Rhode Island and Providence Cultural Assessment Survey Summary Report

Updated December 17, 2008

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December 8, 2008

Table of Contents

The survey and report are organized in nine sections. The survey asked everyone general and demographic questions. Other sections were answered only by specific constituents.

Executive Summary 1
Survey Methods 3
Summary Findings 4
Section 1. General Questions 4
Section 2. RISCA Constituents 7
Section 3. Artists 8
Section 4. Nonprofit Cultural Organization Leaders 9
Section 5. Nonprofit Workers in Cultural Organizations 11
Section 6. Arts Educators and Parents 12
Section 7. Business Owners and Managers 13
Section 8. Creative Workers 13
Section 9. Demographics of Respondents 14

Rhode Island and Providence
Cultural Assessment Survey
Summary Report

Executive Summary

The Rhode Island State Council on the Arts (RISCA) and the City of Providence Department of Art, Culture + Tourism (ACT) conducted a 2008 constituent survey in partnership. RISCA is sampling constituent opinions as the agency updates its strategic plan. ACT is assessing Providence citizens on behalf of the *Creative Providence*, city-wide cultural plan.

Survey respondents An excellent response of 2,027 survey replies provides a good sample of constituent opinions. Planners are comparing survey results to focus groups, forums, and other data as survey results do not necessarily reflect opinions of all Rhode Island citizens. Respondents are well balanced by residency across the state and age. Those who completed the survey are more older, often female, better educated, more affluent, more white than the general population. Artists and interested citizens are the largest two groups of survey respondents and core constituents of RISCA and ACT. Nearly two thirds of survey respondents reside outside the City of Providence.

	Median Age	College graduates	Median family Income	Race	Gender
Survey respondents	40-49	39%	$50,000 – 75,000	88% white	66% female 34% male
Rhode Island	37	26%	$47,037	83% white	52% female 48% male

Cultural attendance Survey respondents attended a wide range of cultural programs and events. The most popular are libraries and bookstores, art museums and galleries, and fairs and festivals. Respondents who often or sometimes attend cultural programs most frequently do so in Providence or their local neighborhood or community. Time and admission costs most limit participation in local cultural programs. Electronic communications and personal recommendations are cited most often as useful sources of information about cultural programming. While the sample of people of color is too small to be statistically accurate, these respondents report two barriers to cultural participation significantly more often than do white respondents: “don’t feel comfortable or welcome” and “no transportation.”

Giving time and money Half of survey respondents made modest annual cash contributions to cultural organizations. A third volunteer occasionally for nonprofit cultural organizations. About two in ten respondents volunteer frequently or have served on a governing board of directors. Over half of respondents indicate that inadequate time limited their capacity to volunteer and many said “no one asked me.”

Arts education Nearly two thirds of all respondents had negative opinions about the quality of arts education in Rhode Island schools. Very few responding educators and parents believe that arts education is equally accessible throughout Rhode Island. Most educators report that schools do participate in arts enrichment programs in collaboration with artists and cultural organizations. Funding is the greatest perceived limit to cultural partnerships in schools. The most frequent positive response about Rhode Island arts education, by far, is cultural organizations working in partnership with schools. Many others cite dedicated teachers and school staff. The most common call for improvement is a general appeal for more arts education opportunities in schools, followed closely by calls for adequate funding, and more arts specialist teachers.

Rhode Island State Council on the Arts RISCA constituents identified six top priorities for RISCA. Funding arts education is the top recommended priority, followed closely by grants to organizations, arts education advocacy and leadership, grants to individual artists, advocacy for public awareness and support of the arts, and economic development through the arts. The top two recommendations to RISCA are to focus RISCA grant-making and to advocate for and encourage arts education.

Artists The majority of Rhode Island artists and creative workers primarily market their work outside the state. Nearly two thirds of Rhode Island artists responding to the survey report they must work at non-arts jobs to support themselves or their families. Nearly half of responding artists are not satisfied that their arts business is stable, however they are confident of their future as artists. Affordable health insurance and increased earnings top the list of most important artist needs. Grant funding and marketing are nearly as important. They also need affordable studios and want networking.

Nonprofits At the time of the survey, nearly two-thirds of nonprofit representatives thought their organizations were stronger now than three years ago. Operating and program funding is their top need. Nonprofit leaders also want significant help with marketing and audience development and facilities improvement. Most nonprofit leaders are confident that their organizations will sustain and improve programs over the next three years. Nearly a quarter of leaders indicate their organizations have accumulated deficits (negative net assets). Of those with accumulated deficits, many report this is worse than last year.

