LaPlaca Cohen

CULTURE TRACK '14

LaPlaca Cohen

CULTURE TRACK '14

@LaPlacaCohen #culturetrack

What is Culture Track?

An Ongoing Study

2001 2003 2005

2008 2011 2014

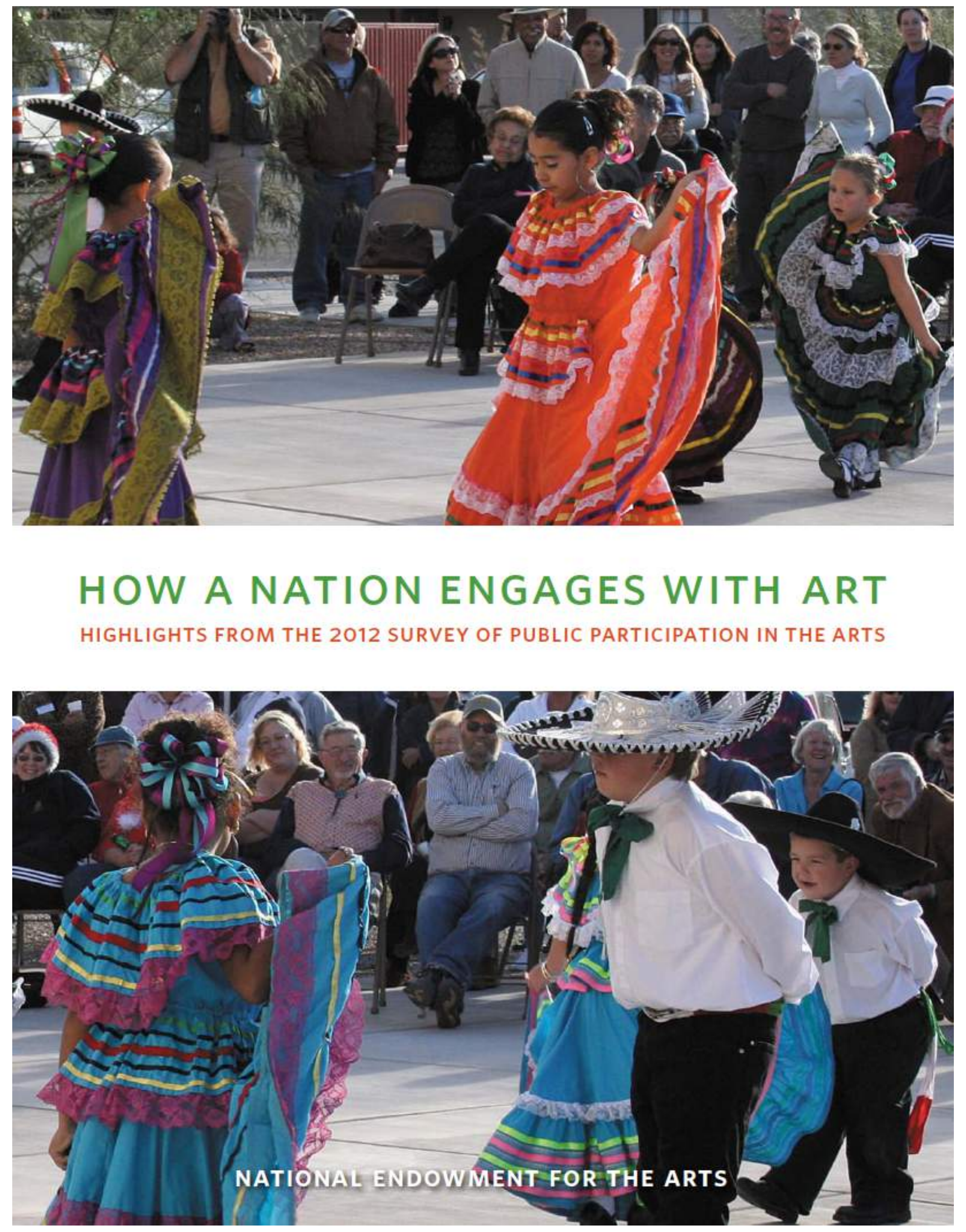
An Ongoing Study

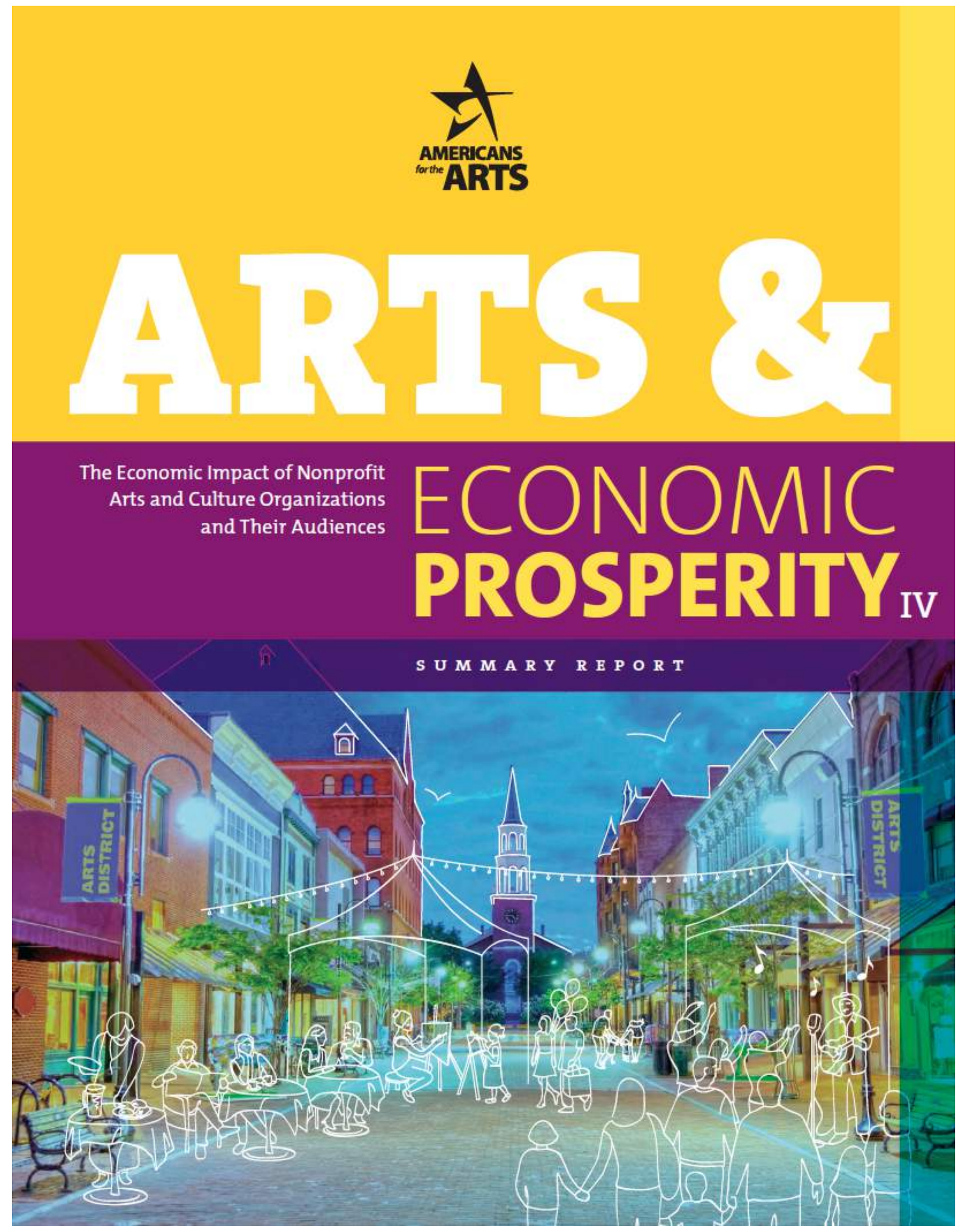
of the
Attitudes
Motivators
Barriers

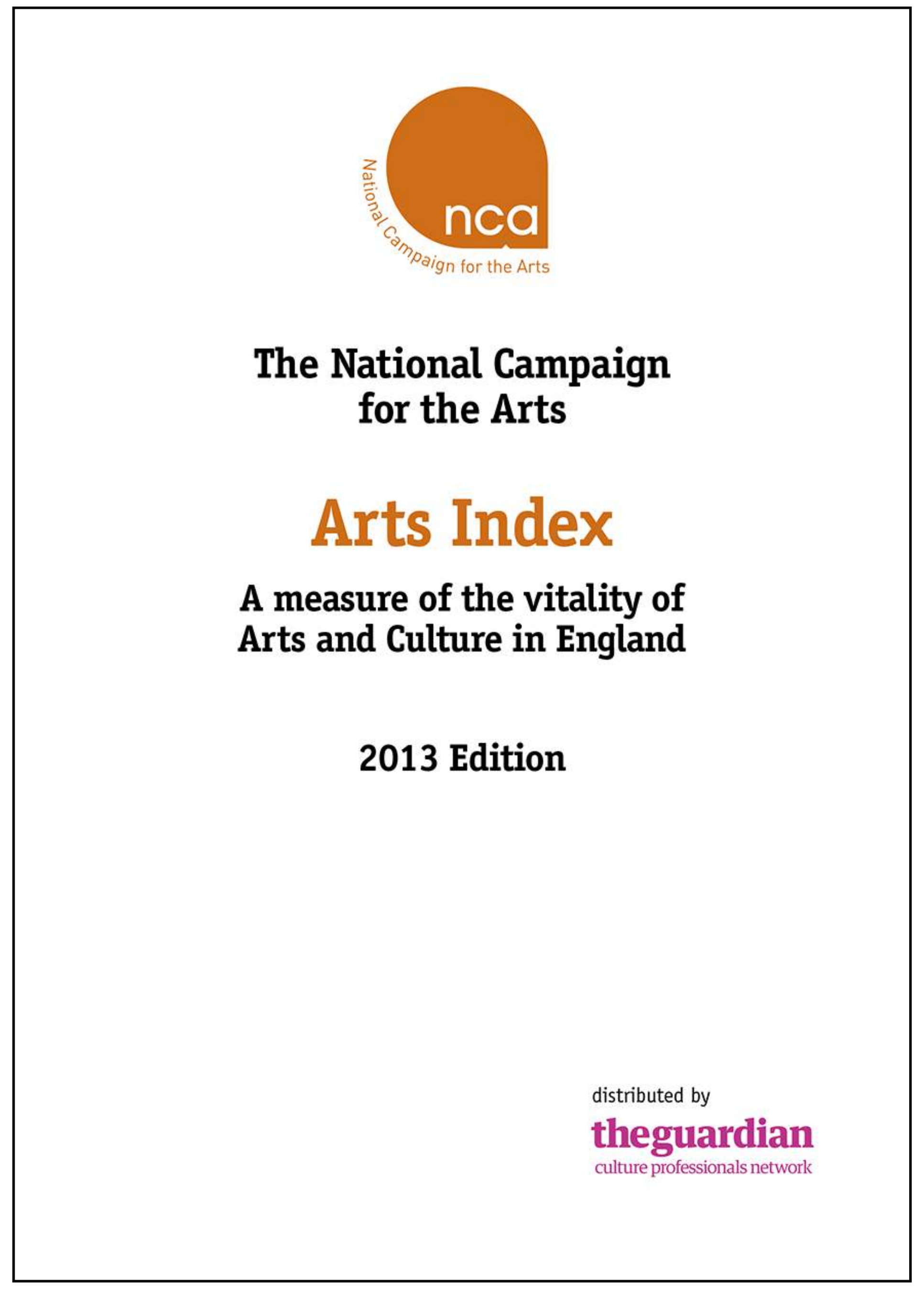
of
Culturally
active
audiences

Why Culture Track?

Build upon leading research studies







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

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

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

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

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
Photo by Carterhawk

food and drink experiences

64%

define as a cultural activity

73%

participate at least once per year

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

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 are the big barriers?

Cost, content and (in)convenience.

