CULTURE TRACK '14

SUPPORTING DATA

RESEARCH CONDUCTED BY

Campbell Rinker

LaPlaca Cohen
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ABOUT CULTURE TRACK

Culture Track is the largest 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. It has been fielded six times since 2001.

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

The 2014 edition of Culture Track arrives at a pivotal moment for cultural organizations nationwide. Audience behaviors and expectations are changing rapidly, driven by ever-multiplying and diversifying options for spending leisure time, and by technology developments that are fundamentally altering the way we interface with our world. The implications for cultural institutions are significant and, without close study, difficult to determine.

ABOUT THIS DOCUMENT

This document provides the comprehensive research conducted by Campbell Rinker, which served as the supporting data for Culture Track 2014. Selected findings from the comprehensive research are noted throughout.

The Top-Line Presentation by LaPlaca Cohen, which provides a more focused exploration of key insights from the data, can be downloaded at LaPlacaCohen.com/culturetrack.

Twitter: @LaPlacaCohen #culturetrack
LaPlaca Cohen worked in partnership with research firm Campbell Rinker to field Culture Track 2014. The study was conducted using a nationwide online survey with 4,026 respondents, representing all 50 states. Respondents were U.S. residents ages 18 or over who were double-confirmed for interest in cultural events and attendance to at least one cultural activity in the past year. The study defines cultural participation as attendance to a specific range of cultural activities, such as:

<table>
<thead>
<tr>
<th>MUSEUM / ART EXHIBITIONS</th>
<th>OPERA</th>
</tr>
</thead>
<tbody>
<tr>
<td>DRAMATIC THEATER</td>
<td>ZOOS</td>
</tr>
<tr>
<td>MUSICAL THEATER</td>
<td>BOTANICAL GARDENS</td>
</tr>
<tr>
<td>CLASSICAL MUSIC</td>
<td>AQUARIUMS</td>
</tr>
<tr>
<td>FILM FESTIVALS</td>
<td>SCIENCE MUSEUMS</td>
</tr>
<tr>
<td>CLASSICAL DANCE / BALLET</td>
<td>HISTORY MUSEUMS</td>
</tr>
<tr>
<td>MODERN DANCE</td>
<td></td>
</tr>
</tbody>
</table>

Culture Track 2014 has a ±1.6% margin of error at the 95% confidence level.

Throughout the report, there are instances where responses are broken out by generational differences.

The age ranges for the generations are defined as:

**MILLENNIALS**: 18 TO 29
**GEN X**: 30 TO 49
**BOOMERS**: 50 TO 69
**PRE-WAR**: 70+
1. PERCEPTIONS OF CULTURAL ORGANIZATIONS
1. PERCEPTIONS OF CULTURAL ORGANIZATIONS

1.1 ROLE OF CULTURAL ORGANIZATIONS: OVERALL TRENDS

Question: In your opinion, what are the roles of cultural organizations and activities?

Selected Findings:

- Respondents indicate that the main roles of cultural organizations are to educate, entertain, foster appreciation, and preserve the arts.

- To a much lesser degree, four to five respondents out of ten indicate that the roles of arts organizations include encouraging self-discovery, contributing to the greater good of society or the local economy, and serving as a meeting place for like-minded individuals.

- Compared to 2011 respondents, 2014 respondents are more likely to indicate that the role of arts organizations is to foster appreciation of the arts (76% in 2014 vs. 63% in 2011). 2014 respondents are also more likely to indicate that providing entertainment is one of the roles of arts organizations (80% in 2014 vs. 74% in 2011).

Note: In instances where 2011 data is not shown, those options were newly introduced in 2014.
1. PERCEPTIONS OF CULTURAL ORGANIZATIONS

1.2 ROLE OF CULTURAL ORGANIZATIONS: BY GENERATION

Question: In your opinion, what are the roles of cultural organizations and activities?

Selected Findings:

- Older generations (Boomers, Pre-War) are more inclined to choose traditional roles for cultural organizations, such as fostering appreciation of the arts and conservation and caretaking.

- Younger generations (Millennials and Gen X) are more likely to see cultural organizations as places where they can meet like-minded individuals, engage in self-discovery, and learn about other cultures or perspectives.

