Regenerating the Jazz Audience: A Segmentation Analysis of Jazz "Prospects" in Central Ohio

Jazz Audiences Initiative
Research commissioned by Jazz Arts Group
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Executive Summary

- As part of the larger study of jazz audiences nationwide, the Jazz Arts Initiative included a study of music lovers in the greater Columbus area in an effort to better under the prospective jazz audiences on a deeper level. This report serves as an appendix to the ticket buyer segmentation report. It covers results from this prospect survey effort, concentrating on a segmentation model of prospective jazz audiences.
- Data collection efforts yielded a large pool of approximately 1,900 respondents. After applying filters to weed out those who are uninterested in music (on the low end of the involvement spectrum) or who are already attending jazz with a relatively high frequency (on the high end), a pool of approximately 1,100 "qualified prospects" was left, (about 62% of the sample). All subsequent analysis, including segmentation, was conducted on these "qualified prospects."
- A cluster analysis was performed on a sub-set of attitudinal variables relating to experience with music, knowledge and interest in jazz, purchase decision factors, live arts attendance, jazz listening patterns and consumption. The clustering procedure groups prospects into discrete segments that are as different as possible across segments, and as similar as possible within each segment.
- After a number of iterations of the cluster analysis, a four-segment model was selected. Brief descriptions of each segment follow:
  - **Segment 1: Music Buffs (15%)** are most likely to be young single men who play an instrument, sing, perform and compose music. Typically already engaged in jazz activities, their knowledge level is high. However, they prefer not to define themselves by any one musical genre. The second youngest segment, you can find them surfing the Internet for Youtube videos, posting on blogs and Facebook, and listening to streaming radio. Most likely to be Initiators.
  - **Segment 2: Social Rockers (35%)** are the youngest of all the segments, with 34% under 34 years old, and about one-third under 28 years old. They prefer to go to events when they are asked by others (i.e., are most likely to be Responders). Although relatively knowledgeable about jazz, they would like to learn more and would probably go to more live jazz if the cost and scheduling barriers were surmounted. The are most likely to value 'making friends and creating social networks' and second most 'wired' of all segments.
  - **Segment 3: Arts Omnivores (21%)** are more likely to visit art museums and attend stage plays or Broadway musicals than jazz shows. Valuing learning about a diversity of cultures and being involved in social and political issues, their music preferences include folk and world music. They are the oldest of all segments and most likely to be engaged through interconnections between jazz and other arts events (especially classical music).
  - **Segment 4: Bluegrass 'n' Barefoot (29%)** are not likely to attend jazz on a regular basis, or even develop further interest in jazz. Their general musical tastes bend towards rock and country music. Thus, it may be possible to attract them to a bluegrass show, if marketed directly to them.
- Overall the segmentation analysis revealed a diversity of interest and experience with music in general, and jazz in particular. At least three musical pathways into jazz were discovered: 1) through rock and popular music; 2) through classical music, and 3) through country/folk/bluegrass music.

Executive Summary - Continued

- Although each of the four prospect segments may be considered a 'viable' population for audience development to some degree (they all expressed some level of interest in music, and wouldn't refuse a free ticket to a jazz concert), we feel it is most useful to view the prospect segments through the lens of what we call the "winnable middle ground." This framework allows us to classify prospects into three overarching types: 1) prospects who are already "won" (i.e., already engaged in jazz and easily drawn to jazz activities with little effort); 2) prospects in the "winnable middle ground" (i.e., those with a high interest in music and an interest in learning more about jazz, and who are likely to be attracted to jazz events through other pathways); and 3) prospects who are "lost" (i.e., those who have little interest in jazz and are unlikely to increase frequency of attendance or engagement in jazz activities).
- Whereas Music Buffs provide an obvious opportunity for audience development, they are already "won," and therefore will not require much effort to attract. They are artist-driven and will respond to the artists they want to see. As with the Knowledgeable Musicians segment of ticket buyers, Music Buffs will also be attracted to participatory activities that allow them to express their musical talents. On the other side of the spectrum, Bluegrass 'n' Barefoot prospects are most likely "lost" and unlikely to increase attendance or engagement in jazz. It would not be prudent to focus attention on either of these segments given the limited resources of most jazz presenters.
- However, the two middle segments, Social Rockers and Arts Omnivores, are hold good potential as new markets for Jazz Arts Group. In other words, these two segments represent the "winnable middle ground," but are extremely different with respect to desired outcomes and points of access:
  - Social Rockers, as their name suggests, are socially motivated and likely to attend events to which they are invited specifically. They are more likely to respond to informal settings where they can dance and socialize. They are also highly engaged in online social networking. Thus, "bring a friend," and happy hour type enhancement activities may yield success with this segment. Pop/rock/jazz crossover artists will be most appealing.
  - Arts Omnivores are interested in music, including classical music and musical theatre. They can be accessed through artists and venues that bridge other art forms with jazz. For example, late nights at the museums with jazz performances, or coordinating programming around Broadway shows like Jelly's Last Jam, or cabaret events, etc.
- In communicating with prospects, a shift in emphasis towards non-jazz vocabulary is implied (i.e., through the larger lens of music).
- The next steps in considering the tactical implications of there results include: 1) looking at 2011-12 artists through the lens of the prospect model and considering which programs might appeal to which segments; 2) considering future programming options (both live and digital, both participatory and attendance-based) in light of the prospect model.

Survey Methodology and Response

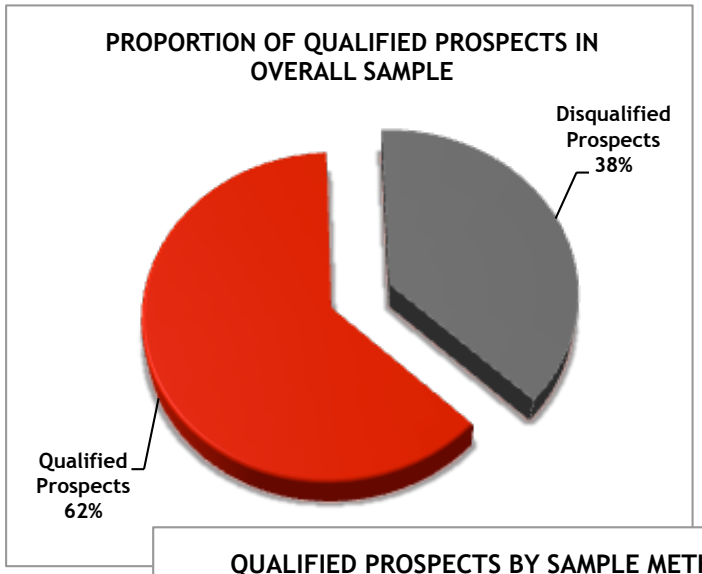
RESPONSE REPORT: PROSPECT SURVEY SAMPLING	Total # Emails Sent	Total # Received	Overall Response Rate
Intercepts	1,335	538	40%
Email Blasts	29,032	731	3%
Market Tools Panel		659	
GRAND TOTAL	**30,367**	**1,928**	**6%**

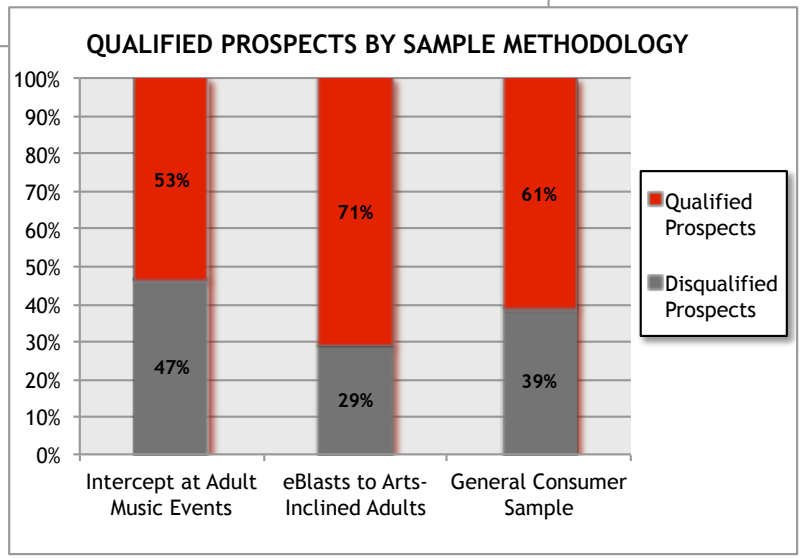
- The prospect survey protocol was designed in conjunction with the ticket buyer survey protocol. While the ticket buyer survey was administered in multiple locations across the U.S., the data collection effort for prospects focused on the greater Columbus area.
- The overall goal of the data collection effort was to secure a large pool of responses from adults who like music and have at least some interest in jazz, but do not currently attend jazz concerts with any frequency.
- Data collection occurred between July and November 2010, and involved a combination of convenience sampling approaches:
  - Intercept sampling: Jazz Arts Group staff and volunteers collected email addresses at local music events and venues around Columbus. A link to an online version of the survey was then sent by email to all addresses. A total of 538 completes were obtained by this method, for a 40% response rate.
  - Email Blasts: Approximately 30 local arts, social and community organizations and groups sent a link to the online survey to their email lists. A total of 731 responses were received through these e-blasts, for a 3% response rate.
  - Online Consumer Panel: In order to increase the sample size and to secure responses from people who are more representative of the general public, Jazz Arts Group purchased an online survey sample from MarketTools (Zoomerang), increasing the overall sample by 659 additional completed surveys from Columbus area adults, providing additional diversity to the sample.
- Overall, the combination of data collection efforts yielded a total sample size of 1,928.
- The various samples were aggregated into a single pool of respondents for further analysis and filtering.

Limitations of the Data

- There are several limitations to the survey methodology that restrict our ability to generalize from the results. Rather, the sample should be considered exploratory in nature.
  - Many of the intercept sites and email blast organizations were arts and music-related. Many of those who responded were already favorably predisposed to attend music events, and jazz in particular in the case of many of the intercept sites (e.g., Jazz and Ribs Fest). This resulted in a self-selection bias (i.e., a higher incidence of response from people already attending music and jazz events). While our goal was to find music-inclined adults, some of the people who took the prospect survey are already attending jazz concerts, and had to be excluded from the analysis.
  - The online survey panel purchased through MarketTools does not represent a random sample of adults, but rather a sample of adult consumers who have signed up to take surveys. These samples typically under-represent both very low income and very high income adults. For our purposes, however, the online sample is an excellent resource because respondents are not biased with respect to music consumption patterns.
  - Other biases may include age (as all of the surveying was done online), gender and income.
- In order to mitigate some of the bias from self-selection, and in order to winnow down the pool of respondents into a group of people who fit the profile of a jazz "prospect," several screener questions were incorporated into the survey protocol. Respondents were separated into "qualified" vs. "non-qualified" prospects based on their answers to these questions, and others related to jazz activity (see next page).
- Given these limitations, the results of this research should not be considered to represent the general population.

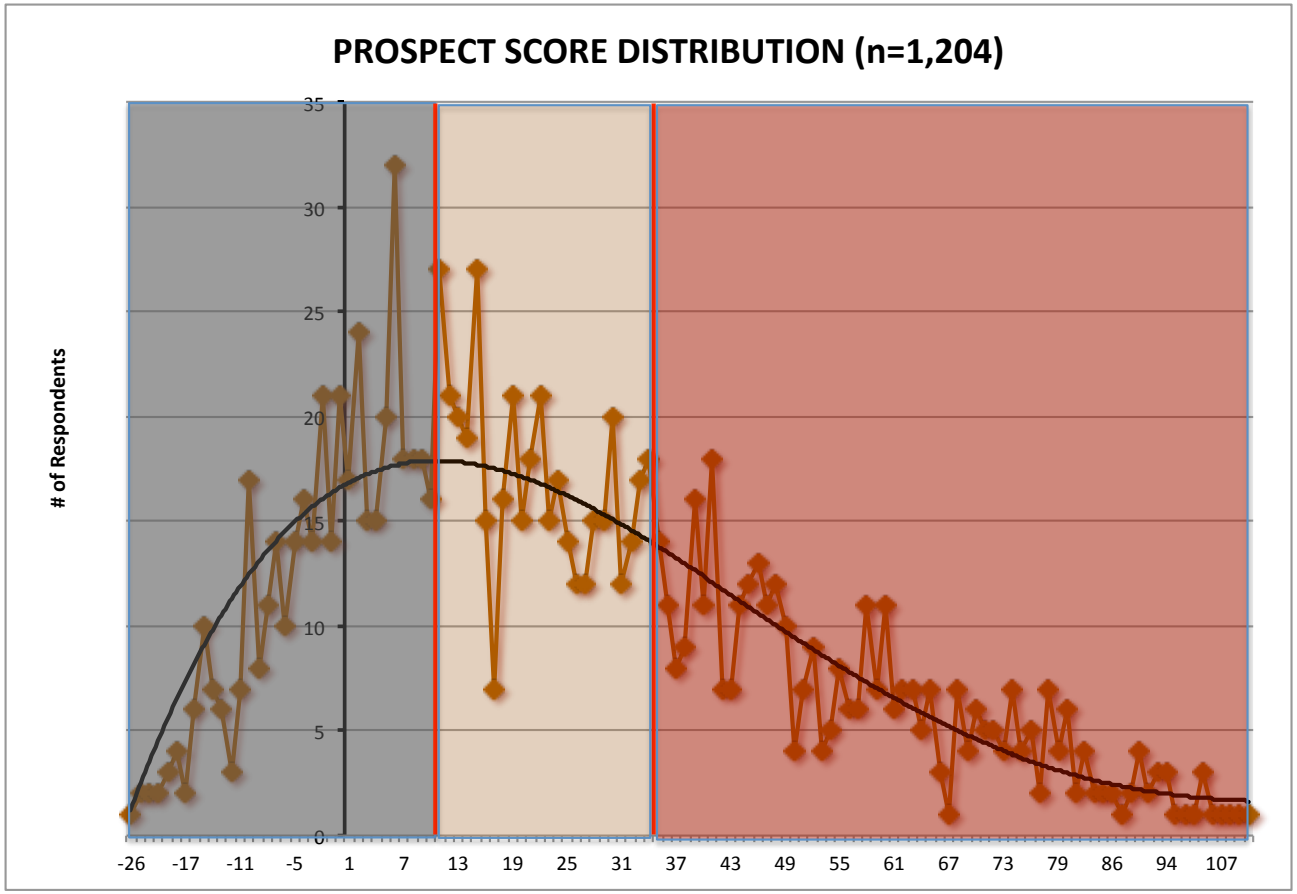
Qualifying Prospects





- Given the self-selection bias and diverse sources of data, it was expected that a certain proportion of respondents would either not qualify as prospects given their general lack of interest in music (i.e., they are not music lovers), or would already be active jazz consumers and therefore be ineligible by virtue of already demonstrating the desired consumption patterns.
- To weed out non-music lovers (on the low end) and identify those already attending jazz with some frequency (on the high end), several screener and "threshold" questions were included in the survey protocol. Respondents were categorized as "qualified" if they reported:
  - Moderate to high interest in doing a range of music activities (a score of 3 or higher on a Likert scale of 1 to 7)
  - They would attend a live jazz event if provided free tickets and an invitation from a friend/family member
  - Current frequency of attendance at live jazz events of two or less times a year over the past 12 months
- After applying these filters, a total of 62% of all respondents qualified as jazz prospects. Of the three data collection methods, the largest proportion of prospects was found in the e-blast samples (71%) while the lowest proportion was found in the intercept samples (53%).

