Summary of Key Findings

MSR Public Opinion Survey: What Nebraskans Are Thinking About the Arts?

METHODOLOGY:
- 14 minute telephone survey, October 9 and 10, 2012
- 300 households completed surveys with equal representation from the state’s three congressional districts
- +/- 5.6% margin of error at the 95% confidence level

PARTICIPATION: 53% participated in a cultural event in the past 12 months as a participant, spectator, volunteer or donor.
- Arts participation in District 3 lags the other two.
- College-educated respondents are more likely to be involved.
- Those under 40 years of age and from 51-60 reported the highest levels of involvement.
- Those over 70 reported the lowest involvement, possibly due to their inability to attend arts venues.
- Of these, 57% reported that they were either involved in the arts as a child or had a child involved in the arts.
- Over 80% were likely to repeat attendance, indicating that first-time trial is a trigger to greater arts participation.
- In addition to the above participation, 46% have also engaged with the arts online.

PERCEPTION: When asked, 66% responded that they were aware of the NAC. Of those:
- 70% had a favorable opinion of the NAC, 30% neither favorable nor unfavorable, and 10% were unfavorable or didn’t know.
- 88% reported that the NAC logo represents an assurance of quality for the event.
- 29% reported that involvement of the NAC made them more likely to attend an event; 67% reported it has no influence.
- The NAC is perceived primarily as an educational (85%) or not-for-profit (75%) organization.
- 61% described the NAC as a grant-making organization, and 41% as a Nebraska State Agency.

ARTS EDUCATION: 86% reported that it is important for Nebraska schools to offer arts education.
- Of all respondents, 95% were parents. Of those, 84% have children involved in arts education at school, and 66% have children involved in arts outside of school such as private music, dance or art classes.

ARTS IMPACT: Respondents reported that the arts have a positive impact on:
- LIVABILITY of their community (85%).
- ECONOMIC IMPACT in their community (77%).
- DIVERSITY within their community (84%).
- PERSONAL GROWTH & CONTINUED LEARNING (73%).

COMMUNICATIONS:
- 92% learned about arts activities primarily via traditional media, ex: TV, radio, newspaper, billboards.
- 88% from arts venue or arts organization newsletters, brochures or emails.
- 56% from friends or word of mouth.
- 40% from Facebook or Twitter posts.

DONOR INTENT:
- 43% had donated money to an arts organization.
- 47% said they were likely to make a charitable gift of any kind to an arts organization in the future.
- 36% were aware that tax dollars in the state of Nebraska were currently used to directly fund the arts.
Summary of Key Findings

NAC Constituent Survey 2012

METHODOLOGY:
- Administered online via Survey Monkey, November 1 through December 7, 2012.
- Emailed invitation sent to 1268 constituents, 331 completed the survey for a 26% response rate.

DEMOGRAPHICS:
- Geography: District 1: 33%, District 2: 41%, District 3: 24%, Other: 2%.
- Age: 75% of all respondents were over 40 years of age. Largest single age group 51-60 (29%).
- Gender: 68% female, 32% male.
- Education: College (25%), graduate degrees (52%) or some graduate school (16%) – 98% post secondary.
- Race/ethnicity: 87% white, 2% African American, 2% Latino, 4% Multi, and 5% preferred not to answer.

PERCEPTION: 53% reported NAC involvement made them more likely to attend an event. 46% reported no influence.
- The NAC is perceived primarily as a grant making agency (38%) or educational organization (26%).
- 19% described the NAC as a not-for-profit organization, and 18% as a Nebraska State Agency.

SUPPORT & ENGAGEMENT: 55% participated in a cultural activity one or more times per month.
- Advocacy: 75% reported contacting an elected official in support of arts funding.
- NAC support for arts in your community is: Adequate 33%, Somewhat 50%, Not at all 6%, Don't Know: 11%
- 98% reported that it is important to have arts education in Nebraska schools.
- Multicultural arts programs are highly evident (37%) or somewhat evident (60%) in respondents’ communities.
- Support for NAC efforts to increase multicultural arts opportunities is very important (63%) or somewhat important (33%).

ARTISTS: 54% identified themselves as artists, of those:
- 45% are visual artists, 22% musicians, 12% literary, 9% theatre, 1% dancers.
- 23% pursue the arts as sole employment, 35% also engage in non-arts employment, and 34% don’t rely on arts for employment.
- Opportunities for artists have stayed the same (47%) or increased (36%) over the past three years.
- Major challenges facing artists are financial resources (44%) and exhibit/performance opportunities (18%).