BARRIERS TO ATTENDING CULTURAL ACTIVITIES

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)

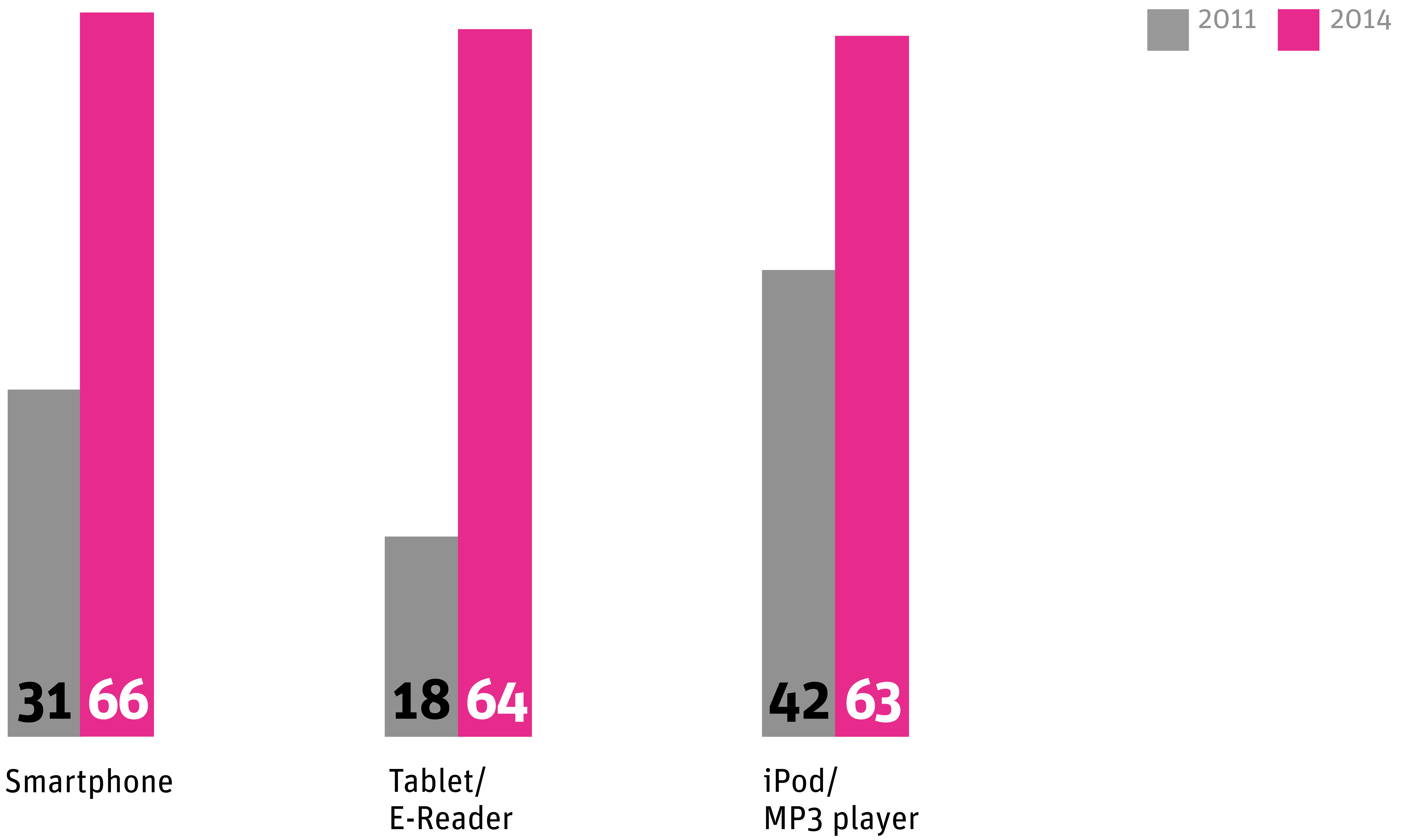
Not for me:
Over 3/4 of **P** re-Wars stay away if they feel the programming is not for them.