Qualifying Prospects



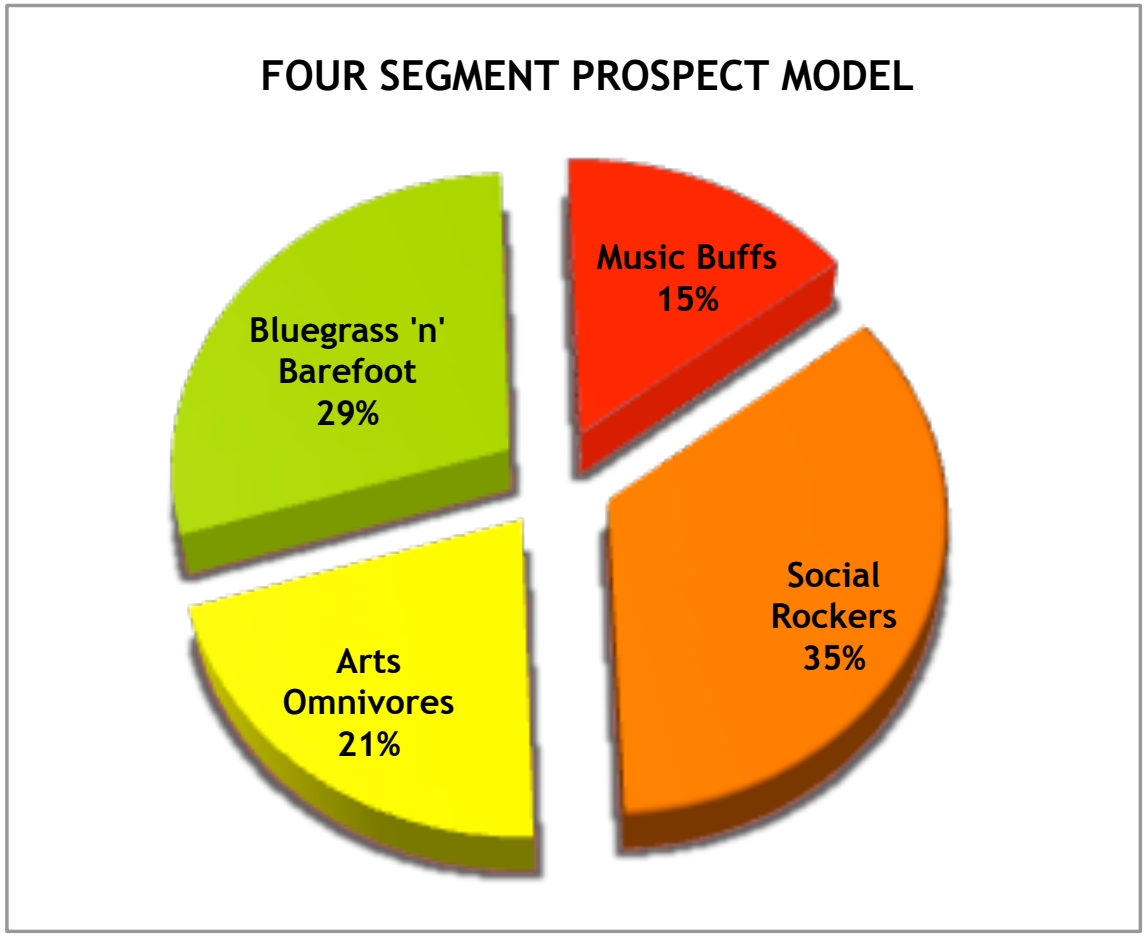
- Prospects were then scored for their propensity to exhibit pro-jazz attitudes and behaviors, in order to identify those who are "winnable" or most worthy of attention.
- Variables that went into scoring algorithm include:
  - How much they like listening to jazz
  - What proportion of their existing music collection is jazz
  - What proportion of new music buying is jazz
  - Whether or not they think jazz is too intellectual for their tastes, or is mostly background music (negative indicators, so those who think that jazz is too intellectual or simply background music received a negative score)
  - Their level of interest is in learning more about jazz
  - Their aspirations for attending more jazz in the future
- The chart at left illustrates the distribution of "jazz propensity" scores across the subset of qualified prospects. Results range from -26, signifying negative propensity, to +110, signifying very high propensity.
- The color coding signifies the breaks between three cohorts defined for the purposes of analysis: low propensity (<11), moderate (11-35) and high (>35). Note the long tail of high scores, suggesting a skew towards very high interest in jazz amongst a small number of respondents.

Segmentation Results

Cluster Analysis Methodology

- A cluster analysis was performed on the qualified prospect sample. The total number of cases involved in the cluster analysis was 1,137, as it was necessary to eliminate a small number of cases due to missing responses.
- Cluster analysis is a statistical technique used to group respondents into distinct segments based on a specific set of variables.
  - Development of a customer model is part art and part science. The "art" of the analysis lies in determining which variables are allowed into the cluster analysis, and how those variables are coded. The quality of the model depends heavily on the underlying quality of the protocol design. The analyst can also choose the number of segments in the preferred solution.
  - The "science" in the analysis lies in the statistical procedure used to group respondents into segments that are as different as possible across segments, and as similar as possible within segments.
  - Clustering is a not a perfect science; some respondents may have characteristics associated with several segments, but are assigned to the one segment which they most resemble.
- Four different iterations of clustering were run until an optimum, intuitive segmentation solution was achieved. A four-segment solution was chosen.
  - The three segment solution was discarded as not providing a sufficient level of discretion, while the five-segment solution produced an un-actionable segment.
- The four typologies of prospects outlined over the next few pages are based strictly on attitudinal data. The key variables driving the segmentation analysis are: relationship with music and jazz in particular, music preferences, venue preferences, knowledge and interest in jazz, jazz listening habits, purchase decision factors, interest in future jazz activities, initiator/responder status, and core values.
  - Demographic and purchase data were not allowed into the model, but are used to describe the segments and better understand what distinguishes one cluster from another.

Four-Segment Prospect Model



- As noted on the previous pages, three, four, and five-segment cluster solutions were considered as potential models.
- The four segment solution was chosen as the most actionable, revealing the diversity of attitudes towards jazz in the sample population, as well as allowing for two viable and promising segments to target for audience development.
- The segments are ordered by knowledge and connection to jazz, from Music Buffs (most knowledgeable) to Bluegrass 'n' Barefoot (least knowledgeable).
- This model is based on a sample of Columbus area adults and should not be considered applicable to other geographies. While some of the segments may be similar in other areas, the proportionality will almost certainly vary.
- Segment names are necessarily ambiguous and were designed to capture the essence of the segment.

Music Buffs (15%)

Tyler is a **Music Buff**. He plays in a band, often fronting as the lead singer, and has a regular monthly gig at the a local coffee house. A little more experienced and "settled" now that he's reached his thirties, he often gathers his friends together for a night out to see the new and cutting edge artists and bands. His knowledge and interest in learning more about jazz is high, but he doesn't like to define his musical tastes by any one genre. Tyler has been known for his provocative and thoughtful posts on local blogs and forums or his own Facebook page, and frequently surfs the Internet for cuts and videos of new music to continue his learning and development as a musician.

Key Characteristics of the Music Buff:

- Most likely of all segments to be male (52%)
- Second youngest segment with 29% under 34 years old, and 47% under 45
- Second most likely to be single, with 35% not married or partnered
- Most likely to be currently involved in music activities, playing, singing, performing and composing
- Most knowledgeable and interested of all segments; their loyalty is to the art form and the artist
- Most likely to make decisions based on the artist, and prefer clubs and lounges above other types of venues
- Most "wired" of all segments with top activities including 'watching videos online,' 'contributing to online blogs or forums,' and 'using social networking sites'

Social Rockers (35%)

Social Rocker Deena loves music, especially rock 'n' roll, hip hop and rap, and thus her pathway into jazz originates with the popular end of the music spectrum. She is a regular at clubs and music festivals, and often decides to go simply because someone asked, whether a friend or through a shared Facebook announcement. Relatively new to jazz, she is interested in learning more since discovering that some of her favorite jam bands have jazz backgrounds. She'd like to actually learn how to play, and would do more jazz activities if she could figure out a way to fit it into her schedule, or if tickets were less expensive.

Key Characteristics of Social Rockers:

- Most likely to be female (70%)
- Youngest of all segments with 34% under 35, and 57% under 45
- Second most engaged segment in music activities overall, behind Music Buffs, with focus on 'online' or computer-based activities (e.g., 'DJ'ing or creating playlists or mixes')
- Most price sensitive of all segments
- Most likely to learn about music from movie or TV soundtracks
- Most likely to be 'responders' ('more likely to go if someone else invites me'), and thus often require a social stimulus
- Opportunities to engage this segment will be through social opportunities and connections to rock and hip hop music, such as jam bands like Soulive, and online-based activities (e.g., sharing playlists)

Arts Omnivores (21%)

Susan and Dan are **Arts Omnivores**. They just spent the weekend taking in the recent exhibition opening at The Wexner Art Museum and a performance at CATCO. Next weekend they plan on attending the Columbus Symphony for a matinee. Jazz is selectively part of their arts "diet," but not currently as much of a priority as are other arts activities. Currently, their music preferences lean towards classical, folk and world music, followed by jazz. They would probably go to concerts that feature crossover jazz artists like Hugh Masakela. Given their strong connection to music and the arts, they take an intellectual interest in the art form, and would be interested in attending a music appreciation class.

Key Characteristics of Arts Omnivores:

- Oldest segment with 66% over 55 years old, with 38% retired
- Most highly educated segment with 56% having Master's or above
- Most likely to frequently visit art museums and galleries, stage plays and Broadway musicals
- Second most interested in music activities in general, behind Music Buffs
- Low proportion of jazz in music collection or new music purchases, and general jazz listening low in comparison to Music Buffs and Social Rockers
- Satisfied with amount of jazz activities; however, 10% are interested in doing more
- Value a seeking out and learning about different world cultures, as well as 'being involved in social, political and environmental causes'
- Opportunity for engaging this segment lies in making connections to other art and music forms

Bluegrass 'n' Barefoot (29%)

Bluegrass 'n' Barefoot, Darryl and Laura grew up listening to country and bluegrass. They've gone to a few jazz concerts, but mostly because someone else invited them. Generally, they have little interest in learning more about jazz and are satisfied with the amount of jazz activities they do, as infrequently as they may be. They often make decisions based on cost, given their family obligations.

Key Characteristics of Bluegrass 'n' Barefoot:

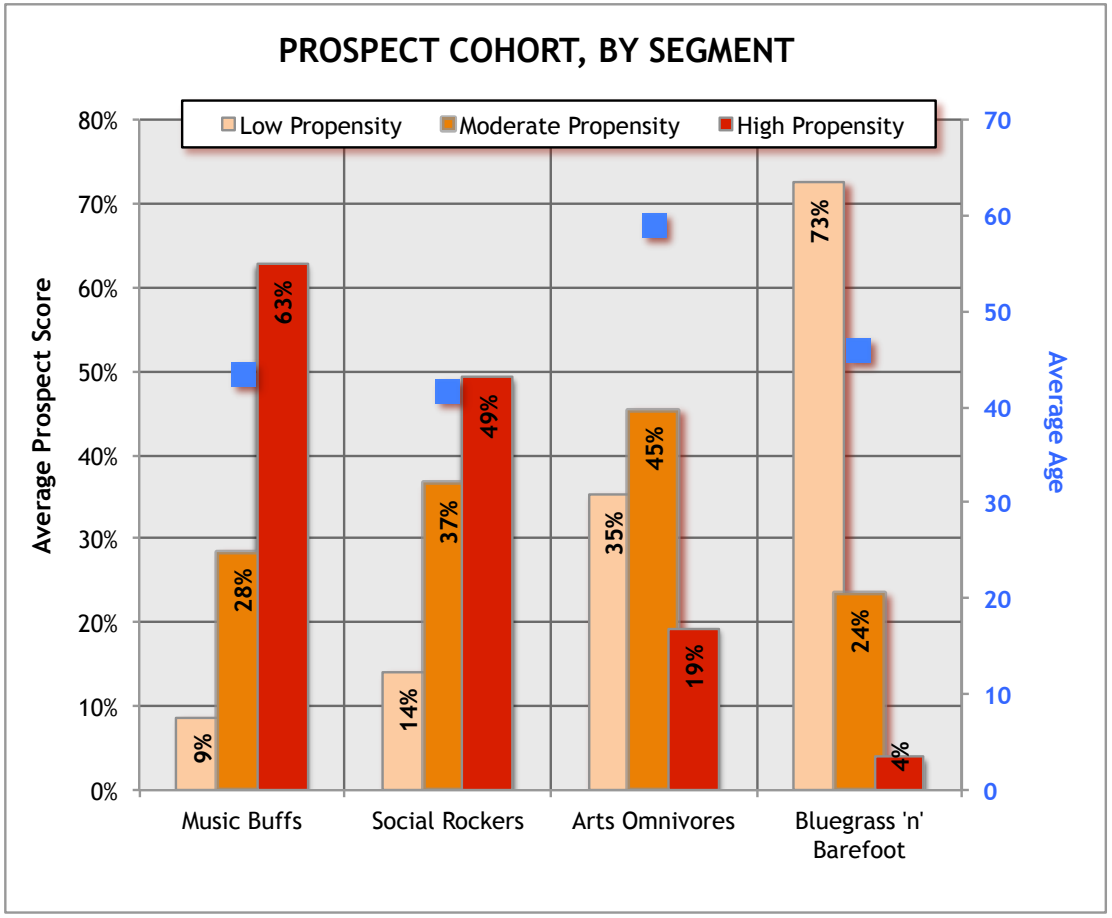
- Third youngest segment with 22% under 34 years old and 46% under 45
- Although by small margins, they are most likely to have children under 18 years old (1.6 children)
- Relatively low level of current involvement in music, although they are actively downloading
- Lowest prospect score and involvement in music activities
- Second most price sensitive of all segments
- Lowest knowledge level and lowest interest in learning more about jazz
- Most likely to be satisfied with the amount of jazz activities they are currently doing
- Most likely to value 'having a spiritual life'
- Opportunity for engagement will mostly be reflected in specific programming that reflects music interests: country and rock

