

# NATIONAL CENTER FOR ARTS RESEARCH

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## NCAR ARTS LEADER SENTIMENT SURVEY

*Key Insights*

*January 2014*

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 marks the second Arts Manager Sentiment Survey, which builds on work by DHR International and is administered via an Internet survey. Results of the first survey were released in May 2013. Questions will repeat in the future to observe trends.

### Survey Sample

- 2,756 arts leaders from across the nation
- 201 responded for an 7.3% response rate

### Survey Administration

- Email contact with two follow-up reminders
- Survey live from September 30-November 1, 2013



**Issues and Results:**

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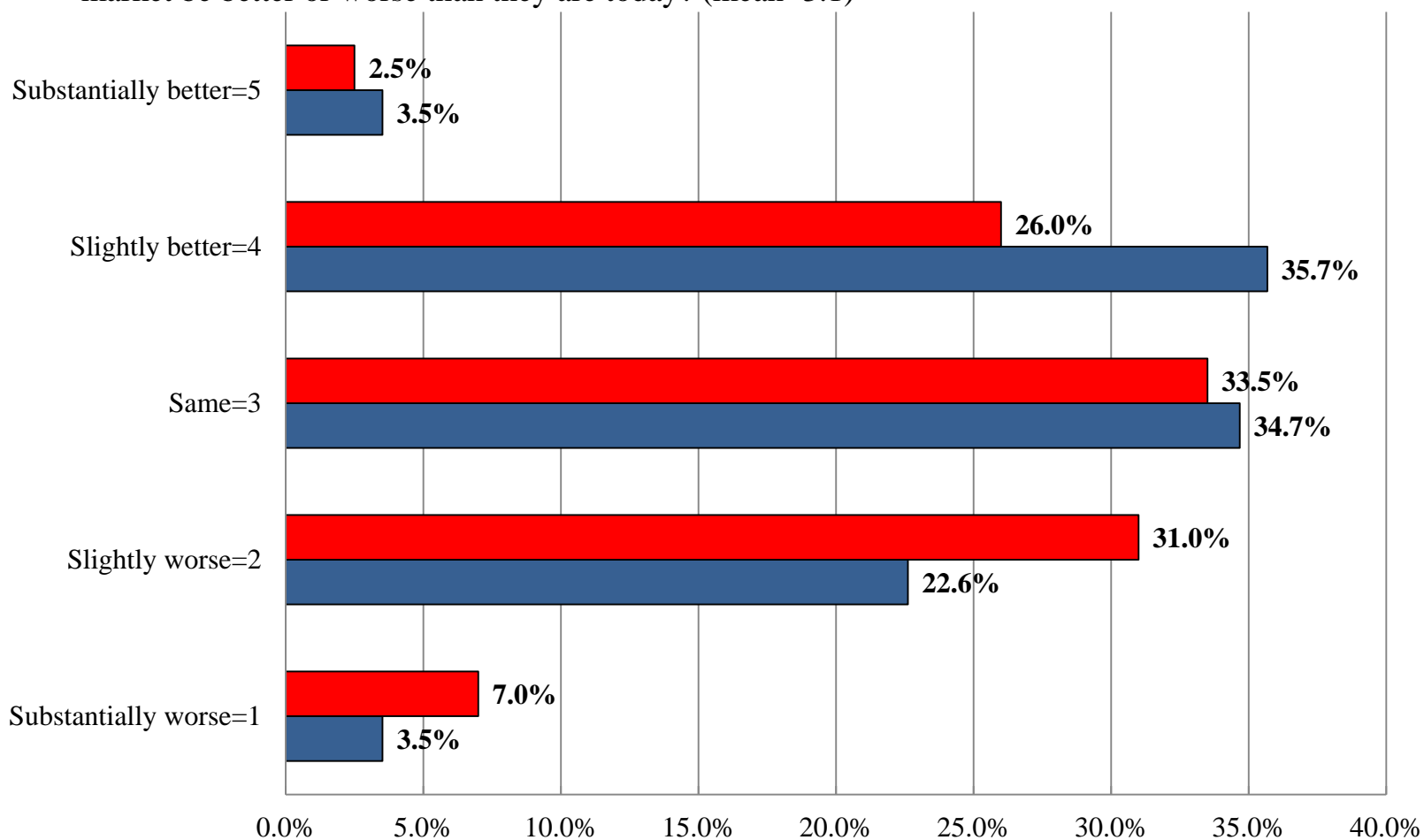
# Arts leaders continue to have a brighter outlook on future cultural sector conditions in their local markets



■ Are overall conditions for the cultural sector in your local market better or worse today than they were a year ago? (mean=2.9)

■ 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=3.1)

