelated to the degree to which respondents find live performing arts to be enjoyable.
- **Stimulates Critical Thinking:** In all cities, more than three-quarters of respondents also strongly agree or agree that attending live performing arts is thought provoking.
- **Factors Related to Critical Thinking:** The strong belief that the performing arts are thought provoking does not differ substantially by household income level, age, or the presence of children in the home. However, consistent with expectations, this belief is held most commonly by frequent attenders and least commonly by nonattenders.
- **Increases Cultural Understanding:** Respondents in each of the five communities have similar views regarding the extent to which live performing arts help them better understand other cultures. Overall, between 70 percent (in the Minneapolis–St. Paul metro area) and 79 percent (in the Washington, D.C. metro area) of respondents strongly agree or agree with this statement. This strong level of agreement holds regardless of education, income, age, or whether or not there are children at home.
- **Encourages Creativity:** More than 60 percent of respondents in each community strongly agree or agree that attending live performing arts encourages them to be more creative. Education level and household income (except in greater Austin) play little role in whether one feels strongly that attending live performing arts encourages higher levels of creativity. However, younger respondents are more inclined to agree than are older respondents that attending live performing arts encourages them to be more creative.

VALUE OF PERFORMING ARTS TO COMMUNITIES

Attenders place an even greater value on the arts in their communities than they do in their own lives. They believe strongly that the arts *improve the quality of life* and are a *source of community pride*, *promote understanding of other people and different ways of life*, *help preserve and share cultural heritage*, *provide opportunities to socialize*, and *contribute to lifelong learning in adults*. Above all, they believe that the arts *contribute to the education and development of children*. Especially noteworthy is the fact that many nonattenders also share similar views.

- **Individual vs. Community Value:** The percentage of respondents with positive opinions about the value of the arts to their community is even higher than that reported in the preceding section. This suggests that people place a higher value on the arts in their communities than they place on the value of the performing arts in their own lives. Combining the percentages of respondents who strongly agree and agree with each of these statements, more than three-quarters are in agreement, in every community, with every statement in the survey about community values.

- **Value to Children:** At least 9 out of 10 respondents in each of the five communities either strongly agree or agree that the performing arts contribute to the education and development of children. These opinions about the contributions made by the performing arts to the education and development of children are held consistently, regardless of education level, income, age, presence of children, or frequency of attendance.
- **Increased Quality of Life:** More than 8 out of 10 respondents strongly agree or agree that the performing arts improve the quality of life in their community.
- **Preserves Cultural Heritage:** At least 9 out of 10 respondents in each of the five communities strongly agree or agree with the statement that the arts help preserve and share cultural heritage. Among these respondents, the research finds no relationship between this belief and education level, income level, or the presence of children at home. Even nonattenders strongly agree or agree with this statement in relatively large numbers.
- **Strengthens Local Economy:** The percentage of respondents who strongly agree or agree that the performing arts contribute to the local economy is slightly lower than for other community values considered in this study. However, the percentage of respondents that strongly agree is considerably lower than for most of the other community values.

BARRIERS TO ATTENDANCE

There are, of course, barriers to arts attendance among nonattenders and barriers to more frequent attendance among those who already attend arts performances. What is particularly interesting is that, despite what some might suspect, the cost of tickets is not the leading barrier.

- **Key Barriers:** Of the 11 barriers suggested in the survey, only *prefer to spend leisure time in other ways* and *hard to make time to go out* are cited by a majority of respondents in all five communities as a big or moderate reason. *Cost of tickets* is cited by a majority in all communities except Sarasota-Manatee, and *difficulty or cost of getting to or parking at events* is a big or moderate issue for a majority of respondents in Austin and Boston. *Cost of tickets* ranks second or third across the sites, never first.
- **Prefer Spending Time Elsewhere:** Between one-quarter and one-third of respondents in each community indicate that their *preference to spend leisure time in other ways* is a big reason why they do not attend more performing arts events. The preference to spend leisure time in other ways is the factor that most clearly differentiates attenders from nonattenders in all five communities.

- **Difficulty Finding Time:** Interestingly, attenders and frequent attenders are almost as likely as nonattenders to say that *hard to make time to go out* is a substantial barrier. The main variable that makes this a big factor for more people is the presence or absence of children in the home.
- **Cost of Tickets:** The cost of tickets is the only “big” barrier that attenders cite more often than nonattenders or frequent attenders. Especially noteworthy is the fact that *cost of tickets* as a barrier to performing arts attendance is substantially unrelated to education level, age, or whether there are children in the home.

The research makes clear that attenders and frequent attenders share the same concerns about limited time and the cost of tickets with nonattenders. Yet the first two groups find attendance at the arts sufficiently rewarding to overcome these obstacles. Artists and arts organizations have the challenge of offering performances of sufficient quality, supported by strong customer service and community programs, to help potential attenders and frequent attenders overcome these barriers.

Other obstacles cited less often by attenders and nonattenders also offer arts organizations an opportunity to build audiences by overcoming barriers of perception.

- **Lack of Appeal:** The statement that the *performing arts do not appeal* is cited as a big barrier by between 6 and 12 percent of respondents in the five communities. This barrier clearly is tied to education level and, as might be expected, clearly differentiates attenders from nonattenders. Performing arts organizations might consider increasing community programs and adult education activities that could help build an interest in the arts among nonattenders.
- **Feel Out of Place:** A number of nonattenders said they *feel uncomfortable or out of place at performing arts events*, although fewer people cite this as a big barrier, and the relationship with education is much weaker in all communities. Performing arts organizations might wish to examine the way audiences are greeted and made to feel welcome upon entering the theater and before performances, during intermissions, and at the conclusion of the event.

An additional barrier is the *difficulty or cost of getting to or parking at events*, which varies in importance by community. This particular obstacle could be addressed by arts organizations if they are in a position to make special parking arrangements for their audiences. Similarly, the belief that *performances are in unsafe or unfamiliar locations* could be mitigated by improved lighting, more visible security, and general awareness of the needs of the audience beyond the final applause.

Sarasota/Manatee Household Survey Findings

From October to December of 2002, 801 residents from Sarasota and Manatee counties responded to a telephone household survey designed by the Urban Institute in collaboration with PARC to elicit information about the frequency and pattern of their attendance at live performing arts events. The survey also probed their attitudes toward the value of the performing arts to their personal lives and to their community. This report provides the key findings from that survey.

Findings from the survey should interest participating members of the performing arts collaborative, local businesses, government officials, and residents of Sarasota and Manatee counties. By using this information, arts organizations will be better positioned to enhance their leadership role in the community and nationally. They also may find the information helpful in efforts to improve their organizational management and identify opportunities for greater participation of individuals in performing arts activities.

HOW THE REPORT IS ORGANIZED

The report provides a snapshot of the level of attendance at and appreciation for the performing arts in the Sarasota/Manatee area. It is organized around four key topics:

- **Attendance at Performing Arts Events:** How often do residents attend live performing arts events? Does frequency differ by income, age, education, the presence of children in the household, or voting behavior?
- **Perceived Value of the Performing Arts to Individuals:** What do the residents think about the value of the performing arts in their own lives? Do attitudes vary by such characteristics as age and income?

- ***Perceived Value of the Performing Arts to the Community:*** What are residents' attitudes about the value of the performing arts to the community as a whole? Do attitudes reflect income, education, or age characteristics?
- ***Barriers to Participation:*** What do residents think are the biggest obstacles to greater attendance at performing arts events?

The information from the survey, which provides answers to these and other similar questions, is presented in tabular form with accompanying explanatory text. The tables provide the basic information from which the reader can make any number of inferences, depending on the interests of the organization or individual reviewing the information. The text notes the most striking findings in each table and is designed to enable a reader to review the survey results quickly and easily.

A statistic called Somer's d is used in a number of tables to show the relationship between two variables. Somer's d values of less than -0.15 or higher than $+0.15$ are worth your attention, while values closer to zero indicate a weak or even nonexistent relationship between variables. For a full discussion of Somer's d values, please see page 54 in the section on methodology.

CHARACTERISTICS OF SARASOTA RESPONDENTS

The information in this report is based on a survey of 448 residents from Sarasota county and 353 residents from Manatee county. The respondents reflect the diverse education levels, household incomes, ages, and household compositions of the community. This diversity enables us to compare reported attitudes and behaviors of respondents by these characteristics. The

PARC PARTNERS IN SARASOTA

- Asolo Theatre Company
- Florida Studio Theatre
- Florida West Coast Symphony Orchestra
- Sarasota Opera
- Van Wezel Performing Arts Hall
- Venice Symphony

result is a complex and nuanced picture of who attends live performing arts events, who does not, the value they place on such performances, and the barriers they perceive to greater attendance. The following five tables show how these major characteristics are distributed among survey respondents.

Two cautions: first, a substantial number of respondents chose not to report their household income level. In the tables where we look at breakdowns by income, we include only those respondents who reported their income. Second, because of the relatively small numbers of respondents in the sample who completed only elementary school, who are under the age of 25, and those who vote only once in a while or about half of the time, readers should be careful not to draw major conclusions about these groups of respondents.

The respondents are 86 percent white, 5 percent black, 5 percent Hispanic/Latino, 1 percent Asian/Pacific Islander, and 1 American Indian or Alaskan Native. Two percent of respondents did not report their race/ethnicity.