Demographic Characteristics

DEMOGRAPHICS BY SEGMENT (PROSPECT MODEL)	Total Ticket Buyer Sample	Total Prospect Sample	Prospect Segments: Music Buffs	Social Rockers	Arts Omnivores	Bluegrass 'n' Barefoot
Sample size (unweighted)	4,855	1,137	172	396	238	331
Gender						
Female	46%	64%	48%	70%	67%	63%
Male	54%	36%	**52%**	30%	33%	37%
Age						
18-34	7%	23%	**29%**	**34%**	4%	**22%**
35-44	10%	20%	**18%**	**23%**	9%	**24%**
45-54	25%	24%	26%	24%	21%	25%
55-64	35%	22%	21%	16%	**32%**	21%
65+	23%	11%	6%	3%	**34%**	8%
Race						
White/Caucasian	79%	89%	86%	84%	96%	92%
Not-White	21%	11%	14%	16%	4%	8%
Educational Attainment						
High school graduate or G.E.D.	3%	7%	4%	5%	3%	15%
Some college, no degree	12%	16%	12%	18%	9%	21%
Associate or Vocational Degree	6%	8%	2%	9%	3%	14%
Bachelor's Degree	32%	36%	37%	41%	30%	33%
Master's Degree	30%	22%	32%	19%	37%	12%
Professional Degree	17%	10%	12%	8%	19%	5%
Work Status (multiple responses allowed)						
Working full-time	57%	57%	56%	66%	44%	55%
Working part-time	12%	14%	**22%**	15%	13%	10%
In school full-time	2%	5%	**10%**	5%	1%	4%
Not employed	4%	7%	8%	8%	3%	9%
Full-time Family Caregiver	2%	5%	1%	5%	4%	7%
Retired	26%	16%	9%	5%	**38%**	**17%**
Marital Status						
Married or partnered	71%	67%	65%	61%	72%	70%
Not married or partnered	29%	33%	**35%**	**39%**	28%	30%
Avg. # of Children Under 18						
Avg. # Children	0.26	1.49	1.46	1.53	1.26	**1.61**

- The table at left reports demographic characteristics by segment, and by the two main samples (ticket buyers vs. prospects).
- Overall, in comparison to the ticket buyer sample (gleaned from 19 different jazz organizations nationwide), the prospect sample is younger, more likely to be women (64% vs. 46% of ticket buyers), single, and to have children.
  - How can JAG engage such a different population of music lovers?
- Although demographic variables were not allowed into the cluster analysis, and therefore did not have any direct influence on the segment outcomes, it is interesting to note the distinct demographic breakdowns between segments:
  - About half of all Music Buffs are men
  - Three out of the four segments skew young, with about one-third of Social Rockers under 34 years old, and 29% of Music Buffs and 22% of Bluegrass 'n' Barefoot also under 34
  - Both Music Buffs and Social Rockers are most likely to be single (35% and 39%, respectively)

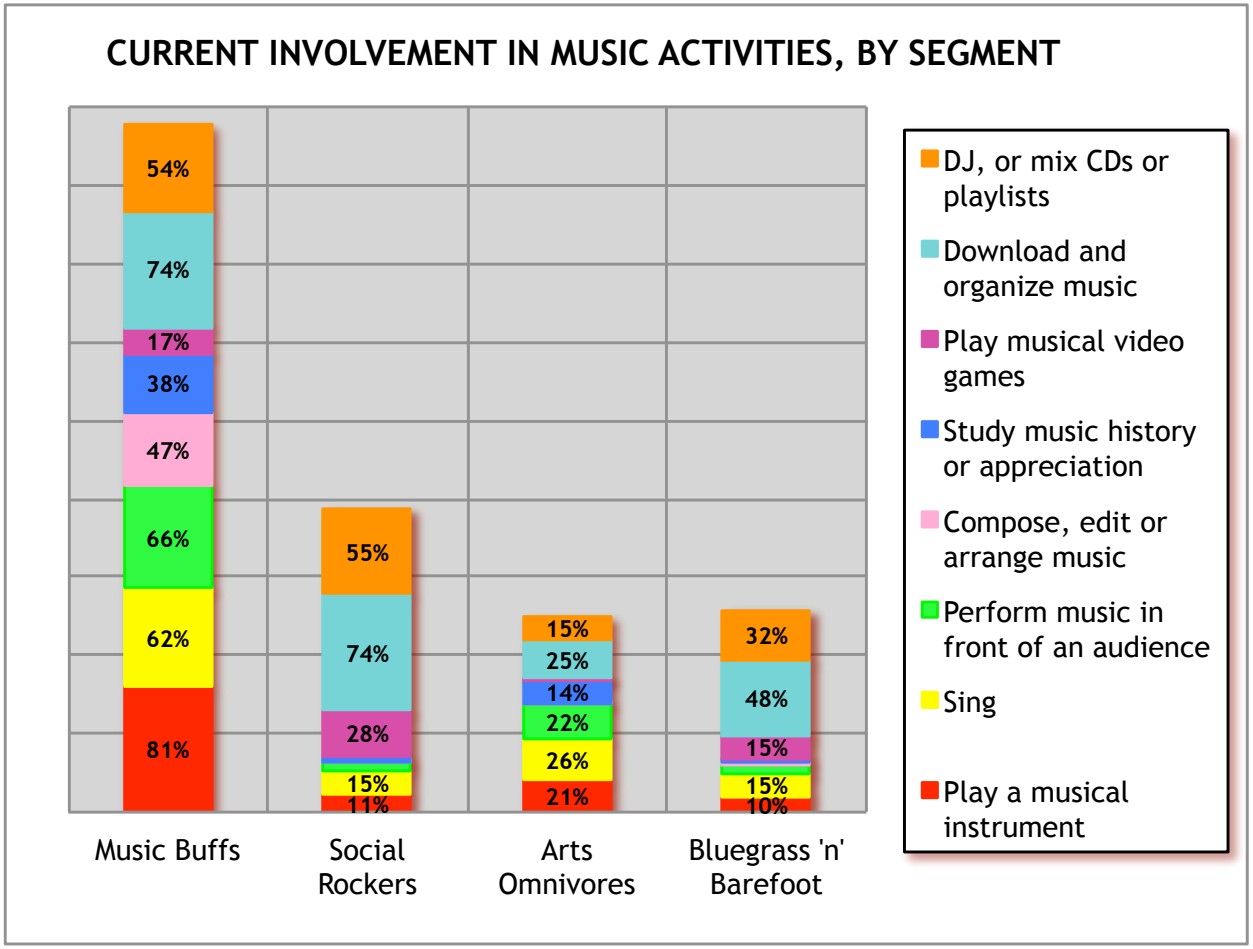
Prospect Cohort, by Segment



- The chart at left shows the average prospect score by segment (the left-hand vertical axis), in comparison with average age of each segment (blue dots, axis at right).
- The youngest segments, Music Buffs and Social Rockers, are most likely to be highly viable prospects (63% and 49%, respectively, in the high propensity prospect cohort). Note the significant drop between Social Rockers and Arts Omnivores, and another large gap between Arts Omnivores and Bluegrass 'n' Barefoot.
- Audience development efforts should focus on Music Buffs and Social Rockers, with a more limited focus on Arts Omnivores. Bluegrass 'n' Barefoot are probably served by free outdoor events.
- Findings by prospect cohort mirror this pattern amongst the different segments (e.g., High Propensity prospects look like Music Buffs and Social Rockers, on average).
  - What are the entrance pathways to jazz for different prospect levels, based on experience and depth of interest in music in general, and jazz in particular?

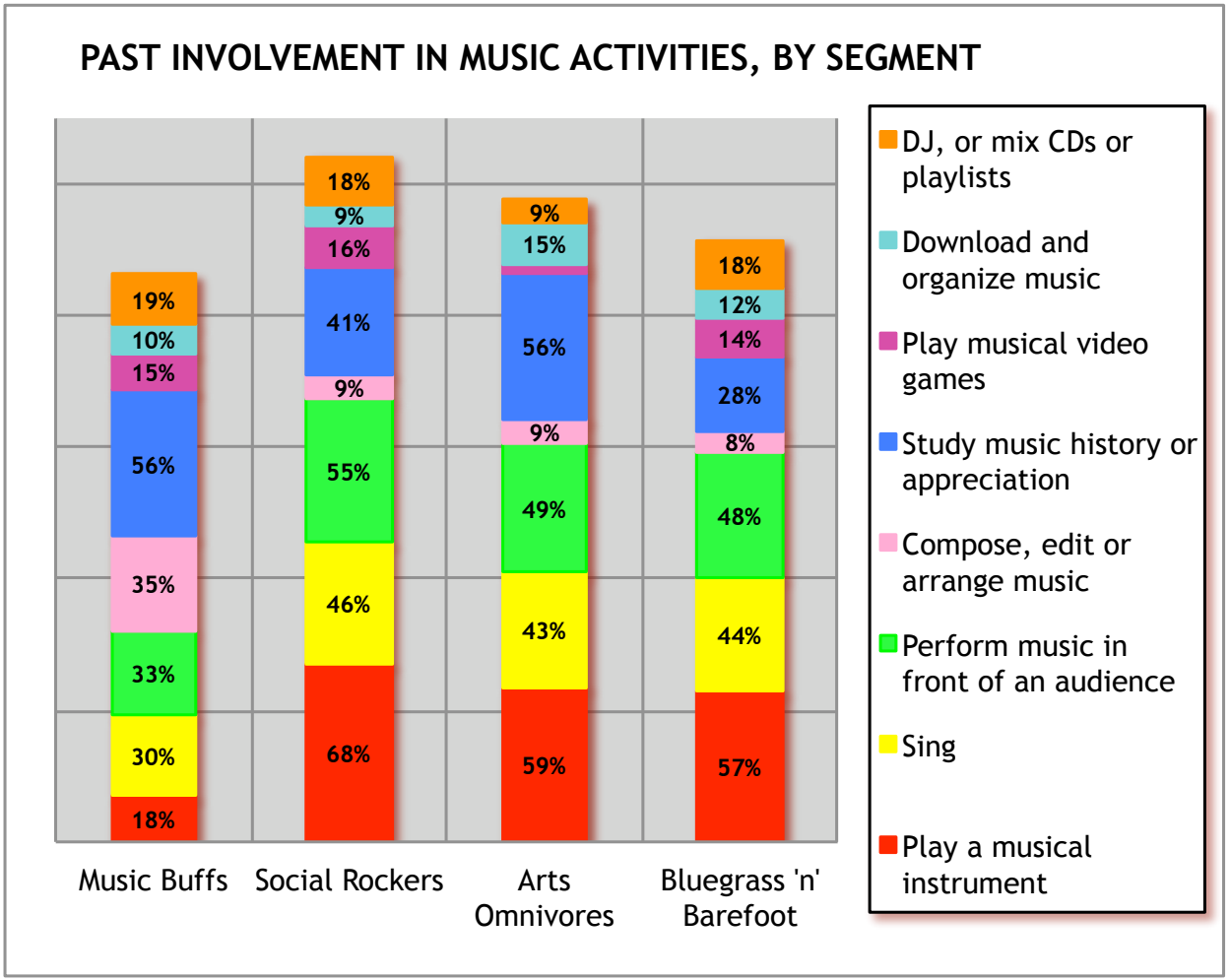
Relationship with Music

Current Involvement in Music Activities, by Segment



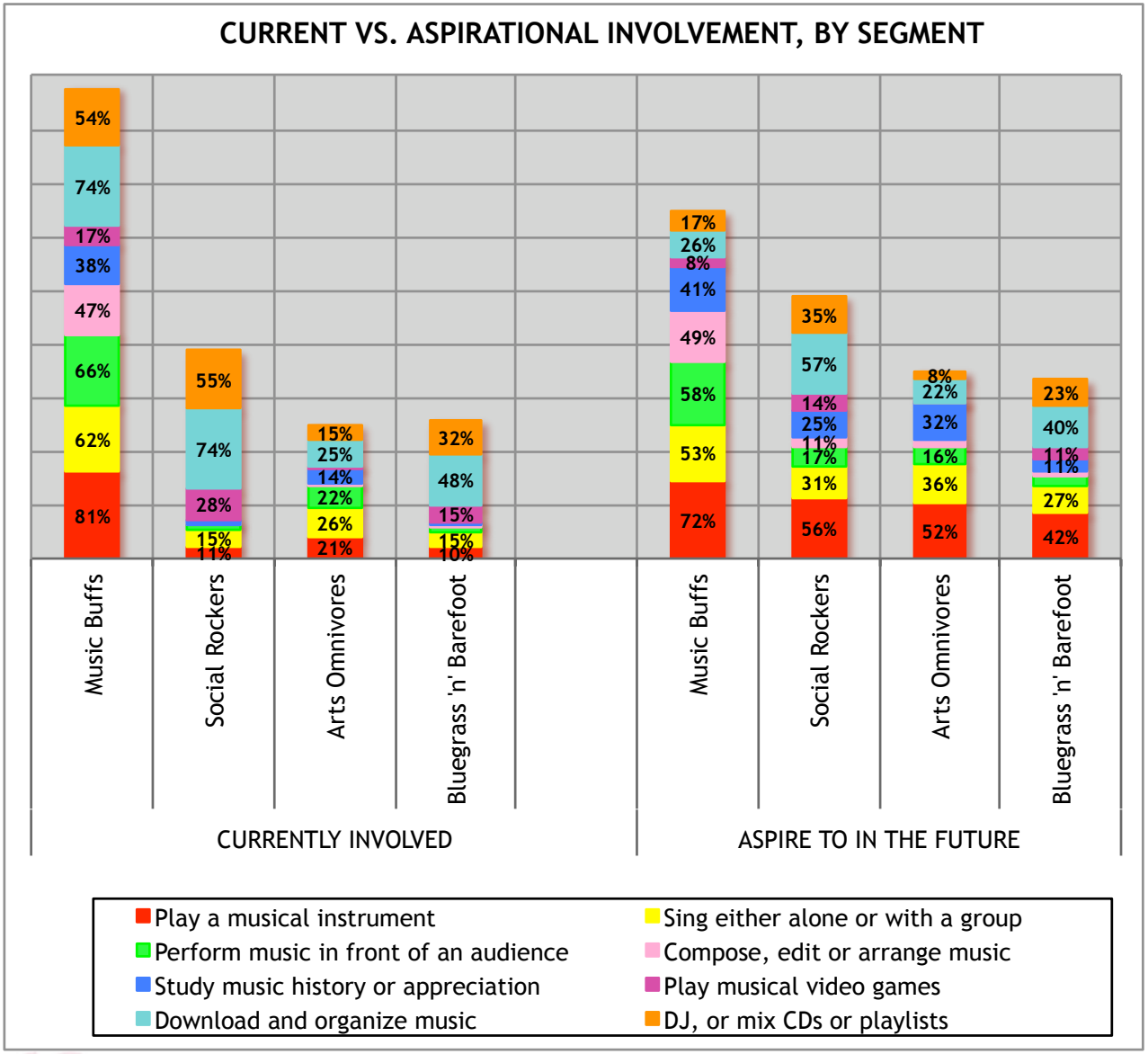
- Respondents were asked to indicate their current or past level of involvement in eight music activities. The chart at left reports the percentages of respondents who indicated current involvement (qualified prospects, by segment).
- By far, Music Buffs have the deepest connections to music. Over 80% play a musical instrument, and two thirds perform in front of audiences.
  - It seems quite clear that Music Buffs are looking for more participatory activities, where they can hone their musical talents. In this regard, they are similar to the Knowledgeable Musicians segment from the ticket buyer segmentation analysis.
- Three quarters of Social Rockers are downloading and organizing music, and might be accessed through distribution of digital jazz music.
  - They might show up at a lounge space where "Guest DJs" (i.e., regular patrons) are allowed to play their own jazz sets, and share music they like. They also might be served by an online tool or program that allows for patrons to create and share playlists.