Nonprofit cultural workers Just over half of responding workers in nonprofit cultural organizations are full-time employees with employer-provided health insurance. About half of cultural workers must work multiple jobs to support themselves or their families. Their top need is increased earnings.

General business perceptions Just over half of responding business owners and managers thought access to arts and culture is an important consideration in locating or retaining businesses in Rhode Island, but nearly half do not find this important. Half of business leaders believe culture is important or very important for workers and half do not believe this is true.

Creative businesses The majority of creative businesses are organized as sole proprietorships, partnerships, or other forms of self employment. This means the creative sector is under-reported in labor statistics. Independent artists are the largest proportion of Rhode Island creative industries. The largest occupation classifications are visual and performing artists. Half of creative workers are self employed and employ no additional workers. Health insurance is the greatest need for creative workers.

Survey Methods

The Rhode Island State Council on the Arts (RISCA) and the City of Providence Department of Art, Culture + Tourism (ACT) conducted a constituent survey in partnership. RISCA is using the survey to sample constituent opinions as the agency updates its strategic plan. ACT is doing the same thing on behalf of its city-wide cultural plan.

RISCA and ACT launched the survey October 28 and closed it November 25, 2008. Each agency distributed email invitations to its lists of constituents and allies. Respondents clicked through a link in the announcements to an online survey in the Zoomerang survey system.

An excellent response of 2,027 survey replies provides a good sample of constituent opinions. Planners are comparing survey results to other data including focus groups, interviews, and community forums as survey results do not necessarily reflect opinions of all Rhode Island citizens. Respondent demographics are well balanced by residency across the state and age. Those who completed the survey are more often female, better educated, more affluent, more white than the general population.

Dr. Craig Dreeszen designed the survey, analyzed the data, and wrote this report. Those who prefer graphic depictions of the data should review the power point version. Archival copies of all verbatim comments are on file with RISCA and ACT.

