



# CULTURE TRACK '14

@LaPlacaCohen #culturetrack

# 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



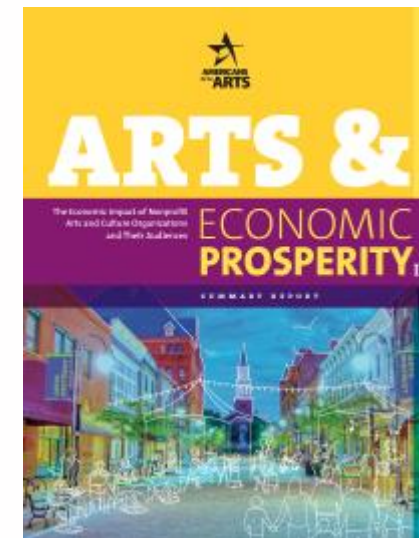
HOW A NATION ENGAGES WITH ART  
HIGHLIGHTS FROM THE 2012 SURVEY OF PUBLIC PARTICIPATION IN THE ARTS



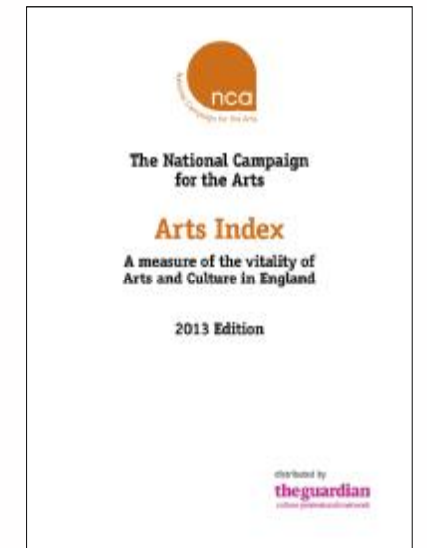
NATIONAL BLUEPRINT FOR THE ARTS



TrendsWatch  
2014



ARTS & ECONOMIC PROSPERITY IV  
The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences  
SUMMARY REPORT



The National Campaign  
for the Arts  
**Arts Index**  
A measure of the vitality of  
Arts and Culture in England  
2013 Edition

distributed by  
theguardian  
culture@theguardian.com

# Go Deeper

into meta trends, such as:

- search for authenticity
- self-curation
- collaborative consumption



**Understand**  
what's really driving  
or discouraging  
cultural participation

Audiences are ...

self-focused

overcommitted

hyper-connected

overstimulated

promiscuous

cynical



but curious

Today's cultural audiences  
are complicated and  
ever-changing.

So Culture Track asked  
them...

what?

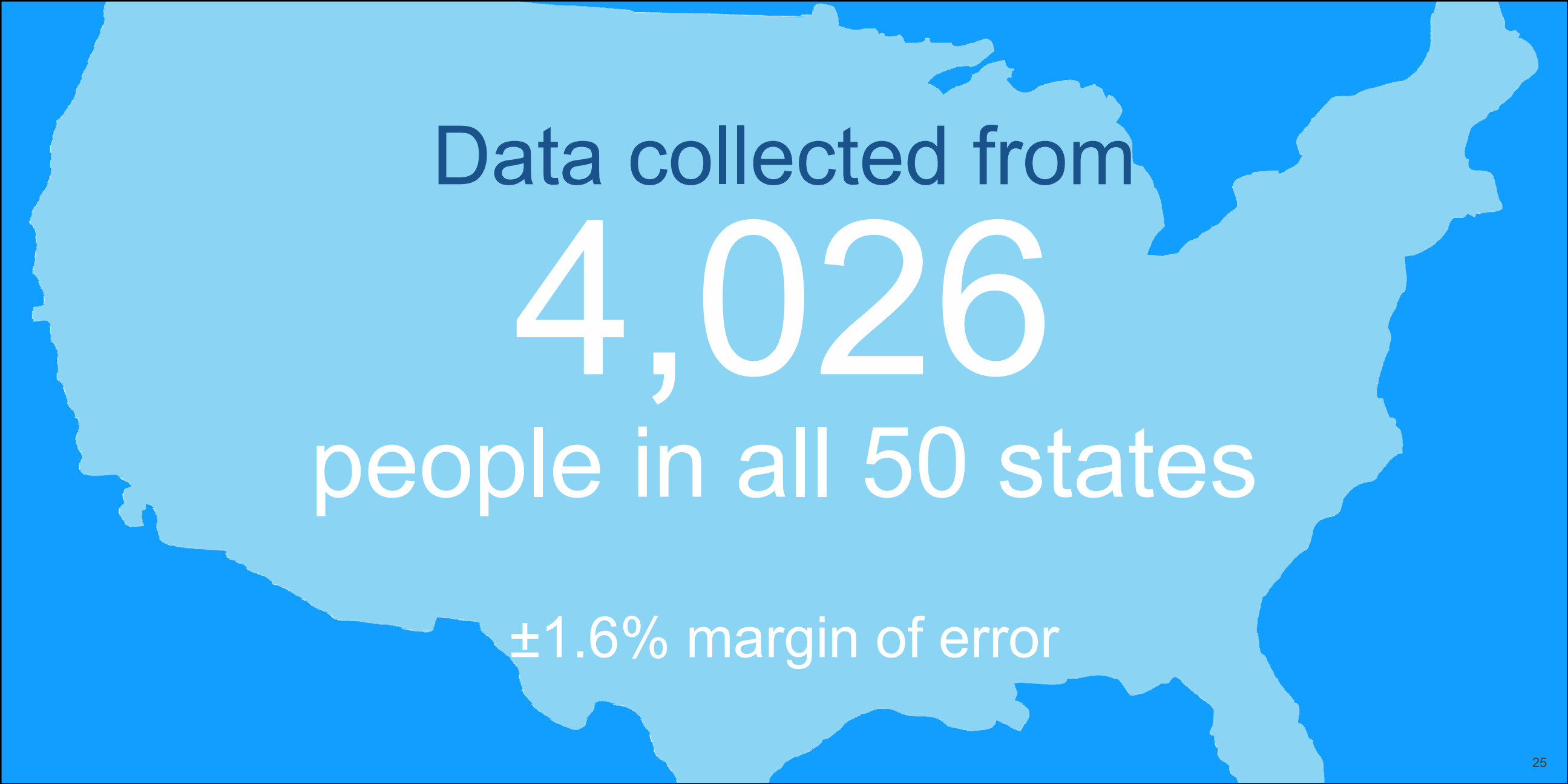
how?

why?

First, some  
background

# Methodology



A light blue map of the United States is centered on the page. The map shows the outlines of the 50 states and the surrounding oceans. The text is overlaid on the map.

