

NATIONAL CENTER FOR ARTS RESEARCH

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NCAR ARTS LEADER SENTIMENT SURVEY

Key Insights

May 2013

Based on analyses conducted by Juliana Rogers
SMU MA/MBA Class of '13



SMU National Center for Arts Research (NCAR)

Advancing the arts through evidence-based knowledge

Mission Statement

To be the leading provider of evidence-based insights that enable arts and cultural leaders to overcome challenges and increase impact

ABOUT

NCAR
ARTS LEADER SENTIMENT SURVEY

The Arts Manager Sentiment Survey collects and disseminates the opinions of national arts leaders in order to provide near-time arts leader attitudes on the cultural sector climate.

Survey Operation

- This year marks the first Arts Manager Sentiment Survey, which builds on work by James Abruzzo (abruzzoassociates.com) and is administered via an Internet survey. Questions will repeat in the future to observe trends.

Survey Sample

- 2,308 arts leaders from across the nation
- 188 responded for an 8.1% response rate

Survey Administration

- Email contact with two follow-up reminders
- Survey live from February 13-March 27, 2013



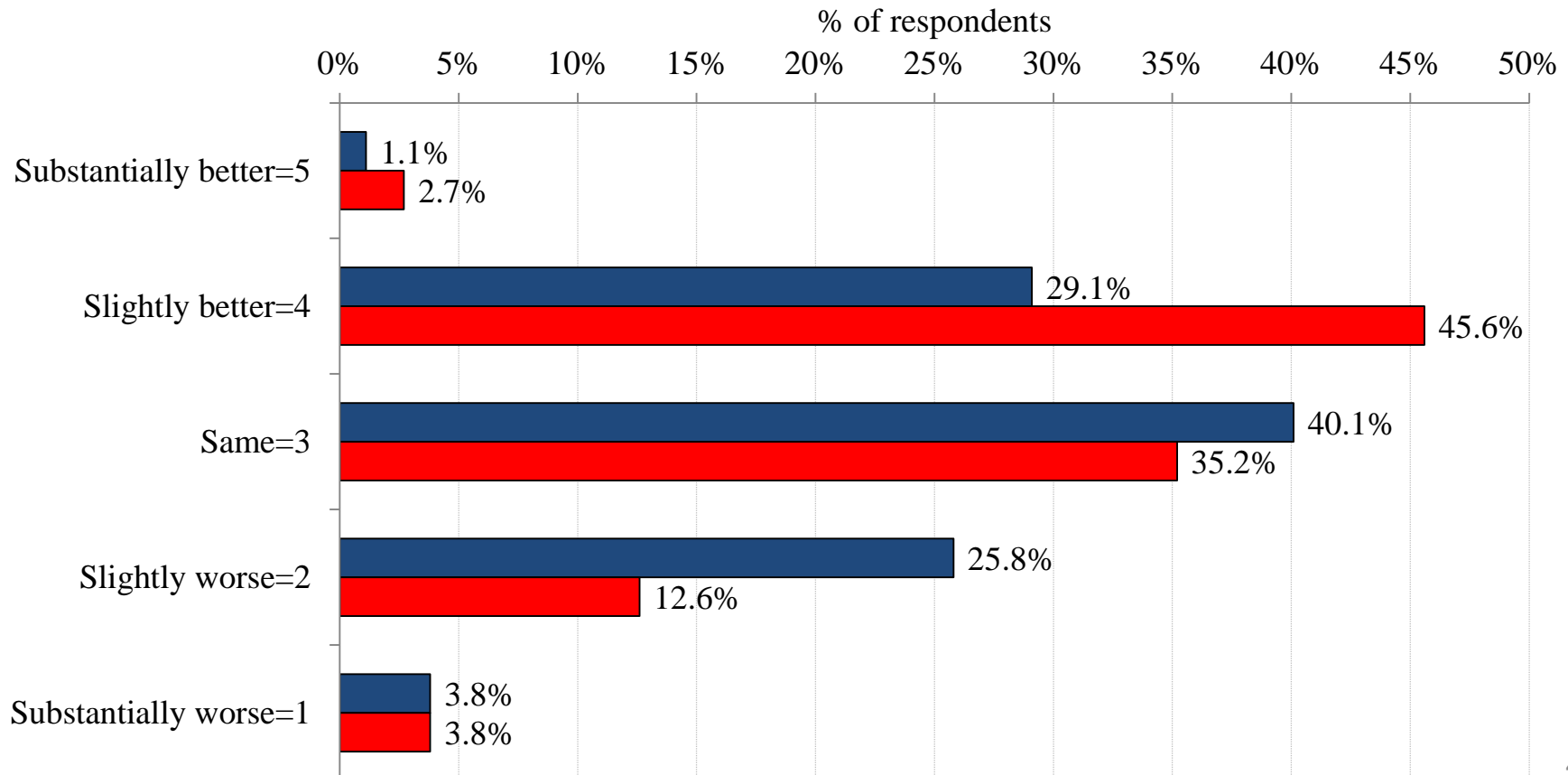
Issues and Results:

| | |
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| Issue 1: Outlook on Local Conditions in the Cultural Sector | 4-6 |
| Issue 2: Outlook on Attendance | 7-8 |
| Issue 3: Outlook on Earned Revenue | 9-11 |
| Issue 4: Outlook on Contributed Revenue | 12-14 |
| Issue 5: Outlook on Quality | 15-16 |
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Arts leaders generally have a brighter outlook on future cultural sector conditions in their local markets