Past Involvement in Music Activities, by Segment



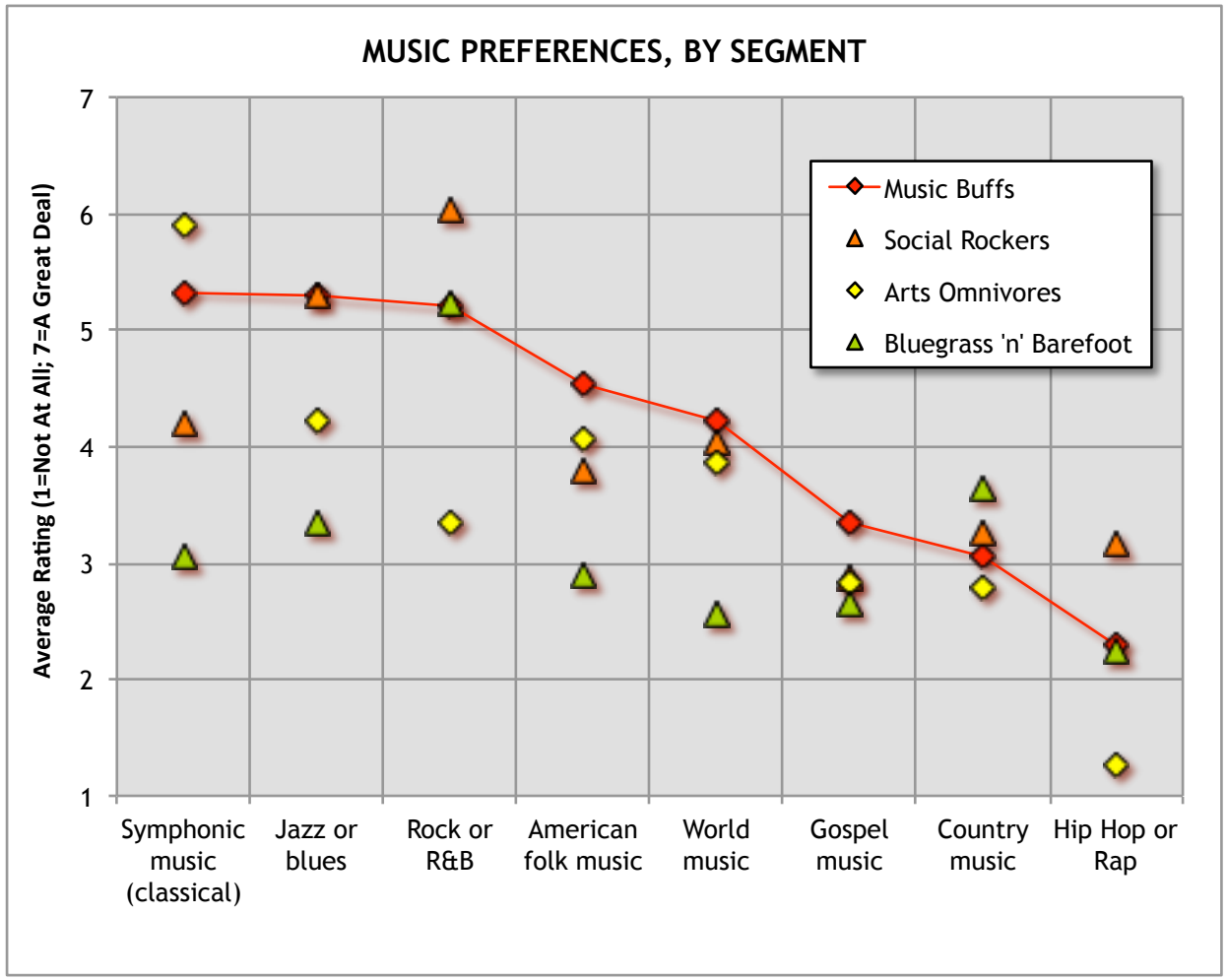
- Note the high levels of past involvement in activities across segments (with the exception of Music Buffs, who are currently active). All of these segments have a fairly substantial background in music, illustrating the importance of music education to adult interest and attendance.
- While almost all Music Buffs are either currently playing music or used to, two thirds Social Rockers used to play an instrument.
  - How might they be re-engaged in their music-making?

Current vs. Aspirational Involvement, by Segment



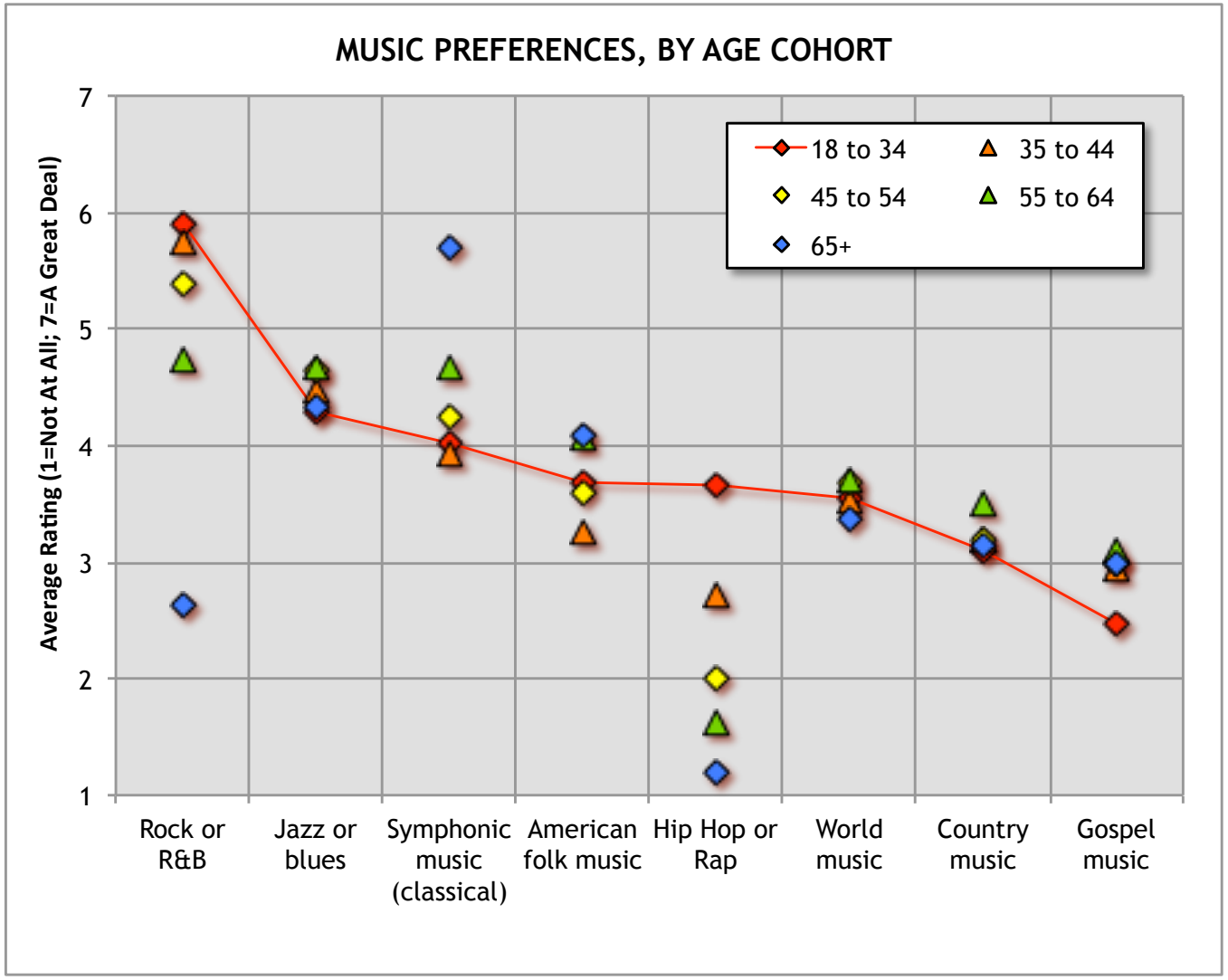
- Respondents were asked a follow-up question: "Which of the following activities would you like to do more often than you do now? (multiple responses allowed)
- The chart at left compares aggregated responses for current and aspirational involvement. By comparing the size of the bars in the two sets of columns, one can infer levels of "unfulfilled interest" in the various activities, especially "play a musical instrument."
- As might be expected, Music Buffs reported the highest levels of current involvement as well as the highest levels of aspirational involvement.
- However, Social Rockers also reported significant levels of aspirational involvement, especially for playing a musical instrument and downloading and organizing music.

Music Preferences, by Segment



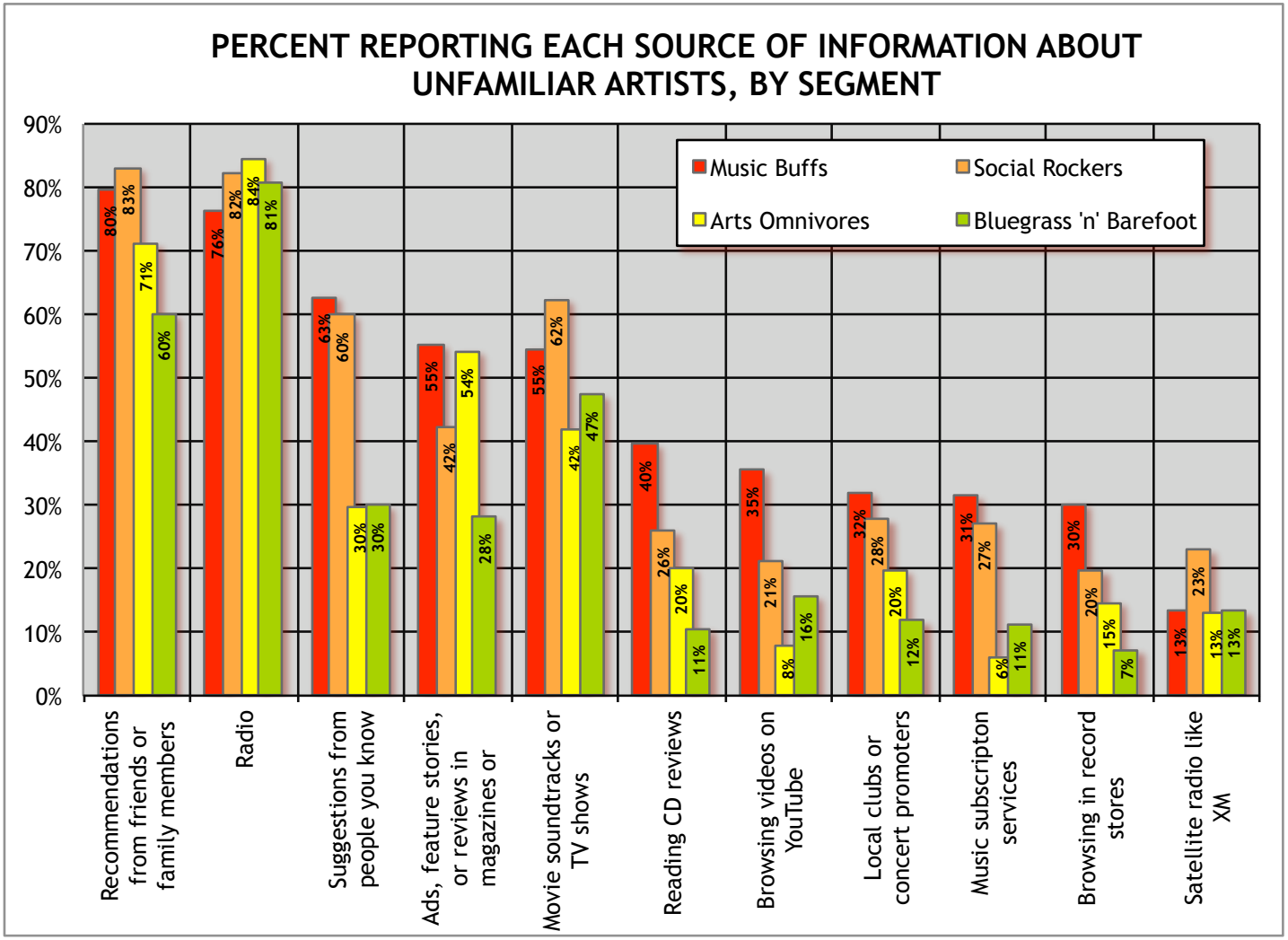
- Respondents were asked to rate their interest in eight different music genres. The chart at left illustrates average interest ratings by segment, ordered by the scores for Music Buffs.
- Results are intuitive. Arts Omnivores reported the highest interest in 'Symphonic Music,' suggesting one way that they can be accessed – through jazz/classical crossover events. Social Rockers, true to their name, reported the highest interest in 'Rock or R&B.'
- Note that Music Buffs and Social Rockers reported equal preferences for 'Jazz or Blues.'

Music Preferences, by Age Cohort



- Music preferences are analyzed here by age cohort to illustrate certain patterns.
- Note how jazz is the great bridge between generations, with nearly equal preference scores reported across the age cohorts.
- Other results are intuitive: 1) low interest in 'Rock or R&B' and higher interest in classical music amongst older respondents; 2) higher interest in 'Hip Hop or Rap' amongst younger respondents.
- It is interesting to note that 'Symphonic music' rates slightly higher than 'Hip Hop or Rap' amongst the 18-34 cohort.