Data collected from  
**4,026**  
people in all 50 states

±1.6% margin of error

# 4

audience segments by age

**M**

**X**

**B**

**P**

18 to 29

**M**illennials

30 to 49

Gen **X**

50 to 69

**B**oomers

70+

**P**re-War

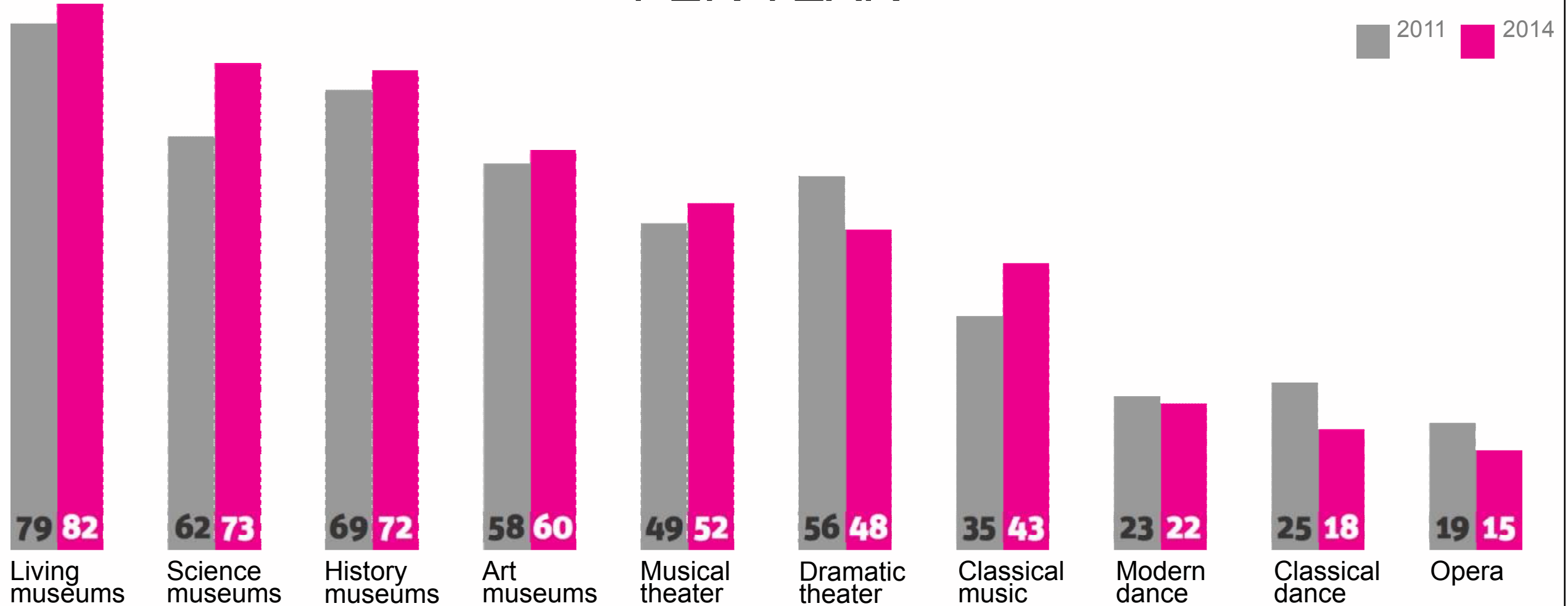
What we  
learned

# Cultural Landscape

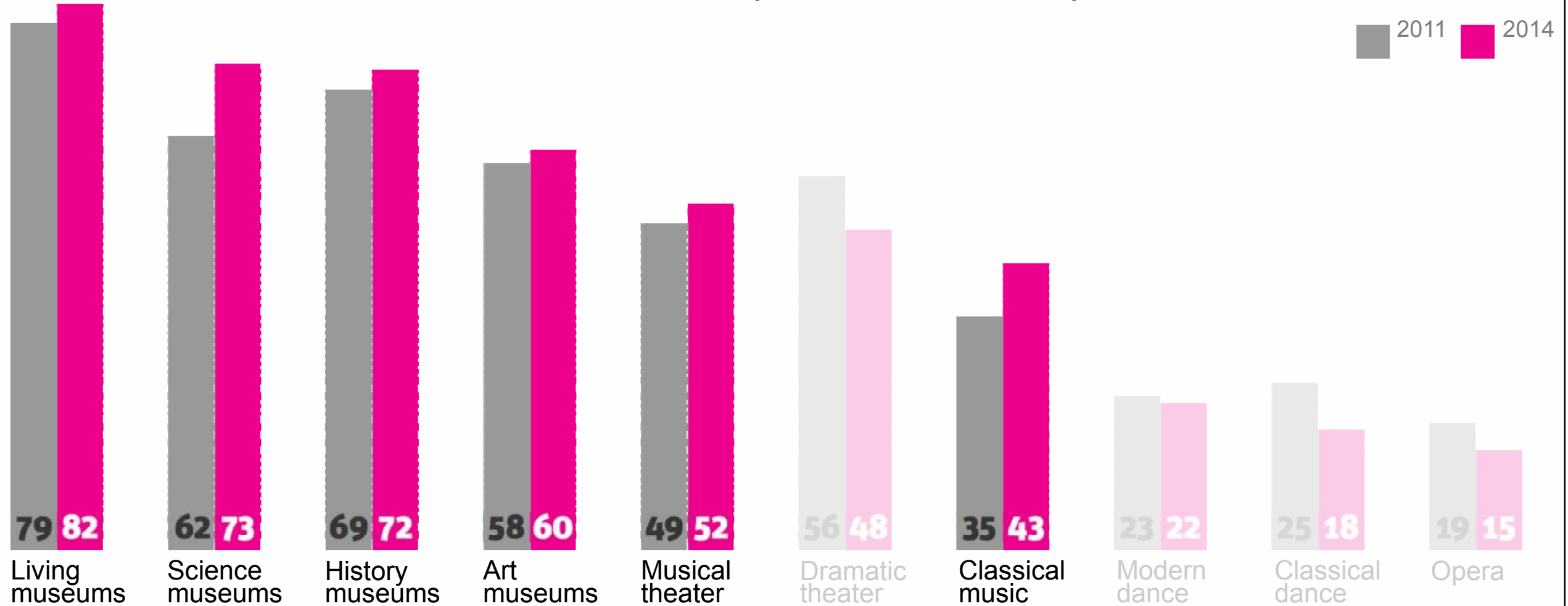


Participation has increased for a majority of art forms, with some exceptions.

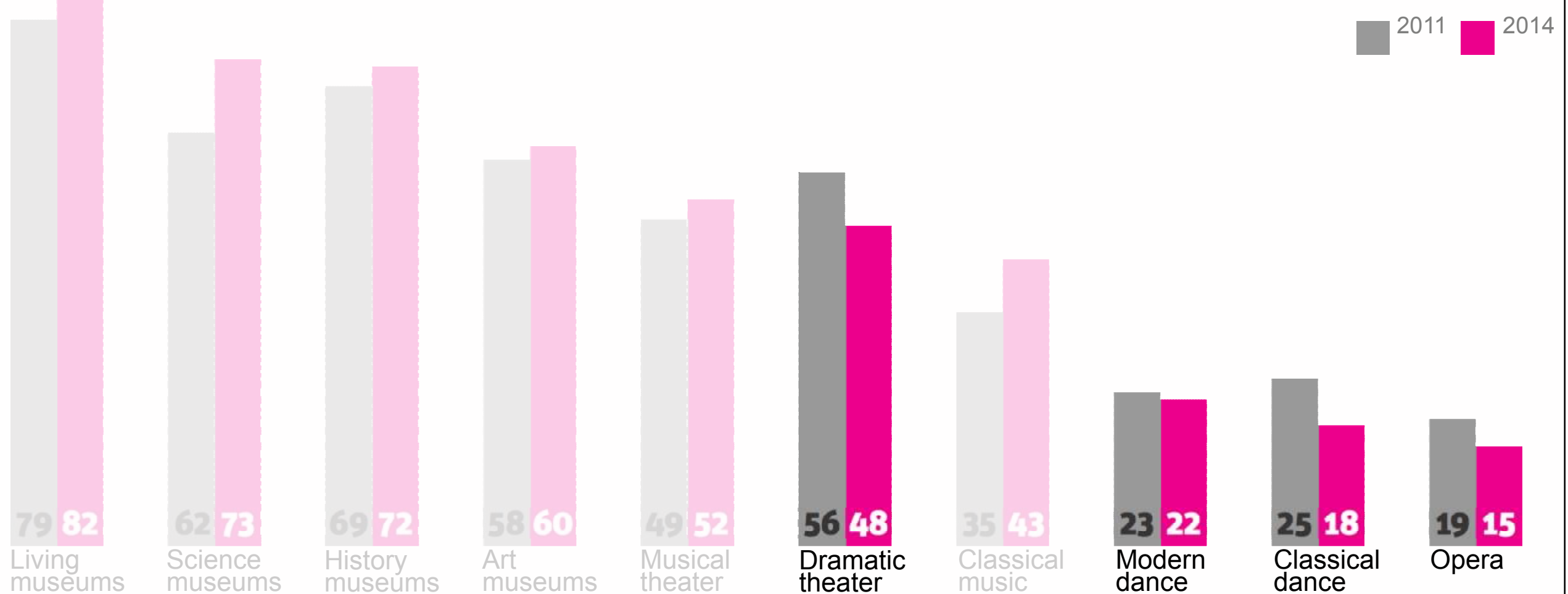
# PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR



# PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR (INCREASES)

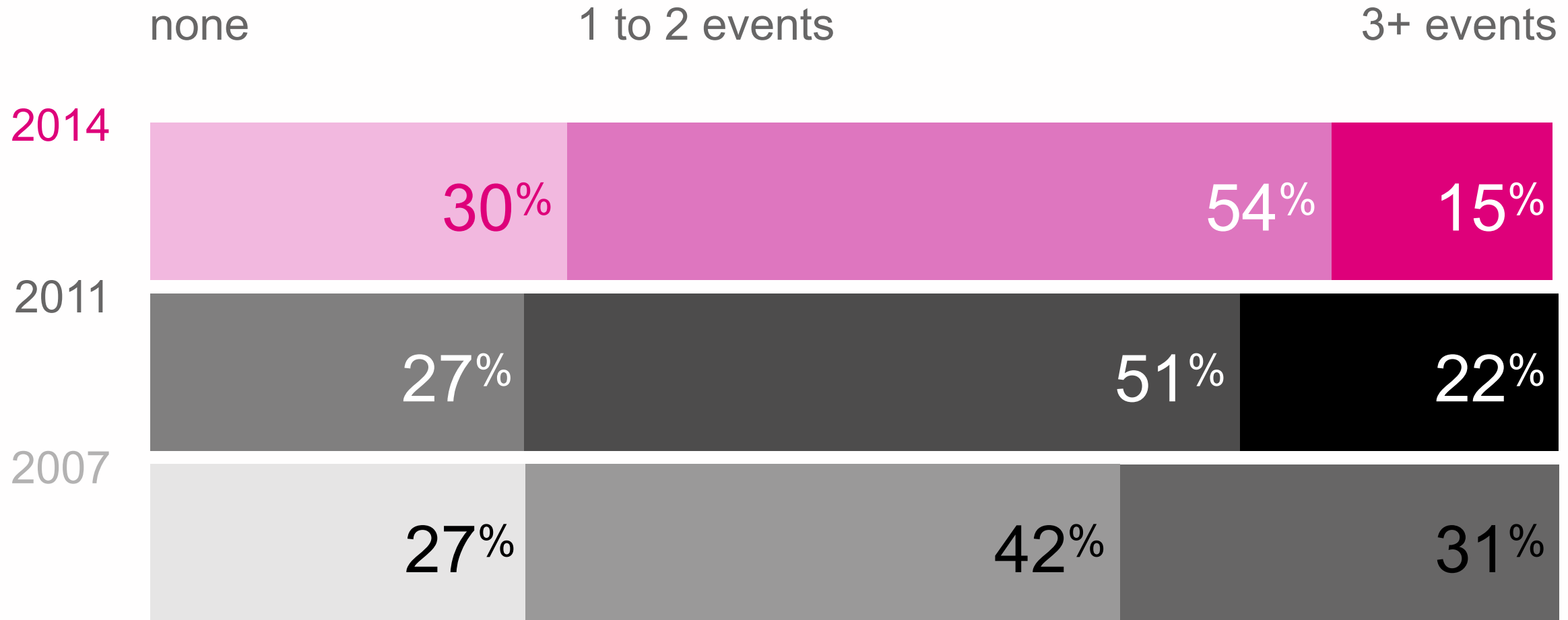


# PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR (DECLINES)



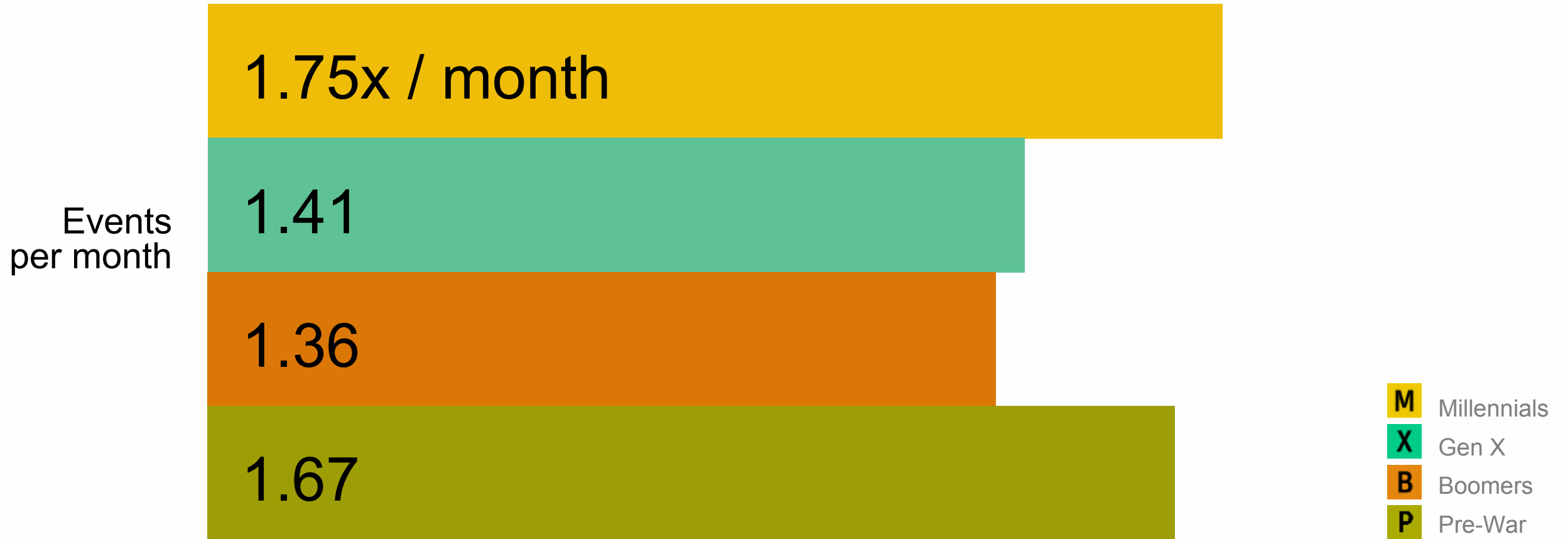
Although audiences are attending a wider variety of activities, frequency is down.

# NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH



The oldest and youngest  
ends of the spectrum  
participate most often.

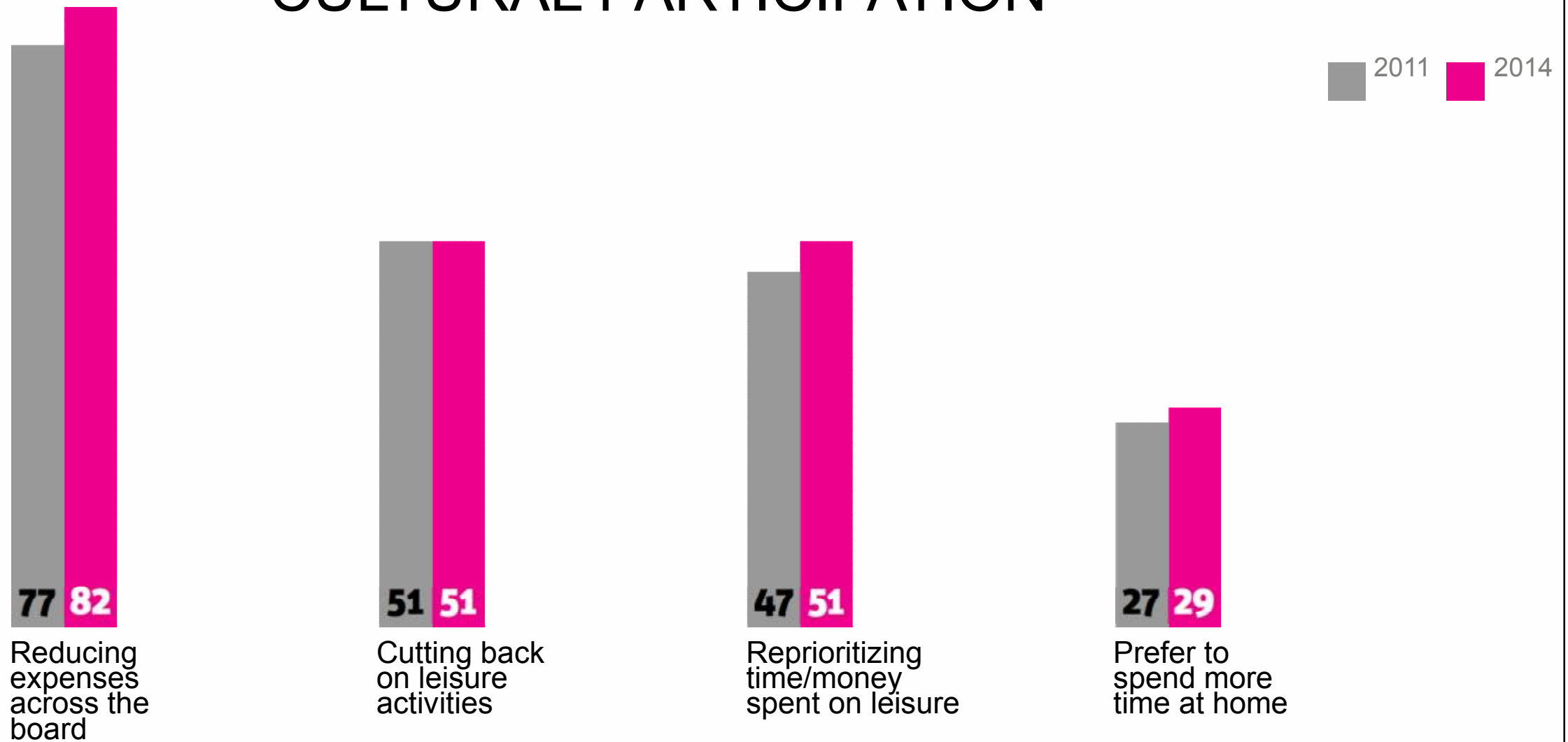
# NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH (BY GENERATION)



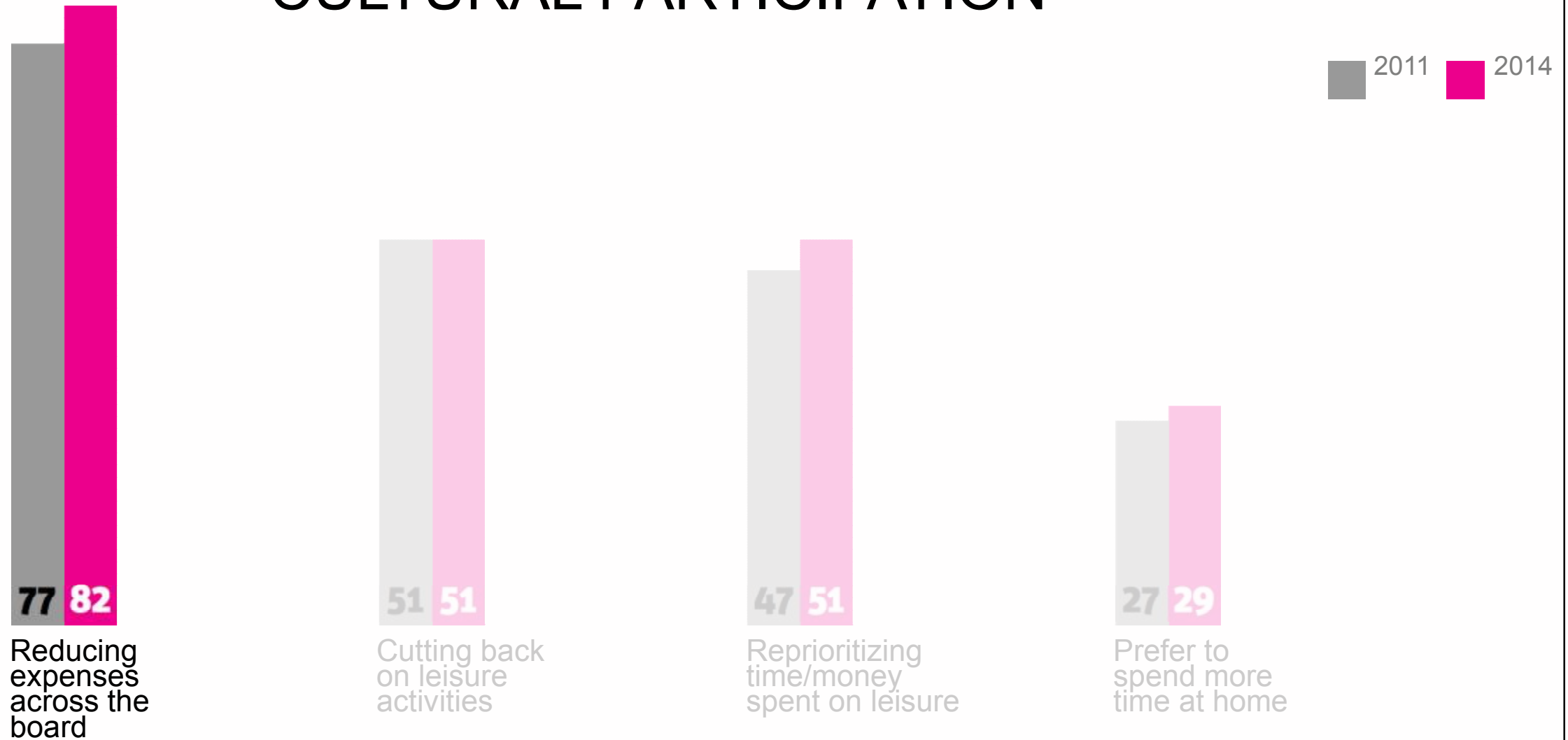


The effect of the economic downturn lingers.

# ECONOMIC REASONS FOR DECREASING CULTURAL PARTICIPATION



# ECONOMIC REASONS FOR DECREASING CULTURAL PARTICIPATION



People now define culture even more broadly than before...

... 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

64%

define as a cultural activity

60%

participate at least once per year



Photo by Joel Johnson

street art

food and drink experiences

64%

define as a  
cultural activity

73%

participate at least  
once per year



Photo by Brendan C

MASTERPIECE™



51%

define as a  
cultural activity

84%

participate at least  
once per year

non-commercial television

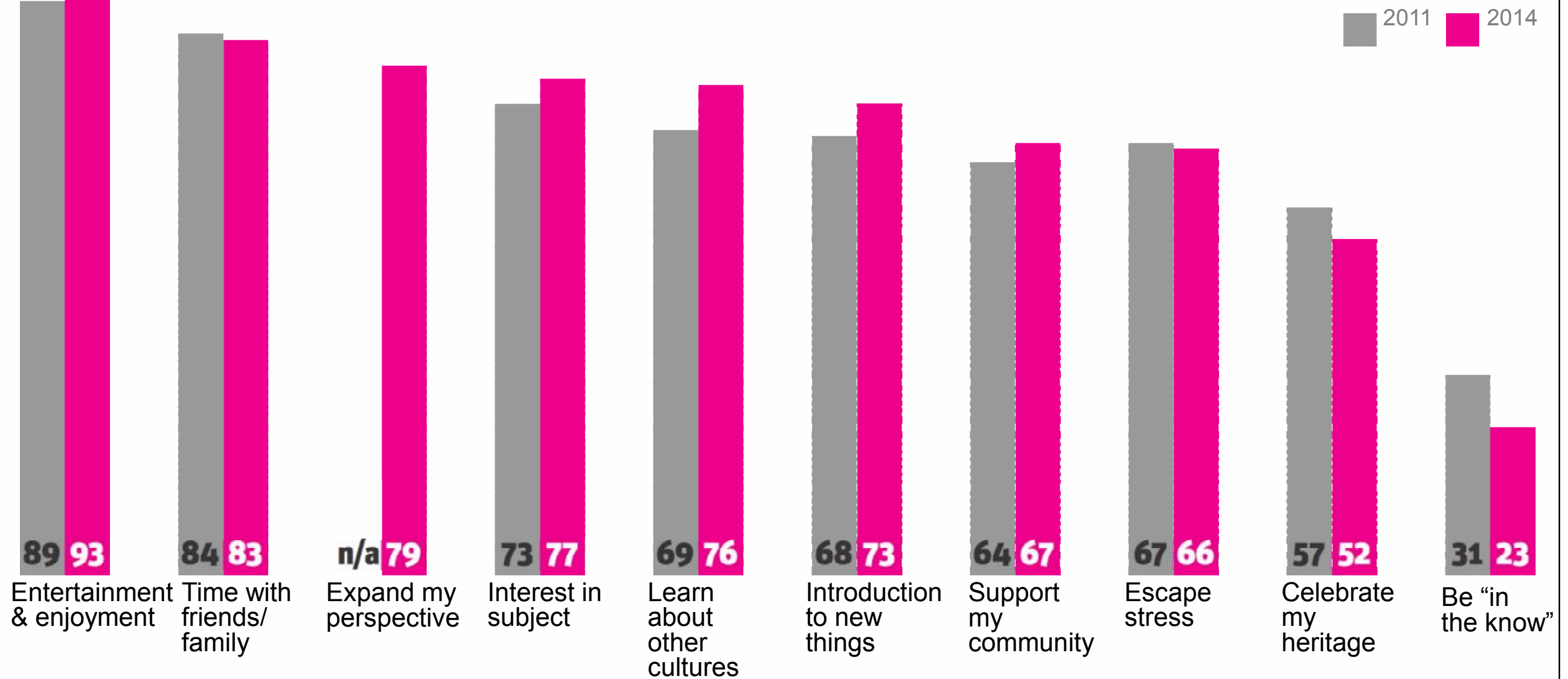


# Motivators & Barriers

Cultural audiences are  
seeking both  
entertainment  
and enlightenment ...

