CULTURE TRACK 2011

LaPlaca Cohen

AMS PLANNING & RESEARCH

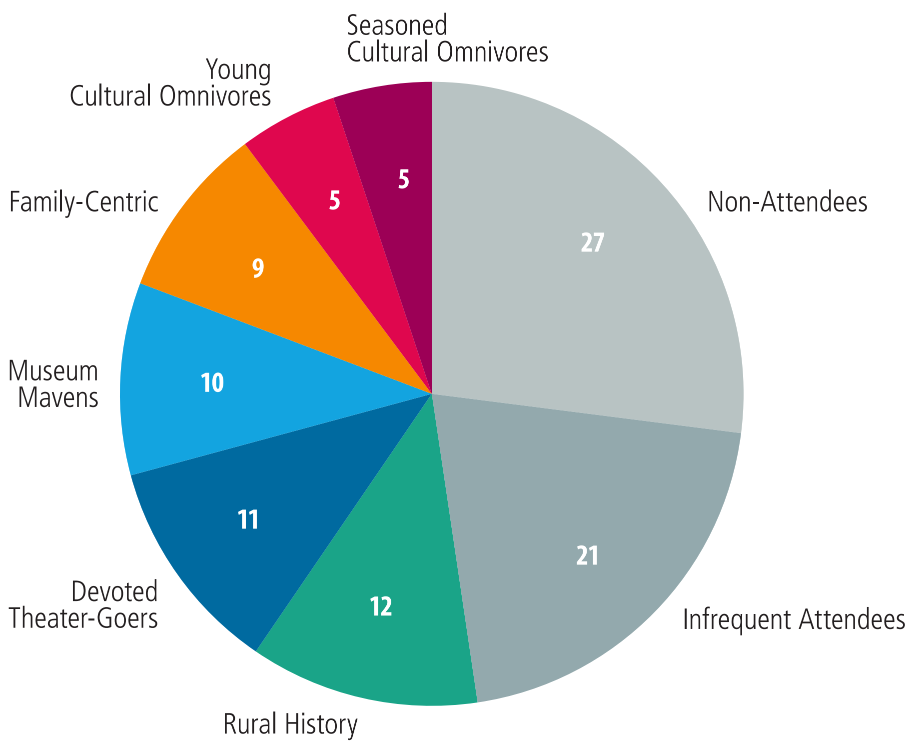
What is Culture Track?

- A survey of behaviors, motivators, and barriers to cultural participation across the United States.
- An ongoing tracking study, fielded five times since 2001.
- Data collected from over 4,000 online respondents in 2011, statistically mirroring the U.S. population, with screening to ensure a base level of cultural participation.
- A collaborative research project conducted as a service to the field, free to arts professionals, the media, scholars, students, and cultural leaders worldwide.

Cultural participation clusters into eight distinct segments.

The eight distinct segments

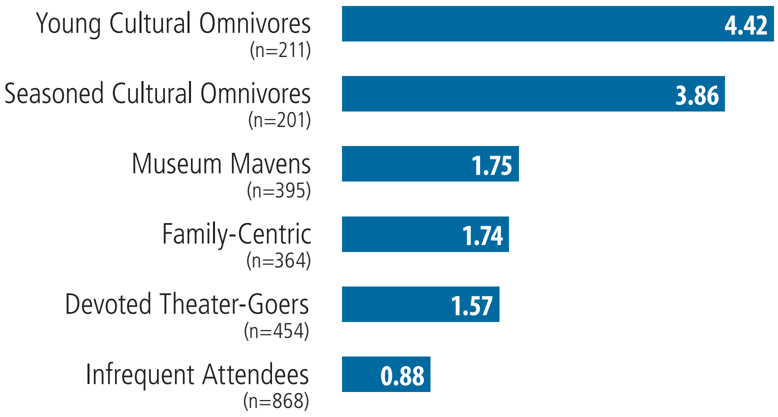
(n=4,005), units: %



- "Cultural Omnivores" divide into two distinct high-income segments: the more urban "Young Cultural Omnivores" and their mature counterparts, "Seasoned Cultural Omnivores."
- "Museum Mavens" are generally the prototypical museumgoer: wealthy, older, and female.
- "Devoted Theater-Goers" are mostly middle-aged or older; many are very high earners.
- "Family-Centric" segment members are primarily female. Two-thirds have not attained four-year college degrees. They frequently participate in child-friendly activities.
- "Rural History" segment members reside outside of urban markets and are most interested in historical sites.

So who's culturally engaged?

Average number of cultural events attended per month

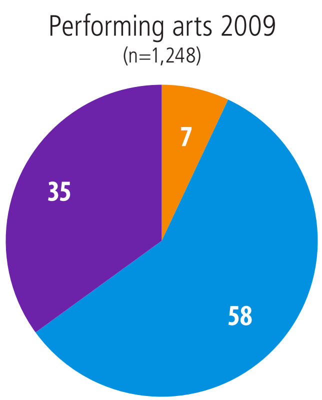


- "Young Cultural Omnivores" and "Seasoned Cultural Omnivores" are the most dedicated cultural participators.
- "Young Cultural Omnivores" are "samplers" who are most influenced by social factors, such as the desire first and foremost to socialize with friends.
- The core audience segments are art form-specific clusters such as "Museum Mavens" and "Devoted Theater-Goers."

