

CULTURE TRACK '14

A version of this document was presented by Arthur Cohen, CEO of LaPlaca Cohen, at the Culture Track 2014 release at The TimesCenter on Monday April 28, 2014.

The following are top-line insights from Culture Track 2014. The comprehensive results from the study (and a video of the presentation) can be downloaded at LaPlacaCohen.com/culturetrack.

Twitter: @LaPlacaCohen #culturetrack

What is Culture Track?

An ongoing study, Culture Track has been fielded six times since 2001.

2001

2003

2005

2008

2011

2014

A national study focused exclusively

on the
Attitudes,
Motivators,
and Barriers

of
Culturally
active
audiences

Why Culture Track?

Build upon leading research studies



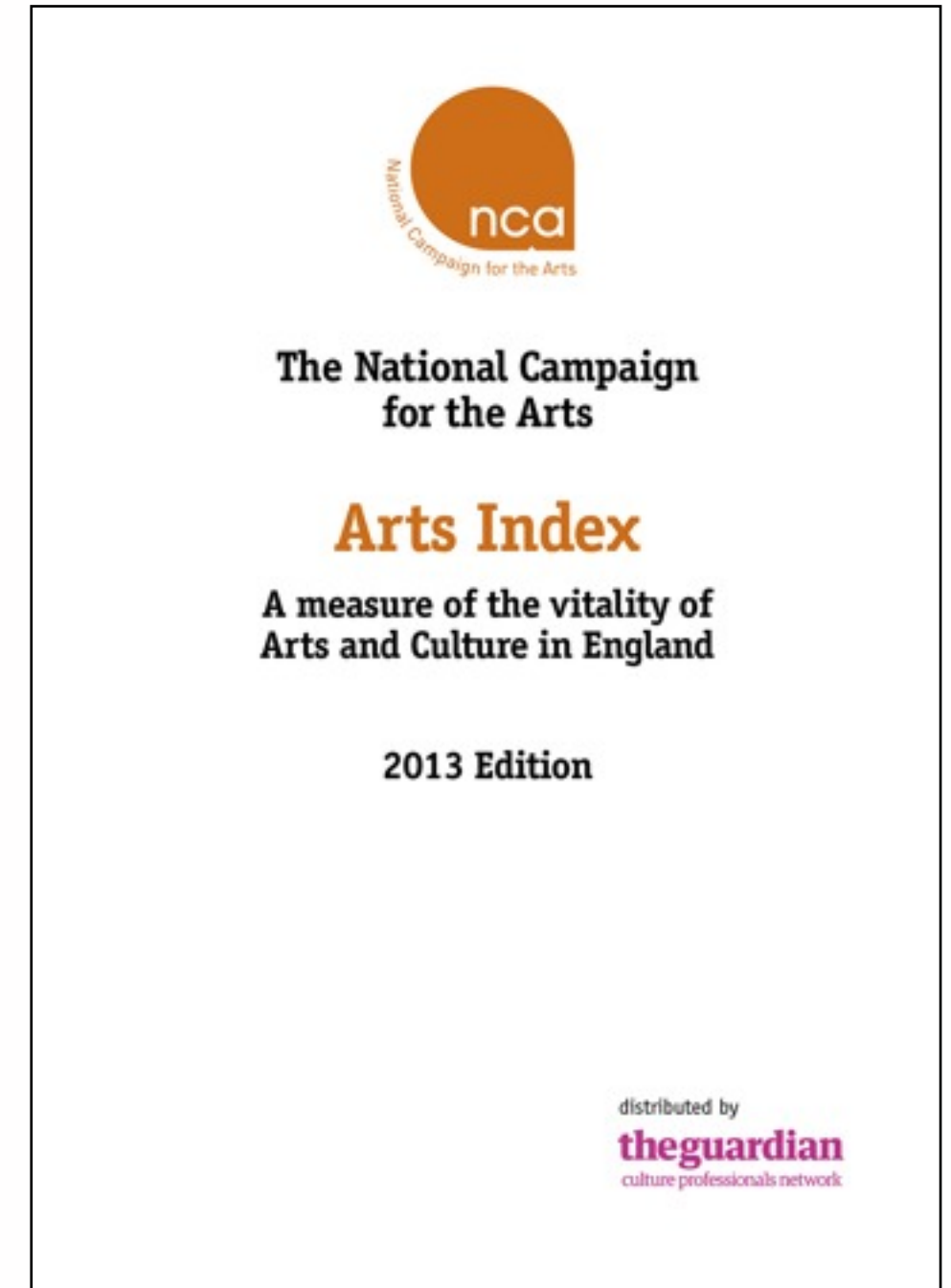
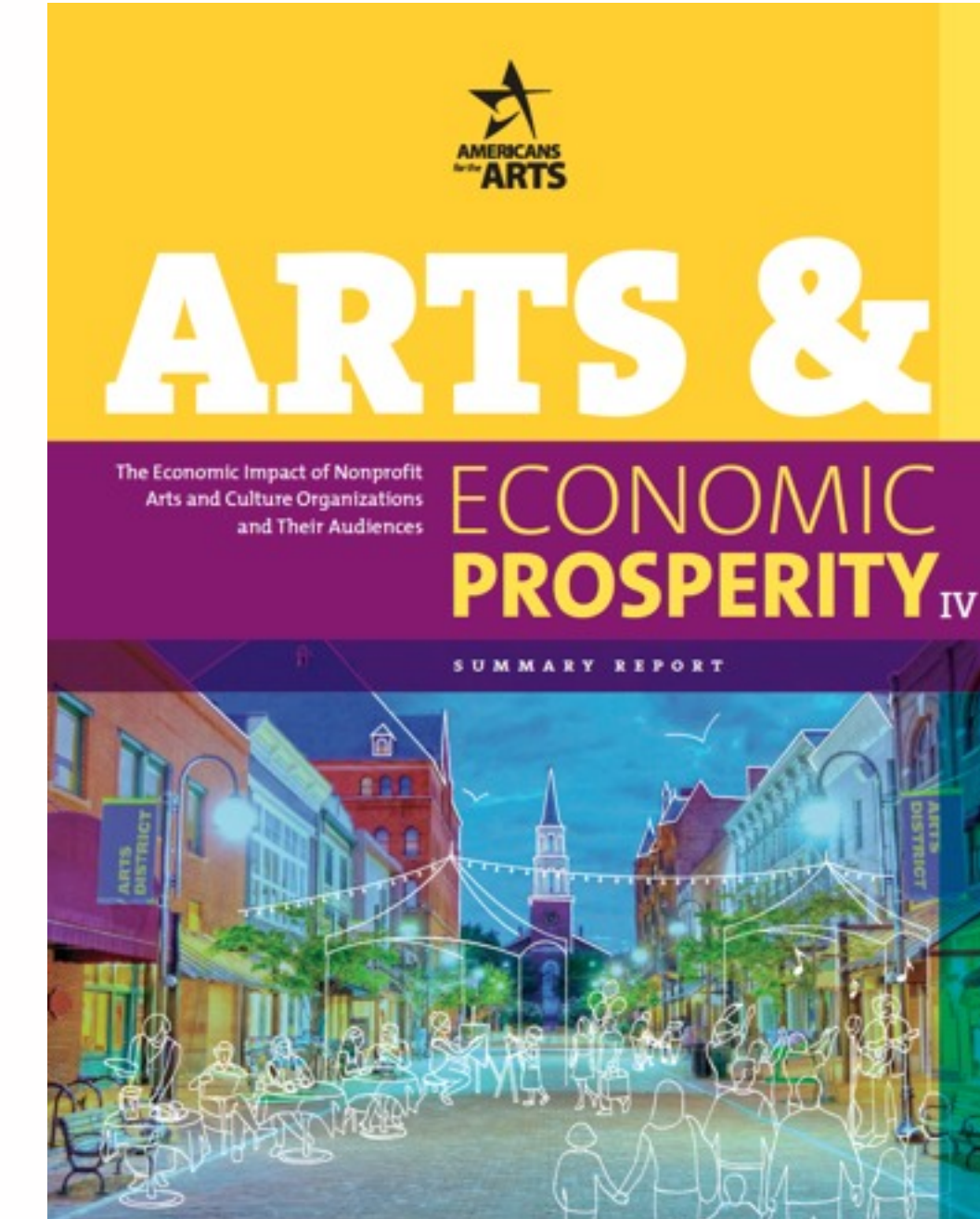
HOW A NATION ENGAGES WITH ART
HIGHLIGHTS FROM THE 2012 SURVEY OF PUBLIC PARTICIPATION IN THE ARTS



NATIONAL ENDOWMENT FOR THE ARTS



TrendsWatch
2014



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 ...

overstimulated

promiscuous

hyper-connected

cynical

overcommitted

self-focused

but curious

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

So Culture Track asked them...

what? how? why?

**First, some
background**

Methodology

A stylized map of the United States in shades of blue, serving as the background for the text.

