



# Heartland Arts Fund

a joint venture of Arts Midwest and Mid-America Arts Alliance



February 14, 2005

Dear Colleague:

Mid-America Arts Alliance and Arts Midwest, co-creators of the Heartland Arts Fund, have been working together to research issues facing performing arts presenters in communities across our combined 15-state heartland region. We have a long history of working with arts presenters, and in these constantly changing times, we wanted to know you better.

We conducted a mail survey sent to approximately 3,000 presenters in the heartland region and received 546 responses.

Your participation in this survey was an important investment into the long-term vitality of performing arts in the heartland. As promised, we have attached a copy of the executive summary of the survey report. We hope you will find the summary informative. If you are interested in reading the report, you can access it by the following web sites:

Mid-America Arts Alliance  
Arts Midwest

[www.maaa.org](http://www.maaa.org)  
[www.artsmidwest.org](http://www.artsmidwest.org)

Thank you again for your participation in this survey, and on behalf of Mid-America Arts Alliance and Arts Midwest, we thank you for the continuing good work you do for your community.

Cordially,

A handwritten signature in black ink, appearing to read "D. Fraher".

David J. Fraher  
Executive Director, Arts Midwest

A handwritten signature in black ink, appearing to read "Mary Kennedy McCabe".

Mary Kennedy McCabe  
Executive Director, Mid-America Arts Alliance

# INTRODUCTION

The overarching purpose of this research was to explore a variety of issues facing performing arts presenters in communities across the 15-state heartland region, with the goal of understanding constituent institutions' greatest needs and gathering insights to determine how to best help them achieve their goals. Specific areas of inquiry included constituents' organization, programming, facilities, access to/use of technology, training and professional development needs, and community demographics. Specific objectives for the research can be found in the Introduction section of the full report.

To accomplish the above objectives, Mid-America Arts Alliance (M-AAA) and Arts Midwest (AM) undertook a mail survey method for collecting data from members of the target audience. Distribution of mail surveys was managed entirely by M-AAA and Arts Midwest. Market Directions was responsible for entering data, tabulating, analyzing, and reporting results of the survey. Surveys were distributed in March 2004. A total of 546 surveys were completed and returned to Mid-America Arts Alliance by the cutoff date of July 16, 2004. These 546 surveys were subsequently entered and analyzed by Market Directions.

## EXECUTIVE SUMMARY

The executive summary highlights key findings from the research. Readers are invited to review the full report for more in-depth coverage of each survey question and for precise statistics underlying the observations noted herein regarding differences among sample subgroups.

### *Organization*

Four in ten respondents have an annual operating budget of \$100,000 or less. Sixteen percent have a budget of more than \$1 million.

- Respondents are nearly 50% more likely to say their budgets have increased (44%) than decreased (30%) in the past year.
- Among those reporting budget increases, 60% report increases smaller than 14 percent. The average increase was 16%.
- Among those reporting decreases, 45% report increases smaller than 14%. The average reported decrease was 18%.

Artist fees consume 37% of budgets, versus only 10% for building maintenance and 5% for professional development.

- 52% say artist fees have increased over the past 3 years, versus 14% who say they have decreased. The average increase was 18%.

Sixty-two percent of institutions surveyed receive funding from the state, 39% from the city, and 25% from the NEA.

- Largest nongovernment sources of funding include individuals (83%) and corporations/businesses (75%). Other nongovernment sources include local community foundations (42%), regional arts organizations (33%), and local foundations (27%).
- Three-fourths of respondents report receiving income through ticket sales. Concessions (36%), hall rental (32%), and paid advertising (30%) are also relatively frequent mentions.

A majority (54%) report total annual attendance of 10,000 or less. Twenty-six percent (26%) report attendance levels between 10,001 and 50,000

- Audience composition is roughly 43% adults, 26% K-12 students, 24% seniors, and 11% college/university students.
- About two-thirds (64%) of audiences are comprised of single ticket buyers, with 24% season ticket holders.

A great many differences are observed among subgroups within the total sample (e.g., institutions from communities of varying sizes, with varying budgets, M-AAA vs. Arts Midwest institutions, etc.). Many of these differences are cited below:

- Cultural series organizations tend to reside in larger communities. They are more likely to report increased budgets, greater increases in artist fees, and greater numbers of season ticket holders. In addition, cultural series organizations are more likely to report receiving funding from the city as well as from nongovernmental sources.
- Performance facilities tend to reside in larger communities and have relatively large budgets. They are more likely to report decreased budgets, funds received from the city, nongovernmental sources of income, earned income, greater attendance, and audiences with higher percentages of K-12 students.
- Colleges/universities are more likely to report decreased budgets, greater increases in artists fees, and the fewest adult and senior audience members.
- Arts councils tend to reside in smaller communities and have lower budgets.

