What is Culture Track?
An Ongoing Study

2001  2003  2005

2008  2011  2014
An Ongoing Study

of the
Attitudes
Motivators
Barriers

of
Culturally active audiences
Why Culture Track?
Build upon leading research studies
Go Deeper
into meta trends, such as:

• search for authenticity
• self-curation
• collaborative consumption
Understand what’s really driving or discouraging cultural consumers
Understanding today’s audiences
Today’s cultural audiences are complicated and ever-changing.
So Culture Track asked them...
what? how? why?
First, some background
Methodology
Data collected from 4,026 people in all 50 states +/−1.6% margin of error
4 audience segments by age

18 to 29
Millennials

50 to 69
 Boomers

30 to 49
Gen X

70+
 Pre-War
What we learned
Cultural Landscape
Participation has increased for a majority of art forms, with some exceptions.
PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR

Living museums 2011: 79 2014: 82
History museums 2011: 69 2014: 72
Art museums 2011: 58 2014: 60
Musical theater 2011: 49 2014: 52
Dramatic theater 2011: 56 2014: 48
Classical music 2011: 35 2014: 43
Modern dance 2011: 23 2014: 22
Classical dance 2011: 25 2014: 18
Opera 2011: 19 2014: 15
PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR (INCREASES)
PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR (DECREASES)

Living museums: 79% (2011) to 82% (2014)
Science museums: 62% (2011) to 73% (2014)
History museums: 69% (2011) to 72% (2014)
Art museums: 58% (2011) to 60% (2014)
Musical theater: 49% (2011) to 52% (2014)
Dramatic theater: 56% (2011) to 48% (2014)
Classical music: 35% (2011) to 43% (2014)
Modern dance: 23% (2011) to 22% (2014)
Classical dance: 25% (2011) to 18% (2014)
Opera: 19% (2011) to 15% (2014)
Although audiences are attending a wider variety of activities, frequency is down.
NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH

- **None**: 30% (2014), 27% (2011), 27% (2007)
- **1 to 2 Events**: 54% (2014), 51% (2011), 42% (2007)
The oldest and youngest ends of the spectrum participate most often.
NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH (BY GENERATION)

- **Events per month**
  - 1.75x / month
  - 1.41
  - 1.36
  - 1.67

- **Generations**:
  - Millennials
  - Gen X
  - Boomers
  - Pre-War
The effect of the economic downturn lingers.
ECONOMIC REASONS FOR DECREASING CULTURAL PARTICIPATION

- Reducing expenses across the board: 77% (2011) vs. 82% (2014)
- Cutting back on leisure activities: 51% (2011) vs. 51% (2014)
- Reprioritizing time/money spent on leisure: 47% (2011) vs. 51% (2014)
- Prefer to spend more time at home: 27% (2011) vs. 29% (2014)
ECONOMIC REASONS FOR DECREASING CULTURAL PARTICIPATION

- Reducing expenses across the board
  - 2011: 77%
  - 2014: 82%

- Cutting back on leisure activities
  - 2011: 51%
  - 2014: 51%

- Reprioritizing time/money spent on leisure
  - 2011: 47%
  - 2014: 51%

- Prefer to spend more time at home
  - 2011: 27%
  - 2014: 29%
But people are defining culture even more broadly ... 

... and they are open to new experiences.
79% define as a cultural activity
87% participate at least once per year

national, state or municipal park
66% define as a cultural activity

34% participate at least once per year

broadcast of a live performance at a movie theater
64% define as a cultural activity
73% participate at least once per year

food and drink experiences
51% define as a cultural activity

84% participate at least once per year

non-commercial television
Motivators & Barriers
Cultural audiences are seeking both entertainment and enlightenment ...
... and it’s less about being “in-the-know” than it is about being with who you know.
# Reasons to Make Culture a Part of One's Life

<table>
<thead>
<tr>
<th>Reason</th>
<th>2011</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment &amp; enjoyment</td>
<td>89</td>
<td>93</td>
</tr>
<tr>
<td>Time with friends/family</td>
<td>84</td>
<td>83</td>
</tr>
<tr>
<td>Expand my perspective</td>
<td>n/a</td>
<td>79</td>
</tr>
<tr>
<td>Interest in subject</td>
<td>73</td>
<td>77</td>
</tr>
<tr>
<td>Learn about other cultures</td>
<td>69</td>
<td>76</td>
</tr>
<tr>
<td>Introduction to new things</td>
<td>68</td>
<td>73</td>
</tr>
<tr>
<td>Support my community</td>
<td>64</td>
<td>67</td>
</tr>
<tr>
<td>Escape stress</td>
<td>67</td>
<td>66</td>
</tr>
<tr>
<td>Celebrate my heritage</td>
<td>57</td>
<td>52</td>
</tr>
<tr>
<td>Be “in the know”</td>
<td></td>
<td>31</td>
</tr>
</tbody>
</table>

Yearly data comparison:
- **2011**
- **2014**
KEY INSIGHT: MOTIVATORS

Not so carefree: The younger you are, the more culture is about escaping stress.
REASONS TO MAKE CULTURE A PART OF ONE’S LIFE (BY GENERATION)

- **Escape stress**
  - Pre-War: 73%
  - Boomers: 69%
  - Gen X: 64%
  - Millennials: 47%

Legend:
- M: Millennials
- X: Gen X
- B: Boomers
- P: Pre-War
What are the big barriers?

