

Cultural Engagement by Race

June 2020



BACKGROUND

The purpose of this report is to identify similarities and differences in cultural engagement by different races. Data is collected from our 2018 National Positioning Study in which 16,970 cultural attraction attendees were surveyed among 25 metropolitan markets and 2018 US Census.

The survey was not designed to identify ways to increase cultural engagement, it was designed to understand how cultural attractions are positioned in their marketplace. However, we collected data by race and have analyzed this data to identify any differences in engagement by race.

Between 600 and 1,000 surveys were conducted in the following Metropolitan Statistical Areas:

*Atlanta
Boston
Chicago
Cleveland
Dallas
Denver
Detroit
Houston
Kansas City
Los Angeles
Miami
Milwaukee
Minneapolis
New Orleans
New York City
Philadelphia
Phoenix
Pittsburgh
Portland
San Diego
San Francisco
Seattle
St. Louis
Tampa Bay
Washington, DC*

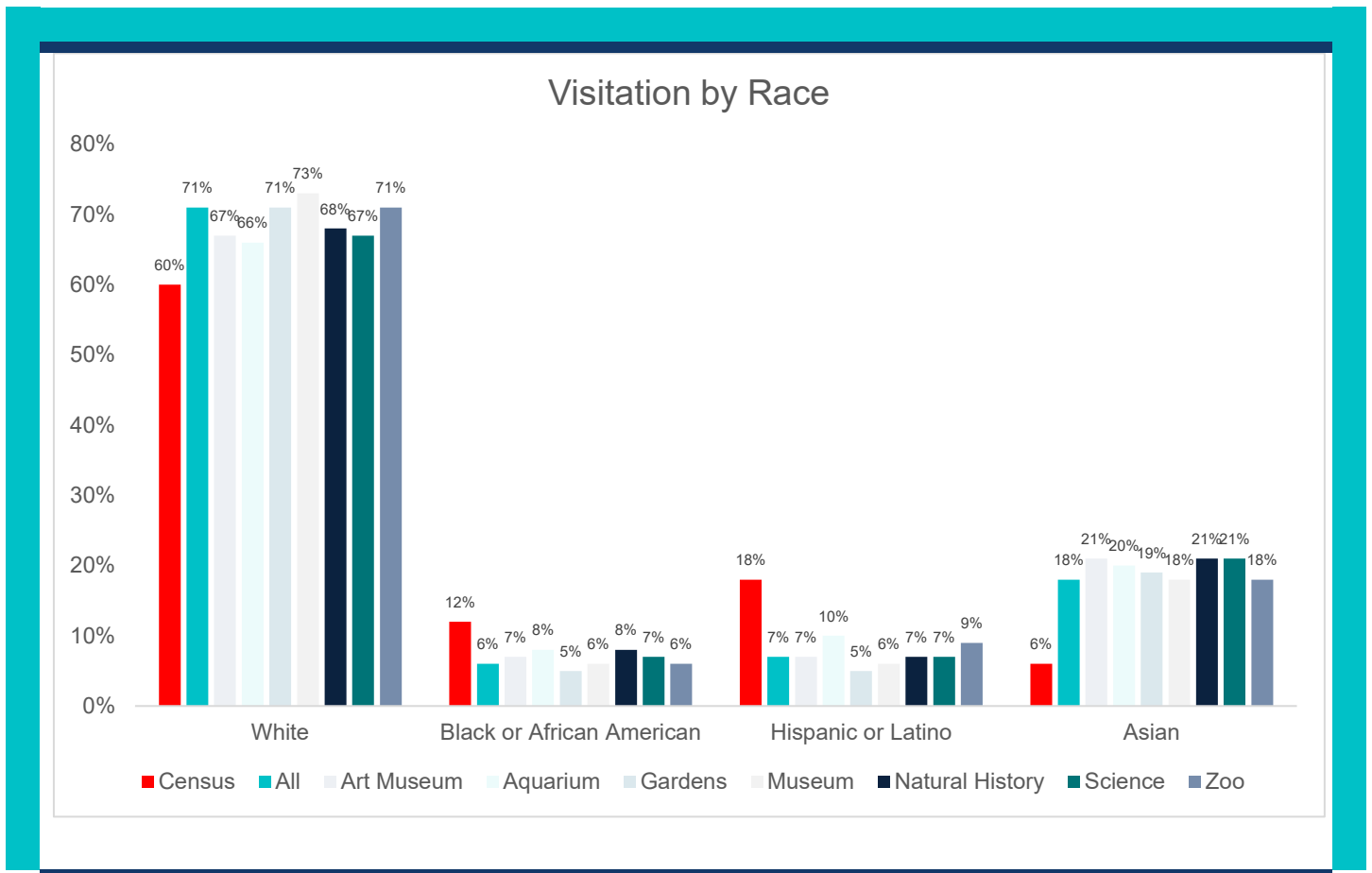


KEY RESULTS, CONCLUSIONS AND RECOMMENDATIONS

- *Black or African American and Hispanic or Latino visitation is under-represented compared to census by 50% and 250% respectively. Given these results, our analysis focuses on these two racial segments.*
- *The lower visitation is likely due to the following:*
 - *Lower educational attainment (lower percentage of college graduates)*
 - *The primary barriers to visitation are a lack of priority (rather do something else, even among those interested in the topic) and price*
- *Price is the primary factor considered prior to visiting among Blacks or African Americans and Hispanics or Latinos (70% very important).*
 - *Anticipated pricing is similar to expectations except for Aquariums. Given that admission prices are similar to expectations, the negative impact of pricing on visitation is relatively low. Aquariums are impacted most negatively, and the average Aquarium admission well exceeds expectations.*
 - *Price impacts Black or African American visitation between 6% and 10% and Hispanic or Latino visitation between 7% and 14%. This suggests that while price impacts visitation, it is relatively low (at least among those who visit cultural attractions).*
- *The primary reasons for visiting are an interest in the subject and entertainment. Both Black or African American and Hispanic or Latino visitors are more likely to visit for education and special exhibitions. These visitors are also more likely to visit with family, which could suggest exposing children to these experiences is important.*
- *Non-White visitors are significantly older than other visitors. This could be problematic if cultural attractions do not expand their appeal or accessibility to Black or African American or Hispanic or Latino populations attendance could decrease.*