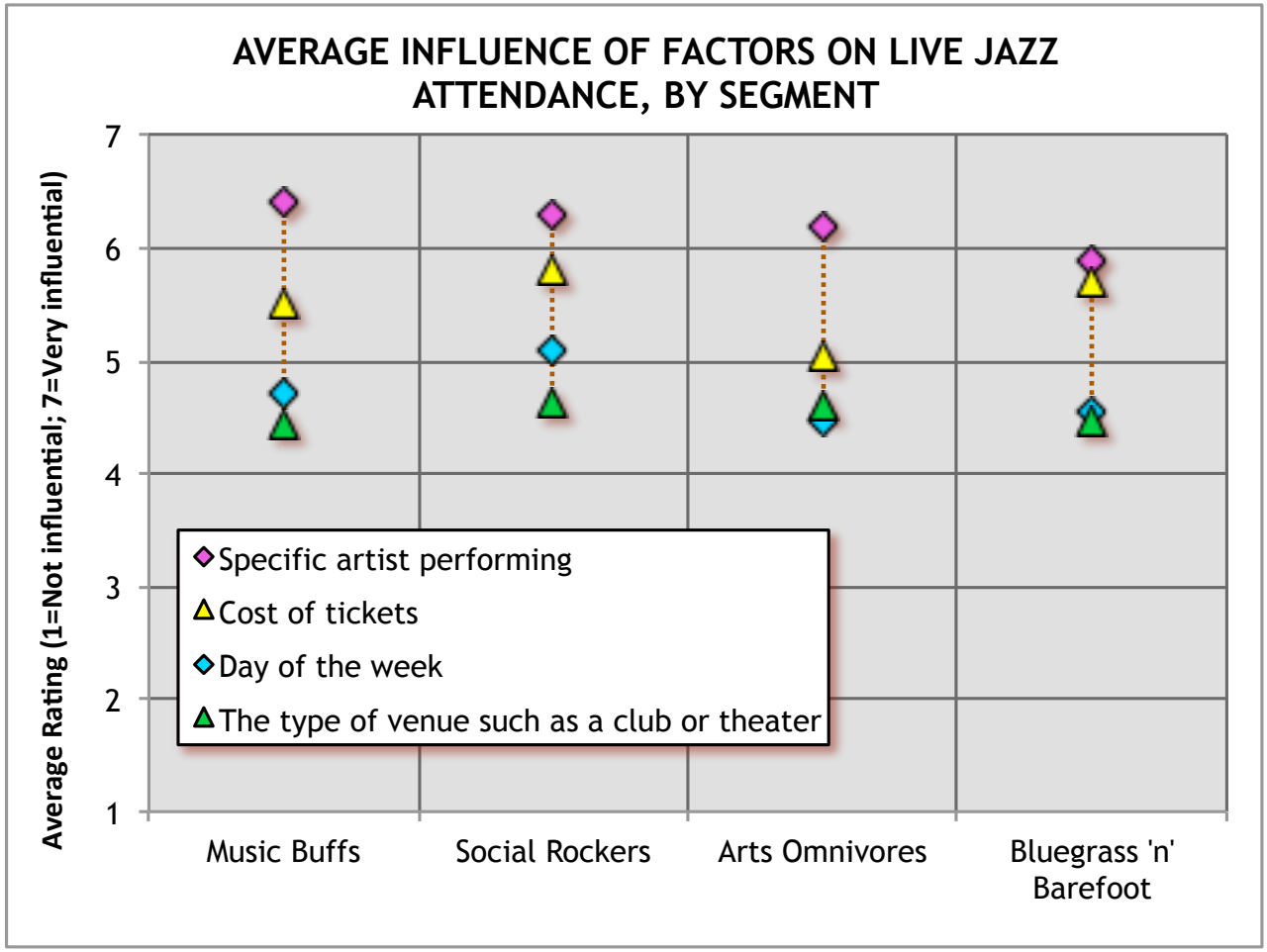
Information Sources about Unfamiliar Music Artists, by Segment



- Respondents were asked, "How do you discover new or unfamiliar music artists?" (multiple responses were allowed), in an effort to gain insight as to what catalyzes interest in new or unfamiliar artists.
- In general, Music Buffs and Social Rockers report more sources, as would be expected.
- Two sources dominate: 'Radio' and 'Recommendations from friends or family members' – once again demonstrating the finding from the music listening study that tastes are socially transmitted.
  - It seems that one of the most productive things that JAG might do for long-term audience development is to create a physical space for music listening, where friends can share music with friends, and therefore expand their musical tastes.
  - JAG might also consider how to recommend Internet radio channels to its audience members, in order to accelerate their arc of experience with jazz in between live concerts.

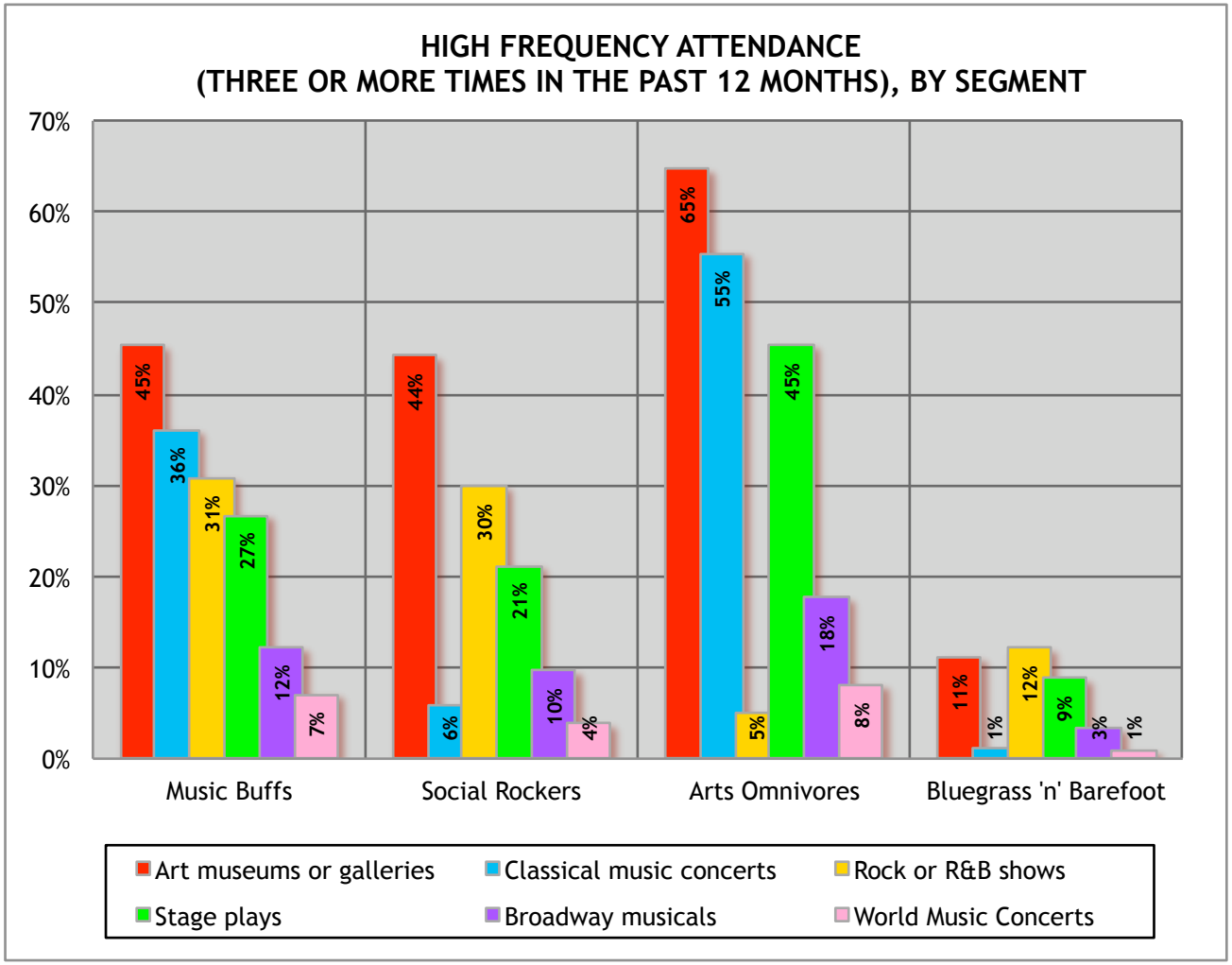
Purchase Decision Factors, Attendance Patterns and Venue Preferences

Influence of Purchase Decision Factors, by Segment



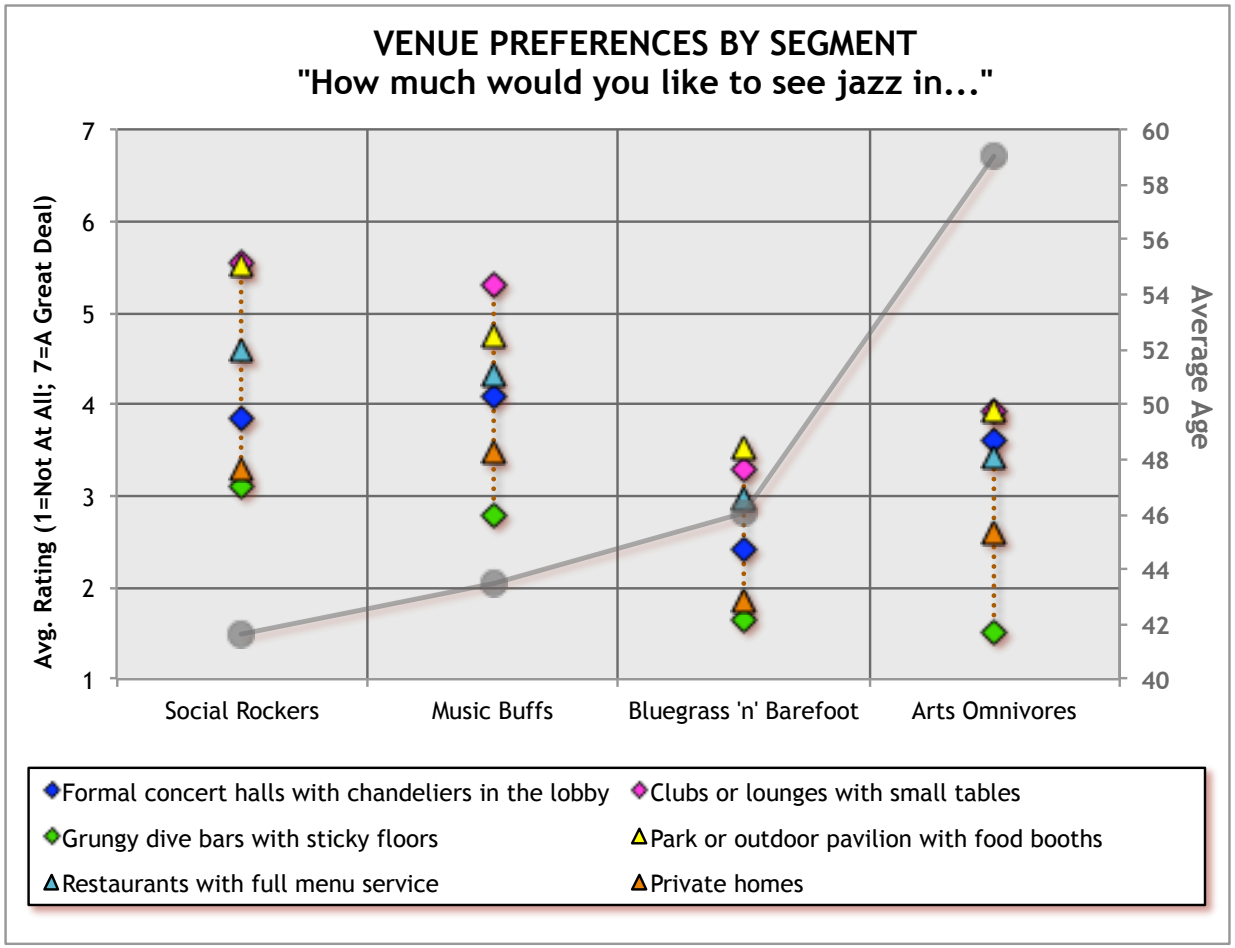
- To investigate the salience of key decision factors, respondents were asked, "How influential are each of the following factors in your decisions about whether to attend live music shows?" The chart at left shows results by segment.
- Similar to the ticket buyer sample, decisions are primarily made based on the artist performing. This is constant across all segments.
- Social Rockers and Bluegrass 'n' Barefoot are the most price sensitive segments, as well as the most likely to consider day of the week when making decisions, most likely a reflection of their busy social calendar.

Frequency of Attendance at Types of Arts Events, by Segment



- In order to gain a more complete picture of arts consumption patterns, respondents were asked to indicate their frequency of attendance a seven different types of arts programs. The chart at left reports proportion of respondents who reported attending each type of arts program three or more times in the past 12 months, by segment.
  - Note that jazz events were not included given that definition of prospects (see page nine) inherently limits frequency to two or less times.
- The most notable finding is how active Arts Omnivores are in attending a variety of different arts events, underscoring their diverse appetite for the arts. This is one of their defining characteristics and provides insight into how to engage members of this segment – by making connections to other art disciplines, such as visual or theatre arts.
- About three in ten Music Buffs and Social Rockers attend rock or R&B shows on a regular basis.
  - What kind of language would welcome and educate prospects about the crossover appeal of some jazz artists?

