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.

What does Culture Track explore?

- Attitudes and behaviors of cultural audiences.
- Trends in attendance at and affiliation with visual and performing arts organizations.
- Motivators and barriers affecting arts participation.

What's new in 2011?

- This year's study gauges the ongoing effect of the economic downturn by tracking against our 2009 study, *Cultural Audiences in the New Economy*.
- In addition to baseline tracking data (for comparison with previous studies), *Culture Track 2011* probes usage and impact of new technology and the proliferation of social media platforms.
- *Culture Track 2011* also introduces a new, sophisticated segmentation of cultural consumers developed in partnership with SDR Consulting.

Who did we talk to in 2011?

- 4,005 respondents participated in a nation-wide online survey, representing all 50 states.
  - 18 or over.
  - U.S. residents.
  - Attended at least one cultural activity in the past year.
- Survey fielded and completed in January 2011.
- Margin of error = ± 1.6%.

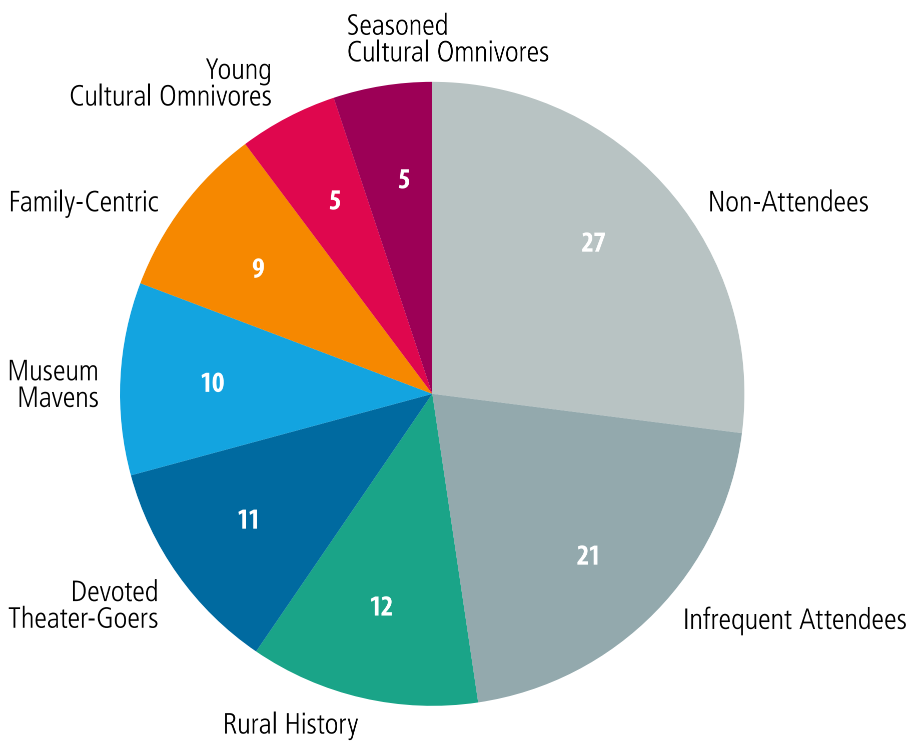
How is Culture Track different?

- *Culture Track* focuses on participation with non-profit visual and performing arts organizations.
- The study defines arts participation as attendance at a specific range of cultural activities, such as:
  - Museum / art exhibitions
  - Dramatic theater
  - Musical theater
  - Classical music
  - Film festivals
  - Classical dance / ballet
  - Modern dance
  - Opera
- It does not focus on visiting parks and historic sites.
- Unlike the National Endowment for the Arts' 2008 *Survey of Public Participation in the Arts*, *Culture Track* considers a broader range of cultural participation, but does not include reading literature, personal performance, art creation, or arts-related classes.

The Current Cultural Landscape

Cultural participation clusters into eight distinct segments.

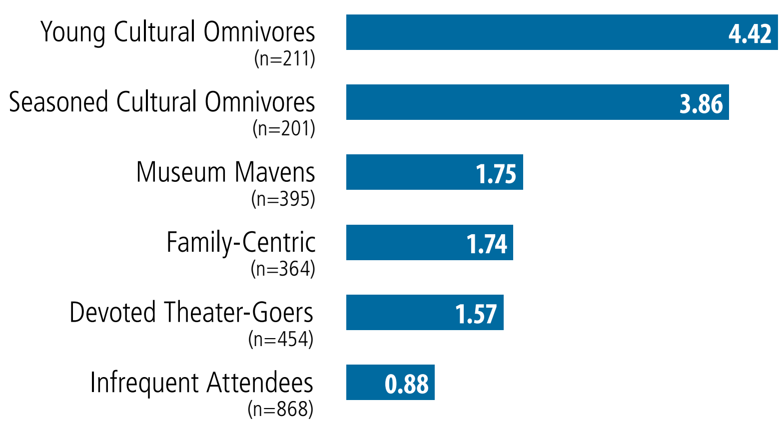
The eight distinct segments
(n=4,005), units: %



- "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?

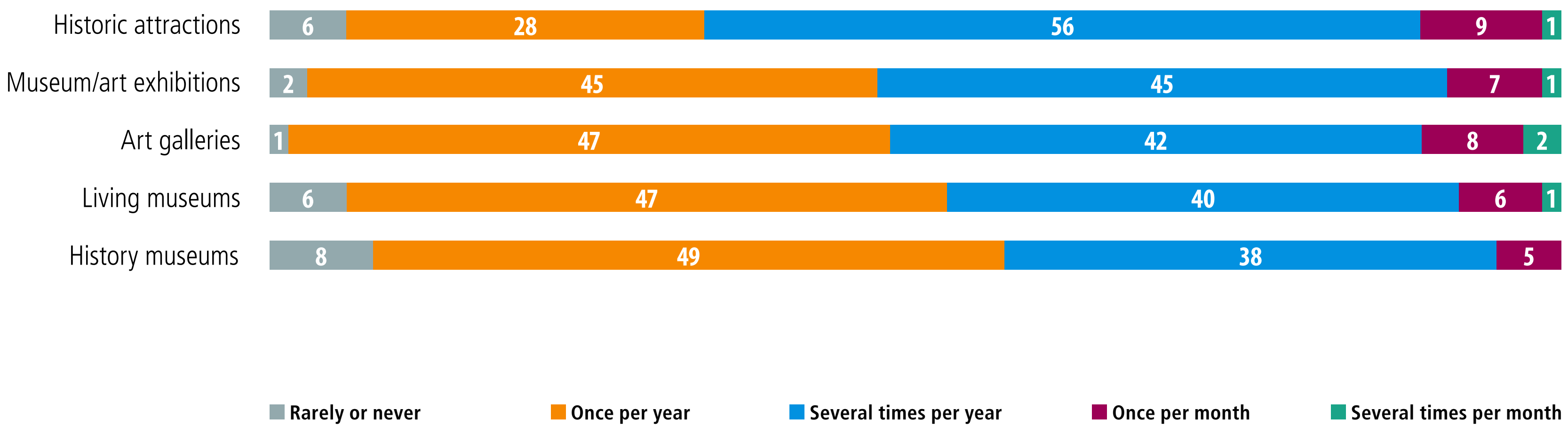
Average number of cultural events attended per month



- "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."

Each segment has distinct participation patterns.

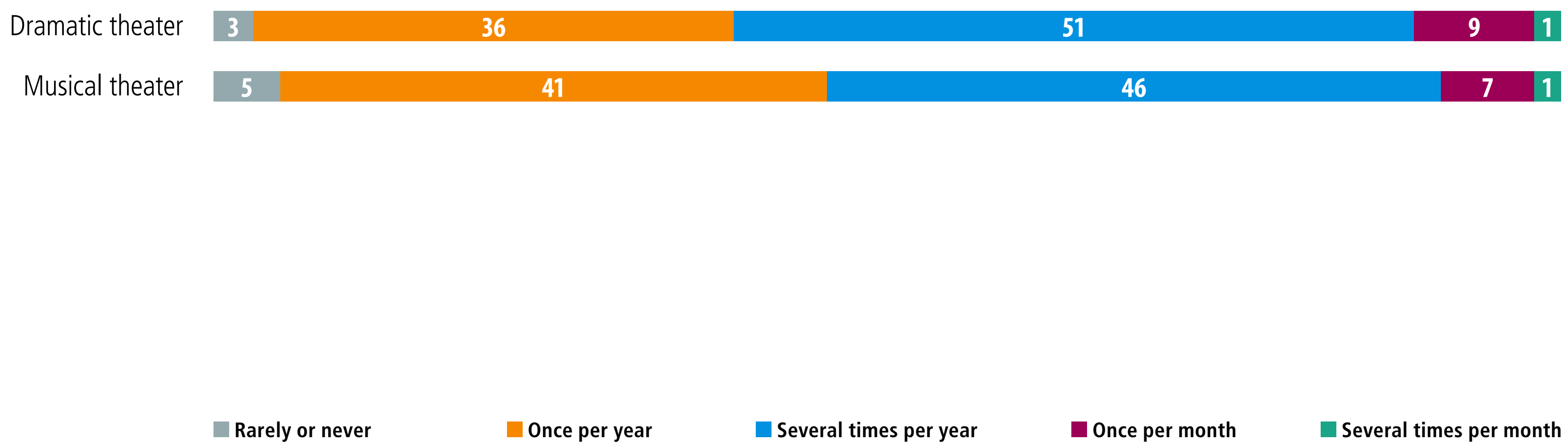
"Museum Mavens" top cultural activities
(n=395), units: %



- "Museums Mavens" visit all variety of museums with high frequency—especially historic attractions—and are among the most dedicated art exhibition and gallery patrons of any of the segments.