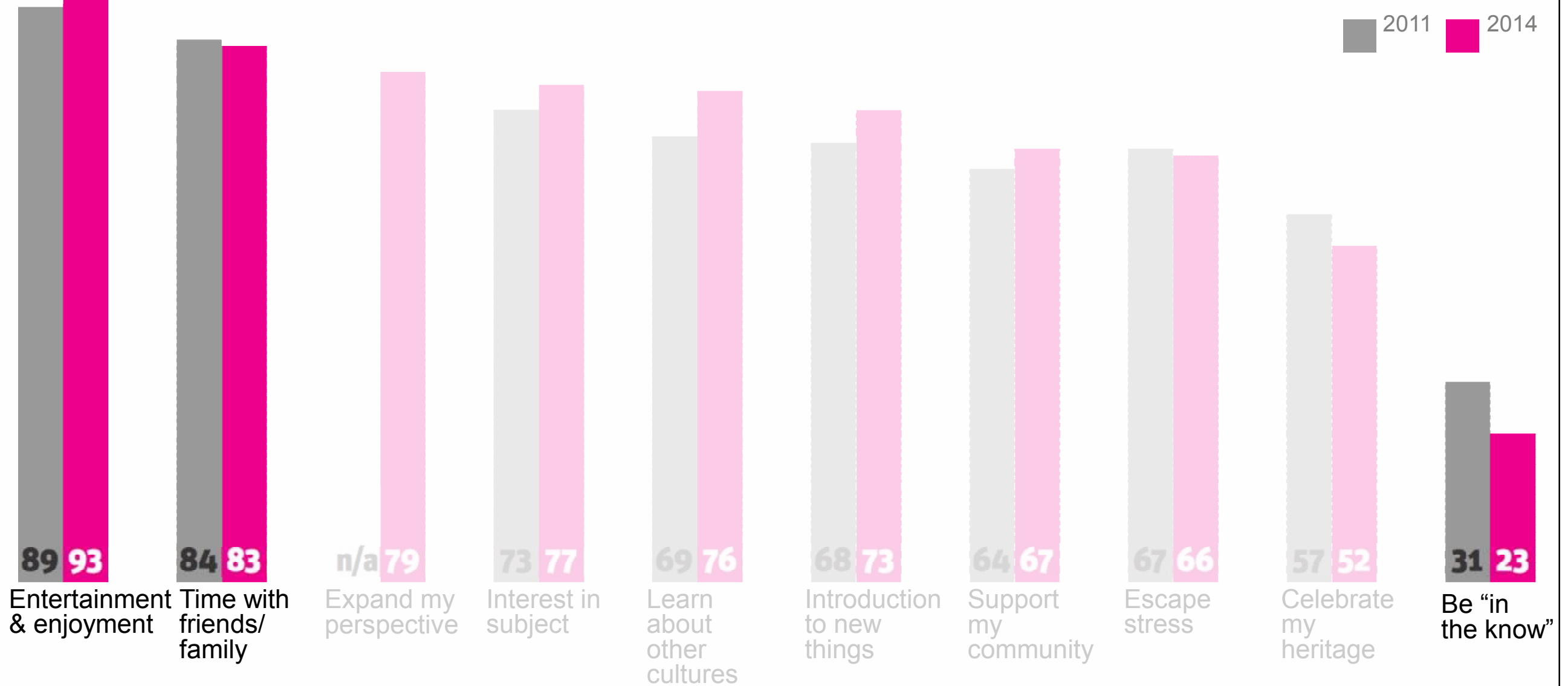
... and it's less about being  
“in-the-know” than it is about  
being with who you know.

# REASONS TO MAKE CULTURE A PART OF ONE'S LIFE



# REASONS TO MAKE CULTURE A PART OF ONE'S LIFE

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)

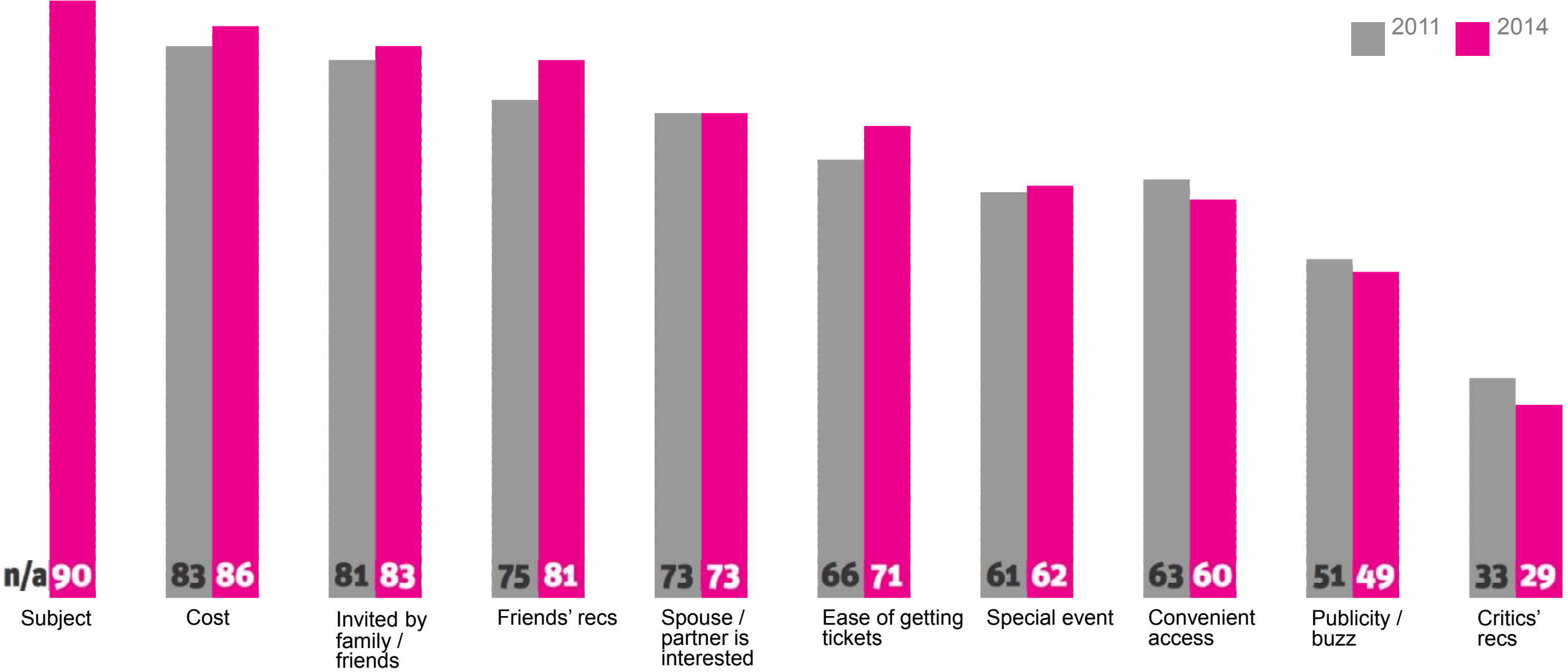


# What drives participation?

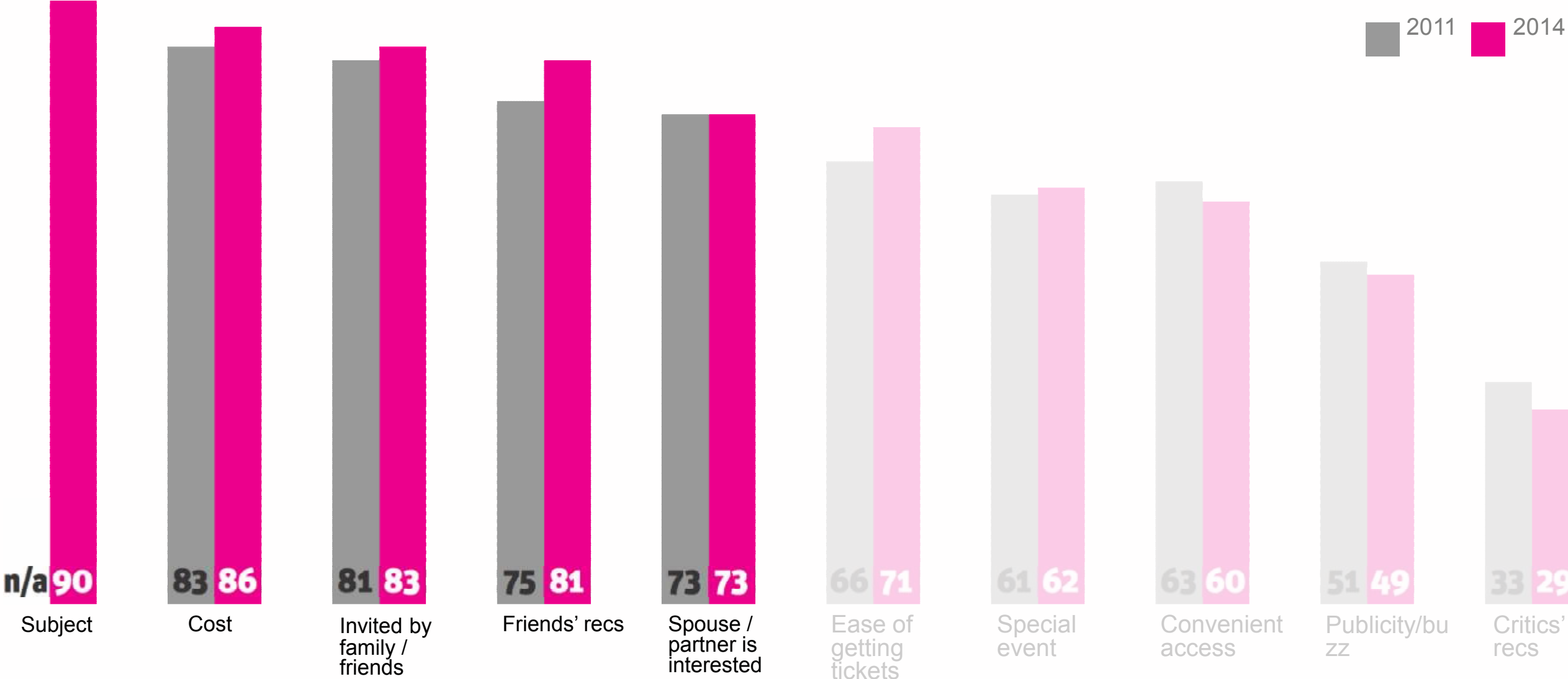
Content, value, and  
being social.