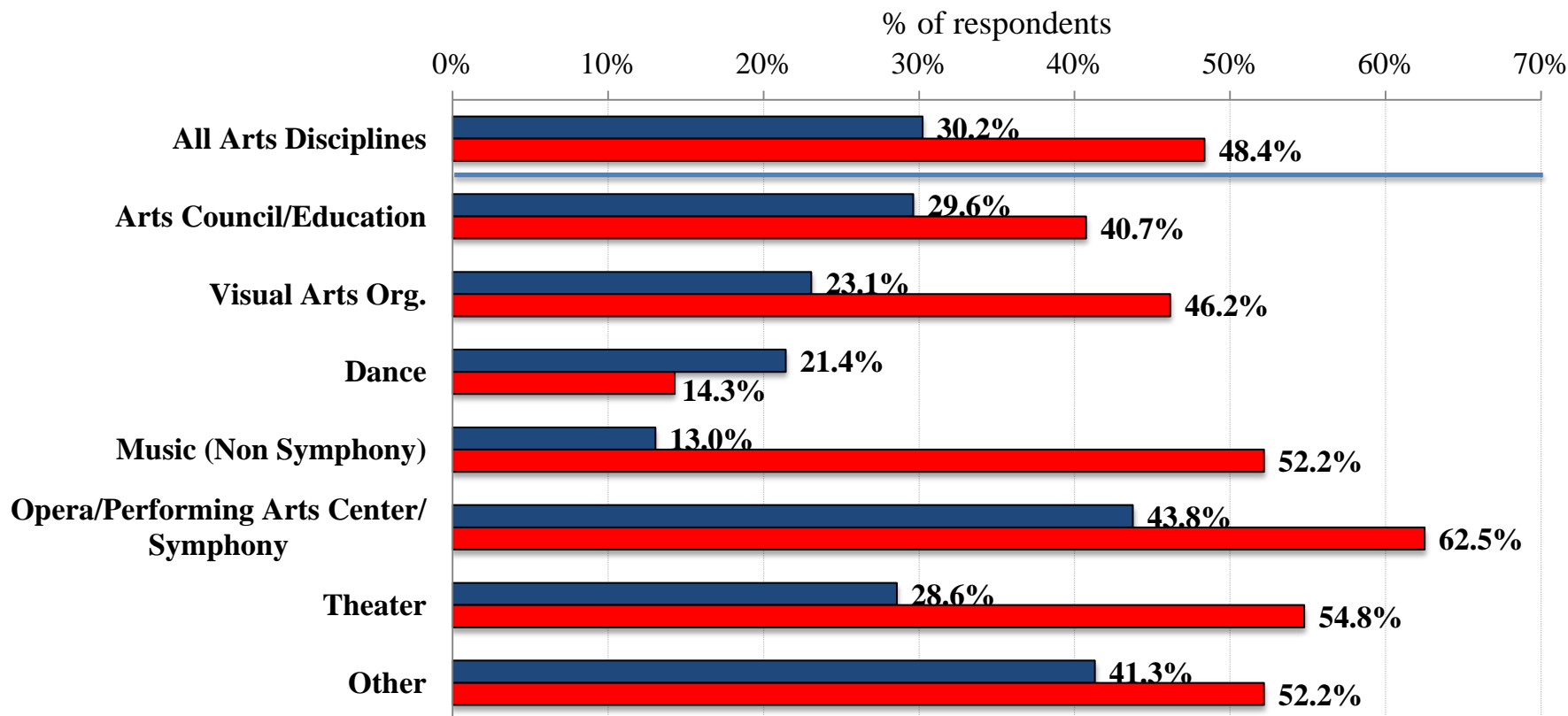
- Figure 1.1:**
- Are overall conditions for the cultural sector in your local market better or worse today than they were a year ago? (mean=2.8)
 - Looking forward – a year from now, will the overall conditions for the cultural sector in your local market be better or worse than they are today? (mean=3.3)



Dance is the only arts sector that perceives past conditions as more favorable than future conditions