Each segment has distinct participation patterns.

"Devoted Theater-Goers" top cultural activities
(n=364), units: %

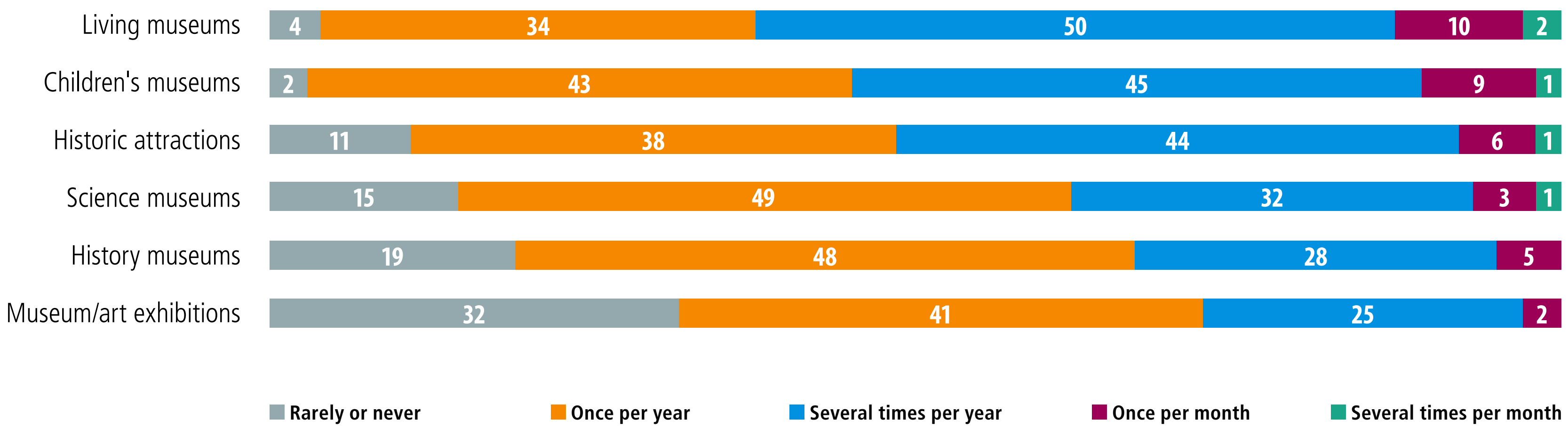


- "Devoted Theater-Goers" attend live drama and musicals with extremely high frequency: 10% attend dramatic theater productions at least once per month, and over 60% attend several times a year.

Each segment has distinct participation patterns.

"Family-Centric"
top cultural activities
(n=364), units: %

- "Family-Centric" segment members are most likely to visit living museums, children's museums, historic attractions, science and history museums, and art museums.

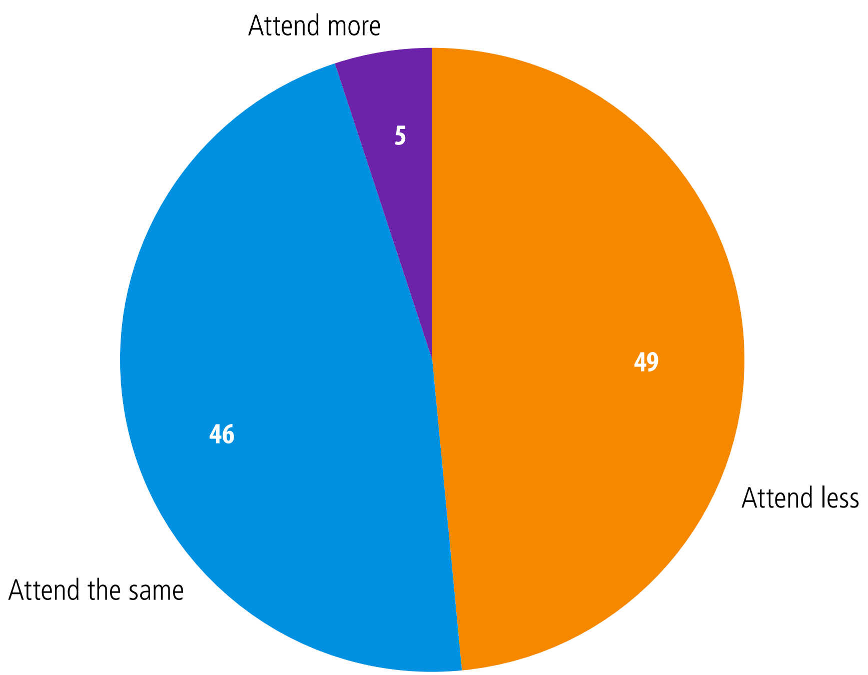


What Role Has the Economy Played?

Blame the economy.

Economic impact on cultural participation

(n=4,005), units: %



- Combined, those who say they are attending cultural events at the same or greater level in the new economy represent 51% of the total respondents.
- This means that almost half, or 49%, of respondents say they have decreased their attendance because of the economy.

Participation has not lived up to expectations.

Expected change
units: %

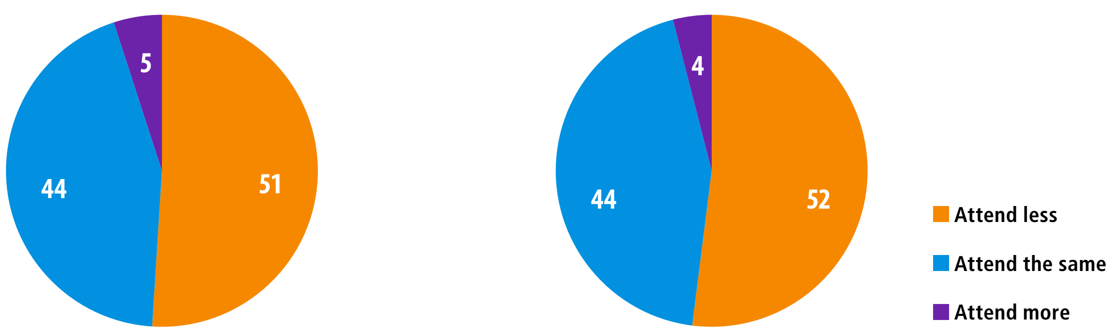
Performing arts 2009
(n=1,248)

Visual arts 2009
(n=1,248)

Actual change
units: %

Performing arts 2011
(n=1,558)

Visual arts 2011
(n=2,661)



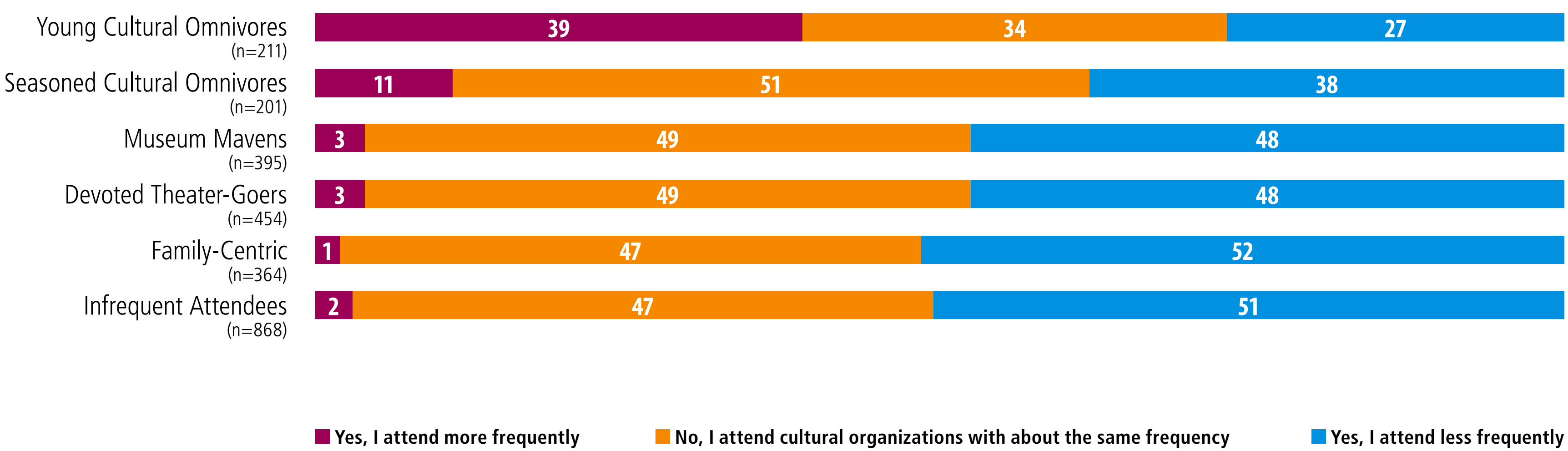
- In 2009, respondents did not think the economy would have a significant impact on their cultural participation in the next six months.
  - Just 7% of respondents expected they would decrease their performing arts attendance, and only 6% expected they would decrease their visual arts participation.
- In 2011, these mild expectations proved premature.
  - 51% of performing arts attendees and 52% of visual arts attendees say they have decreased their attendance because of the economy.