VISITATION

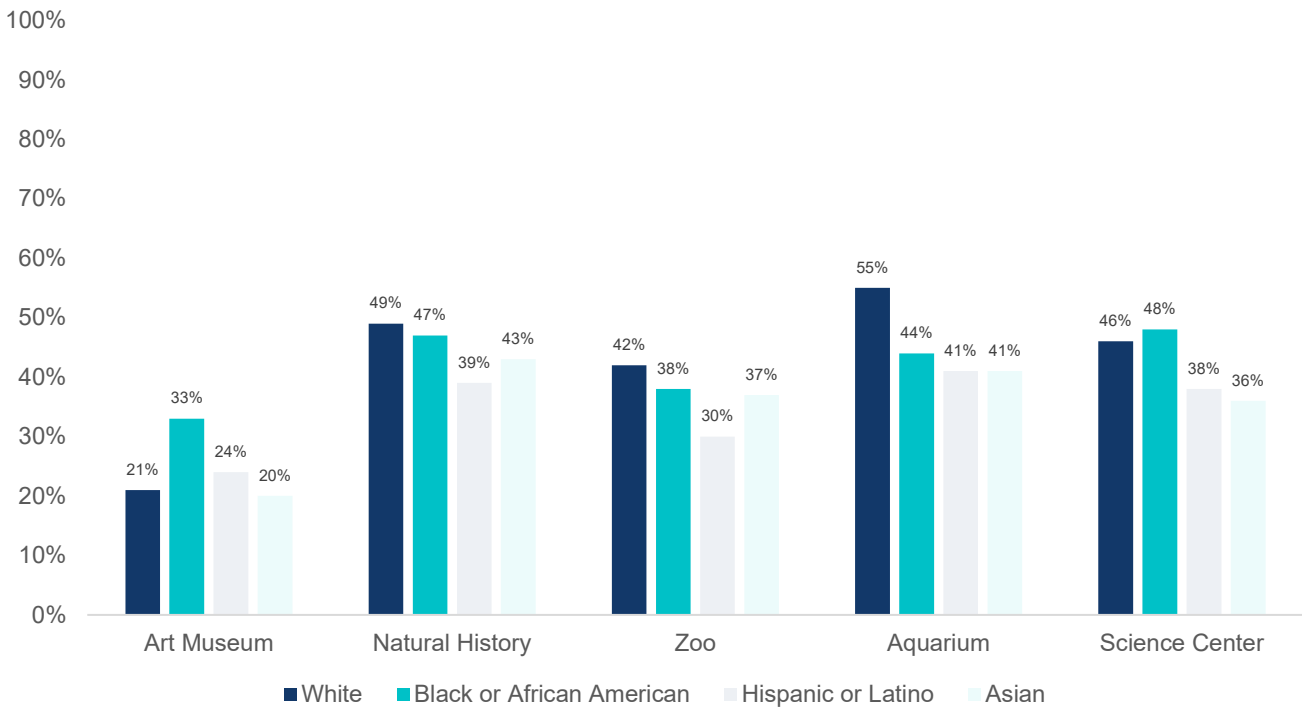
Visitation among Whites is 18% higher than Census, among Asians it is 300% higher than Census. Visitation among Blacks or African Americans is under-represented by 50% and 250% among Hispanic or Latinos.



BARRIERS

Barriers to visiting range from admission price to transportation issues. In most cases, barriers to visitation among minority populations are similar to White populations except art museums (Blacks and African Americans have more barriers) and aquariums (Whites have more barriers).

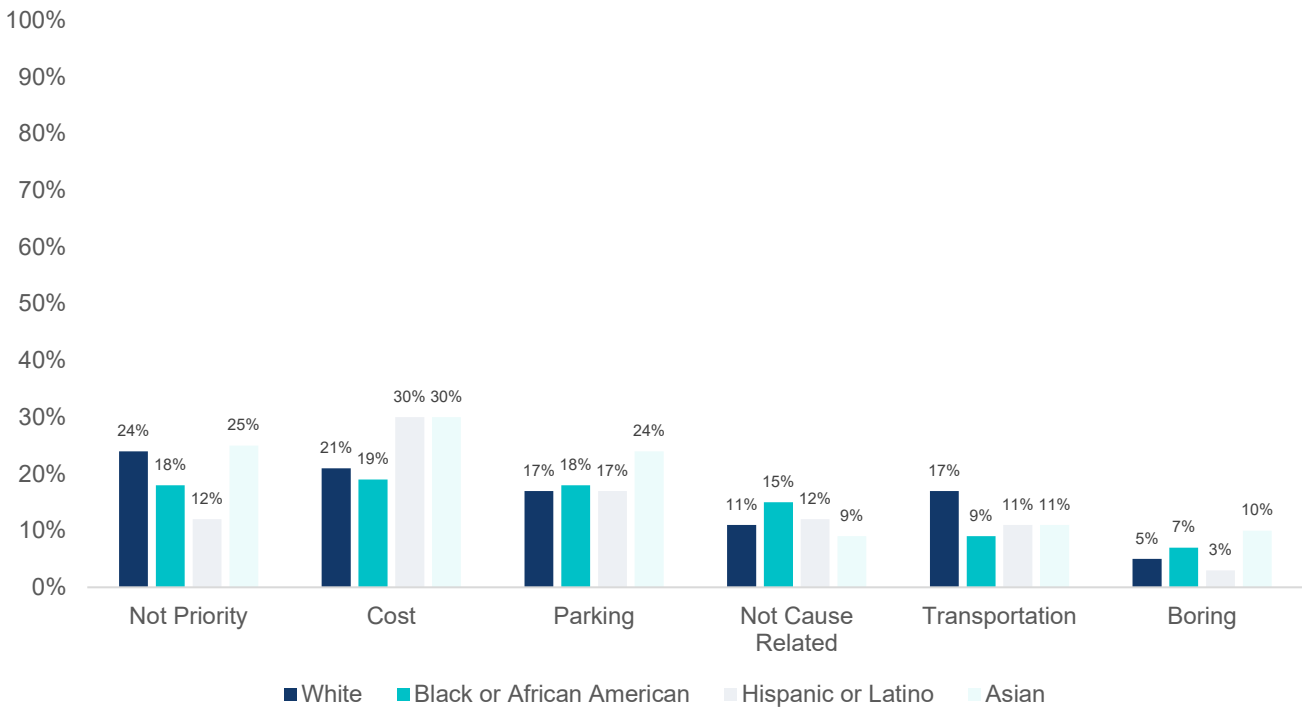
Percentage Interested in Subject But Not Visiting by Race



Art Museum Barriers

The primary barriers to Art Museum visitation are a lack of priority (rather do something else), cost and parking.