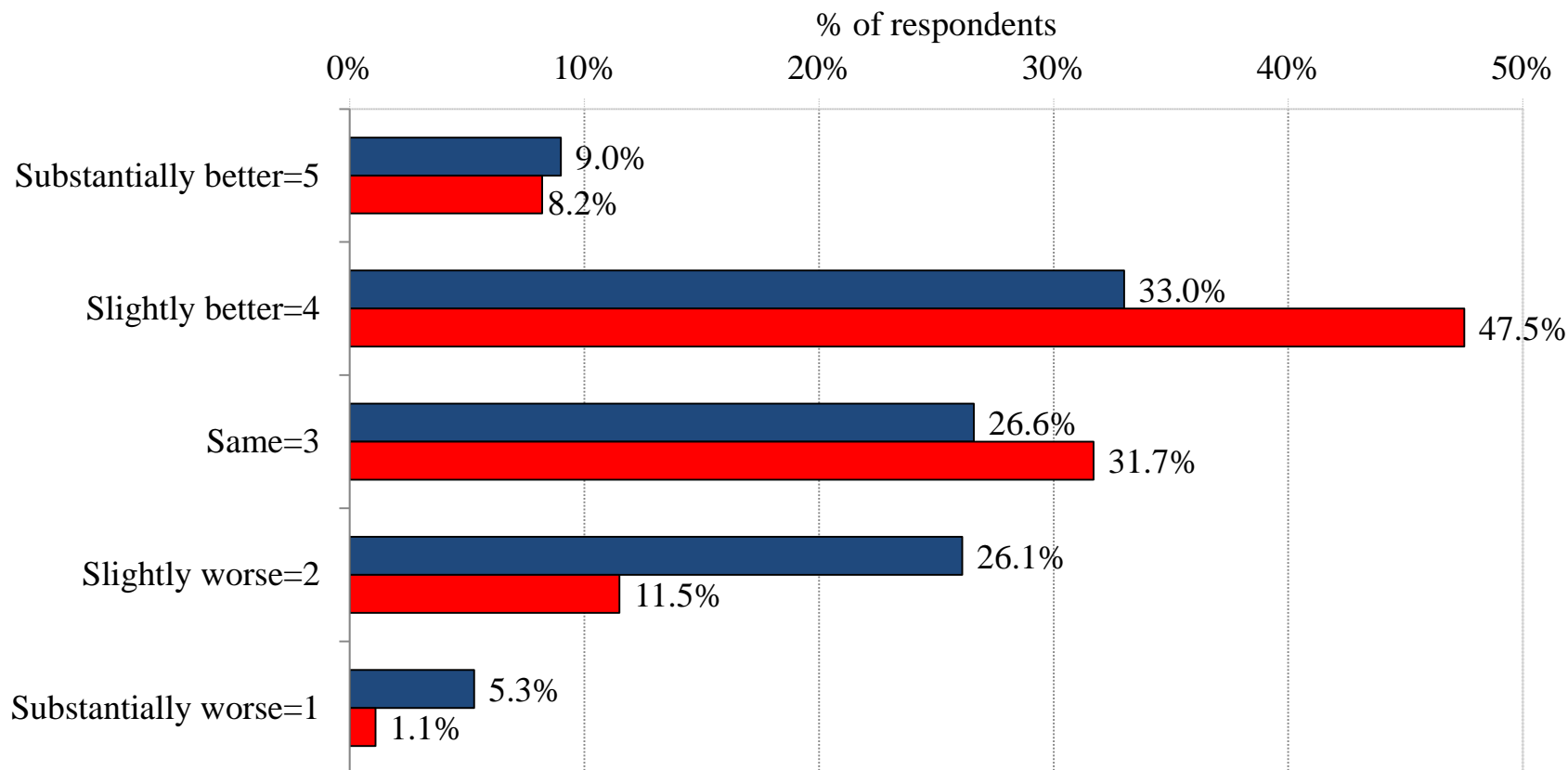
Figure 1.2: ■ Percent who perceive the overall conditions for the cultural sector in their local market today as being slightly or substantially better than they were a year ago
 ■ Percent who believe that a year from now the overall conditions for the cultural sector in their local market will be slightly or substantially better than they are today



Attendance in the most recent year was equal to or slightly worse than expectations and the majority of leaders are optimistic about future attendance



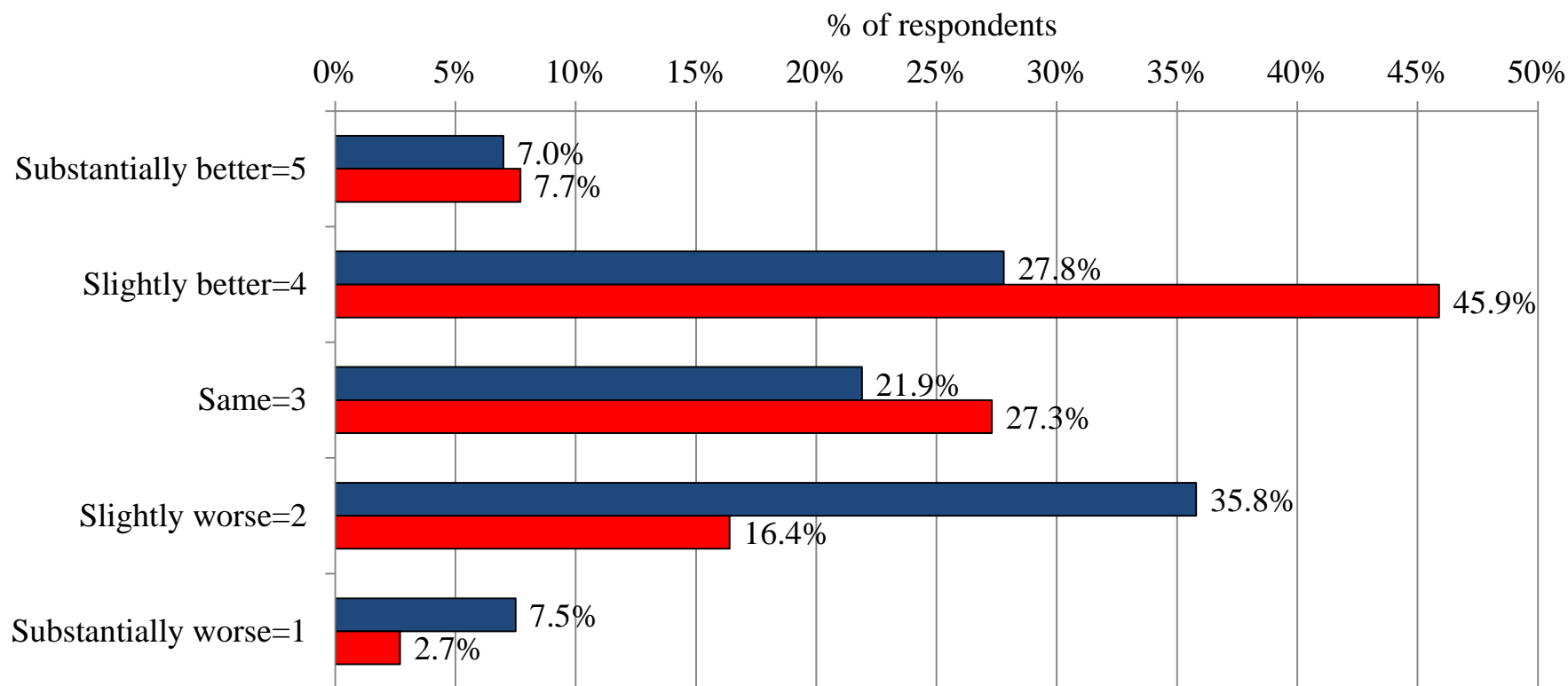
Figure 2: ■ How did attendance during your most recent fiscal year compare to your expectations? (mean=3.1)
 ■ What are your projections for attendance this year compared to last year? (mean=3.5)



