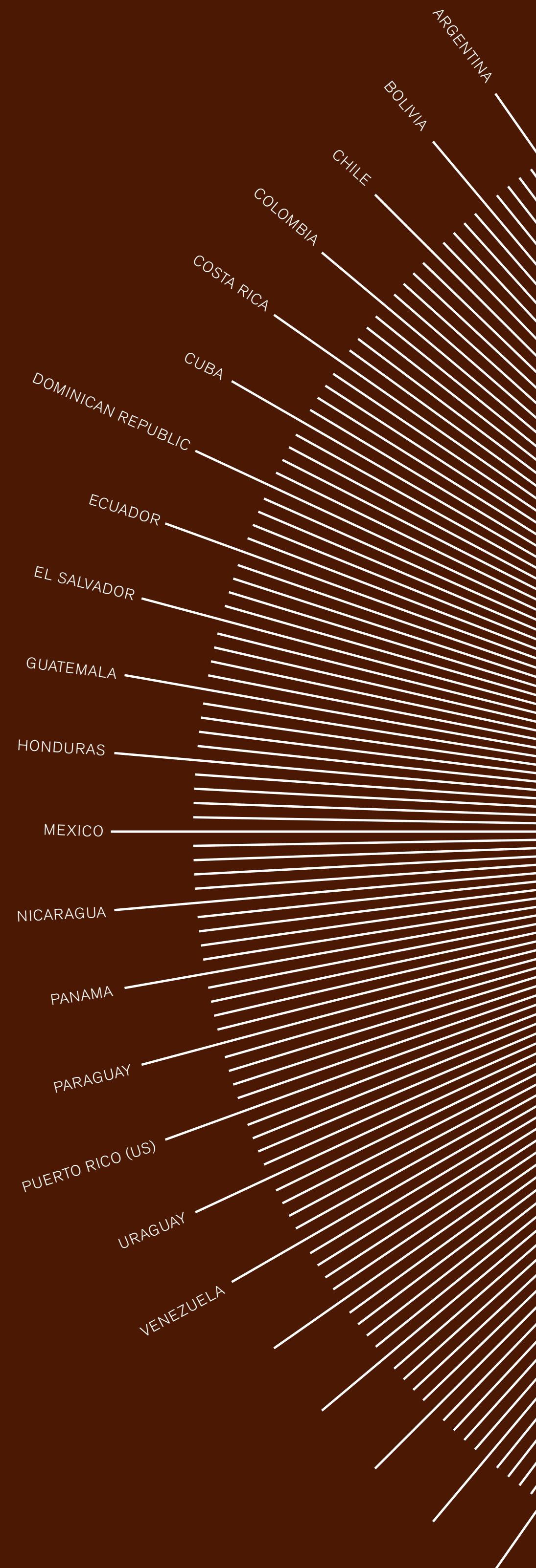

ARTS, CULTURE AND THE LATINO AUDIENCE

Latino Arts and Culture Participation in the Greater Phoenix Region

MPAC | MARICOPA PARTNERSHIP FOR ARTS AND CULTURE

Latino Perspectives magazine

DEAR COLLEAGUES

Arts, Culture, and the Latino Audience is timely and relevant. Understanding this shifting demographic will allow arts and culture organizations to make better informed marketing and programming decisions that can result in increased Latino attendance and participation, increased revenues, and cultivation of relationships with an untapped donor base while contributing to enhancing the quality of life of this market segment.

The data presented will provide an unprecedented look into the Latino market and the segments within it and provide useful, timely and actionable intelligence you can include in your marketing plans today.

MPAC positions itself, yet again, as a pioneer in disseminating critical information that the arts community can act upon. Latino Perspectives Media has sought to engage the attention of arts and presenting organizations and to inform our readership about the many and varied opportunities to live and experience art in Maricopa County. This study further validates our mission and positions the college educated, acculturated, and upwardly mobile segment of the Latino community we serve at the center of its findings.

Congratulations to MPAC on the unveiling of this landmark study.

Saludos,
Ricardo Torres
Pub/CEO, Latino Perspectives Magazine

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DEAR COLLEAGUES

Arts, Culture, and the Latino Audience is one of the few in-depth studies in any United States market of Latino participation in arts and culture, and the first of its kind in Greater Phoenix. This growing and fundamental market continues to be of great interest to the region's arts and culture community, but it remains one of the least understood. How to develop strategies to move from a market lost to a market opportunity is the impetus for this report.

Prepared for the Maricopa Partnership for Arts and Culture by Behavior Research Center and ArtsMarket, the study is designed to gain an understanding of the Latino arts and culture consumer as a nuanced and multi-segmented market. Through in-depth telephone interviews and focus groups the research team explored motivations for participating – or not – in the region's arts and cultural offerings, factors that impact attendance patterns, and opportunities to enhance Latino engagement.

The Latino audience already has a significant financial impact, infusing over $100 million annually as attendees at Greater Phoenix arts and culture events and attractions. Imagine what this untapped market could contribute if fully engaged. It is MPAC's hope that the research and recommendations contained in this study will catalyze new approaches to identifying and reaching the Latino cultural consumer. We are pleased to have had the opportunity to support this effort on behalf of the arts and culture community.

MYRA MILLINGER, President and CEO, MPAC

THE LATINO AUDIENCE ALREADY HAS A SIGNIFICANT FINANCIAL IMPACT, INFUSING OVER $100 MILLION ANNUALLY AS ATTENDEES AT GREATER PHOENIX ARTS AND CULTURE EVENTS AND ATTRACTIONS. IMAGINE WHAT THIS UNTAPPED MARKET COULD CONTRIBUTE IF FULLY ENGAGED.

— MYRA MILLINGER, PRESIDENT AND CEO, MPAC

ARTS, CULTURE AND THE LATINO AUDIENCE.

THE LATINO ARTS AND CULTURE MARKET IS COMPLEX

It is large, vibrant and full of potential for the arts and cultural organizations of Greater Phoenix. It is also under marketed; the potential is currently not being realized. The research for this study, however, suggests ideas on how to attract and nurture a market that is now 30% of the metropolitan population.

THIS STUDY OF LATINO PARTICIPATION IN THE ARTS AND CULTURE OF GREATER PHOENIX HAD TWO PHASES

PHASE 1
Fall of 2007: an in-depth telephone survey of 1,200 self-defined Latinos, at least 18 years old, who reside in Greater Phoenix.

