

Discovering the Arts and Culture Audiences in Central Indiana

In the year 2000, nearly 7 million people attended Indianapolis area arts events (Arts Council of Indianapolis, 2001). The arts and culture sector contributes \$294 million annually to the local economy (Americans for the Arts, 2002), and it is a key component of Central Indiana's quality of life. In June 2001, Indianapolis Mayor Bart Peterson, in partnership with the Arts Council of Indianapolis, the Indianapolis Convention and Visitors Association, and Indianapolis Downtown, Inc., announced the implementation of the "Indianapolis Cultural Development Initiative." One goal of this multi-year initiative is to expand the existing arts audiences and to stimulate cultural participation by Indianapolis residents.

This issue brief is a study of public participation in the arts among member organizations of the Indianapolis Consortium of Arts Administrators (ICAA), a group of arts leaders who collaborate in an effort to build local and regional arts audiences. It is not, however, meant to be an exhaustive study of arts audiences in the region.

During the summer of 2001, researchers from the Center for Urban Policy and the Environment met with ICAA members to obtain membership and attendance data for an in-depth study of Central Indiana arts and culture audiences. (Central Indiana

includes 44 counties in an integrated economic region identified by the U.S. Bureau of Economic Analysis. See map on the back page.) To add to this information, we also reviewed the literature and studies of arts and culture policy and public arts participation. Our results will help arts and culture leaders and policymakers understand both existing and potential target audiences for the arts.

This research addresses the following questions:

- Where do the audiences for arts and culture events live?
- How far are participants willing to travel to Central Indiana arts and culture activities?
- What are the socioeconomic backgrounds of people in

these audiences? What are their likes and preferences?

All but one of the facilities included in this analysis are in Marion County, and most are in Center Township (Map 1). However, these facilities draw members and visitors from throughout the region. The highest concentrations of patrons live in northern Marion County and southern Hamilton County.

This pattern raises several issues for stakeholders:

First, the analysis suggests where arts and culture

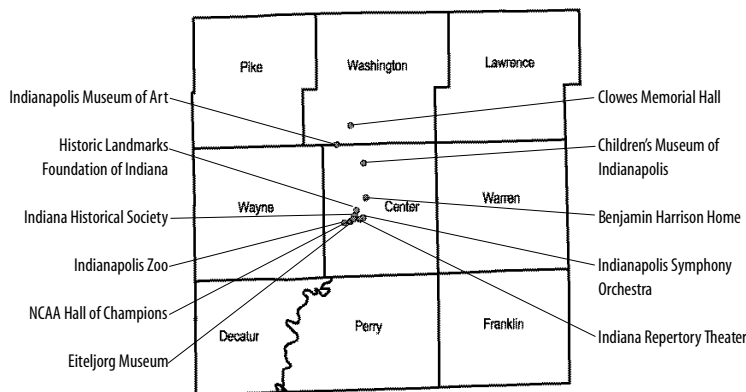
organizations that want to reach new audiences are most likely to find patrons similar to those they currently attract.

Second, the analysis identifies areas where smaller proportions of patrons live and that may be considered underserved.

For those who believe that arts and culture enhance quality

(continued on page 2)

Map 1: Marion County ICAA Arts and Culture Institution Locations by Township (Only participants that provided data for this study are shown.)



Note: Conner Prairie, located in Hamilton County, provided data for this study but is not pictured here.



(continued from page 1)

of life and who see these facilities as an economic development resource, our analysis suggests at least two questions:

- How can these assets be most effectively leveraged for the region, for their neighborhoods, and for arts and culture constituencies?
- Although local governmental investments in arts and culture are concentrated in Marion County and Center

Township, does the wider patronage suggest that other local governments or the state also have an interest in adequate support for these facilities?

Further studies could help inform these discussions.

However, the information we have gathered thus far offers an opportunity to inform decision makers and stimulate discussions of the role of arts and culture in Central Indiana.

Previous Studies Suggest That Both Geographic and Socioeconomic Factors Impact Arts and Culture Participation

The 1997 *Survey of Public Participation in the Arts* (SPPA) (National Endowment for the Arts, 1998) surveyed more than 12,000 adults throughout the United States about their attendance at arts and culture events, participation in the arts through the media, and personal performance and creation of art. We have summarized only SPPA results pertaining to attendance at arts and culture events.