BARRIERS TO CULTURAL PARTICIPATION (BY GENERATION)

Technology & On-Site Experience

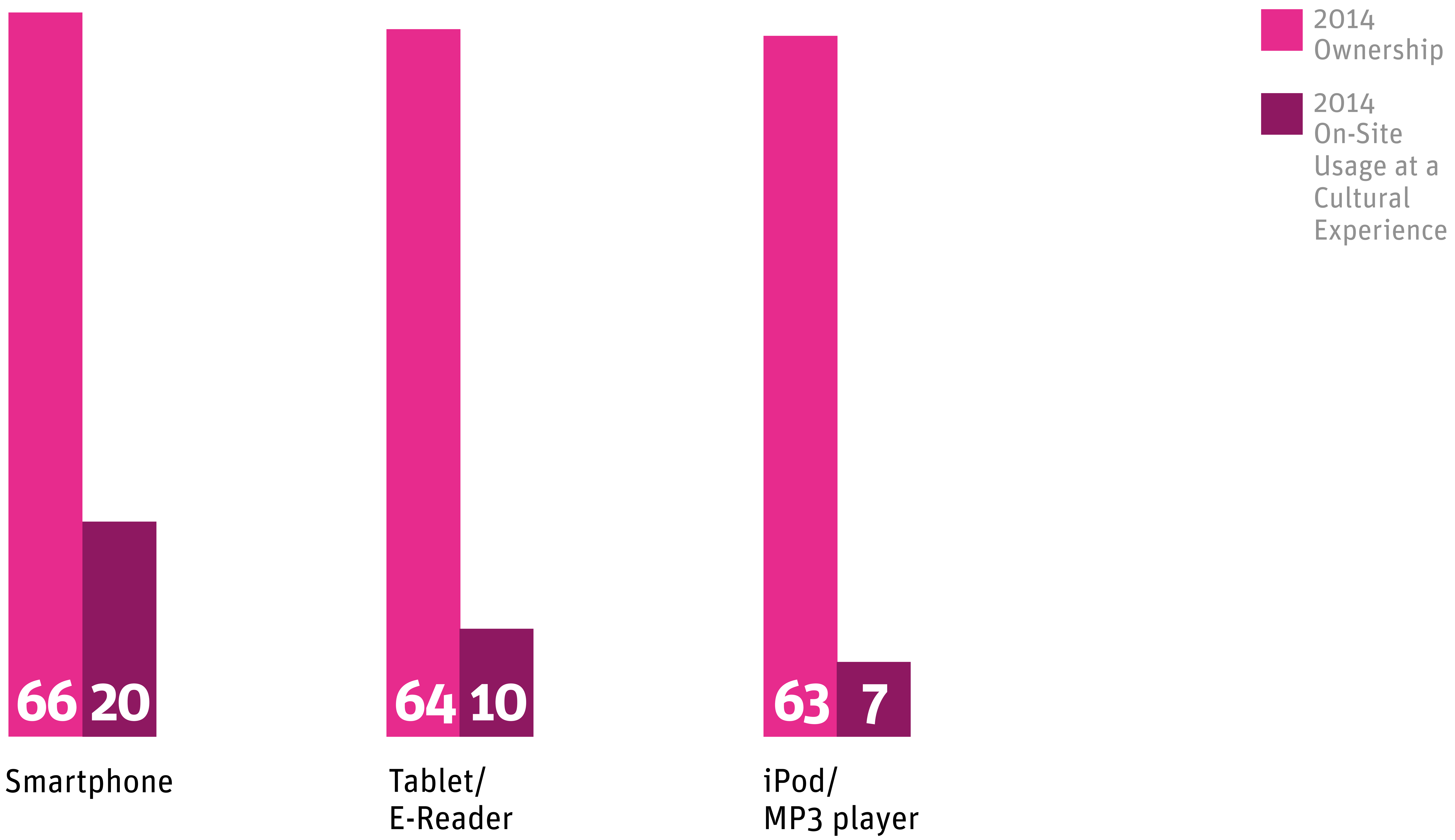
Ownership of mobile devices has skyrocketed since 2011.