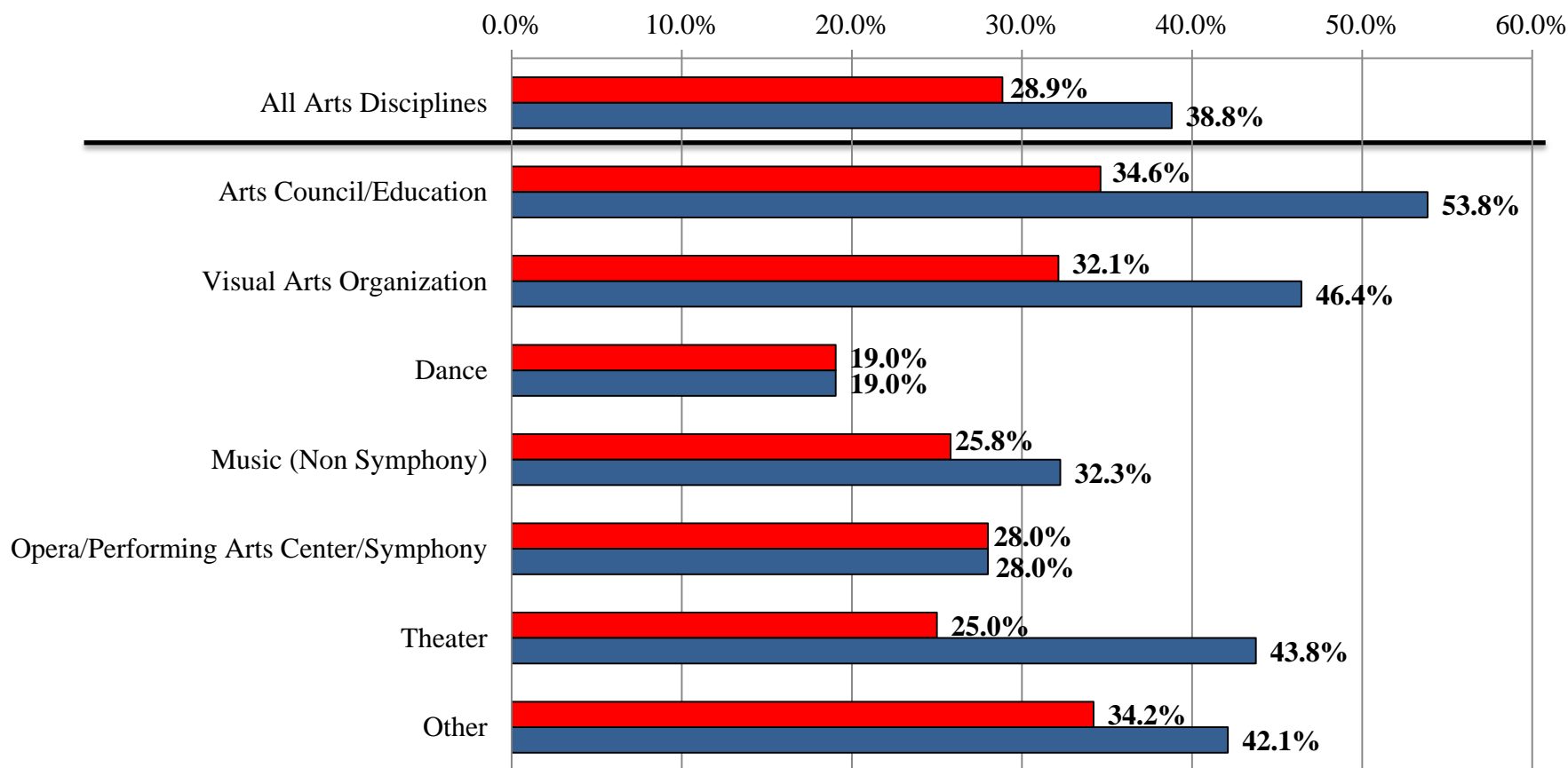
**Figure 1.1:**





## Dance and Opera/Performing Arts Centers/Symphonies have a stagnant view on future conditions while all other sectors see a brighter future in their local market