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

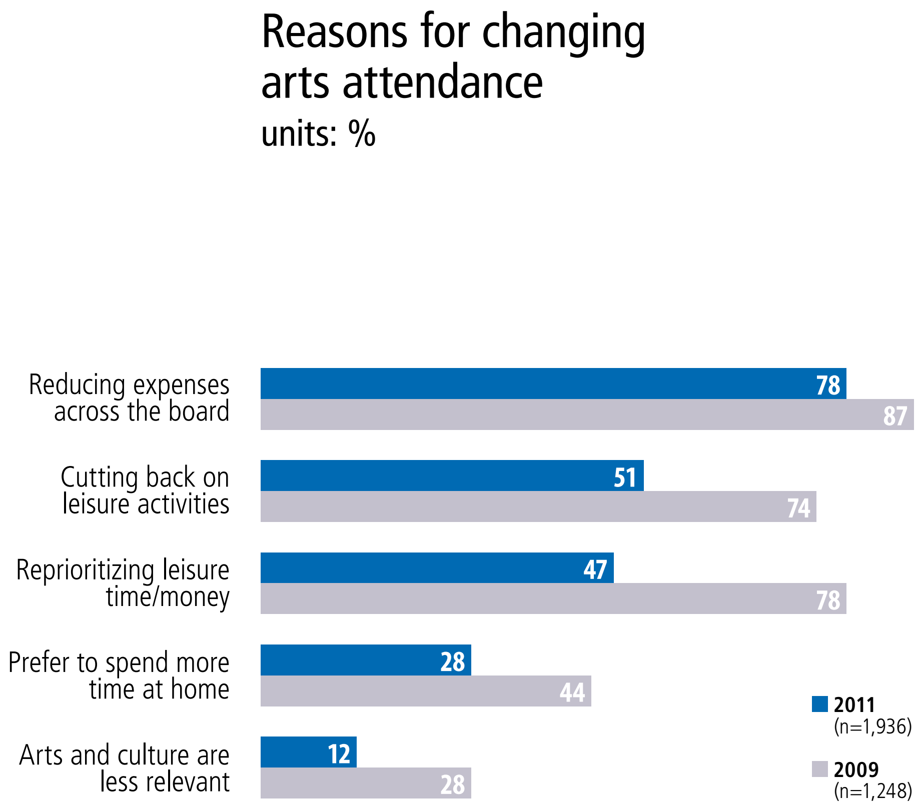
Shift in attendance

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."



Signs of hope: fewer are cutting back while more find relevance.



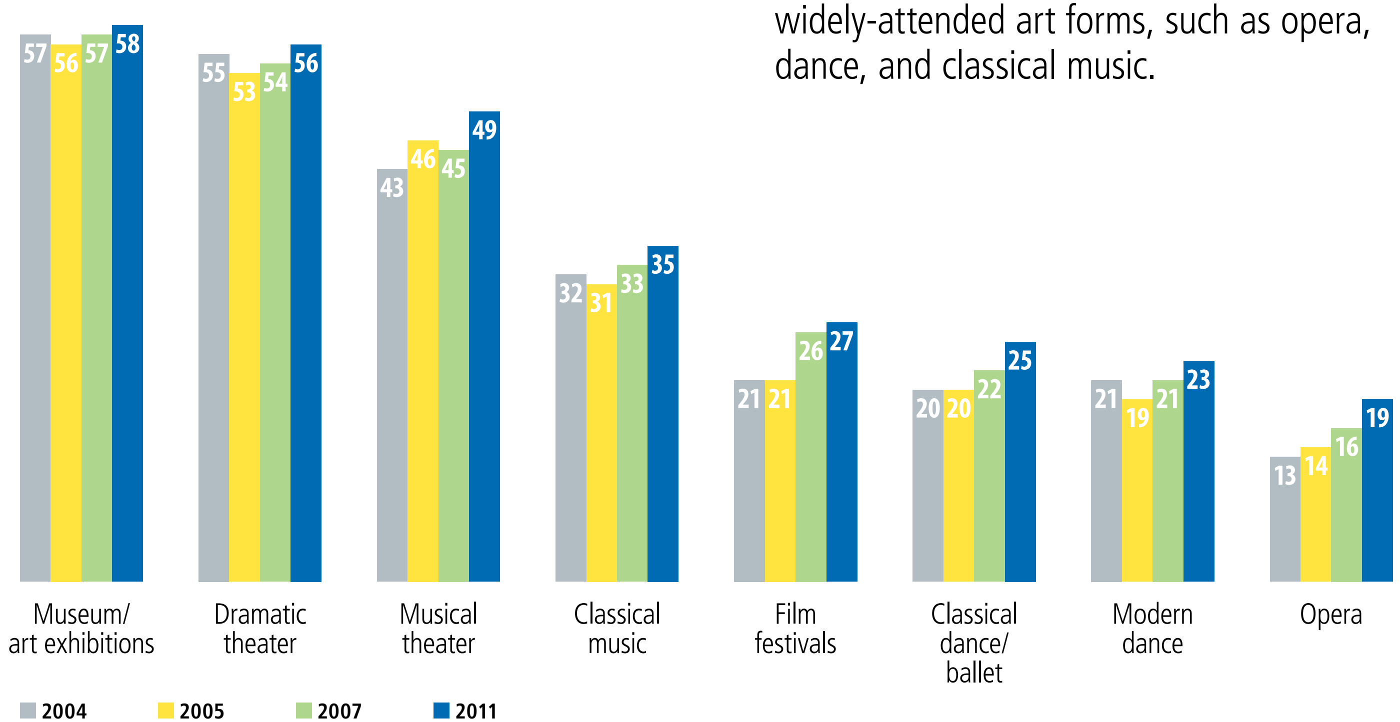
- Though many respondents continue to trim expenses (78%) and reprioritize (47%) during a prolonged period of economic uncertainty, fewer are cutting back than in 2009.
  - This suggests that household budget concerns are stabilizing and that people have grown accustomed to the current economic climate.
- Significantly fewer respondents see culture as "less relevant" to their lives in 2011 versus 2009.
  - In 2011, only 12% of respondents cut back on culture, feeling that it was less relevant to their lives, compared to 28% in 2009.

Where Is the Cultural Market Today?

Participation patterns by art form remain steady.

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

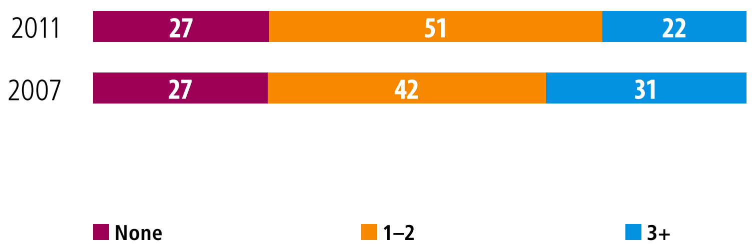
(n=4,005), units: %



- "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 even to less widely-attended 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: %

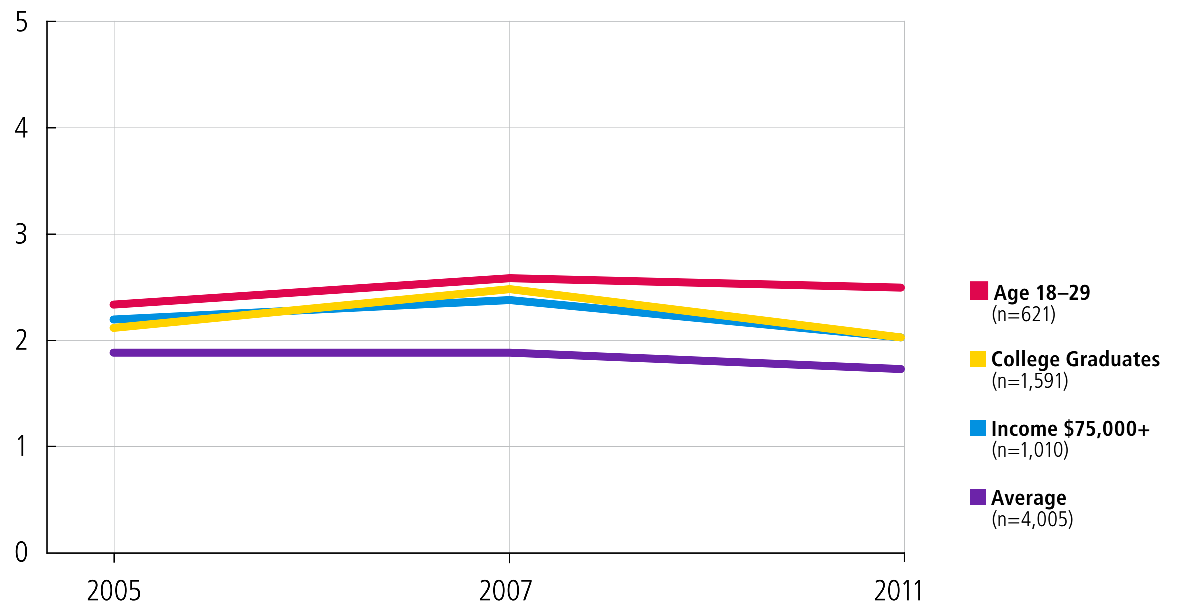


- Cultural consumers are still participating, but they are just participating less frequently.
- The ranks of the most frequent attendees—those who attend 3+ cultural events a month—have declined by almost one-third: 22% in 2011 versus 31% in 2007.
- Across the board, respondents are attending fewer 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.

Even the most active demographic segments are participating less often.

