

Influentials® and Culture

Executive Summary

This study about Influential Americans in the general public and their views about culture was conducted with the RoperASW online panel. The first part of the study was done with a nationally representative sample recruited from the panel who had been pre-identified¹ as Influential Americans. Interviews were completed between February 12, 2004 and February 19, 2004.

The second part of the study also used the RoperASW online panel. Invitations were sent out to a nationally representative sample. Interviews were completed between April 1, 2004 and April 4, 2004. Both groups used the same questionnaire developed by RoperASW, the Association of Alternative Newsweeklies, the Alternative Weekly Network and the Ruxton Group.

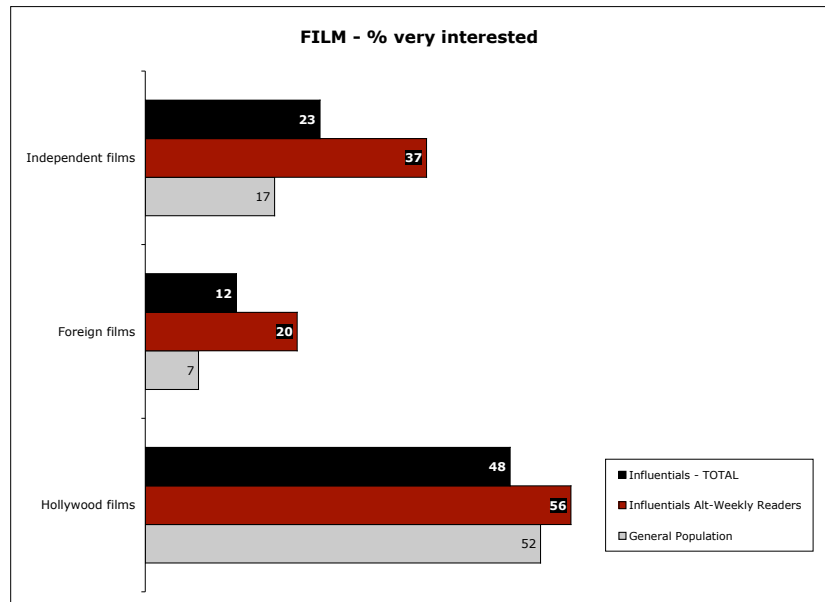
The key findings include:

- Alternative newsweeklies reach four out of ten Influentials in the United States. Given the limited distribution of AAN newspapers in small, medium and suburban markets, this is a staggering number.
- When it comes to making “cultural-buying decisions,” Influentials who read alternative newsweeklies are more dependent on editorial (both reviews and feature articles) and advertising than both the general public and Influentials as a whole.
- Culture, in almost every sub-category defined in the survey, is more important to Influentials who read alternative newsweeklies than to the general public or Influentials as a whole.
- Alternative Newsweekly Influentials consume and recommend cultural activities at a much greater rate than the general public or Influentials as a whole.

¹ Influentials® are screened from the General Public on the basis of their involvement in local affairs. To qualify as an Influential, a person had to have done three or more items from a list of things about government and politics.

Readership of newsweeklies

More than one-third of Influentials (37%) in states where newsweeklies are available, read alternative newsweeklies. That number increases to 61% when based on those Influentials aware of newsweeklies. This group of Influential alternative newsweekly readers tends to be more interested and involved in culture than



Influential who do not read alternative newsweeklies and the population in general.

Influentials interested in culture

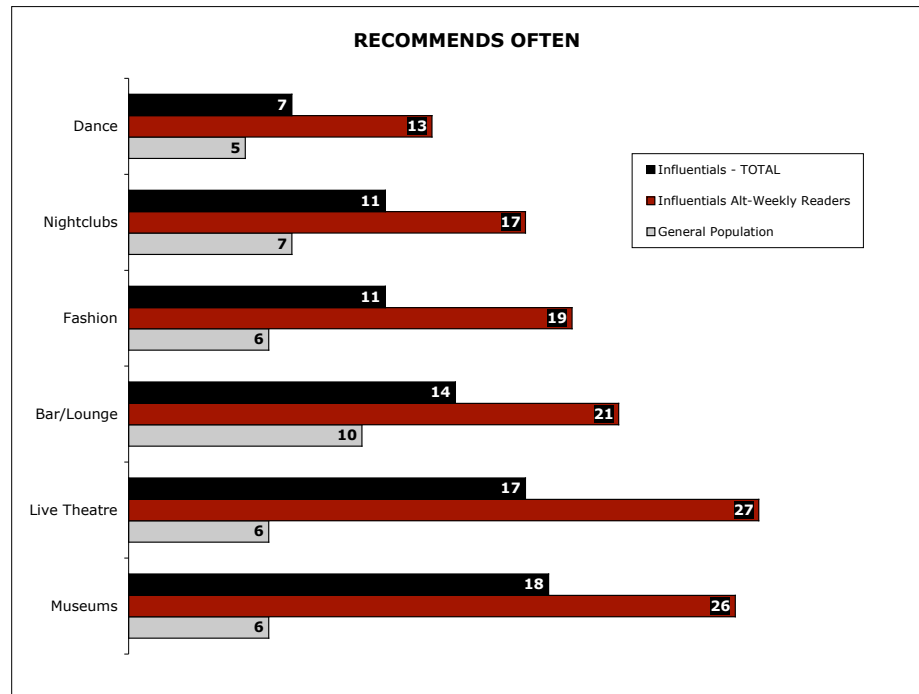
Influentials are more likely than the general public to be very interested in classic cultural activities, such as the theater, museums and the ballet. But Influentials' interests are not just in the classics. One in five (23%) Influentials compared to 17% of the general public are very interested in independent films and 12% are very interested in experimental theater, compared to just 4% of the general public.