PHASE 2
Spring of 2008: seven focus groups to explore Latino attitudes towards key issues identified in the telephone survey.

Louise K. Stevens, president of ArtsMarket and a nationally recognized expert on arts consumers, advised Behavior Research Center during the development and analysis of the telephone survey.

HOW DO LATINOS REACT TO THE MARKETING BY VALLEY ARTS AND CULTURE ATTRACTIONS?

Latinos use all forms of media advertising and especially the Internet to find out about arts and cultural opportunities. However, very often Latinos do not "see" arts and culture advertising because it does not show them in culturally sensitive depictions. As a result, many Latinos feel that arts and culture organizations do not market to them, that they are not wanted as participants.

WHO IS THE LATINO ARTS CONSUMER?

The traditional segmentation of Latino arts and culture consumers by language (Spanish dominant, Bilingual, English dominant) is better described by a new market structure consisting of Learners, Straddlers and Trendsetters. In addition, Latino arts consumers operate differently depending on whether they are a family with children, adults by themselves, older/retirees, or younger/singles.

WHAT DO LATINOS CURRENTLY ENJOY?

Latinos are active cultural consumers. Their interests are very similar to those of non-Latinos, except that many also have great interest in events and attractions related to their own culture, such as Latino music events, dance performances, festivals and craft fairs. Forty-one percent attend history, science or children's museums, 22 percent visit art exhibitions, 11 to 14 percent attend non-Latino performing arts events.

SUMMARY OF FINDINGS...

"THE VALUE OF GOING TO A MUSEUM IS WHAT IT DOES FOR YOU: RELAXATION, SATISFYING CURIOSITY, SEEING THE KIDS ENJOYING THEMSELVES, SPENDING QUALITY TIME WITH THE FAMILY."

– FOCUS GROUP PARTICIPANT

HOW DO LATINOS DECIDE WHAT TO ATTEND?

There is great potential for Latino audience development because the Latino interest in arts and culture outpaces actual attendance by as much as two to one. Many factors enter into the attendance decision such as cost, the perception of a casual, inviting atmosphere and weekend availability for families. The attendance decision is usually spontaneous and close to the time of the event.

HOW MUCH DO LATINOS CURRENTLY SPEND ON ARTS AND CULTURE?

Latinos spend an estimated $118 million annually on arts and culture in Greater Phoenix. The research suggests that arts and culture organizations should target their marketing to the 41 percent of Latinos who either attend what they self describe as "big" events all year or who save up to attend a few of these big events. Price is often more of a perceived than an actual attendance barrier.

WHO IS

THE LATINO ARTS AND CULTURE CONSUMER?

As research on Latino markets has progressed in recent years, there has been an evolution in segmentation thinking …moving from the once widespread tendency to characterize it as a monolithic market in which one size fits all, to a finer and more appropriate understanding that the Latino market is comprised of many layers, segments and dynamics.

Most marketers recognize the need to segment the Latino market relative to its most obvious acculturation marker: language skills. Many marketers understand the broader implications between Latinos who are Spanish dominant, those who are Bilingual, and those who are English dominant and who, although they may speak little or no Spanish, nonetheless think of themselves as Latino and maintain an affinity for the traditional or emerging Latino culture and styles.

This study suggests that another dimension should be added to our thinking when pondering questions of how to market arts and culture opportunities to Latinos. We may benefit our strategic thinking by also weighing the perceived importance of arts and culture in the lives of Latinos. The study shows that interest in arts and culture products cuts strongly across all groups while participation is dampened not by interest or desire, but by barriers that trace to price, struggles to make a living and even belief that arts and culture organizations may not offer hospitable environments for people who are Latino.

WE MAY BENEFIT OUR STRATEGIC THINKING BY ALSO WEIGHING THE PERCEIVED IMPORTANCE OF ARTS AND CULTURE IN THE LIVES OF LATINOS.

Latinos find ways to satisfy their cultural and entertainment thirsts, albeit at a less frequent level than would be found if perceived cost and other barriers were not in play. The findings clearly raise the question of whether traditional marketing and ticket offering methods are appropriate for any but the most acculturated and affluent segments of this market ... and whether non-traditional approaches would better serve both the arts and culture organizations and the market.

FOCUS GROUP PROFILE OF THE BILINGUAL AND ENGLISH DOMINANT LATINO ARTS AND CULTURE CONSUMER

The six focus groups with Bilingual/English dominant Latino arts and culture consumers indicated that they are more like general arts and culture consumers than they are different. They are older, more affluent, and have more education. However, they are not monolithic; they consist of four sub-markets: families with children, adults by themselves, older/retirees, younger singles. As with the general arts consumers, special interests (e.g. jazz music) can cross over many of these sub-markets.

However, Latino arts and culture consumers are unique in several important ways. The feelings expressed in the groups indicate that many demand recognition of their culture, or they will limit or withhold their attendance. The younger consumers are more intent on exposing themselves and especially their children to arts and culture. Many are determined to cut through the ethnic bias often perceived in the arts and cultural world. They want to see images that say "we are visible, we have hard earned money to spend." Importantly, they will try something new in response to promotions that help them see value for their dollar.

A NEW FRAMEWORK FOR ARTS MARKETING TO LATINOS

AS A RESULT OF THIS RESEARCH, IT MAY BE RELEVANT TO REDEFINE THE LATINO MARKET, RELATIVE TO ARTS AND CULTURE MARKETING, ALONG THE FOLLOWING LINES:

OLD THINKING

SPANISH DOMINANT	35%*
BILINGUAL	39%*
ENGLISH DOMINANT	26%*

NEW THINKING

LEARNERS

These un-acculturated Latinos need source information about products and services new to their lives.

THEY ARE FLEDGLING CULTURAL CONSUMERS SEEKING AFFORDABLE OPPORTUNITIES. THEY ARE MOST LIKELY FOREIGN BORN AND SPANISH DOMINANT BUT MAY ALSO HAVE SIGNIFICANT MIDDLE INCOME SEGMENTS. (ALTHOUGH NOT SURVEYED, THERE IS ALSO A GROWING SEGMENT OF THE SPANISH DOMINANT MARKET THAT IS SOPHISTICATED AND AFFLUENT.)