Note: Only the responses with significant generational differences are shown.
2. PARTICIPATION PATTERNS
2. PARTICIPATION PATTERNS

2.1 PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR

Question: Which of the following activities do you participate in at least once per year?

(Continued on following page)
2. PARTICIPATION PATTERNS

2.1 PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR (CONT’D)

Selected Findings:

• Since 2011, the percentage of individuals who participate in cultural activities at least once per year has marginally increased, with a few exceptions.

• One possible reason for the dip in interest for children’s museums is that fewer culturally-engaged participants in the 2014 edition have young children (25% vs. 30% in 2011); taking this into account, the trend is actually stable.

• Interestingly, visitation to science museums increased despite the fact that fewer of the 2014 respondents have children, which could indicate that those museums are doing a better job of appealing to visitors of all ages.

• The increases for participation in jazz and classical music might be attributed to broader definitions of what constitutes those genres, as well as increased opportunities to “participate” at home (i.e. streaming, radio).

• Though the economy has had a diminishing impact on overall participation patterns (see page 12), dramatic theater, classical dance, and opera may still be seeing decline in participation due to cost considerations. Additionally, the closure of many smaller opera companies across the U.S. may be a contributing factor.
2. PARTICIPATION PATTERNS

2.2 NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH: OVERALL TRENDS

Question: In a typical month, how many cultural events do you attend?

Selected Findings:

- Although respondents are attending a wider variety of cultural activities, the proportion of culturally-engaged audiences who attend three or more cultural events monthly has steadily decreased since 2007.
2. PARTICIPATION PATTERNS

2.3 NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH: BY GENERATION

Question: In a typical month, how many cultural events do you attend?

<table>
<thead>
<tr>
<th>None</th>
<th>1 to 2 Events</th>
<th>3+ Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials (n=680)</td>
<td>Gen X (n=1203)</td>
<td>Boomers (n=1803)</td>
</tr>
<tr>
<td>24%</td>
<td>29%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Selected Findings:

- In terms of generational differences, Boomers are less likely than the other generations to attend any event in a typical month, despite the fact that they are arguably the group with the highest disposable income.

- Millennial respondents are the most likely to attend 3 or more events in a typical month.
2. PARTICIPATION PATTERNS

2.4 AVERAGE NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH: BY GENERATION

Question: In a typical month, how many cultural events do you attend?

- **Millennials (n=680)**: 1.75 events/month
- **Gen X (n=1203)**: 1.41 events/month
- **Boomers (n=1803)**: 1.36 events/month
- **Pre-War (n=340)**: 1.67 events/month

Selected Findings:

- Millennials and Pre-Wars are the most culturally active generations.
2. PARTICIPATION PATTERNS

2.5 IMPACT OF THE ECONOMY ON CULTURAL PARTICIPATION

Question: Has the economy affected your visitation to cultural organizations?

Selected Findings:

• Though the economy continues to influence respondents’ cultural participation, its impact has diminished since 2011.

• Almost three in five respondents (58%) say they attend cultural activities about the same amount as they did before, while two in five (40%) say they attend less. Compared to 2011, where half of the respondents were less likely to attend due to the economy, these proportions appear more favorable.

• Only two percent of respondents say they attend more frequently because of the economy.
2. PARTICIPATION PATTERNS

2.6 ECONOMIC REASONS FOR DECREASING CULTURAL PARTICIPATION

Question: If the economy has impacted your visitation to cultural organizations, please tell us how.

Selected Findings:

- Four in five respondents (82%) say they are reducing expenses across the board due to the economy.
- Half are cutting back specifically on leisure activities (51%) and reprioritizing how they spend their leisure time and money (51%).
- One in five respondents (20%) are experiencing culture in alternative ways (such as online access) a new response option for 2014.

Note: Experience culture in alternative ways was a newly introduced option in 2014.
3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES
3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.1 PRINT AND BROADCAST SOURCES FOR CULTURAL ACTIVITIES: OVERALL TRENDS

Question: Do you frequently learn about cultural activities from the following sources?