Participation has not lived up to expectations.

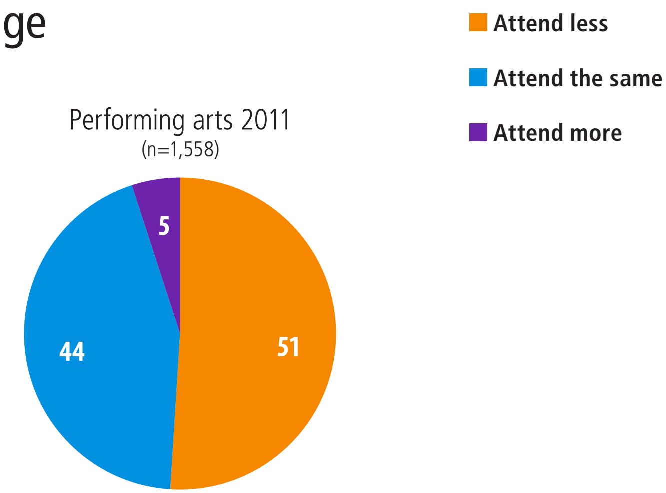
Expected change

units: %



Actual change

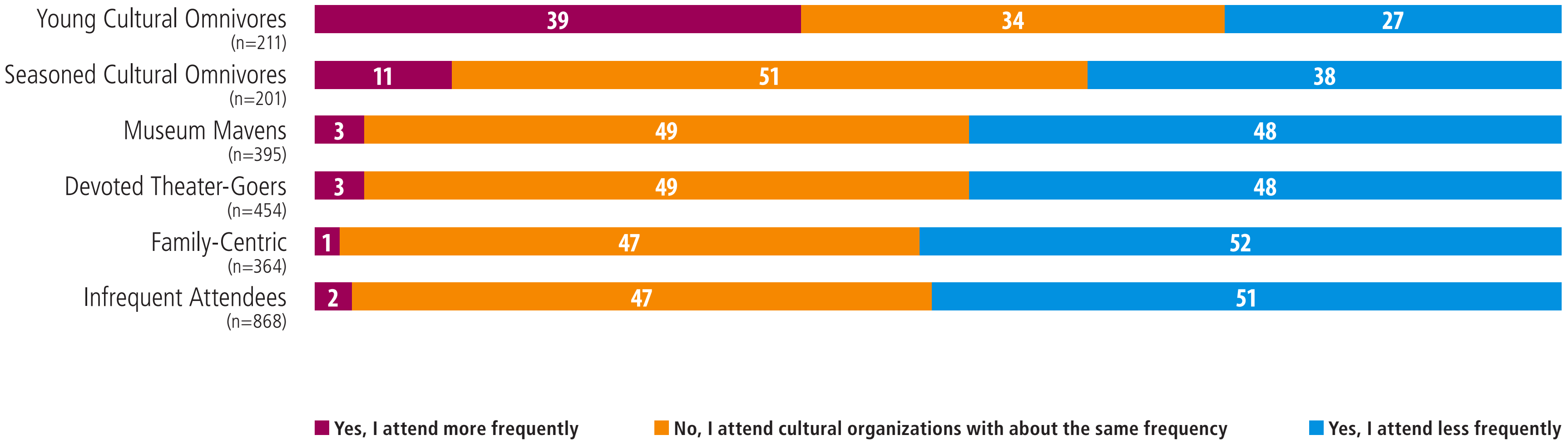
units: %



- In 2009, respondents did not think the economy would have a significant impact on their cultural participation in the next six months.
  - Just 7% of respondents expected they would decrease their performing arts attendance.
- In 2011, these mild expectations proved premature.
  - 51% of performing arts attendees say they have decreased their attendance because of the economy.

The most dedicated audiences have not let the economy deter them.