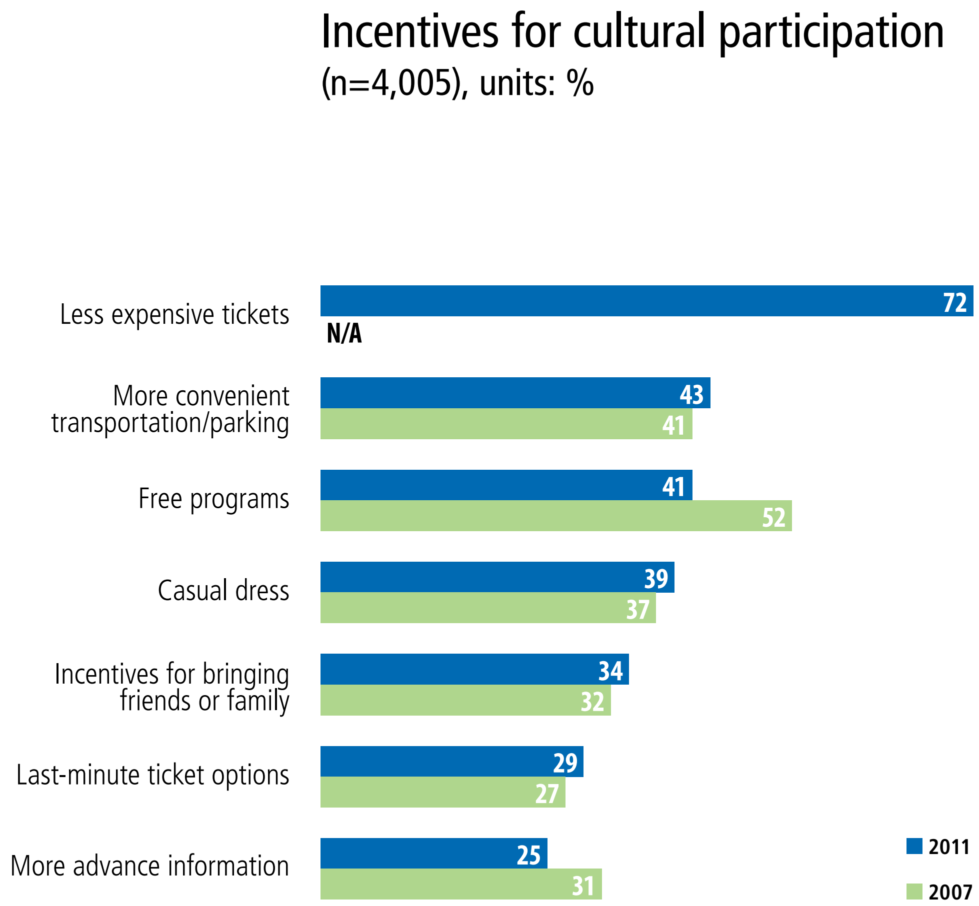
Average number of cultural events attended per month, by audience group

- As in years past, above-average frequency of attendance correlates with education, age, and income.
- Frequency of participation in 2011 is similar to that of 2005, after an increase in 2007.
- This shift in frequency of attendance can be seen across all groups.



What Motivates Cultural Audiences?

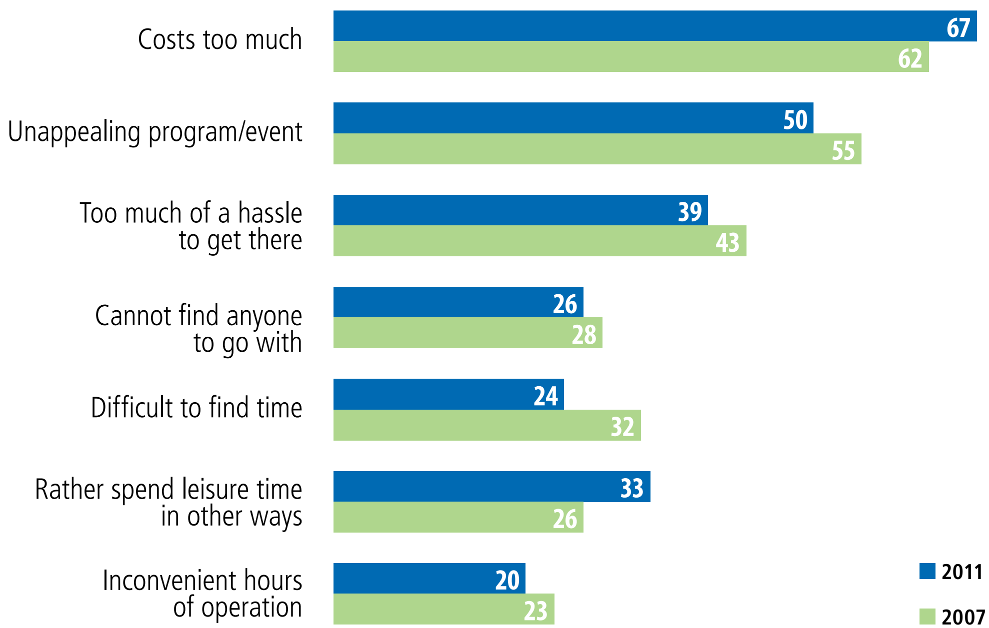
Incentives to cultural participation: cost, connection, and convenience.



- 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.

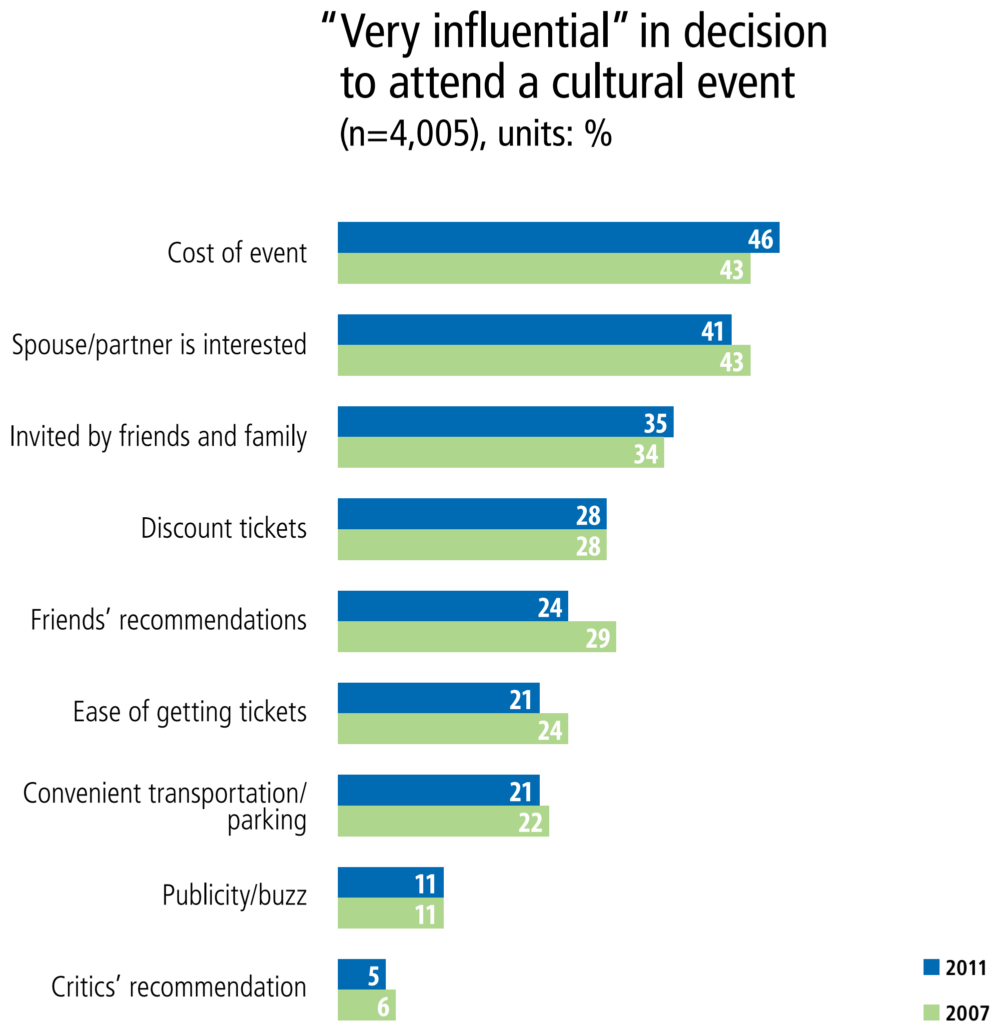
Barriers focus on content, convenience, and competition.

Barriers to attending cultural events
(n=4,005), units: %



- 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."

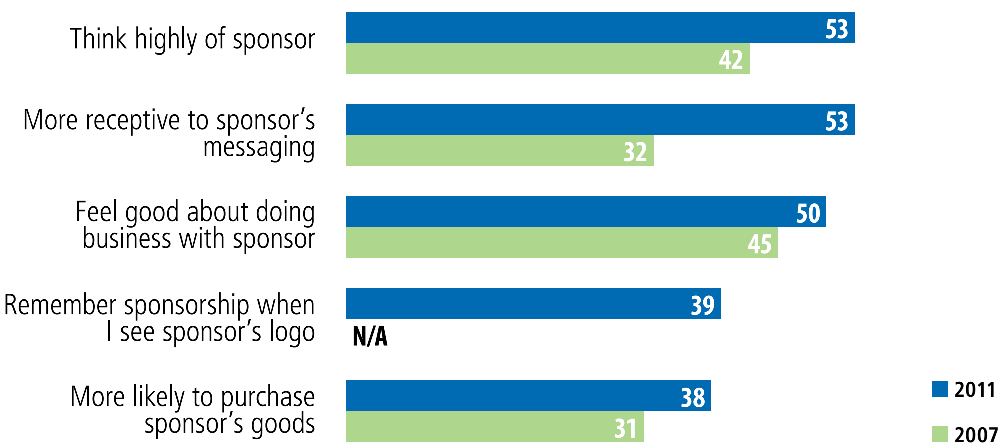
After cost, social factors dominate decision-making.