HIGHEST LEVEL OF EDUCATION COMPLETED

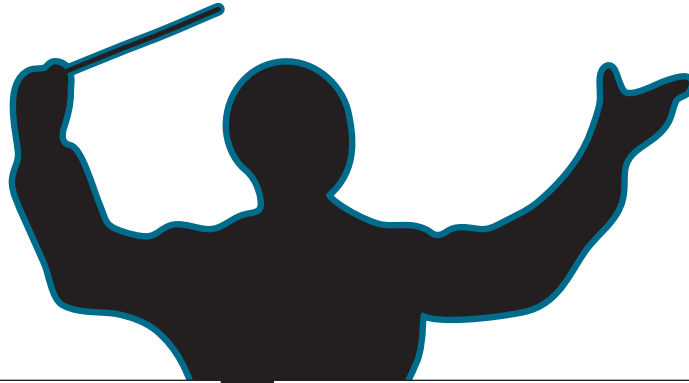
	Number of Respondents	Percentage
Elementary school	48	6%
High School or GED	214	27%
Junior college or tech school	227	28%
Four-year college or university	185	23%
Post-graduate degree	122	15%
Did not report	5	1%
Total	801	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

TOTAL HOUSEHOLD INCOME

	Number of Respondents	Percentage
Less than \$25,000	112	14%
\$25,000 to under \$50,000	193	24%
\$50,000 to under \$100,000	194	24%
\$100,000 or more	109	14%
Did not report	193	24%
Total	801	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.



AGE

	Number of Respondents	Percentage
Under 25	57	7%
25-34	91	11%
35-44	144	18%
45-54	143	18%
55-64	133	17%
65 and over	215	27%
Did not report	18	2%
Total	801	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

HOW OFTEN WOULD YOU SAY YOU VOTE?

	Number of Respondents	Percentage
Never	93	12%
Once in awhile	59	7%
About half the time	48	6%
Most of the time	170	21%
Always	421	53%
Did not report	10	1%
Total	801	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

CHILDREN IN THE HOUSEHOLD

	Number of Respondents	Percentage
No children at home	542	68%
Children under 13 years of age	198	25%
Children 13 years and older	118	15%
Did not report	5	1%

Total does not equal 100% because some families have children both under and over the age of 13.

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

Percentage totals in this report may not always add to 100 percent because of rounding.

Attendance

Attendance is the most common measure of how much people value the performing arts. This section focuses on attendance, but also considers related behaviors such as listening to recorded media, watching performances on public television, and participating personally in performing arts activities.

To gauge respondents' attendance levels, we asked them about their attendance at a variety of live, professional performing arts events in the past year. Respondents were instructed to exclude attendance at elementary, middle, or high school productions. For example, we asked people how many times they had attended a live, professional dance performance such as ballet, modern/contemporary, or a culturally specific dance performance in the past 12 months. We asked similar questions about attendance at opera, theatre, and symphony performances.

We also included a catchall "other discipline" category. The examples given to respondents for this category were chamber music, jazz, folk or traditional arts, and festivals. This category is meant to include the full range of performing arts activities that respondents could not group under dance, opera, theatre, or symphony.

HIGHLIGHTS

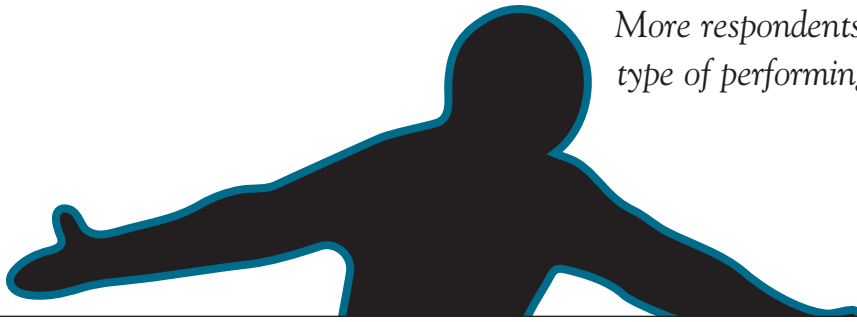
Attendance Levels Vary: Seven out of ten respondents went to a live, professional performing arts presentation last year. Of those, one in five were frequent attenders, meaning they attended 12 or more performances.

Education and Income Matter: People with higher levels of education and those in higher income households are more likely to attend performing arts events.

Age Is Not a Factor: Attendance levels do not vary substantially by age category.

Participation Takes Several Forms: Frequent attenders are more likely to enjoy recorded presentations and to be personally involved in the performing arts by playing music, singing, or otherwise performing their own art. However, a substantial number of nonattenders also participate in these ways.

Frequent Attenders Do More Than Just Attend Live Arts Events: Frequent performing arts attenders are also more frequent attenders of such activities as the movies, sporting events, and pop/rock concerts. This suggests that attenders are better characterized as “generally involved” rather than “arts lovers.”



More respondents attended theater than any other type of performing arts event.

TABLE 2.1

ATTENDANCE AT LIVE PERFORMING ARTS EVENTS IN THE PAST 12 MONTHS, BY DISCIPLINE

Discipline	Percent Attending At Least One Performance	Average Number of Performances (nonattenders included)	Average Number of Performances (discipline attenders only)*
Dance	37%	1.3	3.5
Opera	11 %	0.2	2.2
Theatre	53%	2.1	3.9
Symphony	29%	1.1	3.7
Other	42%	1.6	3.9
Any Discipline	71 %	6.2	8.8

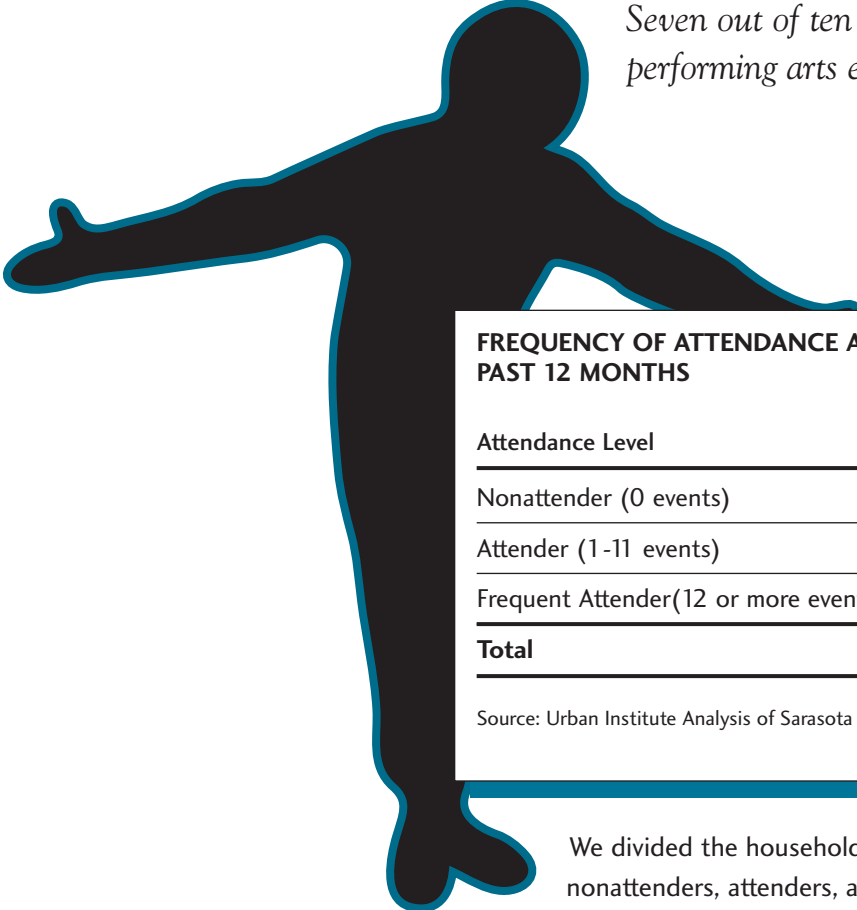
Source: Urban Institute Analysis of Sarasota Household Data, 2002.

More than half of respondents said they had been to a live professional play or musical in the past 12 months. The discipline that captures the smallest percentage of the general population is opera, with 11 percent of respondents attending in the past year.

Including the 47 percent of respondents who did not go to a play or musical in the past year, the average respondent went 2.1 times. In contrast the average respondent attended less than one (0.2) opera performance last year. While comparatively fewer people in Sarasota/Manatee attend opera, those who do attend say that they saw on average about two operas (2.2) last year. Attenders of dance, theatre, symphony, and “other” live performing arts performances attend, on average, about the same number of times per year, ranging from 3.5 to 3.9 performances.

Seventy-one percent of respondents reported attending at least one performing arts event in the past 12 months. This leaves 29 percent of respondents that we refer to as “nonattenders.”

* This column shows average attendance for respondents who say they have attended a particular type of performance (for example, dance), while the middle column shows averages that also include respondents who have not attended.



Seven out of ten respondents attended a live performing arts event in the past year.

TABLE 2.2

FREQUENCY OF ATTENDANCE AT LIVE PERFORMING ARTS EVENTS IN PAST 12 MONTHS

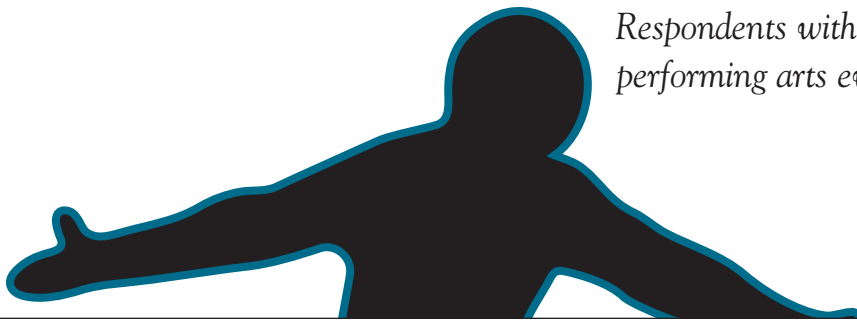
Attendance Level	Number	Percentage
Nonattender (0 events)	236	29%
Attender (1-11 events)	445	56%
Frequent Attender(12 or more events)	120	15%
Total	801	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

We divided the household survey respondents into three groups: nonattenders, attenders, and frequent attenders. These distinctions are important, because we expect that the way people feel about the performing arts and about the factors that keep them from attending performances more often will be related to their frequency of attendance. Thus, in the remainder of this section and in the sections to come, we report differences among these three categories of performing arts attenders.