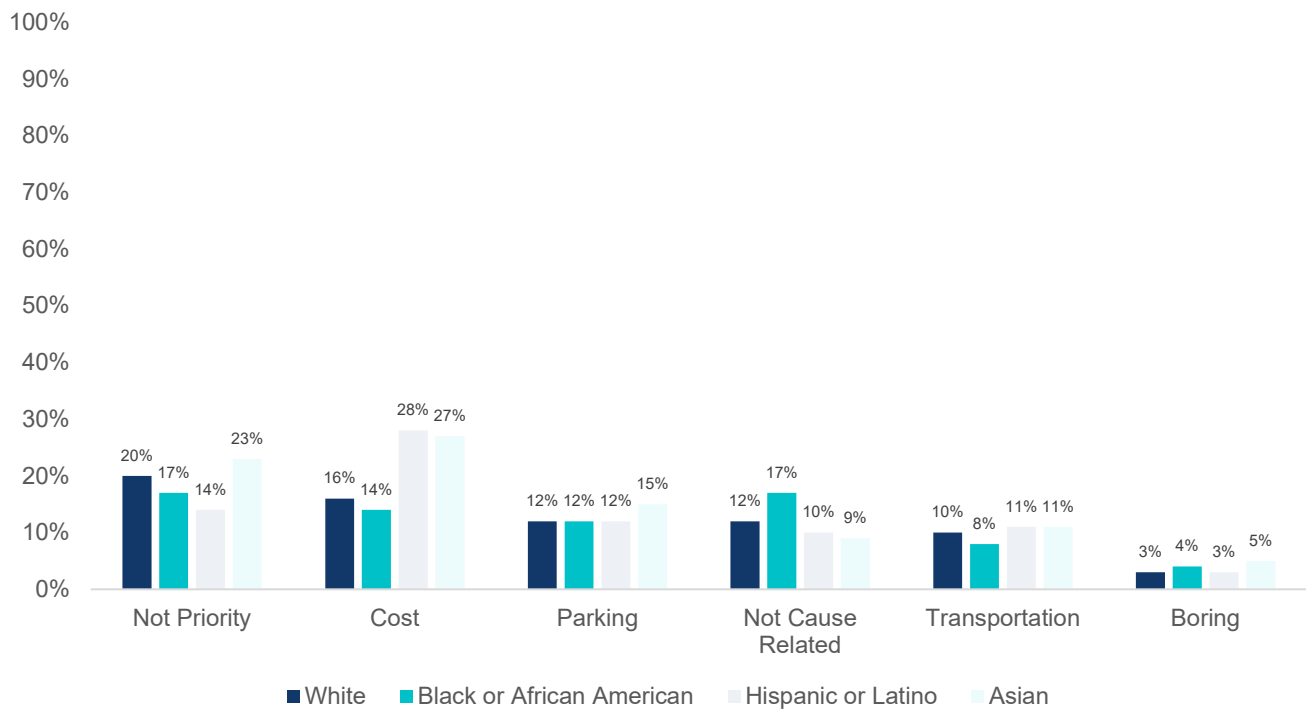
Art Museum Barriers to Visitation



Natural History Museum Barriers

The primary barriers to Natural History Museum visitation are a lack of priority (rather do something else) and cost.

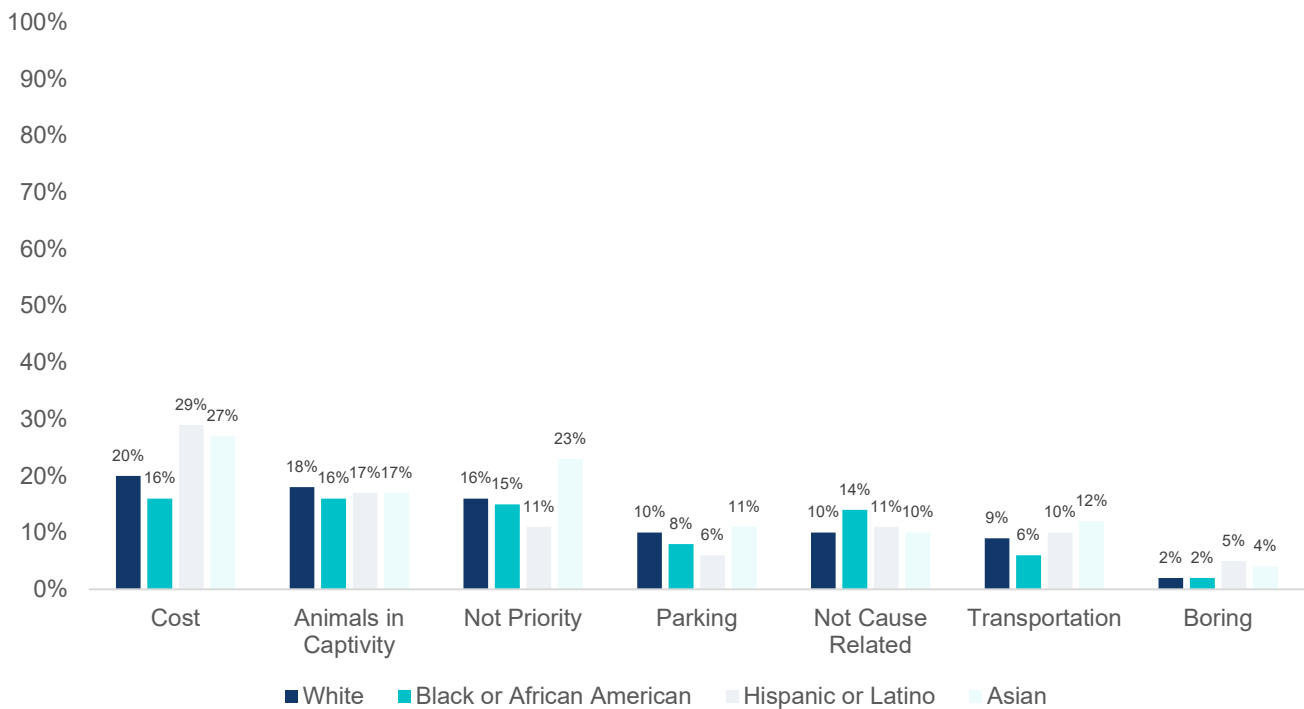
Natural History Museum Barriers to Visitation



Zoo Barriers

The primary barriers to Zoo visitation are cost, animals in captivity, and a lack of priority.

