

AMERICANS AND THE ARTS

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Highlights from a nationwide survey of public opinion

Conducted by the National Research Center of the Arts, an affiliate of Louis Harris and Associates, Inc.

The Americans and the Arts survey was sponsored by Philip Morris Companies Inc.

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This booklet is published by the American Council for the Arts (ACA). Additional copies are available from the ACA. Please send check for \$2.00 per copy (includes postage and handling) to Publications Department, American Council for the Arts, 1285 Avenue of the Americas, New York, N.Y. 10019. Copies of the full survey, including analysis, tables, and survey methodology, are also available for a postage and handling fee of \$9.00 per copy. For both publications, volume discounts are available. For further information, write to ACA Books at the ACA, or phone (212) 245-4510.

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ISBN: 0-915400-65-0

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THE ARTS ARE ESSENTIAL, NOT ELITE

This year's Americans and the Arts is the fifth in a series of surveys, beginning in 1973, which probe Americans' perceptions of and participation in the arts. One key finding has held true through all of them: the arts are not elite pastimes, but part of the very fabric of American life. A solid majority of Americans attend arts events, and large groups actively participate in art forms ranging from photography to ethnic dance. Every year more people attend arts events than sports events.

But the arts and those who support them now face their biggest challenge in the last 15 years. The continuing decline in leisure time for most Americans is beginning to take its toll on the arts. For the first time since the inception of this survey, the audience for the arts is contracting rather than expanding, with reported attendance levels down by about 12% since 1984.

Even so, the arts have managed to compete for Americans' dwindling free time with surprising success against such other leisure pursuits as sports, travel, and relaxing. But that is cold comfort; if the arts are to continue to thrive in the face of new time constraints, our society must look for new ways to bring them to the public.

That is why this edition of Americans and the Arts looks closely at the potential of videocassette recorders as a medium of growth for the arts. There is also an expanded section on Americans' attitudes—highly positive—toward the place of individual artists in society.

Sponsoring Americans and the Arts goes hand in hand with Philip Morris's 30 years of support for arts activities ranging from museum exhibitions to theater and jazz performances and avant garde events. For us, the arts epitomize the spirit of innovation and challenge without which no business can thrive. We believe, moreover, that supporting the arts is one of the best ways to enhance the quality of life in the communities where we live and do business.

We hope this survey encourages the exploration of new forms of presentation as well as ways to build on traditional ones, so that artists and arts organizations can continue their vital role in the life of communities across America.

Hamithelnaxuet

Hamish Maxwell
 Chairman and
 Chief Executive Officer
 Philip Morris Companies Inc.

EXECUTIVE SUMMARY

The pressures of life in two-income families in a service economy have reduced the leisure time that Americans report by 8% in the three years since the last survey, and by 37% compared with 15 years ago. Remarkably, the arts seem to be holding their own in the ever-diminishing number of free hours available to Americans. But if the arts are to grow, it seems they must reach out to people in new ways. In particular, videocassette recorders hold enormous potential as a way of reaching larger audiences.

<u>The Decline of Free Time.</u> Americans report a median 16.6 hours of leisure time each week, a decline of 9.6 hours over the last 15 years.

Arts Under Pressure. For the first time since 1973, the number of people who say they attend arts events has fallen: by 12% since 1984. Hardest hit have been:

□ opera and musical theater — down 38%
□ classical music concerts — down 26%

□ live theater — down 25%.

The arts obviously face a mounting challenge. Although Americans remain strongly interested in the arts, new avenues of reaching audiences must be explored.

Active Participation Fares Better than Attendance. Not only has the number of people who attend arts events declined, but so has the number who say they personally participate in arts activities like painting or creative writing. Of 11 disciplines examined, only 2 — photography and dance — increased their levels of participation. However, for participation the decline was less pronounced than in attendance—3% since 1984. Blacks, who report less leisure time