One in five respondents who attend performing arts events went to 12 or more events in the past year. More than half of all respondents say they attend arts events, but less frequently than once a month. Our meetings with community working groups from the first year indicate that breaking out the middle (attender) category would provide useful distinctions for performing arts managers. Future research should take a closer look at differences between people who attend one to three times a year and those who attend more frequently.

Several contemporary studies of arts attendance have discussed differences among nonattenders, infrequent or moderate attenders, and frequent attenders. However, these discussions are usually not faced with the difficulty of defining what number of performances differentiates one category of attender from another. In this study, we place the break between attenders and frequent attenders at 12 performances.



Respondents with more education attend live performing arts events more often.

TABLE 2.3

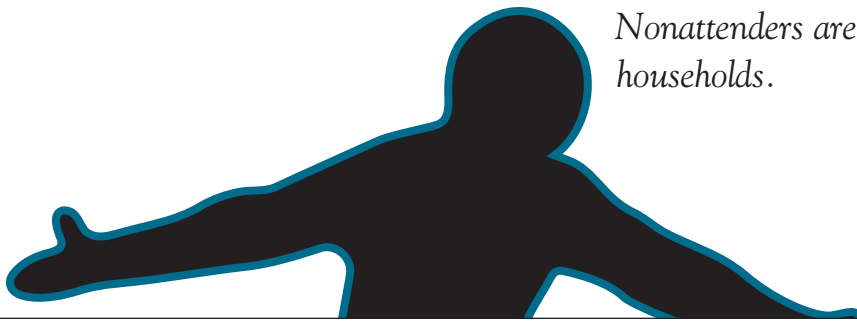
FREQUENCY OF ATTENDANCE AT LIVE PERFORMING ARTS EVENTS IN PAST 12 MONTHS, BY EDUCATION

Attendance Level	All	Elementary School	High School or GED	Junior College or Tech School	Four-year College or University	Post-graduate
Nonattender	29%	60%	41%	29%	20%	13%
Attender	56%	38%	50%	57%	62%	60%
Frequent Attender	15%	2%	9%	14%	18%	27%
Total	100%	100%	100%	100%	100%	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

Education level is positively related to attendance level. Among respondents whose highest level of completed education is high school or less, a substantial number did not attend a performing arts event in the past 12 months. The percentage of nonattenders decreases steadily as level of education increases. Among the most educated, only 13 percent are nonattenders. The opposite trend is evident when looking at frequent attenders. Among the least educated, only 2 percent are frequent attenders. Conversely, 27 percent of the most educated fall into the frequent attender category.

As described in the methodology section at the end of the report, a measure of association called Somer's d can give us an indication of the strength of the relationship between two variables. The value of Somer's d for education level and the three categories of attendance is +0.22. The positive sign tells us that there is an overall association between higher education level and higher level of attendance in the performing arts. The magnitude of the statistic (0.22) is worth paying attention to because it exceeds our guideline of 0.15 and above for noting the presence of a relationship between two variables. Thus, we conclude that education level is positively associated with attendance level.



Nonattenders are concentrated in lower income households.

TABLE 2.4

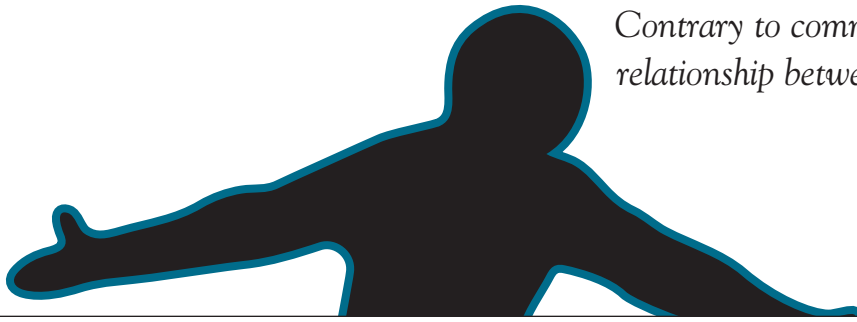
FREQUENCY OF ATTENDANCE AT LIVE PERFORMING ARTS EVENTS IN PAST 12 MONTHS, BY HOUSEHOLD INCOME

Attendance Level	All	Less than \$25,000	\$25,000 to under \$50,000	\$50,000 to under \$100,000	\$100,000 or More
Nonattender	29%	47%	34%	24%	12%
Attender	56%	45%	55%	59%	61%
Frequent Attender	15%	8%	11%	17%	27%
Total	100%	100%	100%	100%	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

People in higher income households attend the performing arts more often than people from lower income households. About one in four respondents from households with incomes greater than \$100,000 are frequent arts attenders, compared with about one in ten respondents from households with annual incomes under \$50,000.

The Somer's d value for the overall relationship between income and attendance is +0.21.



Contrary to common notions, there is very little relationship between age and attendance level.

TABLE 2.5

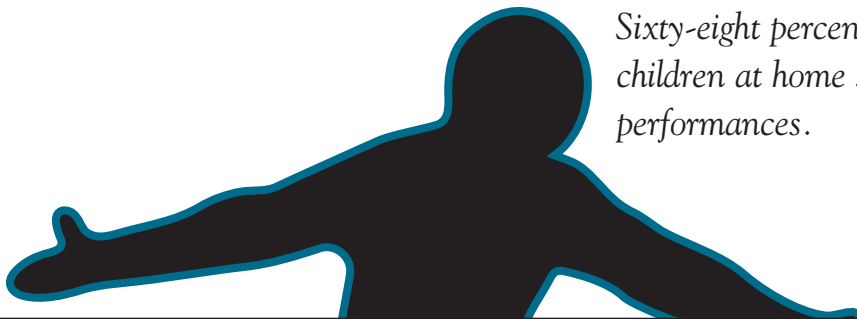
FREQUENCY OF ATTENDANCE AT LIVE PERFORMING ARTS EVENTS IN PAST 12 MONTHS, BY AGE

Attendance Level	All	Under 25	25-34	35-44	45-54	55-64	65 and Over
Nonattender	29%	37%	34%	26%	32%	29%	27%
Attender	56%	53%	59%	58%	57%	53%	52%
Frequent Attender	15%	10%	7%	17%	11%	17%	21%
Total	100%	100%	100%	100%	100%	100%	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

We observe a weak overall association between age and attendance at performing arts events. While the oldest residents of Sarasota/Manatee are more likely to be frequent attenders than its youngest residents, other differences between age categories are not pronounced. This observation calls into question the commonly held assumption that there is a “graying” of the audience for the performing arts.

A Somer's d value of +0.06 supports the conclusion that there is little relationship between age and attendance level.



Sixty-eight percent of respondents with young children at home still manage to attend live performances.

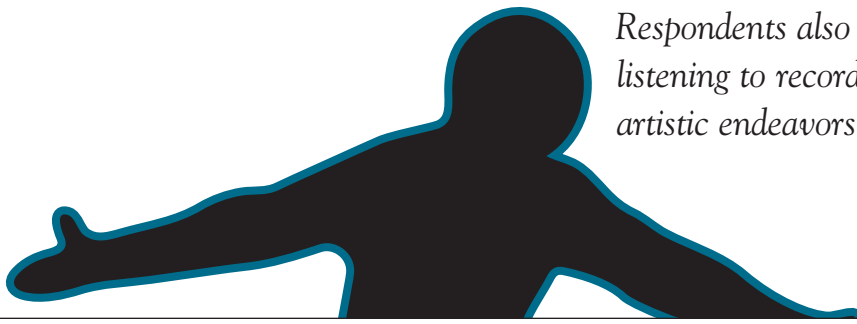
TABLE 2.6

**FREQUENCY OF ATTENDANCE AT LIVE PERFORMING ARTS EVENTS IN PAST 12 MONTHS,
BY CHILDREN IN HOME**

Attendance Level	All	No Children at Home	Children Under 13 Years of Age	Children 13 Years and Older
Nonattender	29%	30%	32%	25%
Attender	56%	53%	59%	63%
Frequent Attender	15%	17%	9%	12%
Total	100%	100%	100%	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

Respondents with children at home are just as likely as those without children to be performing arts attenders. Indeed, between two-thirds and three-quarters of these respondents are attenders or frequent attenders of the performing arts.



Respondents also experience the performing arts by listening to recordings and engaging personally in artistic endeavors.

TABLE 2.7

PERSONAL INVOLVEMENT IN ARTS-RELATED ACTIVITIES, BY FREQUENCY OF ATTENDANCE AT LIVE PERFORMING ARTS EVENTS

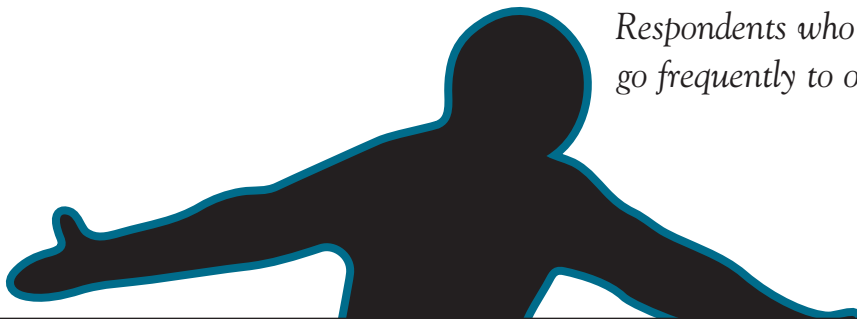
Activity	Percent Yes	Attendance Level		
		Nonattender	Attender	Frequent Attender
Listen to classical music on radio, CD	61%	44%	64%	84%
Watch performing arts on television	69%	44%	77%	88%
Play musical instrument	19%	11%	21%	29%
Sing in a choir or singing group	13%	9%	12%	27%
Perform or produce performing arts	17%	8%	16%	37%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

The majority of people in Sarasota/Manatee report listening to recordings of classical music at least a few times a year (61 percent) and watching the performing arts on television (69 percent). Not surprisingly, frequent performing arts attenders are more likely to extend their participation to these activities than are attenders. In turn, attenders are more likely to engage in such activities than are nonattenders. Even among nonattenders, recordings and television are substantial means by which Sarasotans enjoy the performing arts. More than two out of five (44 percent) of nonattenders listened to recorded classical music or watched a performing arts event on television in the past year.