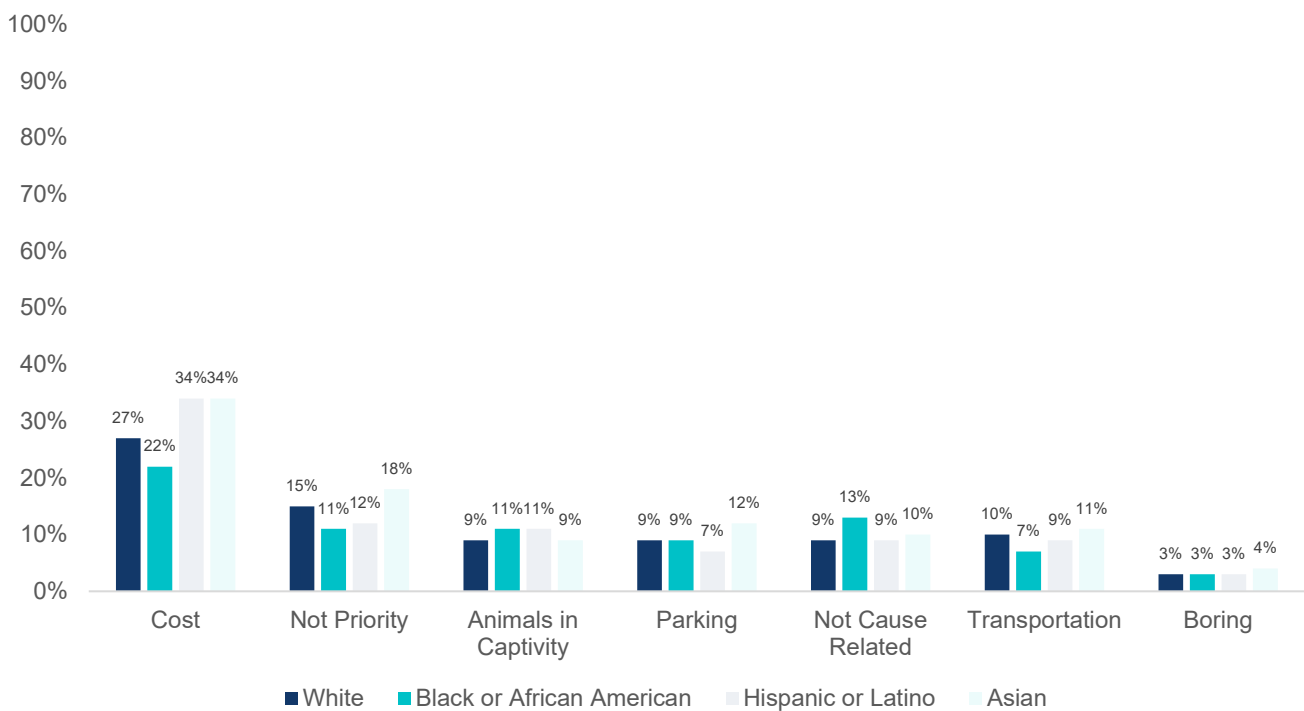
Zoo Barriers to Visitation



Aquarium Barriers

The primary barrier to Aquarium visitation is cost.

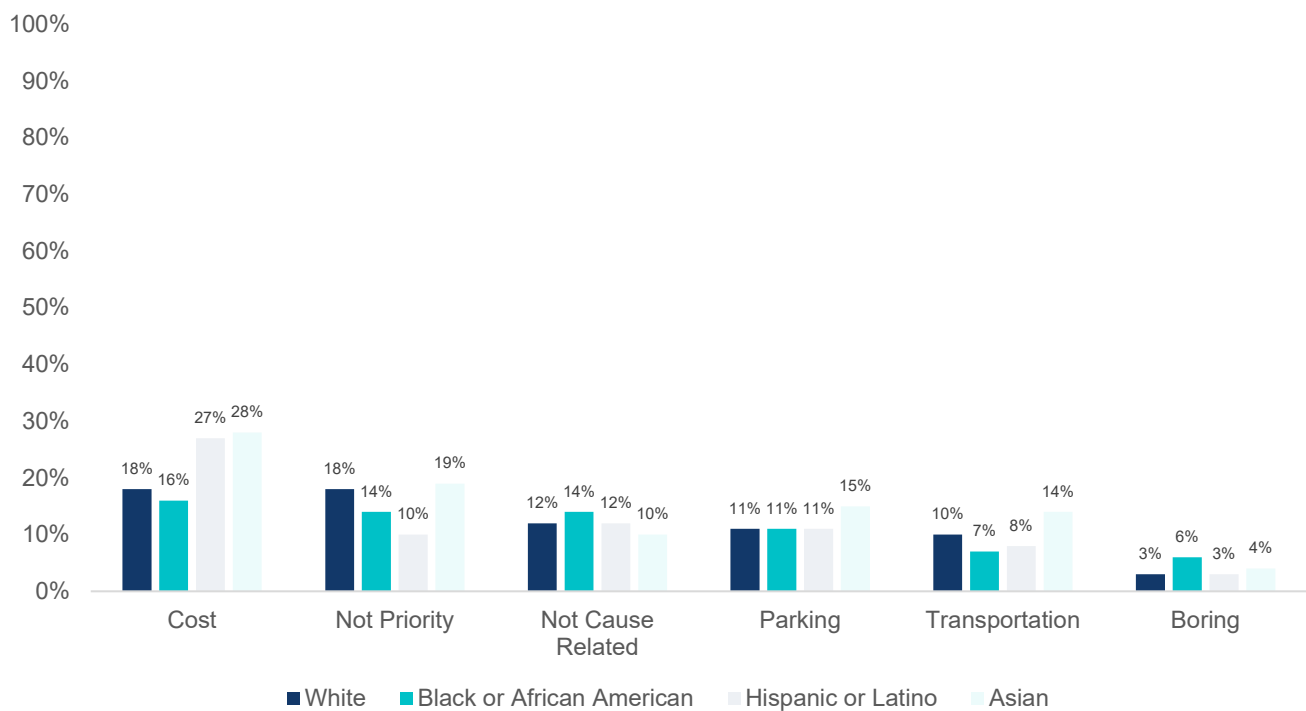
Aquarium Barriers to Visitation



Science Center Barriers

The primary barriers to Science Center visitation are cost and a lack of priority (rather do something else).

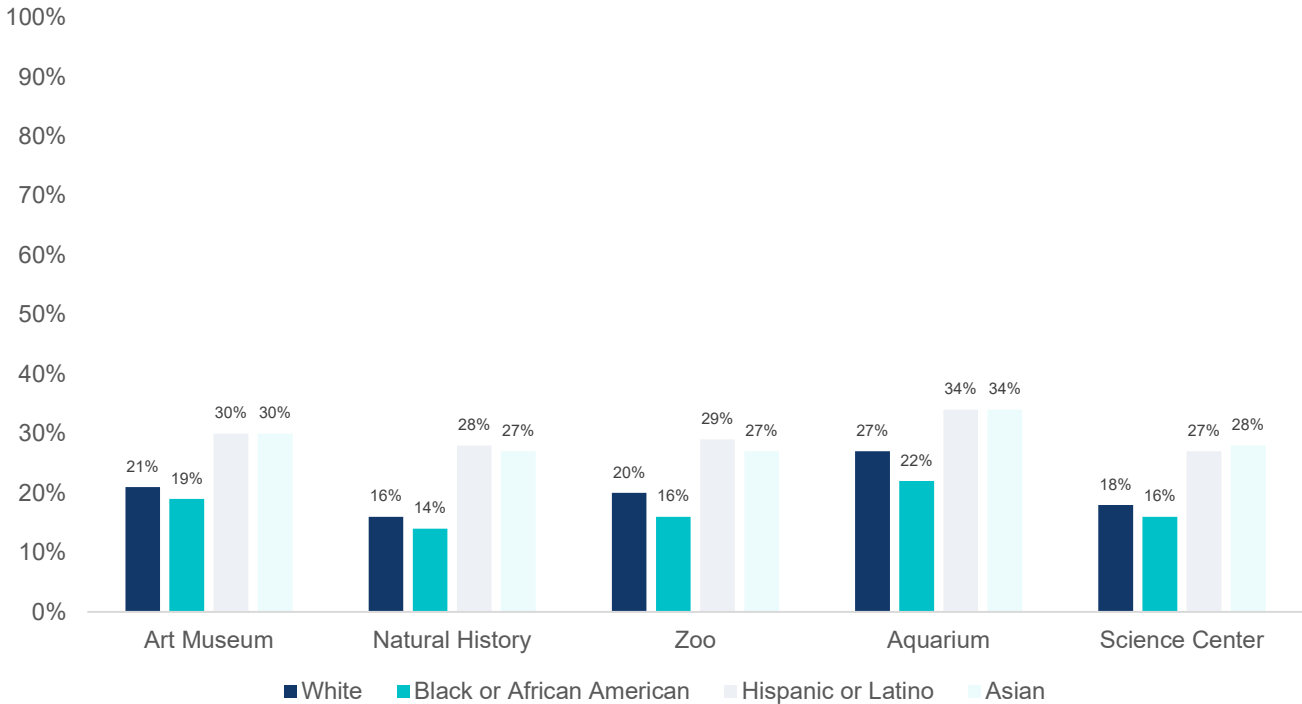
Science Center Barriers to Visitation



PRICE BARRIER

Many have considered price to be a barrier to visitation. Price is less a barrier to visitation for White and Black or African American attendees compared to Hispanic and Latino or Asian visitors even though there are significant difference in median household income (see INCOME).