Optimism about future earned revenue is high, despite earned revenue frequently falling slightly short of expectations in the most recent year



Figure 3.1: ■ How did earned revenue during your most recent fiscal year compare to your expectations? (mean=3.0)
 ■ What are your projections for earned revenue this year compared to last year? (mean=3.4)



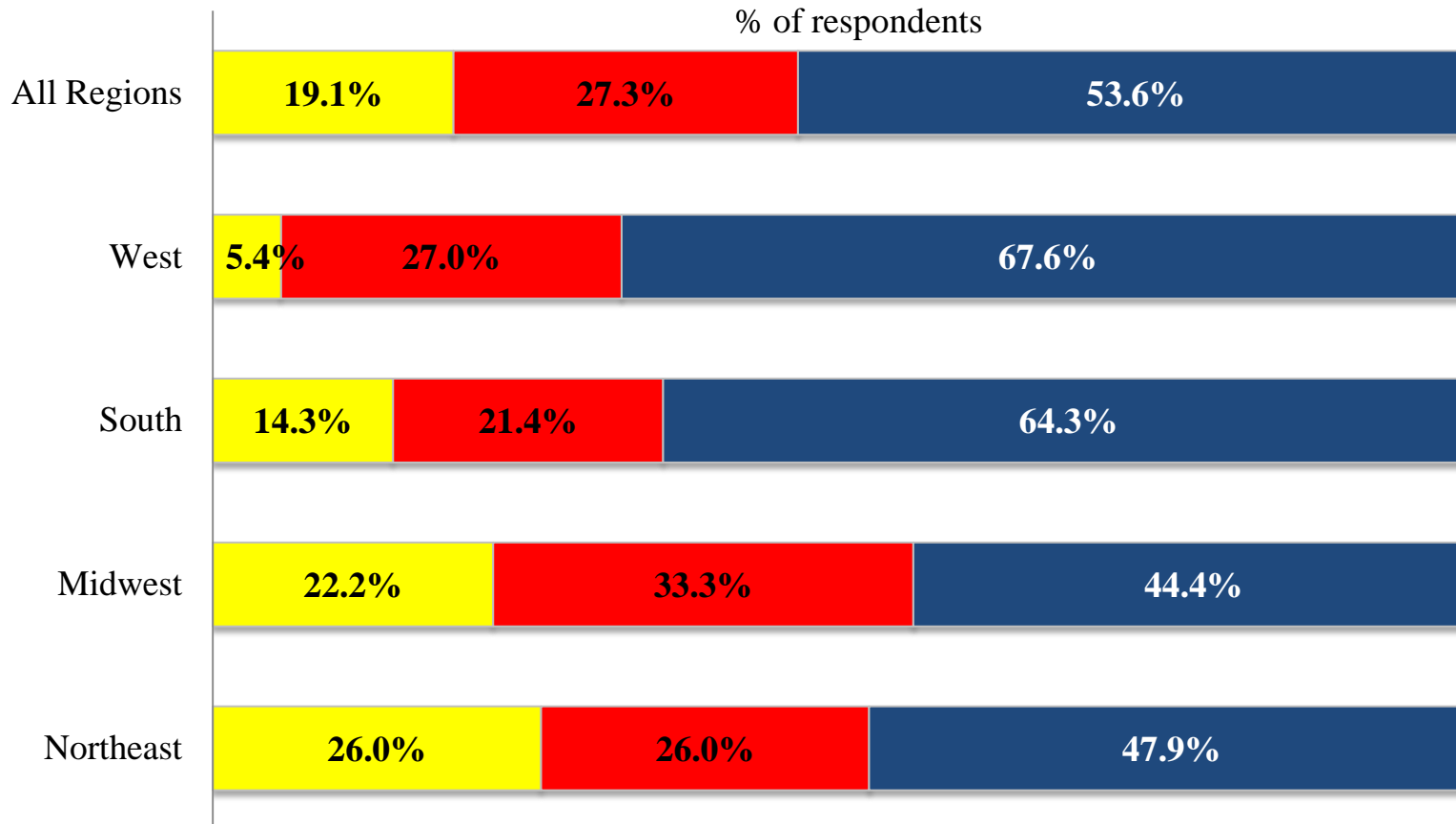
Arts leaders in the West are the most optimistic about earned revenue and leaders in the Midwest are the least



Figure 3.2: What are your projections for earned revenue this year compared to last year?