Shift in attendance
units: %

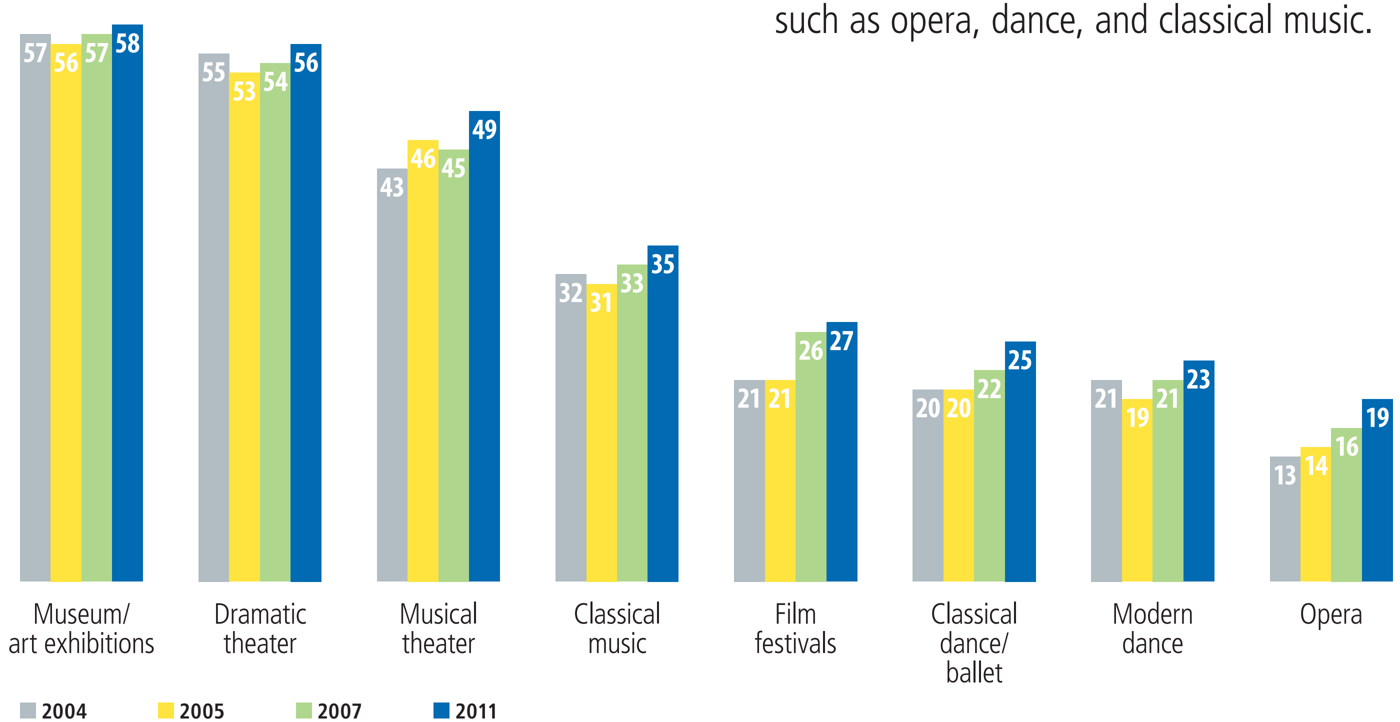


- The economy has had the least impact on "Young Cultural Omnivores" and "Seasoned Cultural Omnivores."
  - 73% of "Young Cultural Omnivores" have increased or maintained their level of attendance, along with 62% of "Seasoned Cultural Omnivores."

Participation patterns by art form remain steady.

Cultural activities attended at least once a year, by art form

(n=4,005), units: %

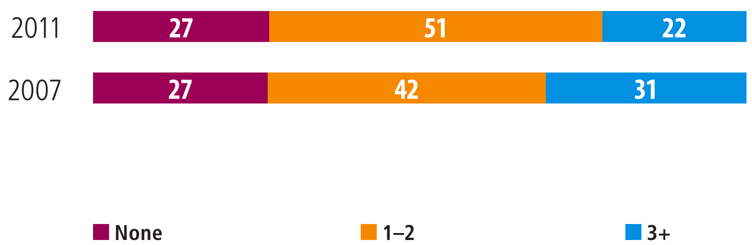


- "At least once a year" attendance has held steady across all art forms.
- Museum/art exhibitions (57%) and theater (55%) continue to be the most popular art forms.
- Participation trends apply across art forms such as opera, dance, and classical music.

The flipside: frequency of participation is down.