Summary Findings

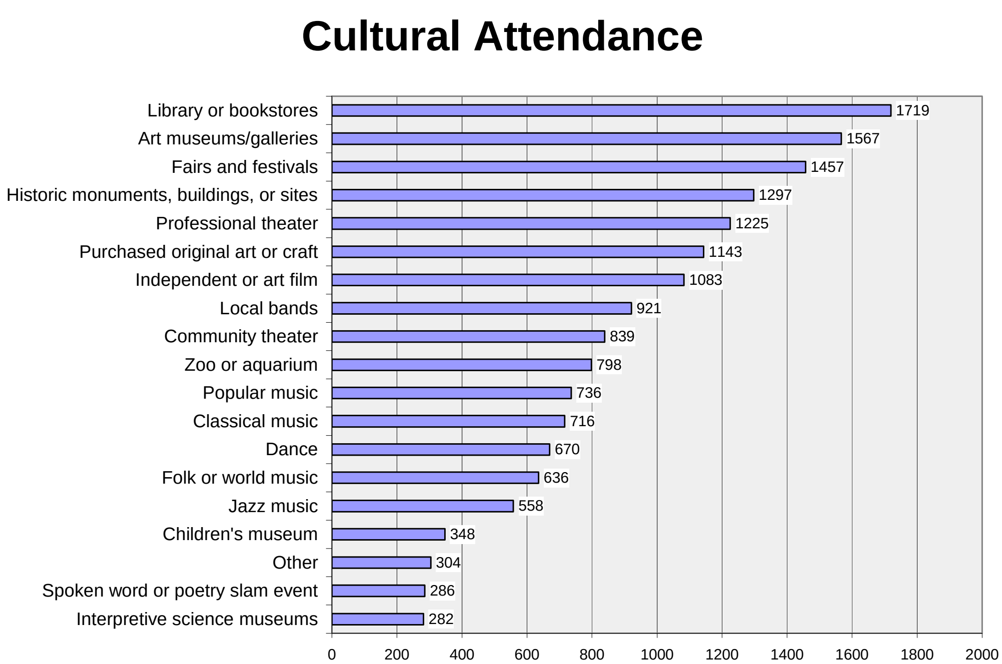
Section 1. General Questions

2,027 survey respondents answered questions in this section

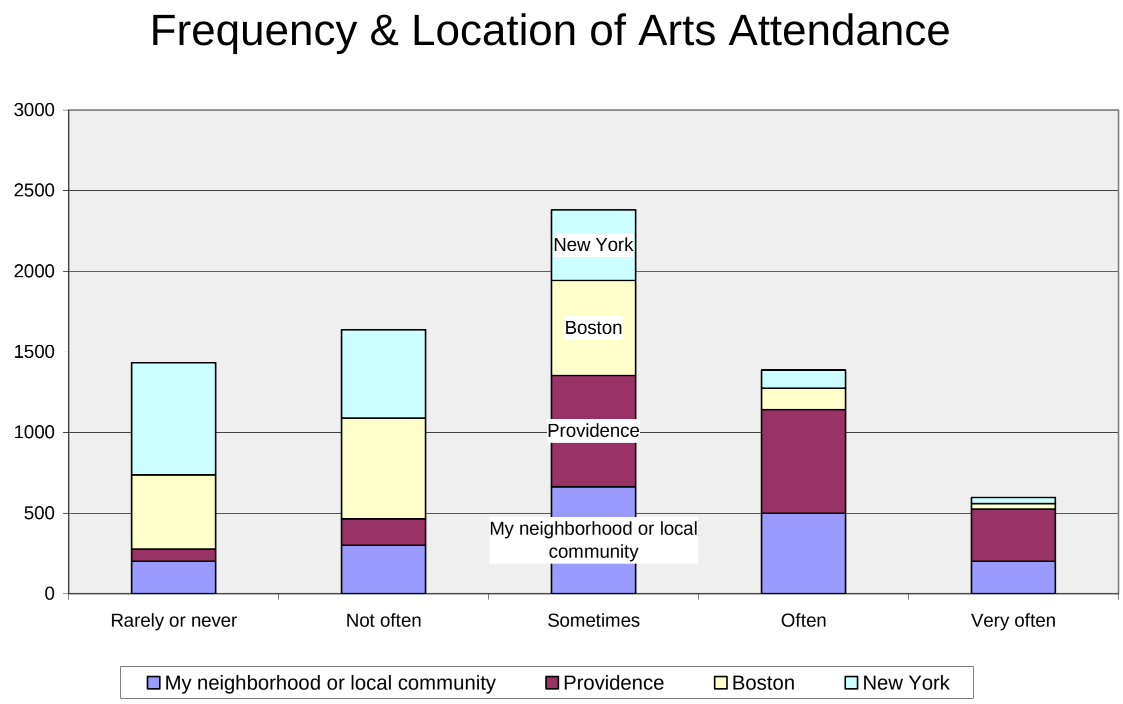
Respondents Artists and interested citizens are the largest two groups of survey respondents. We also heard from a large number of nonprofit board and staff members and people involved in education as teachers and professors, parents, teaching artists, and administrators. Many other creative workers, funders, and students also replied.

Residency Nearly two thirds of survey respondents (64%) reside outside the City of Providence. Over a third (36%) live in Providence. Opinions are generally consistent throughout the state.

Cultural attendance Survey respondents attended a wide range of cultural programs and events in the past twelve months. Most popular are libraries and bookstores (attended by 85%), art museums and galleries (78%), and fairs and festivals (72%). Other well attended attractions are: historic monuments, buildings and sites (64%), professional theater (61%), purchase of art or craft (57%), and independent or art film (54%). Also well attended are local bands (46%), community theaters (42%), and zoos or aquariums (40%). Following in order of most frequent attendance are: popular music (37%), classical music (36%), dance (33%), folk or world music (32%), jazz (28%), children’s museums (17%), and poetry or spoken word (14%). The most frequent “other” write-in attraction was Waterfire. Percentages exceed 100 because people could pick multiple choices.



Frequency and location of cultural attendance Respondents who "often" or "sometimes" attend cultural programs most frequently do so in Providence or their local neighborhood or community. Those who "sometime" attend cultural programs equally visit Providence or their local community[1]. People who attend "often" or "very often" are slightly more likely to do so in Providence. Boston and New York also attract people who attend "sometimes," with about a third sometimes going to Boston and a quarter sometimes going to New York.



Limits to cultural participation The survey asked what limits people's participation in local cultural programs. Time and costs are the biggest concerns. Most often respondents cite "hard to make time to get out" as a significant barrier or somewhat of a barrier (cited by 54%). Nearly as many indicate "cost of admission" was a barrier (42%). Other limits to participation (in order most frequently mentioned): lack of parking, family obligations or child care, lack of information about events, events not of interest, driving distance, no transportation, or prefer to spend leisure time other ways, or don't feel comfortable or welcome. While the sample of people of color is too small to be statistically accurate (12%), these respondents report two barriers to cultural participation significantly more often than do white respondents: "don't feel comfortable or welcome" and "no transportation."