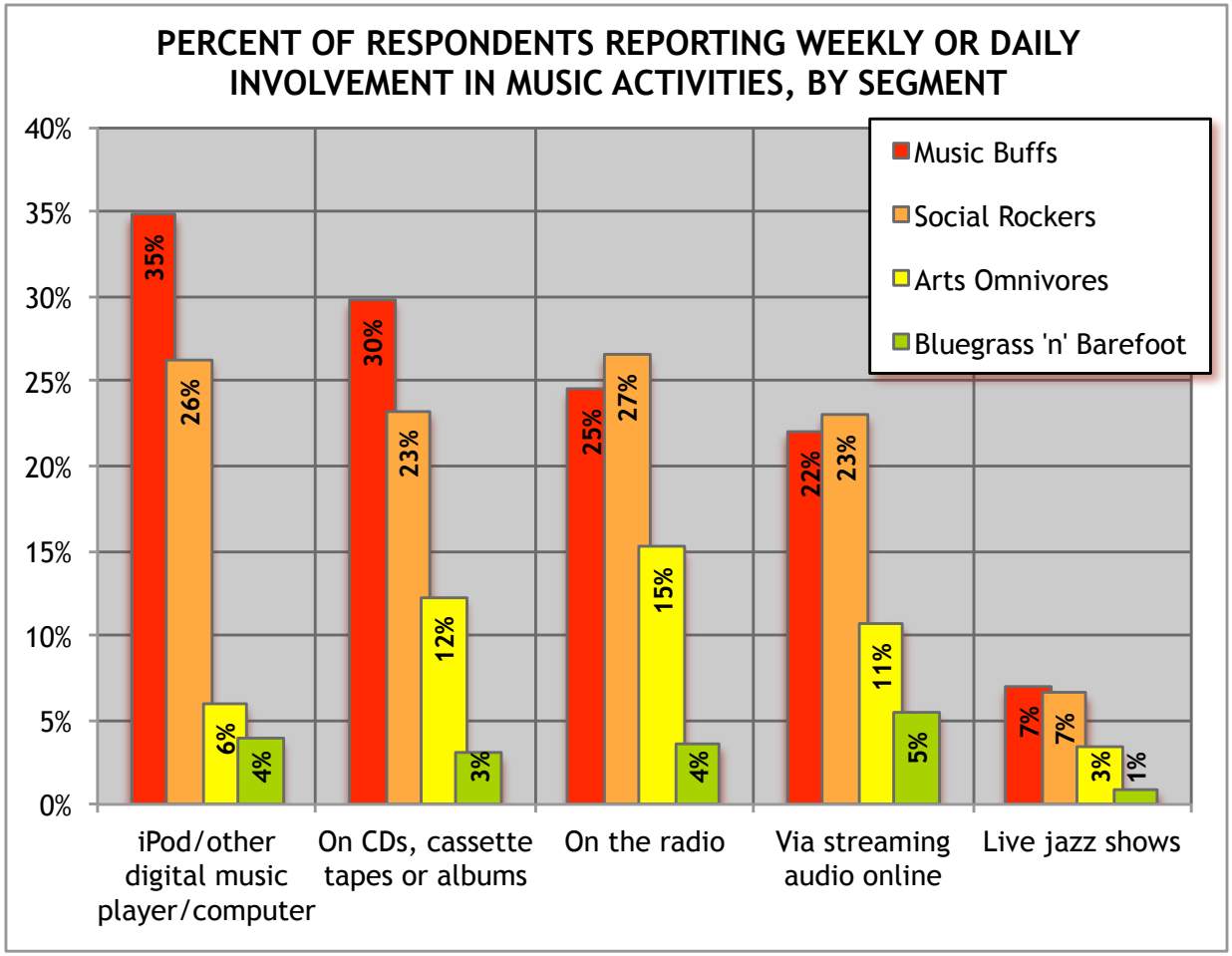
Venue Preference, by Segment



- Respondents were asked about how much they would like to see live jazz at six different types of venues. The chart at left shows results by segment, along with average age of each segment (grey dots and line).
- Overall, informal venues are more attractive to prospects across all segments, with clubs and lounges and parks or outdoor pavilions the top two preferred venues for jazz.
- Interestingly, Music Buffs are most likely to prefer formal concert halls, followed by Arts Omnivores.
- Social Omnivores, the youngest segment, are most interested of all segments in grungy dive bars.
  - Given that the ticket buyer and prospect survey results strongly suggest audiences' preferences for informal venues, how can jazz organizations diversify their venues to go beyond the formal? Are there ways of changing the existing space to create smaller and more informal spaces within?

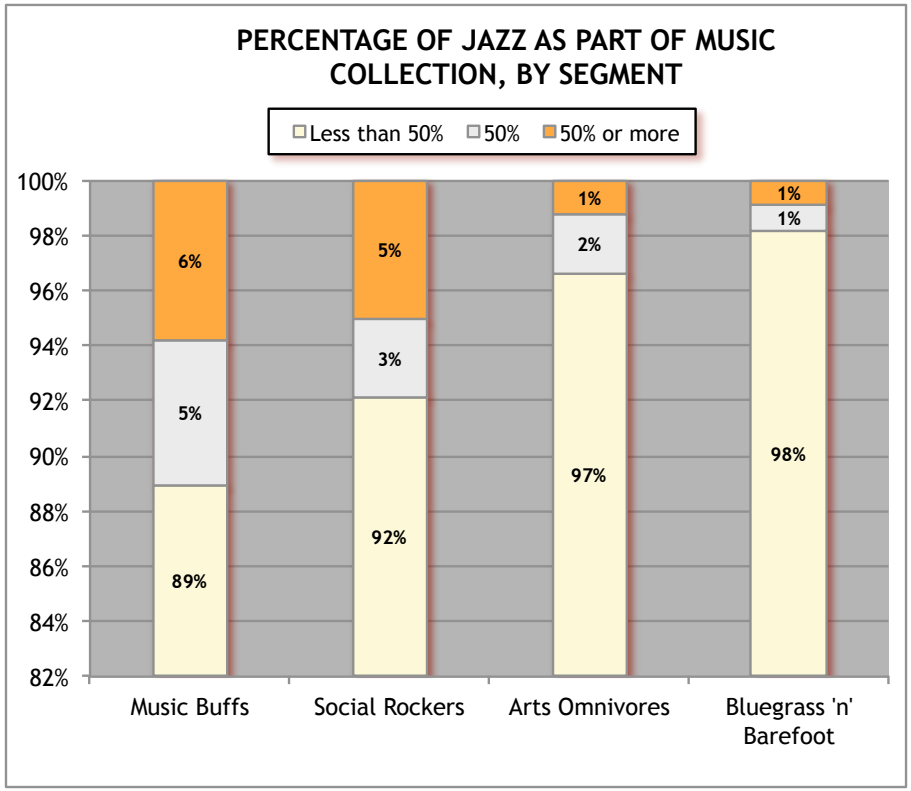
Relationship with Jazz

Frequency of Jazz Consumption, by Segment

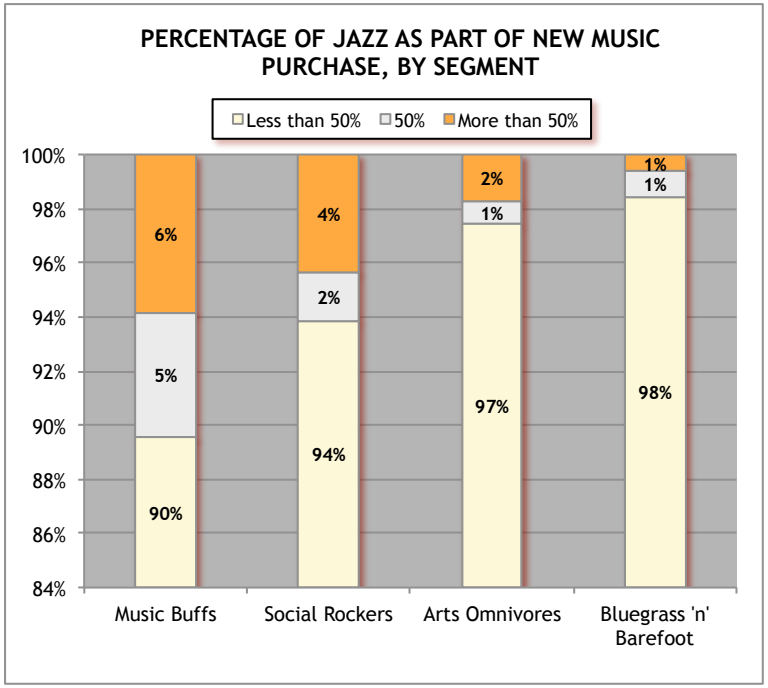


- Respondents were asked how often they listen to jazz via different media, as well as through live performance. The answer options were: never, seldom, monthly, weekly, and daily. The chart at left illustrates the aggregate percentages of respondents, by segment, who reported "daily" or "weekly" frequency for each mode of consumption.
- The youngest segments, Music Buffs and Social Rockers, are the most diverse in their use of different media for jazz listening. They are most likely to listen to jazz on an 'iPod or other similar device,' followed by 'CDs' or other types of recordings, and 'on the radio.'
- The radio is the most prevalent mode of listening for Arts Omnivores.
- Note the low levels of consumption for Bluegrass 'n' Barefoot across all media.

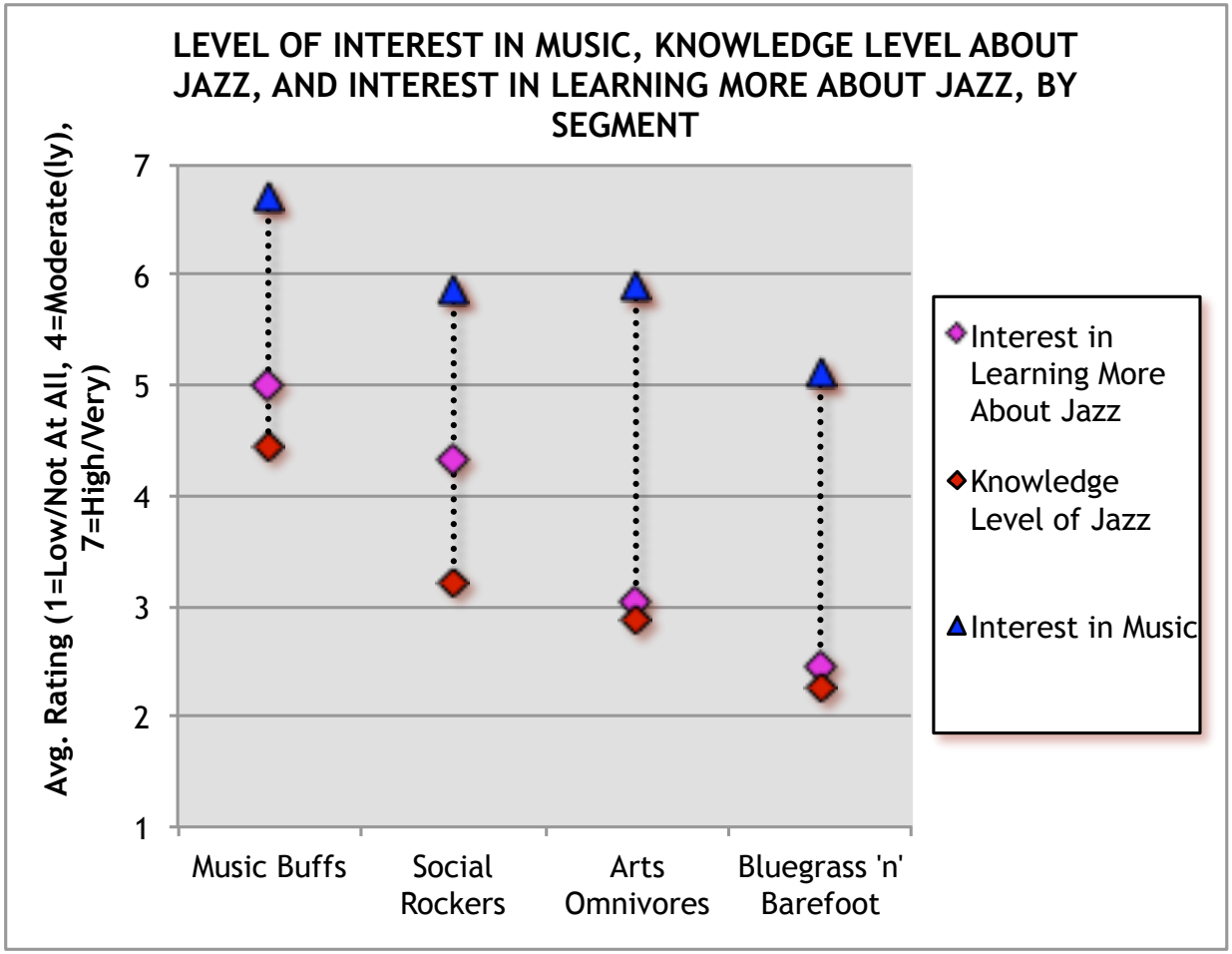
Jazz as a Proportion of Music Collection and New Music Purchase



- Another indicator of an individual's relationship with the art form is ownership of jazz recordings. Respondents were asked to estimate the proportion of jazz recordings in relation to their total music collection (see left), and were also asked the proportion of new music acquisitions accounted for by jazz recordings (see below).
- Overall, the prevalence of jazz as part of the collection or of new music purchase is significantly low for all segments, with only 11% of Music Buffs' collection consisting of jazz.
  - Is this an opportunity for jazz organizations? How might an organization go about assisting prospects with strengthening their music collection?