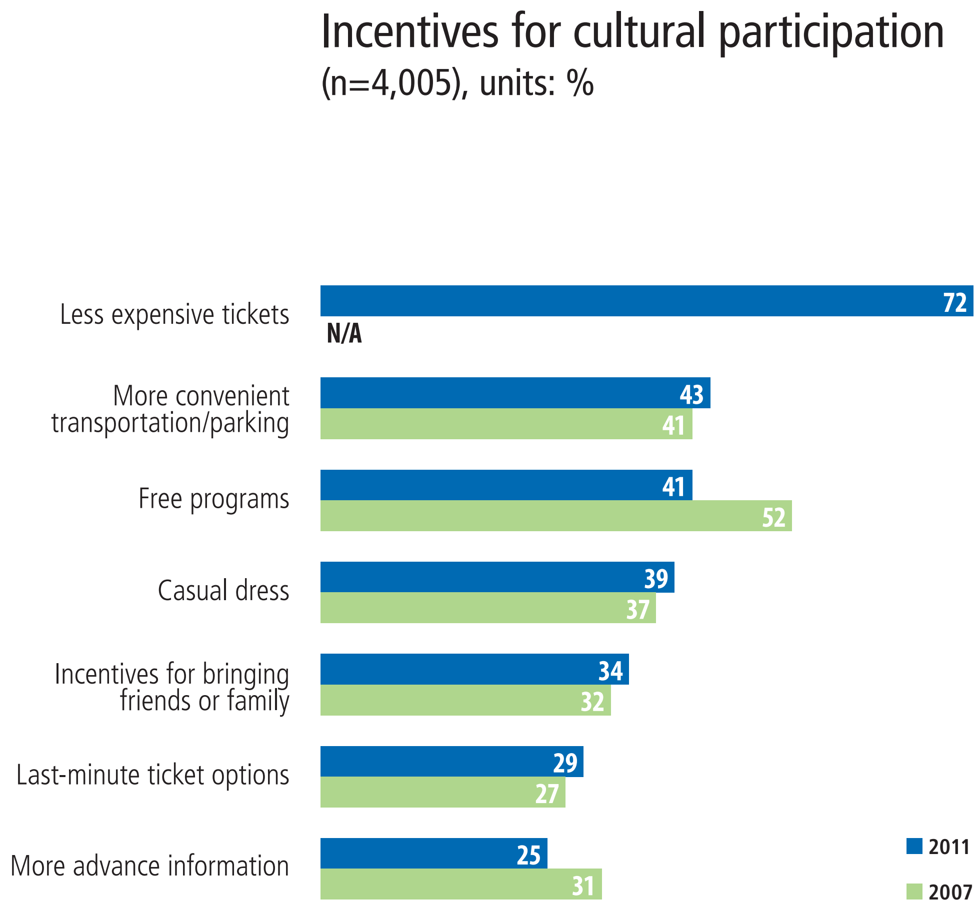
Number of cultural events attended per month

(n=4,005), units: %



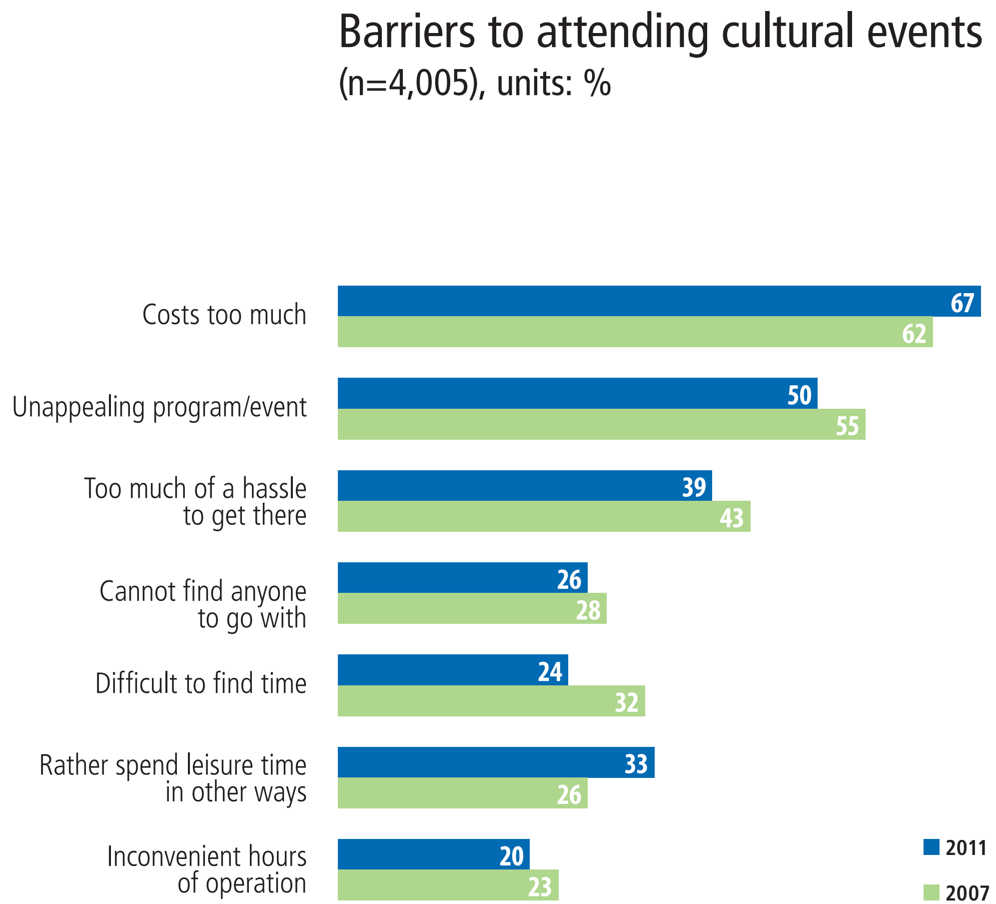
- Cultural consumers are still participating, but they are just participating less frequently.
- The ranks of the most frequent attendees – those who attend 3+ cultural events a month – have declined by almost one-third: 22% in 2011 versus 31% in 2007.
- Across the board, respondents are attending fewer cultural events per month.
- Non-attendees have held steady at 27%, while infrequent attendees – those attending 1–2 events per month – increased significantly: 51% in 2011 versus 42% in 2007.