than whites, nonetheless have maintained higher levels of participation in creative writing, dance, and choral singing.
People Find Arts Events Inaccessible. The survey suggests that a scarcity of arts facilities and presentations are key impediments to the growth of arts audiences. ☐ 39% of those surveyed say they have no concert hall in their community. ☐ There is a great appetite for more arts presentations of all kinds. For example, 46% of those surveyed said they want more performances of plays and musicals where they live, compared to 30% who say they want more sports events.
The Decline of the Arts on Broadcast Television. In the three years since the last survey, TV has not become a medium of expansion for the arts. Reported TV viewing of five out of eight types of arts presentations declined, apparently due to insufficient programming. ☐ The biggest declines in reported viewing were for plays, operas, and concerts by opera stars. ☐ Yet well over half the people in the survey said that if more arts programs were offered on TV, they would be likely to view them.
The Explosive Potential of VCRs. In an era of diminishing leisure time, videocassette recorders are clearly the most promising medium of growth for the arts. More than half of all American households now own VCRs (up from one in six four years ago), and the survey shows that these households are likely to buy or rent "firstrate" arts videocassettes. The strongest demand is for:

 □ hit plays running on Broadway or in London □ pop concerts. The data on people who say they would rent or buy such arts cassettes indicate a potential market of \$2 billion a year.
<u>Pressure for Arts in the Schools.</u> After a decade of budget cutbacks, most Americans want to reinstate the arts as an integral part of the school curriculum.
☐ A solid majority of those surveyed favor regular full-credit courses in everything from creative writing (84% support) to dance (55% support).
☐ Two out of three people put arts courses on a par in educational importance with English, math, science, and social studies.
The Individual Artist in America. The vast majority of those surveyed see artists as "deeply dedicated and determined people" (93%) who are "highly important to the life of the country" (84%). However, this admiration does not automatically translate into a willingness to pay more taxes to support them. ☐ Most Americans still oppose government as-
sistance to individual artists, although the number opposed is declining. Seven out of ten still would rather see that backing come from corporations.
The Yearning for Live Art. Despite the dominance of television and VCRs, nine out of ten

The Yearning for Live Art. Despite the dominance of television and VCRs, nine out of ten people feel that seeing something performed live on stage is "more meaningful and exciting" than seeing it on TV. An equally high proportion feel that the arts are a vital part of the life of a community.

The popularity of the arts seems to have been undersold. While nearly three out of four people say they enjoy arts activities themselves, fewer than one in three firmly believe that "most" other people share their pleasures. By contrast, seven in ten think "most" people enjoy sports, despite the fact that attendance at arts events is greater than at sports events.

Financing the Arts. Support for government
arts funding has grown appreciably. And peo-
ple seem willing to dig deep to back up their
expressed wishes.
☐ Seven out of ten surveyed say they would
pay an additional \$10 a year in taxes to sup-
port the arts. That compares with 66% in
1984 and 51% in 1975.
☐ Eight in ten Americans favor corporate fund-
ing for the arts, and individual contributions
are on the rise.
☐ 34% of the people surveyed say they con-
tributed to an arts organization within the last
year, a marginal 1% increase over 1984.
☐ However, the median amount contributed
was \$61.60, up substantially from \$48.50 in
1984.

HIGHLIGHTS OF THE SURVEY

THE DECLINE OF FREE TIME: Life's Leisure Lost

Americans average 16.6 hours of leisure time a week, a drop of 8% in three years.

The continual decline in leisure time, a decrease of 8% since 1984, poses a fundamental challenge to the arts in America. This study looked especially at the rise of families in which both spouses hold down jobs. In the harried '80s, working parents — mothers in particular — apparently spend most of their free time holding the household together: taking care of children, shopping, arranging meals. One result is that the arts compete with other leisure activities for a dwindling number of hours.

The study showed:

- ☐ A slightly shorter reported work week: a median of 46.8 hours in 1987, down from 47.3 in 1984. This appears to reverse an upward trend since 1973, when the median was 40.6 hours.
- ☐ A further reduction in leisure time to a median of 16.6 hours a week, despite the slightly shortened work week, down from 18.1 hours in 1984 to 26.2 hours in 1973. This shows that since 1973 the average American's leisure time has shrunk by 9.6 hours a week, or 37%.