Useful sources of cultural programming information Electronic communications through websites, email, or e-newsletters from cultural organizations are cited most often as useful sources of information. This can be expected from an electronic survey, though usually in research like this, word of mouth is rated most highly. Personal

[1] For about a third or respondents, Providence is their local community.

recommendations or invitations (word of mouth) are rated second. Direct mail from cultural organizations is cited third. Radio and daily newspaper events listings are next. Other useful sources of information (in order of importance) are: posters, weekly newspapers, television, ACT e-newsletter, newspaper ads, RISCA newsletter or blog, ArtTIX web site or e-newsletter, and local blogs.

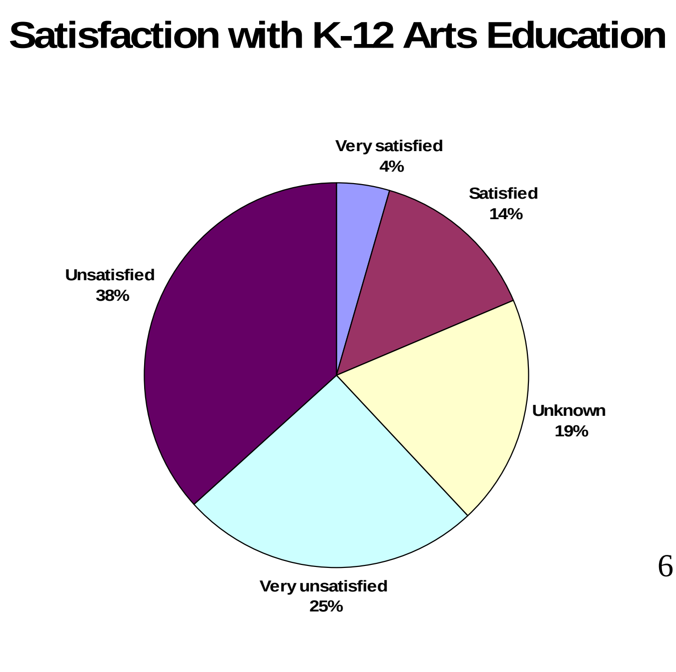
Trying new cultural experiences A recommendation or invitation from a friend or colleague is most likely to encourage respondents to try a new cultural experience. Discounted admissions or positive news media reviews may persuade others to try something unfamiliar. Other motivators (in order of importance) include: educational information in advance of the event, positive comments in online social networks, and help to interpret the experience (gallery or performance discussion).

Cash contributions Over half of survey respondents (51%) made modest annual cash contributions to cultural organizations. Another third (32%) made occasional, modest gifts. A few made modest capital contributions (7%), significant annual contributions (5%), or significant capital contributions (2%). About a quarter rarely (18%) or never (7%) made cash contributions to cultural organizations. People picked multiple options.

Volunteering A third (33%) volunteer occasionally for nonprofit cultural organizations. About two in ten respondents (21%) have served as volunteers with cultural organizations as members of committee, task force, or advisory boards. The largest group of respondents, over a third (35%) said, “No,” they do not volunteer for nonprofit cultural organizations. Nineteen percent volunteer frequently and 18 percent have served on a governing board of directors.

Barriers to volunteering Over half of respondents (56%) indicate that inadequate time limited their capacity to volunteer. Four in ten (42%) said “no one asked me.” Barriers also include ambiguous volunteer tasks or responsibilities, groups’ long-term expectations of service, the respondents’ lack of interest, legal concerns. A few other write-in comments note other concerns: location or seasonal residency, not knowing how to get involved or what organizations need help, health or aging, family responsibilities, work as nonprofit staff, can’t meet fundraising/contribution expectations of board members, demands of work, or conflicts of interest.

Satisfaction with K-12 arts education Nearly two thirds (63%) of all respondents have negative opinions about the quality of arts education in Rhode Island schools. Of these, 38% were very unsatisfied, and



25% unsatisfied. Less than a quarter (18%) have positive perceptions with 14% satisfied and 4% very satisfied. Nineteen percent replied “unknown.” A later section examines the opinions people who are more closely associated with education.