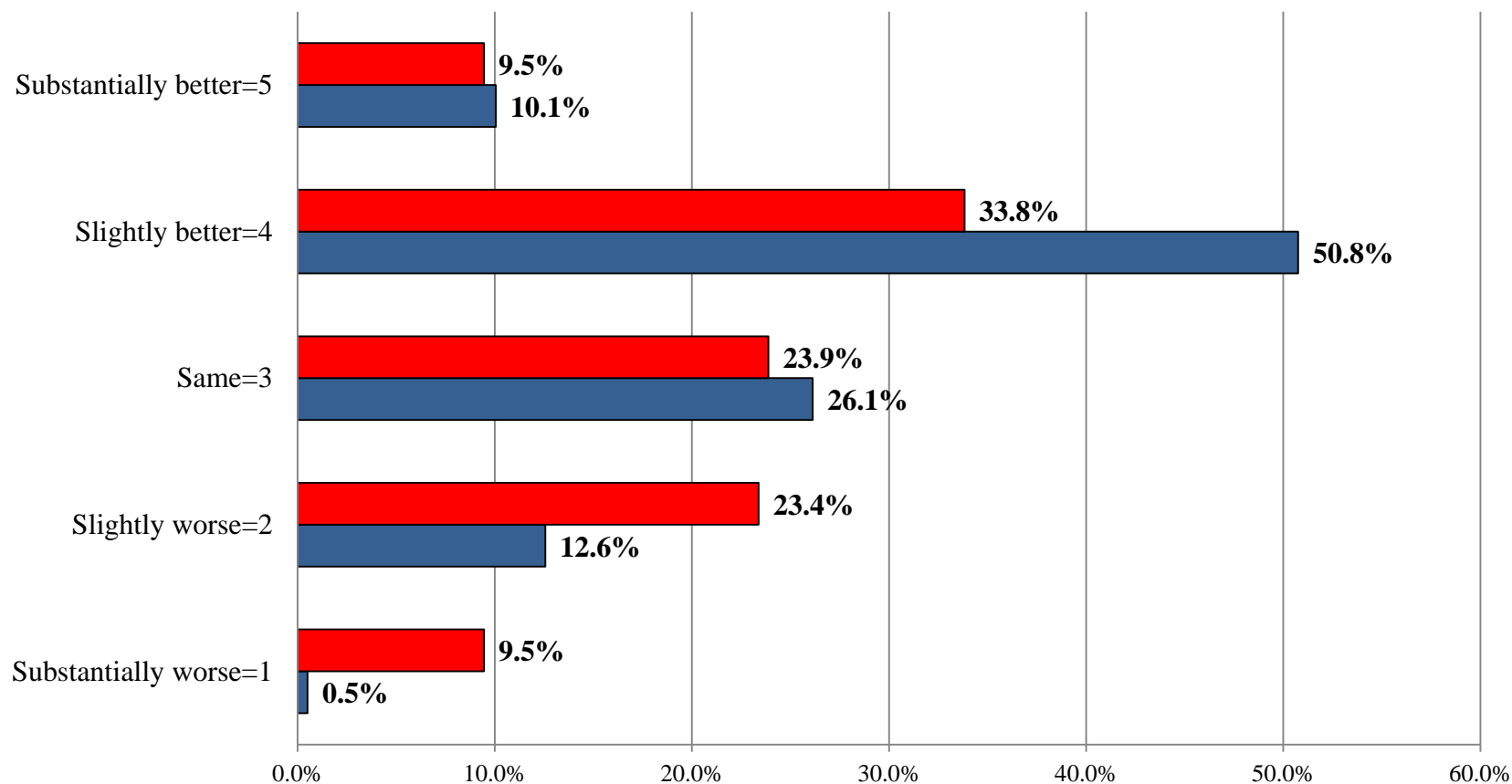
**Figure 1.2:** ■ Percent who perceive the overall conditions for the cultural sector in their local market today as being slightly or substantially better than they were a year ago  
 ■ Percent who believe that a year from now the overall conditions for the cultural sector in their local market will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





## The majority of leaders are optimistic about future attendance and their expectations about attendance in the most recent fiscal year were fairly on target.