The age group suffering most from this decline is the baby boom generation, those aged 30 to 49. Typically shouldering the pressures of

growing children and both spouses working. these people report an average of only 14.6 leisure hours a week, down from 16.0 hours in 1984 The study also uncovered significant changes in three other groups: ☐ Women: In addition to their increased participation in the work force, women still bear the main responsibilities for child-rearing and upkeep of the home. As a result, their leisure time has dropped more than men's. Women report a median of 14.0 leisure hours a week down from 15.6 hours in 1984. In contrast, men report 19.0 leisure hours, down from 20.3 hours in 1984. ☐ Hispanics: Hispanics have a greater burden of life-sustaining activities than other groups. Hispanics report a drop to 13.0 hours of leisure a week from 18.0 in 1984. ☐ Blacks: Blacks emerge as the one group that has increased leisure time—from 12.2 hours a week in 1984 to 15.0 hours. Even with this

increase. however, Blacks still have less lei-

sure time than the overall average.

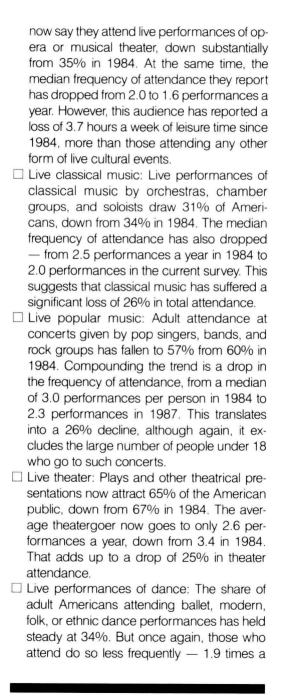
IMPACT ON THE ARTS: Holding Their Own

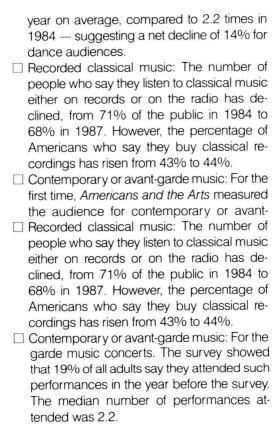
Reported attendance at arts events has declined 12% since 1984.

With the drop in leisure time, it is not surprising that the number of people who say they attend arts events has fallen, the first decline in 15 years. Arts organizations must face the challenge of attracting a public with considerably less leisure time.

Attendance has gone down an average of 12% since 1984 indicating that new means of reaching audiences must be explored.

Though the arts in general have suffered a decline in attendance, the two exceptions to this trend are art museums and movies. ☐ Art museums: Although the percentage of adult Americans who say they visit art museums has dropped from 58% in 1984 to 55% currently, reflecting the arts' narrower base, those who visit do so more frequently - a median of 1.8 times a year, compared to 1.4 times in 1984. The net result suggests a healthy 24% increase in museum visits. ☐ Movies: Similarly, the number of adults who say they go to the movies declined from 78% in 1984 to 74%. However, the median frequency of attendance rose from 4.3 times in 1984 to 4.9 times in 1987, indicating a 9% increase in total attendance. It should be remembered that the prime audience for movies is young people under 18, who are not included in this survey. Live performances of all kinds have been the losers: ☐ Live opera or musical theater: 27% of those surveyed (representing 47 million adults)





By any measure, the arts have had a real struggle since 1984. Pressures on budgets for the arts at all levels of government have constrained the supply of most arts presentations; the decrease in leisure time apparently has reduced the demand.

So far, one way the arts have managed to cope with America's loss of leisure time is by relying more heavily on frequent attenders, those who go to a specific type of arts presentation four or more times a year. Not surprisingly, these arts enthusiasts are people reporting more leisure time — 18.3 hours a week — than the average of 16.6 hours. While this has helped cushion the decline of overall arts attendance, it

has made the audience base narrower and more precarious.

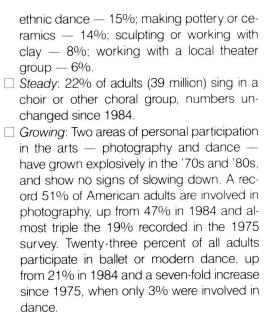
Harris's observation: While the arts have managed to hold their own, they have had to fight harder than ever for a share of Americans' dwindling free time. If leisure time goes down much further, arts attendance could continue to drop off as pressured individuals cut their leisure commitments even more. It is possible that attendance at performances and exhibitions is entering a period of absolute decline, and that the arts will be forced to look to new forms of distribution — possibly videocassettes — to expand.