The survey found that about one-half of U.S. adults had attended at least one of the following key art forms in the previous twelve months:

- jazz
- ballet
- opera
- classical music
- non-musical stage play
- dance other than ballet
- art museum or art gallery
- musical stage play or operetta

The art forms with the highest participation rates were art museums or galleries (35 percent) and musical stage plays (25 percent). The survey also addressed participation in three additional cultural activities: *reading literature, visiting historic*

parks or monuments, and visiting art or crafts fairs or festivals. Participation in these activities measured much higher than participation rates in the key art forms (about 63 percent, 47 percent, and 48 percent, respectively).

When looking at the home locations and socioeconomic characteristics of survey respondents, a number of patterns emerged. *The Geography of Participation in the Arts and Culture* (Schuster, 2000), a report extracted from the results of the 1997 SPPA, identified *education, income, and population density* as factors that impact public participation in the arts. According to Schuster, survey respondents who had at least a bachelor's degree were far more likely to participate in all of the arts and culture activity categories.

Median household income also had a strong positive relationship with participation in all of the arts forms. And the percent of population below the poverty level was negatively correlated with participation rates in nearly all of the arts and culture activities.

Overall, population density was not identified as a reliable predictor of arts participation. However, "percentage non-metropolitan" and "percentage rural" both showed strong negative correlations with participation in the arts.

Researchers from the Center for Urban Policy and the Environment surveyed more than 6,400 people from households in the 44-county Central Indiana region, and found that residents value Indianapolis area arts and culture facilities and are willing to travel from distant counties to visit them (Thelin, 2001; Sapp & Burow, 2001).



GIS Technology Helps Define Arts and Culture Audiences

Seventeen ICAA member organizations provided ZIP codes of their members and/or attendees. Center researchers used geographic information systems (GIS) technology to analyze these data for a geographic and demographic study of regional arts and culture audiences.

There are many inherent differences in the types of art form activities offered to the public (i.e., museums, plays, historic landmarks, etc.). There are also many differences in how different organizations with varying missions and budgets collect and maintain data. It is important to allow for such differentiation when interpreting these data. For example, ZIP code data about the members of museums and attractions such as the Indianapolis Zoo are readily available, but practical and financial reasons prevent the possibility of easily collecting ZIP code data about daily visitors. On the other hand, dance, music, and theater audiences often purchase tickets for individual events in advance, making attendance and visitor data easily available. Season pass holders (members) are fewer in numbers for these types of events, and the resulting small sample sizes make analysis difficult. Despite these differences, we were able to identify a number of commonalities as well as variations in arts participation that will be useful to stakeholders in the arts and culture arena.

Based on art form classifications developed in the 1997 SPPA and a set of arts and culture classifications identified by the Arts Council of Indianapolis (indyarts.org), we grouped the data sets into five categories: *dance*; *heritage and history*; *museums, galleries, and other attractions*; *music*; and *theater*. These data groupings are summarized in Table 1. Using GIS technology, we analyzed the geographic, demographic, and socioeconomic characteristics of these data by art form at both the regional and local levels. We also used *Census 2000* and *Sourcebook America 2002* (ESRI Business Information Solutions, 2002) in this analysis.

Table 1: ICAA Data Providers by Art Form

DANCE	
Butler Ballet*	Marion County
Dance Kaleidoscope	Marion County
HERITAGE AND HISTORY	
Benjamin Harrison Home	Marion County
Historic Landmarks Foundation of Indiana**	Marion County
Conner Prairie	Hamilton County
Indiana Historical Society**	Marion County
MUSEUMS, GALLERIES, AND OTHER ATTRACTIONS	
Indianapolis Museum of Art	Marion County
Children's Museum of Indianapolis	Marion County
Indianapolis Zoo	Marion County
NCAA Hall of Champions	Marion County
Eiteljorg Museum	Marion County
MUSIC	
Indianapolis Symphony Orchestra	Marion County
Indianapolis Chamber Orchestra*	Marion County
Indianapolis Opera*	Marion County
American Pianist Association	Marion County
THEATER	
Clowe's Broadway Series*	
(only includes performances at Clowe's venue)	Marion County
Indiana Repertory Theater	Marion County

* Indicates data provided by Clowes Memorial Hall.