- 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%).

Cultural sponsorship is more compelling than ever.

"Agree" that corporate sponsorship of the arts makes me . . .
(n=4,005), units: %

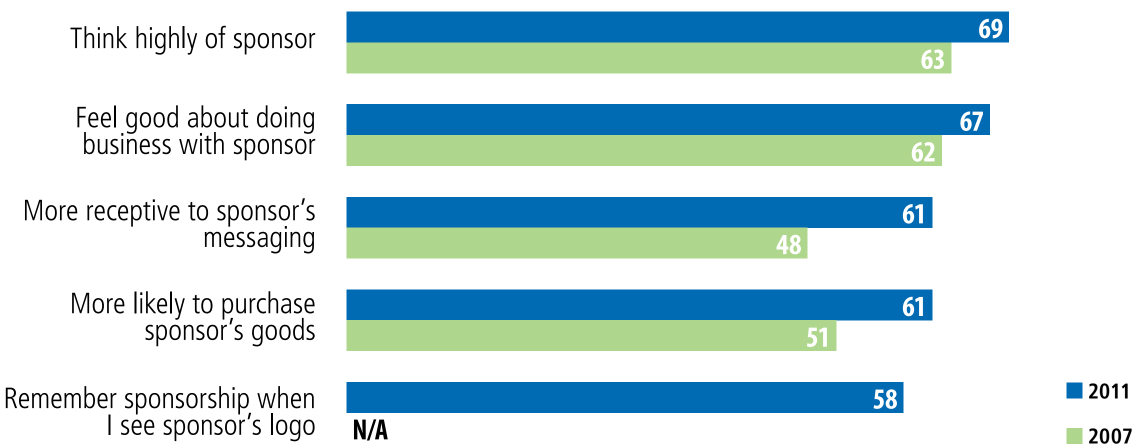


- Almost 40% of all respondents reported they were likely to purchase goods or services from corporations that support the arts, up from 31% in 2007.
- Respondents are also growing much more receptive to messaging from cultural sponsors: 53% in 2011 versus 32% in 2007.

Frequent attendees value cultural sponsorship most.

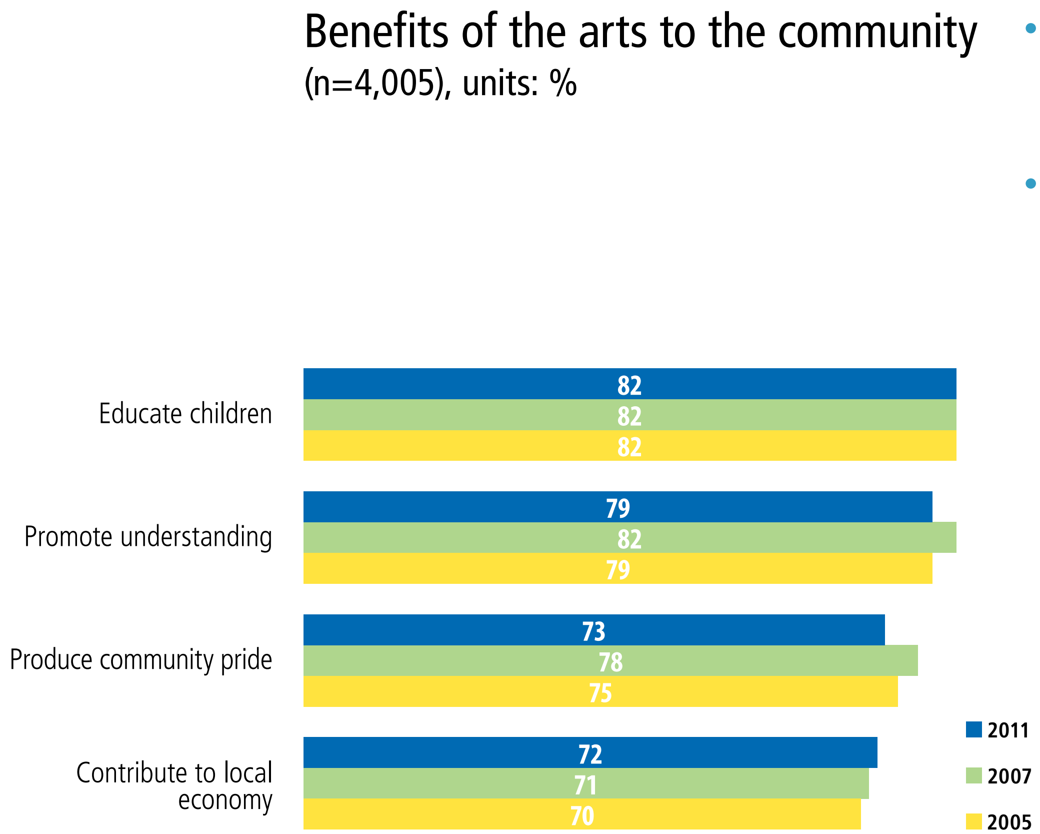
“Agree” that corporate sponsorship of the arts makes me . . . (frequent attendees)

(n=532), units: %



- Frequent attendees—who tend to be more educated, with higher incomes—are the most supportive of corporate sponsorship.
  - 61% of frequent attendees say they are more likely to make purchases from corporations that support the arts.
  - Almost 7 out of 10 (69%) “think highly of corporations that support the arts.”

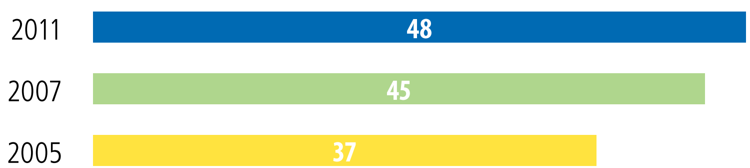
Learning and community are still primary benefits.



- Most respondents continue to identify educational benefits as the most important benefits of arts and culture.
- Community impact follows closely. Arts organizations are seen as "good neighbors" who improve the local economy (72%) and provide a focal point for community pride (73%).

Learning and community are still primary benefits.

“Agree” that most arts organizations are child-friendly
(n=1,632), units: %

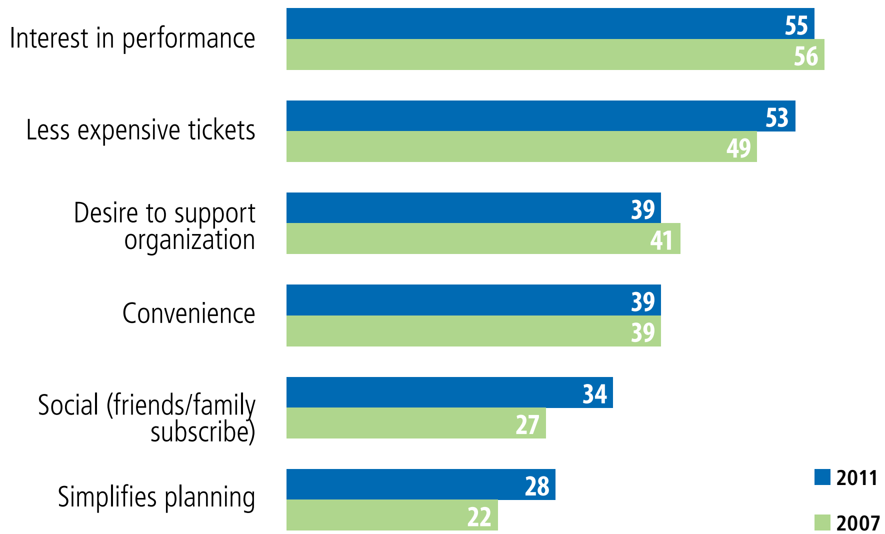


- Among respondents with children at home, slight gains are being made in perceptions of arts organizations as being child-friendly (48% now agree).
- However, over half of these respondents do NOT agree that “most arts organizations are child-friendly.”

A Closer Look: Participation in the Visual and Performing Arts

For performing arts subscriptions, the show comes first.

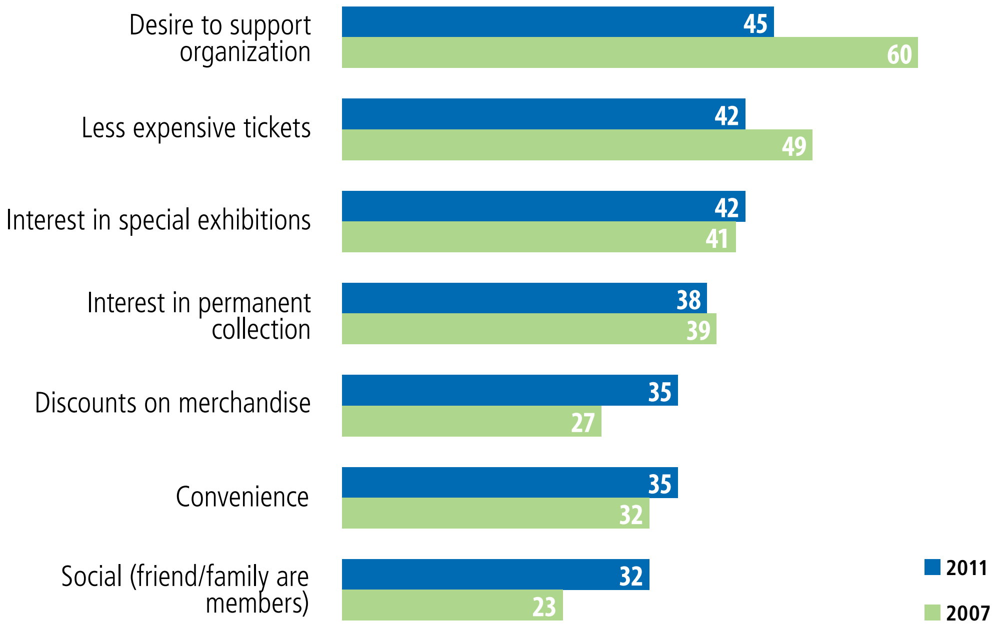
Subscription influencers
(n=694), units: %



- 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%).