STRADDLERS

Transitional bilinguals are cultural experimenters in the process of re-defining themselves and identifying cultural forms with which they want a relationship.

THEY ARE FULLY BILINGUAL AND INCLUDE ENGLISH LEARNERS AND FOREIGN BORN, MIDDLE INCOME AND ABOVE WITH GROWING FAMILY BUDGETS. THEY SEEK AND MAY BE RESPONSIVE TO NEW PURCHASING OPTIONS. THEY ARE "STRADDLERS" ... CONSUMERS HAVING ONE FOOT IN THEIR OLD CULTURAL TRADITIONS AND THE OTHER IN THE NEW ... AND READY TO MAKE A JUMP.

TREND SETTERS

These Latinos are English dominant who seek distinctiveness and are responsive to advertising that recognizes their cultural values and personal goals.

I AM LATINO! THESE CONSUMERS ARE NORMALLY DEFINED BY U.S. NATIVITY, HIGHER INCOMES, DISPOSABLE INCOME AND EDUCATION ATTAINMENT, BUT IN OTHER WAYS THEY ARE AMONG THE HARDEST TO PROFILE. AT ONE AND THE SAME TIME, THEY ARE FULLY INVOLVED IN CONTEMPORARY AMERICAN CULTURE YET RETAIN AFFECTION FOR THE CULTURE OF THEIR ETHNIC ROOTS AS EXPRESSED IN MODERN FORMS. FOR THEM, PRIDE IN CULTURE IS FOCUSED ON LATINO CULTURAL TRENDS, STYLES AND ICONS OF TODAY IN AMERICA. HONORING THIS PRIDE AND THE ICONS OF THIS PRIDE IS TAKEN AS RESPECT. AND BECAUSE TREND SETTERS MAY EXERT A STRONG "PULLING" INFLUENCE ON "STRADDLERS" THEIR ICONIC VALUE IN MARKETING IS POTENT.

** PROPORTION OF SURVEY RESPONDENTS WHICH IS PROJECTABLE TO ALL 18+ LATINOS WITH LAND LINE TELEPHONES IN GREATER PHOENIX.*

FOCUS GROUP PROFILE OF THE SPANISH DOMINANT ARTS AND CULTURE CONSUMER

The one focus group with Spanish dominant arts and culture consumers verified indications from the 2007 Baseline Latino Survey that they are a separate and unique market. Participants in this group rarely attend cultural events or museums if the programs are not in Spanish or if the programs carry high ticket prices. They tend to be insular and prefer the company of other Spanish speakers. They tend to be neighborhood oriented for events, and they become aware of event choices through word of mouth, Spanish flyers and Spanish media advertising.

In addition to language, affordability also controls their choices of what cultural events to attend. They are highly reactive to discounts and other kinds of promotion.

As would be expected, these Latinos are wary of the attitudes of some who assume that all Spanish speakers are "illegal."

WHAT DO

LATINOS CURRENTLY ENJOY?

The survey asked Latinos whether and how often they or members of their immediate family had attended each of 22 cultural/entertainment events during the past 12 months. This question structure more accurately reflects household activity than do questions that only ask about the activities of one adult. The attendance percentages of Learners (Spanish dominant), Straddlers (Bilingual) and Trend Setters (English dominant) shows the effects of acculturation. This analysis reveals the following overall patterns.

OBSERVATION 1

Latinos are active cultural consumers with 20 to over 60 percent of families active in 15 of the 22 categories. The major influences on attendance are language, cost, awareness and available time.

OBSERVATION 2

All Latinos have a strong proclivity toward outdoor activities. Two outdoor categories are the most widely attended: zoos and botanical gardens (58%); amusement parks, state fairs and carnivals (61%).

OBSERVATION 3

Within the arts and culture category, 41 percent of family members attended museums, and 22 percent visited art exhibitions or galleries. Attendance at plays, opera, symphony, pops events and dance are lower, in the 10 to 15 percent range. Learner attendance for these events is quite low because of cost/language problems but more than doubles for Straddlers and Trend Setters.

OBSERVATION 4

School related arts and culture events (43%) and church based music performances (29%) touch many Latinos. Both are family related and are generally low cost.

OBSERVATION 5

In all but three activity categories, participation rises significantly with bilingual and English proficiency, which may also reflect economic and age factors. However, where language and expense are not major concerns, Learners attend at about similar rates as Straddlers and Trend Setters, e.g. zoos and amusement parks (57%, 58%, 60%), Latino music concerts (30%, 36%, 25%), and Latino Folkloric events (40%, 45%, 40%).

OBSERVATION 6

The majority of Latino families (64%) have children living at home, and among these 34 percent report children involved in arts education activities, mostly graphic arts, music or dance.

OBSERVATION 7

Not shown in the table is attendance relative to a family's income level. The research shows some skew of higher attendance among the most affluent Latinos, but in the middle and lower income categories, attendance patterns are more uniform between categories.

FINDINGS:

20% TO OVER 60% OF FAMILIES ARE ACTIVE IN 15 OF THE 22 CATEGORIES

INFLUENTIAL FACTORS:

LANGUAGE

COST

AWARENESS

AVAILABLE TIME

ARTS AND CULTURE EVENT ATTENDANCE BY LATINOS

% OF FAMILIES WITH ANY MEMBER ATTENDING IN PAST 12 MONTHS

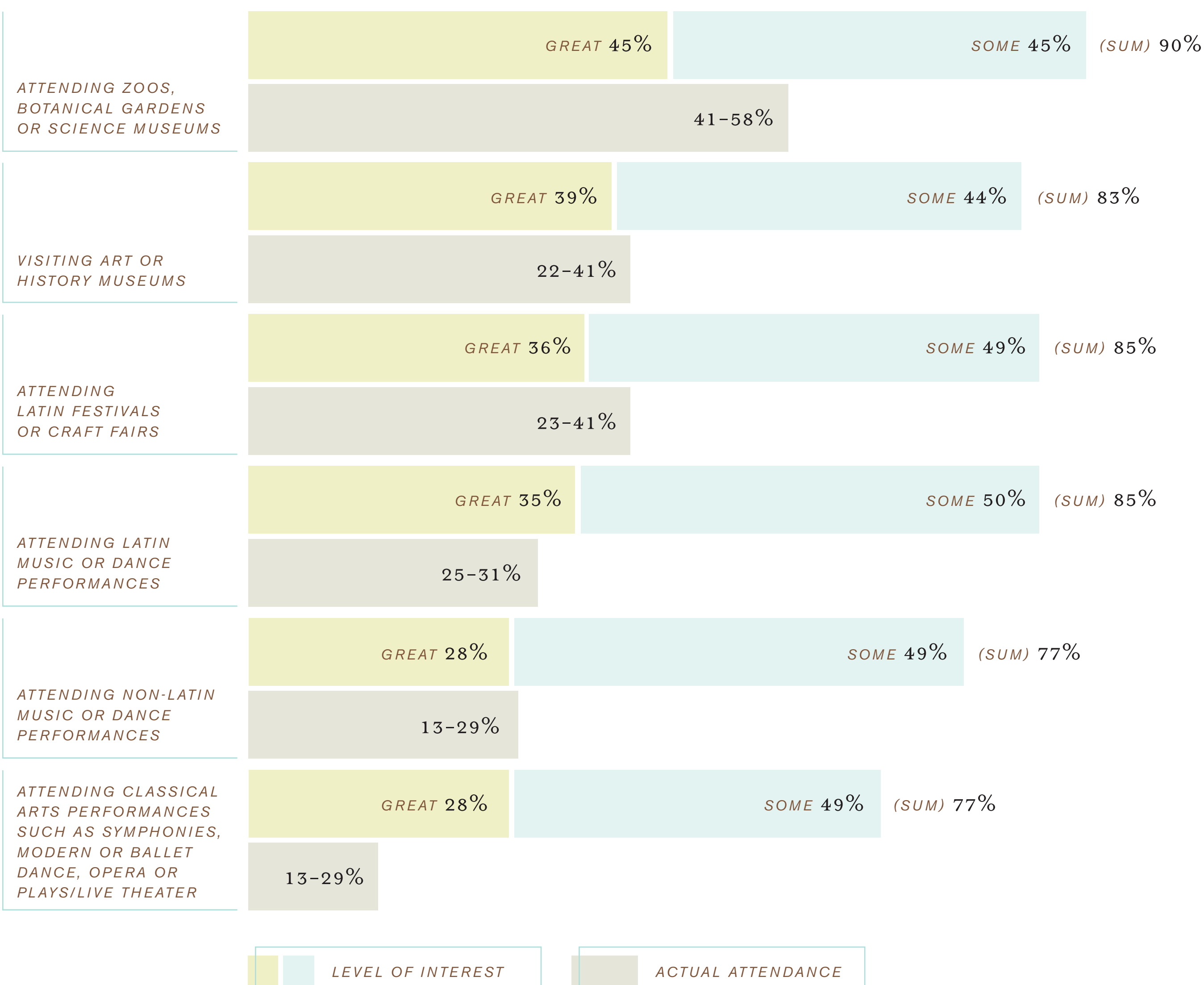
		ALL	LEARNERS (SPANISH DOMINANT)	STRADDLERS (BILINGUAL)	TREND SETTERS (ENGLISH DOMINANT
1	Amusement park, state fair or carnival	61%	54%	63%	69%
2	Zoo or botanical garden	58	57	58	60
3	College or professional sports event	47	35	49	59
4	Child's school play, dance performance or art show	43	36	45	51
5	Latino Folkloric event or festival such as Cinco de Mayo	42	40	45	40
6	History, science, children's or other type of museum	41	27	45	53
7	Neighborhood festival or arts and craft fair	32	24	36	36
8	Out-of-school child's play, dance performance or art show	32	19	38	41
9	Ranchero, norteño or mariachi concert or club performance	31	30	36	25
10	Church-based music performance separate from a regular service	29	22	34	30
11	Auto or specialty car show	26	17	32	31
12	Big name Latino music performance	25	16	34	22
13	Folk or ethnic music event or festival	23	13	29	25
14	Rock or hip-hop concert or club performance	22	8	26	33
15	Painting, sculpture, photographic or other fine art exhibit or gallery	22	11	28	27
16	Folk or ethnic dance performance	18	7	23	24
17	Dramatic play	14	7	17	21
18	Jazz or blues concert or club performance	14	7	17	19
19	Ballet or modern dance performance	13	7	17	15
20	Holiday pops concert	11	4	17	11
21	Opera, symphony or other classical music event	11	6	14	11
22	Performance of a Broadway play	11	4	16	13

HOW DO

LATINOS DECIDE WHAT TO ATTEND?

INTEREST IS TWO TIMES ACTUAL ATTENDANCE

Obviously, the key to the attendance decision is interest in what the arts and culture organizations are presenting. One can see the potential of the Latino market by comparing the interest levels in various arts and culture activities with the attendance levels cited on the previous page. For each category shown below, interest is substantially greater than attendance, more than double for many categories. This untapped interest represents great visitor and audience potential for arts and culture organizations.



DECISION FACTORS

"I LIKE TO FIND THINGS TO PIGGYBACK ON WHAT THE KIDS ARE LEARNING IN SCHOOL."

– FOCUS GROUP PARTICIPANT

FACTOR 1

The word "casual" was often used during focus groups to describe an inviting atmosphere; anything that implies "not casual" was off-putting.

FACTOR 2

Great sensitivity is expressed about situations that are welcoming and comfortable for the largest Latino sub-market, families with children, such as open air events in parks or special times for children. On the other hand, the other Latino sub-markets are similar to the general market in their desires to attend theater, indoor concerts, dance, etc.

FACTOR 3

Since cost is significant to most but not all Latinos, discounts and special offers are very attractive, almost mandatory, to get trial. For example, in the focus groups there was good reaction to promotional ideas such as involving cross event couponing from a museum to the zoo.

FACTOR 4

It is often said that most Latino families go to arts and culture events, "with the whole family," a view that may discourage some organizations from pursuing ticket sales to people who want to bring the children. In fact, it appears, especially among Latino arts and culture event consumers, that about half are not inclined to go to such events with the family. As a socially correct value, close to 60 percent think going with the entire family is the right thing to do, but when asked to parse out a $300 windfall on cultural or entertainment events, only 41 percent allocate the money to "entire family" activities. Bilingual Latinos, empty nesters and Latino adults over the age of 50 are more likely to treat themselves rather than the whole family.