** Headquarters is in Marion County with other historic sites located throughout Indiana.



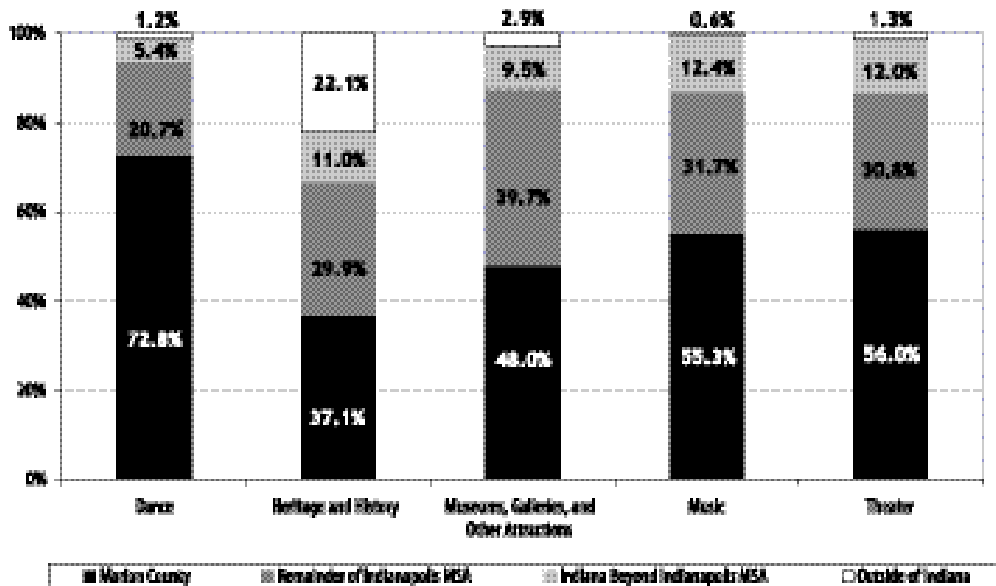
ICAA Arts and Culture Audiences Are Drawn from Metropolitan Indianapolis Communities, Other Regions, and throughout the State

An important element in building arts and culture audiences is gaining an understanding of the regions in which existing audiences are located. ICAA data indicate that, while a large portion of audiences for all art forms is located in Marion County, a significant portion of ICAA member audiences is located throughout the Indianapolis Metropolitan Statistical Area (MSA) and beyond. (See the note at the bottom of Figure 1 for an explanation of the Indianapolis MSA.) Figure 1 illustrates the distribution of arts and culture audiences by subregion.

Across all art form categories, the largest portion of audiences is located in Marion County, ranging from 37.1 percent for heritage and history to 72.8 percent for dance. One reason for the smaller portion of Marion County participants in heritage and history could be that the largest data set for this category came from Conner Prairie, located in Hamilton County. Additionally, membership to the Indiana Historical

Society and the Indiana Historic Landmarks Foundation includes access to other historic sites throughout the state of Indiana. For all art forms except heritage and history, more than 80 percent of the audiences is located within the Indianapolis MSA. More than 22 percent of the heritage and history audience, which includes statewide organizations such as the Indiana Historical Society and Historic Landmarks Foundation of Indiana, is located outside of Indiana. While less than 3 percent of the remaining art form audiences is located outside of Indiana, it is important to note that the members and attendees of Indianapolis arts and culture organizations are located throughout the United States. Map 2 illustrates the distribution of members of ICAA museums, galleries, and other attractions by state. The membership for this art form category includes residents from all but three states (Alaska, Louisiana, and South Dakota).

Figure 1: Percent of Membership and Ticket Holders by Art Form and Subregion, 2000–2001