OWNERSHIP OF MOBILE DEVICES



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

OWNERSHIP vs. ON-SITE USAGE OF MOBILE DEVICES



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)

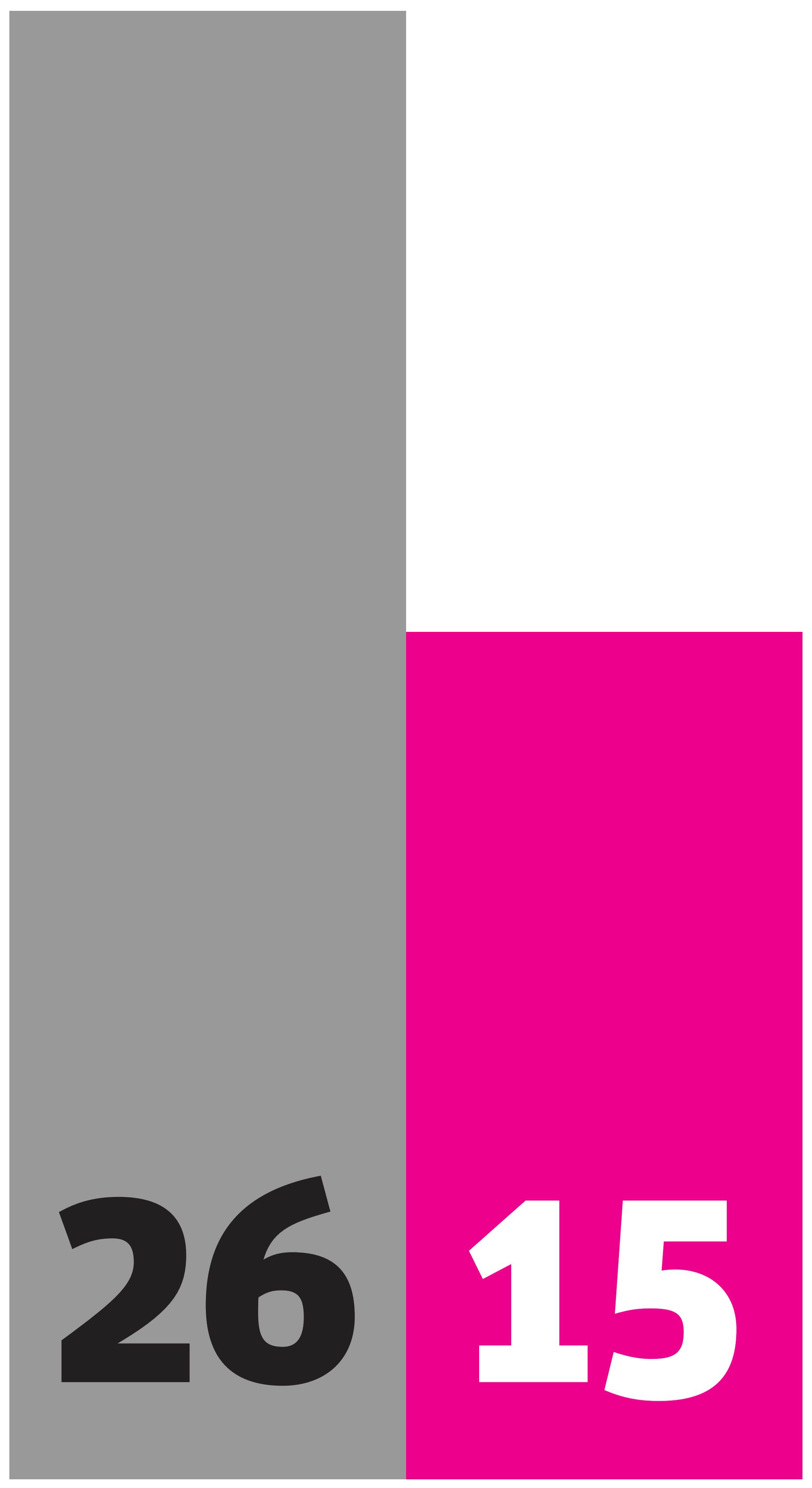
Audience Loyalty

Loyalty continues to decline.