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+

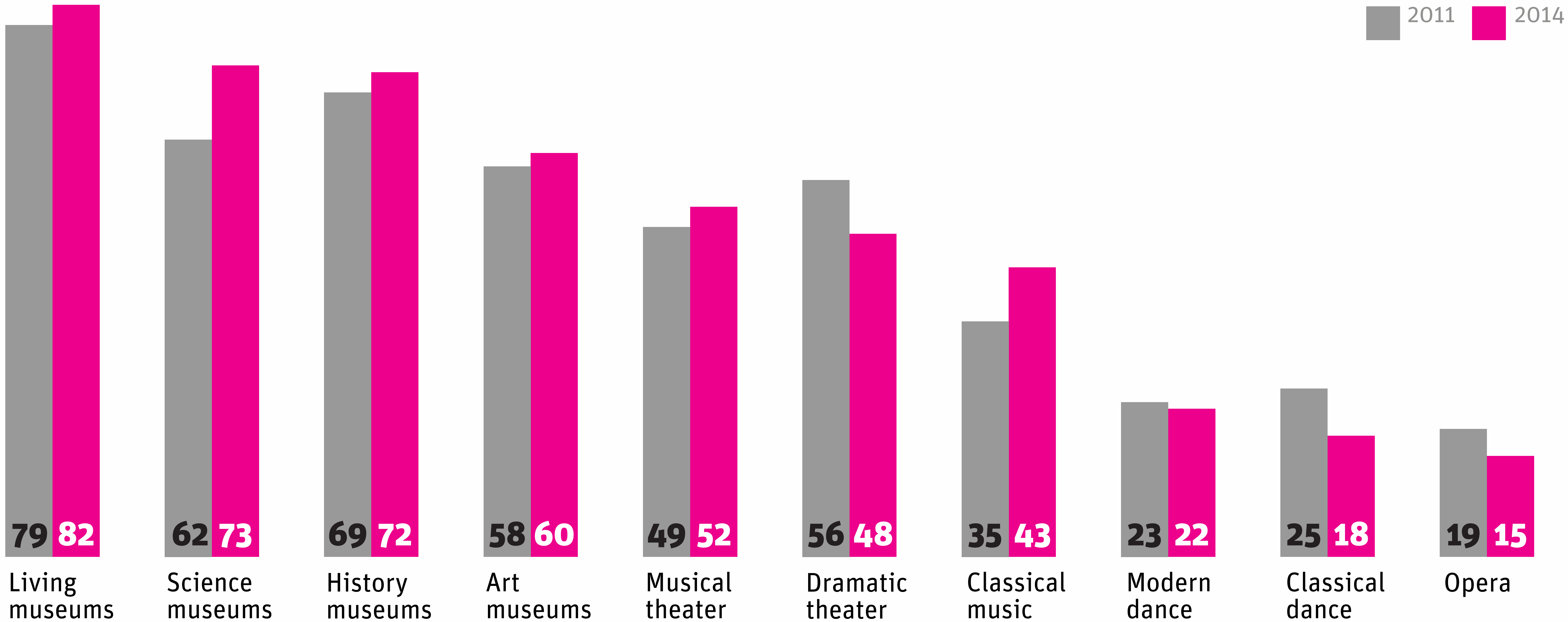
Pre-War

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



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

NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH

none

1 to 2 events

3+ events

2014



2011

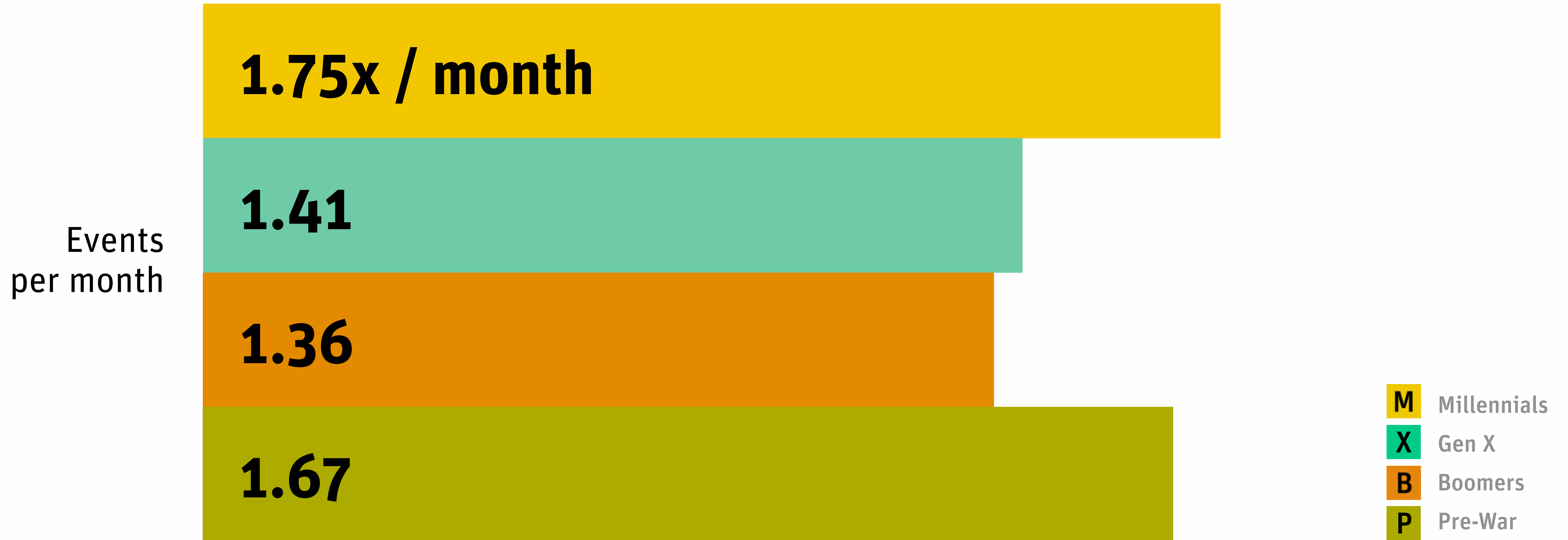


2007



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

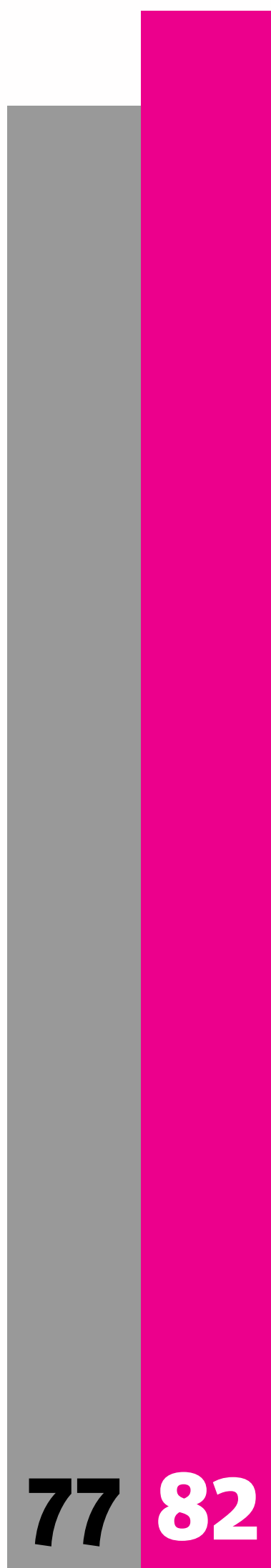
NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH (BY GENERATION)



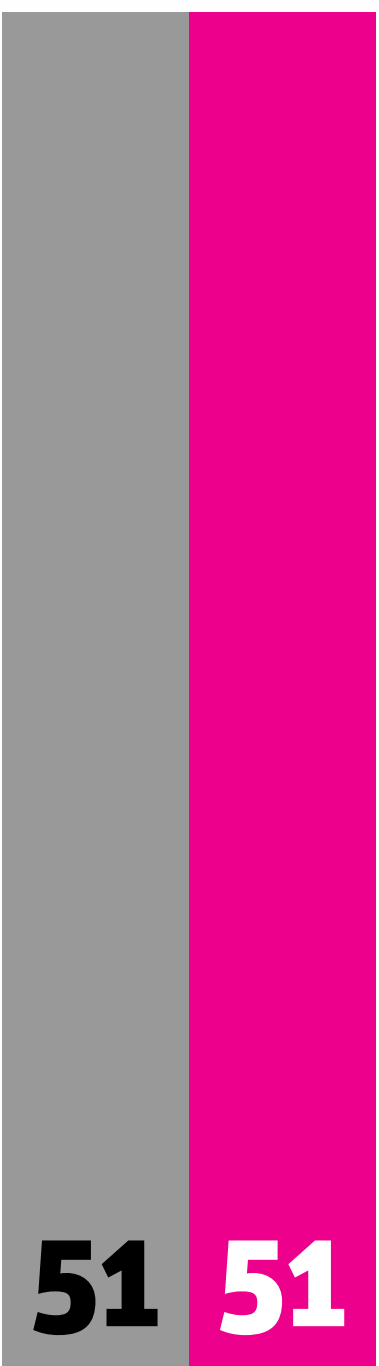
The effect of the economic downturn lingers.

ECONOMIC REASONS FOR DECREASING CULTURAL PARTICIPATION

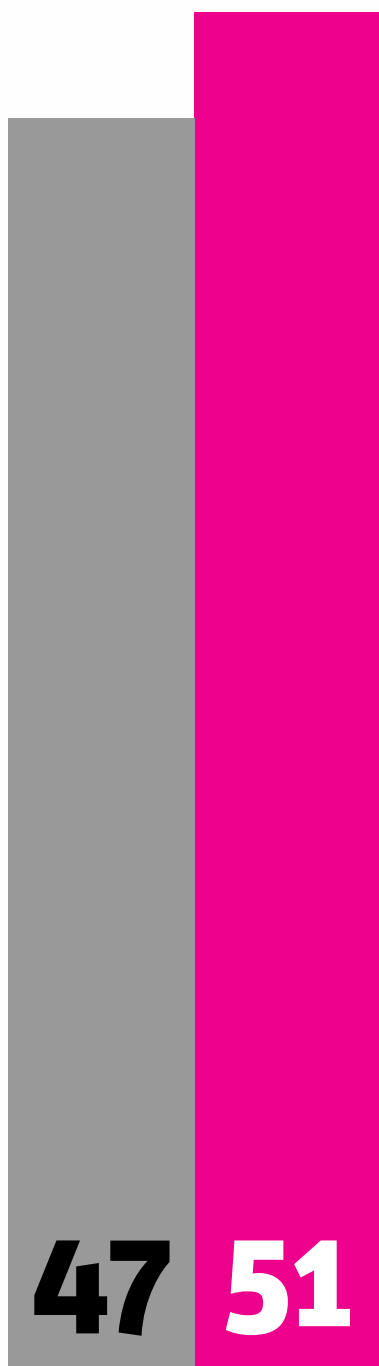
2011 2014



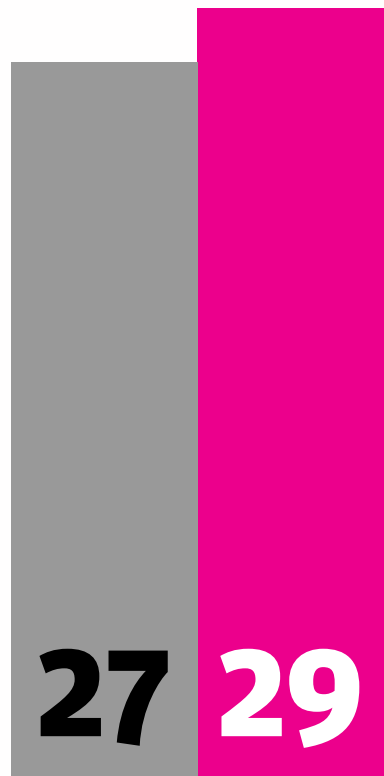
Reducing expenses across the board



Cutting back on leisure activities



Reprioritizing time/money spent on leisure



Prefer to spend more time at home

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

60%

participate at least once per year



Photo by Joel Johnson

food and drink experiences

64%

define as a
cultural activity

73%

participate at least
once per year

Photo by Brendan C

41%

define as a
cultural activity

38%

participate at least
once per year



Photo by Kris Krüg

a live or recorded lecture online

an independent film at a theater

MANAKAMANA
HATESHIP LOVESHIP
ERNEST & CELESTINE
NYICFF / FRENCH MINISTER

IFC CENTER

56%

define as a
cultural activity

52%

participate at least
once per year

MASTERPIECETM



non-commercial television

51%

define as a
cultural activity

84%

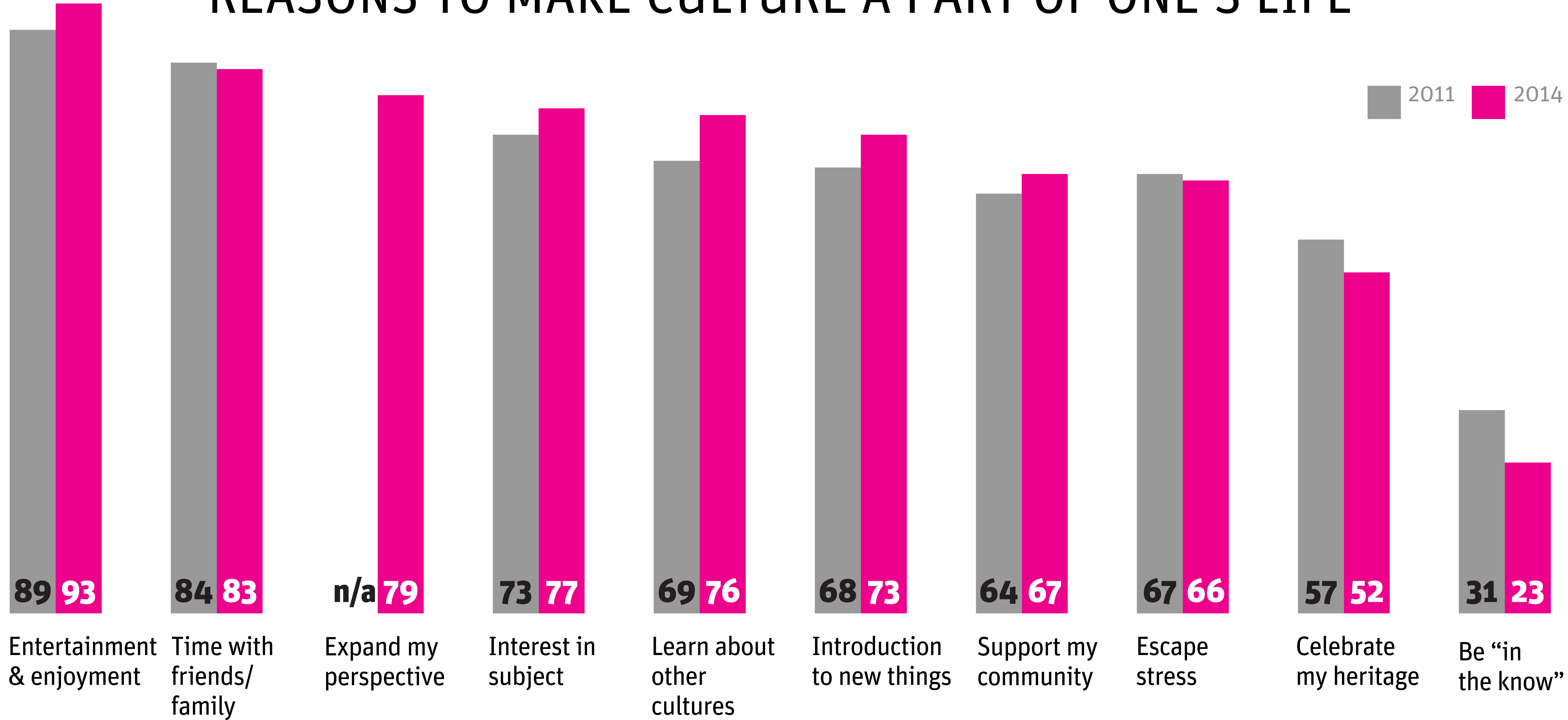
participate at least
once per year

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



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)