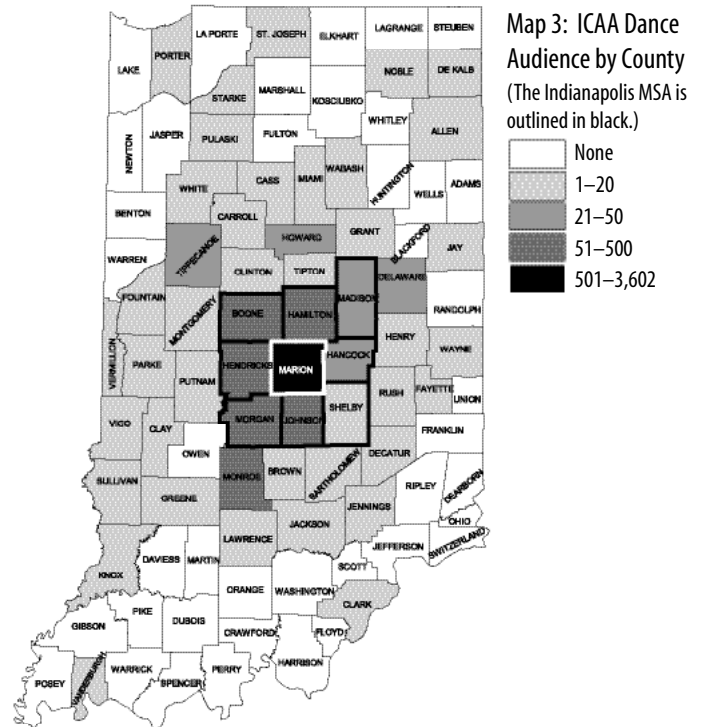


Note: The Indianapolis Metropolitan Statistical Area (MSA), as defined by the U.S. Office of Management and Budget, is a 9-county area that includes Boone, Hamilton, Hancock, Hendricks, Johnson, Madison, Marion, Morgan, and Shelby counties.



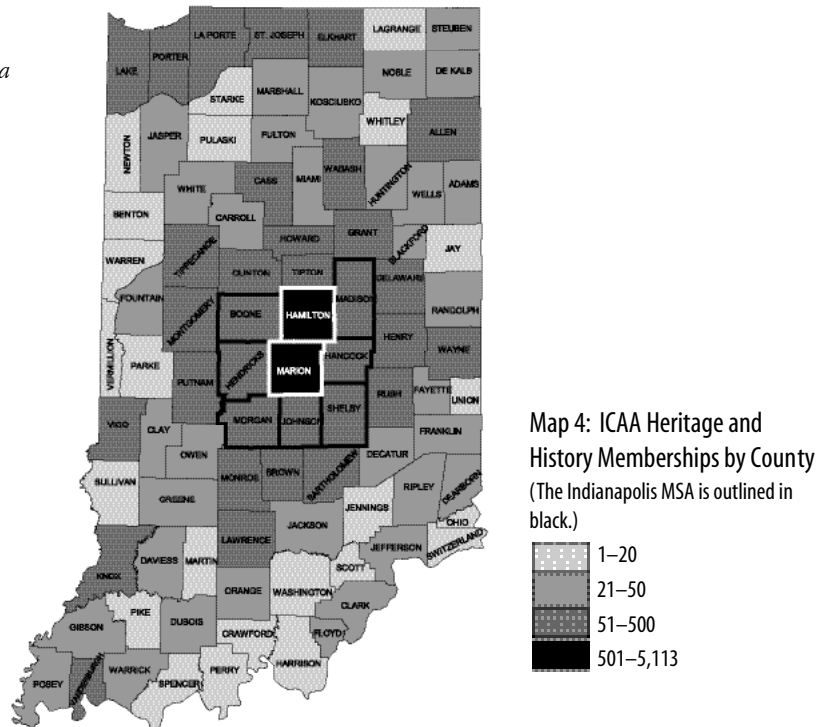
Participants by Indiana Counties

Evaluation of the geography of arts participation at the Indiana county level indicates that the highest density of ICAA arts participants falls within the 44-county Central Indiana region and, more specifically, within the 9-county Indianapolis MSA. This is true across all art forms except heritage and history—the members of this category are distributed more evenly throughout the state. Maps 3 through 7 illustrate the distribution of ICAA arts and culture audiences by county for the five art form categories. Both Marion and Hamilton counties represent the highest density of ICAA arts and culture participants across all art forms. (Data were provided by 17 ICAA member organizations located in Marion and Hamilton counties. Large portions of participants reside in each of the remaining Indianapolis MSA counties with the exception of Shelby County. This information provides no insight into arts and culture participation for other organizations in other counties.)



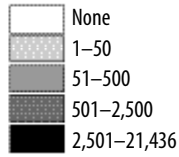
Source Data for Maps: Indianapolis Consortium of Arts Administrators (ICAA) 2000–2001 membership and ticket-holder data

For comparison of the areas shown here with the Central Indiana region, see the map on the back page.

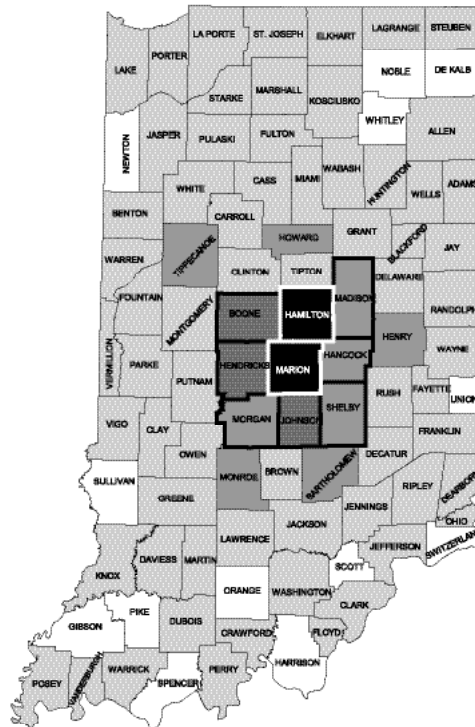
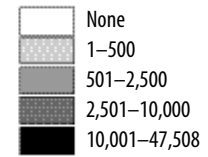