Incentives to cultural participation: cost, connection, and convenience.



- The value proposition remains the most influential driver as well as the biggest barrier.
  - However, fewer respondents are seeking free programs: 41% in 2011 versus 52% in 2007.
- Respondents see cultural events as an opportunity to make connections with friends and family.
  - 34% are interested in incentives for bringing friends and family.
- Convenience is an important part of the equation.
  - For example, 43% of respondents would like more convenient transportation and parking options.

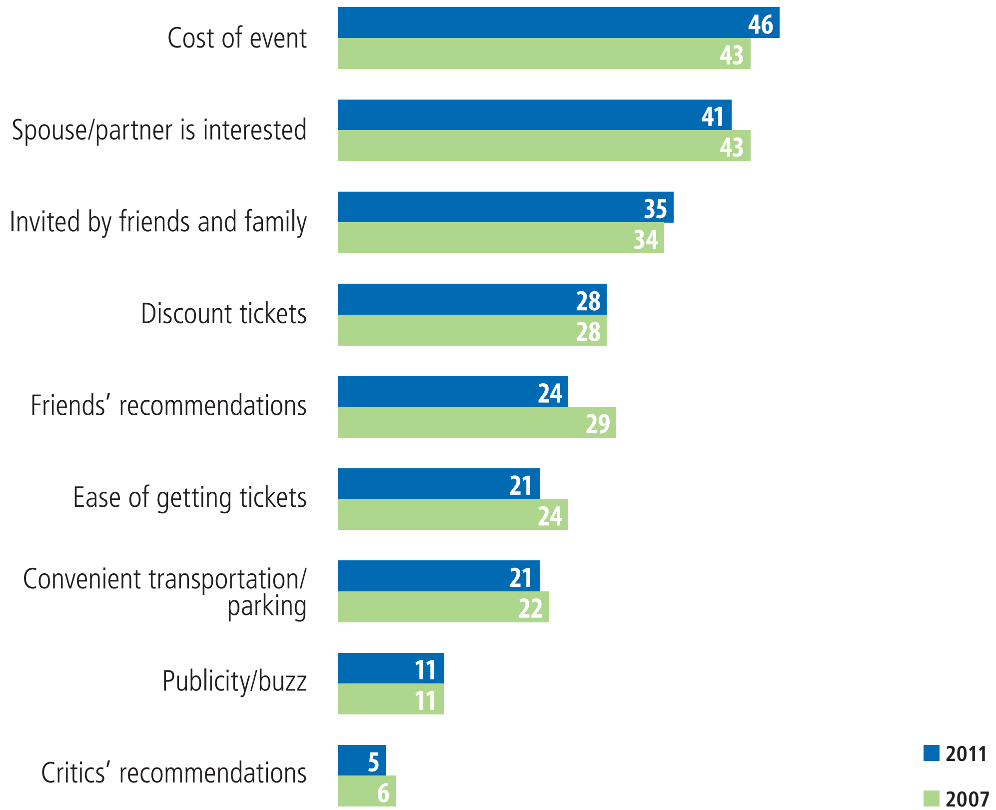
Barriers focus on content, convenience, and competition.



- After cost, content is still king: 50% of all respondents said unappealing programming or events deter attendance.
- Inconvenience ("too much of a hassle," 39%) remains a major barrier.
- Competition for audiences' attention seems to be increasing. One-third of respondents would "rather spend leisure time in other ways."

After cost, social factors dominate decision-making.

"Very influential" in decision to attend a cultural event
(n=4,005), units: %

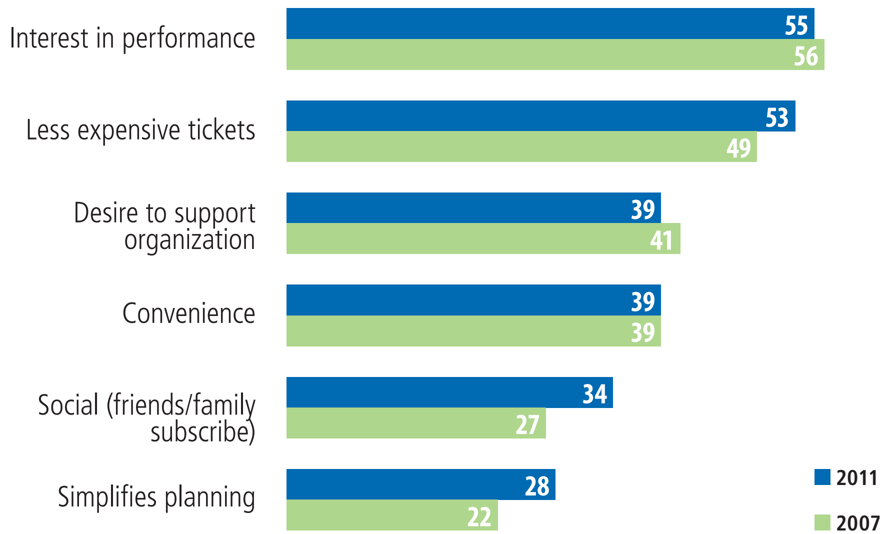


- Consistently, three of the top five influencers for participation reflect the importance of social or personal factors.
  - While friends' recommendations (24%) are less influential than economic concerns, they are still almost five times as important as critics' recommendations (5%).