Personal involvement in the arts, through playing musical instruments, singing, or performing or producing an arts event, is much more rare than is listening to recordings or watching television. However, these activities are also related to attendance and point to an alternate means by which nonattenders and attenders express their appreciation for the performing arts.

For each activity in this table, respondents were asked, "In general, over the last year, how often on average did you [insert activity]?" Response options were every day, at least once a week, at least once a month, occasionally, or never. Occasionally was defined to mean a few times a year. Percent "Yes" reflects the percentage of respondents who reported that they participated in each activity either occasionally, monthly, weekly, or daily.



Respondents who attend performing arts events also go frequently to other leisure events.

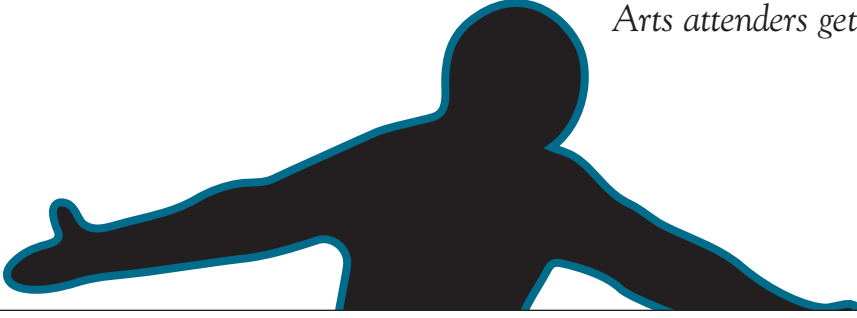
TABLE 2.8

**PERSONAL INVOLVEMENT IN OTHER LEISURE ACTIVITIES OVER THE PAST 12 MONTHS,
BY FREQUENCY OF ATTENDANCE AT LIVE PERFORMING ARTS EVENTS**

Activity	Percent Yes	Average Annual Attendance	Average Annual Attendance at Each Leisure Activity by Attendance Level		
			Nonattender	Attender	Frequent Attender
Go to movies	78%	7.5	3.8	8.1	12.8
Attend professional sporting event	43%	2.2	1.7	2.3	2.7
Attend amateur sporting event	29%	2.2	1.6	2.1	3.5
Attend live pop/rock concert	31%	1.1	0.5	1.0	2.4
Attend live comedy show	33%	0.6	0.3	0.6	1.3
Go to club to hear live music or dance	50%	4.8	2.8	5.0	8.0
Go to museum or art gallery	63%	2.7	1.0	2.6	6.5
Attend a community festival, parade, etc.	78%	3.2	2.0	3.3	5.2

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

Performing arts attenders go to nonperforming arts events more often than nonattenders, and frequent performing arts attenders go more often than attenders. These findings call into question the commonly held assumption that there is an arts/non-arts dichotomy, one that assumes a separation between those who attend the performing arts and those who attend sports, go to bars, or attend other social activities. The findings suggest that performing arts attenders are simply part of a more active segment of the Sarasota/Manatee community.



Arts attenders get to the polls more often.

TABLE 2.9

**FREQUENCY OF ATTENDANCE AT LIVE PERFORMING ARTS EVENTS IN THE PAST 12 MONTHS,
BY VOTING BEHAVIOR**

Attendance Level	Vote half the time or less	Vote always or most of the time	Total
Nonattender	36%	64%	100%
Attender	22%	78%	100%
Frequent Attender	15%	85%	100%
All survey respondents	25%	75%	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

The idea that performing arts attenders are part of a more active segment of the community extends to voting behavior. Only about two-thirds of nonattenders vote regularly, compared with more than three-quarters of attenders and frequent attenders. This finding provides another piece of evidence that arts participation is part of a larger dimension of engagement with the community.

Value to the Individual

This section reports survey answers to a series of questions designed to capture information about the respondents' *perceptions* of the value of the performing arts. These personal attitudes provide some clues about what motivates people to attend performing arts activities, including how these motivations might differ depending on education, income, age, and frequency of attendance at performing arts events.

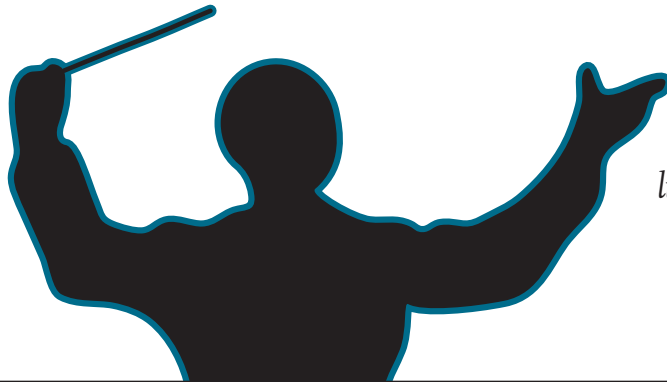


HIGHLIGHTS

Positive Attitudes Toward the Arts Predominate: The majority of respondents agree with positive statements in the survey about the role that the performing arts play in their lives. The statement that generated the most agreement is that the performing arts are *personally enjoyable* (85 percent). Somewhat fewer (63 percent) agree that the performing arts make them *feel more connected to the community*.

Attitudes Are Strong Regardless of Demographics: As education and household income levels increase, respondents were more likely to agree that the performing arts are *enjoyable*. However, on the whole, education, income, age, the presence of children at home, and voting behavior are largely unrelated to personal attitudes about the role of performing arts in respondents' lives.

Attendance Is Linked to Positive Attitudes: Overall, as attendance increases, so do positive attitudes toward the personal value of performing arts. Frequent attenders of the arts are most likely to strongly agree with all but one of the personal attitudes they were asked to consider.



Most respondents have positive attitudes about the value of performing arts in their lives.

TABLE 3.1

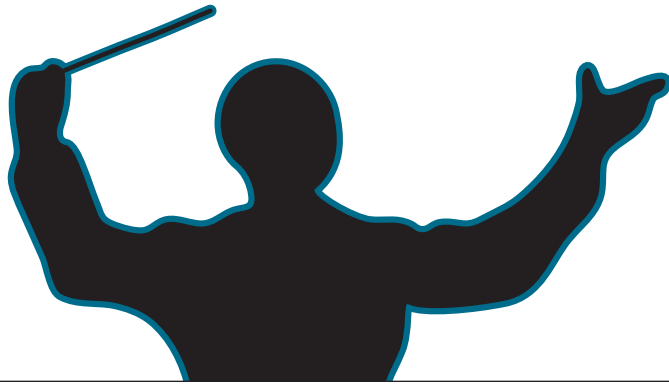
ATTITUDES TOWARD THE PERSONAL VALUE OF THE PERFORMING ARTS

Attending Live Performing Arts...	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree	No Response	Total
...is enjoyable to me	60%	25%	5%	4%	4%	3%	100%
...is thought provoking	43%	36%	6%	7%	4%	4%	100%
...helps me to understand other cultures better	37%	39%	9%	7%	5%	3%	100%
...is primarily a social occasion for me	37%	35%	9%	9%	7%	3%	100%
...encourages me to be more creative	31%	33%	12%	14%	8%	3%	100%
...makes me feel more connected to my community	28%	35%	13%	12%	9%	3%	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

On all measures of personal value, a majority of respondents registered positive sentiments about the performing arts. However, the level of agreement with positive statements differs across the six items. Over three-quarters of respondents strongly agree or agree that attending live performing arts is *enjoyable*, *thought provoking*, or *helps them to understand other cultures better*. Respondents were more ambivalent toward the role of the performing arts in *encouraging them to be more creative* or *making them feel more connected to community*.

The table on this page shows the distribution of responses for all survey respondents. For ease of presentation, the remaining tables in this section present data based on the percentage of respondents who strongly agree with each personal attitude.



Education level is largely unrelated to most personal attitudes about the performing arts.

TABLE 3.2

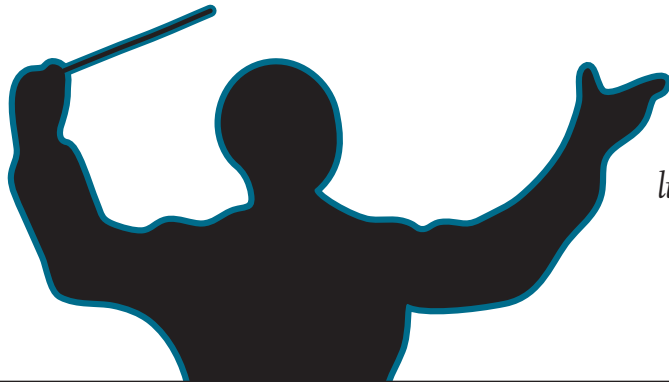
PERSONAL ATTITUDES BASED ON RESPONDENTS WHO STRONGLY AGREE WITH EACH STATEMENT, BY EDUCATION

Attending Live Performing Arts...	All	Elementary School	High School or GED	Junior College or Tech School	Four-year College or University	Post-graduate
...is enjoyable to me	60%	33%	49%	57%	69%	80%
...is thought provoking	43%	27%	42%	37%	48%	57%
...helps me to understand other cultures better	37%	35%	41%	32%	34%	46%
...is primarily a social occasion for me	37%	38%	36%	37%	34%	39%
...encourages me to be more creative	31%	35%	30%	25%	32%	40%
...makes me feel more connected to my community	28%	29%	25%	26%	29%	30%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

As education level increases, so does the percentage of respondents in each category who strongly agree with the statement that *attending live performing arts events is enjoyable*. We observe a similar, but weaker trend for the statement *attending live performing arts events is thought provoking*. For the other four statements, however, respondents do not differ substantially by education level.