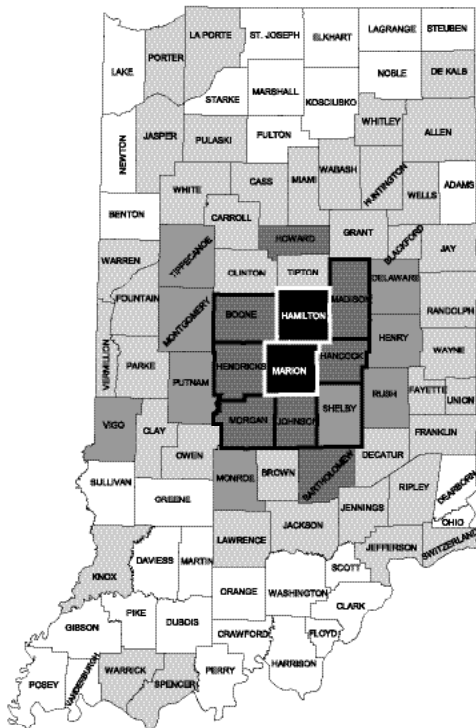
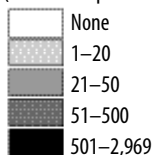
Map 5: ICAA Museums, Galleries, and Other Attractions Memberships by County
(The Indianapolis MSA is outlined in black.)



Map 7: ICAA Theater Ticket Holders by County
(The Indianapolis MSA is outlined in black.)



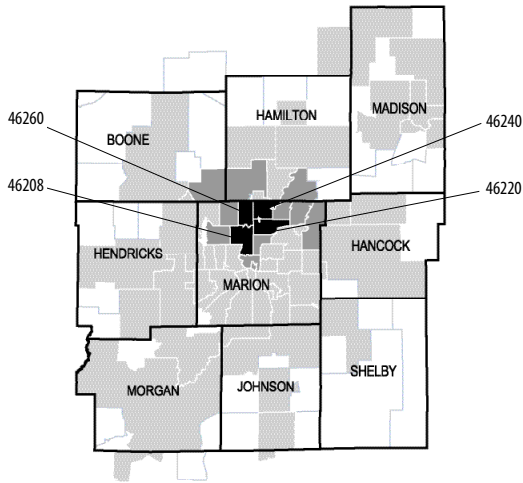
Map 6: ICAA Music Audience by County
(The Indianapolis MSA is outlined in black.)



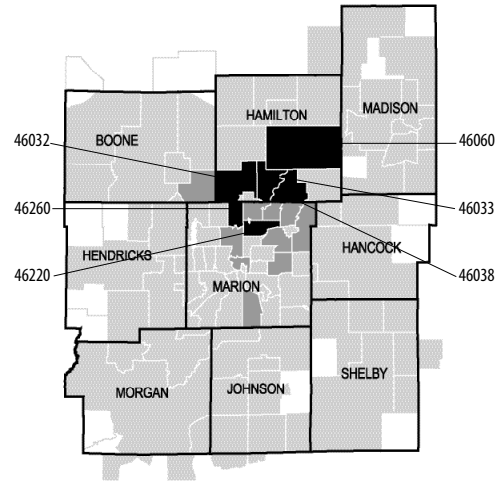
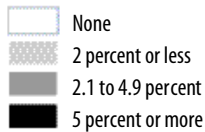