■ % Slightly or Substantially Worse ■ % Same ■ % Slightly or Substantially Better

% of respondents

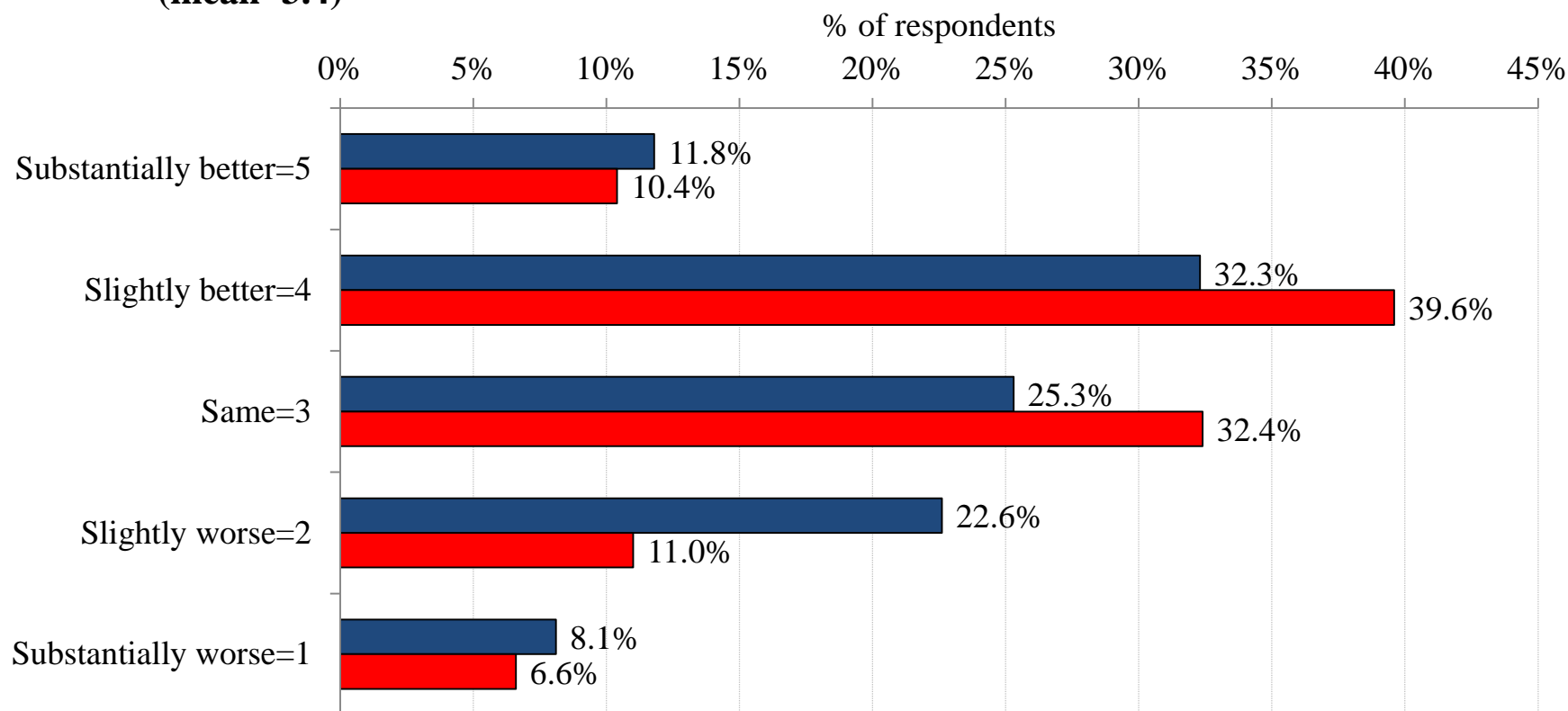


The outlook for future contributed revenue is consistent with past performance, which tended to meet or exceed expectations



Figure 4.1: ■ How did contributed revenue during your most recent fiscal year compare to your expectations? (mean=3.2)