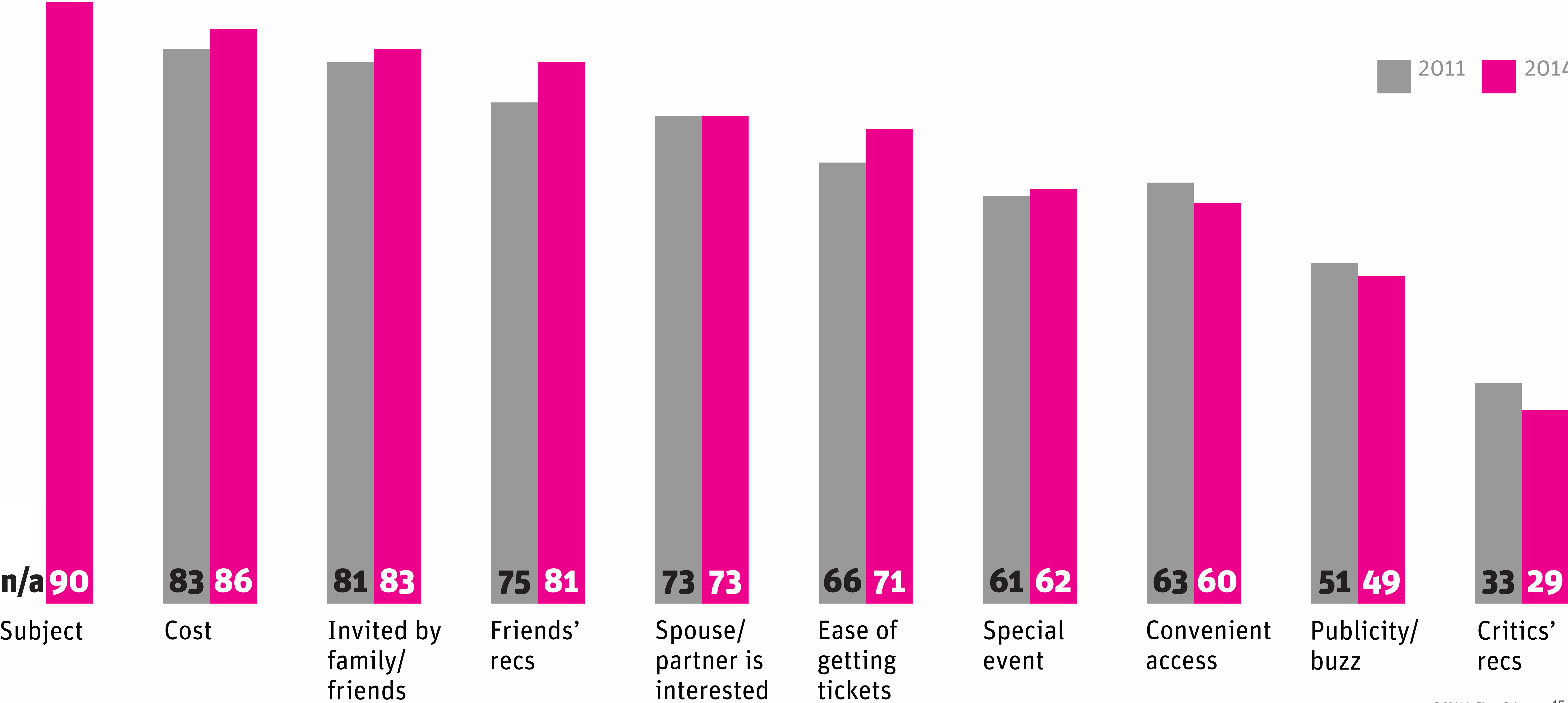


What drives participation?

Content, value, and
being social.

MOTIVATORS FOR ATTENDING CULTURAL ACTIVITIES

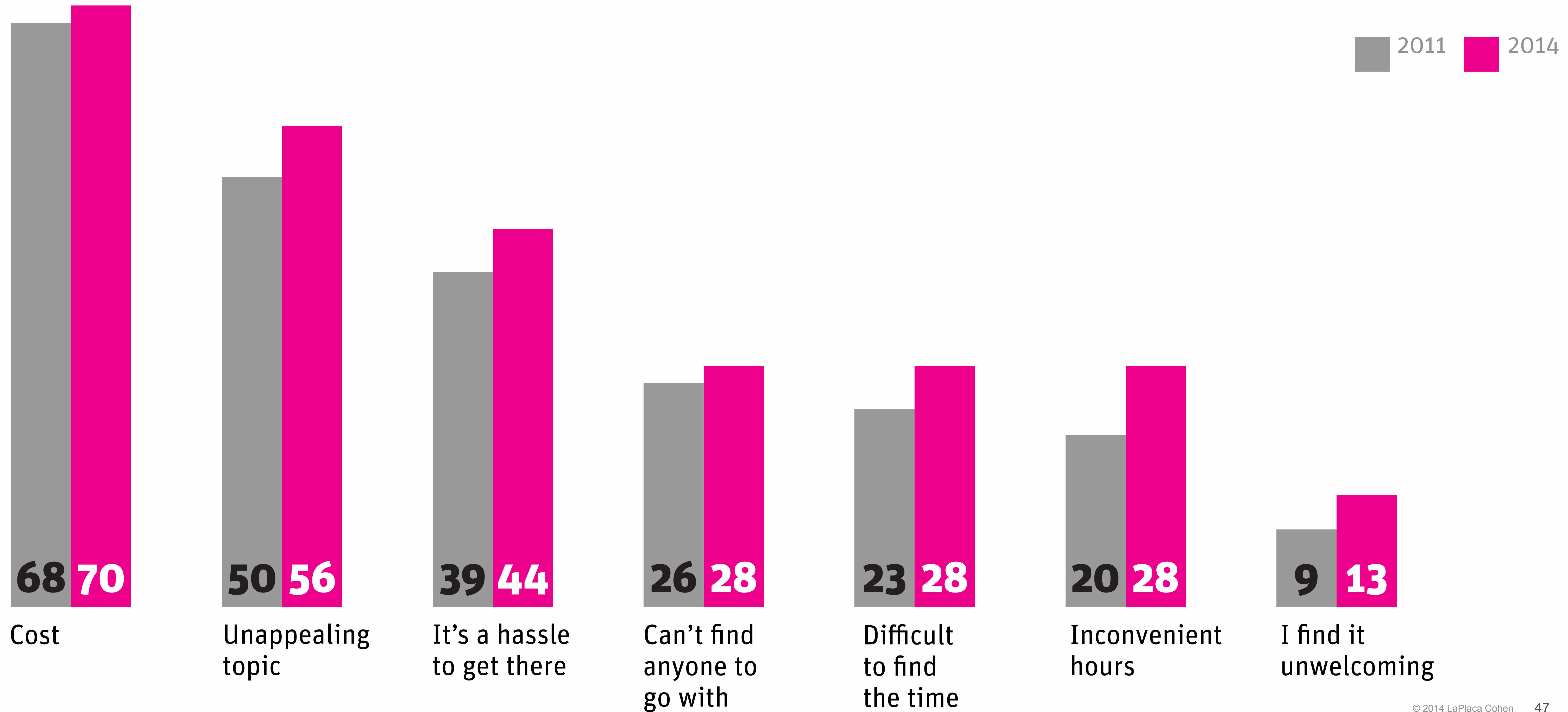
2011 2014



What are the big barriers?

Cost, content and
(in)convenience.

BARRIERS TO ATTENDING CULTURAL ACTIVITIES





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)





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)

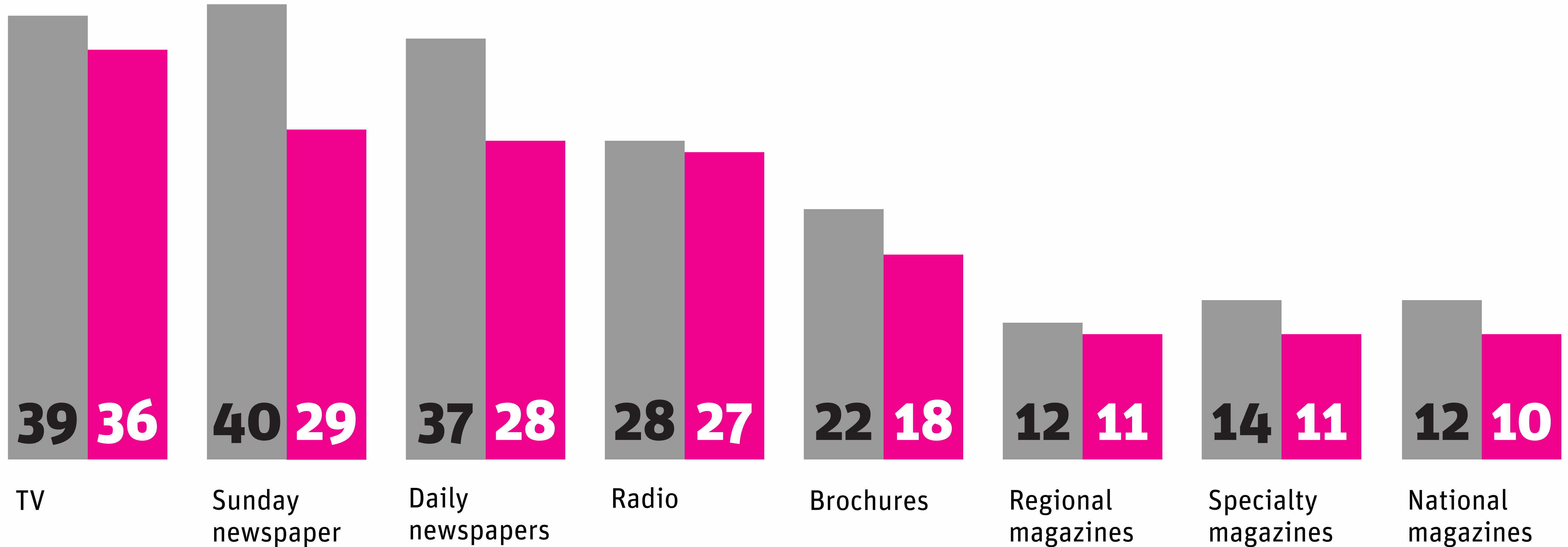


Information Sources

To learn what's going on
culturally, broadcast and
print still matter ...