FACTOR 5

On the other hand, with half definitely inclined to include the entire family, opportunity exists for some organizations to promote "family friendly" and "family affordable" events.

FACTOR 6

Nine of ten say "Latino culture/entertainment" is important to them and eight of ten say the same about non-Latino culture and entertainment.

9 OUT OF 10

SAY LATINO CULTURE/ ENTERTAINMENT IS IMPORTANT TO THEM

8 OUT OF 10

SAY THE SAME ABOUT NON-LATINO CULTURE/ ENTERTAINMENT

WOMEN LAY OUT THE ALTERNATIVES ▸ *JOINT DECISION WITH HUSBANDS & KIDS*

DECISION PROCESS IS VERY SPONTANEOUS

In four of ten households, the decision to go to an arts or culture event is a family decision, in a third of cases it is a joint spousal decision. It became very clear in the focus groups that women are the primary decision makers (similar to the general market). The decision to attend happens just days before events or even the same day. The woman will lay out the alternatives, and a joint decision with husband/children will follow.

ANNUAL SPENDING PROJECTIONS

Category	Annual Dollars Spent	Avg Expenditure per Year[2]	Est Households Attending[1]
Visiting Zoos, Botanical Gardens, Science Museums	25.5 MILLION	$142	179,490
Latino Music or Dance Performances	23.8 MILLION	$183	130,275
Latino Festivals or Craft Fairs	21.7 MILLION	$163	133,170
Classical Arts Performances Symphonies, Modern or Ballet Dance, Opera and Plays or Live Theater	16.7 MILLION	$206	81,060
Non-Latin Music or Dance Performances	16.1 MILLION	$154	104,200
Visiting Art or History Museums	14.3 MILLION	$110	130,275

TOTAL ARTS AND CULTURE SPENDING

$118.1 MILLION

ON AVERAGE, LATINOS REPORT OVERALL PER CATEGORY EXPENDITURES OF BETWEEN

$110 & $206

SUMMARY

Latino consumers were asked how many dollars they spent attending each of six arts and culture categories ranging from classical arts performances to Latino festivals to zoos and botanical gardens. It should be remembered that from the consumer standpoint, the family costs of attending an arts and culture exhibition or event may include more than the cost of admission alone – parking, meals and beverages before or after the event or purchased at the event, items bought at venue stores, and so on. On average, Latinos report overall per category annual expenditures of between $110 and $206. Remembering that those who attend such events do so several times a year on average and do so with multiple members of the household, they appear remarkably frugal in controlling their entertainment budgets.

Knowing what families are spending on these types of events and having U.S. Census estimate of 289,500 Latino households in Greater Phoenix, it is projected that Latino consumers spend an estimated $118.1 million annually on arts and culture.

(1) CLARITAS, 2007 ESTIMATE; (2) BRC HISPANIC MARKET SURVEY – MEAN HOUSEHOLD ANNUAL EXPENDITURE

HOW MUCH DO

LATINOS CURRENTLY SPEND ON ARTS AND CULTURE?

CORE ATTENDERS

One of the most telling survey questions asked Latinos to describe financially how they attend cultural or entertainment events in the course of a year.

The majority (59% of Latino households) put themselves in the category of finding free or inexpensive things to do, a tendency that rises within the lowest income and acculturation groups but is not exclusive to them.

The unique value in this question is in helping to more clearly define the other 41 percent of Latino households which fall into two categories: 14 percent of Latino households commit resources to go to what they self define as "big" events, such as concerts, which they perceive as having high admission costs; 27 percent of Latino households save up for one or two "big" events during the year but in between go to smaller events. **Together, these two categories of Latinos are the CORE ATTENDERS, the key promotional targets for arts and culture organizations.**

INCOME NOT A DRIVER

Family income is not a strong correlate of either Latino consumer interest in arts and culture opportunities nor is it a predictor of participation. Other factors such as age, family size, nativity or language skills are more likely to define participation in specific kinds of events. This is because many Latinos (27%) "save up" for big ticket events they wish to attend. Consequently many middle income families are more participatory than might otherwise have been thought; they may be a pool for ticket sales development.

This "save up for events" behavior (coupled with the well known "credit adverse" or "cash mentality" tendency of Latinos, particularly those over 40) suggests that arts and culture organizations may better serve both themselves and the market by evaluating whether there are ways to help these "save up" Latinos to fulfill their interest through ticket acquisition methods that are more friendly to their way of thinking.

AFFORDABILITY PERCEPTION

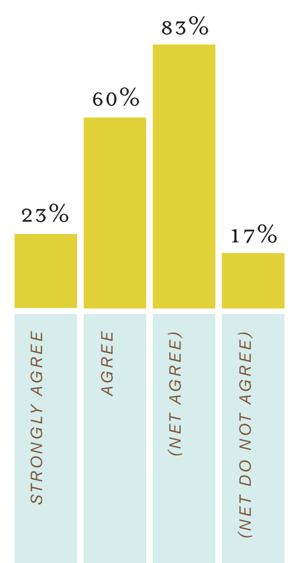
Such strategy could be strengthened by increasing awareness that these arts and culture opportunities are more affordable than most Latinos assume. As of the time of this survey, eight of ten assume that most arts and culture events of interest to them are out of reach price wise. *FIG. 1*

The focus groups echoed this Latino assumption that the prices of attending arts and culture organizations and events are out of reach even though many spend much more on ball games and other recreation. Thus, price may be a perceived rather than actual barrier. Indeed, many in the groups report that they are comfortable spending $35 to $55 per ticket for events that appeal to them.

FIG. 1

THERE ARE CULTURAL AND ENTERTAINMENT EVENTS WE WOULD LIKE TO GO TO BUT THEY ARE JUST TOO EXPENSIVE TO TAKE THE WHOLE FAMILY.

– SURVEY QUESTION



HOW DO

LATINOS REACT TO THE MARKETING BY ARTS AND CULTURE ORGANIZATIONS?

CONTENT

The focus groups were very clear that Latinos largely do not feel that arts and culture organizations market to them. This was the case whether the focus group members were Learners, Straddlers or Trendsetters.

As a result, there is an underlying attitude that arts and culture organizations do not value Latinos as customers. So, they turn their back on this perceived indifference. They believe that arts and culture organizations see Latinos as a monolithic "Mexican" market rather than as upwardly mobile, in touch, modern consumers who have lots of choices and who reflect the cultures of many Latin countries in addition to Mexico.