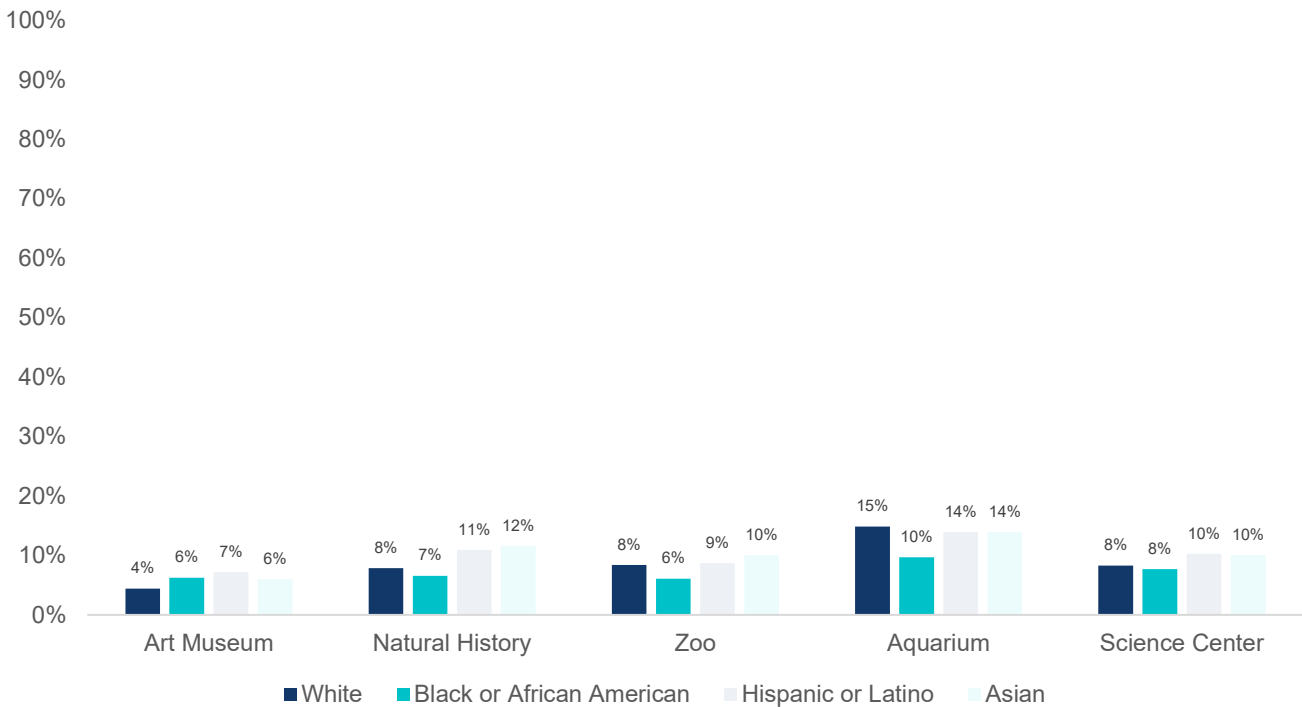
Price As A Barrier to Visitation



PRICE BARRIER

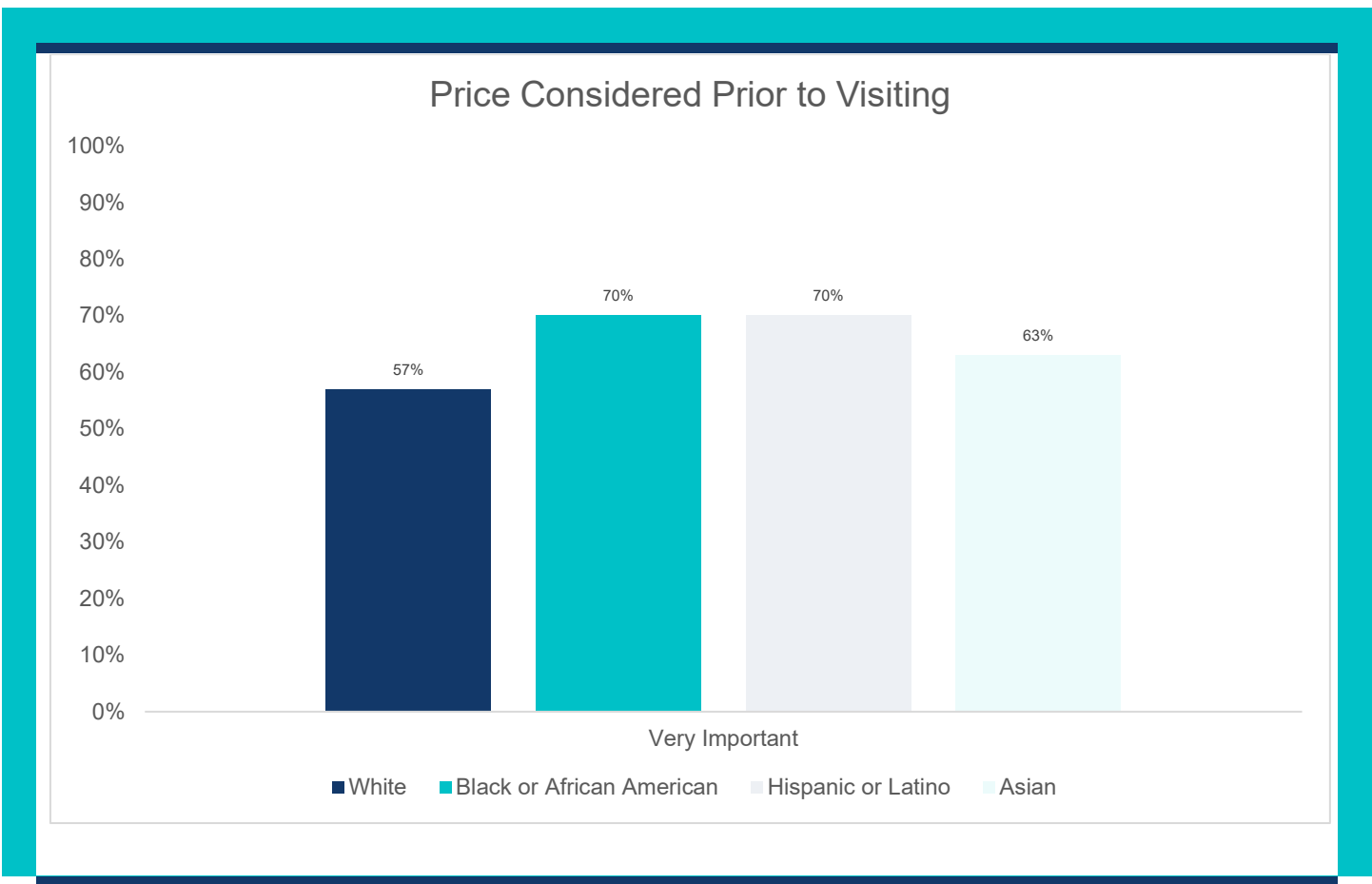
The graph below indicates the impact of price on visitation as a whole by including those affected by price with those that actually visit. There remains consistency in that Hispanic and Latino and Asian visitors are slightly more impacted by price than White and Black or African American visitors.