Section 2. RISCA Constituents

597 RISCA constituents answered questions in this section

Most important RISCA priorities Constituents identified six top priorities for RISCA and many more highly valued strategies. Funding arts education is the top recommended priority, followed closely by grants to organizations, arts education advocacy and leadership, grants to individual artists, advocacy for public awareness and support of the arts, and economic development through the arts. Other important recommendations include: services to individual artists, support for arts entrepreneurs and businesses, services to organizations, public art, cultural tourism, and arts directories and information. Many also value funding and services for folk and traditional artists. Others recommend that RISCA encourage studio film and TV productions in Rhode Island and direct assistance to the local film and TV community.

Comparisons of survey respondents who reside inside and outside of Providence indicate that recommendations to RISCA do not vary much across the state. However, Providence residents are slightly more likely to recommend as RISCA priorities: public art (by 5% margin), grants to individual artists (by 6%), support for arts entrepreneurs and business (by 4%), and direct assistance to local film/TV community (by 6%). People living outside Providence are slightly more likely to recommend as priorities: cultural tourism (by 4% margin) and encouraging studio film/TV productions in RI (by 6%).

Advice to RISCA We asked an open-ended question, “What opportunities or needs should RISCA staff and Council members consider as they update their strategic plan?” The top two recommendations are to focus RISCA grant-making and to advocate for and encourage arts education.

Recurring themes (Suggestions made by ten or more respondents, listed in the order most frequently mentioned; numbers indicate the frequency each idea is cited by respondents).

- Recommend RISCA granting priorities (cited by 71 respondents). Note recommendations regarding RISCA funding are sometimes contradictory:
    - Continue to fund individual artists (cited by 26)
    - Concentrate RISCA funding with fewer, larger grants to successful organizations that achieve results (10)
- Advocate and encourage arts education (42)
- Lead in advocacy and public education to value arts and culture (16)
- Help artists develop entrepreneurial skills (13)
- Encourage development of affordable spaces for artists and performances (11)
- Encourage cultural diversity in the arts (10)

Section 3. Artists

597 Artists answered questions in this section

Most artists export their work The majority of Rhode Island artists (61%) primarily market their work outside Rhode Island. Of these, a third (33%) report their largest market is regional; nearly a quarter (22%) indicate their market is national; and for six percent their largest market is international. For thirty nine percent of artists, their primary market is local. This is consistent with focus group findings, in which artists describe the lack of a solid local market as a serious problem. However, from an economic perspective, Rhode Island artists are export industries, exporting goods and services and importing cash.

Artists' markets At the time of the survey, over half of responding artists (59%) reported that the market for their work has grown over the past two or three years.

Most artists depend on non-arts jobs Nearly two thirds (63%) of Rhode Island artists responding to the survey report they must work at non-arts jobs to support themselves or their families.

Artists' business stability Over two thirds of responding artists (69%) are not satisfied that their arts business is stable. Of these 19% are very unsatisfied. Nearly a third of artists are positive with 28% satisfied and 3% very satisfied.

Artists' confidence Artists are more confident about the future of their creative careers. Two thirds are positive with half confident and 16% very confident of their creative careers. About a third are negative, with 28% not very confident and 6% not at all confident.

Artists' Perceptions			
Depend on non-arts jobs?	Business stability	Confidence in career?	Markets grown in recent years?
64% Yes	69% Negative	66% Positive	59% Yes

Artists' most important needs Affordable health insurance and sales or other earnings top the list of very important artist needs. Grant funding, marketing, networking, and affordable studios are nearly as important. Other needs (in order of most importance) are: affordable housing, finding equipment, equipment or supplies, validation of work, business management training or assistance, rehearsal or performance space, access to financial credit, information, legal advice, finding good assistants, and creative skills training.

We also asked the open-ended question, "What would help you as an artist or creative professional working in Rhode Island?" Their answered closely paralleled the previous fixed response question, though the need for public support and patronage came out more strongly. Other new needs are: suggested affordable health care tax breaks. The following needs were repeated by at least ten artists:

- Grants or financial aid (cited by 78 responding artists)
- More support from collectors, patrons, buyers, audiences, sales (48)
- Health insurance, access to affordable health care (45)
- Tax breaks (35)
- Affordable housing (35)
- Business development (30)
- Networking (28)
- Marketing (25)
- Studio, work space (22)
- Performance venues (19)
- More galleries (18)