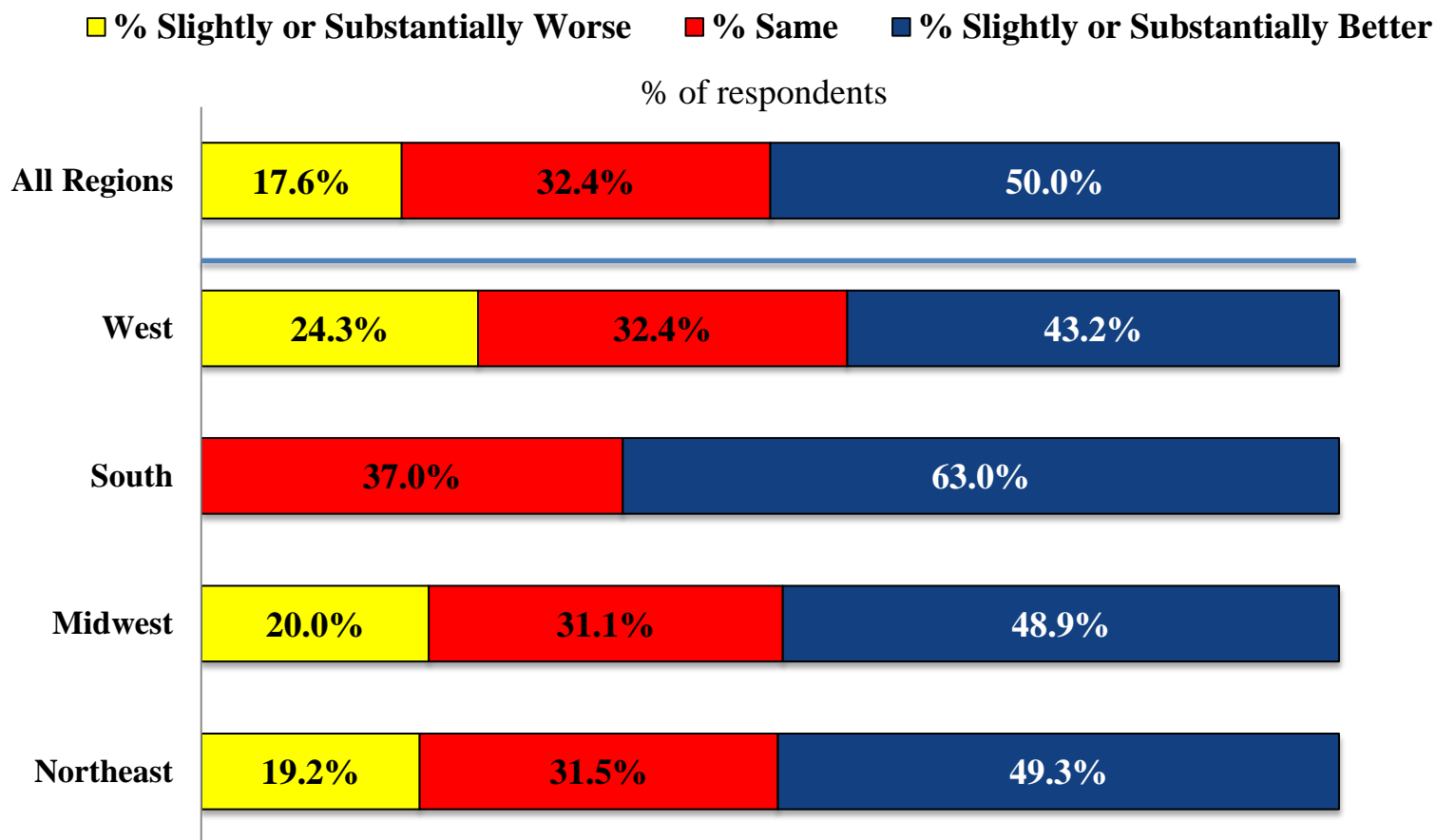
■ What are your projections for contributed revenue this year compared to last year? (mean=3.4)



Arts leaders in the South tend to be most optimistic about contributed revenue in the coming year



Figure 4.2: What are your projections for contributed revenue this year compared to last year?