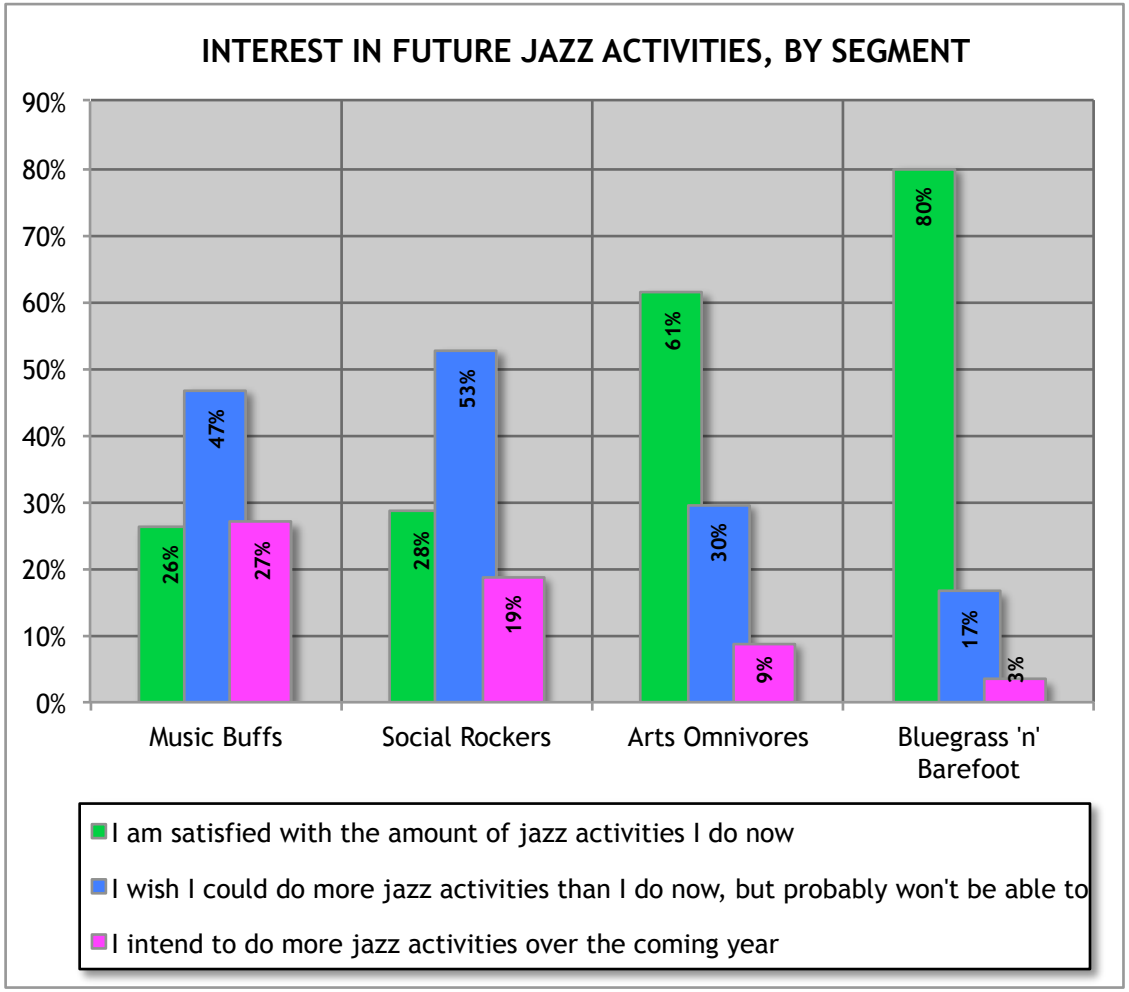


Interest in Music, Knowledge Level, by Segment



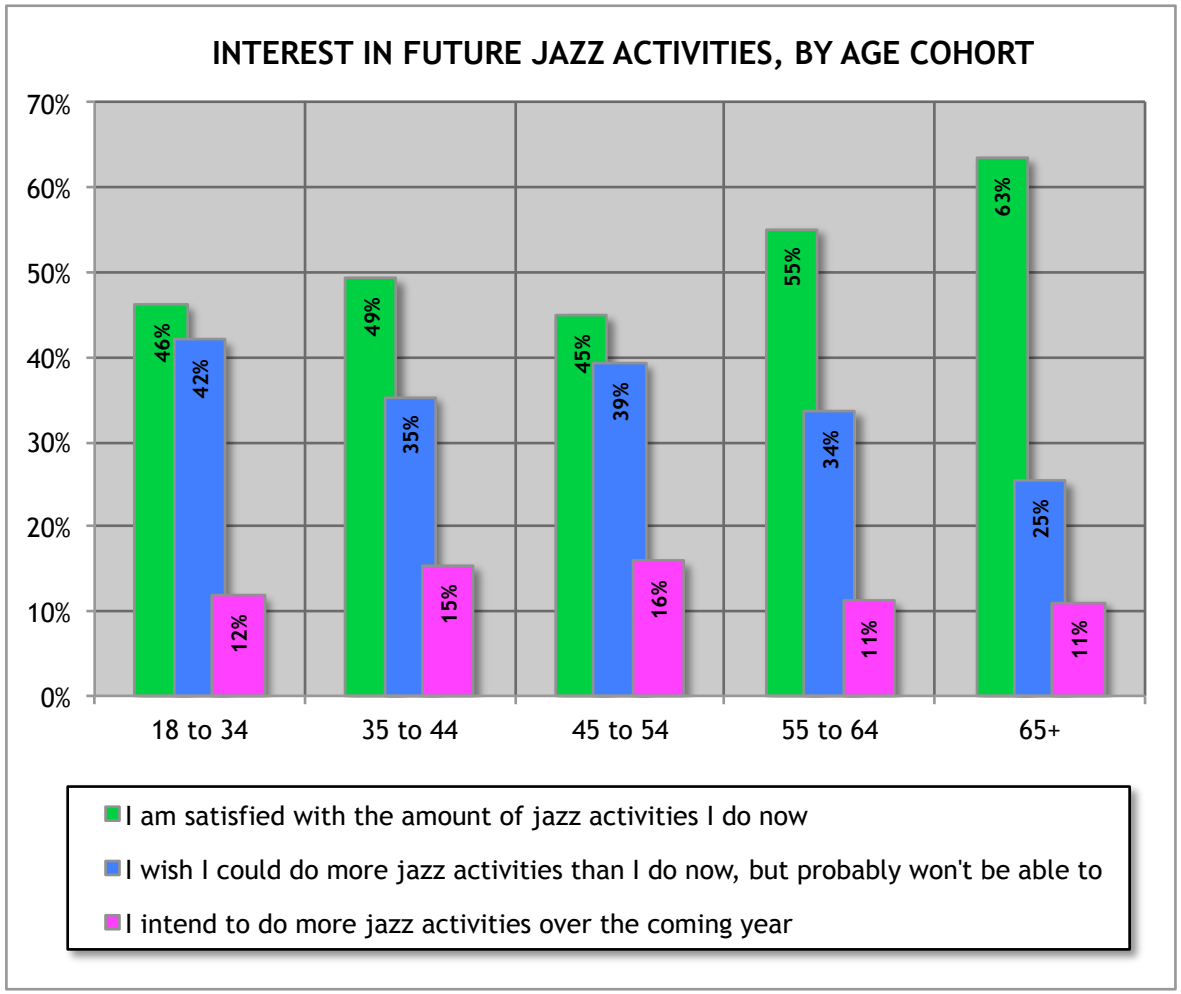
- As an indicator of their relationship with the art form, respondents were asked to self-report their level of knowledge about jazz, and their level of interest in learning more about jazz. As mentioned on page nine, respondents were also asked a screener question about their interest in music in general. Although low interest respondents were screened out of the analysis, results are still insightful (blue dots at left).
- As befits their name, Music Buffs are by far the most knowledgeable about and interested in learning more about jazz, as well as have the strongest interest in music activities in general.
- Arts Omnivores have the second highest interest in music, although their knowledge level and interest in jazz are much lower.
  - As knowledge increases, so does interest in learning more (36% of the variance in interest is affected by knowledge level). This begs the question: If Arts Omnivores were more experienced with jazz, would their interest in learning and doing increase as well?
- Note the low levels of knowledge and interest for the Bluegrass 'n' Barefoot segment.

Interest in Doing Jazz Activities More Often in the Future, by Segment



- In order to gain a sense of aspirational involvement in jazz, respondents were asked about their interest in doing more jazz activities than they currently do. They were allowed to choose which statement (shown at left), best described their future intentions regarding jazz activities.
- Over half of Social Rockers are 'wish to do more than now, but probably won't be able to.' Although not clear, this may be due to price sensitivity and time barriers (see page 27 regarding purchase decision factors).
- Music Buffs are most likely to 'intend to do more in the coming year' (27%), followed by Social Rockers (19%).
- Six in ten Arts Omnivores and eight in ten Bluegrass 'n' Barefoot prospects report being satisfied with the level of activity they currently do.

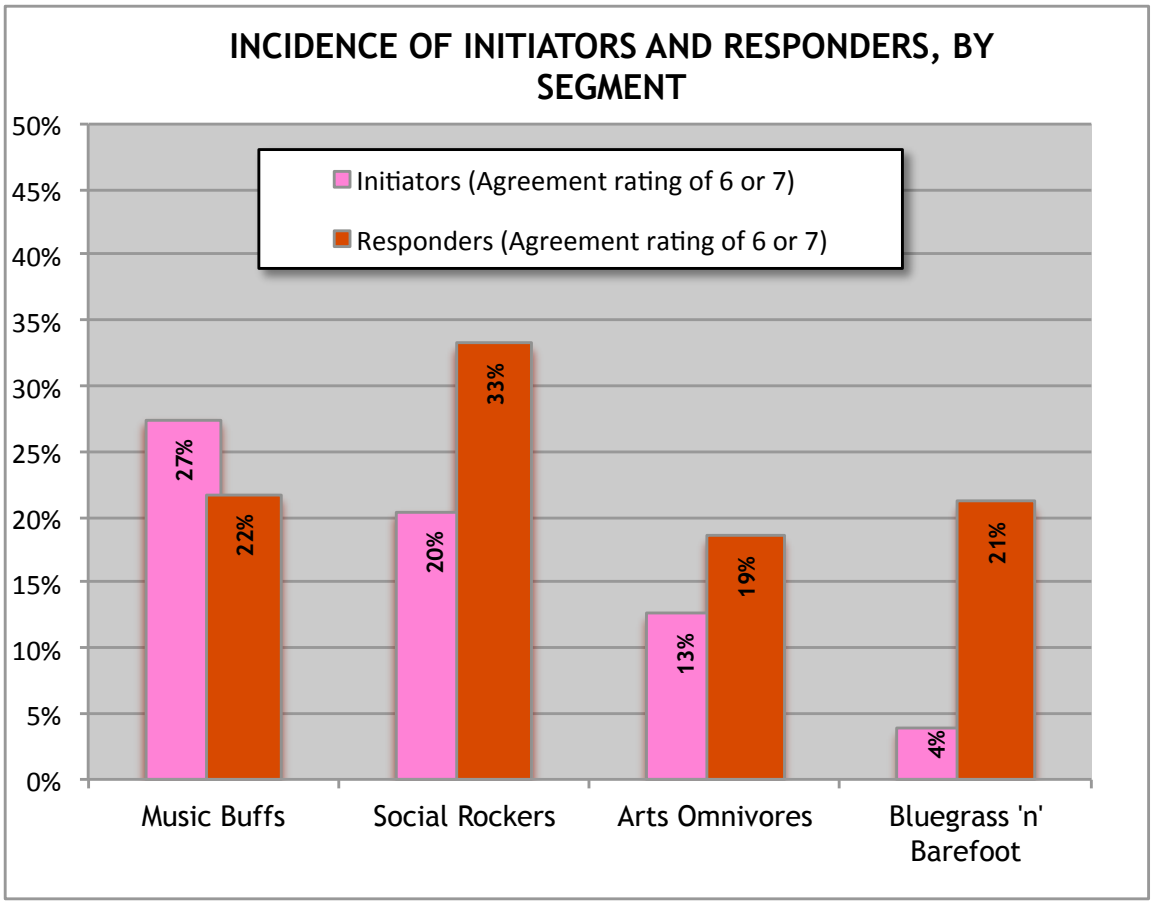
Interest in Doing Jazz Activities More Often in the Future, by Age Cohort



- Results by age reveal an intuitive pattern: younger respondents are most likely to do more in the coming year, with 27% under 45 reporting they intend to do so.
- About four in ten 18 to 34 year old respondents wish to do more, but probably won't be able to, probably reflective of high price sensitivity.
  - Low cost programs, like SFJAZZ's Hotplate series ($5 admission) are a good example of how to appeal to a younger audience whose limited income prevents them from attending many professional jazz presentations.
- Older respondents are much more likely to be satisfied with their level of activity.

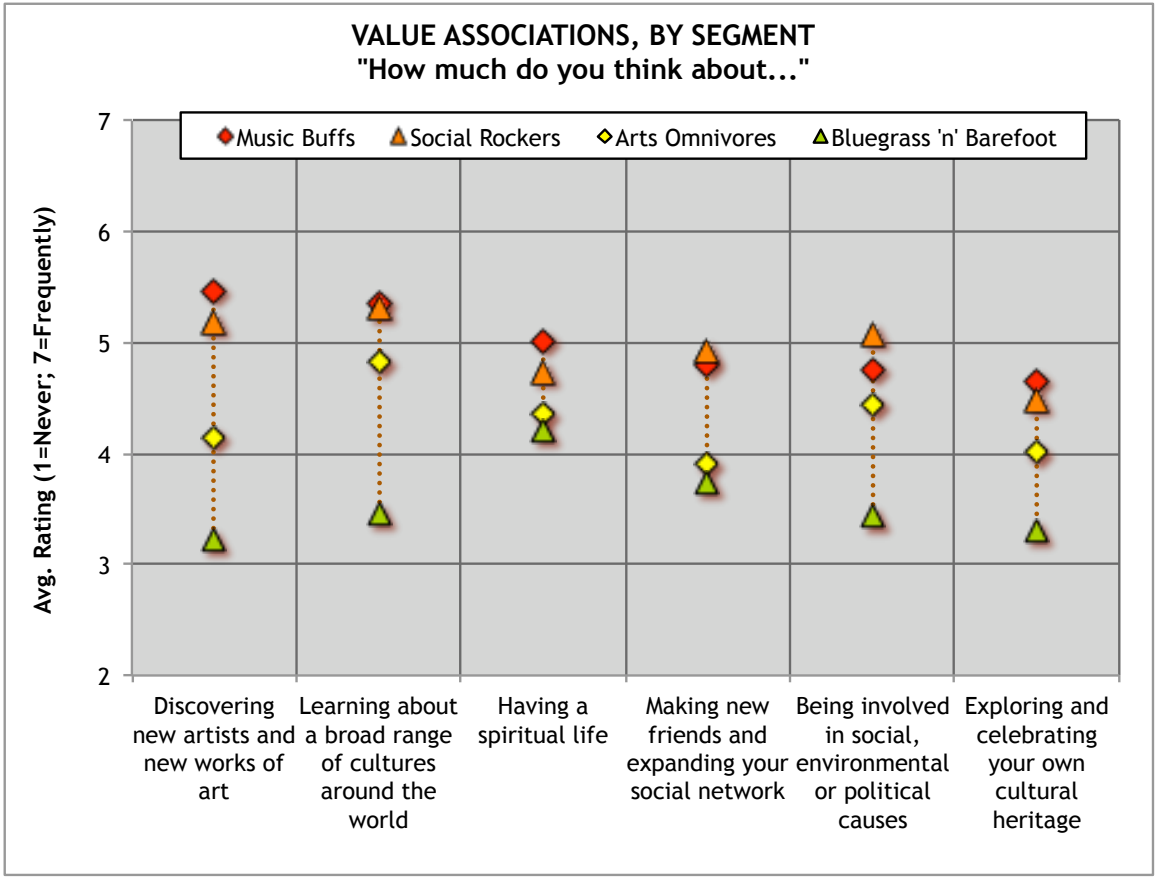
Core Values, Initiator/ Responder Status, and Technology Use