Additional important subgroup differences are as follows:

- Community size and budget increase are in unison.
- Larger communities are more likely to report increased budgets.
- Institutions with very small budgets are more likely to report no change in their annual budgets.
- Institutions with very high budgets are more likely to report increased budgets.
- Low-budget institutions spend a greater percentage of their budgets on artists' fees.
- Respondents whose budgets have increased are more likely to report funds from individuals, corporations/businesses, and local community foundations.
- Attendance increases in relation to annual budget and community size.
- Communities with more than 250,000 residents and institutions with annual budgets of \$250,000 or more have the most adults but the fewest seniors as a proportion of their audience.
- Those experiencing an increase in their budget have more season ticket holders than do their counterparts.

Significant differences between M-AAA and Arts Midwest respondents include the following:

- Arts Midwest respondents are more likely to report increased annual budgets, while M-AAA respondents are more likely to report no change.
- M-AAA institutions are more likely to report a decrease in artists' fees.
- M-AAA respondents are more likely to report receiving funding from city, state, and NEA sources.
- M-AAA respondents report higher numbers of season ticket holders.

### ***Programming***

Music is the most frequently presented art discipline by a wide margin, with folk/traditional (mentioned by 44%), general music (43%), and jazz (42%). Eleven of the 13 disciplines presented by 30% or more of respondents were music.

Just under half (47%) report no change in the number of artists/ensembles they have contracted over the past three years. Thirty percent report increases, averaging a 27% increase. Sixteen percent report decreases, averaging 25%.

The most frequently mentioned source of information about artists is word of mouth, mentioned by 22% of respondents. Direct mail from managers/agents and contact with the artists are distant seconds at 14%.

The single most important factor in choosing artists to perform at a facility is quality of the artist, ranked #1 by 40% of respondents. Meeting programming goals and the artists' fees are the next most frequently ranked items, at 14% and 13%, respectively.

Subgroup differences that arise under the topic of programming include the following:

- Performance facilities report more types of performances than do other types of institutions.
- Larger-population communities and larger-budget institutions report more types of performances.
- Larger communities and institutions with larger budgets are more likely to report an increase in the number of artists/ensembles contracted.
- Folk music and oral traditions are more likely to be presented in communities of 10,000 or less.
- Those reporting increases in their budgets are more likely to report an increase in the number of artists/ensembles contracted.
- Cultural series organizations are more likely to mention "quality of artist" as a factor in choosing artists.
- Larger communities are more likely to mention "quality of artist" as a factor in selecting artists, whereas respondents in small communities are more likely to rank "artist fee," "funding availability," and "targeting specific audiences within community" as factors in selecting artists.
- Respondents with low annual budgets are especially sensitive to funding availability when selecting performing artists.

Differences between M-AAA and Arts Midwest include the following:

- M-AAA respondents are more likely to present general music and general dance.
- M-AAA respondents are more likely to mention state rosters/catalogs as an artist information source.
- Arts Midwest respondents are more likely to site regional conferences as artist information source.
- M-AAA respondents are more likely to mention funding availability as a factor in choosing artists.

### ***Facilities***

Slightly fewer institutions own their primary facility than do not (43% versus 47%). Three-fourths (75%) of those surveyed rent out their primary facility. Performance facilities and those with budgets in excess of \$50,000 are especially likely to rent out their facilities.

Differences among population subgroups include the following:

- Colleges and universities are more likely to own their facility, whereas cultural series organizations are less likely to own their facility.
- Those with very large budgets (over \$250,000) are much more likely than lower-budget institutions to own their facility.

### ***Technology***

Seventy-one percent of those responding to the survey say between 76% and 100% of their institution's staff have desktop Internet access.

- Arts Midwest respondents have greater access to the Internet than M-AAA respondents.
- Those in colleges and universities report greater Internet access than their counterparts.
- Internet access increases in relation to annual budget and community size.

Nearly nine out of ten respondents (88%) report using PCs, whereas only 16% use Mac. Use of both platforms increases in relation to annual budget and community size.

Eighty-six percent report using Adobe Acrobat Reader. Use of this software is lowest among cultural series organizations. In contrast, use of Acrobat increases in relation to annual budget.

### ***Training & Professional Development***

By far, the largest component of institutions' staff is comprised of part-time volunteers, at 48% on average. Full-time paid staff trails at 13%, then part-time paid at 11% and full-time volunteers at 4%.

The most popular areas of training for directors are development/fundraising (36%) and strategic or long-range planning (34%). For other staff, the most popular area of training is computer technology (34%).

- Areas of training perceived as most important include development/fundraising (4.2 mean), followed by marketing/public relations (4.1) and strategic or long-range planning (3.8). Overall, strategic activities are rated more important than the more tactical/practical areas such as facility management (2.7) and technical training for the theater (2.4).

The six most popular methods used to stay current with professional practices are all mentioned by between 10% and 13% of respondents. They include local training not at a university (13%); magazines, professional journals, or newsletters (12%); national conferences (11%); in-state regional meetings (11%); regional conferences (10%); and state conferences (10%).

Approximately one quarter of those surveyed (26%) sent someone to the Midwest Arts Conference.

- Reasons most frequently mentioned for not attending the Midwest Arts Conference include cost (38% ) and being unaware of the conference (29%).

Slightly more than half of respondents (51%) say their organization spent \$500 or less for training opportunities for their staff in 2003. Twenty-three percent report spending between \$1,001 and \$5,000.