The relationship between education level and *attending live performing arts is enjoyable to me* results in a Somer's d of +0.19; for the relationship between education level and *attending live performing arts is thought provoking*, Somer's d is +0.11.



Respondents from households with higher incomes are more likely to feel that attending live performing arts is enjoyable.

TABLE 3.3

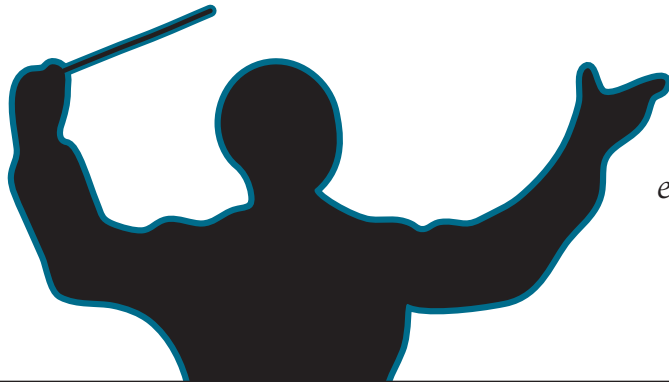
PERSONAL ATTITUDES BASED ON RESPONDENTS WHO STRONGLY AGREE WITH EACH STATEMENT, BY HOUSEHOLD INCOME

Attending Live Performing Arts...	All	Less than \$25,000	\$25,000 to under \$50,000	\$50,000 to under \$100,000	\$100,000 or More
...is enjoyable to me	60%	46%	57%	64%	74%
...is thought provoking	43%	41%	46%	45%	49%
...helps me to understand other cultures better	37%	39%	43%	31%	42%
...is primarily a social occasion for me	37%	37%	38%	29%	39%
...encourages me to be more creative	31%	31%	34%	34%	29%
...makes me feel more connected to my community	28%	30%	29%	23%	31%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

Although nearly half of respondents from the lowest income households say that performing arts are enjoyable to them, the likelihood of strongly agreeing with this statement rises markedly as household income rises. For the remaining five items, however, there is considerable similarity across all levels of income.

The Somer's d for the relationship between *attending live performing arts is enjoyable* and income level is +0.15.



Younger respondents are more likely to feel that attending live performing arts encourages them to be more creative.

TABLE 3.4

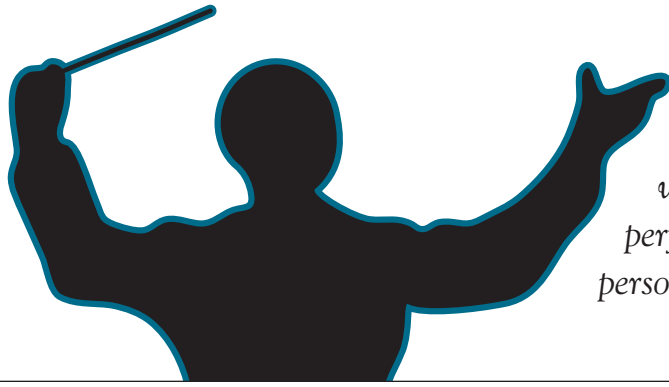
PERSONAL ATTITUDES BASED ON RESPONDENTS WHO STRONGLY AGREE WITH EACH STATEMENT, BY AGE

Attending Live Performing Arts...	All	Under 25	25-34	35-44	45-54	55-64	65 and Over
...is enjoyable to me	60%	53%	53%	63%	62%	61%	61%
...is thought provoking	43%	42%	48%	50%	43%	49%	35%
...helps me to understand other cultures better	37%	42%	43%	34%	41%	36%	34%
...is primarily a social occasion for me	37%	28%	31%	34%	32%	41%	42%
...encourages me to be more creative	31%	40%	40%	37%	38%	27%	19%
...makes me feel more connected to my community	28%	21%	26%	24%	28%	31%	30%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

As age increases, respondents are less likely to strongly agree that *attending live performing arts encourages creativity*. Respondents age 55 and over are somewhat more inclined to feel that attending live performing arts is *primarily a social occasion*. With the exception of the relationship between age and creativity, however, few strong patterns emerge between personal attitudes and age.

The Somer's d value for the relationship between age and *attending live performing arts encourages me to be more creative* is -0.18; for the relationship between age and *primarily a social occasion*, Somer's d only reaches +0.08.



While arts attenders have more positive attitudes than nonattenders, many of those who do not attend also strongly agree that the performing arts play a positive role in their personal lives.

TABLE 3.5

PERSONAL ATTITUDES BASED ON RESPONDENTS WHO STRONGLY AGREE WITH EACH STATEMENT, BY FREQUENCY OF ATTENDANCE AT LIVE PERFORMANCES

Attending Live Performing Arts...	All	Attendance Level		
		Nonattender	Attender	Frequent Attender
...is enjoyable to me	60%	37%	65%	86%
...is thought provoking	43%	34%	43%	64%
...helps me to understand other cultures better	37%	30%	38%	39%
...is primarily a social occasion for me	37%	31%	40%	35%
...encourages me to be more creative	31%	27%	28%	49%
...makes me feel more connected to my community	28%	20%	29%	39%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

As expected, agreement with each personal value statement tends to increase with frequency of attendance. An exception is for the statement that attending live performing arts is *primarily a social occasion for me*, where a smaller percentage of frequent attenders (35 percent) agree than attenders (40 percent).

Value to the Community

This section focuses on public perceptions of the value of the performing arts to residents of Sarasota and Manatee counties. It considers relationships between perceptions about the value of performing arts to the community and various respondent characteristics. We also briefly look at the two activities of volunteering for community organizations and making financial contributions to arts organizations to see if these behaviors vary by frequency of arts attendance.



HIGHLIGHTS

Value to the Community Is More Important than Value to the Individual: Respondents register noticeably more positive opinions about the value of the performing arts to their community than they do about the contribution of the arts to their own lives.

People Believe Arts Matter for Children: More than two-thirds of respondents strongly agree that performing arts *contribute to the education and development of children*. This very high agreement is consistent regardless of education, age, income, presence of children in the household, or voting behavior.

Community Engagement Patterns Vary: Volunteer patterns differ among nonattenders and frequent attenders. Only about half of nonattenders volunteered at least once during the past year, compared with more than 8 in 10 frequent attenders.

Giving Levels Are Low to Moderate: Overall, only one quarter of respondents made a financial contribution to a performing arts organization in 2001. However, about two-thirds of frequent attenders made a financial contribution.



Respondents agree more strongly about the contributions of the performing arts to their community than about the value of performing arts to themselves.

TABLE 4.1

ATTITUDES TOWARD PERFORMING ARTS IN COMMUNITY

Performing Arts...	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree	No Response	Total
...improve the quality of life in the greater Sarasota area	57%	30%	5%	2%	1%	4%	100%
...promote understanding of other people and different ways of life	45%	38%	8%	3%	2%	4%	100%
...provide opportunities to socialize with other people	56%	35%	3%	2%	1%	2%	100%
...are a source of pride for those in the greater Sarasota area	59%	32%	4%	2%	1%	3%	100%
...contribute to the education and development of children	68%	24%	2%	2%	1%	3%	100%
...contribute to lifelong learning for adults	51%	39%	5%	2%	1%	2%	100%
...help preserve and share cultural heritage	61%	31%	3%	2%	1%	2%	100%
...contribute to the economy of the greater Sarasota area	47%	36%	4%	4%	2%	7%	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

A very high percentage of respondents (between 83 and 92 percent) say they strongly agree or somewhat agree with each of the eight statements about community value that they were asked to evaluate. In contrast, agreement on the personal value items in the preceding section ranged from 63 to 85 percent.

The table on this page shows the distribution of responses for all survey respondents. For ease of presentation, the remaining tables in this section present data based on the percentage of respondents who strongly agree with each attitude.



As people acquire more education, they are more likely to believe that the performing arts improve the quality of life in the greater Sarasota area.

TABLE 4.2

ATTITUDES TOWARD PERFORMING ARTS IN COMMUNITY BASED ON RESPONDENTS WHO STRONGLY AGREE WITH EACH STATEMENT, BY EDUCATION

Performing Arts...	All	Elementary School	High School or GED	Junior College or Tech School	Four-year College or University	Post-graduate
...improve the quality of life in the greater Sarasota area	57%	37%	48%	54%	69%	72%
...promote understanding of other people and different ways of life	45%	29%	45%	40%	48%	57%
...provide opportunities to socialize with other people	56%	44%	55%	56%	51%	69%
...are a source of pride for those in the greater Sarasota area	59%	35%	52%	56%	66%	74%
...contribute to the education and development of children	68%	56%	63%	69%	69%	79%
...contribute to lifelong learning for adults	51%	29%	47%	45%	58%	68%
...help preserve and share cultural heritage	61%	38%	59%	60%	63%	71%
...contribute to the economy of the greater Sarasota area	47%	29%	47%	44%	52%	54%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

Respondents with higher levels of education are more likely to agree that performing arts *improve the quality of life* in Sarasota. The trends in this table also suggest that high levels of education are associated with stronger levels of agreement that the performing arts *contribute to lifelong learning for adults* and are a *source of pride* for local residents.

The Somer's d relationship between education level and the belief that performing arts *improve the quality of life* is +0.14; for *contribute to lifelong learning for adults*, Somer's d is +0.13, and for *source of pride*, Somer's d is +0.12.



Household income level plays a small role in the attitudes of Sarasota/Manatee residents toward the role of the performing arts in their community.