Participants by Indianapolis MSA ZIP Codes

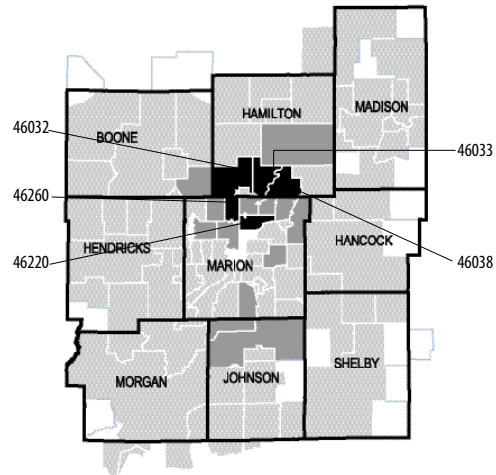
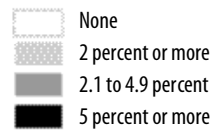
When looking closely at the ZIP code data, in general, we see that the largest percentage of ICAA arts and culture participants is located in northern Marion and southern Hamilton counties. This is true for all art form categories. Maps 8 through 12 illustrate the ZIP code distribution of participants by art form. A large percentage of participants also lives in southeastern Boone and northern Johnson counties.



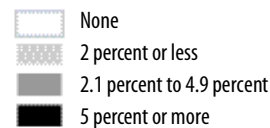
Map 8: ICAA Dance Audience by ZIP Code



Map 9: ICAA Heritage and History Memberships by ZIP Code



Map 10: ICAA Museums, Galleries, and Other Attractions Memberships by ZIP Code





Income and Education Are Key Determinants in Central Indiana Arts and Culture Participation

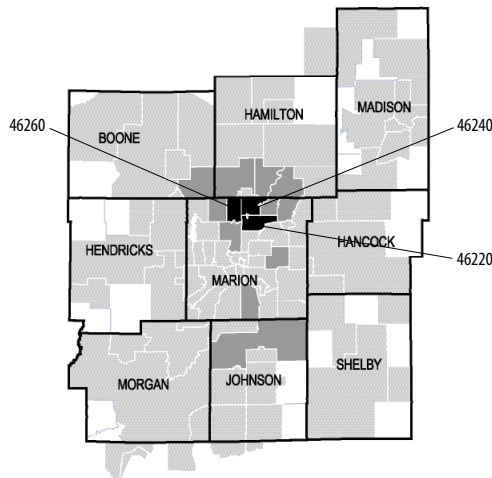
Data for the ZIP codes of a large percentage of members and attendees allow us to further analyze neighborhood and demographic characteristics of these areas. Table 2 (page 10) summarizes these descriptive variables by art form, including the dominant ACORN (A Classification Of Residential Neighborhoods) neighborhood type for all Indianapolis MSA ZIP codes that represent 5 percent or more of total membership and/or attendance.

Dominant neighborhood characteristics were evaluated using the ACORN market segmentation system extracted from the *Sourcebook America 2002* data set (ESRI Business Information Solutions, 2002). This system classifies U.S. neighborhoods into distinctive consumer groups. Classifications are determined through a cluster analysis in which neighborhoods with the most similar characteristics are grouped together based on more than 60 characteristics, including income, occupation, education, household type, age, race, home value, and other market variables used in forecasting consumer behaviors and preferences.

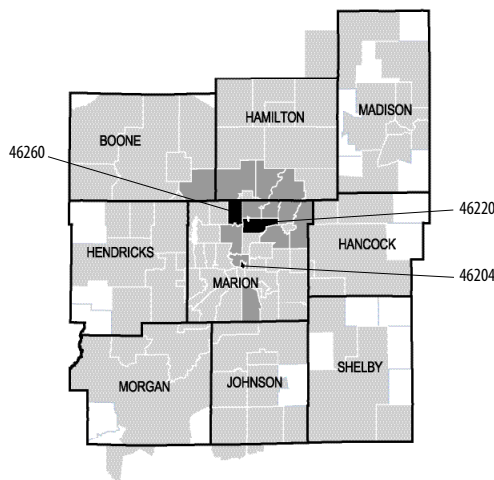
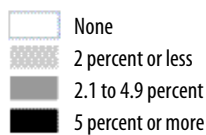
The 46220 ZIP code in northern Marion County, for example, is a common location for participants in all five art form categories. Median household income for this area (\$52,032) exceeds that of the Indianapolis MSA (\$45,025). The dominant ACORN neighborhood type in this area is Urban Professional Couples, representing more than 50 percent of all households in the 46220 ZIP code. This category primarily represents married couples with few or no children. Urban Professional Couples are highly educated and employed in professional or managerial positions. The median home value of this ACORN category is more than \$142,000. According to the ACORN classification system, some of the consumer preferences of these individuals include consuming imported wines, listening to classical music, traveling, and visiting museums.