INDIVIDUAL PARTICIPATION: Faring Better than Attendance

Participation in the arts has fallen by 3%; spectatorship by 12%.

For the first time since the original Americans and the Arts survey was conducted in 1973, the share of people who say they personally participate in arts activities such as painting or creative writing has fallen slightly: by 3% since the last survey. This decline is significantly smaller than the 12% drop in attendance and the 8% drop in leisure time, suggesting the high value Americans place on participatory arts activities.

☐ Slowing: Eight out of the 11 arts activities explored in the survey showed a marginal decline (3% or less) in the percentage of Americans who participate: needlepoint, weaving, and other handiwork — currently enjoyed by 41% of the public (72 million people); playing a musical instrument — 30% of the public, painting, drawing, and the graphic arts — 27%; writing stories or poems—24%; folk or



The study revealed patterns among groups who participate in the arts. For example, whites participate more than Blacks and Hispanics in ceramics, photography, needlework, and playing a musical instrument. Blacks show greater participation in creative writing, ethnic dance, and choral singing. Hispanics, with the least leisure time, lead all groups in painting and graphic arts, sculpture, and working with local theater groups.

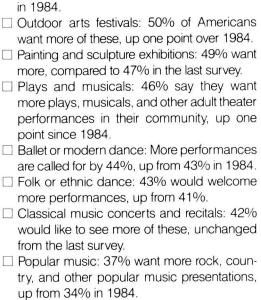
People who engage in creative writing and dance are concentrated in cities, and among the young (18- to 29-year-olds) and the highly educated. People involved in needlepoint, weaving, and other handiwork are more likely to be found in rural areas.

Clearly, while the surge in arts participation recorded from 1973 to 1984 has leveled off, the huge gains of the late '70s and early '80s are not easily erased; the arts have won a permanent place in the mainstream of American life.

OBSTACLES TO ATTENDANCE: You Can't Get There from Here

Nearly two out of five Americans say they have no concert hall in their community.

Over the years, Americans and the Arts has tried to determine what prevents people from attending more arts events than they do. While the forces eroding leisure time may be beyond the control of arts organizations, other barriers – such as a lack of arts facilities – are not. The main reasons people give for not attending arts performances are: ☐ "I don't have enough time." (33%) ☐ "Not very many performances are given in this area." (32%) ☐ "Ticket prices are too high." (29%) ☐ "It is too difficult to get from here to places where performances are given." (28%) "It is so difficult to find a parking place." (23%)"The costs of hiring a baby-sitter, eating out, and other costs are more than I can afford." (19%)The reasons given for not attending museums closely parallel those for the performing arts. In both cases, the lack of arts facilities and presentations are key deterrents. Indeed, the survey revealed a strong appetite for more local arts presentations. When guestioned about eight different types of arts events. up to 60% said they feel a need for more of them in their area. By way of comparison, only 30% said they want more sports events where they live. The eight types: ☐ Children's theater performances: 60% of the American public say they want more children's theater where they live, up from 59%



For many Americans, the essential problem is a lack of cultural facilities in their community. Thirty-nine percent report that their community has no concert hall or opera house; 31% say there is no theater in their community where plays or musicals can be performed; 37% say they have no easy access to a museum with artistic, scientific, or historical exhibitions.

Given the added time pressures that American adults say they are facing, new facilities and more frequent presentations apparently could help the arts tap far more of their potential audience.

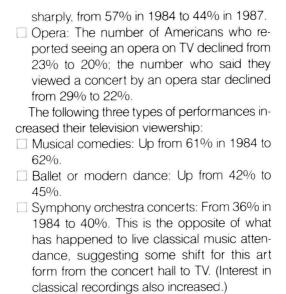
NEW DISTRIBUTION CHANNELS: The Arts on Broadcast Television

If more arts programs were broadcast, 73% said they would be likely to watch them.

The 1984 Americans and the Arts survey found that the number of people viewing arts performances on television rivaled the audience for live performances. With live audiences leveling off, might broadcast television be a medium through which the arts could expand? So far, apparently not. The current survey shows that five out of eight types of arts presentations reportedly are getting less television viewership than they were three years ago. But this seems to be due less to a lack of interest on the part of viewers than to a lack of enough arts programming to meet the demand.