For performing arts subscriptions, the show comes first.

Subscription influencers

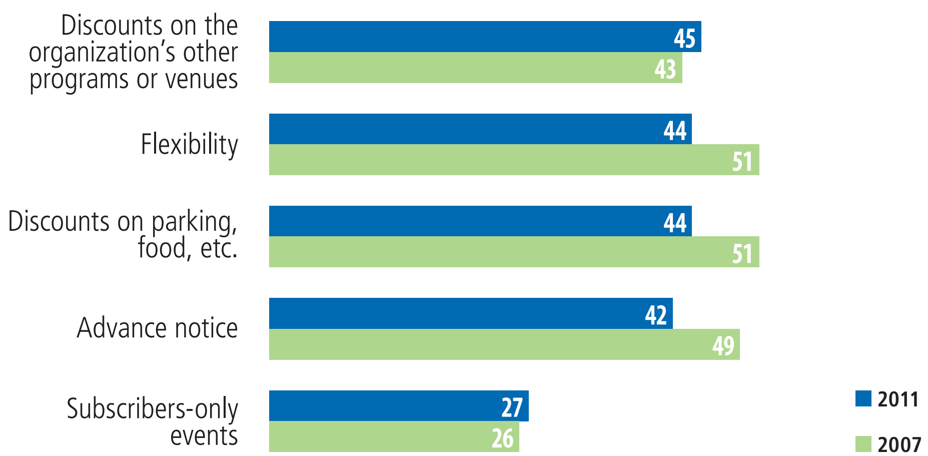
(n=694), units: %



- Content (interest in performance) is still the number one influencer for performing arts subscriptions (55%).
  - The cost of tickets remains a strong influencer for performing arts subscriptions (53%).

It’s about convenience, not exclusivity.

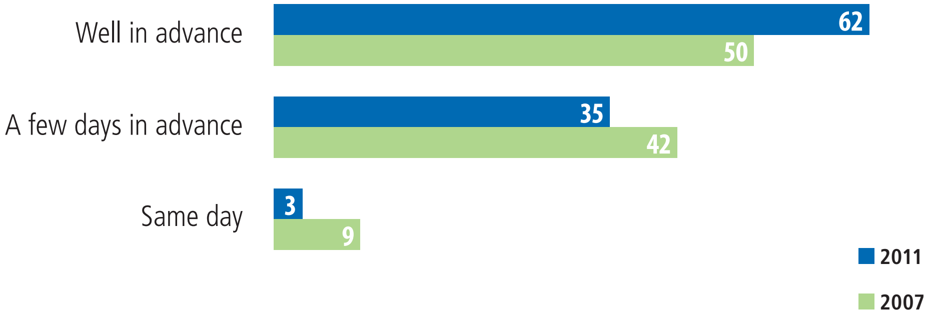
Performing arts subscription incentives
(n=694), units: %



- Exclusive subscribers-only events are not major incentives for subscription (27%) purchases.
- Instead, flexiblity, deals, and convenient ticket exchanges are attractive to potential subscribers.

On the whole, advance planning is on the rise.

Performing arts
time frame of decision to attend
(n=3,152), units: %



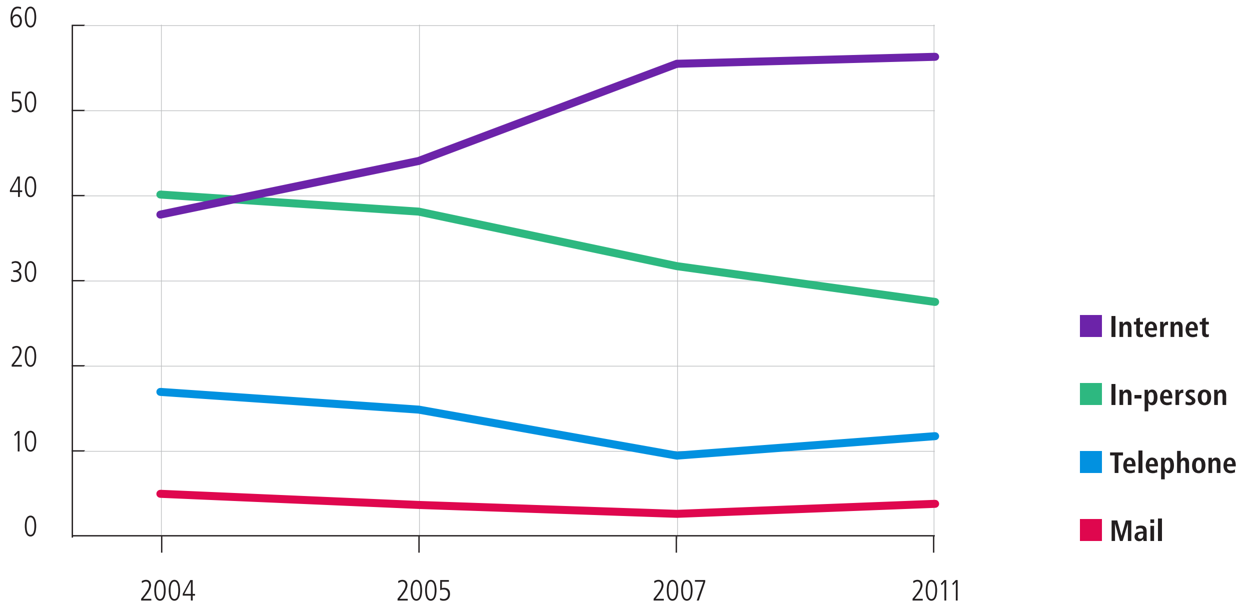
- Performing arts audiences have become significantly less spontaneous and are planning their attendance much farther in advance.
  - Just 3% of respondents attend a performing arts event on the same day of their decision, down from 9% in 2007.