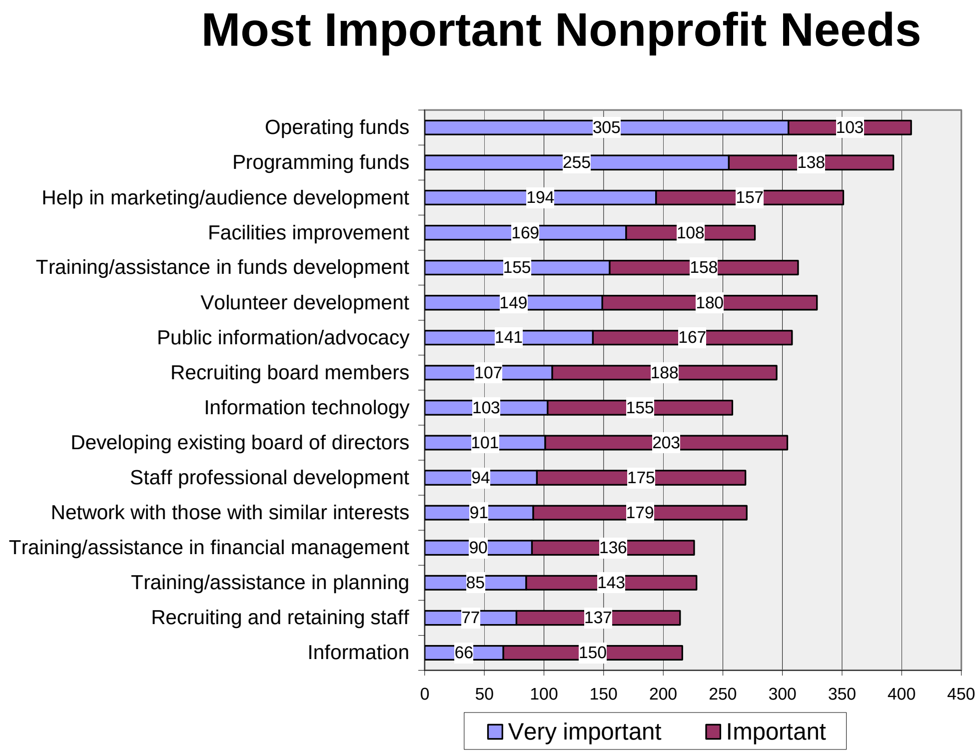
Section 4. Nonprofit Cultural Organization Leaders

536 Nonprofit leaders answered questions in this section

Types of nonprofits The largest two groups of board and staff leaders responding to the survey represent performing arts producers and cultural service organizations. A large number of educational institutions, performing arts presenters, museums, and galleries are represented. We also heard from arts centers, historic sites and museums, artist guilds, libraries, economic development organizations, community centers, and arts councils.

Nonprofit health At the time of the survey, nearly two-thirds (63%) of nonprofit representatives thought their organizations were stronger now than three years ago. Of these, 40% said they were somewhat stronger and 23% said much stronger. Fifteen percent are somewhat weaker and four percent much weaker. The balance (48%) report no significant change.

Nonprofit needs Funding is the top need for nonprofit cultural organizations. Operating funds top the list of needs followed closely by programming funds. Nonprofit leaders also want significant help with marketing and audience development and facilities improvement. Training in funds development, volunteer development, public information and advocacy, and board recruitment are also important needs. Other cited needs include: information technology, board development, staff development, networking, financial management help and planning assistance.



Nonprofit leader confidence At the time of the survey, over three quarters (82%) of nonprofit leaders are confident that their organizations will sustain and improve programs over the next three years. Of these 57% are confident and 25% are very confident. Another 16% are not very confident and 2% are not at all confident.