ARTS ORGANIZATIONS: 58% identified themselves as representing an arts organization. Of those:
- 49% are on staff, 35% are board members, 15% volunteer.
- 32% are multidisciplinary, 22% visual arts, 18% music, 12% theatre.
- Attendance/participation has increased (52%) or stayed the same (31%) over the past three years.
- 74% reported organizational benefit from a grant or service from the NAC over the past three years.
- 96% reported that NAC funds are either very critical (78%) or somewhat critical (18%) to their organization.
- Respondents were very satisfied (76%) or somewhat satisfied (23%) with NAC programs and services.
- Major challenges facing organizations are funding (60%) and audience development (27%).

ARTS EDUCATORS: 39% identified themselves as arts educators. Of those:
- 34% teach in K-12 schools, 30% post-secondary, 23% for a nonprofit org., 23% are teaching artists.
- 46% are visual arts teachers, 19% music, and 12% multidisciplinary.
- Student enrollment in arts classes/workshops has stayed the same (50%) or increased (31%).
- Major challenges for arts educators: lack of time (35%), administrative support (23%), community support (22%).

Other Comments (n=57)
- Appreciative of NAC services (33), need for greater access (18), survey issues (11), more NAC visibility (5).
The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in the State of Nebraska (Fiscal Year 2010)

### Direct Economic Activity

<table>
<thead>
<tr>
<th>Total Industry Expenditures</th>
<th>Arts and Culture Organizations</th>
<th>Arts and Culture Audiences</th>
<th>Total Industry Expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$95,764,864</td>
<td>$78,624,668</td>
<td>$174,389,532</td>
</tr>
</tbody>
</table>

### Spending by Arts and Culture Organizations and Their Audiences Supports Jobs and Generates Government Revenue

<table>
<thead>
<tr>
<th>Total Economic Impact of Expenditures (Direct &amp; Indirect Impacts Combined)</th>
<th>Economic Impact of Organizations</th>
<th>Economic Impact of Audiences</th>
<th>Total Economic Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-Time Equivalent (FTE) Jobs Supported</td>
<td>4,042</td>
<td>2,431</td>
<td>6,473</td>
</tr>
<tr>
<td>Household Income Paid to Residents</td>
<td>$101,411,000</td>
<td>$56,457,000</td>
<td>$157,868,000</td>
</tr>
<tr>
<td>Revenue Generated to Local Government</td>
<td>$3,903,000</td>
<td>$4,418,000</td>
<td>$8,321,000</td>
</tr>
<tr>
<td>Revenue Generated to State Government</td>
<td>$4,891,000</td>
<td>$5,541,000</td>
<td>$10,432,000</td>
</tr>
</tbody>
</table>

### Event-Related Spending by Arts and Culture Audiences Toted $78.6 million (excluding the cost of admission)

<table>
<thead>
<tr>
<th>Attendance to Arts and Culture Events</th>
<th>Resident* Attendees</th>
<th>Non-Resident* Attendees</th>
<th>All Cultural Audiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Attendance to Arts and Culture Events</td>
<td>3,570,302</td>
<td>235,990</td>
<td>3,806,292</td>
</tr>
<tr>
<td>Percentage of Total Attendance</td>
<td>93.8%</td>
<td>6.2%</td>
<td>100%</td>
</tr>
<tr>
<td>Average Event-Related Spending Per Person</td>
<td>$17.20</td>
<td>$41.03</td>
<td>$18.67</td>
</tr>
<tr>
<td>Total Event-Related Expenditures</td>
<td>$36,250,369</td>
<td>$42,374,299</td>
<td>$78,624,668</td>
</tr>
</tbody>
</table>

### Nonprofit Arts and Culture Event Attendees Spend an Average of $18.67 Per Person (excluding the cost of admission)

<table>
<thead>
<tr>
<th>Category of Event-Related Expenditure</th>
<th>Resident* Attendees</th>
<th>Non-Resident* Attendees</th>
<th>All Cultural Audiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meals and Refreshments</td>
<td>$8.77</td>
<td>$15.60</td>
<td>$9.19</td>
</tr>
<tr>
<td>Souvenirs and Gifts</td>
<td>$2.41</td>
<td>$3.53</td>
<td>$2.48</td>
</tr>
<tr>
<td>Ground Transportation</td>
<td>$2.04</td>
<td>$5.99</td>
<td>$2.29</td>
</tr>
<tr>
<td>Overnight Lodging (one night only)</td>
<td>$1.64</td>
<td>$11.90</td>
<td>$2.28</td>
</tr>
<tr>
<td>Other/Miscellaneous</td>
<td>$2.34</td>
<td>$4.01</td>
<td>$2.43</td>
</tr>
<tr>
<td>Average Event-Related Spending Per Person</td>
<td>$17.20</td>
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<td>$18.67</td>
</tr>
</tbody>
</table>

* For the purpose of this study, residents are attendees who live within the State of Nebraska; non-residents live outside that area.

Source: Arts & Economic Prosperity IV: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in the State of Nebraska. For more information about this study or about other cultural initiatives in the State of Nebraska, visit Nebraskans for the Arts’s web site at www.NebraskansForTheArts.org.

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