PRINT & BROADCAST INFORMATION SOURCES FOR CULTURAL ACTIVITIES (USED OFTEN)

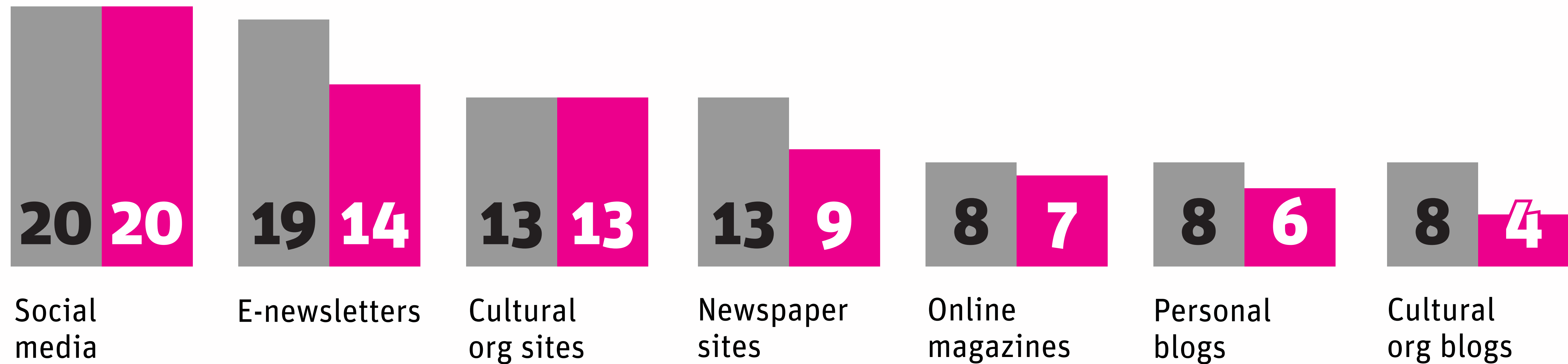
2011 2014



... as do online sources,
which are still catching up.

ONLINE INFORMATION SOURCES FOR CULTURAL ACTIVITIES (USED OFTEN)

2011 2014

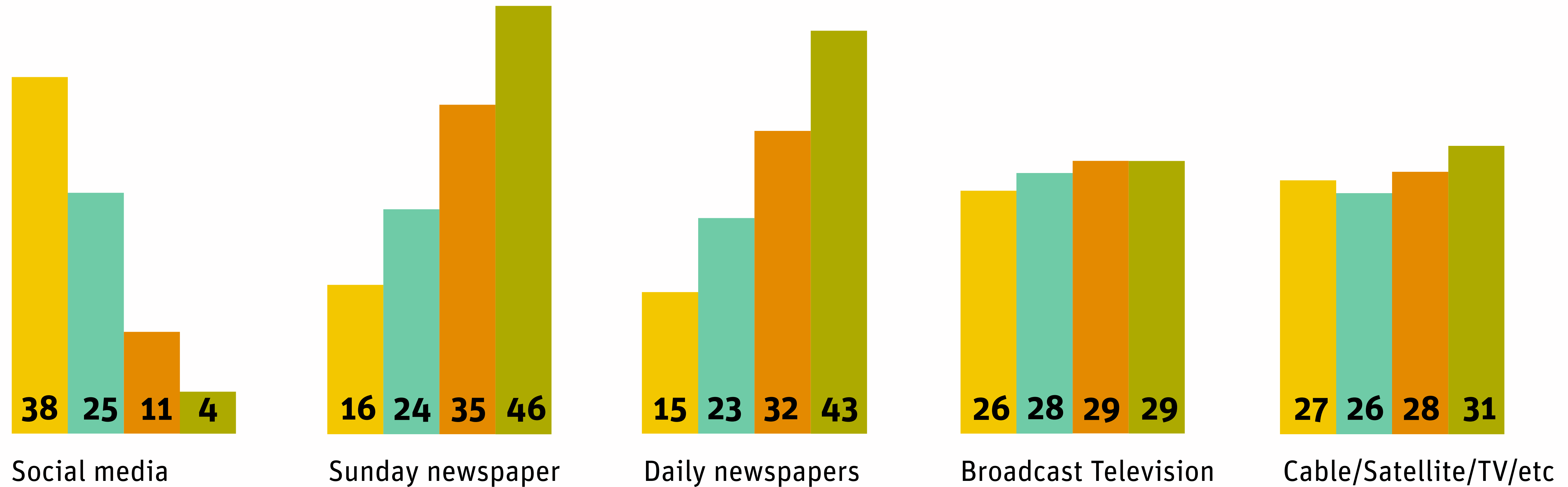
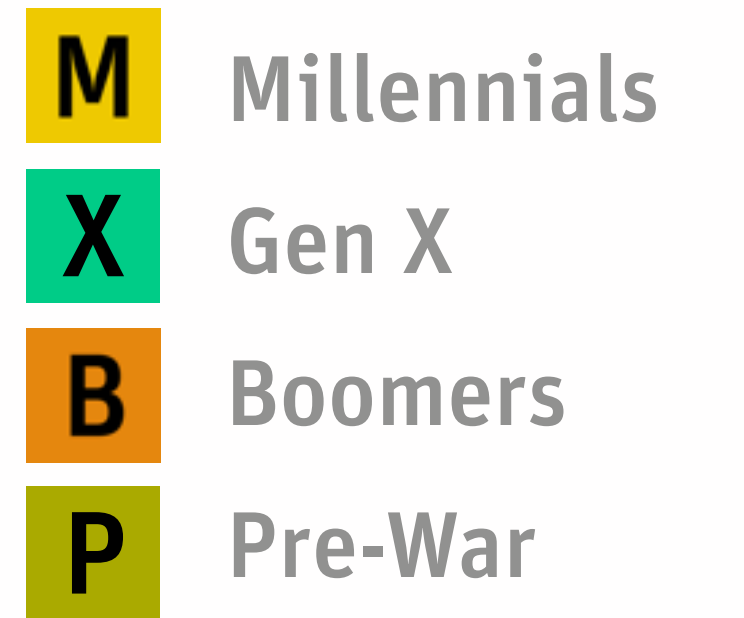




KEY INSIGHT:
**INFORMATION
SOURCES**

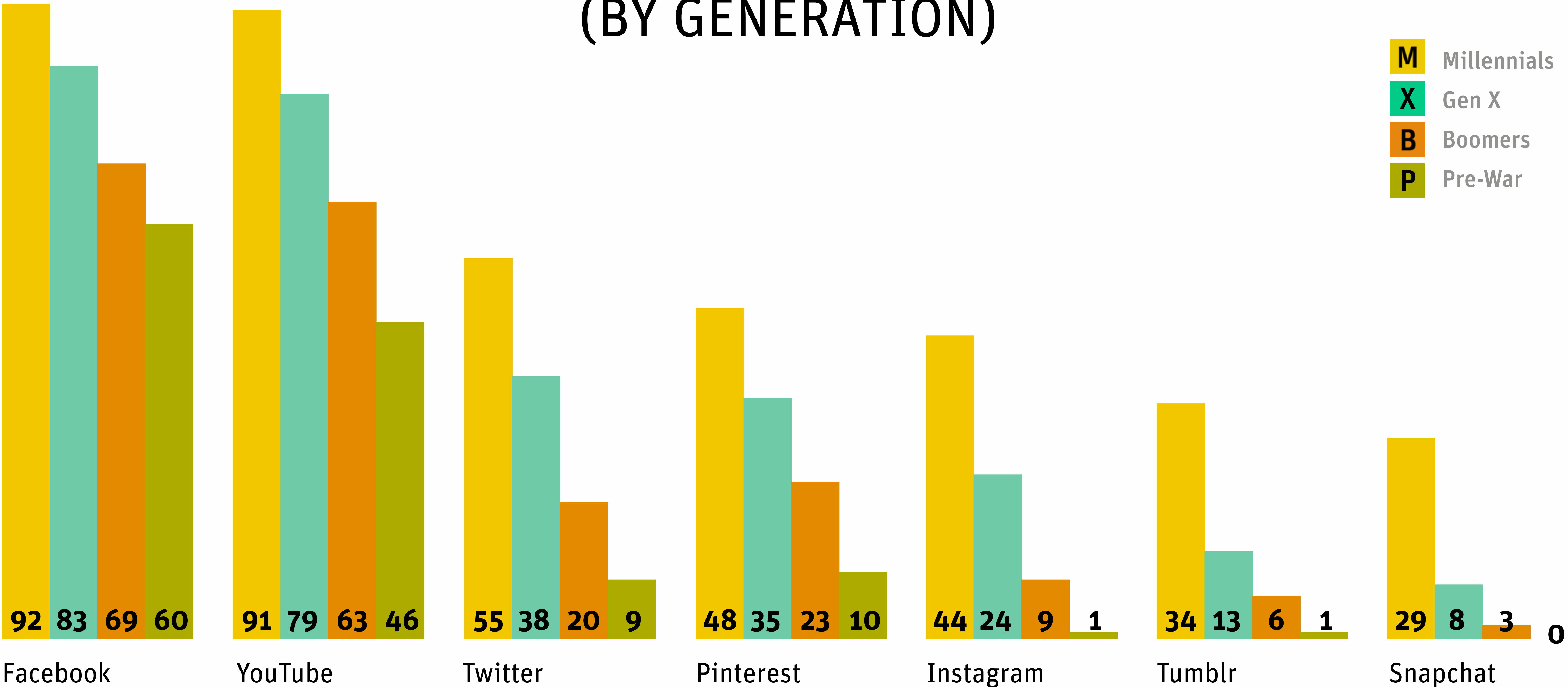
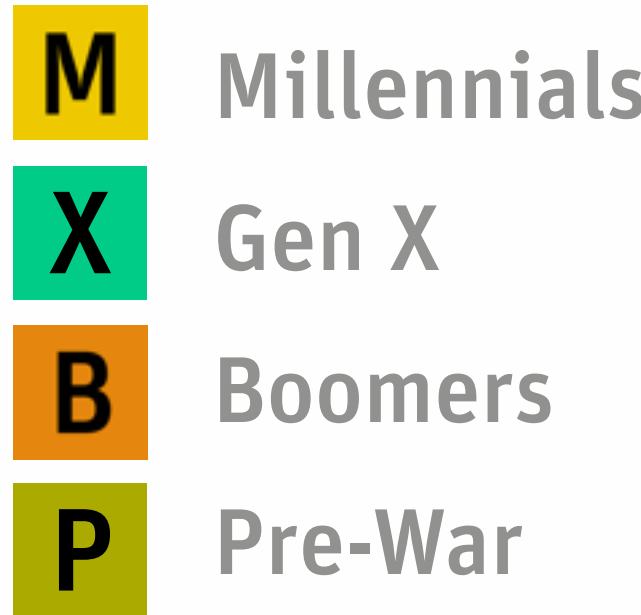
For **M**illennials,
social media
matters most.

ONLINE AND MAINSTREAM SOURCES (BY GENERATION)



Beyond Facebook and YouTube,
social media is driven
by the young(er).

USE OF SOCIAL MEDIA PLATFORMS (BY GENERATION)