While both the Influentials and the general public are interested in travel, Influentials are more likely to be very interested in traveling abroad (39%) than is the general public (27%). When it comes to television, Influentials are very interested in news programs, while the general public shows more interest in comedies and reality programs.

Influentials' interests in international culture extends to their choice of cuisines. More Influentials are very interested in all the food types listed than is the general public (except for American cuisine). Influentials also show a greater penchant for ethnic or spicy foods.

Influentials share their recommendations in a wide variety of cultural categories

The power of Influentials as market multipliers is evident in the cultural arena, as shown by the number of categories in which they are asked to recommend or have recommended something to other people. In ten of 14 categories asked about, at least half



of the Influentials or more say they provide recommendations frequently or sometimes. In almost every area asked about, Influentials are significantly more likely than the general public to have provided recommendations frequently or sometimes. This is especially true of Influential alternative newsweekly readers.

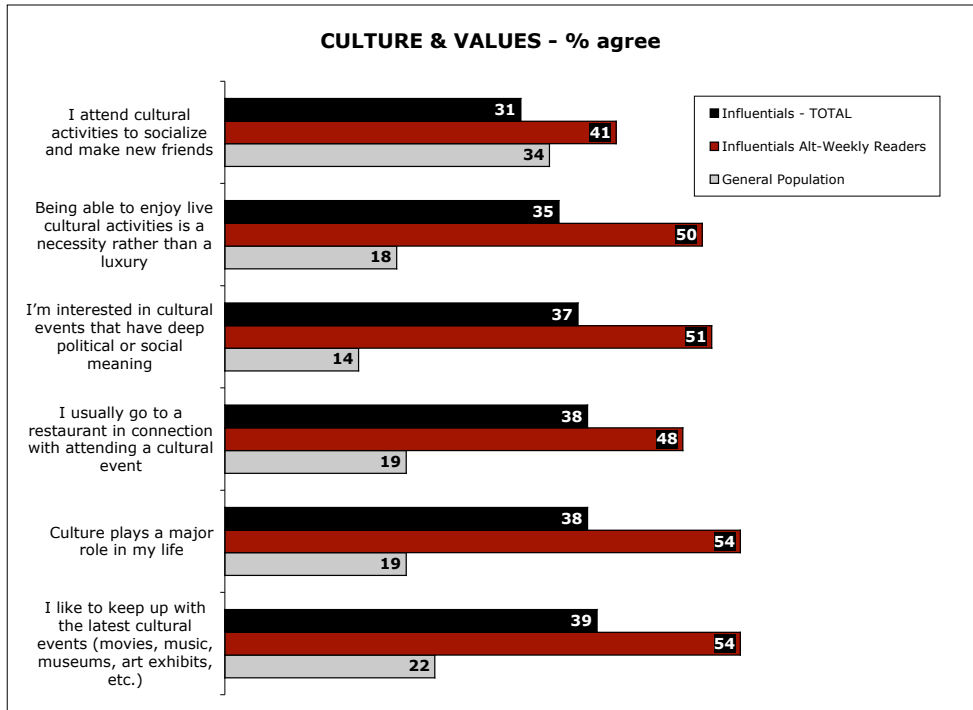
Some of the largest gaps are in advice on cultural activities such as live music/concerts, museums and live theater. Seven in ten Influential readers (72%) and six in ten Influentials (60%) have recommended live music/concerts or museums (66% Influential readers and 57% total Influentials) frequently or sometimes compared to 44% and 33% respectively of the general public. Almost two-thirds of Influential readers (63%) and nearly half of Influentials (47%) have given advice on theatrical performances, compared to one-fourth of the general public (26%).

Double-digit gaps also exist for recommendations on books (81% Influential readers, 78% total Influentials vs. 56% general public), vacation destinations (77% Influential readers, 71% total Influentials vs. 58% general public) and web sites (88% Influential readers, 87% total Influentials vs. 76% general public).

Culture is very important to Influentials in general, and Influential newsweekly readers in particular.

Half of Influential readers (54%) and nearly four in ten of all Influentials (38%) believe that culture plays a critical role in their lives, compared to just 19% of the general public.