Cost, content and (in)convenience.
BARRIERS TO ATTENDING CULTURAL ACTIVITIES

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost</td>
<td>68</td>
<td>70</td>
</tr>
<tr>
<td>Unappealing topic</td>
<td>50</td>
<td>56</td>
</tr>
<tr>
<td>It’s a hassle to get there</td>
<td>39</td>
<td>44</td>
</tr>
<tr>
<td>Can’t find anyone to go with</td>
<td>26</td>
<td>28</td>
</tr>
<tr>
<td>Difficult to find the time</td>
<td>23</td>
<td>28</td>
</tr>
<tr>
<td>Inconvenient hours</td>
<td>20</td>
<td>28</td>
</tr>
<tr>
<td>I find it unwelcoming</td>
<td>9</td>
<td>13</td>
</tr>
</tbody>
</table>
BARRIERS TO ATTENDING CULTURAL ACTIVITIES

- **Cost**: 68% (2011) vs. 70% (2014)
- **Unappealing topic**: 50% (2011) vs. 56% (2014)
- **It’s a hassle to get there**: 39% (2011) vs. 44% (2014)
- **Can’t find anyone to go with**: 26% (2011) vs. 28% (2014)
- **Difficult to find the time**: 23% (2011) vs. 28% (2014)
- **Inconvenient hours**: 20% (2011) vs. 28% (2014)
- **I find it unwelcoming**: 9% (2011) vs. 13% (2014)
KEY INSIGHT:

BARRIERS (1)

Traveling in packs: Almost 1/2 of Millennials won’t attend if it means going alone.
BARRIERS TO CULTURAL PARTICIPATION (BY GENERATION)

Can’t find anyone to go with

43
26
25
27

M: Millennials
X: Gen X
B: Boomers
P: Pre-War
KEY INSIGHT:
BARRIERS (2)

Not for me: Over 3/4 of Pre-Wars stay away if they feel the programming is not for them.
BARRIERS TO CULTURAL PARTICIPATION (BY GENERATION)

Pre-War:
Unappealing topic: 47

Boomers:
Unappealing topic: 49

Gen X:
Unappealing topic: 61

Millennials:
Unappealing topic: 77
Technology & On-Site Experience
Ownership of mobile devices has skyrocketed since 2011.
OWNERSHIP OF MOBILE DEVICES

<table>
<thead>
<tr>
<th>Devices</th>
<th>2011</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>31</td>
<td>66</td>
</tr>
<tr>
<td>Tablet/E-Reader</td>
<td>18</td>
<td>64</td>
</tr>
<tr>
<td>iPod/MP3 Player</td>
<td>42</td>
<td>63</td>
</tr>
</tbody>
</table>
Yet, few are using mobile devices to enhance their cultural experience on-site.
OWNERSHIP vs. ON-SITE USAGE OF MOBILE DEVICES

- **Smartphone**: 66 (Ownership), 20 (On-Site Usage)
- **Tablet/E-Reader**: 64 (Ownership), 10 (On-Site Usage)
- **iPod/MP3 player**: 63 (Ownership), 7 (On-Site Usage)

2014
Ownership

2014
On-Site
Usage at a
Cultural
Experience
This is a transitional moment for using technology in cultural experiences ...
... and the audience is leading the way in defining the new norms.
KEY INSIGHT: TECH USE ON-SITE

The “selfie moment:” Tech-savvy audiences are all about taking and sharing photos on their smartphones.

Image Credit: Museum Hack
MOBILE DEVICE ACTIVITIES
(BY THOSE WHO USE A DEVICE ON-SITE)

- Taking photos: 66
- Sharing photos: 47
- Browsing cultural org’s website: 35
- Using a search engine: 34
- Social media “check in”: 31
- Reading/commenting about event on social media: 24
- Using cultural org’s mobile app: 15

Year: 2014
Audience Loyalty
Loyalty continues to decline.
VISUAL ARTS

26\%
% w/Memberships

PERFORMING ARTS

23\%
% w/Subscriptions
VISUAL ARTS

% w/Memberships

26 15

PERFORMING ARTS

% w/Subscriptions

23 10
For visual arts membership, affinity and value matter most.
MOTIVATIONS TO PURCHASE VISUAL ARTS MEMBERSHIPS

Support orgs I like
- 2007: 60
- 2011: 45
- 2014: 47

Less expensive tickets
- 2007: 49
- 2011: 43
- 2014: 42

Discounts on parking, merch, and food
- 2007: 27
- 2011: 35
- 2014: 37

Members-only events
- 2007: 42
- 2011: 40
- 2014: 35

Special exhibitions
- 2007: 41
- 2011: 42
- 2014: 35

Permanent collection
- 2007: 39
- 2011: 38
- 2014: 23
MOTIVATIONS TO PURCHASE VISUAL ARTS MEMBERSHIPS

For performing arts subscribers, value and content steal the show.
MOTIVATIONS TO PURCHASE PERFORMING ARTS SUBSCRIPTIONS

<table>
<thead>
<tr>
<th>Motivation</th>
<th>2007</th>
<th>2011</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less expensive tickets</td>
<td>49</td>
<td>53</td>
<td>53</td>
</tr>
<tr>
<td>Type of performance</td>
<td>56</td>
<td>56</td>
<td>52</td>
</tr>
<tr>
<td>Support local orgs</td>
<td>41</td>
<td>39</td>
<td>41</td>
</tr>
<tr>
<td>Subscribers-only events</td>
<td>26</td>
<td>27</td>
<td>19</td>
</tr>
<tr>
<td>Simplify planning</td>
<td>22</td>
<td>29</td>
<td>11</td>
</tr>
</tbody>
</table>
KEY INSIGHT: PERFORMING ARTS LOYALTY DRIVERS

DIY:
Fewer subscribers want you to choose for them.
MOTIVATIONS TO PURCHASE PERFORMING ARTS SUBSCRIPTIONS

What’s on tap for the future?
integrated mobile activities
redefined loyalty models
multi-sensory, multidisciplinary, mixed-use
expanding definition of culture
Download Culture Track at:

LaPlacaCohen.com/culturetrack