Price As A Barrier to Visitation as a Percentage of All Audiences



PRICE CONSIDERED PRIOR TO VISITING

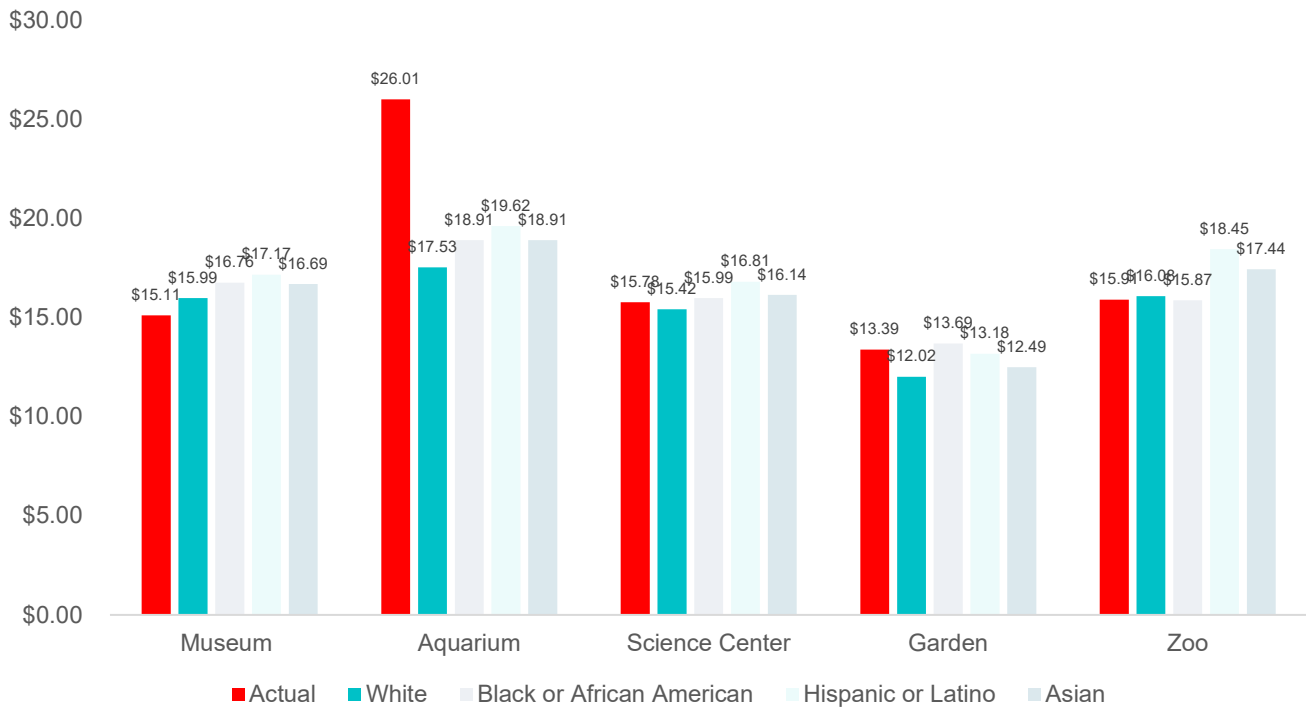
Even though Black or African American visitors are less impacted by price, they consider price before visiting as much as Hispanic or Latino visitors. Asian visitors are less likely to consider price even though they are more sensitive to price.



ANTICIPATED ADMISSION PRICE

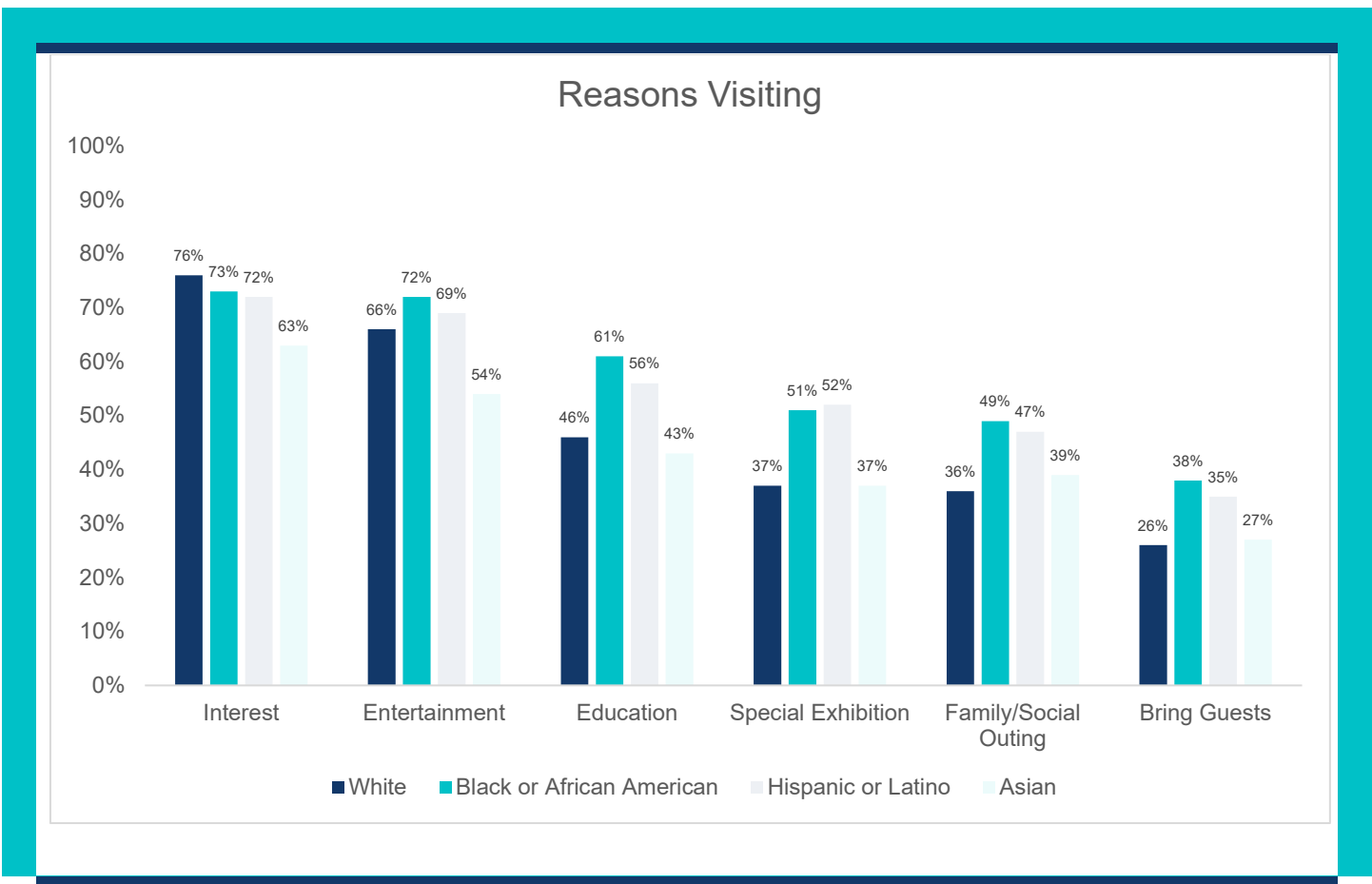
Aquariums cost significantly more than visitors anticipate. Hispanic or Latino and Asian visitors anticipate admission costs are higher than they actually are (except Aquariums) and higher than their White and Black or African American counterparts. Other cultural attractions are priced similarly to expectations.