For visual arts memberships, affiliation still leads—but barely.

Membership purchase influencers
(n=670), units: %



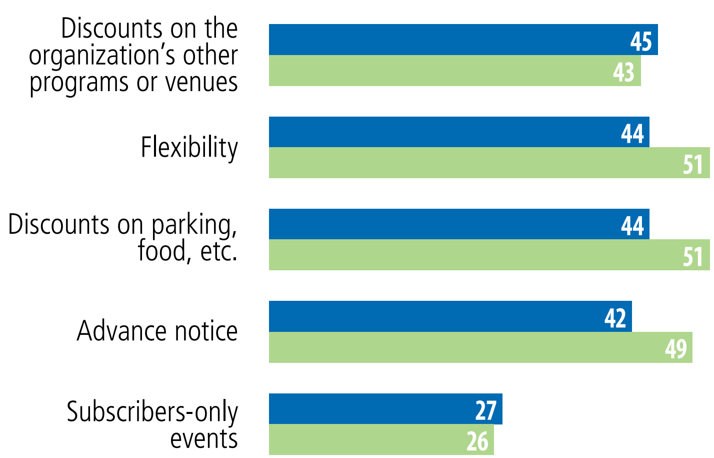
- Affiliation remains the most compelling factor for purchasing museum memberships (45%) versus performing arts subscriptions (39%).
- However, value is an increasingly crucial factor in museum membership purchases.
  - The difference between affiliation and value as influencers has shrunk to 3% in 2011 from 11% in 2007.

It's about convenience, not exclusivity.

- Exclusive subscribers-/members-only events are not major incentives for subscription (27%) or membership (40%) purchases.
- Instead, flexible memberships, deals, and convenient ticket exchanges are attractive to potential members and subscribers.

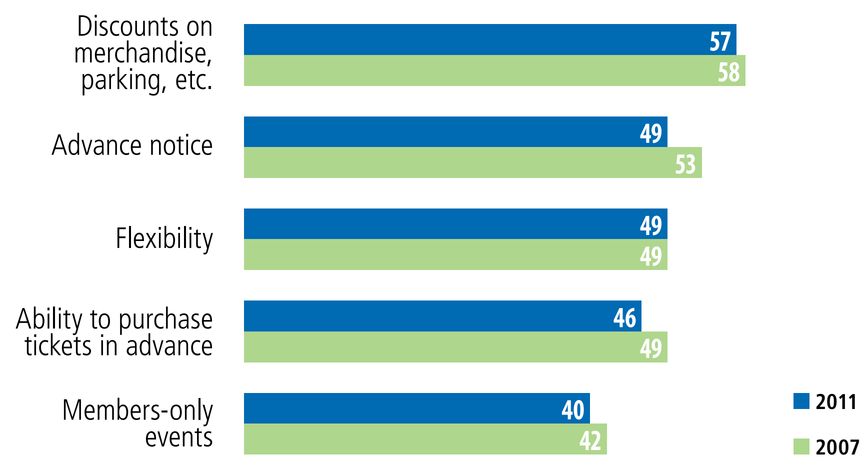
Performing arts subscription incentives

(n=694), units: %

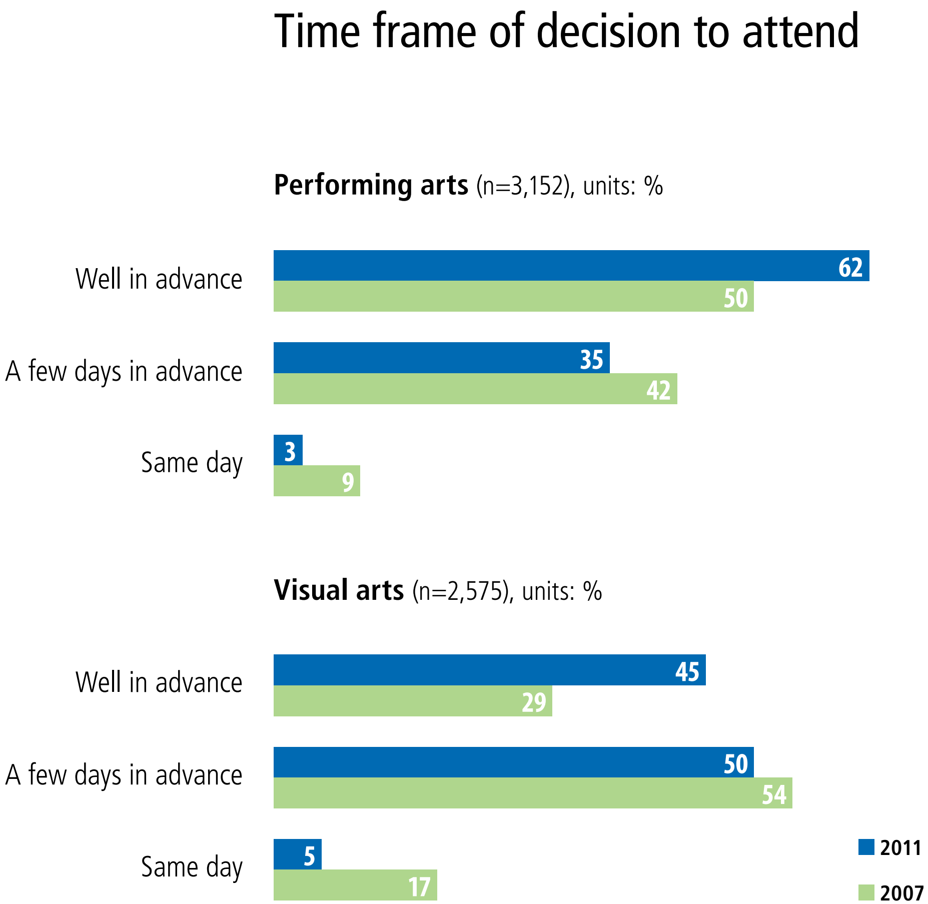


Visual arts membership incentives

(n=670), units: %



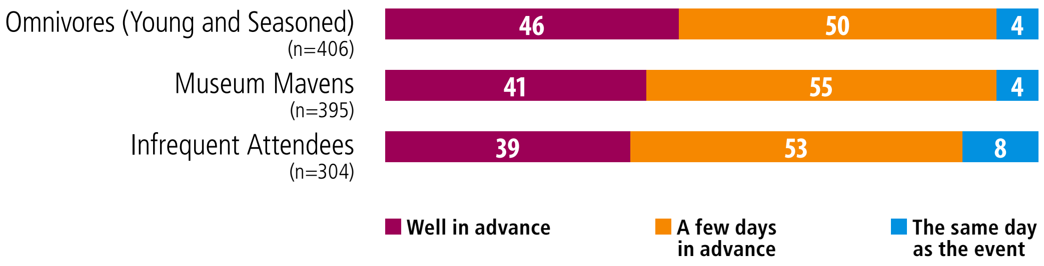
On the whole, advance planning is on the rise.



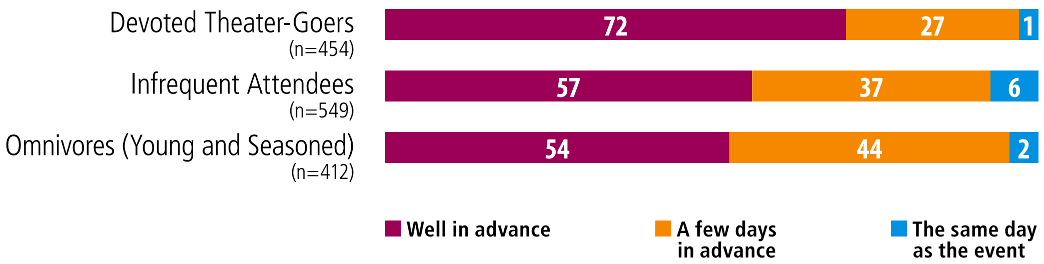
- Both visual and performing arts audiences have become significantly less spontaneous and are planning their attendance much farther in advance.
  - Only 5% of 2011 respondents visit a museum or exhibition on the same day they make the decision to attend, compared to 17% in 2007.
  - Just 3% of respondents attend a performing arts event on the same day of their decision, down from 9% in 2007.

Planning time frames vary among the segments.