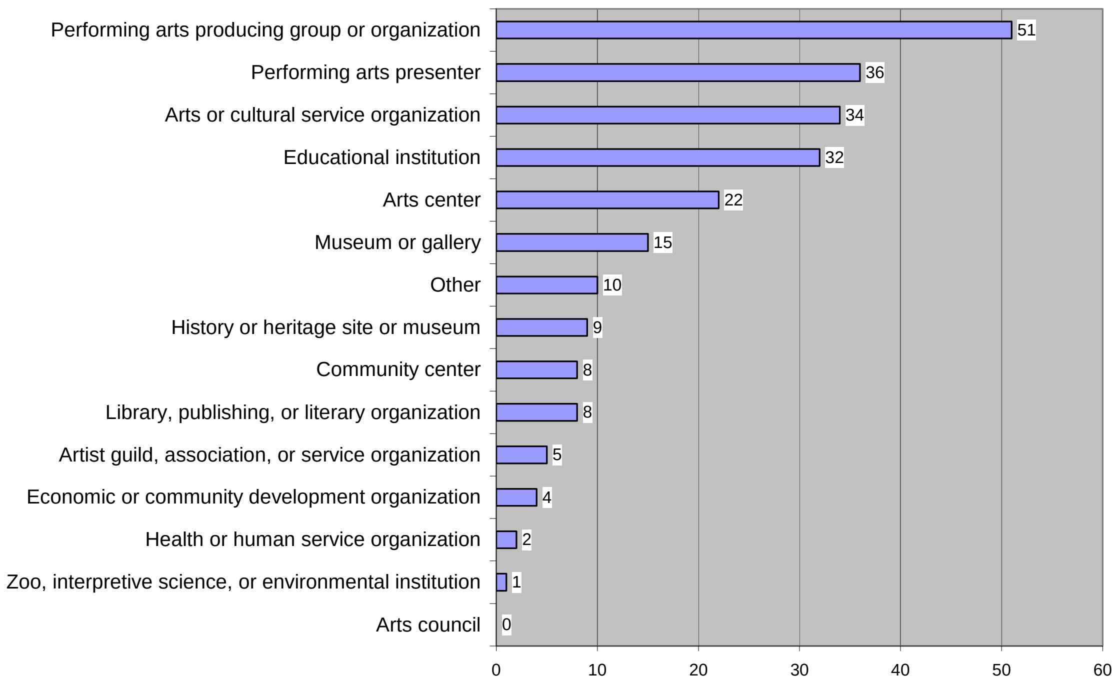
Funding trends We asked nonprofit leaders to estimate relative changes in several sources of revenues over the past three years. The most common response was "no change" though focus groups and interviews indicate the situation has worsened significantly since the survey. For most nonprofits over the past three years, earned revenue has grown somewhat or been steady**.** Foundation revenue has been mostly unchanged. Business and corporation revenue has been mostly unchanged or declining. Municipal grants have been mostly unchanged or declining. Most report steady local public funding. Others report local public dollars are down somewhat. State grants were mostly unchanged or declining. Federal grants are mostly unchanged or declining. For every funding category, some report significant drops in revenue and a few report significant increases.

Nonprofit planning Nearly three quarters of responding nonprofits (73%) have written strategic or business plans. Over a quarter (27%)do not plan.

Accumulated deficits Over three quarters of nonprofit leaders (78%) responding to our survey, indicate their organization has no accumulated deficit (net assets). Nearly a quarter (22%) do report a deficit. There could be redundancy in these numbers reporting if multiple staff and board respond from the same organization. Of those with deficits, 36% report their fund balance is somewhat worse and 8% significantly worse than last year. Deficits improved for 24%.

The following chart notes the approximate[2] number of Providence nonprofit cultural organizations with accumulated deficits by type.

Providence Nonprofit Cultural Organizations with Accumulated Deficits



Section 5. Nonprofit Workers in Cultural Organizations

222 Workers in nonprofit cultural organizations answered questions in this section

Employment and insurance status Over half of responding cultural workers (57%) are full-time employees with employer-provided health insurance. Some 15% are part-time employees without benefits. Ten percent work as contractors and 6% are full-time employees without employer-provided health insurance.

Working multiple jobs Almost half (45%) of cultural workers must work multiple jobs to support themselves or their families. Fifty five percent work just one job.

Cultural worker needs The top need for responding cultural workers is increased earnings. Networking is the next most important need. Five needs are cited with nearly equal frequency: career advancement, retirement planning, health insurance, funding for professional training, and professional training. Mentoring and affordable housing are concerns for some.

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[2] Multiple representatives from the same organization could have responded to the survey.

Section 6. Arts Educators and Parents

663 Arts educators, parents, and others interested in education answered here

Education roles Parents of students are our largest group of respondents to this section. The next largest group is teaching artists, followed by classroom teachers, arts specialists, cultural organization educators, professors or higher education administrators, students, librarians, and school principals and administrators.

Arts education not equally accessible Few responding educators and parents (6%) believe that arts education is equally accessible throughout Rhode Island.

Arts enrichment programs Most educators report that schools with which they are familiar participate in arts enrichment programs in collaboration with artists and cultural organizations. The majority of schools participate in field trips to museums, field trips to performances, performances brought into schools. Most receive artists in residence. About half report museum programs brought into schools. Funding is the greatest perceived limit to cultural partnerships in schools. Other barriers are competition for time in school schedules and other school district priorities.

What is working well in arts education We asked the open-ended question, “What is working well to provide Rhode Island students with a good arts education?” The most frequent response, by far, is cultural organizations working in partnership with schools. Many others cite dedicated teachers and school staff. RISD is mentioned frequently. Parents and community support, artists working in schools, and private or charter schools. RISCA advocacy and funding is also mentioned.