**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=3.6)

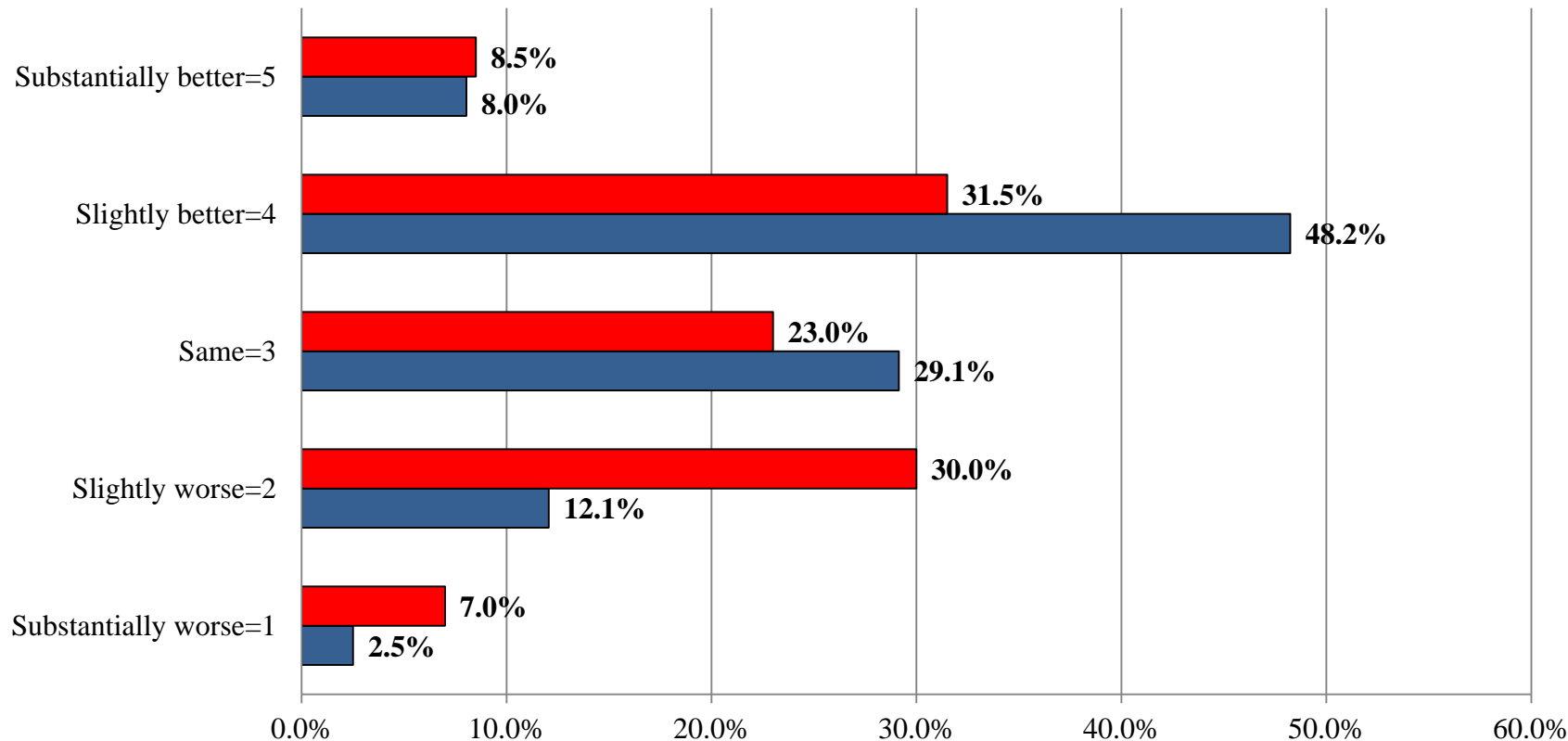


# Even with performance on earned revenue falling short of expectations for 37.0% of managers, respondents are optimistic regarding earned revenue in the future



**Figure 3.1:** ■ How did earned revenue during your most recent fiscal year compare to your expectations? (mean=3.0)

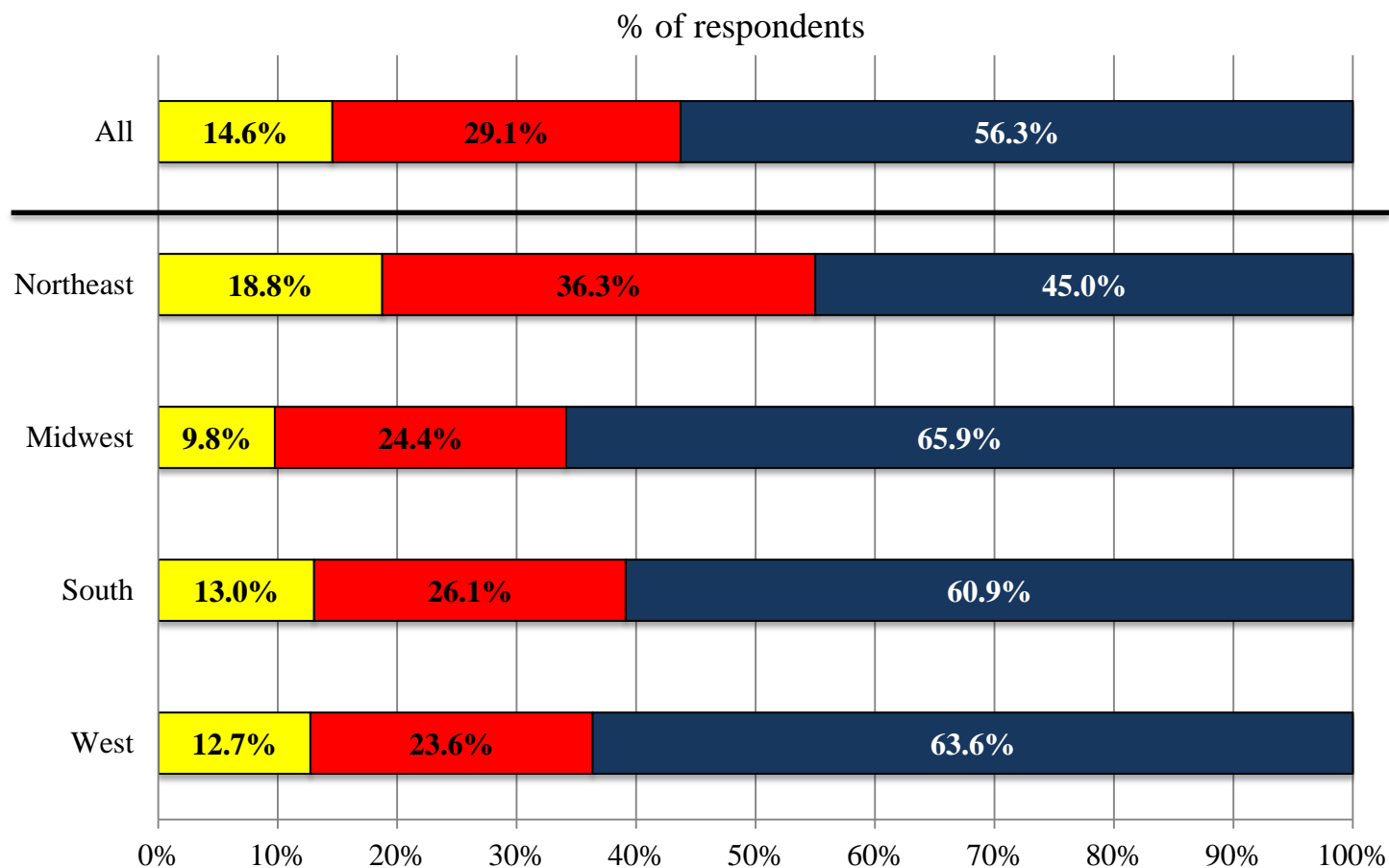
■ What are your projections for earned revenue this year compared to last year? (mean=3.5)