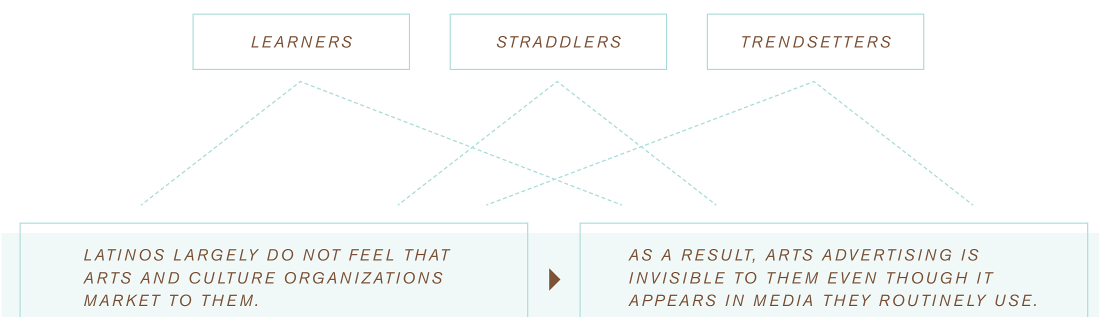
"YOU NEED TO SEE IMAGES OF US IN THE ADS THAT MAKE YOU FEEL COMFORTABLE."

– FOCUS GROUP PARTICIPANT

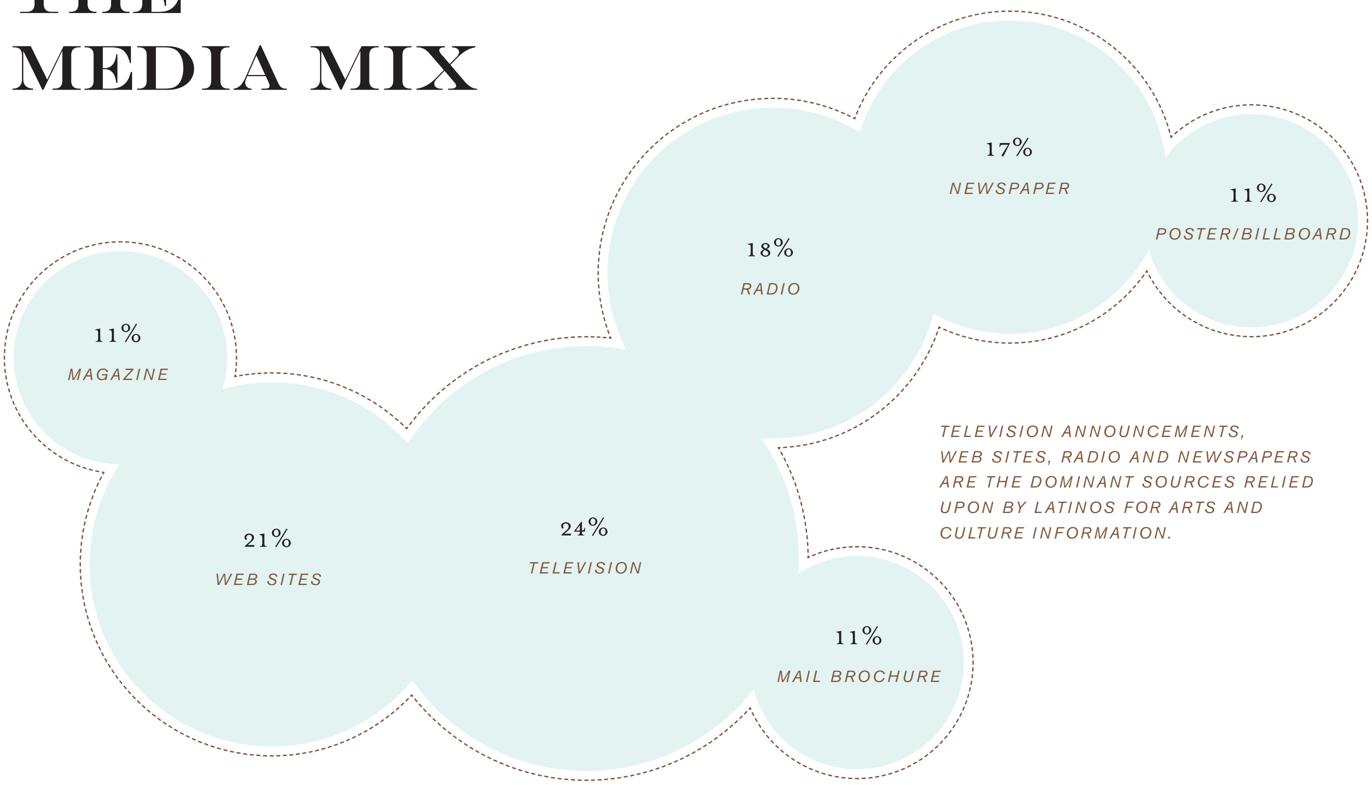
The major reason for this attitude is that Latinos do not "see" local arts marketing because arts advertising does not show them or their culture prominently. As a result, arts advertising is invisible to them even though it appears in media they routinely use. The words and images are not culturally relevant to their self-view.

Compounding this perception is the belief among many Latinos that current arts advertising is directed more to the experienced/traditional customer rather than to the newcomer customer like them. This belief is aggravated by the fact that the "free" times at many institutions are during the week and so are unavailable to working parents.

Overall, all the focus groups were positive about the arts and culture advertising and brochures offered for discussion. The groups were especially enthusiastic about the website, ShowUp.com. However, nearly all participants were unaware of the advertising either because it did not reach them, or they did not see the advertising as interested in Latinos as consumers.



THE MEDIA MIX



TELEVISION ANNOUNCEMENTS, WEB SITES, RADIO AND NEWSPAPERS ARE THE DOMINANT SOURCES RELIED UPON BY LATINOS FOR ARTS AND CULTURE INFORMATION.

MEDIA

The survey reported that web sites compete for first place among the more frequent event attenders. Over half (54%) of Latino consumer households have access to the Internet and use it an average of 2-3 hours per day. The focus groups confirmed the growing importance of the web as a Latino marketing tool. About 60 percent of the group participants were regular Internet users for information about activities and many others have family members who serve that role. Group members who are the most active arts and culture Internet users rely on Google or azcentral.com for event searches. However, despite their Internet familiarity, there was no mention of the web sites of the individual arts and culture organizations.