When asked what types of cultural programs they had watched on television "during the past three months," those surveyed revealed these patterns:

Ш	iviovies: The share of people who say they
	watched at least one broadcast presentation
	of a top movie (defined as one that might be
	nominated for an Academy Award) dropped
	from 79% of the public in 1984 to 75%.
	Pop music: Those viewing at least one music
	concert by a leading rock or pop music
	group dropped from 59% to 54%.
	Plays: The percentage of the public that
	watched a play on television dropped



The survey suggests that by offering more arts programs, television could attract a broader audience. Fourteen percent of those polled said that if there were more such programs, they would "certainly" view them, and an additional 59% said they "probably" would. When asked what types of arts programs they would like to see more of on TV, the greatest number (40%) said they would like more top movies; the smallest number (7%) said they wanted more operas or concerts by opera stars.

Harris's observation: Television — with the exception of public TV and cable — may have underestimated the audience for arts programs. At a time when the major television networks are suffering a steady loss of viewers for their entertainment and sports shows, it may be sensible to reexamine the prospects for arts programming. In particular, live broadcasts, which only broadcast TV can provide, convey an electricity often lacking in taped performances.

THE EXPLOSIVE POTENTIAL OF VCRs: A \$2-Billion Arts Market

77% of VCR owners say they would probably rent or buy tapes of musical comedies.

There is little doubt that the fastest-growing medium of entertainment in America is the videocassette recorder. The share of households with VCRs jumped from 17% in 1984 to 55% in 1987. But that only begins to tell the story.

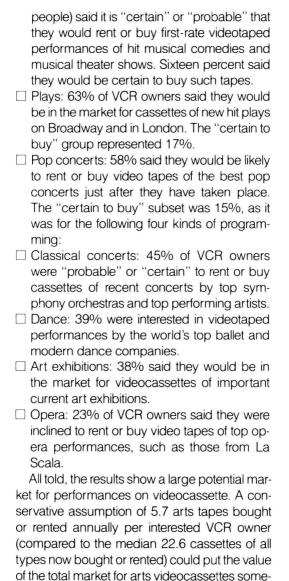
The frequency of renting or buying cassettes has skyrocketed, from a median of 5.8 per family in 1984 to 22.6 per family in 1987.

Videocasettes of all kinds were rented more than a billion times in the 12 months before the survey. With an average rental price estimated at \$1.99, the market for rented tapes is nearly \$2.6 billion annually. Nearly 104 million tapes were purchased in the same time period, at an average sale price of \$25, adding up to another \$2.6 billion.

The appeal of the VCR is two-fold: It allows viewers to tape programs off the air and watch them at their convenience, and it offers programs not available on TV. In both respects it disrupts traditional television watching (and programming) strategies. Forty-four percent of VCR owners (42 million adults) reported that they are "increasingly watching a movie or some other performance on a videocassette instead of watching regularly scheduled programs on TV." These are predominantly younger people — perhaps the wave of the future for TV and VCR usage.

The potential for arts videocassettes is strong:

Musicals: 77% of VCR owners (74 million



Harris's observation: Arts groups may want to watch this situation, taking care that a per-

where in the vicinity of \$2 billion a year.

centage of such revenues goes to developing artists and institutions as well as to those who make up the arts establishment.

Compared to VCRs, cable TV seems to hold less promise for expansion of the arts. Fewer households subscribe to cable (53%, compared to 55% for VCRs), and more important, cable — up only 6% since 1984 — is growing at a slower rate.

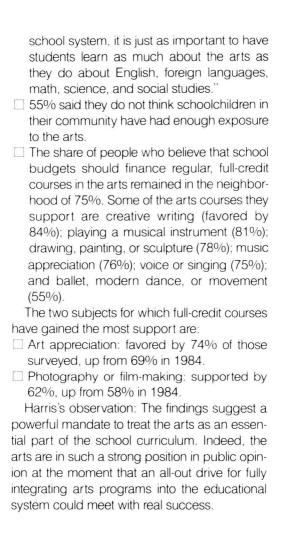
Furthermore, according to Harris's other data, cable audiences tend to be less educated and less arts-oriented than VCR owners. With a few exceptions, like the Arts and Entertainment Network, cable services simply have not succeeded in reaching the heart of the arts market.