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



**Figure 3.2:** % Slightly or Substantially Worse % Stay the same % Slightly or Substantially Better

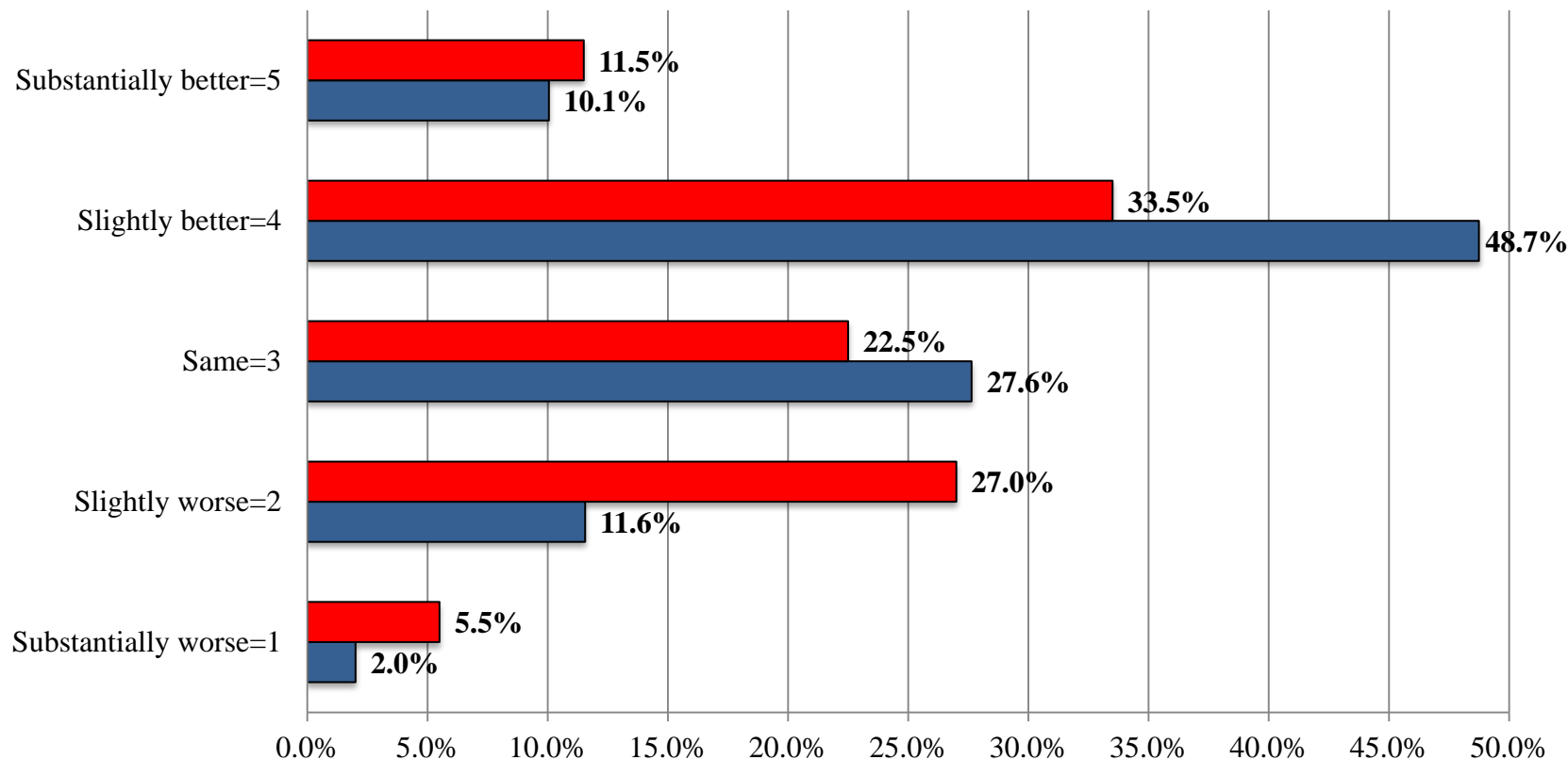






# The outlook for future contributed revenue is largely positive, and organizations' contributed revenue during the most recent fiscal year tended to exceed expectations