Advance planning by segment–visual arts



Advance planning by segment–performing arts

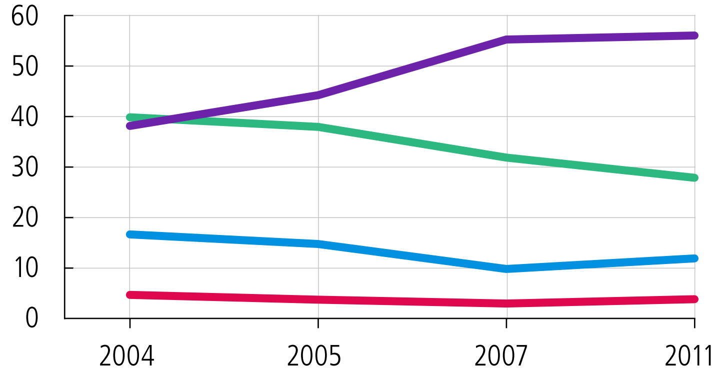


- "Devoted Theater-Goers" are more likely to plan well in advance for the performing arts (72%).
- While omnivores' planning time frames are comparable for the performing arts, "Seasoned Cultural Omnivores" are more inclined to plan their visit to a museum a few days in advance (54%).
- Similarly, "Museum Mavens" are much more likely to plan their visits to Museums a few days in advance (55%).

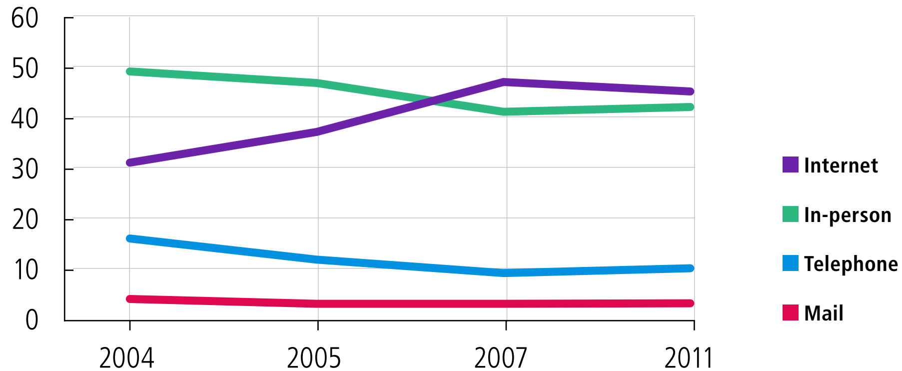
Online ticket sales dominate all other channels.

Preferred ticket purchase method

Performing arts (n=3,152), units: %



Visual arts (n=2,575), units: %

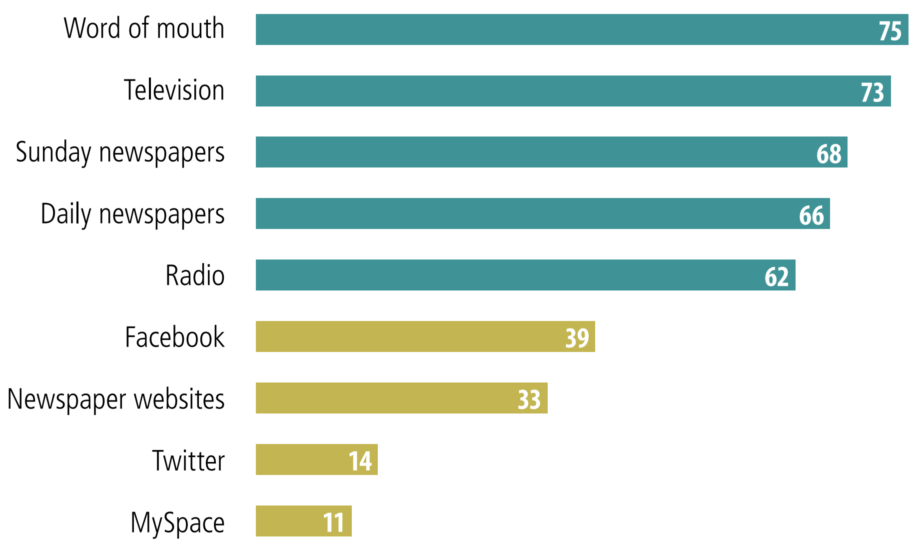


- Respondents of all ages prefer the Internet for purchasing tickets.
- In-person box office sales for performing arts continue to decline dramatically.
- For visual arts, online is top but closely followed by purchasing tickets at the admissions desk.

Creating Connections: Traditional Channels, Social Media, and New Technologies

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: %

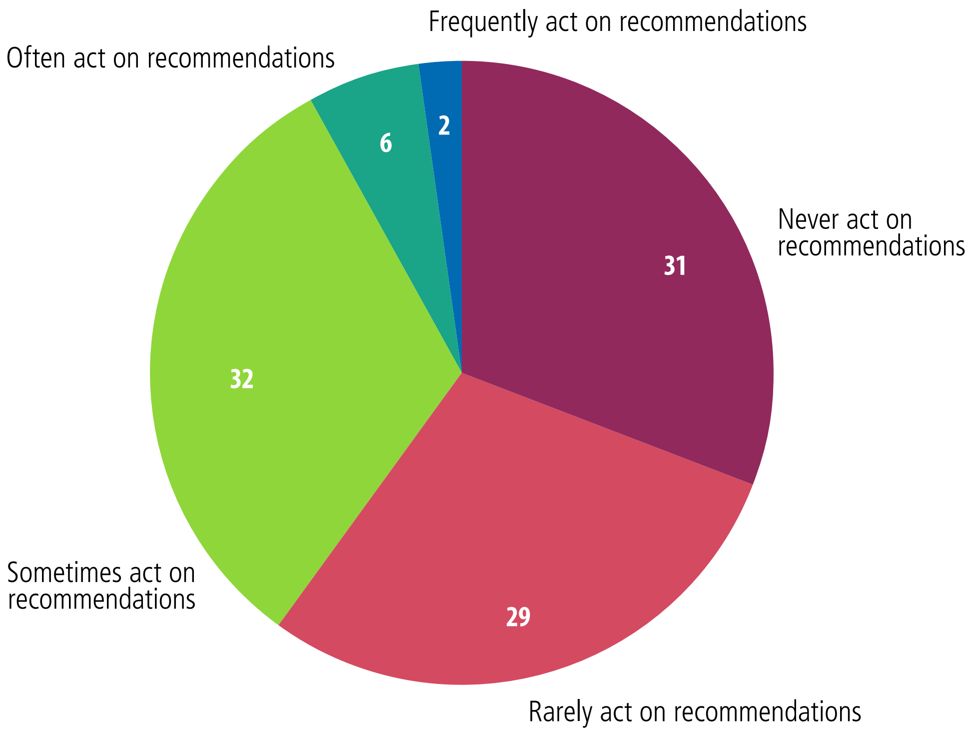


- Traditional media channels are still very important ways of sharing cultural information.
- Word of mouth (75%) has always been essential, but now it expresses itself both online and off.
- Social media is a new channel for word of mouth.
    - Appearing in this study for the first time, data on Facebook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

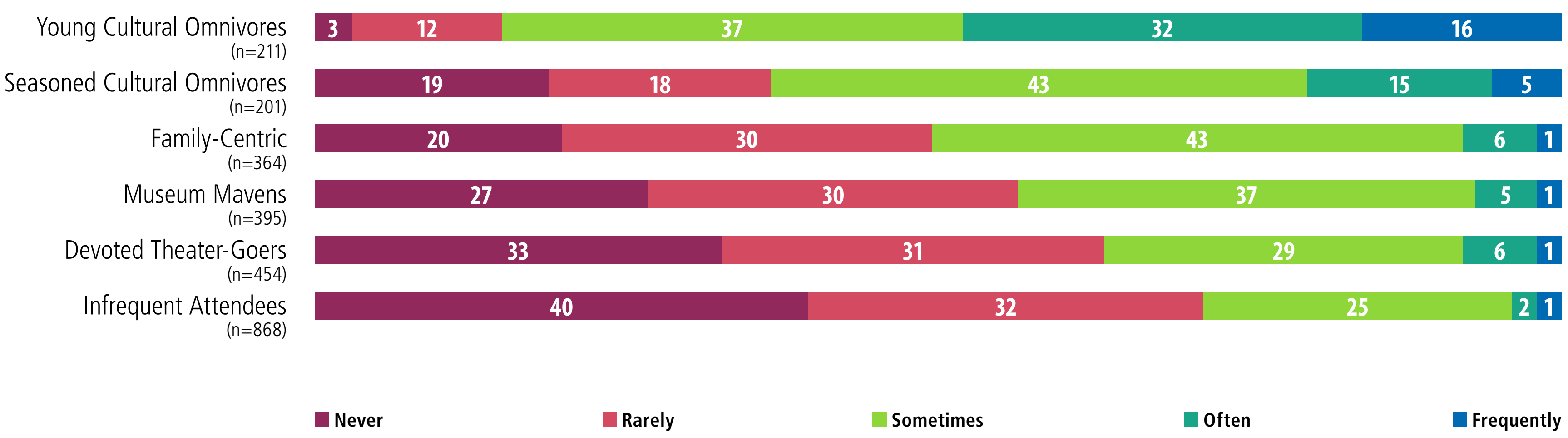


- Four out of ten of respondents sometimes, often, or frequently act on recommendations for cultural events received through social media.

Core cultural consumers are more influenced by social media.