Three of ten report receiving mail announcements for arts and culture events. Latino consumers, both in these studies and in others, are more open to and likely to read general promotions received via flyers and through mail… a finding especially important for arts and culture organizations interested in developing strong consumer traffic and loyalty from geographic areas in the region of their venue.

Although Spanish language television is used by seven of ten Latinos, only 38 percent describe themselves as “regular viewers” of Spanish TV. Regular viewership of Spanish language TV correlates with attendance at ranchero, norteño or mariachi concerts.

Radio music preferences are very diverse, especially when viewed with regard to consumer language skills. Twelve music categories ranging from gospel to country and western to Latin salsa/merengue are enjoyed by 10 percent or more of Latinos. Mariachi/Frontera/Norteño music has a wide audience but listenership evaporates among English dominant Latinos.

As would be expected, people seek event information in their native language.

Bilinguals are comfortable in either Spanish or English.

People who buy tickets to “big” (more expensive) events, however, definitely lean towards English.

RECOMMENDATIONS:
WHAT CAN ARTS AND CULTURE ORGANIZATIONS IN GREATER PHOENIX DO

TO ATTRACT MORE LATINO VISITORS?

The findings of the Baseline Latino Market Survey provide the basis for estimating the current annual spending by Latinos on arts and culture at $118 million in 2007/2008. Based on the follow-up focus groups, it is estimated that their spending could grow significantly if marketing were made more relevant for Latinos.

While there may have been a theory prior to the research that arts and culture organizations need to develop more Latino oriented product in order to better attract Latinos, the research indicated that the challenge lies mainly in the outreach efforts (advertising and promotion) and at the operational level (pricing, availability and welcoming atmosphere).

"VERY OFTEN YOU DON'T HEAR ABOUT THINGS YOU WOULD HAVE ENJOYED."

– FOCUS GROUP PARTICIPANT

It does not appear that a major Spanish language marketing investment is needed to run in parallel with the basic marketing investment. Rather, current marketing should be adjusted to appeal to and reach the bilingual Latino market which is the audience expansion opportunity.

THE FOLLOWING STRATEGIES ARE SUGGESTED BASED ON THE RESEARCH.

1

Make advertising more visible and informative for Latinos.

In addition to normal exhibition/event information, reformat advertising so that:

(a) Latinos are able to recognize themselves in the advertising of arts and culture organizations. Advertising should show both Latinos and non-Latinos enjoying the attraction in a casual, relaxed manner. Many assume that arts and culture events are formal affairs and are encouraged when made aware that casual attire is common and acceptable.

(b) Latinos are depicted as upwardly mobile, sophisticated visitors.

(c) The value in terms of fun, making family memories and cultural satisfaction is communicated. The concept of "Making Memories" appears to be uniquely powerful among Latino arts consumers who wish to expose their children to arts and culture and the phrase may have significant marketing value.

(d) Latinos receive clear information: when, where, how much, how to order, parking, etc.

2

Develop marketing strategies to counteract the fear of the unfamiliar.

The research shows that Latinos seek ways to learn more about events and attractions before investing in them. Use the Internet, advertising, PR and promotional tools to provide this critical assurance.

POTENTIAL LATINO ARTS AND CULTURE ATTENDANCE

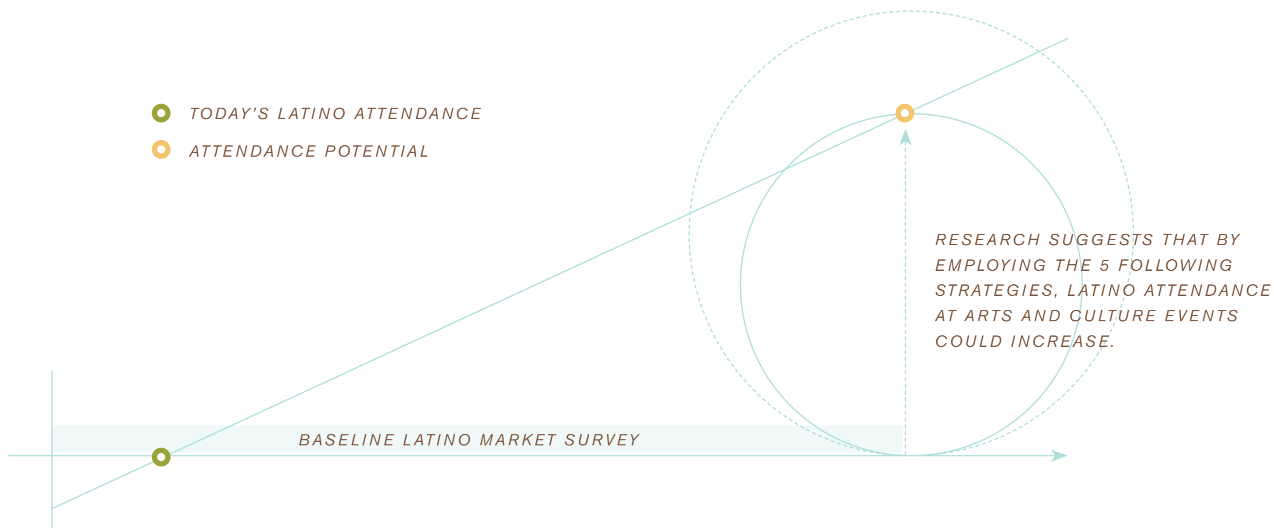


FIG. 1

3

Employ media and promotional targeting strategies to reach Latinos in their homes and where they shop with mediums that they routinely use.

Neighborhood flyers, event marketing and cross sales tactics are well received by Latinos but are under-utilized by arts and culture organizations. The research indicates that most existing promotional ideas will work as well with Latino as with non-Latino arts and culture consumers, but Latinos have to be made aware of them.

4

Use advertising, PR and promotion to combat the unwarranted Latino perception that the admission costs of arts and culture organizations are out of reach.

5

To increase Latino family attendance, make free or reduced cost family activities available on weekends.