<table>
<thead>
<tr>
<th>Source</th>
<th>2011 (n=4005)</th>
<th>2014 (n=4026)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>Sunday newspaper</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Daily newspaper</td>
<td>37%</td>
<td>29%</td>
</tr>
<tr>
<td>Radio*</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Brochures</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>Regional magazines</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Specialty magazines</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>National magazines</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Podcasts</td>
<td>3%</td>
<td>0%</td>
</tr>
</tbody>
</table>

* 2014 combined multiple types of TV or Radio (i.e. Broadcast, Premium, etc.)

Selected Findings:

- Despite the decline in use of TV and newspapers, respondents still most frequently learn about cultural activities through those sources.

Note: Podcasts was a newly introduced option in 2014.
Selected Findings:

- For 2014, radio and television were broken out further into public radio vs. commercial radio and broadcast television vs. cable. The chart above displays the proportion of respondents who frequently learn about cultural activities through these sources.
3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.2 PRINT AND BROADCAST SOURCES FOR CULTURAL ACTIVITIES: BY GENERATION

Question: Do you frequently learn about cultural activities from the following sources?

Selected Findings:

- The largest generational fluctuations in usage of print and broadcast sources is in newspapers.

Note: Due to the low number of respondents that use podcasts to learn about cultural activities, generational differences were not statistically significant enough to report.
3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.3 ONLINE SOURCES FOR CULTURAL ACTIVITIES: OVERALL TRENDS

Question: Do you frequently learn about cultural activities from the following sources?

<table>
<thead>
<tr>
<th>Source</th>
<th>2011 (n=4005)</th>
<th>2014 (n=4026)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social media</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Email newsletters</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>Cultural organization websites</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Newspaper websites</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>Online magazines</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>Cultural organization blogs</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Personal blogs</td>
<td>8%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Selected Findings:

- Interestingly, social media ranks relatively low in comparison to print and broadcast sources, with 1 in 5 respondents frequently learning about cultural activities that way. Given that a high proportion of respondents are on social media platforms (see page 21), social media is likely in a transitional moment, and may converge with traditional information sources in the coming years.

- Use of email newsletters, newspaper websites and personal blogs as information sources of cultural activities have decreased slightly.
3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.4 ONLINE SOURCES FOR CULTURAL ACTIVITIES: BY GENERATION

Question: Do you frequently learn about cultural activities from the following sources?

Selected Findings:

- Millennials are more likely to learn about cultural events through social media than any other source—including print and broadcast (see page 17).
3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.5 ONLINE SOURCES FOR CULTURAL ACTIVITIES:
BY FREQUENCY OF ATTENDANCE

Question: Do you frequently learn about cultural activities from the following sources?

Selected Findings:

- The more culturally active respondents are, the more likely they are to turn to online sources for information about cultural activities.

- A third of those who attend 3 or more events a month say that social media, cultural organization websites, and e-mail newsletters are frequent sources of information.
3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.6 USE OF SOCIAL MEDIA PLATFORMS: OVERALL TRENDS

Question: Please indicate whether you utilize the following social media platforms (whether you actively post or simply browse).

<table>
<thead>
<tr>
<th>Social Media Platform</th>
<th>2011 (n=4005)</th>
<th>2014 (n=4026)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>72</td>
<td>76</td>
</tr>
<tr>
<td>YouTube</td>
<td>69</td>
<td>71</td>
</tr>
<tr>
<td>Pinterest</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Twitter</td>
<td>27</td>
<td>30</td>
</tr>
<tr>
<td>Instagram</td>
<td>19</td>
<td>12</td>
</tr>
<tr>
<td>Tumblr</td>
<td>12</td>
<td>9</td>
</tr>
<tr>
<td>Snapchat</td>
<td>9</td>
<td>9</td>
</tr>
</tbody>
</table>

Selected Findings:

- Social media usage has increased slightly in 2014, but has largely remained stable.

Note: Pinterest, Instagram, Tumblr, Snapchat were newly introduced options in 2014.
3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.7 USE OF SOCIAL MEDIA PLATFORMS: BY GENERATION

Question: Please indicate whether you utilize the following social media platforms (whether you actively post or simply browse).

![Bar chart showing use of social media platforms by generation.]