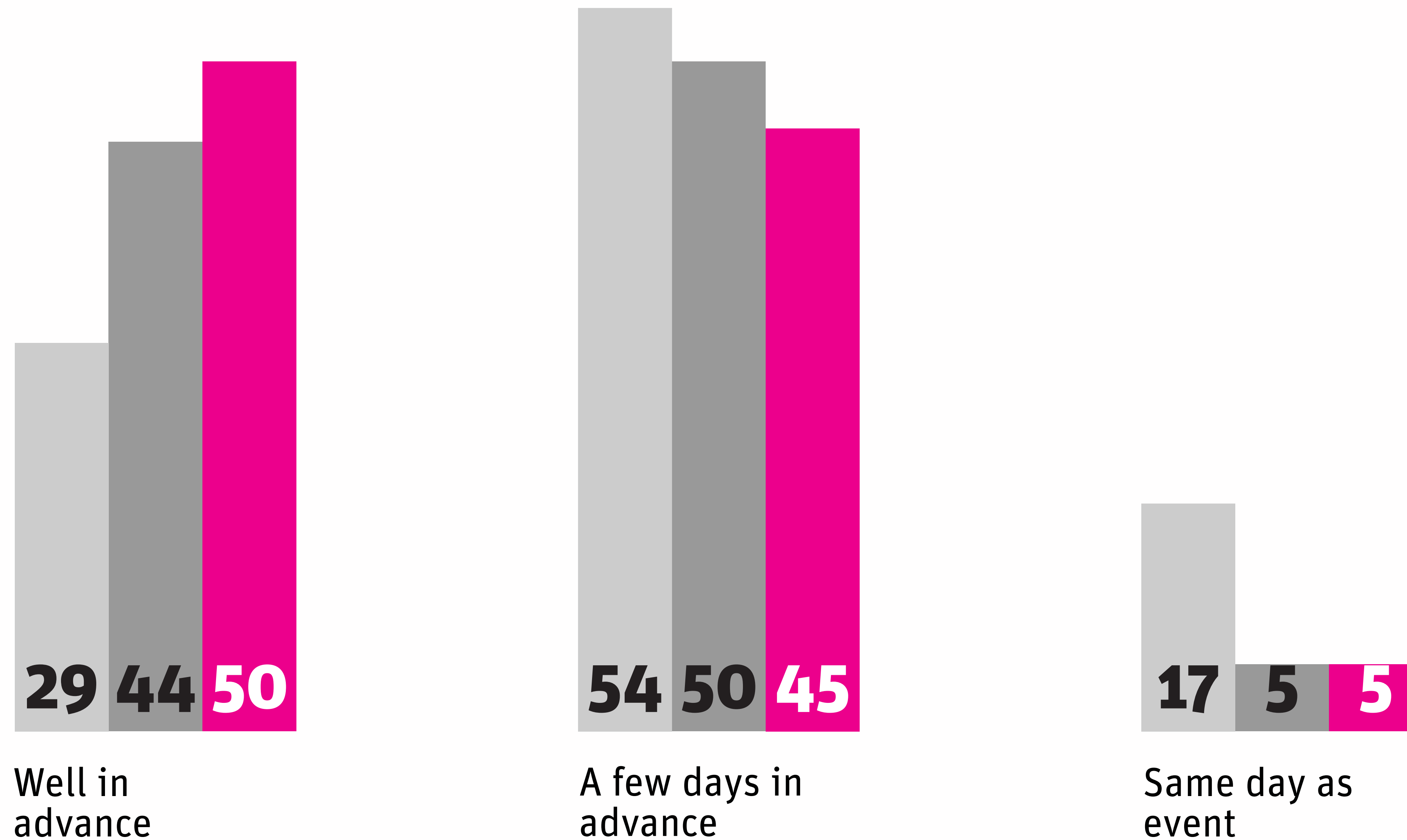


Advance Planning

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

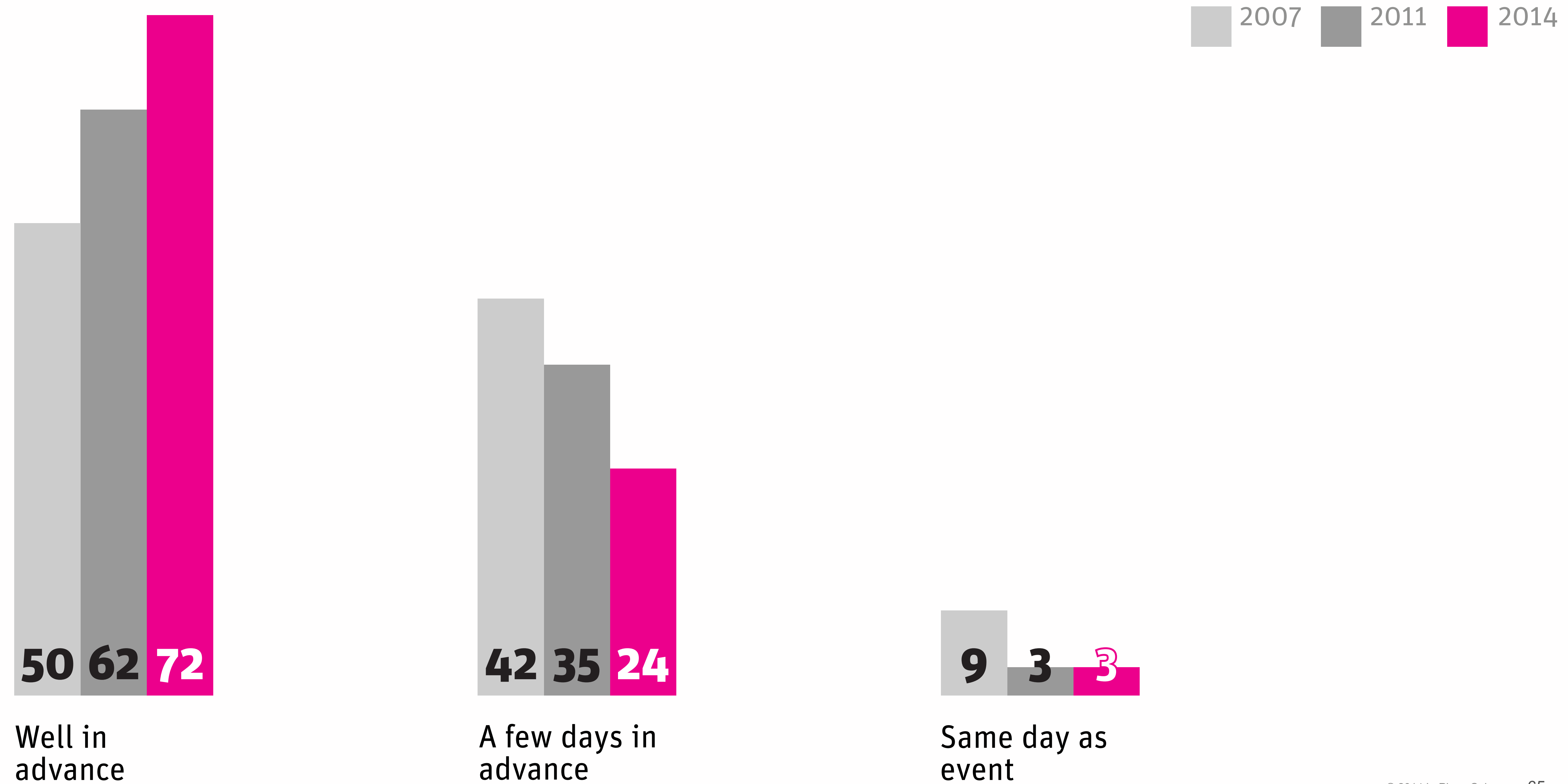
VISUAL ARTS ATTENDANCE PLANNING

2007 2011 2014



... and even more so for
the performing arts.

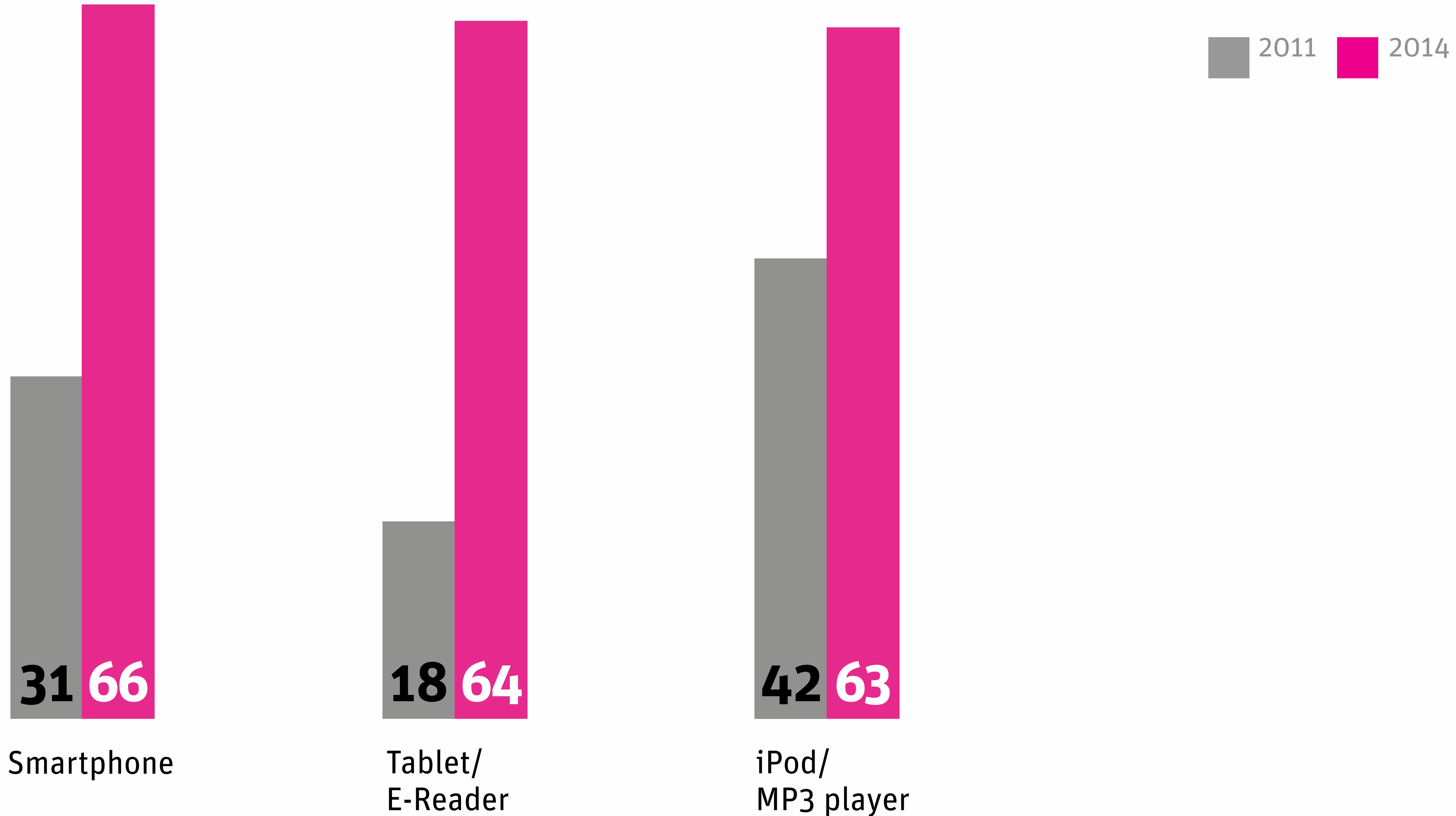
PERFORMING ARTS ATTENDANCE PLANNING



Technology & On-Site Experience

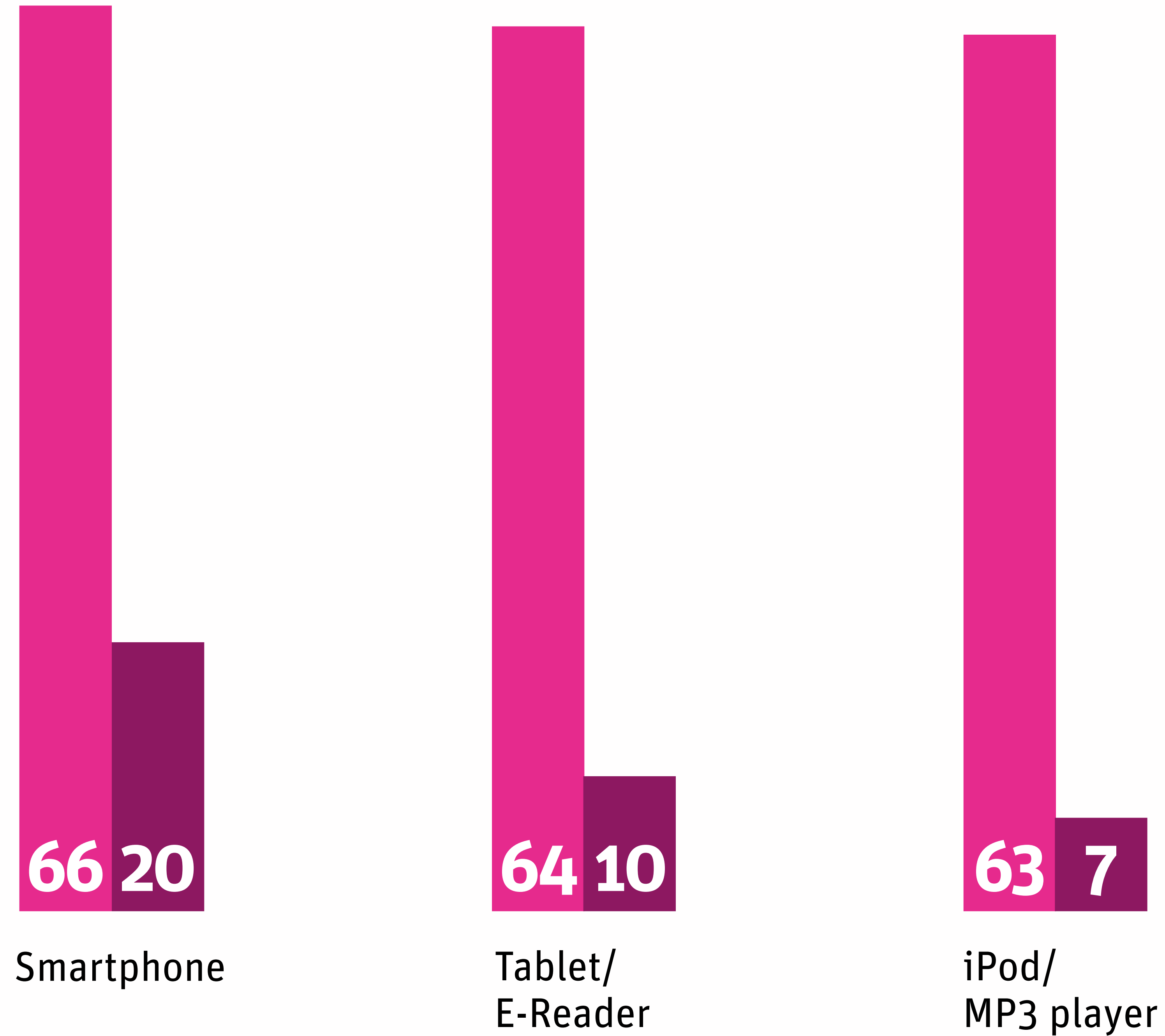
Ownership of mobile devices
has skyrocketed since 2011.