Advertising and promoting these activities will draw larger audiences, especially Latinos. The research shows that the weekend is the only practical time for Latino families to visit arts and culture attractions and events. For example, a monthly free Saturday, metropolitan wide, promoted by all arts and culture organizations would have a great impact on the Latino community.

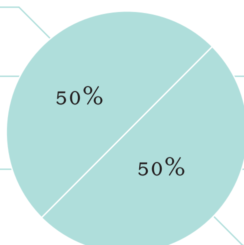
BASELINE LATINO MARKET SURVEY *FALL 2007*

METHODOLOGY

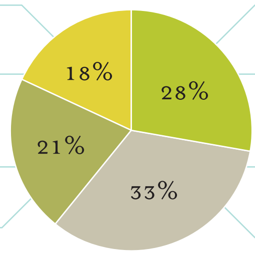
SAMPLE UNIVERSE:	QUALIFIED RESPONDENTS:	SAMPLE SIZE:	DATA COLLECTION METHODOLOGY:	MARGIN OF ERROR AT 95% CONFIDENCE LEVEL:
Maricopa County	Self-defined Hispanics 18 or over	1,200 interviews	Telephone interviewers	+/-2.9%

RESPONDENT DEMOGRAPHICS

GENDER



EDUCATIONAL ATTAINMENT



CHILDREN IN HOUSEHOLD

NONE	4 YRS OR YOUNGER	5-13 YEARS	14-17 YEARS
28%	32%	49%	29%

		SURVEY	SPANISH DOMINANT	BILINGUAL	ENGLISH DOMINANT	U.S. BORN	FOREIGN BORN
RESPONDENT AGE	Under 25	11%	8%	15%	8%	11%	11%
	25 to 34	29	39	22	28	27	32
	35 to 49	36	41	30	37	29	43
	50 to 64	17	9	21	21	23	10
	65 or over	7	3	12	6	10	4
		100%	100%	100%	100%	100%	100%
	MEDIAN	39.2	36.0	41.5	40.6	41.3	37.3
FAMILY INCOME	$24K or less	27%	37%	26%	18%	23%	33%
	$24.1K to $36K	23	31	20	19	20	28
	$36.1K to $48K	19	18	19	22	21	17
	$48.1K or more	31	14	35	41	36	22
		100%	100%	100%	100%	100%	100%
	MEDIAN (in thousands)	$36.1	$29.1	$38.8	$43.3	$40.1	$31.3

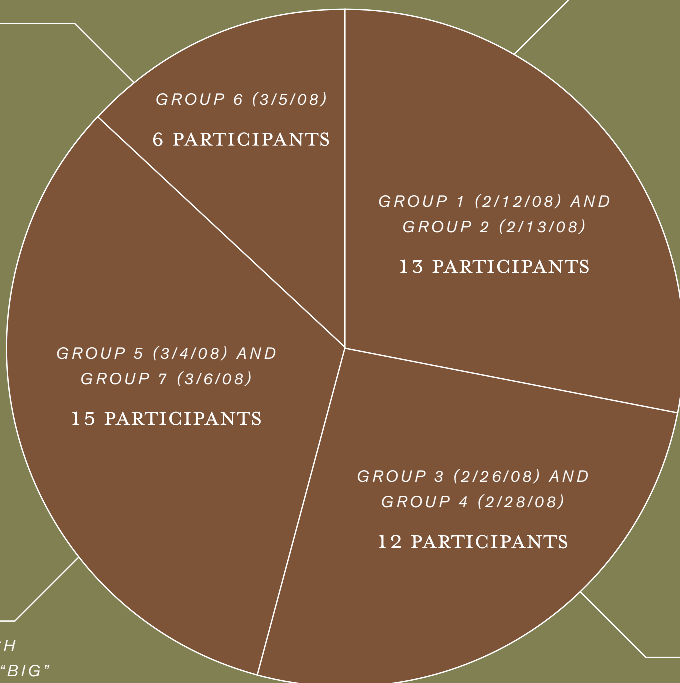
FOCUS GROUPS *SPRING 2008*

COMPOSITION OF THE FOCUS GROUPS

THE FOCUS GROUPS WERE ORGANIZED ON THE BASIS OF HOW THE LATINO PARTICIPANTS ATTEND ARTS AND CULTURE EVENTS IN THE COURSE OF A YEAR:

INCLUDED SPANISH DOMINANT LATINOS. THERE WAS NO QUALIFICATION ABOUT THE TYPE OF ATTENDANCE.

INCLUDED BILINGUAL OR ENGLISH DOMINANT LATINOS WHO ATTEND FREE AND INEXPENSIVE EVENTS.



INCLUDED BILINGUAL OR ENGLISH DOMINANT LATINOS WHO GO TO "BIG" (SELF DEFINED AS MORE EXPENSIVE) EVENTS THROUGHOUT THE YEAR.

INCLUDED BILINGUAL OR ENGLISH DOMINANT LATINOS WHO SAVE FOR SEVERAL "BIG" (SELF DEFINED AS MORE EXPENSIVE) EVENTS BUT ALSO ATTEND SMALLER EVENTS.

STRUCTURE OF THE FOCUS GROUPS

GROUPS 1-6

THE FIRST SIX FOCUS GROUPS HAD A THREE PART STRUCTURE:

GROUP 7

THE SEVENTH GROUP WAS AN UNSTRUCTURED SUMMARY DISCUSSION WHICH EXPLORED AND AUGMENTED THE FINDINGS OF THE PRECEDING SIX GROUPS.

FIRST, DISCUSSIONS ABOUT CURRENT ATTENDANCE PATTERNS, INFORMATION ACCESSED ABOUT ARTS AND CULTURAL EVENTS AND THE DECISION PROCESS.

SECOND, DISCUSSIONS ABOUT FOUR KEY BARRIERS TO ATTENDANCE WHICH EMERGED FROM THE 2007 BASELINE HISPANIC MARKET SURVEY. THESE DISCUSSIONS FEATURED PROMOTIONAL IDEAS FOR HELPING TO OVERCOME EACH OF THE BARRIERS. SOME OF THE IDEAS ARE ALREADY IN PLACE BY MUSEUM AND PERFORMANCE VENUES OR COULD BE MADE PART OF THEIR OPERATIONS.

THIRD, DISCUSSIONS ABOUT CURRENT ARTS AND CULTURE ADVERTISING, SEASONAL BROCHURES AND USE OF THE INTERNET.

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