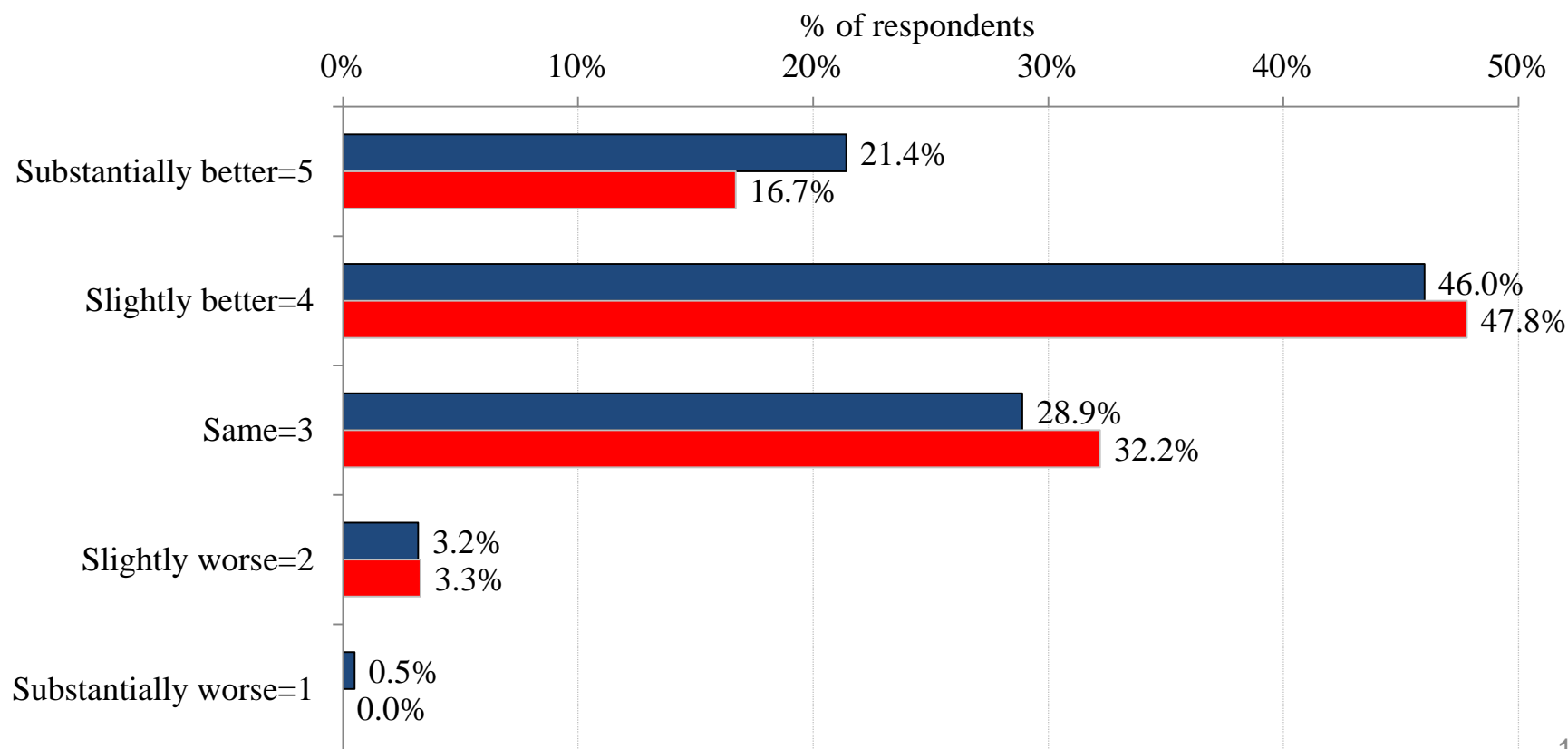


Arts leaders tend to rate the quality of program offerings highly and expect that quality will continue to strengthen



SMU

- Figure 5:**
- How would you evaluate the actual quality of your program offerings during your most recent fiscal year compared to your expectations? (mean=3.8)
 - What are your expectations for the quality of your program offerings this year compared to last year? (mean=3.8)



Arts leaders plan to take risks at similar or higher levels compared with the past year



Figure 6.1: How would you characterize the riskiness of your decision-making during your most recent fiscal year? (% of responses)

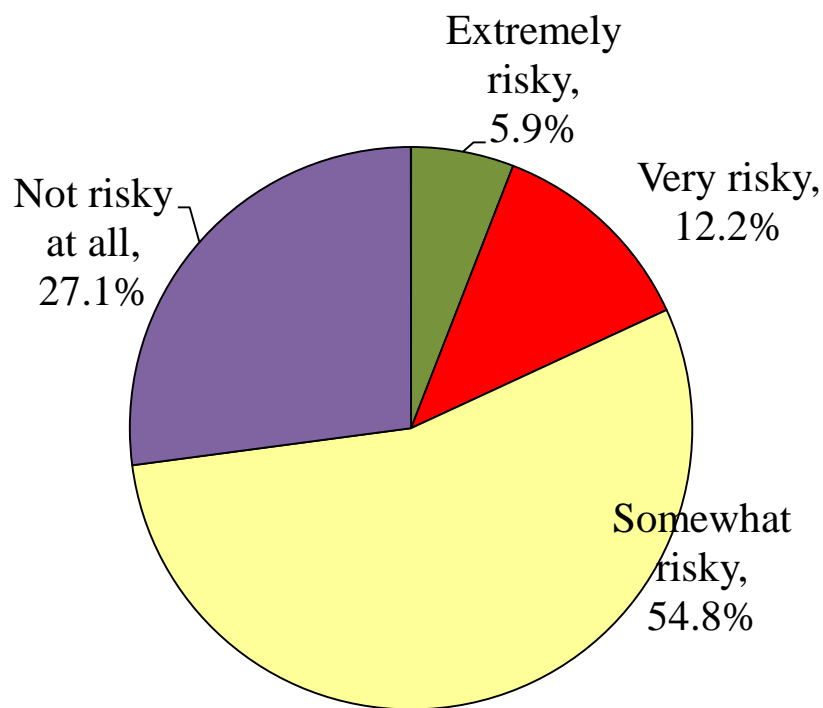
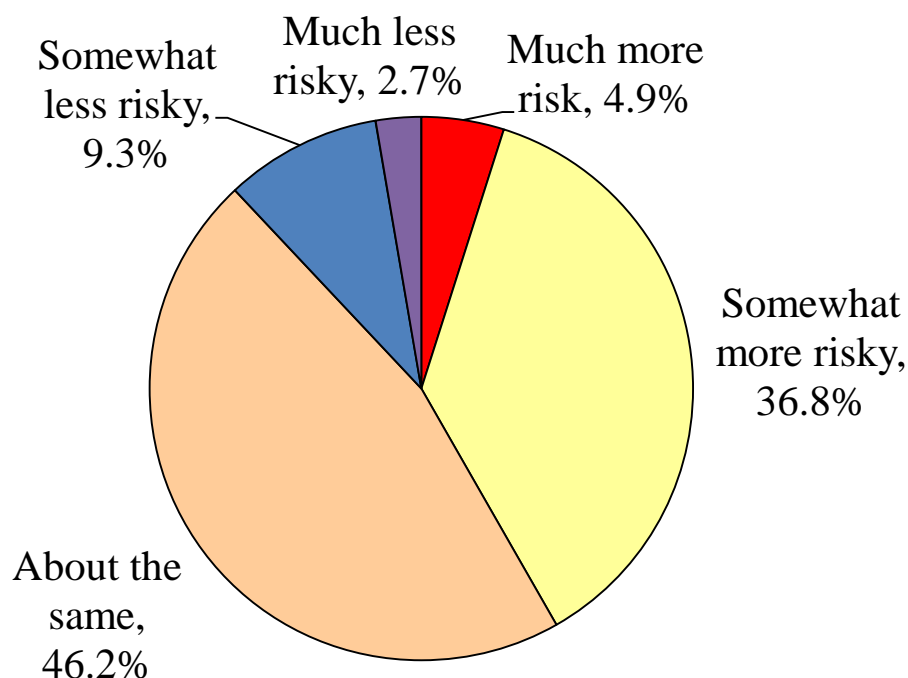