# MOTIVATORS FOR ATTENDING CULTURAL ACTIVITIES



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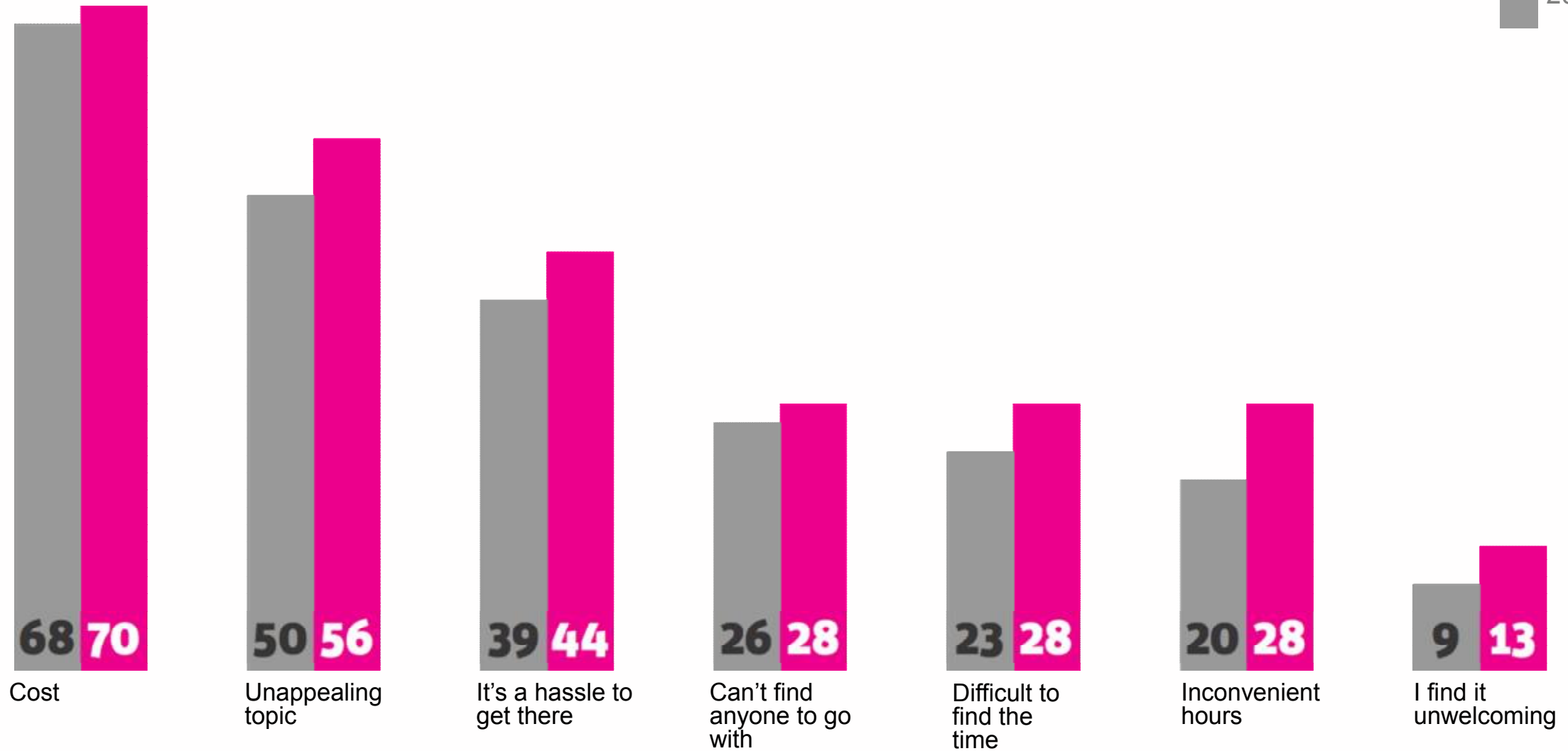


# What are the big barriers?

Cost, content and  
(in)convenience.

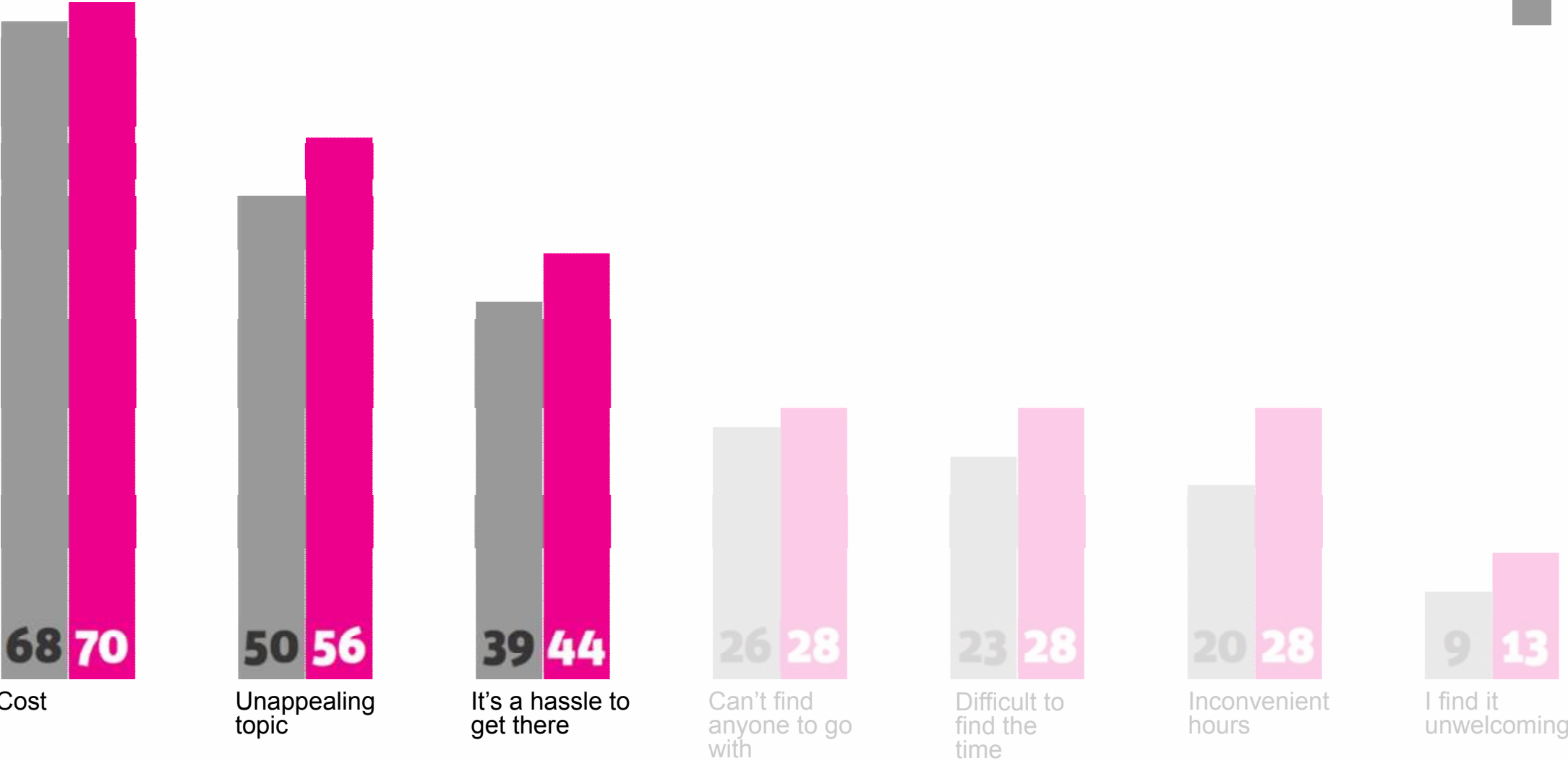
# BARRIERS TO ATTENDING CULTURAL ACTIVITIES

2011 2014



# BARRIERS TO ATTENDING CULTURAL ACTIVITIES

2011 2014





## KEY INSIGHT: BARRIERS (1)

Traveling in packs:  
Almost 1/2 of  
**M**illennials won't  
attend if it means  
going alone.

# BARRIERS TO CULTURAL PARTICIPATION (BY GENERATION)





## KEY INSIGHT: BARRIERS (2)

Not for me:  
Over 3/4 of **P**re-  
Wars stay away if  
they feel the  
programming is not  
for them.



# BARRIERS TO CULTURAL PARTICIPATION (BY GENERATION)



# Audience Loyalty

Loyalty continues to decline.