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



2014 Ownership
2014 Usage On-Site 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.

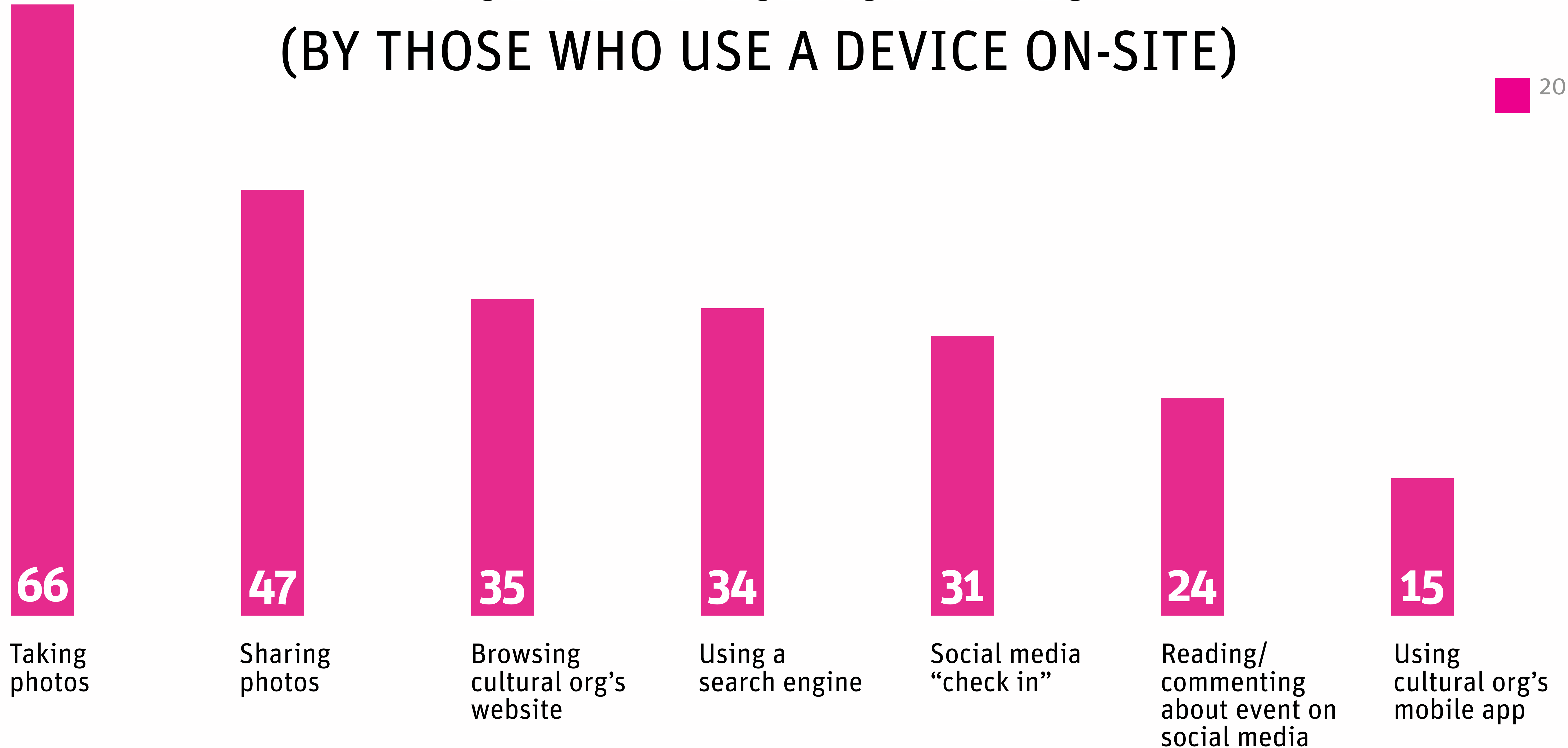


KEY INSIGHT: TECH USE ON-SITE

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

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

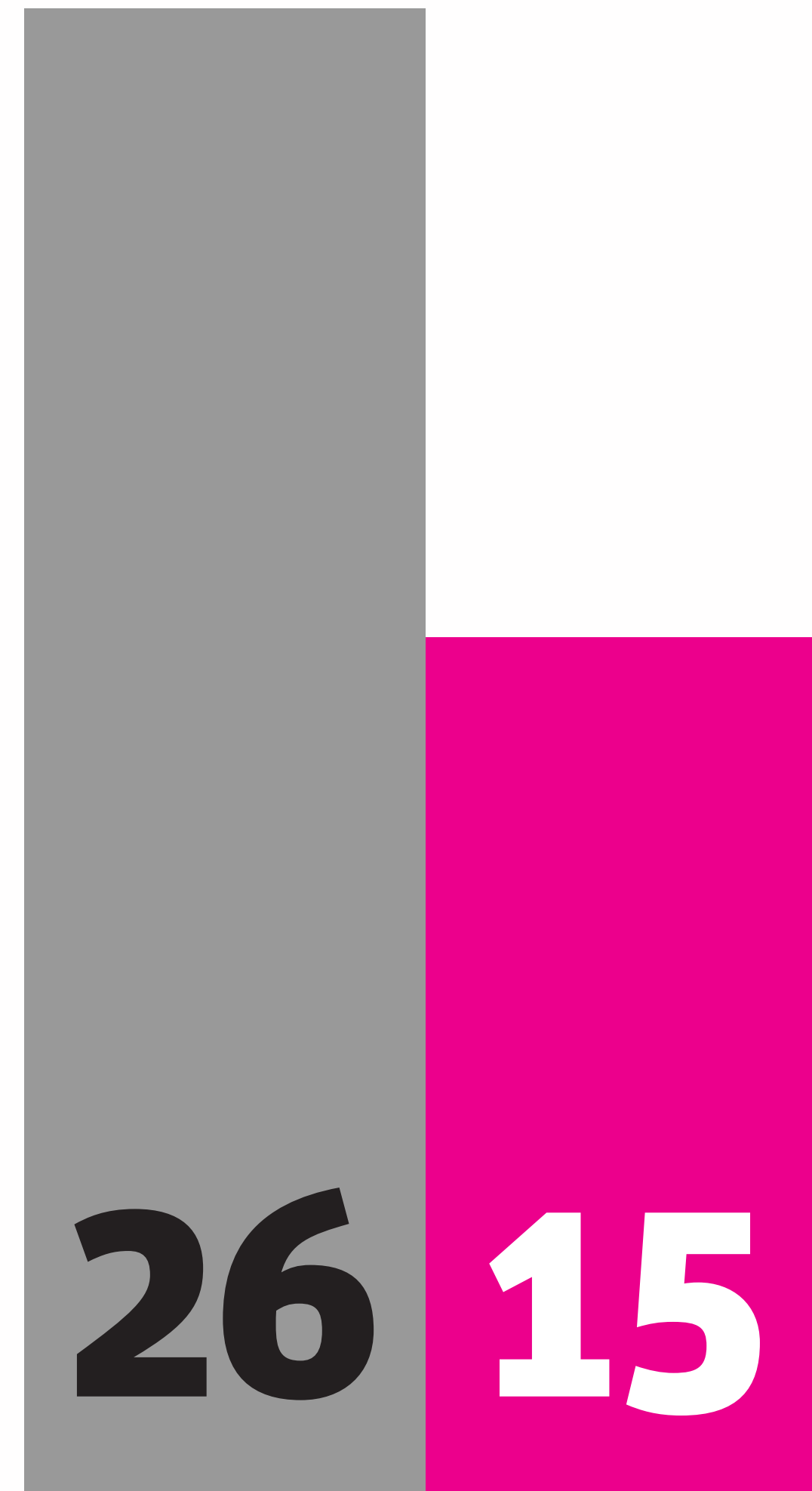
2014



Audience Loyalty

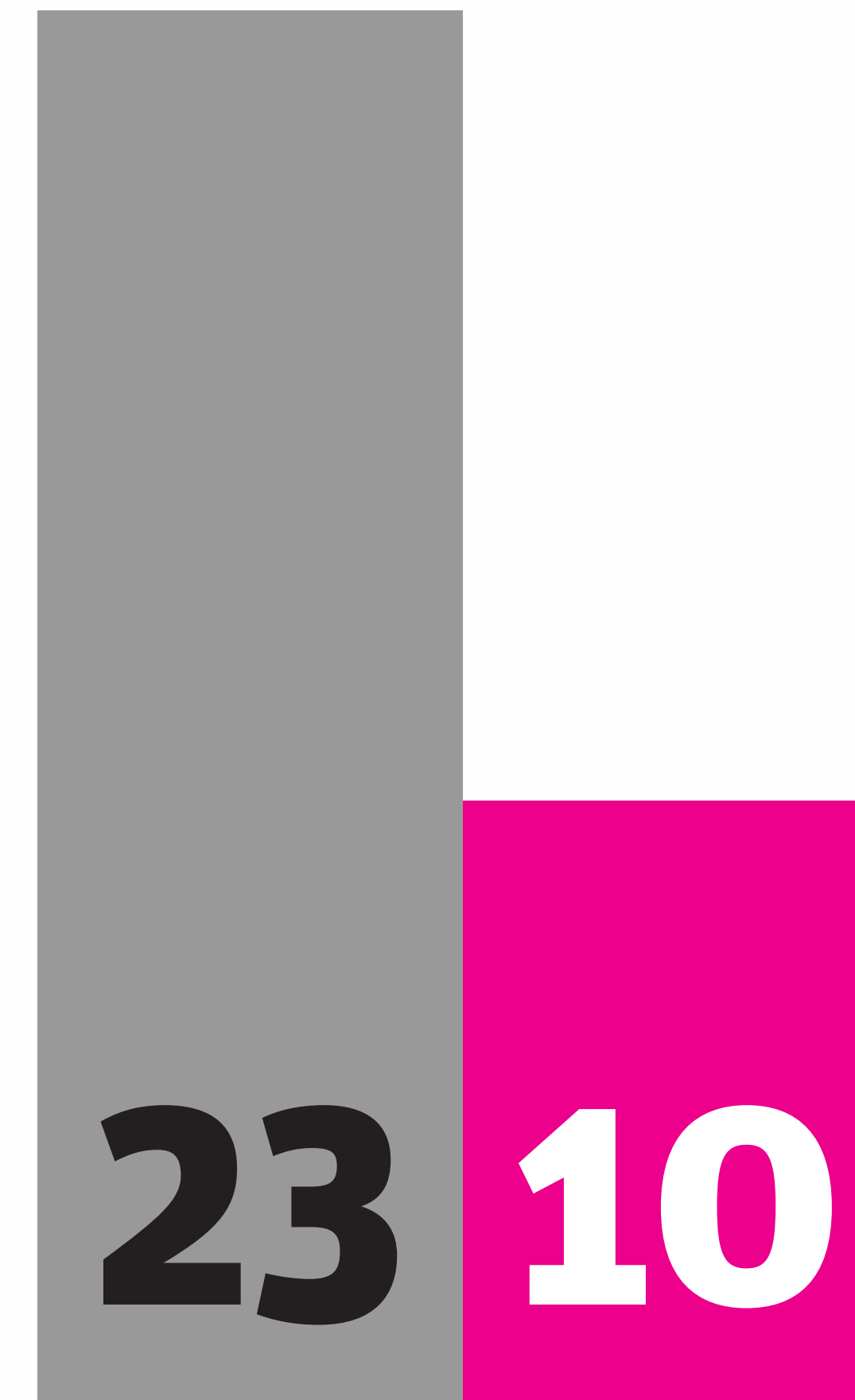
Loyalty continues to decline for both visual and performing arts.