The 46260 ZIP code, also located in northern Marion County, contains a large portion of arts participants across all art forms with the exception of museums, galleries, and other attractions. The dominant ACORN neighborhood type in this

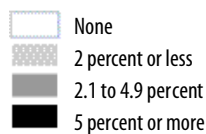
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Map 11: ICAA Music Season Pass Audience by ZIP Code



Map 12: ICAA Theater Ticket Holders by ZIP Code





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area is Enterprising Young Singles, representing nearly 44 percent of households in the 46260 ZIP code. Median household income in this area is \$50,397. Enterprising Young Singles are well educated, prosperous, and mobile. According to the ACORN neighborhood classification system, most of these individuals rent rather than own, residing in new apartment complexes built in the 1980s and 1990s. Some of the preferences of these individuals include physical fitness activities, dancing in nightclubs, visiting museums, theme parks and zoos, and playing computer games.

Large portions of the audiences for both heritage and his-

tory and museums, galleries, and other attractions are located in south central Hamilton County, including the areas of Carmel and Fishers. Residents in the 46032, 46033, and 46038 ZIP code areas make up more than 15 percent of the membership audiences for both of these art forms. Median household income in these areas, \$76,341, \$95,041, and \$72,722 respectively, is much greater than that of the Indianapolis MSA (\$45,025).

The dominant ACORN neighborhood type in both the 46032 and 46033 (Carmel) ZIP codes is Successful Suburbanites. These individuals are predominantly white, middle-aged, well educated couples with dual incomes and school-aged children. The median

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Table 2: Demographic Profile of Arts Participants by Art Form
ZIP Codes Containing 5 Percent or More of Total Membership/Ticket Holders

ZIP Code	City/Town	County	Percent of Members/Audience	Population in 2001	Per Capita Income	Median Household Income	ACORN CLASSIFICATION	
							Dominant Neighborhood Category	Percent of Households
DANCE								
46220	INDIANAPOLIS	Marion	12.8%	35,149	\$30,912	\$52,032	Urban Professional Couples	51.6%
46208	INDIANAPOLIS	Marion	6.9%	23,997	\$15,558	\$26,892	Hardtimes	35.9%
46260	INDIANAPOLIS	Marion	6.9%	31,472	\$27,861	\$50,397	Enterprising Young Singles	43.6%
46240	INDIANAPOLIS	Marion	5.2%	18,133	\$32,546	\$46,950	Enterprising Young Singles	29.8%
HERITAGE AND HISTORY								
46038	FISHERS	Hamilton	7.0%	43,543	\$33,077	\$72,722	Prosperous Baby Boomers	70.5%
46220	INDIANAPOLIS	Marion	6.4%	35,149	\$30,912	\$52,032	Urban Professional Couples	51.6%
46032	CARMEL	Hamilton	5.6%	36,235	\$36,304	\$76,341	Successful Suburbanites	39.9%
46033	CARMEL	Hamilton	5.5%	30,663	\$38,069	\$95,041	Successful Suburbanites	98.1%
46060	NOBLESVILLE	Hamilton	5.4%	45,212	\$24,649	\$51,010	Middle America	33.7%
46260	INDIANAPOLIS	Marion	5.3%	31,472	\$27,861	\$50,397	Enterprising Young Singles	43.6%
MUSEUMS, GALLERIES, AND OTHER ATTRACTIONS								
46220	INDIANAPOLIS	Marion	5.5%	35,149	\$30,912	\$52,032	Urban Professional Couples	51.6%
46033	CARMEL	Hamilton	5.5%	30,663	\$38,069	\$95,041	Successful Suburbanites	98.1%
46032	CARMEL	Hamilton	5.1%	36,235	\$36,304	\$76,341	Successful Suburbanites	39.9%
46038	FISHERS	Hamilton	5.0%	43,543	\$33,077	\$72,722	Prosperous Baby Boomers	70.5%
MUSIC								
46260	INDIANAPOLIS	Marion	7.0%	31,472	\$27,861	\$50,397	Enterprising Young Singles	43.6%
46220	INDIANAPOLIS	Marion	6.4%	35,149	\$30,912	\$52,032	Urban Professional Couples	51.6%
46240	INDIANAPOLIS	Marion	5.5%	18,133	\$32,546	\$46,950	Enterprising Young Singles	29.8%
THEATER								
46220	INDIANAPOLIS	Marion	7.0%	35,149	\$30,912	\$52,032	Urban Professional Couples	51.6%
46204	INDIANAPOLIS	Marion	5.3%	6,386	\$13,833	\$35,284	Active Senior Singles	47.0%
46260	INDIANAPOLIS	Marion	5.1%	31,472	\$27,861	\$50,397	Enterprising Young Singles	43.6%
INDIANAPOLIS MSA*				1,637,290	\$22,867	\$45,025		

*The Indianapolis MSA is included for comparison. Because it is a different type of area (an MSA rather than a ZIP code area), data for all categories would not be applicable.