## VISUAL ARTS



% with Memberships

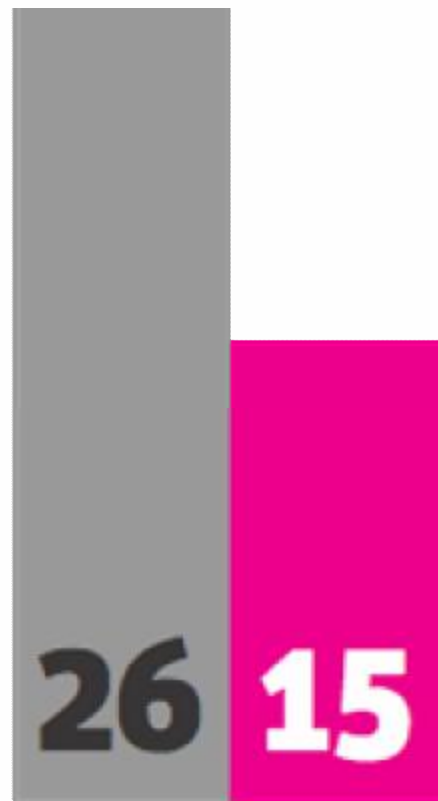
## PERFORMING ARTS



% with Subscriptions

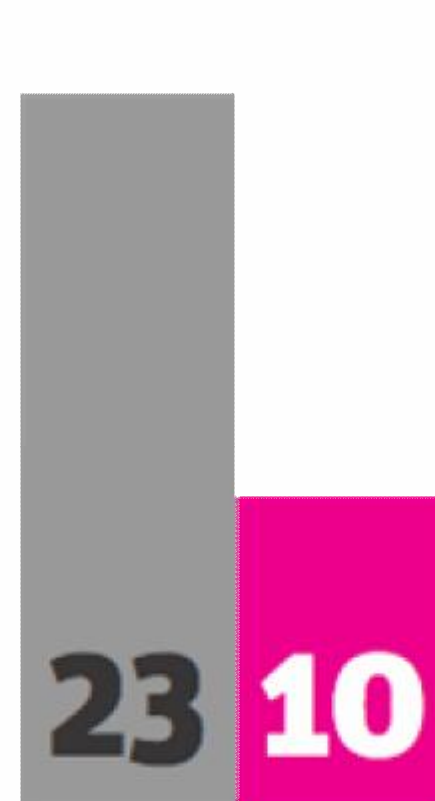
2011

## VISUAL ARTS



% with Memberships

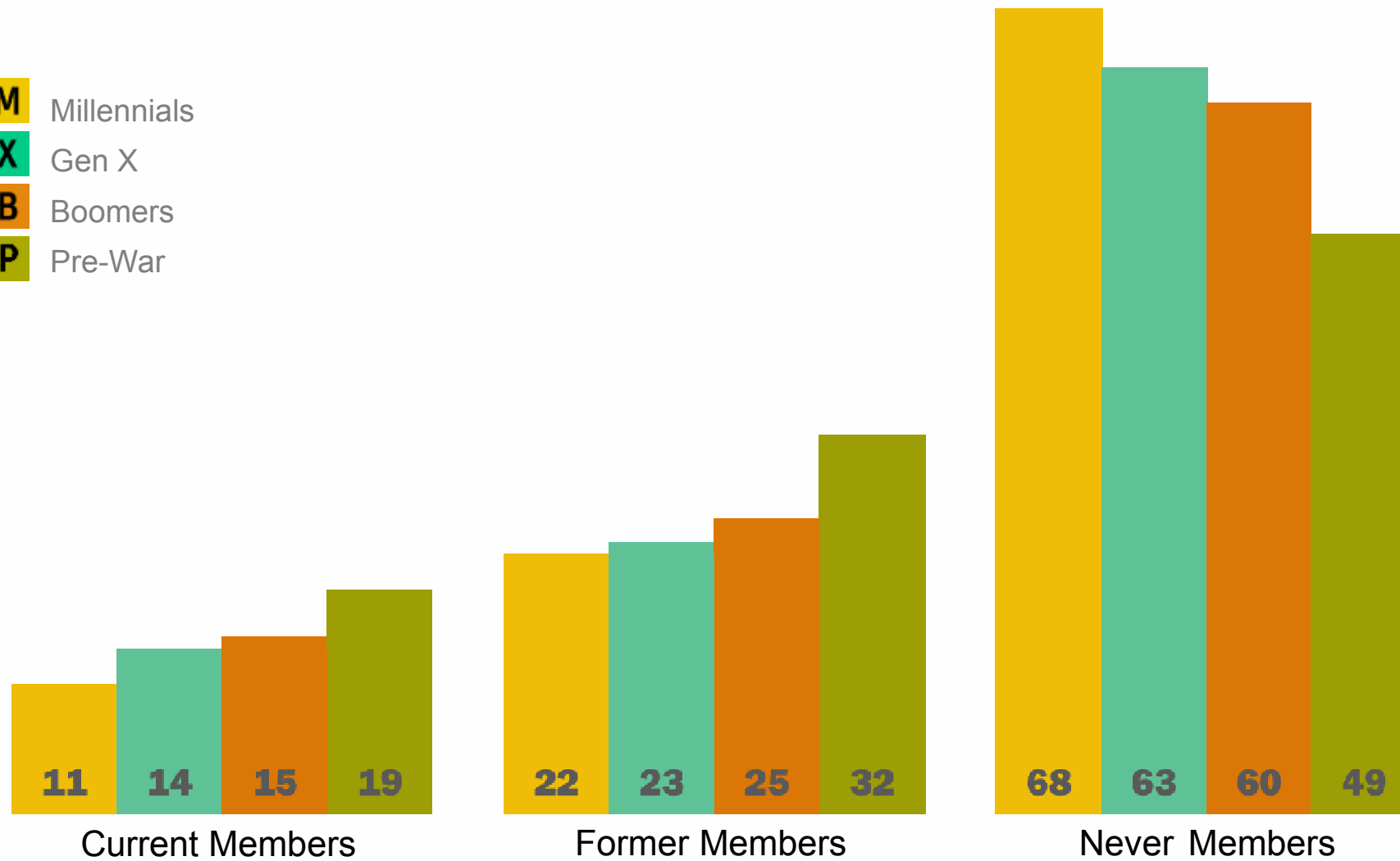
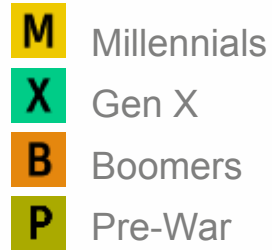
## PERFORMING ARTS



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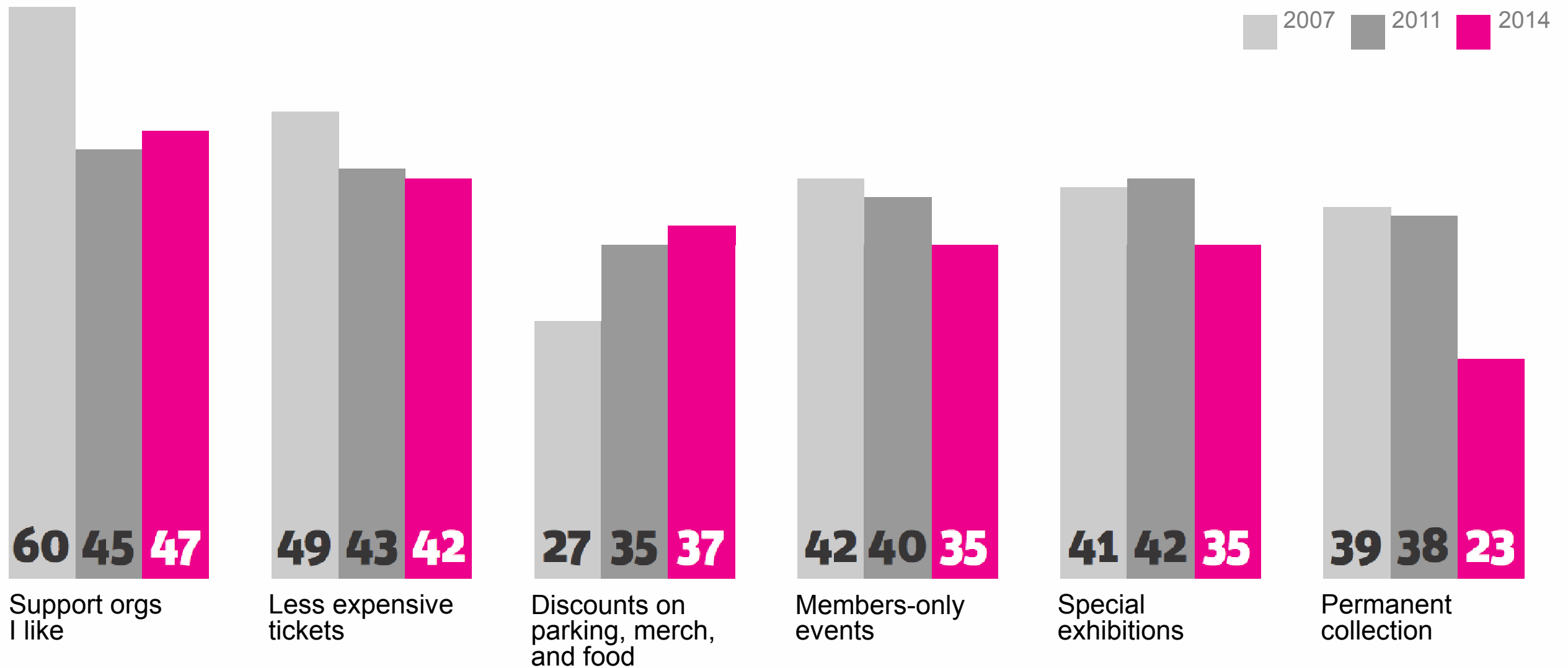


# 2014 VISUAL ARTS MEMBERSHIP (BY GENERATION)



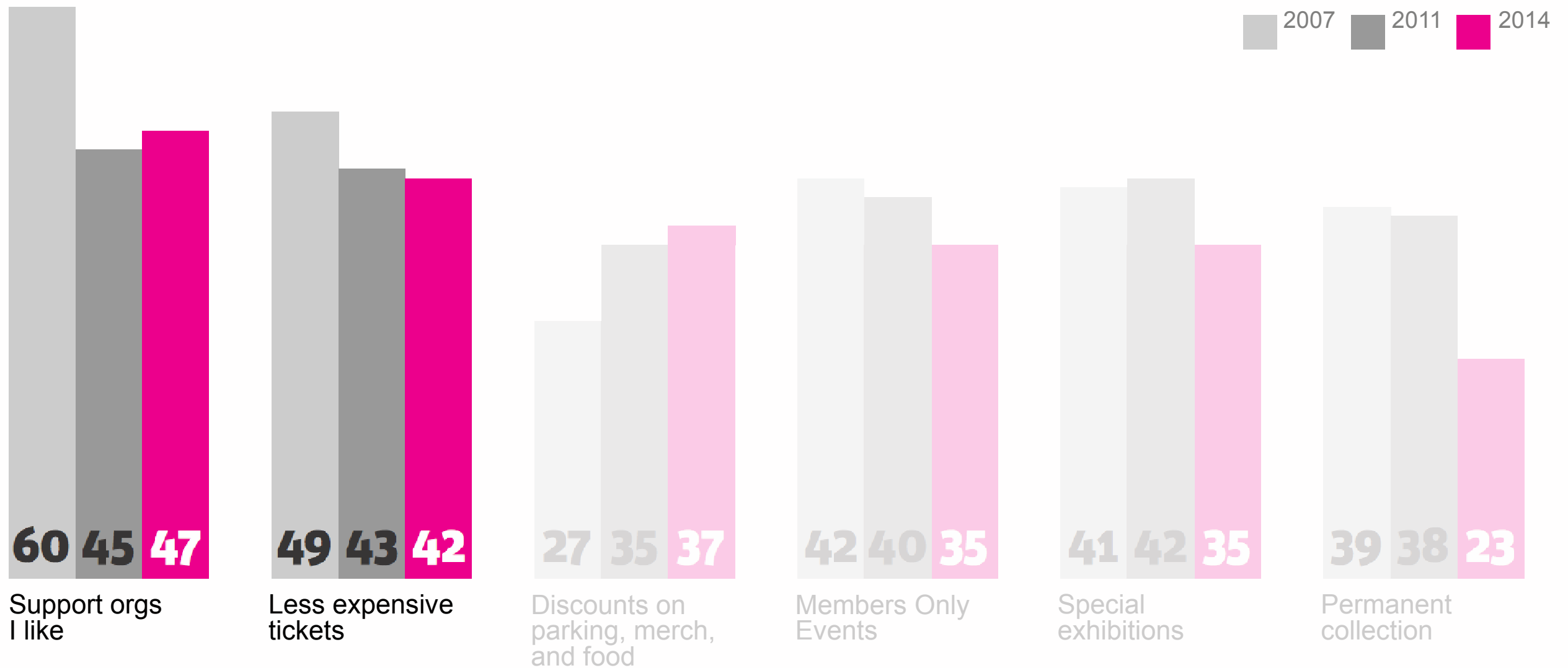
For visual arts membership, affinity and value matter most.