What needs improvement in arts education We asked, “What about K-12 arts education could be improved?” The general call for more arts education opportunities in schools is by far the most frequent suggestion, followed closely by calls for adequate funding. Many cite the need to hire more arts specialist teachers. Other frequent suggestions include: more time devoted in schools to arts education, more artists in schools. Equal access to arts education throughout Rhode Island and dedicated arts classrooms are often cited. Some said, everything needs attention. Others recommend more field trips and other cultural experiences and improved arts curricula. A few suggest the need for improved overall quality of arts instruction, better arts integration with other disciplines, and more hands-on learning experiences.

Section 7. Business Owners and Managers

416 Business owners and managers answered questions in this section

Importance of culture to business location decisions Over half of responding business owners and managers (57%) thought access to arts and culture is an important consideration in locating or retaining businesses in Rhode Island. Of these, about a third (31%) thought access to culture was important and a quarter (26%) felt this was very important. Another significant group thought access to culture was less important: 22% thought access to culture was not at all important and 21% not very important to making business location decisions.

Importance of culture to retain workers Business leaders are evenly divided on the importance of arts and culture to attract and retain workers. Half (51%) believe access to arts and culture is not at all important or not very important in retaining workers. Another half (49%) believe culture is important (25%) or very important (24%) for workers.

Section 8. Creative Workers

728 Workers in creative enterprises answered questions in this section

Location The majority of responding creative businesses are located outside of Providence (61%).

Self employment The majority of creative businesses are organized as sole proprietorships, partnerships, or other forms of self employment. This means the creative sector is under-reported in labor statistics.

Creative industries Independent artists are the largest proportion (56%) of Rhode Island creative industries responding to our survey (including artists, musicians, craftspeople, actors, writers, or designers in any discipline, including broadcasting and media arts). Eleven percent are nonprofit cultural institutions or commercial creative businesses that produce creative goods and services. Nine percent are institutions or commercial businesses that are not creative by design, but depend on creative talent. Another nine percent are nonprofit and commercial institutions or commercial creative businesses that distribute creative products. Eight percent represent support systems including, school system's art education programs; arts agencies, community centers, arts service organizations, etc.

Creative occupations We asked creative workers to define their occupation using standard labor statistics job classifications[3]. The largest classification of creative workers

[3] Occupation categories are not all intuitive.
Visual Artists include: artists and related workers, designers, and photographers
Performing Artists include: actors, producers and directors, dancers and choreographers, musicians, singers, and related workers.

is visual artists. The next largest cluster is performing artists. Two other large groups include art, information, and cultural support workers and creative artists and writers. Craft artists are significant as are applied artists.

Creative work exported The largest market for 65% of creative workers is outside Rhode Island. The largest market is regional for 36%, followed by 35% local, 22% national, and 7% international.

Creative workers employed Half of creative workers (50%) are self employed and employ no additional workers. Twenty two percent employ 1-3 workers and 16% employ ten or more. Another 8% employ 4-6 workers and 4% employ 6-9 workers.

Creative workers' needs as employers Health insurance is the greatest need for creative workers. Many want tax incentives. Other needs are access to continuing professional education, business management assistance, and affordable housing.

Section 9. Demographics of Respondents

Age Respondents ages are well distributed. The largest cohort is 50-59 years.

Education Survey respondents are more highly educated than average. The largest survey cluster has a post-graduate education. The 2004 census estimate of RI education is 26% college graduates and the survey sample is 39% graduates.

Income The 2007 household incomes of respondents are generally high. The median range is $50,000 to $75,000. The 2004 census estimate of Rhode Island household's median income is $47,037.

Ethnicity Survey respondents are mostly white. Overall 88% of survey respondents are white. In Providence respondents are 83% white. The US Census 2006 estimate for Rhode Island is 89% white and for Providence is 55% white.

Gender Two thirds of respondents are female. The 2006 census estimate for Rhode Island is 52% female.

Applied Artists include: architects, archivists, curators, and museum technicians, announcers, editors, and technical writers.
Art, Information and Cultural Support include: advertising and promotions managers, public relations managers, librarians, assistants, and technicians, news analysts, reporters and correspondents, public relations specialists, media and communication workers, broadcast and sound engineering technicians and radio operators, television, video, and motion picture camera operators and editors, media and communication equipment workers, motion picture projectionists, advertising sales agents, desktop publishers, radio and telecommunications equipment installers and repairers.