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home value of people in this ACORN category is \$210,500, twice the national average. They live in newer, suburban developments, and more than 30 percent commute across county or state lines to work. The ACORN system identifies consumer preferences of Successful Suburbanites as driving minivans and luxury cars, playing golf and tennis, and attending concerts and movies.

The dominant ACORN neighborhood type in the 46038 (Fishers) ZIP code is Prosperous Baby Boomers, representing more than 70 percent of all households in this area. These individuals, born between 1949 and 1964, are dual income families

with primarily preschool and grade school age children. More than 70 percent of the households in this category have at least two workers. The median home value of this ACORN category is \$124,700. Prosperous Baby Boomers also live in newer, suburban developments within commuting distance to metropolitan employment. The ACORN classification system suggests that some of the preferences of Prosperous Baby Boomers include participating in sports and other athletic activities such as golf, tennis, and aerobics; playing computer games; and visiting theme parks and gambling casinos.

Centrally Located Venues Serving Regional Audiences Raises Questions

As observed before in this issue brief, the patterns of membership and attendance revealed in this analysis suggest questions for those who operate arts and culture institutions and for those who view them as important assets for improving the quality of life in the region and for attracting investments and human energy.

Our study reveals that large numbers of Central Indiana arts and culture participants live in the Indianapolis MSA, while smaller numbers of participants travel from distant counties in the 44-county Central Indiana region and beyond. Additionally, a large percentage of ICAA arts and culture audiences resides in northern Marion and southern Hamilton counties and tends to be wealthier and more highly educated than the overall population. Some important questions for decision makers are:

- Should future plans to build on existing arts audiences focus on populations similar to people who are currently participating, or should resources be allocated to target populations who are underrepresented and, perhaps, underserved?
- Would it be desirable to locate more arts and culture opportunities closer to the audiences who do not live near the current central locations?

Local arts and culture leaders and policymakers will need to answer these questions as they work to meet the goals of the Indianapolis Cultural Development Initiative.

Arts and culture facilities are financed from several sources, including membership and admission charges, gifts, endow-

ments, and governmental appropriations. Nonprofit organizations such as the arts and culture organizations analyzed here also benefit from exemption from property, sales, and income taxes. The high concentration of nonprofit and public buildings in Center Township is estimated to remove approximately half the property from tax rolls, leading to higher tax rates to finance public schools, local government services, and investments in infrastructure. Arts and culture facilities are assets in the quality of life of the region. The facilities also are generally believed to be increasingly important for retaining and attracting well educated citizens and, through them, dynamic employers. Yet arts and culture facilities also can have negative impacts in their immediate neighborhoods—for example, they may increase traffic and displace residents and businesses. How should the critical assets represented by arts and culture facilities be best developed for their neighborhoods, for effective financing, and for a positive impact on the region?

What are the appropriate venues for developing and advancing policies concerning arts and culture facilities? Each such organization, from the American Pianist Association through the Indianapolis Zoo, to the NCAA Hall of Champions, must make decisions regarding how best to achieve its mission. All may benefit from a coordinated, strategic approach. The Indianapolis Consortium of Arts Administrators is one arena in which voluntary cooperation can be nurtured. As questions about public policy and public finances arise, what are the appropriate arenas for discussion and decision?



Central Indiana's Future: Understanding the Region and Identifying Choices

Central Indiana's Future: Understanding the Region and Identifying Choices, funded by an award of general support from Lilly Endowment, Inc., is a research project that seeks to increase understanding of the region and to inform decision-makers about the array of options for improving quality of life for Central Indiana residents. Center for Urban Policy and the Environment faculty and staff, with other researchers from several universities, are working to understand how the broad range of investments made by households, governments, businesses, and nonprofit organizations within the Central Indiana region contribute to quality of life. The geographic scope of the project includes 44 counties in an integrated economic region identified by the U.S. Bureau of Economic Analysis.

The Center for Urban Policy and the Environment is part of the School of Public and Environmental Affairs at Indiana University–Purdue University Indianapolis. For more information about the Central Indiana Project or the research reported here, contact the Center at 317-261-3000 or visit the Center's Web site at www.urbancenter.iupui.edu

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Central Indiana Region



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