**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=3.5)

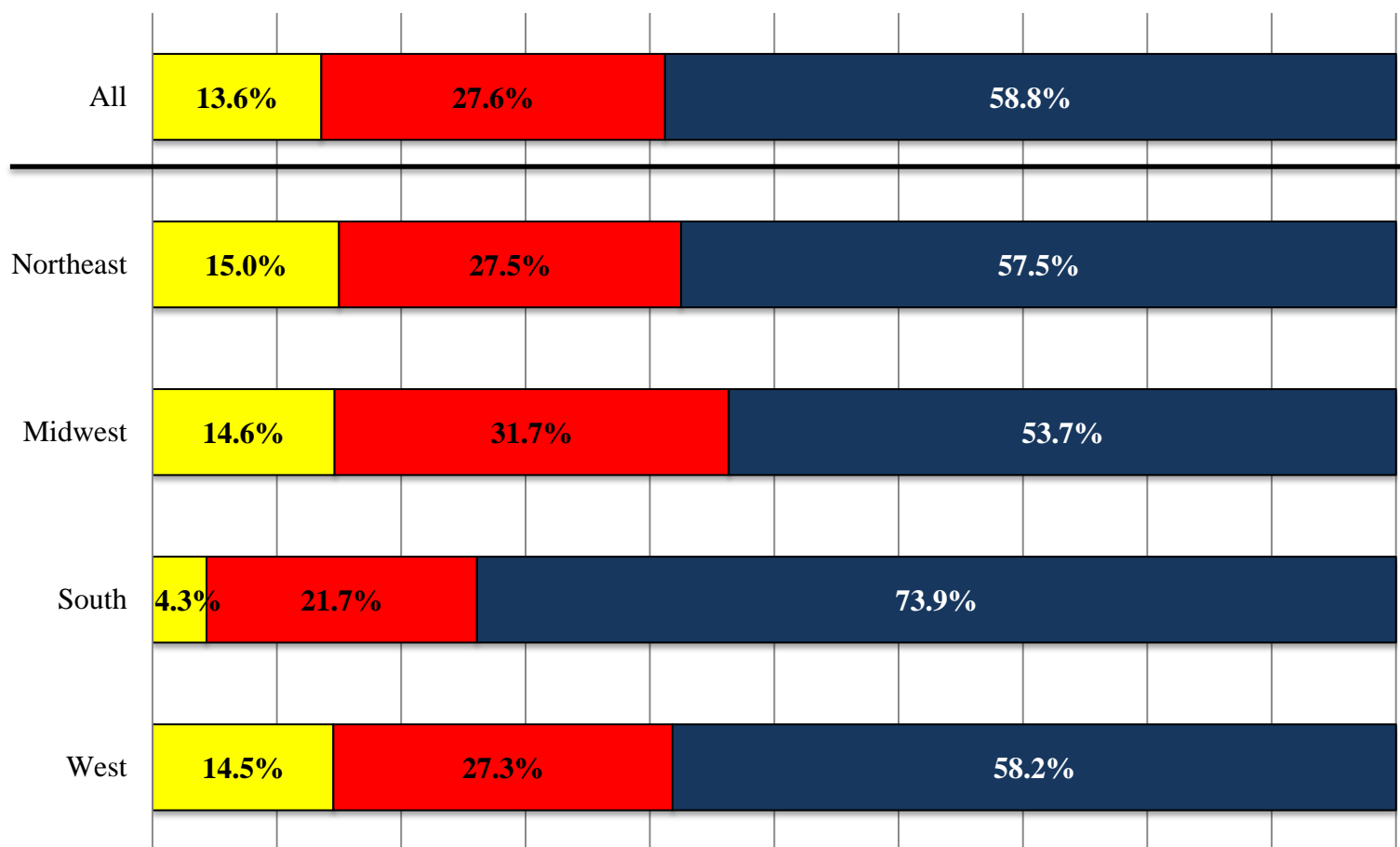


## Arts leaders in the South continue to be most optimistic about contributed revenue in the coming year



**Figure 4.2:**

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



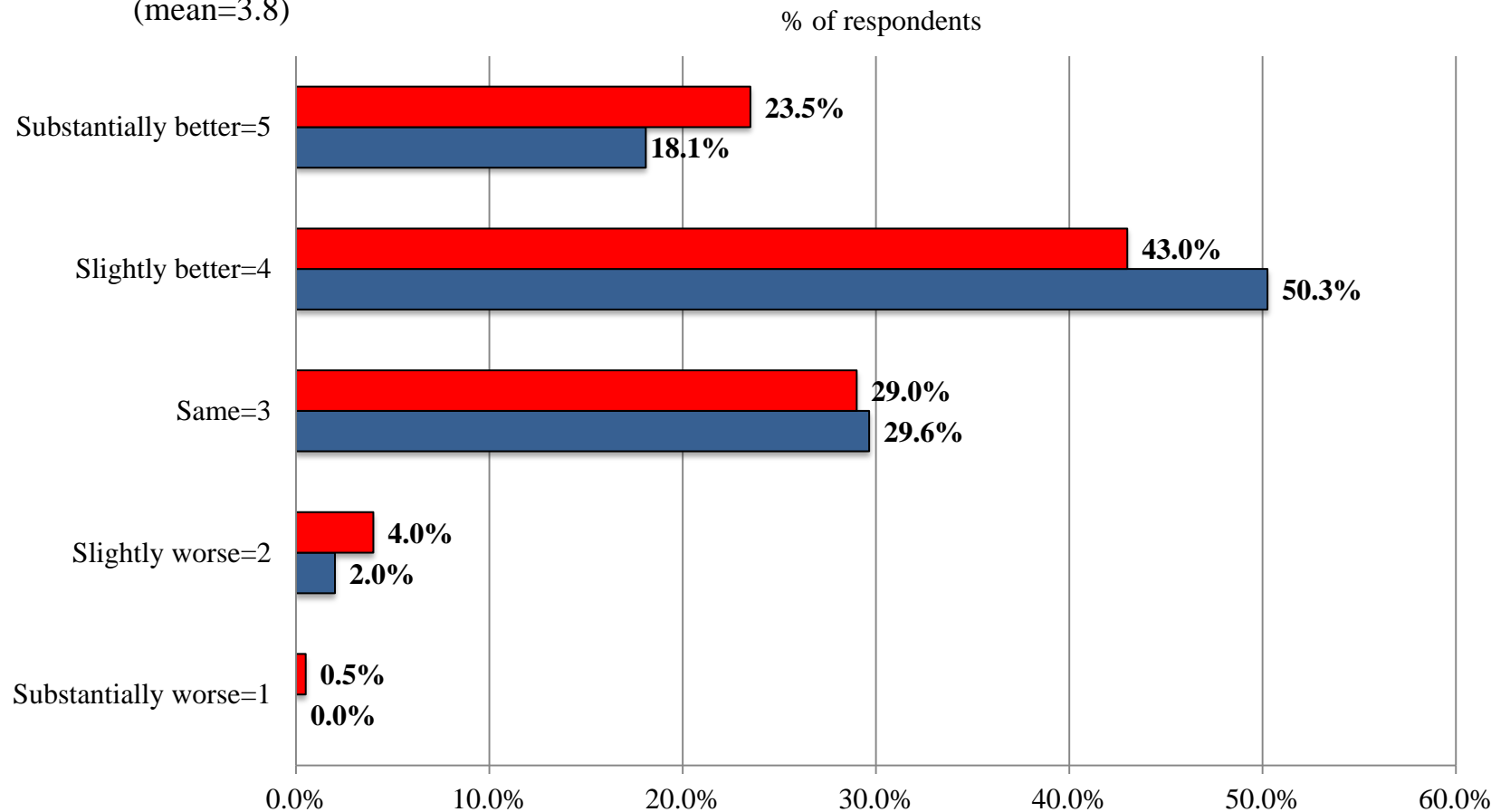
# Arts leaders tend to rate the quality of program offerings highly and expect that quality will continue to strengthen