Prevalence of Initiators and Responders



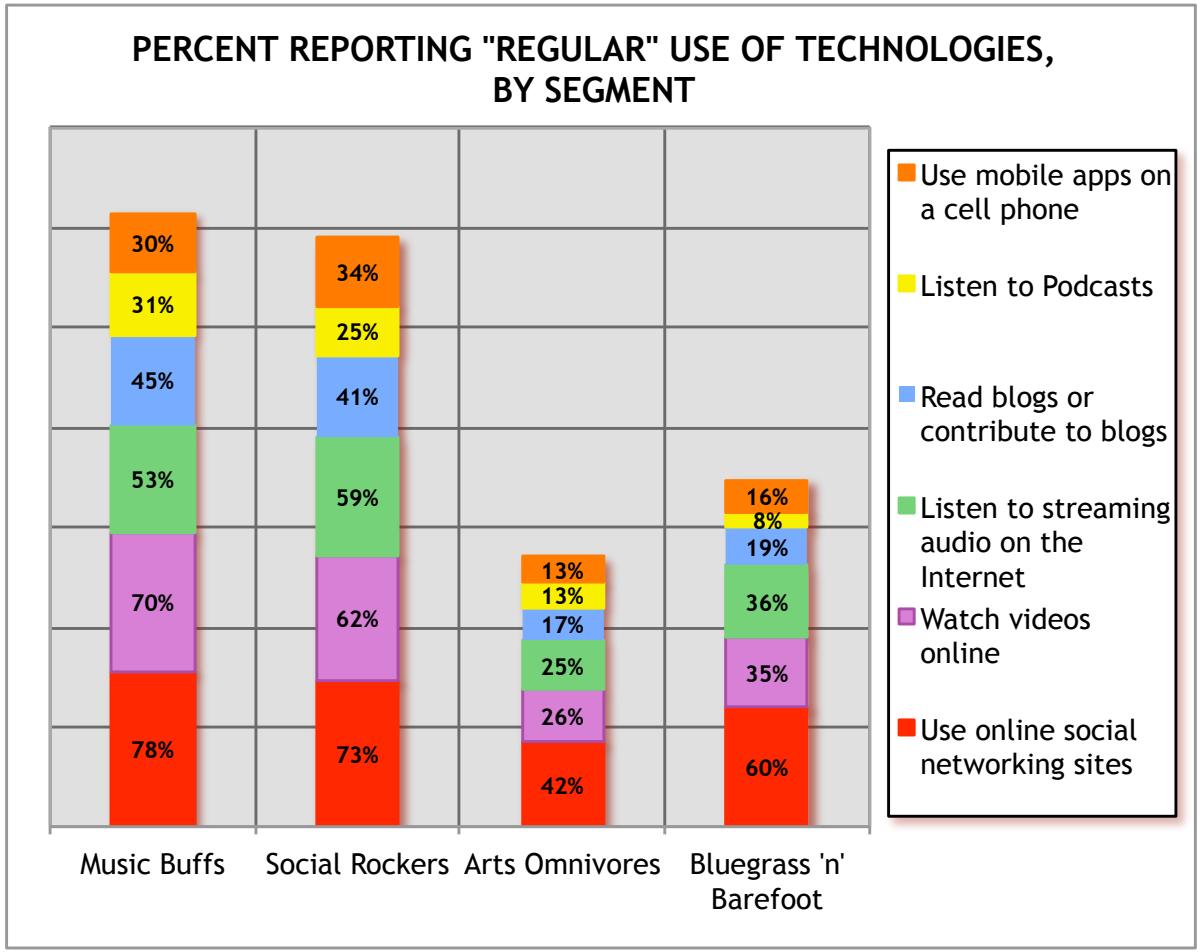
- To gain a clearer picture of the representation of Initiators and Responders amongst the six segments, the percentage of respondents who strongly associate with each statement was calculated (i.e., answered 6 or 7 on an scale of 1 (no association) to 7 (strong association).
- Music Buffs are most likely to be Initiators, followed by Social Rockers (27% and 20%, respectively).
- One-third of Social Rockers are likely to Responders, the highest proportion of any segment, followed by Music Buffs and Bluegrass 'n' Barefoot.
  - How can jazz organizations create socially-oriented programming that might allow for interaction during the program (i.e., audience members enjoy the music while hanging out in the lobby talking)?

Value Associations



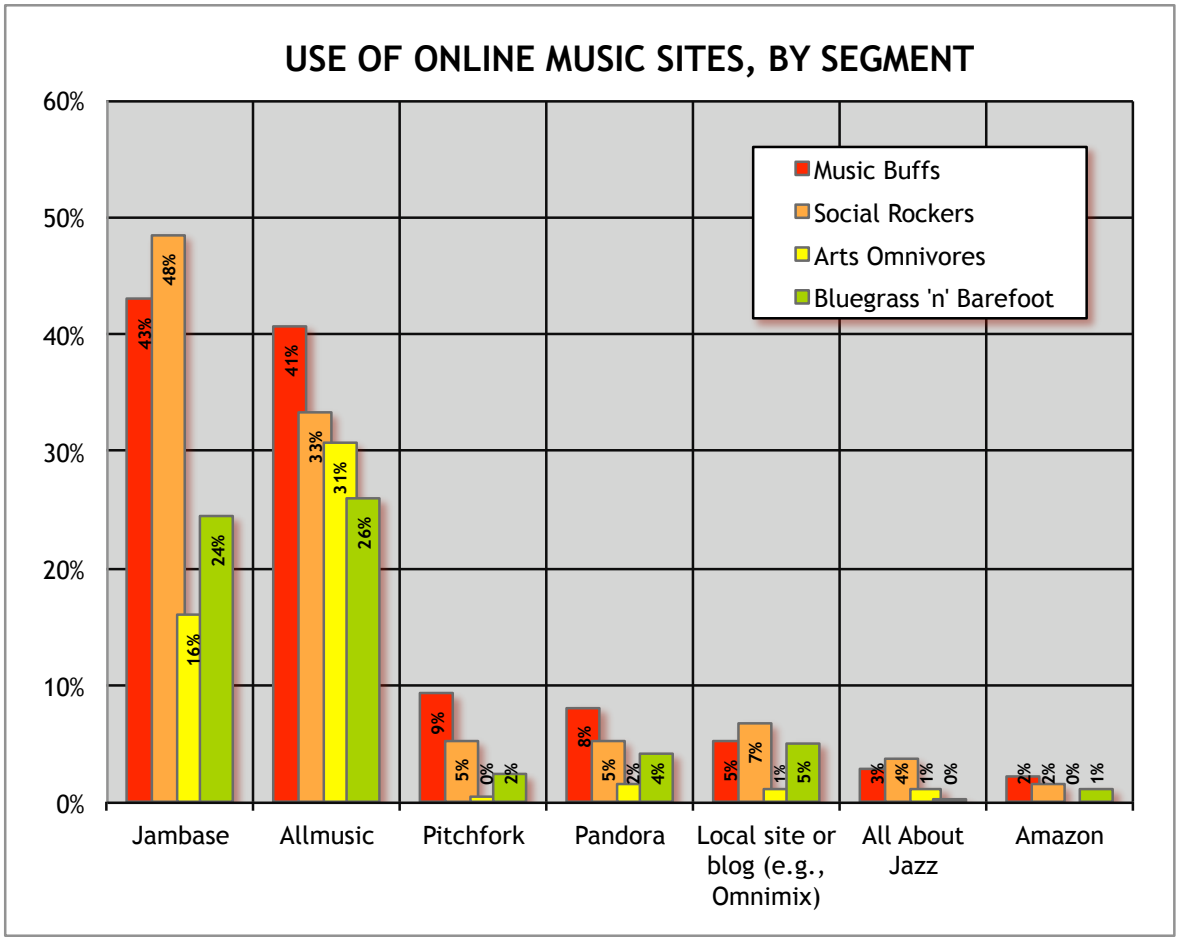
- In order to gain a more general sense of their underlying values, respondents were asked how often they think about six different areas. Results by segment are shown in the chart at left.
- Music Buffs and Social Rockers are most highly associated with 'discovering new artists and new works of art,' and 'learning about a broad range of cultures around the world.'
- Social Rockers are most likely of all segments to think about 'making new friends,' underscoring their social nature and focus. They are also most likely to associate with 'being involved in social, environmental or political causes,' followed by Arts Omnivores.
- Arts Omnivores also feel strongly about 'learning about world cultures,' reflecting their interest in world music (see page 23).
  - How can jazz organizations tap into value systems in order to communicate and engage prospective audiences?
- Note the relative low association with all values for Bluegrass 'n' Barefoot, with the exception of 'having a spiritual life.'

Use of Technology, by Segment



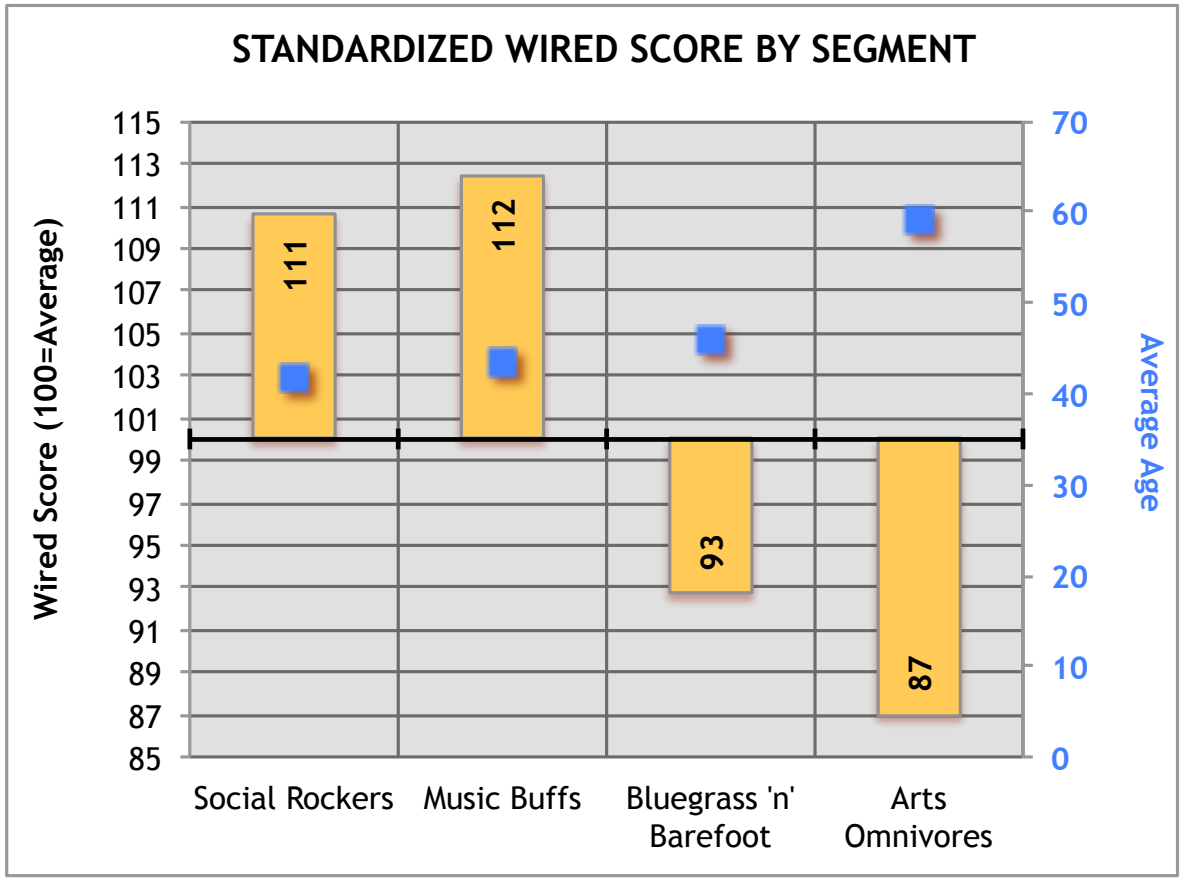
- Respondents were asked if they "regularly" do six different technology-based activities (e.g., online and cell phone use), in order to assess their overall adoption of technologies often used to deliver cultural content. Multiple responses were allowed. The chart at left shows results by segment.
- As expected, the youngest segments show the highest proportion of engagement in these types of activities. The three most prevalent activities for these segments are 'using online social networking sites,' 'watching videos online,' and 'listening to streaming audio.'
- Although Arts Omnivores are overall not as likely to engage in technology as the other segments, 42% are using social networking sites, and another half are watching videos or listening to streaming audio.
- About one in four Music Buffs and Social Rockers read or contribute to blogs.
  - How will organizations utilize these tools to create attractive and easy to use vehicles for engagement in their programming and jazz in general?

Use of Music Websites, by Segment



- Respondents were asked to note which music websites they visit on a regular basis to learn about or listen to music. Results by segment are shown at left. Multiple responses were allowed.
- Overall, about one-third of all prospects visit Jambase or Allmusic on a regular basis.
- These two websites are also the most popular websites across all segments.
- Social Rockers utilize Jambase at higher rates, in comparison with Arts Omnivores, who typically visit Allmusic.com.
- All other websites are not as frequently utilized.
  - How well do the format and content of these websites serve these respondents? How can jazz organizations reach out to constituents through music websites, aside from simply advertising?

“Wired-ness” by Segment



- In order to facilitate further analysis, results for the six technology-based activities were rolled up into a single “wired score,” which was then standardized into an index (100 = average). The chart at left illustrates the standardized “wired score” across the six segments, along with average age.
- Not surprisingly, the youngest segments, Music Buffs and Social Rockers, are the most “wired” of all segments, followed by Bluegrass ‘n’ Barefoot, with Arts Omnivores exhibiting the lowest score.

Appendix 1: Intercept Sites and Email Blasts

INTERCEPT SITES
July 23-25, 2010 - Jazz and Rib Fest Survey
July 27, 2010 - Glenview Library
July 29, 2010 (multiple dates) - The King Art Complex Survey
August 6, 2010 - JazZoo
August 6-7, 2010 - Canal Winchester Blues & Ribfest Survey
August, 8, 2010 - Goodale Park Music Series Survey
August 13, 2010 - JazZoo
August 14, 2010 - PBJ & Jazz
August 14-15, 2010 - Festival Latino
August 15, 2010 - Goodale Park Music Series Survey
August 15, 2010 - Jazz in the Garden/Columbus Art Museum
August 22, 2010 - Goodale Park Music Series Survey
September 02, 2010 - Actors' Theatre of Columbus
September 04, 2010 - Short North Gallery Hop Survey
September 10-12, 2010 -Hot Times Festival
September 11, 2010 - PBJ & Jazz
September 17-19, 2010 - Riverfront Arts Festival
September 18, 2010 - Independents' Day Festival
September 22, 2010 - Ruby Tuesday
October 2, 2010 (multiple dates) - Park Street Tavern
October 6-7, 2010 - Opera Columbus
October 16-17, 2010 - Columbus Music Co-op
October 20, 2010 Columbus Zoo
October 27, 2010 - Urban Spirit
October 2010 (multiple dates) - Bungalo Jazz
November 2010 - Capital University
Intranet Link - Cardinal Health
Personal Network Link

EBLAST PARTNER ORGANIZATIONS
Capital University
Columbus Association of Performing Arts
Columbus Women's Chorus
musiclovesohio.org
Columbus College of Art and Design
Columbus Gay Men's Chorus
Columbus Symphony Chorus
Columbus Council of World Affairs
Franklin County Events
The Small Business Beanstalk
ProMusica Chamber Orchestra
Chamber Music Columbus
City Music
Columbus Arts Marketing Association
OSU Arts Initiative
CATCO/Phoenix Theater for Children
Ballet Met
Opera Columbus
State Auto Insurance
Columbus Underground
Columbusarts.com
Cringe.com
Donewaiting.com
Experience Columbus
Jazz Columbus
State Auto Insurance
Swing Dance Columbus
TiXiT
WCBE
WMNI
WOSU
Young Professionals (Columbus & Columbus Chamber)

Appendix 2: Survey Protocol