ARTS IN THE SCHOOLS: Educating the Educators

84% favor full-credit courses in creative writing.

For more than a decade, the arts have been fighting a rear guard battle in the public school system. In school after school, arts programs have been put in jeopardy by budget cutbacks. Yet the study found that a solid majority of Americans want to keep the arts an integral part of the school curriculum.

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the school curriculum.
\square 91% believe that children in school should
"be exposed to theater, music, dance, exhi-
bitions of paintings and sculpture, and similar
cultural events."
\square 86% added that they would like their children
to have cultural opportunities that they them-
selves did not have.
☐ 67% believe, moreover, that "in order to have
well-rounded students turned out by the



CARING FOR INDIVIDUAL ARTISTS: Growing Support for Grants

Two out of three favor grants to developing artists.

In 1987, for the first time, Americans and the Arts explored what the American people think of artists, and what kind of support they are prepared to give them. □ 93% of those surveyed agree that artists "have to be deeply dedicated and determined people to survive as artists." ☐ 84% agree that artists are "highly important". to the life of the country as the current and potential creators of the art and culture that the nation needs to be a full and rich place to live." □ 83% believe that artists "are often overlooked for long periods of time, even though they have real creative talents." □ 81% say that "more than others, artists reflect what life is really like in a given time, so what artists do is an important part of the history of a community or country." □ 68% feel that "in their work, artists capture a." vision of the future that few others in other occupations achieve in their work." ☐ 66% agree that artists "work very hard for very little money." At the same time, majorities reject many common negative descriptions of artists: Artists are people who "don't want to settle down to a normal job like most other people have to" (81% disagree); they "don't know how to give an hon-

est day's work for an honest day's pay" (79%); most artists "are not very disciplined people" (65%), and they "tend to be hard people to work with and get along with" (51%).

Clearly, the American public values its professional artists and empathizes with the hard life they have chosen for themselves.

However, admiration does not automatically translate into willingness to help individual artists financially. This country has no strong tradition of backing individual artists, and most people still oppose government financial assistance for them. But the survey did show that this attitude is softening:

☐ 51% of Americans now say they oppose
federal help for individual artists, compared
to 58% in 1984.
☐ 51% oppose state government offering such
assistance, down from 57% in 1984.
☐ 53% oppose local government assistance,
down from 55%.
Private funding for artists proved to be a dif-
ferent matter:
☐ A 69% majority favor corporate financial as-
sistance for artists, up from 49% in 1975 and
from 63% in 1984.
\square An even larger 89% majority would like to
see financial help come from individual con-
tributors. (This was the first time this question
was included in the survey.)

People were informed that in Canada, France, the Netherlands, and Scandinavia, special funds are set up by the government and private donors to make grants to developing artists, to buy their works, and to provide professional training facilities. Those participating in the survey were then asked if there should be similar programs in the U.S. More than two out of three said yes.

Harris's observation: Public apathy about helping individual artists may simply be a matter of not knowing the options that are available.

LIVE ART: Hard to Live Without

Nine out of ten find live performances more "meaningful and exciting" than televised ones.

A majority of Americans are quite particular about the importance of live performances. A strong 90% feel that "to see something performed live on stage is more meaningful and exciting than watching it on TV." The study also showed that: ☐ An even higher 93% believe that "museums are an important resource for the whole community because they tell us so much about the art and history of different cultures or about science and our environment." □ 93% also feel that museums and music performances "make a community a better place to live." ☐ 90% feel that "some means should be found to present more performances of music, theater, and dance in all parts of the country so that all Americans have an opportunity to attend." This powerful conviction that the arts are a salutary element in the social fabric is buttressed by more personal feelings. Here is how people responded when asked what the arts "do for you": ☐ 74% say the arts "just give you pure pleasure to experience or to participate in." □ 73% feel that the arts offer them "a positive experience in a troubled world." ☐ 71% say that if no arts were available in their community, they would "personally miss" them.

□ 67% believe that the arts enable them to "find a source of creative expression and experience that is rare."

The survey uncovered a curious phenomenon. As much as people enjoy the arts themselves, they apparently are more skeptical about the enjoyment of others. While nearly 75% say they personally enjoy arts activities, only 29% strongly agree that "most people" enjoy attending the arts, compared to 69% who strongly agree that "most people enjoy attending sports events."