VISUAL ARTS

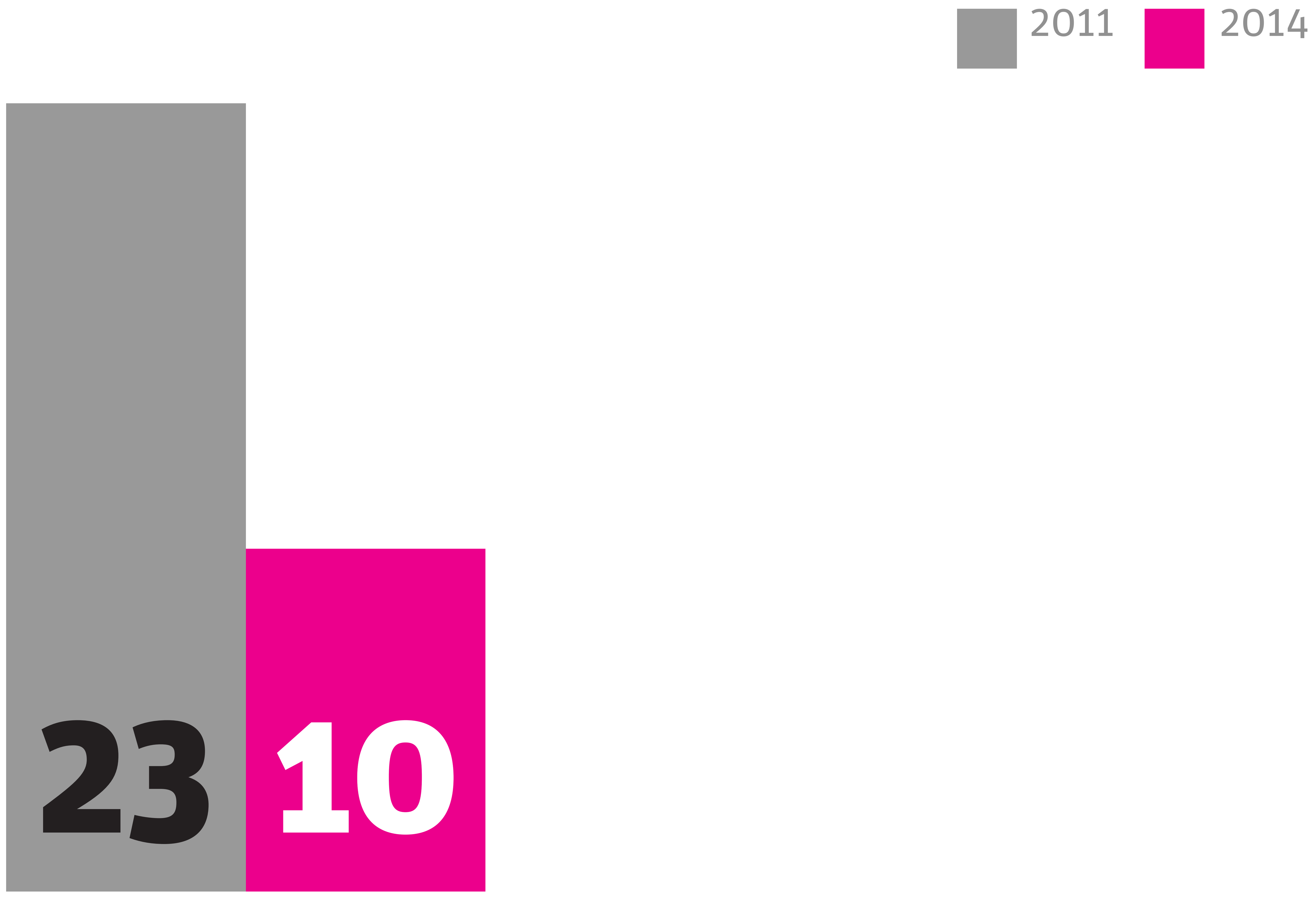
PERFORMING ARTS

VISUAL ARTS



% w/Memberships

PERFORMING ARTS



% w/Subscriptions

For visual arts membership, affinity and value matter most.

MOTIVATIONS TO PURCHASE VISUAL ARTS MEMBERSHIPS

MOTIVATIONS TO PURCHASE VISUAL ARTS MEMBERSHIPS

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

MOTIVATIONS TO PURCHASE PERFORMING ARTS SUBSCRIPTIONS

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

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

LaPlaca Cohen

CULTURE TRACK '14