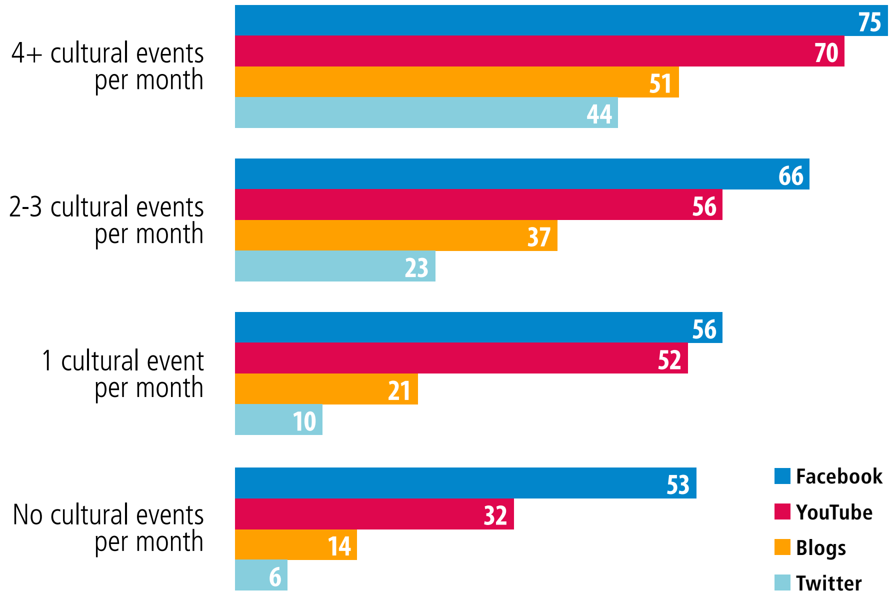
Likelihood of acting on social media recommendations
units: %

- The most engaged cultural audience segments are more likely to act on recommendations from online sources.



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

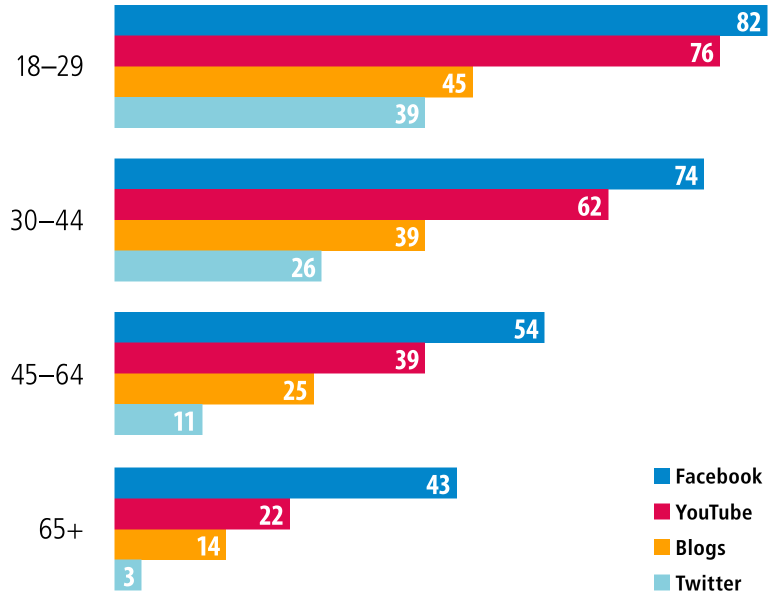
Social media usage as a function of attendance
(n=4,005), units: %



- 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.

Younger audiences are not the only ones using social media.

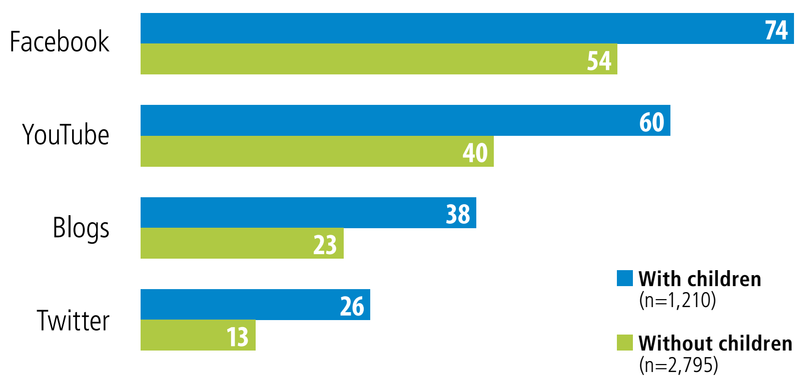
Social media usage as a function of generation
(n=4,005), units: %



- Although younger audiences are heavier users of social media, certain platforms, such as Facebook, are widely used across all generations.

Families are also heavy social media users.

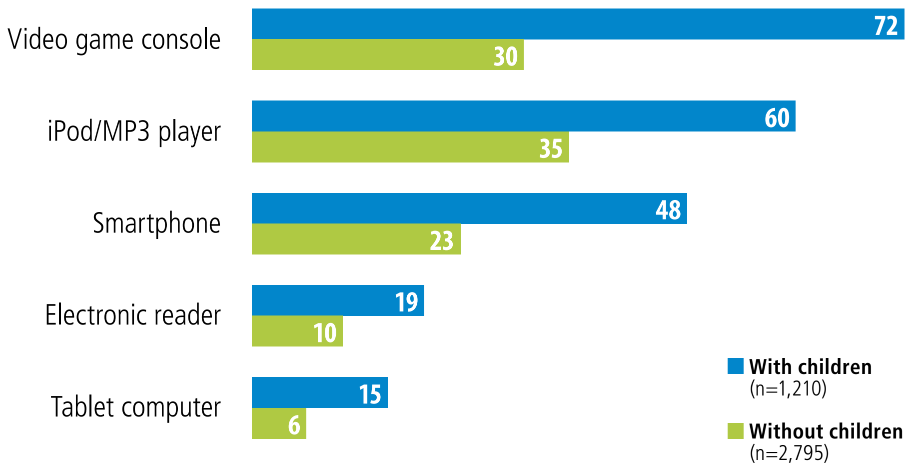
Social media usage in households with and without children



- Social media is used more frequently in households with children than in those without.
  - For example, 74% of households with children use Facebook on a weekly or daily basis, as opposed to 54% of households without children.

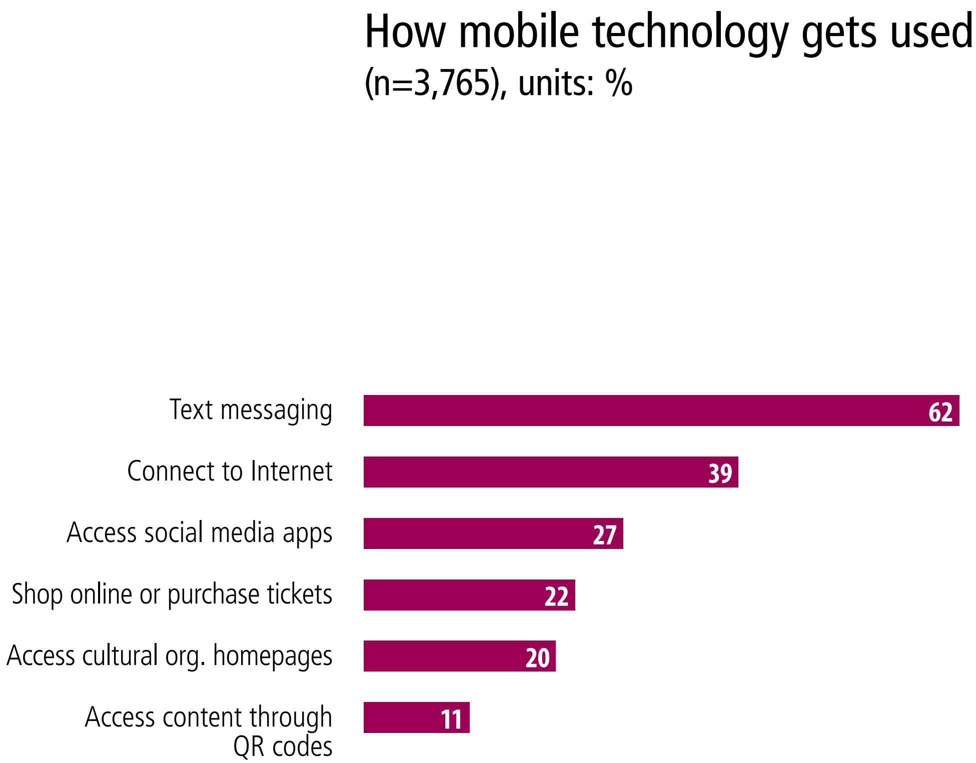
Families with children are technology omnivores.

Presence of technology by presence of children



- The presence of children in households correlates to high levels of multi-platform technology usage.
- Respondents with children are:
  - Nearly three times as likely to own a tablet computer.
  - Nearly twice as likely to have a smartphone.

Mobile technology is a gateway to cultural homepages.



- 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.

Implications: Cost, Content, Connection, and Convenience

10 Key Implications

- The most culturally active are two distinct groups, requiring two different approaches
- Overall participation is steady, but the ranks of the most culturally active are shrinking
- Economic impact: bigger than expected, but audiences are adapting
- Arts & culture remain relevant; learning and community are the drivers
- Corporate sponsorship is more compelling than ever
- Affiliation-based appeals still matter, but “value” is rising in importance
- Convenience and connection motivate cultural participation
- Word of mouth remains the #1 influencer, now supercharged through social media
- The most frequent attendees are also the most influenced by social media
- More than ever, the cultural experience begins on screen: computer and mobile

Thank you to the following organizations and individuals that made *Culture Track 2011* possible.

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