In fact, it's so important that one-third of Influential readers



(34%) and almost one in five total Influentials (19%) choose where they live based on access to cultural activities compared to 7% of the general public. This feeling about culture may have been instilled early in their lives. Six in ten Influential readers (63%) and half of Influentials were exposed to culture at an early age compared to 24% of the general public.

Fifty percent of Influential newsweekly readers and more than one-third of all Influentials (35%) agree that being able to enjoy live cultural activities is a necessity rather than a luxury. By comparison, 18% of the general public think cultural events are a necessity.

Influentials tend to plan their activities earlier in the week. Thirty-seven percent agree they like to plan their weekends on Wednesday or Thursday. Three in ten of all Influentials (29%) also agree they like to get a head start on their weekend plans, compared to one-fifth of the general public (20%).

Influentials derive multiple benefits from culture—entertainment, a chance to socialize and intellectual stimulation

Influentials place a value on live cultural events. Two-thirds believe that live performances are more meaningful and exciting than watching performances on TV (66%) compared to half of the general public (49%). Among Influential newsweekly readers this number rises to 77%.

Cultural activities are as important in Influentials' lives as parks, especially among readers. More than seven in ten (73%) Influential readers and 62% of all Influentials agree that cultural activities and parks are equally important, compared to just four in ten of the general public. Fifty-nine percent of Influential readers and 43% of all Influentials don't think the government is spending enough to promote culture in the community versus 29% of the general public.

For social Influentials, cultural events offer the opportunity to be entertained and socialize at the same time. Almost twice as many Influentials (60%) as those in the general public (34%) say they attend cultural activities for the entertainment value. That number is 70% for the Influential alternative newsweekly reader. Four in ten Influential readers and 31% of all Influentials, versus 15% of the general public, agree they attend cultural activities to socialize and make new friends.

Attending a cultural activity is seen as part of a total social occasion. Influentials, in general, and Influential readers, in particular, are more likely than the general public (48% of readers, 38% of all Influentials vs. 19% of the general public) to go to a restaurant when they attend a cultural event or do some shopping along with going to a cultural activity (36% of readers, 28% of all Influentials vs. 16% of the general public).

Not only do Influentials want their cultural activities to be entertaining, they think it should be thought-provoking. Half of Influential readers and 37% of all Influentials are interested in cultural events that have deep political or social meaning. In comparison, only 14% of the general public feel this way.

Cost determines what cultural activities Influentials engage in

Price is the number-one influence in cultural buying decisions. Three-fourths of Influentials cite price as an influential factor, across all income groups.

More than half of Influentials say word of mouth (57%) and location of event (55%) are determining factors in cultural activities. A full one-third rely on reviews (35%) and articles on performances/artists (33%) to help them decide which cultural events to attend.

Influentials like to entertain and eat out when they can

Since Influentials agree that cultural events offer the opportunity for socializing and entertaining, it is not surprising that they also like to entertain. Three-fourths of Influential readers (74%) and two-thirds of all Influentials entertain family and friends once a month or more often. This compares to 52% of the general public who entertain family and friends once a month or more. Eating out at least once a week is enjoyed by 61% of Influential readers and 54% of all Influentials versus 48% of the general public.

Influentials are culturally active as well. They go to live performances – theater, concerts, dance – and visit museums more often than the general public.

- ❑ One in six (17%) Influential readers and 9% of all Influentials compared to 5% of the general public go to the theatre at least once a month.
- ❑ Influentials like to listen to music - both recorded and live. An overwhelming majority of all groups listen to recorded music at least once a week (84% of Influentials readers, 80% of all Influentials, 72% of general public). However, when it comes to live music, Influentials go almost twice as often as the general public. On average, Influential alternative newsweekly readers attend a live concert 6 times a year.
- ❑ Three times more Influential readers, and twice as many total Influentials than members of the general public, go to the ballet or other live dance program at least once a year.
- ❑ More than four in ten Influential readers (45%) and three in ten total Influentials (32%) compared to 15% of the general public attend the ballet once a year or more.

Influentials welcome a good deal or a bargain

Six in ten or more would be very or somewhat likely to chose a restaurant (69%) or retailer (62%) if offered a discount with their ticket stub. Likewise, similar percentages would be very or somewhat likely to purchase multiple tickets and get one at a discounted price (68%).

More than half of Influentials (55%) would purchase multiple tickets and get a “free parking” voucher. Another 44% are likely to purchase multiple tickets in order to get a discounted price on parking. In total the general population is just as likely as Influentials to take advantage of a good deal. About six in ten or more would be very or somewhat likely to chose a restaurant (64%) or retailer (59%) if offered a discount with their ticket stub. Fewer of the general population than Influentials would be very or somewhat likely to purchase multiple tickets and get one at a discounted price (58%) or would purchase multiple tickets and get a “free parking” voucher (48%).