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**Figure 5:**

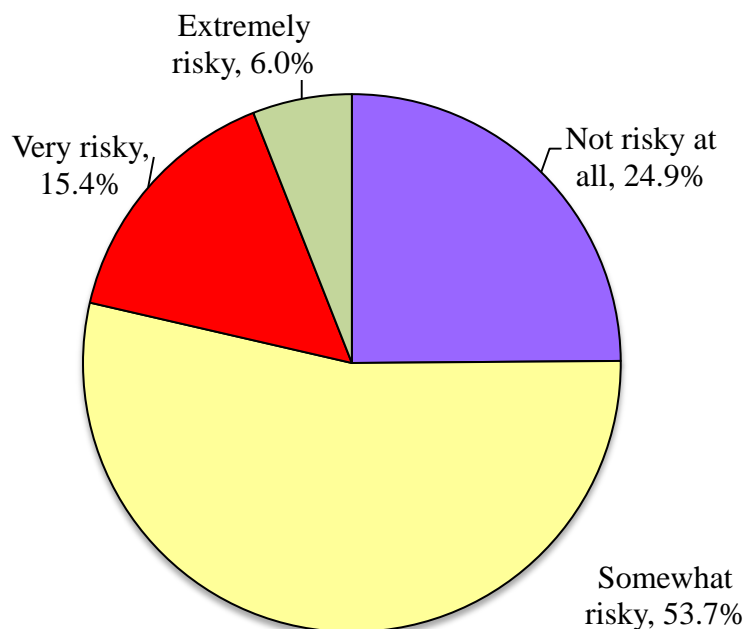
- How would you evaluate the actual quality of your program offerings during your most recent fiscal year compared to your expectations? (mean=3.9)
- What are your expectations for the quality of your program offerings this year compared to last year? (mean=3.8)



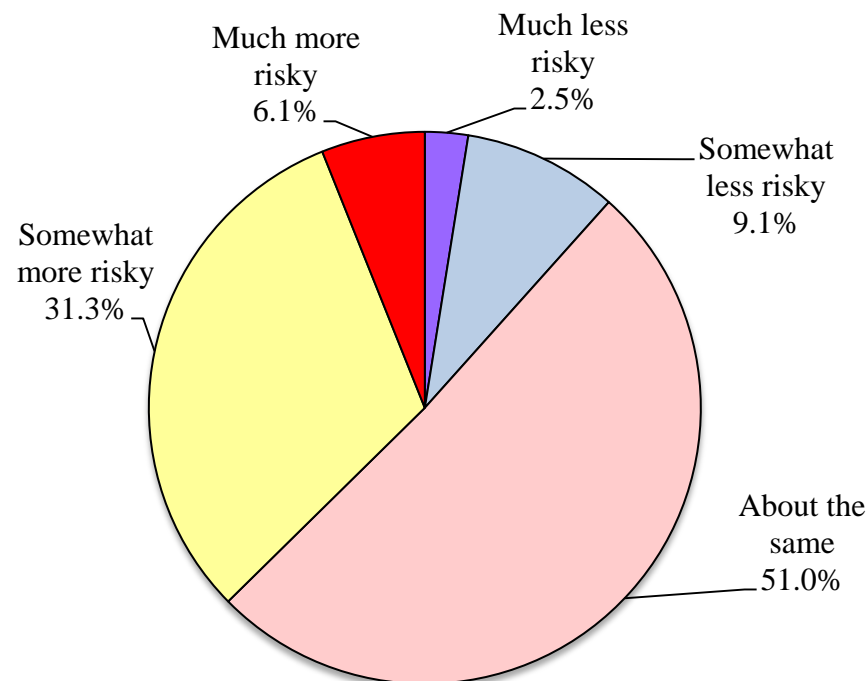
## Arts leaders plan to take risks at similar or higher levels compared with the past year