Average Anticipated Price Compared to Actual



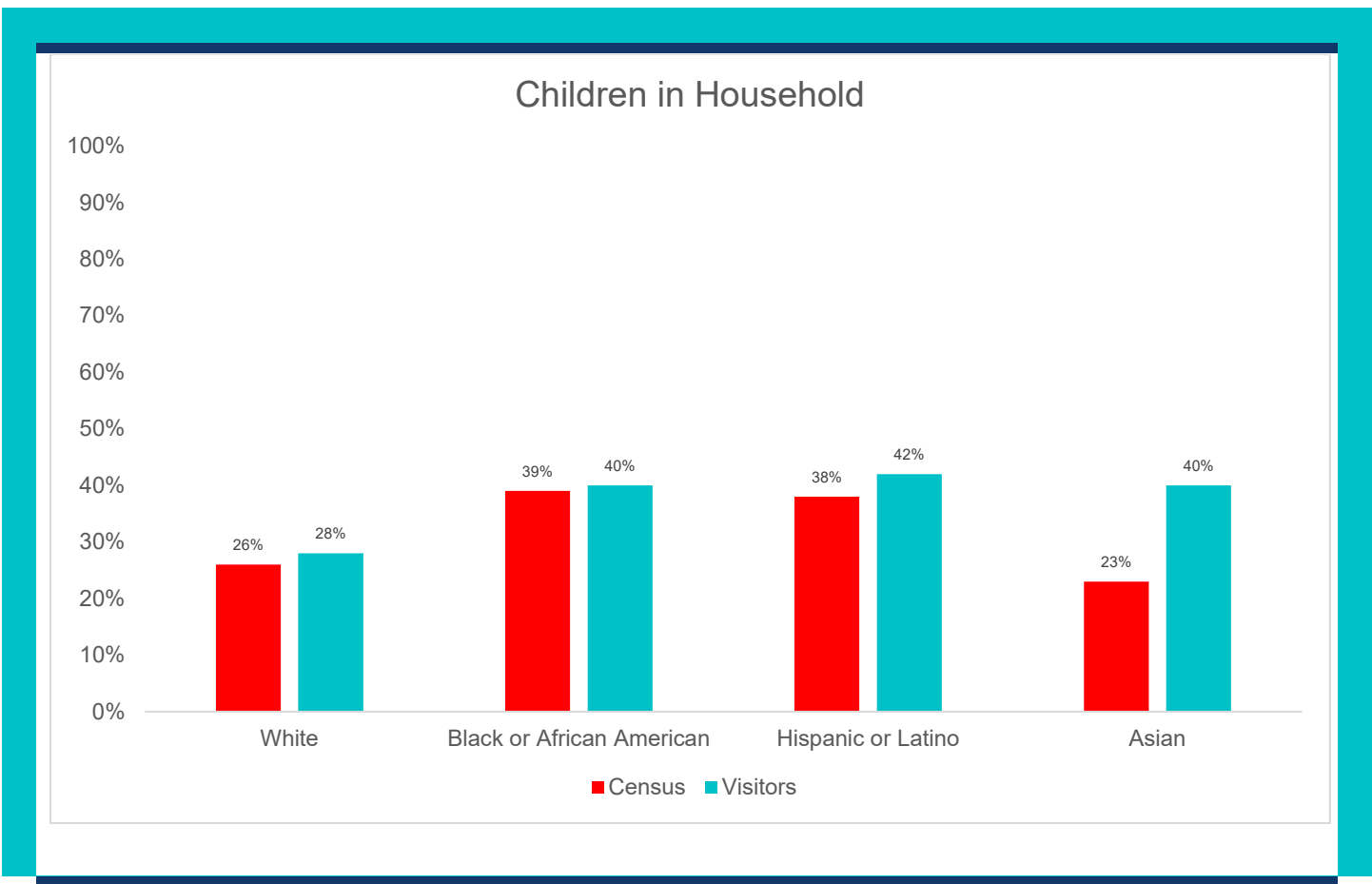
REASONS VISITING

The primary reason for visiting among all races is an interest in the subject. Black or African American and Hispanic or Latino visitors are much more likely to visit to learn, see special exhibitions, and to bring family and guests than White and Asian visitors.