TABLE 4.3

ATTITUDES TOWARD PERFORMING ARTS IN COMMUNITY BASED ON RESPONDENTS WHO STRONGLY AGREE WITH EACH STATEMENT, BY HOUSEHOLD INCOME

Performing Arts...	All	Less than \$25,000	\$25,000 to under \$50,000	\$50,000 to under \$100,000	\$100,000 or More
...improve the quality of life in the greater Sarasota area	57%	47%	56%	63%	68%
...promote understanding of other people and different ways of life	45%	37%	48%	46%	59%
...provide opportunities to socialize with other people	56%	54%	60%	55%	61%
...are a source of pride for those in the greater Sarasota area	59%	49%	55%	61%	72%
...contribute to the education and development of children	68%	63%	74%	70%	77%
...contribute to lifelong learning for adults	51%	47%	49%	52%	61%
...help preserve and share cultural heritage	61%	65%	61%	63%	68%
...contribute to the economy of the greater Sarasota area	47%	37%	48%	54%	54%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

Household income level exhibits a weak but observable association with respondent perceptions of the value of the performing arts to community life in Sarasota and Manatee counties. The percentage trends in the table suggest that residents from lower income households are slightly less likely to strongly agree that performing arts *improve quality of life, are a source of pride, or contribute to the economy of the greater Sarasota area.*

The Somer's d for the relationship between community values and household income is not greater than plus or minus 0.05 for any of these questions.



People of different ages have notably similar attitudes about the role of the performing arts in their community.

TABLE 4.4

ATTITUDES TOWARD PERFORMING ARTS IN COMMUNITY BASED ON RESPONDENTS WHO STRONGLY AGREE WITH EACH STATEMENT, BY AGE

Performing Arts...	All	Under 25	25-34	35-44	45-54	55-64	65 and Over
...improve the quality of life in the greater Sarasota area	57%	35%	50%	61%	59%	62%	59%
...promote understanding of other people and different ways of life	45%	32%	47%	51%	52%	44%	39%
...provide opportunities to socialize with other people	56%	54%	57%	60%	57%	62%	49%
...are a source of pride for those in the greater Sarasota area	59%	35%	50%	60%	63%	67%	58%
...contribute to the education and development of children	68%	70%	69%	73%	71%	71%	62%
...contribute to lifelong learning for adults	51%	37%	49%	50%	55%	53%	53%
...help preserve and share cultural heritage	61%	65%	60%	62%	67%	63%	53%
...contribute to the economy of the greater Sarasota area	47%	44%	46%	56%	45%	47%	44%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

For several of these statements, respondents under the age of 25 are less likely to strongly agree. However, the small number of respondents in this category causes us to temper our claims about the youngest residents. On the whole, we conclude that age does not explain variation in attitudes about the contribution of the performing arts to the Sarasota/Manatee community.

A Somer's d of +0.08 for performing arts are a source of pride for those in the greater Sarasota area is the strongest relationship in this table.



More than two-thirds of respondents strongly agree that the performing arts contribute to the education and development of children.

TABLE 4.5

ATTITUDES TOWARD PERFORMING ARTS IN COMMUNITY BASED ON RESPONDENTS WHO STRONGLY AGREE WITH EACH STATEMENT, BY CHILDREN AT HOME

Performing Arts...	All	No Children At Home	Children Under 13 Years of Age	Children 13 Years and Older
...improve the quality of life in the greater Sarasota area	57%	60%	53%	56%
...promote understanding of other people and different ways of life	45%	43%	48%	45%
...provide opportunities to socialize with other people	56%	57%	54%	58%
...are a source of pride for those in the greater Sarasota area	59%	61%	53%	57%
...contribute to the education and development of children	68%	67%	73%	65%
...contribute to lifelong learning for adults	51%	53%	47%	47%
...help preserve and share cultural heritage	61%	60%	63%	60%
...contribute to the economy of the greater Sarasota area	47%	47%	49%	47%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

There is strong agreement about the contribution of performing arts to the education and development of children, regardless of education, income, age, or presence of children in the household. In general, very few differences are found among respondents from households with or without children. In most cases, respondents from households with young children feel equally strongly about these community values.



A substantial proportion of respondents who do not attend performing arts events feel positively about the role of the arts in their community.

TABLE 4.6

ATTITUDES TOWARD PERFORMING ARTS IN COMMUNITY BASED ON RESPONDENTS WHO STRONGLY AGREE WITH EACH STATEMENT, BY FREQUENCY OF ATTENDANCE

Performing Arts...	All	Attendance Level		
		Nonattender	Attender	Frequent Attender
...improve the quality of life in the greater Sarasota area	57%	39%	61%	80%
...promote understanding of other people and different ways of life	45%	34%	46%	63%
...provide opportunities to socialize with other people	56%	49%	55%	73%
...are a source of pride for those in the greater Sarasota area	59%	42%	62%	77%
...contribute to the education and development of children	68%	55%	71%	83%
...contribute to lifelong learning for adults	51%	36%	53%	75%
...help preserve and share cultural heritage	61%	50%	63%	75%
...contribute to the economy of the greater Sarasota area	47%	36%	48%	69%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

As we found in table 3.5, attenders have more favorable opinions about the performing arts than nonattenders, and frequent attenders have more favorable opinions than attenders. Though these relationships may be intuitive, the data offer strong evidence in support of these claims. Frequent attenders feel most strongly about the positive contributions of the performing arts to the *education and development of children* and *quality of life* in the greater Sarasota area.



Respondents who volunteer for community organizations are more likely to attend performing arts events.

TABLE 4.7

RESPONDENTS WHO VOLUNTEER IN THEIR COMMUNITY, BY FREQUENCY OF ATTENDANCE AT LIVE PERFORMING ARTS EVENTS

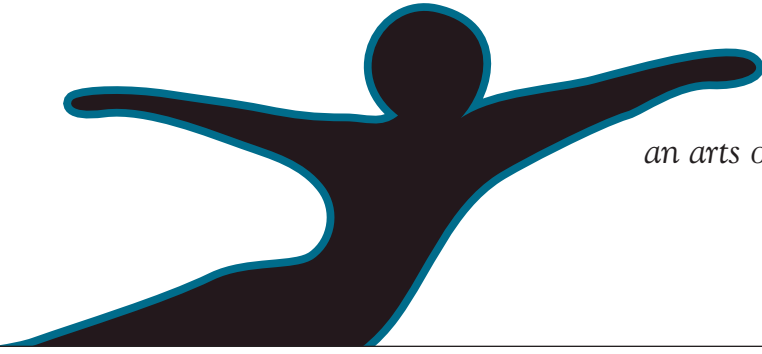
Attendance Level	Never Volunteer	Volunteer	Total
Nonattender	54%	46%	100%
Attender	31%	69%	100%
Frequent Attender	19%	81%	100%
All Respondents	36%	64%	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

Is the level of civic engagement of arts attenders similar to or different from that of nonattenders? The survey asked respondents how often they volunteer for charity, school, religious congregation, or community activities and whether they made a financial contribution to a performing arts organization.

There is a strong relationship between frequency of attendance at live performing arts events and volunteering in community organizations. Just under half of nonattenders reported that they volunteer at least once in a while. This contrasts with 7 in 10 attenders and 8 in 10 frequent attenders who say they volunteer. These findings are consistent with our earlier observation (table 2.8) that people who attend performing arts events are also active in a range of other activities outside their homes.

We make no causal inferences as to whether an individual is inclined toward volunteerism because of his or her attendance at performing arts events or whether volunteering inclines one to more frequent attendance at performing arts events.



*About two in three frequent
attenders made a donation to
an arts organization in 2001.*

TABLE 4.8

**RESPONDENTS WHO MADE A FINANCIAL CONTRIBUTION TO AN ARTS ORGANIZATION IN 2001,
BY FREQUENCY OF ATTENDANCE AT LIVE PERFORMING ARTS EVENTS**

Attendance Level	No Contribution in 2001	Contribution in 2001	Total
Nonattender	95%	5%	100%
Attender	76%	24%	100%
Frequent Attender	37%	63%	100%
All Respondents	75%	25%	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

One quarter of respondents reported that they made a financial contribution to an arts organization in 2001. However, the likelihood that someone made a contribution is influenced by whether the individual is an attender or not. Frequent attenders are substantially more likely to make a donation than nonattenders. However, even one out of three frequent attenders chose not to contribute.

Barriers to Attendance

This section focuses on factors that keep people from attending live performing arts events more frequently. For nonattenders, the questions can be taken to mean “Why don’t you attend?” For attenders, the questions can be taken to mean “What keeps you from attending even more?”

We consider a range of practical, personal, and perceptual obstacles to attendance. Some of these vary by respondent characteristics, such as education and income, and some help us understand the differences among nonattenders, attenders, and frequent attenders.



HIGHLIGHTS

Time, Leisure Preferences, and Cost Are Key Obstacles:

The biggest barriers to more frequent attendance at performing arts events, cited by about one in three respondents as a “big problem,” are *difficulty making time to go out*, *preference to spend leisure time in other ways*, and *cost of tickets*.

Demographic Characteristics Matter: People with lower levels of education are more likely to say that the *performing arts do not appeal* to them. People from lower-income households are more likely to say that *no one to attend with*, and *cost of tickets* are major barriers to attendance. Younger people are more likely to cite *family obligations*, *hard to make time to go out*, and *not enough information about performances and times*.

Nonattenders Prefer Doing Other Things: Nonattenders are more likely than attenders to say that they *prefer to spend leisure time in other ways* or that the *performing arts do not appeal* to them. They also report that they have *no one to attend with*, that they *feel uncomfortable or out of place at performing arts events*, that they *have not enjoyed past performances*, and that they have concerns about the *difficulty or cost of getting to or parking at events*.



Respondents say that it is hard to make time to go out is the biggest barrier to attendance.