Online ticket sales dominate all other channels.

Performing arts
referred ticket purchase method

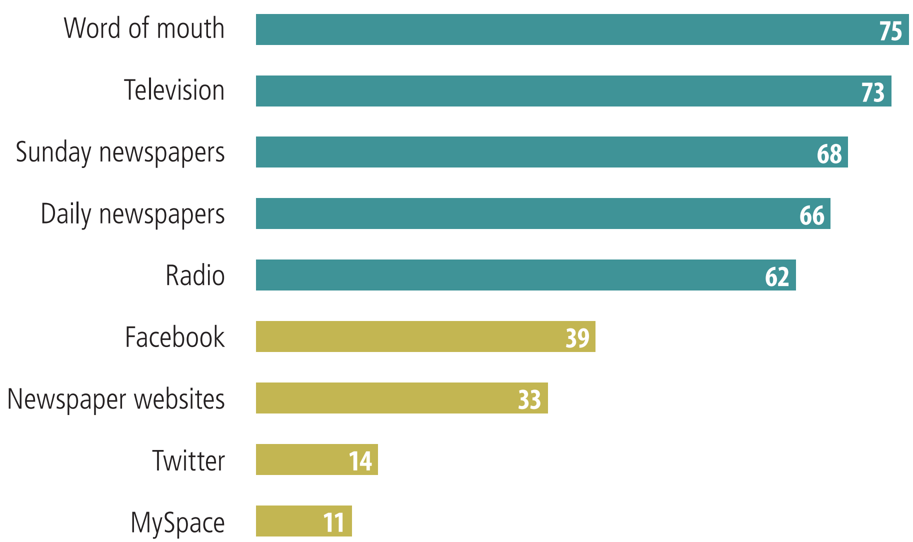
(n=3,152), units: %

- Respondents of all ages prefer the Internet for purchasing tickets.
- In-person box office sales for performing arts continue to decline dramatically.



Word of mouth, traditional media, and social media: the recipe is now high-tech and high-touch.