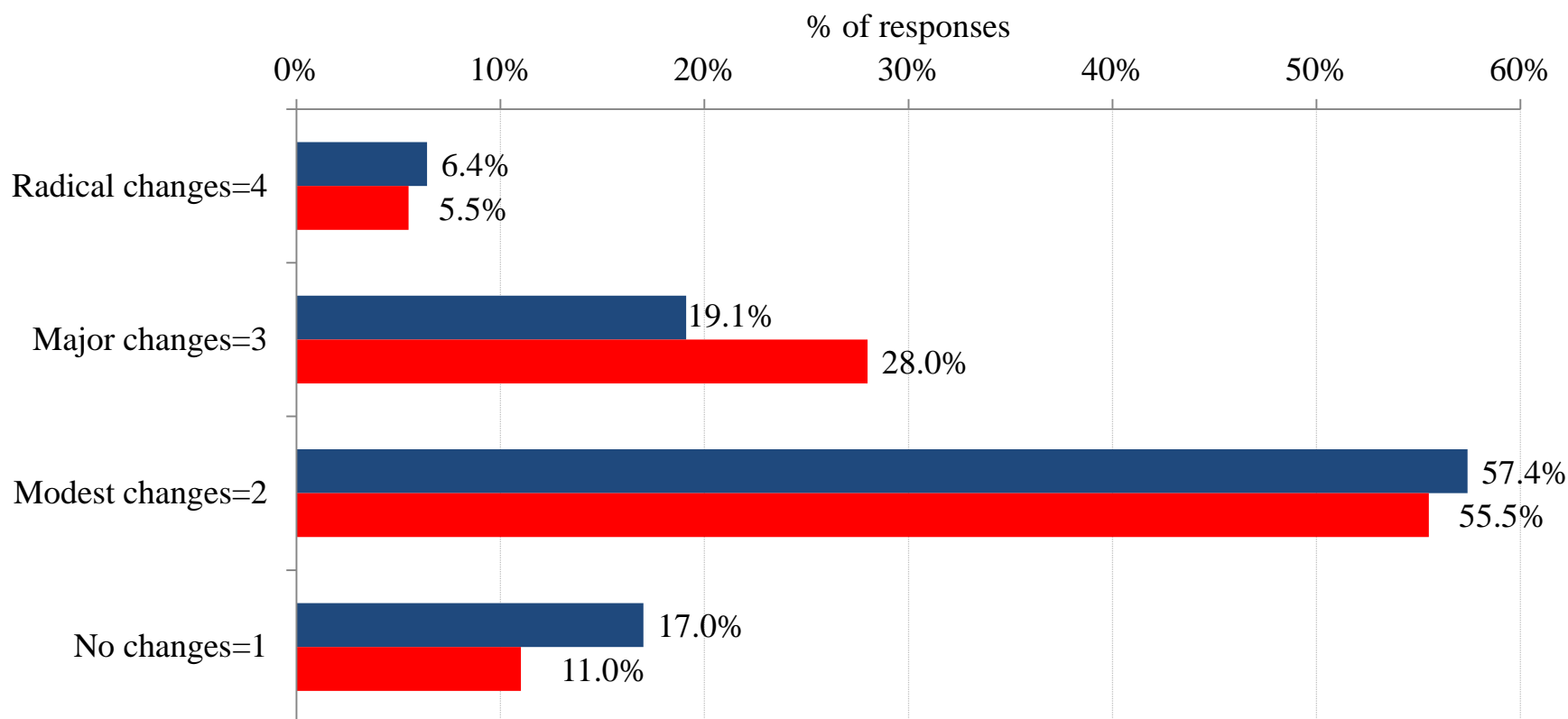
Figure 6.2: What level of risk taking are you incorporating into your decision making this year compared to last year? (% of responses)



Modest and moderate strategic changes were initiated in the past year and will continue in the coming year



Figure 7: ■ Did you initiate strategic changes during your most recent fiscal year? (mean=2.1)
 ■ Are you initiating strategic changes this year? (mean=2.3)



Participant Summary

ARTS DISCIPLINE

| | |
|---------------------------------------|-----|
| Theater | 23% |
| Arts Council/Education | 15% |
| Music (Non Symphony) | 13% |
| Opera/Performing Arts Center/Symphony | 9% |
| Dance | 8% |
| Visual Arts Organization | 7% |
| Other | 25% |

BUDGET SIZE

| | |
|--------------------------|-----|
| Less than \$250,000 | 47% |
| \$250,000 - \$500,000 | 18% |
| \$500,000 - \$1 Million | 12% |
| \$1 - \$2.99 Million | 13% |
| Greater than \$3 Million | 10% |

REGION

| | |
|-----------|-----|
| Northeast | 40% |
| Midwest | 25% |
| South | 16% |
| West | 20% |

JOB TITLE

| | |
|-------------------------------------------------|-------|
| Executive/Managing Director | 50.0% |
| Artistic Director | 12.1% |
| Director of External Affairs/Marketing/Develo.. | 8.2% |
| General/Producing Director | 5.5% |
| Finance Director | 4.4% |
| Other | 19.8% |