TABLE 5.1

BARRIERS TO MORE FREQUENT ATTENDANCE AT LIVE PERFORMING ARTS EVENTS

Barrier	Big Reason	Moderate Reason	Small Reason	Not a Reason	No Response	Total
PRACTICAL						
Cost of tickets	27%	21%	7%	41%	4%	100%
Family obligations	17%	6%	4%	73%	0%	100%
Difficulty or cost of getting to or parking at events	10%	11%	8%	69%	2%	100%
Performances are in unsafe or unfamiliar locations	4%	6%	7%	80%	3%	100%
Not enough publicity or information about performances and times	12%	17%	10%	60%	2%	100%
PERSONAL						
Prefer to spend leisure time in other ways	30%	27%	13%	28%	2%	100%
Hard to make time to go out	42%	15%	8%	34%	1%	100%
No one to attend with	10%	8%	7%	74%	1%	100%
PERCEPTUAL						
Performing arts do not appeal	10%	10%	8%	71%	1%	100%
Feel uncomfortable or out of place at performing arts events	3%	5%	5%	86%	1%	100%
Have not enjoyed past performances	3%	5%	7%	82%	3%	100%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

For all but three items, most people said the various barriers are not a reason why they do not attend more. The three most frequently cited “big reasons” why people do not attend more performing arts events than they currently do are difficulty in *making time to go out*, a preference to *spend leisure time in other ways*, and the *cost of tickets*. However, as we report throughout this section, different people are affected by different barriers.

Researchers at the RAND Corporation reported conceptual work on barriers to greater arts attendance in a book entitled *A New Framework for Building Participation in the Arts*. They suggest that there are four distinct types of barriers, which they label *practical barriers*, *personal circumstances*, *perceptual barriers*, and *prior experiences*. We used the RAND framework to help in the development of our survey, but we depart from it in a two ways. First, we put our single question about prior experiences in with the perceptual barriers questions. Second, we add and subtract from the barriers developed in the RAND work.



Respondents with less education find the performing arts unappealing.

TABLE 5.2

RESPONDENTS REPORTING THAT AN ITEM IS A “BIG REASON” WHY THEY DO NOT ATTEND PERFORMING ARTS MORE, BY EDUCATION

Barrier	All	Elementary School	High School or GED	Junior College or Tech School	Four-year College or University	Post-graduate
PRACTICAL						
Cost of tickets	27%	33%	25%	27%	25%	30%
Family obligations	17%	17%	14%	19%	16%	19%
Difficulty or cost of getting to or parking at events	10%	19%	11%	10%	9%	9%
Performances are in unsafe or unfamiliar locations	4%	10%	6%	4%	3%	2%
Not enough publicity or information about performances and times	12%	21%	15%	10%	11%	5%
PERSONAL						
Prefer to spend leisure time in other ways	30%	31%	39%	32%	25%	21%
Hard to make time to go out	42%	29%	47%	45%	37%	41%
No one to attend with	10%	8%	14%	10%	9%	7%
PERCEPTUAL						
Performing arts do not appeal	10%	31%	14%	10%	6%	2%
Feel uncomfortable or out of place at performing arts events	3%	8%	5%	4%	1%	0%
Have not enjoyed past performances	3%	10%	3%	3%	3%	1%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

The value of Somer's d for the relationship between education level and *performing arts do not appeal* is -0.15 .

Almost one-third (31 percent) of respondents who have not completed high school say that the *performing arts do not appeal to them*. This proportion decreases as education increases. In fact, only two percent of respondents with a postgraduate degree say that the lack of appeal is a big reason why they do not attend more. Reactions to most of the barriers, however, do not vary much by education level.



Cost of tickets and no one to attend with are more prominent issues for less wealthy respondents.

TABLE 5.3

RESPONDENTS REPORTING THAT AN ITEM IS A “BIG REASON” WHY THEY DO NOT ATTEND PERFORMING ARTS MORE, BY HOUSEHOLD INCOME

Barrier	All	Less than \$25,000	\$25,000 to under \$50,000	\$50,000 to under \$100,000	\$100,000 or More
PRACTICAL					
Cost of tickets	27%	45%	29%	24%	13%
Family obligations	17%	11%	19%	17%	20%
Difficulty or cost of getting to or parking at events	10%	19%	8%	8%	7%
Performances are in unsafe or unfamiliar locations	4%	11%	5%	2%	4%
Not enough publicity or information about performances and times	12%	15%	12%	12%	10%
PERSONAL					
Prefer to spend leisure time in other ways	30%	35%	34%	26%	25%
Hard to make time to go out	42%	43%	47%	44%	41%
No one to attend with	10%	26%	13%	5%	5%
PERCEPTUAL					
Performing arts do not appeal	10%	20%	16%	6%	2%
Feel uncomfortable or out of place at performing arts events	3%	9%	4%	0%	1%
Have not enjoyed past performances	3%	7%	4%	3%	3%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

The value of Somer's d for the relationship between *no one to attend with* and *cost of tickets* and household income is -0.17 ; for *feel uncomfortable or out of place at performing arts events*, Somer's d is -0.09 ; for *difficulty or cost of getting to or parking at events* and *performances are in unsafe or unfamiliar locations*, Somer's d is -0.08 .

The percentage trends in this table suggest that household income level is related to several of the attendance barriers considered. Respondents with household incomes less than \$25,000 are considerably more likely to identify the following barriers to attendance: *cost of tickets*, *no one to attend with*, *difficulty or cost of getting to or parking at events*, *performances are in unsafe or unfamiliar locations*, and *feel uncomfortable or out of place at performing arts events*. The barrier *hard to make time to go out* is cited by more than two out of five respondents for each of the four levels of household income considered.



Younger respondents are more likely to cite time, family obligations, and lack of information as key barriers to attendance.

TABLE 5.4

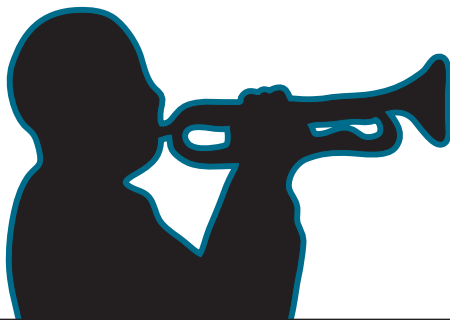
RESPONDENTS REPORTING THAT ITEM IS A “BIG REASON” WHY THEY DO NOT ATTEND PERFORMING ARTS MORE, BY AGE

Barrier	All	Under 25	25-34	35-44	45-54	55-64	65 and Over
PRACTICAL							
Cost of tickets	27%	17%	26%	32%	28%	29%	24%
Family obligations	17%	9%	29%	28%	19%	13%	6%
Difficulty or cost of getting to or parking at events	10%	2%	7%	6%	10%	5%	19%
Performances are in unsafe or unfamiliar locations	4%	5%	4%	0%	4%	3%	6%
Not enough publicity or information about performances and times	12%	25%	18%	14%	10%	12%	5%
PERSONAL							
Prefer to spend leisure time in other ways	30%	33%	26%	26%	34%	35%	28%
Hard to make time to go out	42%	42%	53%	56%	52%	40%	22%
No one to attend with	10%	3%	7%	8%	8%	11%	15%
PERCEPTUAL							
Performing arts do not appeal	10%	14%	13%	7%	8%	7%	13%
Feel uncomfortable or out of place at performing arts events	3%	5%	1%	3%	3%	2%	3%
Have not enjoyed past performances	3%	2%	9%	2%	4%	1%	2%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

The Somer's d value for the relationships between *not enough publicity or information about performances and times* and *family obligations* and age is -0.17 ; for *hard to make time to go out*, Somer's d is -0.18 . For *difficulty or cost of getting to or parking at events*, Somer's d only reaches $+0.09$.

The oldest respondents point to *difficulty or cost of getting to or parking at events* as an obstacle to more frequent attendance.



Having children at home keeps some respondents from getting out to performing arts events.

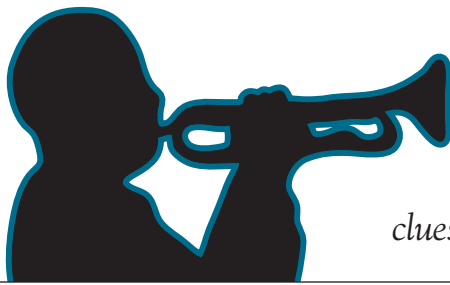
TABLE 5.5

RESPONDENTS REPORTING THAT AN ITEM IS A “BIG REASON” WHY THEY DO NOT ATTEND PERFORMING ARTS MORE, BY CHILDREN AT HOME

Barrier	All	No Children At Home	Children Under 13 Years of Age	Children 13 Years and Older
Family obligations	17%	7%	41%	32%
Hard to make time to go out	42%	36%	56%	54%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

This abbreviated table includes only the two items where we observe differences by presence of children in the household. Although we observed in table 2.6 little difference in attendance patterns between respondents with and without children, the table here shows that people with children at home are more likely to cite *family obligations* and *hard to make time to go out* as important reasons why they do not attend performing arts events more often. Respondents with young children are somewhat more likely to say that *family obligations* are a substantial obstacle. However, respondents with young children at home and those with teenage children are equally as likely to say that it is *hard to make time to go out*.



Respondents who do not attend the performing arts offer several reasons for not attending. Attenders give fewer clues for why they do not go more often.

TABLE 5.6

RESPONDENTS REPORTING THAT AN ITEM IS A “BIG REASON” WHY THEY DO NOT ATTEND PERFORMING ARTS MORE, BY FREQUENCY OF ATTENDANCE AT LIVE PERFORMING ARTS EVENTS

Barrier	All	Attendance Level		
		Nonattender	Attender	Frequent Attender
PRACTICAL				
Cost of tickets	27%	25%	27%	30%
Family obligations	17%	18%	18%	9%
Difficulty or cost of getting to or parking at events	10%	14%	9%	8%
Performances are in unsafe or unfamiliar locations	4%	4%	3%	7%
Not enough publicity or information about performances and times	12%	11%	13%	11%
PERSONAL				
Prefer to spend leisure time in other ways	30%	45%	27%	17%
Hard to make time to go out	42%	46%	42%	32%
No one to attend with	10%	15%	8%	7%
PERCEPTUAL				
Performing arts do not appeal	10%	26%	4%	2%
Feel uncomfortable or out of place at performing arts events	3%	8%	1%	1%
Have not enjoyed past performances	3%	7%	2%	1%

Source: Urban Institute Analysis of Sarasota Household Data, 2002.