VISUAL ARTS



% w/Memberships

PERFORMING ARTS

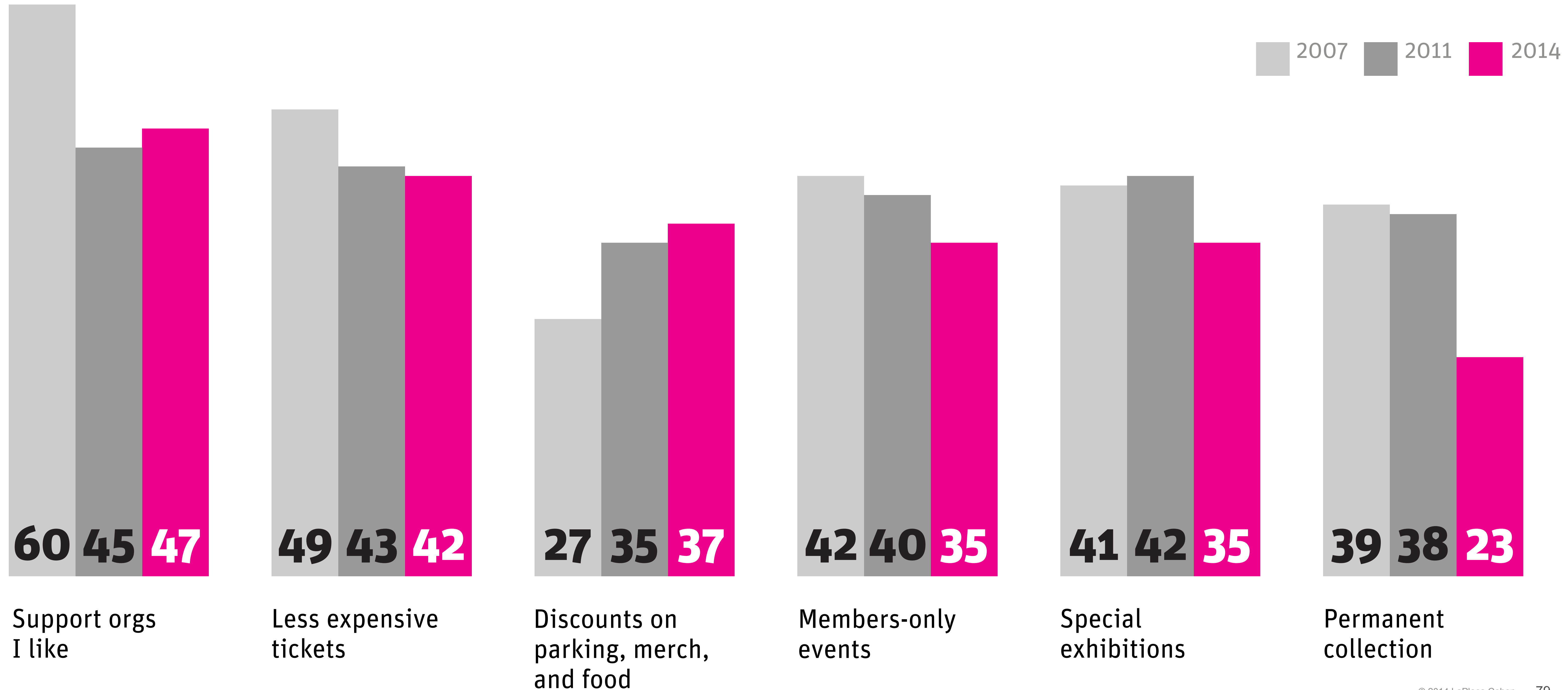


% w/Subscriptions



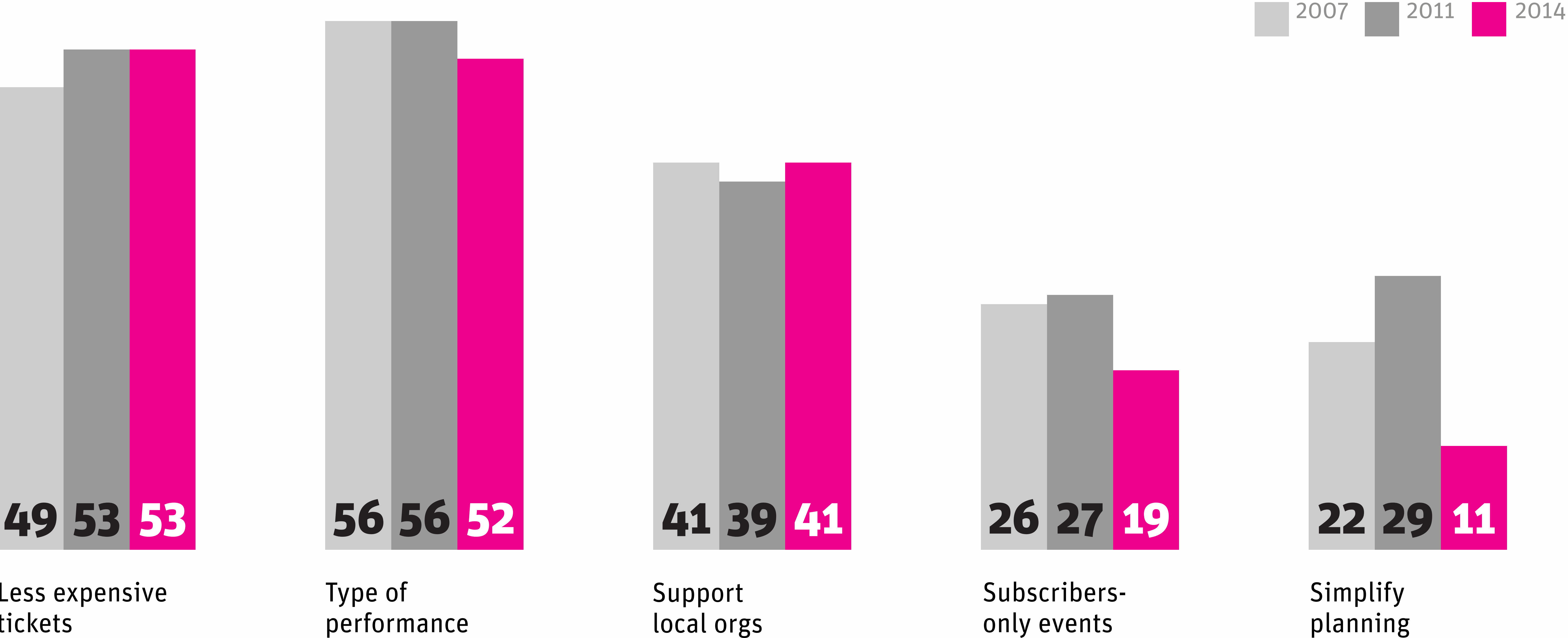
For visual arts membership,
affinity and value matter most.

MOTIVATIONS TO PURCHASE VISUAL ARTS MEMBERSHIPS



For performing arts
subscribers, value and
content steal the show.

MOTIVATIONS TO PURCHASE PERFORMING ARTS SUBSCRIPTIONS

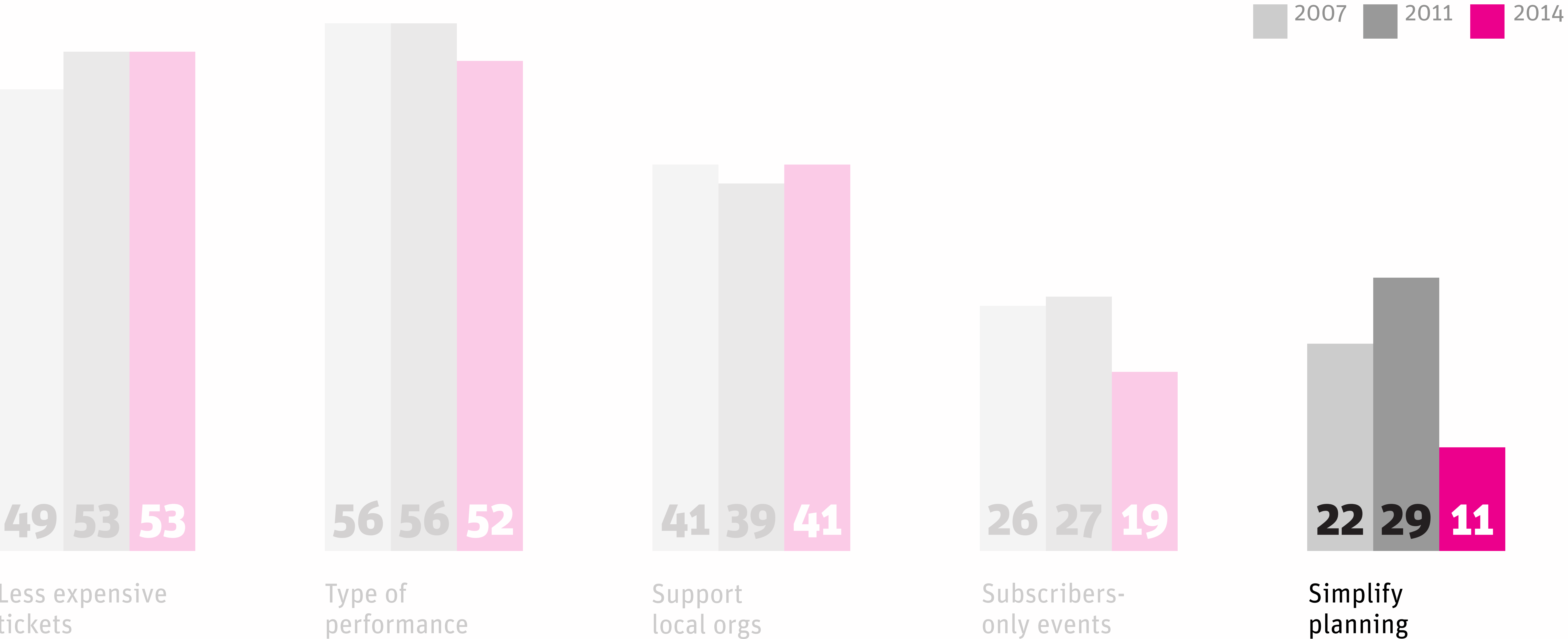




KEY INSIGHT:
**PERFORMING ARTS
LOYALTY DRIVERS**

DIY:
**Fewer subscribers
want you to
choose for them.**

MOTIVATIONS TO PURCHASE PERFORMING ARTS SUBSCRIPTIONS



Giving

Despite the economic downturn, charitable giving is vibrant.