# MOTIVATIONS TO PURCHASE VISUAL ARTS MEMBERSHIPS

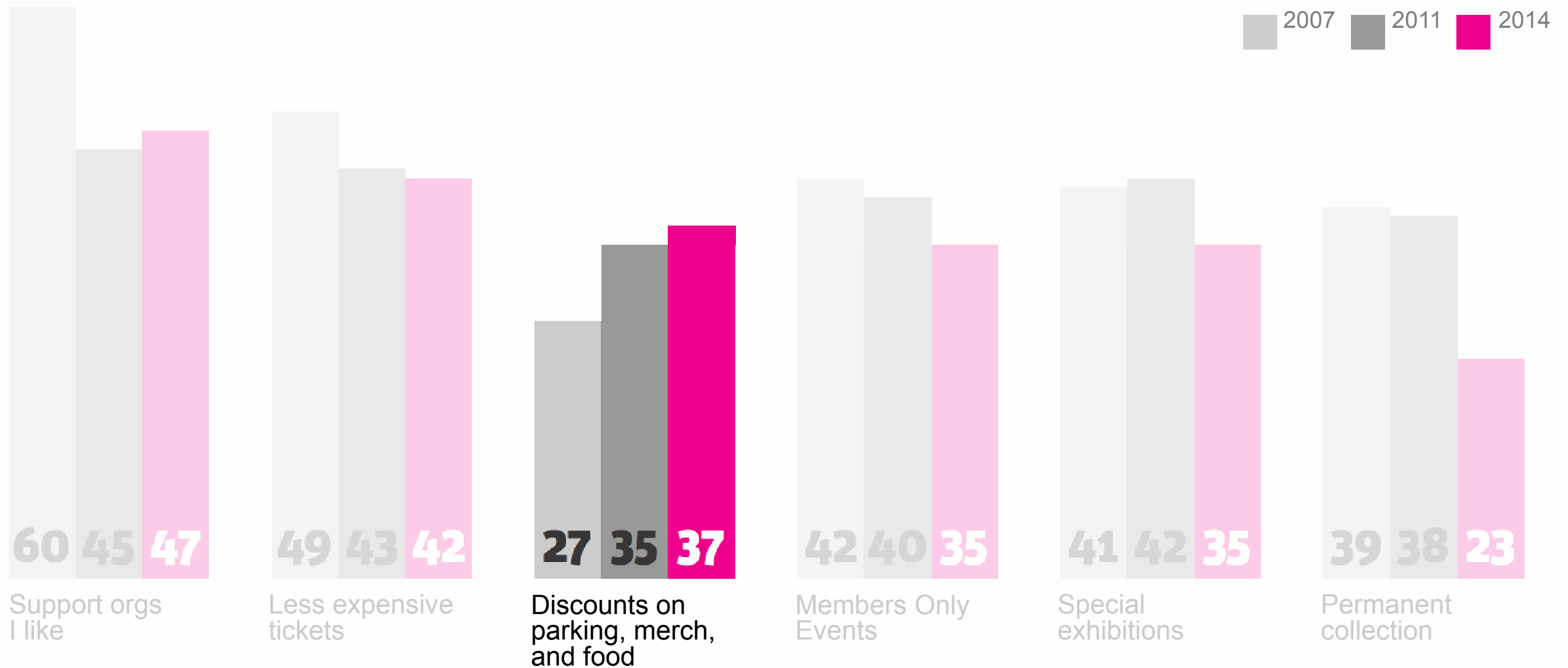




# MOTIVATIONS TO PURCHASE VISUAL ARTS MEMBERSHIPS



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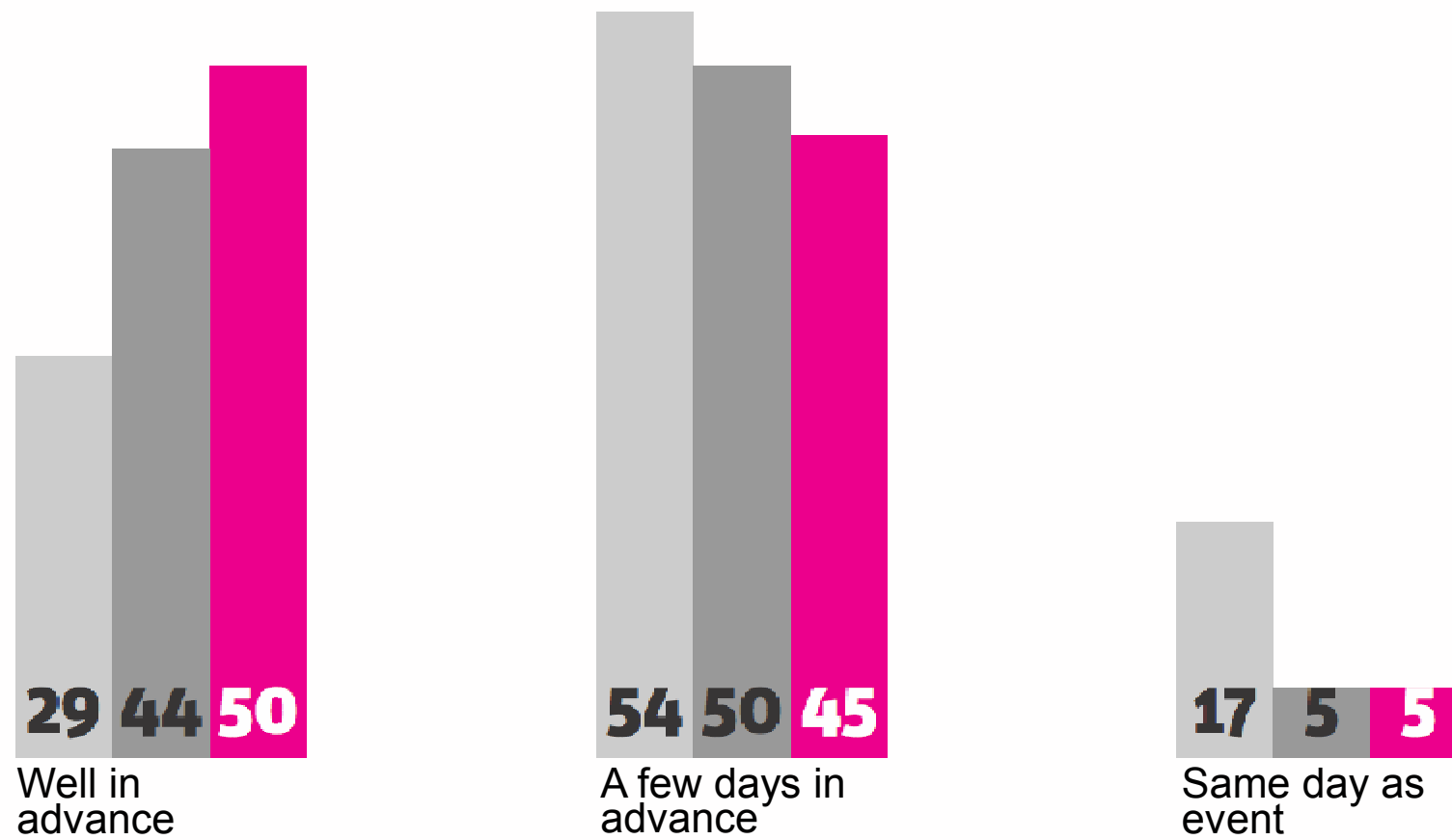


# Advance Planning

Advance planning  
continues to be on the rise  
for the visual arts ...

# VISUAL ARTS ATTENDANCE PLANNING

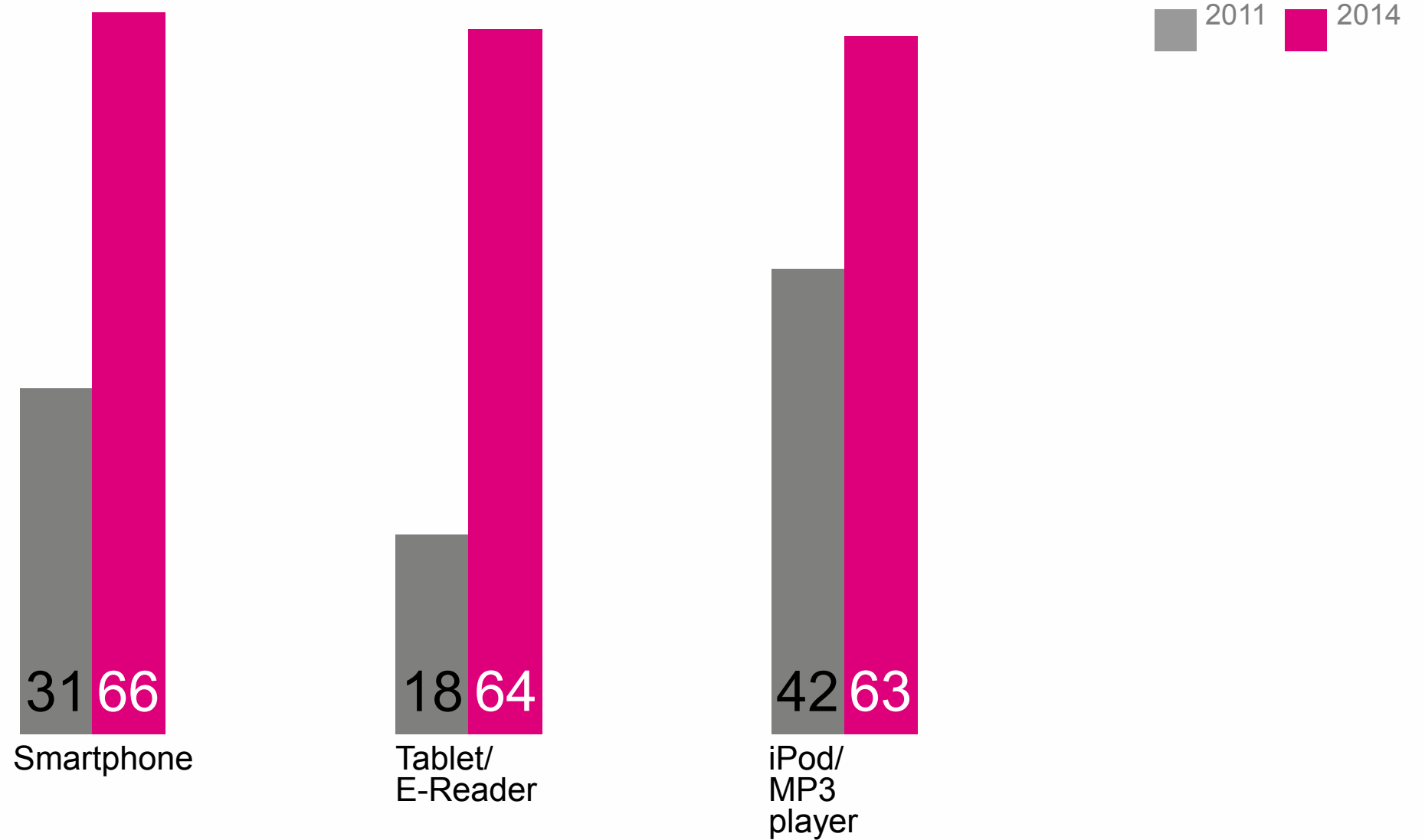
2007 2011 2014



# Technology & On-Site Experience

Mobile device ownership  
has skyrocketed since 2011.