NONATTENDERS: Nonattenders and attenders alike point to *lack of time* as a barrier to attendance. However, several barriers were cited as a big reason by a disproportionate number of nonattenders. Not surprisingly, nonattenders are more likely to say that they *prefer to spend leisure time in other ways* and that the *performing arts do not appeal* to them. In addition, nonattenders are more likely to say that they have *no one to attend with*, that they *feel uncomfortable or out of place* at performing arts events, *have not enjoyed past performances*, or cite *difficulty or cost of getting to or parking at events*.

ATTENDERS: Attenders give fewer clues for why they do not attend live performing arts events more frequently. Consistent with conventional wisdom, the two biggest barriers for attenders are *time* and *money*—two factors that are not unique to attenders. About one-quarter of attenders also cite a *preference to spend leisure time in other ways*.

FREQUENT ATTENDERS: Two items that frequent attenders rate higher as barriers are *cost of tickets* and *performances are in unsafe or unfamiliar locations*. Though the percentage differences are small, this overall trend differentiates Sarasota/Manatee from the other communities in this study.

Methodology

COMMUNITY SELECTION CONSIDERATIONS

The Sarasota survey is one in a series of 10 telephone surveys that each focus on a different metropolitan area or community. The communities were carefully selected, looking for the following characteristics that were deemed important to the success of the project:

- Representation of three or more of the five disciplines encompassed by the participating national service organizations.
- Financially and managerially strong local arts organizations.
- Established and strong working relationships between local arts organizations and their national service organizations.
- Willingness and ability of local arts organizations to be part of a working group.
- Established capacity for collecting data on the part of local arts organizations.
- Willingness on the part of local arts organizations to administer the surveys developed by the Performing Arts Research Coalition.
- Presence of supplemental funding sources in the community to help sustain this research in the future.
- Geographic diversity and a variety of community sizes.

LOCAL WORKING GROUP RESPONSIBILITIES

The working group of performing arts organizations in each of the communities chosen had six primary project responsibilities: (1) to participate in the design of survey instruments; (2) to collect data from its audiences and subscribers; (3) to use the audience, subscriber, and household data to design concrete strategies for improving the management of its organizations; (4) to use the audience, subscriber, and household data to make an impact on the role the arts play in the community; (5) to provide feedback on or write sections of project reports; (6) to consider ways to maintain local data collection efforts after the completion of the PARC project.

PROJECT DATA SOURCES

The PARC research framework relies on four data sources to contribute information toward a more comprehensive understanding of the performing arts. The following is a description of the four sources and the type of information they provide.

Administrative Surveys: Each of the participating national service organizations conducted annual surveys of its members, collecting extensive administrative data. Most provided information on the number and types of performances, attendance, and a range of financial information, including on sources of revenue and types of expenses. Selected items (or their definitions) from the existing surveys have been reviewed, and some new items have been added so that key data elements can be captured consistently across all the disciplines.

Audience Surveys: Audience surveys provided information on audience demographics, feedback on customer satisfaction and perceived performance quality, and some feedback on audience perceptions of the value of the performing arts. Audience surveys were administered by each of the participating arts organizations in each of the study sites. Two-page surveys were placed on seats in performance venues or handed to audience members in conjunction with performances according to specific procedures established by the Urban Institute.

Subscriber Surveys: As with the audience surveys, the subscriber surveys provided information on demographics and feedback on customer satisfaction and perceived performance quality. The subscriber survey contained expanded questions about the perceptions of the value of the performing arts to respondents, their families, and their communities. Participating arts organizations in each study site mailed the six-page survey to a randomly selected group of subscribers according to procedures established by the Urban Institute.

Household Telephone Surveys: Household telephone surveys collected information to help understand the attitudes of people who attend or do not attend the performing arts regularly, and to further understand why and how individuals can be motivated to become participants. The surveys of random households in each participating community were conducted by Princeton Survey Research Associates International according to procedures developed by the Urban Institute.

A Note about This Report

This report is based on an analysis of the responses from the Sarasota/Manatee household telephone survey only. Findings from the administrative surveys will be issued in a separate report. Data from the audience and subscriber surveys have been provided to the participating local arts organizations. Further analysis of these data is in the hands of local arts organizations and/or working groups.

HOW THE SARASOTA/MANATEE HOUSEHOLD TELEPHONE SURVEY WAS CONDUCTED

Survey respondents were selected using random digit dialing. Every active block of telephone numbers (area code + exchange + two-digit block number) were included from the Sarasota-Bradenton, MSA which consists entirely of Sarasota and Manatee counties. After random selection of a number within a block, two more digits were randomly added to complete the number. Numbers that matched listings in business directories were purged from the list. This method guaranteed coverage of every assigned phone number and did not require a preexisting list of active numbers.

Between October and December 2002, calls were made by Princeton Data Source, a subsidiary of Princeton Survey Research Associates International. Calls lasted approximately 20 minutes each. They were staggered over times of the day and days of the week to maximize the chance of making contact with potential respondents. Nearly one-quarter (23 percent) of the interviews were completed on the first call, but one took as many as 62 calls to secure an interview. Table A-1 documents the numbers of individuals who were contacted, cooperated, and completed the interview.

While a response rate of 38 percent is not inconsistent with other studies of this type, it raises questions of nonresponse bias. That is, one might suspect that people who could not be contacted, would not cooperate with the interview, or did not complete it might have responded differently, on average, from people who completed the interview. If so, and if the differences are relevant to issues under investigation in the study, then one cannot make reliable inferences from the study sample to the population of the Sarasota/Manatee area.

To investigate the potential for such bias, we compared the characteristics of the 801 respondents with known characteristics of the population (see table A-2). Population estimates are based on the 2000 Census of Population and Housing. The summaries in this table indicate that persons over the age of 65 are underrepresented among the survey respondents, while individuals between the age of 35 and 64 are slightly overrepresented. Overall, however, there is considerable similarity between survey respondents and the population estimate in race and sex characteristics. This similarity supports an assertion that the survey respondents are not substantially different from the nonrespondents. Nonetheless, the results reflect the attitudes of people who were willing to complete the survey.

A disproportional sample design and systematic nonresponse result in a measurable “design effect.” The design effect for the Sarasota/Manatee household telephone survey results in a margin of error of ± 4.0 percent. This means that in 95 of every 100 samples using the same methodology, estimated proportions based on the entire sample will be no more than 4.0 percentage points away from their true values in the population. However, design effects are only one source of error. For example, those people who chose to answer the survey questions may be different in some ways from people who chose not to respond, resulting in an unknown quantity of response bias on various survey questions.

SOMER’S D: LOOKING AT THE RELATIONSHIP BETWEEN QUESTIONS

In reviewing the survey results, we are frequently interested in knowing whether people who answer a particular way on one question also tend to answer a particular way on a different question. For example, past research has shown that people who have acquired more education are more likely to attend arts events than people with less education. This finding comes from looking at the relationship between two different variables—*education level* and *frequency of attendance*.

Somer’s *d* is a statistic that shows the strength of the relationship between two variables with a small number of ordered categories. By “ordered,” we mean that the question has categories that run in a meaningful way from low to high. Somer’s *d* indicates the extent to which respondents



TABLE A.1

DISPOSITION OF CALLS, SARASOTA/MANATEE HOUSEHOLD SURVEY

3943	dialed numbers
-1642	non-working numbers
2301	working numbers
-441	“non-contact”—language/health barrier, incomplete callbacks
1860	contacted numbers (80.8%)
-924	refusals
936	cooperating (50.3%)
-84	ineligible
852	eligible
-51	interrupted, incomplete
801	completions (94.0%)

$$\begin{aligned}
 \text{Response rate} &= \text{contacts} \times \text{cooperations} \times \text{completions} \\
 &= 80.8\% \times 50.3\% \times 94.0\% \\
 &= 38.2\%
 \end{aligned}$$

who report high or low values on one variable also report high or low levels on another variable. For example, if we observe that tall people are very talkative and short people say very little at all, we would expect a high value of Somer’s *d* for the variables *height* and *verbosity*. On the other hand, if tall and short people have roughly the same number of talkative and nontalkative types, we would get a low Somer’s *d*, and we would conclude that there is no relationship between the two variables.

Throughout this report, we assume respondent education level, household income level, and age to be independent variables that predispose respondents toward certain behaviors or values (dependent variables). For these relationships, we report on an *asymmetric* Somer’s *d* value that assumes a causal relationship between variables. However, for voting behavior and volunteerism, we make no such causal references. For associations involving these variables, we report a *symmetric* Somer’s *d* value that makes no presumptions about which variable is independent and which is dependent.

Somer’s *d* runs from a value of 0.0 (no relationship) to 1.0 (perfect relationship), although it is usually quite low because of the conservative way in which it is calculated. A positive sign (+) in front of the number means that there is a *positive relationship* between the variables; that is,



TABLE A.2

CHARACTERISTICS OF SARASOTA/MANATEE HOUSEHOLD RESPONDENTS (N=801)

	Population Estimate	Survey Respondents
RACE		
White	710	688
Black	38	37
Asian/Pacific Islander	7	10
Hispanic/Latino	44	41
American Indian/Alaskan Native	2	7
Missing (did not report)	0	18
SEX		
Men	372	352
Women	429	449
AGE		
18-24	50	57
25-34	110	91
35-44	119	144
45-54	116	143
55-64	111	133
65+	296	215
Missing (did not report)	0	18

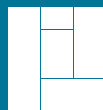
high values on one variable are associated with high values on the other. A negative sign (–) indicates a *negative relationship*; that is, high values on one variable go with lower values on the other variable, and vice versa.

A Somer's d value of less than –0.15 or more than +0.15 is worth paying attention to. For values closer to 0.0, the relationship is probably best thought of as weak or nonexistent. In footnotes throughout the report, we note relationships that approach this 0.15 threshold.

PERFORMING ARTS RESEARCH COALITION

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