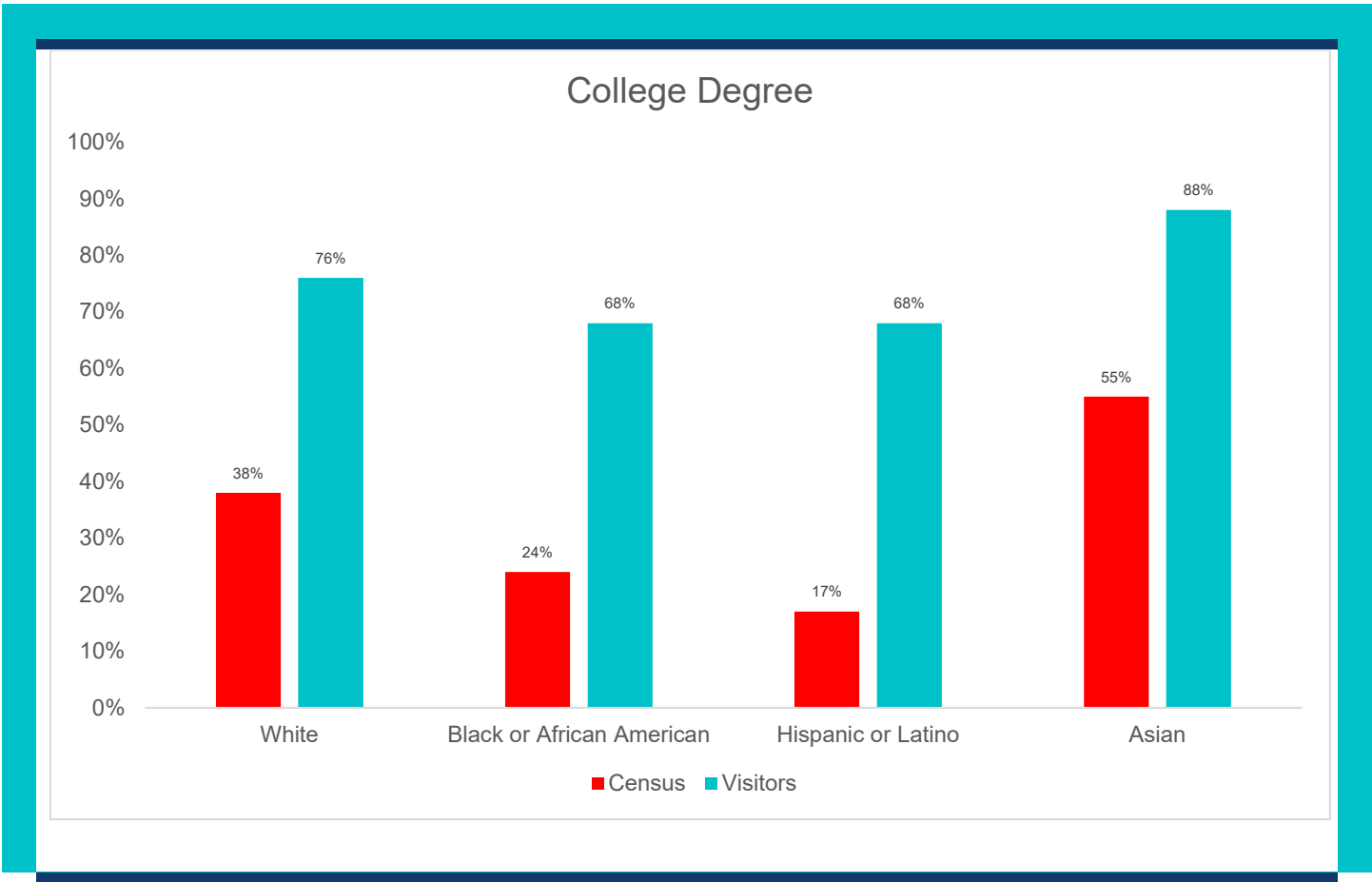
Demographics

Asian visitors are more likely to have children in their household.



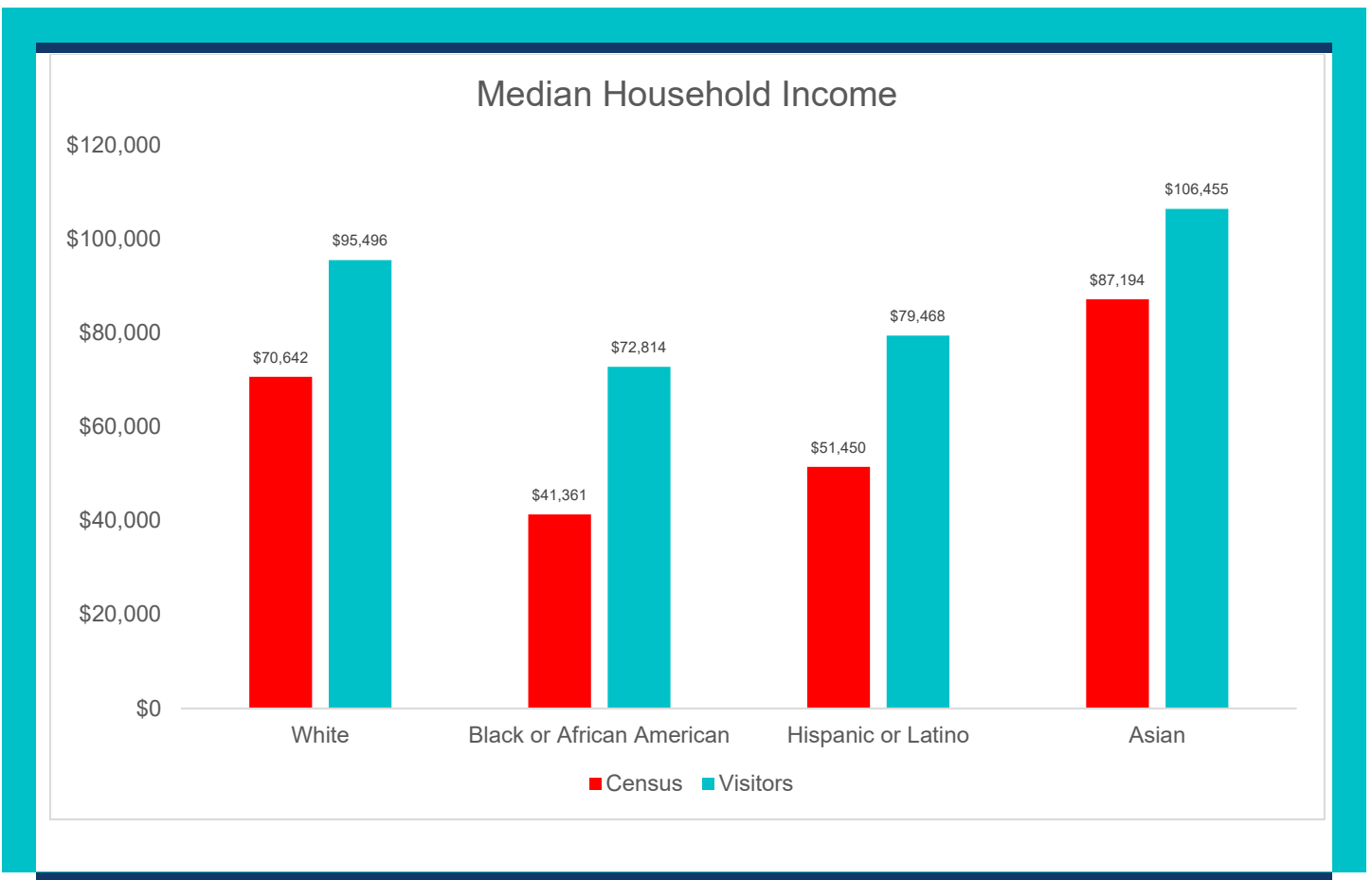
Demographics

All visitors are more likely to have a college a degree. Educational attainment is the “marker” or predictor for visitation by a factor of 2.0 for Whites and is more pronounced for Blacks or African Americans (2.8) and Hispanics or Latinos (4.0).



Demographics

Despite relatively equal educational attainment, there are significant differences in annual median household income.



Demographics

White visitors are much older than other audiences. This result is also reflected in the percentage of households with children.