Information sources consulted for culture
(n=4,005), units: %

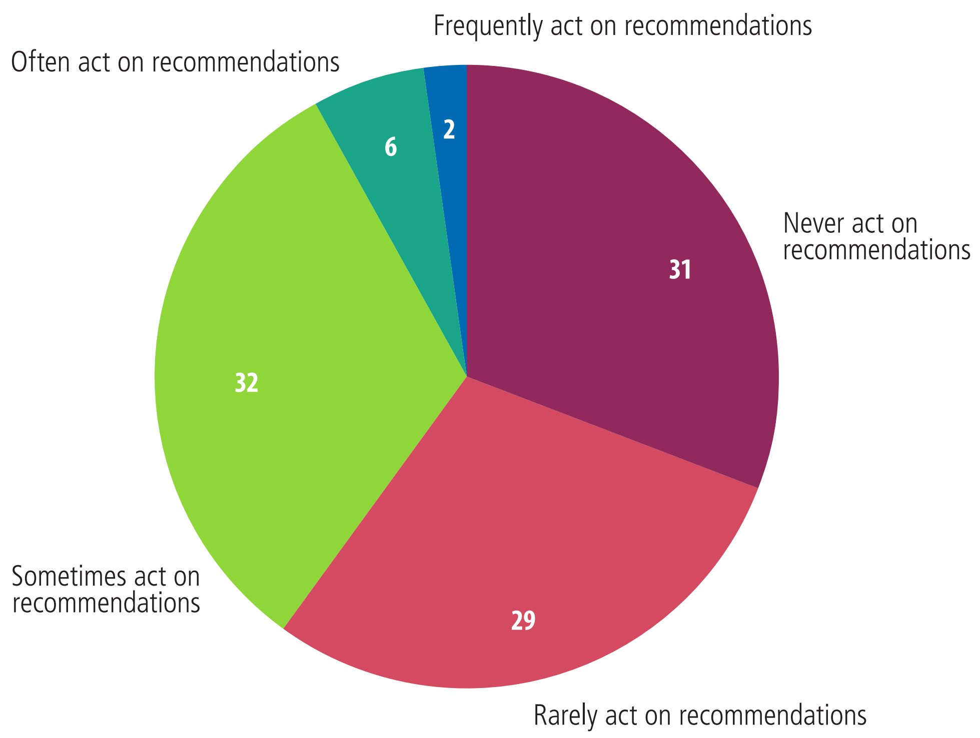


- Traditional media channels are still very important ways of sharing cultural information.
- Word of mouth (75%) has always been essential, but now it expresses itself both online and off.
- Social media is a new channel for word of mouth.
  - Appearing in this study for the first time, data on Facebook (39%) and Twitter (14%) provide a baseline for monitoring the growth of their influence.

Social media influences cultural participation.

Effectiveness of social media recommendations

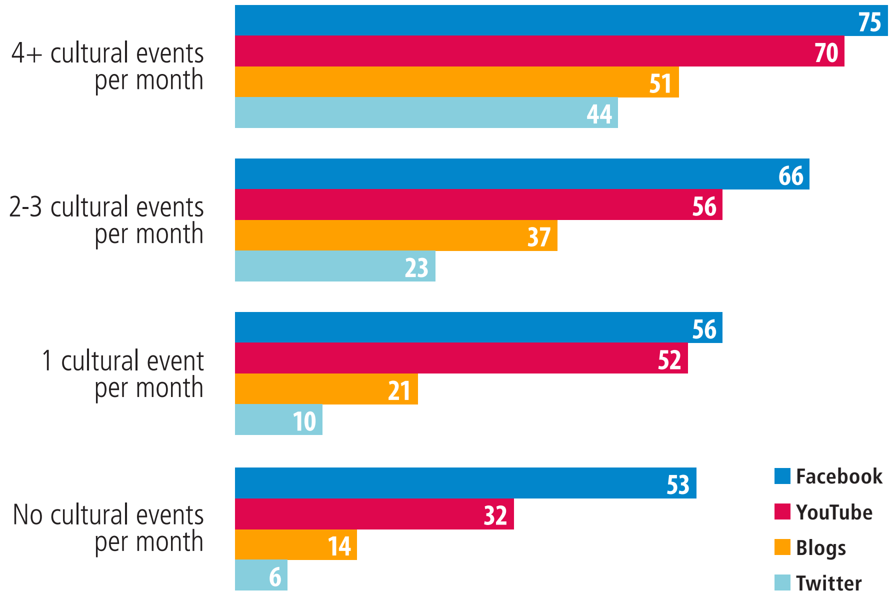
(n=4,005), units: %



- Four out of ten of respondents sometimes, often, or frequently act on recommendations for cultural events received through social media.

Frequent attendees are the most likely to use social media to find out about culture.

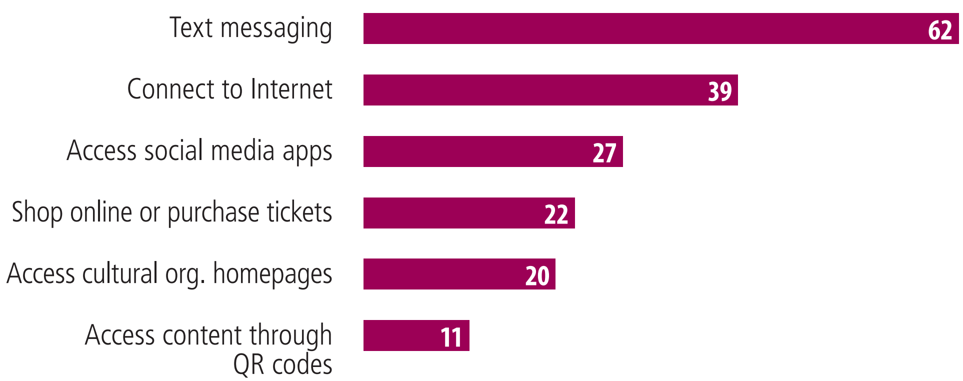
Social media usage as a function of attendance
(n=4,005), units: %



- Over half of the most frequent cultural attendees regularly utilize Facebook (75%), YouTube (70%), and blogs (51%) on at least a weekly, if not daily basis.

Mobile technology is a gateway to cultural homepages.

How mobile technology gets used
(n=3,765), units: %



- Audiences are using technology to tap into culture on their home computers, their mobile phones, and their tablet computers.
  - 20% of respondents with mobile phones use them to access the websites or the social media applications of cultural organizations.
  - 11% of respondents use their mobile phones to access content through quick response (QR) codes.

CULTURE TRACK 2011

LaPlaca Cohen

AMS PLANNING & RESEARCH