**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)



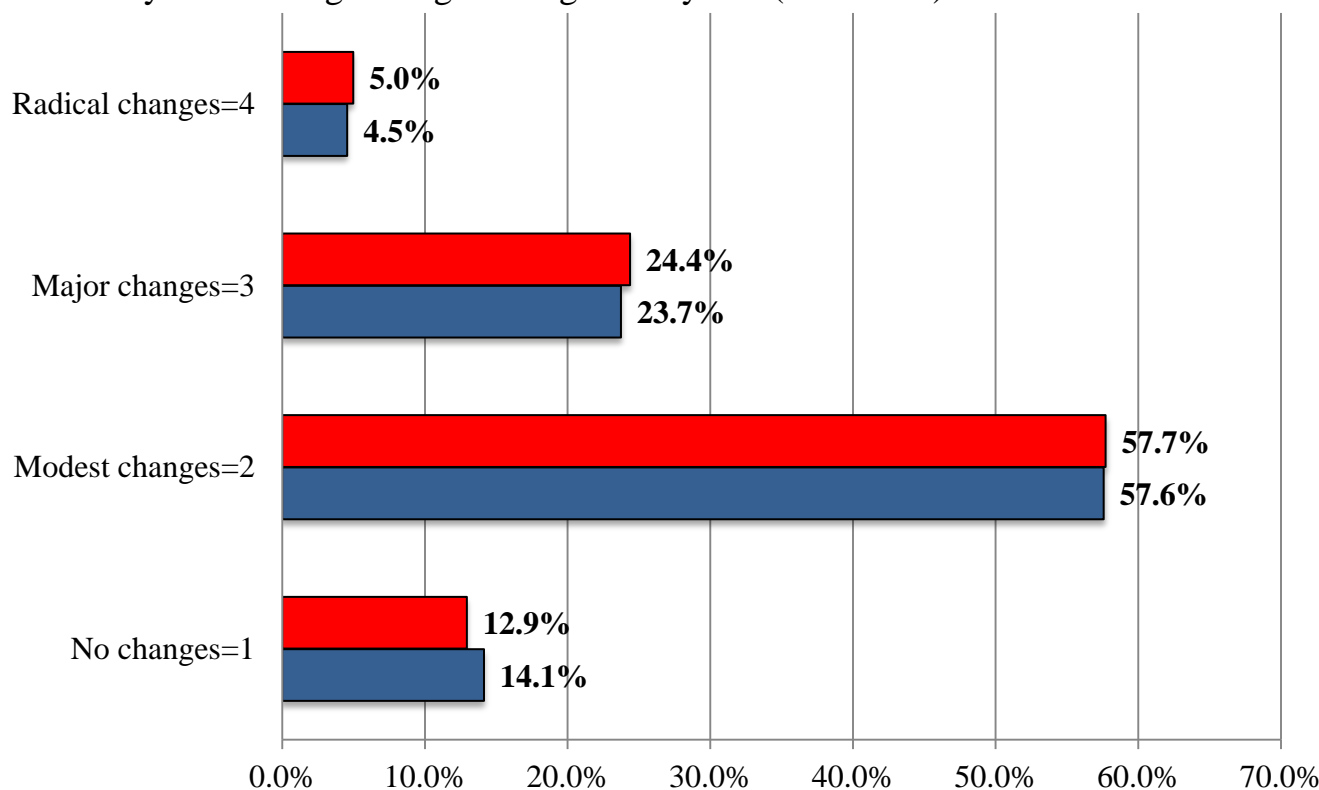
# Planned levels of strategic change in the coming year tend to mirror those of the past year, with a majority of organizations leaning towards modest changes



**Figure 7:**

■ Did you initiate strategic changes during your most recent fiscal year? (mean=2.2)

■ Are you initiating strategic changes this year? (mean=2.2)



# Participant Summary

## ARTS DISCIPLINE

<b>Theater</b>	16%
<b>Music (Non Symphony)</b>	15%
<b>Visual Arts Organization</b>	14%
<b>Arts Council/Education</b>	13%
<b>Opera/Performing Arts Center/Symphony</b>	12%
<b>Dance</b>	11%
<b>Other</b>	19%

## BUDGET SIZE

<b>Less than \$250,000</b>	50%
<b>\$250,000 - \$500,000</b>	16%
<b>\$500,000 - \$1 Million</b>	14%
<b>\$1 - \$2.99 Million</b>	11%
<b>Greater than \$3 Million</b>	9%

## REGION

<b>Northeast</b>	40%
<b>Midwest</b>	20%
<b>South</b>	12%
<b>West</b>	28%

## JOB TITLE