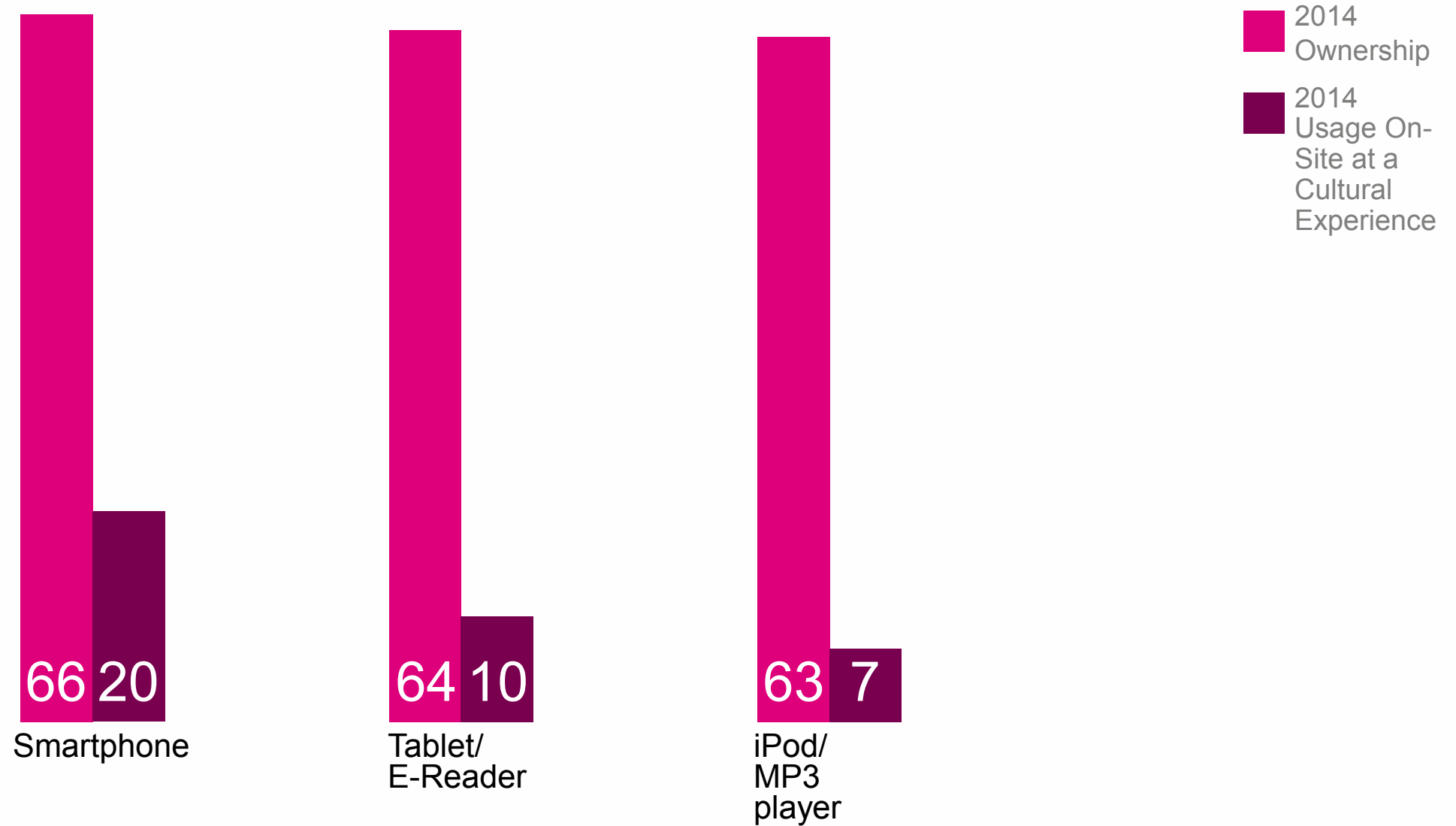
# OWNERSHIP OF MOBILE DEVICES





Yet, few are using mobile devices to enhance their cultural experience on-site.

# OWNERSHIP vs. USAGE OF MOBILE DEVICES ON-SITE



This is a transitional  
moment for using  
technology in cultural  
experiences ...

... and the audience is leading the way in defining the new norms.

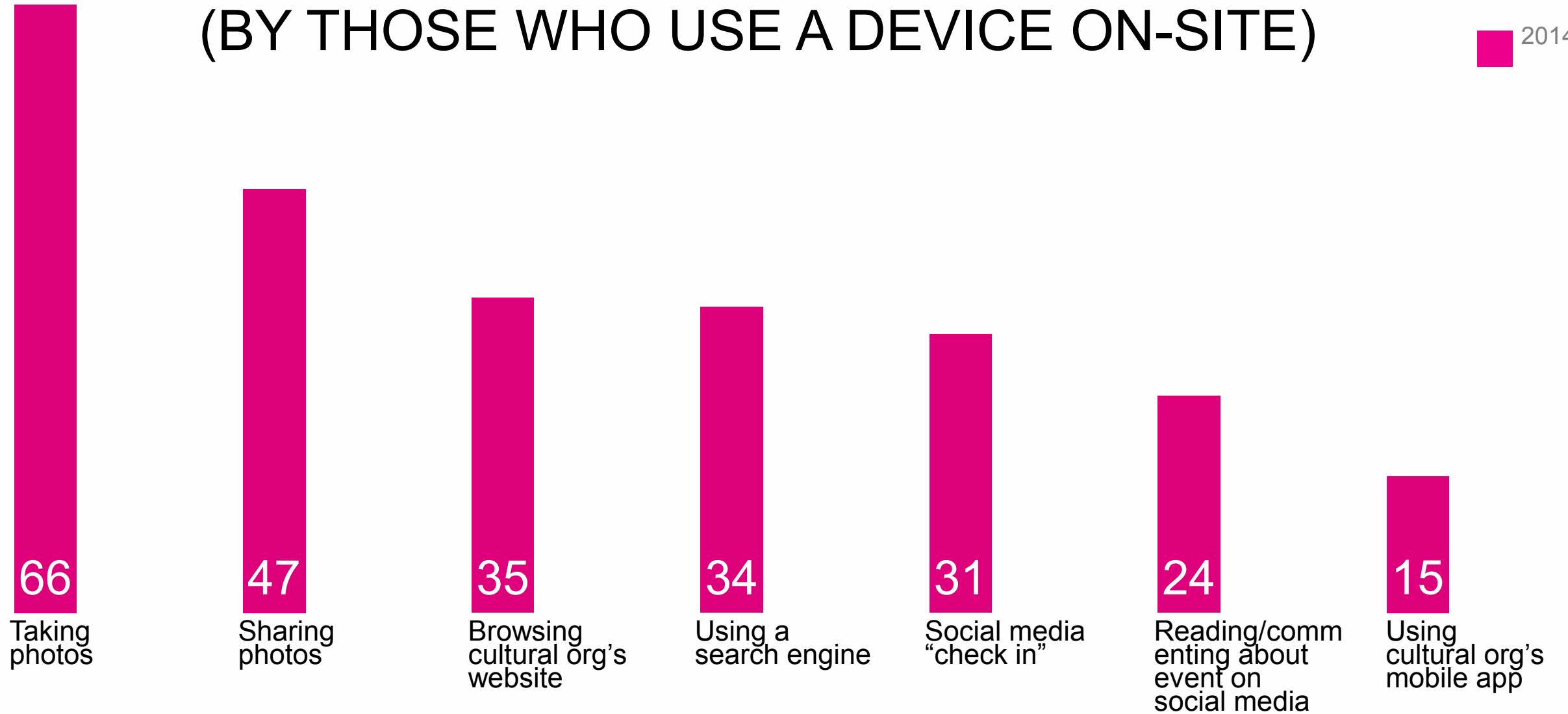


**KEY INSIGHT:**  
**TECH USE ON-SITE**

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

# MOBILE DEVICE ACTIVITIES (BY THOSE WHO USE A DEVICE ON-SITE)

2014



What it means

Today's audiences are  
anything but passive.



The good news is that they are open-minded and actively seeking new experiences.

The bad news is that they are more restless and less loyal than ever.

To create the cultural  
experience of the future, **meet**  
**audiences where they live**  
**and understand how they**  
**feel.**

curious

plugged-in

social

heat seeking

born branded



up for anything

discerning

What's a cultural  
organization to do?

Listen to what  
audiences have to say.

So we asked:

What's a cultural  
experience to you?

**“Something that entertains,  
enriches, challenges the  
mind, and gives enjoyment.”**

**“Having ‘aha’ moments.”**

“Something that offers enrichment via sight, sound, touch or taste.”



**“An experience that enlightens and enlarges your world.”**

“Something that takes you above your everyday life – it raises your awareness and uplifts you.”

what do you think?

@laplacacohen

#culturetrack

Download Culture Track at:

[LaPlacaCohen.com/culturetrack](http://LaPlacaCohen.com/culturetrack)

# Panel Discussion

Ruth White; *Thanksgiving Point Institute (Lehi, UT)*

Lisa Krassner; *Metropolitan Museum of Art (New York, NY)*

Carl Hamm; *Saint Louis Art Museum (St. Louis, MO)*

Lori Bockstanz; *Lady Bird Johnson Wildflower Center (Houston, TX)*