Harris's observation: The arts, it seems, have been under-promoted and under-funded, with most people having to discover on their own how much of the public appreciates the arts.

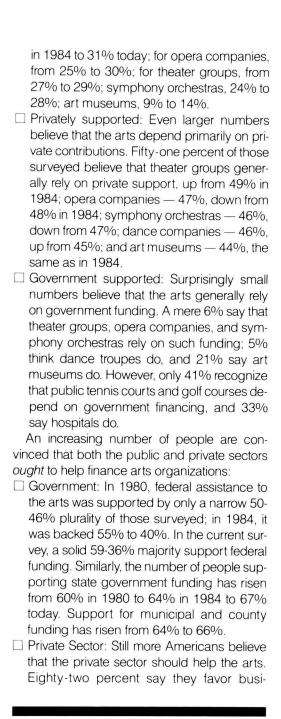
FINANCING THE ARTS: A Willingness to Pay More

70% of Americans are willing to pay an additional \$10 a year in taxes to support the arts.

Since 1980 many public officials have argued that the arts should not depend on the government for financial support. Perhaps because of this, according to Harris, the public increasingly perceives the arts as either self-supporting or predominantly financed by private contributions.

Here are the public's perceptions of how the arts are funded:

☐ Self-supporting: The number of respondents who believe that ticket sales, membership fees, and other earned income are generally enough to support most arts organizations has modestly increased. For dance groups, the number has risen from 30% of the public



nesses and corporations giving financial assistance to the arts, up from 77% in 1984. Eighty-three percent look to foundations, up from 81%. The one type of giving that has lost support is individual giving to the arts, with 79% saving they approve of it.

Harris's observation: This seems to reflect the growing feeling that individual contributions cannot do the job alone.

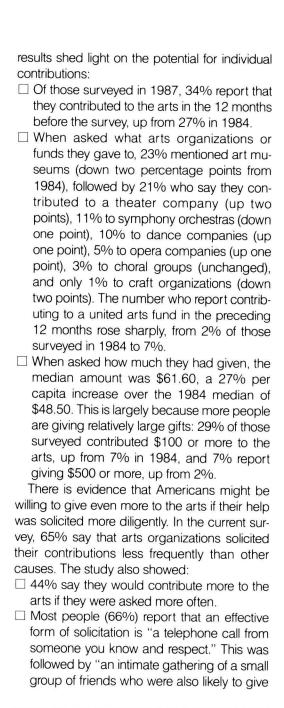
It is significant that the public's support for federal assistance to the arts has increased during a decade when the pressures to cut or eliminate such assistance have been enormous. However, one acid test is how much more people are willing to pay in taxes to finance the arts.

Participants in the survey were informed that each year the federal government pays out more than \$900 per capita for defense, \$140 for education, and no more than 75 cents for the arts. They were then asked how much more federal tax they would be willing to pay to support arts activities and facilities.

- \$25 more: In 1975, 41% of those surveyed said they would be willing to pay an additional \$25 in taxes to support the arts. That number has climbed, from 51% in 1980 and 53% in 1984, to 56%.
- □ \$10 more: The number of people in the survey willing to pay \$10 more in taxes has risen even more sharply, from 51% in 1975, past 65% in 1980 and 66% in 1984, to 70%.

Harris's observation: This growing support for government assistance has important implications for arts funding. Private giving increases when the government backs the arts, because private contributors tend to follow the government's lead in deciding what organizations are worth contributing to.

Since 1984, *Americans and the Arts* has examined trends in personal giving to the arts. The



to the same campaign" (57%).
\square A large majority (68%) say they would like a
matching grant arrangement in which their
employer would contribute to the arts an
amount equal to what they contribute them-
selves.
Classic Americans' willingness to aumport

Clearly, Americans' willingness to support the arts echoes their view that the arts are an integral part of their lives.

A note on the survey: This fifth survey of Americans and the arts was conducted among a cross-section of 1,501 men and women aged 18 and over, constituting a national sample. Participants were scientifically selected so that the factors of age, sex, race, education, income, community size, and region were proportionate to the entire adult population of the United States. Interviews were conducted by telephone from March 13 through April 6, 1987.



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