The most frequently reported obstacle to attending off-site training opportunities is lack of funding (79% ), followed by lack of time (56%) and lack of staff (29%). Respondents who report budget decreases are more likely to mention lack of funding.

Significant differences among sample subgroups are outlined below:

- The number of paid employees and part-time volunteers increases in relation to both annual budget and community size.
- Performance facilities tend to have more full-time paid and part-time volunteer employees than other types of institutions.
- Colleges/universities are least likely to report needing training in volunteer management, board management, and development/fundraising.
- Cultural series organizations are least likely to report needing training in facility management and technical training for the theater.
- In-state regional meetings and state conferences are more prevalent as ways to keep current with professional practices in communities with 50,000 or fewer.

- Respondents with budgets up to \$50,000 are most likely to stay current by using the Internet
- Attendance at the Midwest Arts Conference increases in relation to the size of the community.
- Respondents from colleges/universities and performance facilities are more likely to report attending the Midwest Arts Conference than are respondents from cultural series organizations.
- Respondents with annual budgets less than \$50,000 are less likely to attend the Midwest Arts Conference.
- Respondents whose budgets have increased are more likely to have attended the Midwest Arts Conference.
- Those with large annual budgets (over \$250,000) are more likely to mention conference timing as a barrier, whereas lower-budget institutions (up to \$50,000) are more likely to mention location.
- Training spending increases in relation to both annual budget and community size.

Finally, AM respondents have more part-time paid employees and are more likely to attend the Midwest Arts Conference than are M-AAA respondents.

### ***Community Demographics***

Half of respondents serve communities of 50,000 or fewer individuals. Annual budgets and size of community are directly correlated—an increase in one is marked by an increase in the other.

According to respondents, Caucasians make up more than three-fourths (77%) of the ethnic makeup of the communities they serve.

- Over 4 in 10 survey participants (43%) indicate that their audience reflects the ethnic population of the community either extremely well or somewhat well. Two in ten (21%) say “not very well” or “not at all well.”
- Respondents estimate that Caucasians make up more than four in five (85%) of the ethnic population of their audiences.
- Survey participants estimate overall that Caucasians are slightly overrepresented in their audiences (85% of audience versus 77% of the community).

Notable subgroup differences include the following:

- Respondents in Arts Midwest states report higher percentages of Caucasians and Asian Americans, whereas M-AAA respondents report higher concentrations of Hispanics/Latinos.
- Colleges/universities and performance facilities generally report feeling more confident that their patrons reflect the ethnic population of the community.
- The percent of the audience made up of African Americans is highest among organizations with an annual budget over \$250,000.
- Audiences in communities with 10,000 or less have the greatest percentage of Caucasians, while minorities are more plentiful among audiences in communities greater than 250,000.

Business or services are the primary industry (25%) in the communities served by respondents, followed by farming/ranching (24%) and manufacturing/factory (20%).

- Considering both primary and secondary industries, business or services continues to dominate, being mentioned by 57% of survey participants, followed by education (56%) and manufacturing/factory (54%).

## *Conclusions*

Many of the differences noted among institutions in communities of varying size, having budgets of varying size, etc., have important implications for both M-AAA and Arts Midwest.

1. Larger-budget institutions, as well as those located in higher-population communities, have distinct characteristics.
  - They generally have access to a greater variety of funding sources.
  - They are more likely to report increased budgets—also true of Arts Midwest members.
  - They are able to provide greater variety of programming and sign more artists/ensembles.
  - They have larger staffs and spend more on training.

These characteristics directly impact the support and communication sought from M-AAA and Arts Midwest. For example, counseling regarding specific staff training courses is likely to be especially valued by larger institutions.

2. Lower-budget institutions and those in smaller communities also have distinct characteristics impacting their relationship with and needs from M-AAA and Arts Midwest.
  - Funding is a critical factor influencing multiple facets of their operations (e.g., programming, training, artist selection, etc.).
  - They are more likely to report no change to their budgets—also true of M-AAA members.
  - They tend to recur more frequently to in-state regional meetings and state conferences to keep current with professional practices.
  - Their access to the Internet is slightly lower, but they are more likely to view the Internet as a critical source of information about professional practices.

Large, regional conferences like the Midwest Arts Conference will be less effective in communicating to these institutions. E-mail and Web pages will likely have a better effect and will be more appreciated. Also, messages providing leads to training and/or information sources that can be accessed inexpensively are likely to be received very favorably.

3. Results further indicate that the means of communicating information to institutions about artists will vary among M-AAA and Arts Midwest organizations.
  - M-AAA respondents indicate rosters/catalogs are more often utilized.
  - Arts Midwest respondents report seeking information more often through regional conferences.
4. Although evidence suggests that minorities are underrepresented in members' audiences, the deficiency is very slight.
  - Consequently, programming should require only slight change, if any at all, to draw in greater numbers of minority patrons. Such decisions should probably be made at the local level.
  - Data suggest that M-AAA organizations may benefit from slight increases in programming targeted to Hispanics/Latinos.
  - Data further suggest that Arts Midwest organizations may benefit from slight increases in programming targeted to Asian Americans.