2011

2014

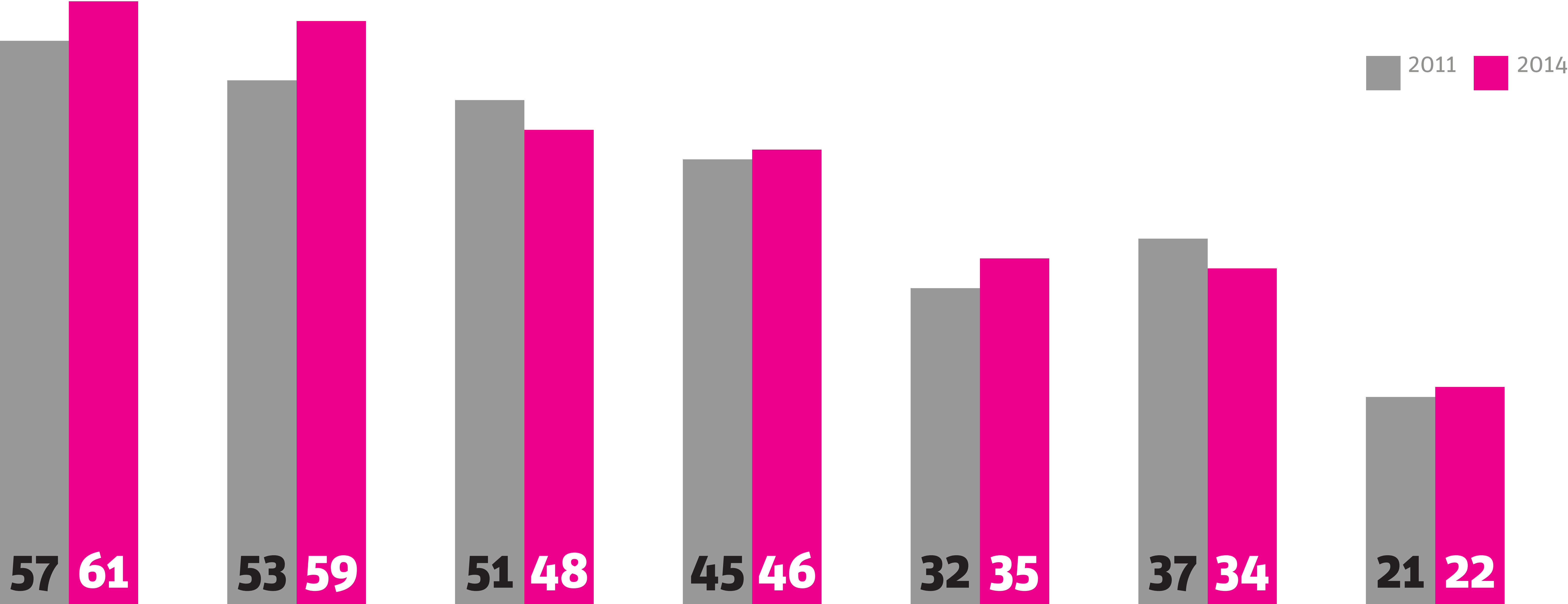
33%

35%

Plan to make charitable contribution
to cultural organizations

Donors reward community
impact and organizations
they enjoy.

MOTIVATIONS FOR CHARITABLE GIVING TO CULTURAL ORGANIZATIONS



Support orgs that benefit community

Support orgs I enjoy

Support the arts

Help with funding challenges

Tax deductibility

Help orgs achieve their potential

Benefits received

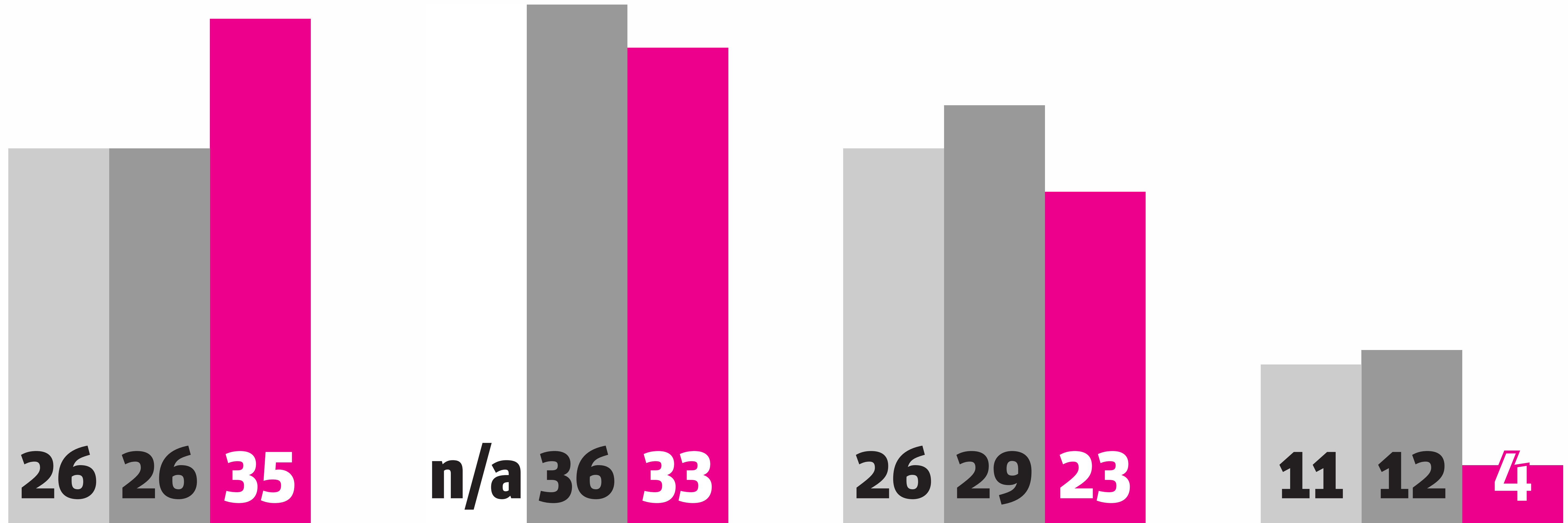
Sponsorship

Perceptions of cultural sponsorship are positive but nuanced.

More audiences believe
that sponsorship is
motivated by marketing.

NEGATIVE PERCEPTIONS OF CORPORATE SPONSORSHIP

2007 2011 2014



Sponsorship is just a marketing tactic

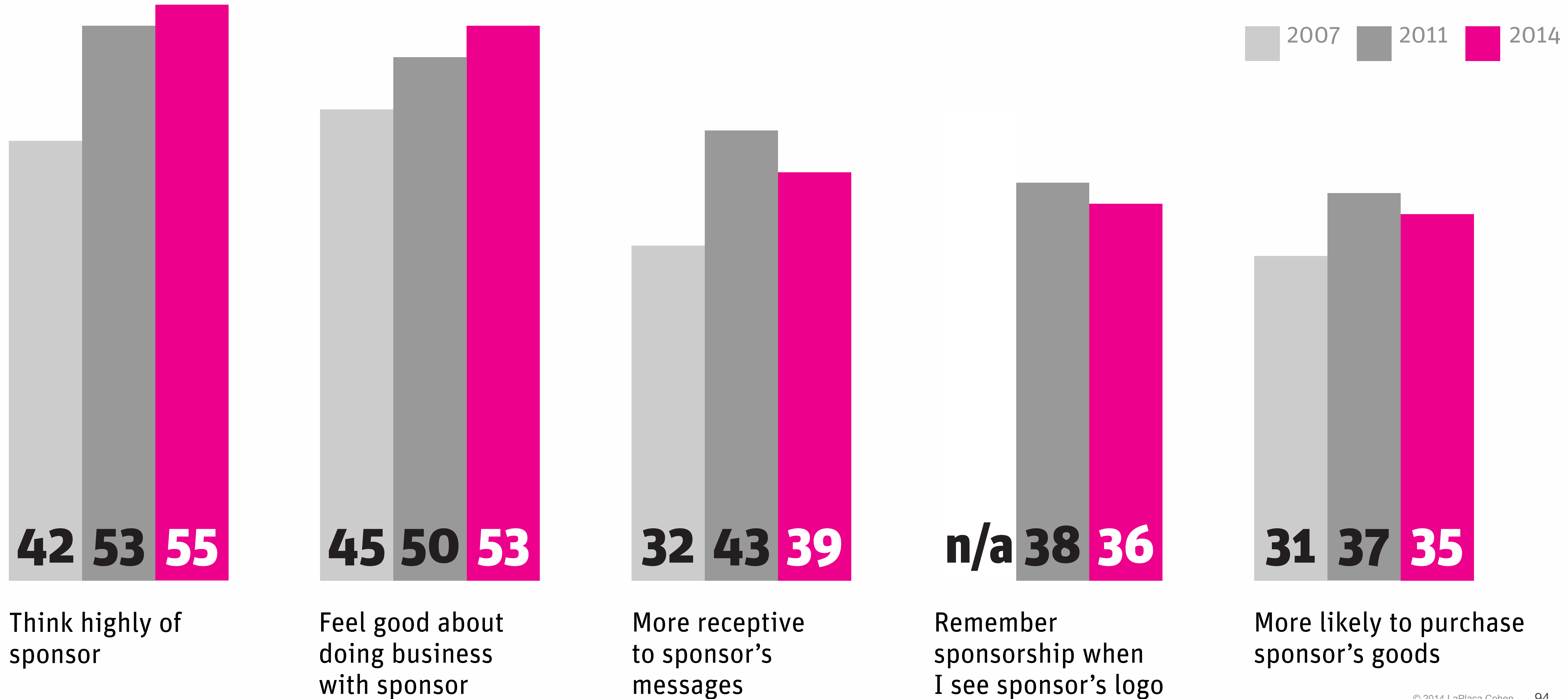
Corporations should have other priorities

Indifferent about sponsorship

No one benefits from sponsorship

But cultural sponsorships
are more admired than ever.

POSITIVE PERCEPTIONS OF CORPORATE SPONSORSHIP



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

heat seeking

plugged-in

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.”

“Something that enhances
your mind, body, and soul
in a unique and profound way.”

what do you think?

@laplacacohen

#culturetrack

For more information:

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

ACKNOWLEDGEMENTS

LAPLACA COHEN

Arthur Cohen, CEO

Allison Channing Jones, Strategist
Taulant Bushi, Designer
Wade Dansby, Senior Designer
Maggie Hartnick, Associate Director, Strategy and Branding
Elizabeth Lewis, Intern, Strategy and Branding
Robert Marlin, Account Manager/Media Planner/Buyer
Hil Moss, Associate Strategist
Garen Riedel, Account Manager
Hannah Speirits, Assistant Account Manager
Tom Zetek, Executive Creative Director

LaPlaca Cohen Consultants

Adriaan Fuchs
Jessie Montgomery
James Rohrbach

CAMPBELL RINKER

Dirk Rinker, President

Jim McGee, Vice President
Jennifer Spencer, Vice President of Custom Research

THE NEW YORK TIMES

Lou Fabrizio, Senior VP, Advertising
Nancy Karpf, Advertising Director, Fine Arts
Meredith Kopit Levien, Head of Advertising
Danielle Mattoon, Culture Editor
Diane McNulty, Program Director, Conferences
Tamara Samilenko, Events Coordinator, Advertising

THE TIMESCENTER CULTURE TRACK 2014 EVENT PANELISTS

Maxwell Anderson, Director, Dallas Museum of Art
Stephen Bruno, President of Marketing, The Weinstein Company
Rebecca Eaton, Executive Producer, Masterpiece
Jordan Roth, President, Jujamcyn Theatres
Julie Taymor, Director of Film, Opera, and Theater

POLSKIN ARTS & COMMUNICATIONS COUNSELORS

Philippa Polskin, President

Sarah Brown-McLeod
Justin Holden
Karen Hughes
Kate Lydecker

SIGHT EFFECTS CREATIVE SERVICES

ABOUT LAPLACA COHEN

For 20 years, LaPlaca Cohen has helped many of the world's leading cultural and creative organizations build powerful connections and achieve greater impact through strategy, design, and advertising. All of our work is grounded in a strategic understanding of cultural audiences, which we gain through ongoing research and experience with clients who span the spectrum of the cultural world.

In order to further advance our thought leadership and deepen our understanding of cultural audiences at large, LaPlaca Cohen developed Culture Track (fielded six times since 2001)—a tracking study focused exclusively on the ever-changing attitudes and behaviors of U.S. cultural consumers, as well as the trends in attendance and the motivators and barriers that affect participation.

Culture Track 2014 is the product of over a decade of research and dedication to producing a current, highly-actionable resource for the leading cultural institutions across the nation.

CULTURE TRACK '14