(Continued on following page)
3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.7 USE OF SOCIAL MEDIA PLATFORMS: BY GENERATION (CONT’D)

Selected Findings:

• The use of social media platforms is largely driven by age. The younger the respondents, the more likely they are to use any of these platforms.

• However, Gen X, Boomers, and Pre-Wars are quite active on Facebook and YouTube as well.

• The cross-generational use of social media suggests that enormous potential for social media marketing exists—but cultural institutions have yet to “cut through the noise.”

• The sharp generational differences in cases like Instagram, Tumblr, and Snapchat illustrate the rapid adoption of newer social media platforms by younger generations.
4. MOTIVATORS AND BARRIERS TO PARTICIPATION
4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.1 REASONS TO MAKE CULTURE A PART OF ONE’S LIFE: OVERALL TRENDS

Question: Please tell us whether each of the following play an important role in your decision to make cultural activities a part of your life.

(Continued on following page)
4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.1 REASONS TO MAKE CULTURE A PART OF ONE’S LIFE: OVERALL TRENDS (CONT’D)

Selected Findings:

• The top three factors a culturally-engaged person typically considers when deciding whether to spend their time on a cultural activity are: “Is it entertaining?”, “Can I do it with my friends or family?” and “Does this activity expand my knowledge and understanding?” (first measured this year).

• There is a noticeable increase in the importance of learning about another time or culture, exposing or introducing oneself to something new, and experiencing the high quality of the performance/art.

• Notably, culturally-engaged audiences report that being “in the know” or enhancing their own sense of self or personal identity are not top motivators to make culture a part of their lives.
4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.2 REASONS TO MAKE CULTURE A PART OF ONE’S LIFE: BY GENERATION

Question: Please tell us whether each of the following play an important role in your decision to make cultural activities a part of your life.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Millennials (n=680)</th>
<th>Gen X (n=1203)</th>
<th>Boomers (n=1803)</th>
<th>Pre-War (n=340)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment/enjoyment</td>
<td>93%</td>
<td>92%</td>
<td>93%</td>
<td>93%</td>
</tr>
<tr>
<td>Spend time with friends and family</td>
<td>82%</td>
<td>82%</td>
<td>78%</td>
<td>80%</td>
</tr>
<tr>
<td>Expand my knowledge and understanding</td>
<td>84%</td>
<td>83%</td>
<td>78%</td>
<td>81%</td>
</tr>
<tr>
<td>Interest in an artist, genre, or work of art</td>
<td>76%</td>
<td>76%</td>
<td>78%</td>
<td>78%</td>
</tr>
<tr>
<td>Support a friend or family member involved</td>
<td>79%</td>
<td>75%</td>
<td>76%</td>
<td>78%</td>
</tr>
<tr>
<td>Interest in learning about another time or culture</td>
<td>78%</td>
<td>78%</td>
<td>77%</td>
<td>78%</td>
</tr>
<tr>
<td>Expose or introduce myself to something new</td>
<td>77%</td>
<td>76%</td>
<td>73%</td>
<td>74%</td>
</tr>
<tr>
<td>Escape everyday stress and rejuvenate</td>
<td>64%</td>
<td>64%</td>
<td>73%</td>
<td>69%</td>
</tr>
<tr>
<td>Experience the high quality of the performance/art</td>
<td>68%</td>
<td>68%</td>
<td>73%</td>
<td>72%</td>
</tr>
<tr>
<td>Support organizations that are important to me</td>
<td>73%</td>
<td>73%</td>
<td>77%</td>
<td>77%</td>
</tr>
<tr>
<td>Family or personal tradition</td>
<td>66%</td>
<td>66%</td>
<td>64%</td>
<td>67%</td>
</tr>
<tr>
<td>Connect with others enjoying the same event</td>
<td>61%</td>
<td>61%</td>
<td>62%</td>
<td>62%</td>
</tr>
<tr>
<td>Experience and enjoy a community space</td>
<td>56%</td>
<td>55%</td>
<td>52%</td>
<td>53%</td>
</tr>
<tr>
<td>Enhance my sense of self or identity</td>
<td>49%</td>
<td>49%</td>
<td>52%</td>
<td>53%</td>
</tr>
<tr>
<td>Learn about or celebrate my cultural heritage</td>
<td>41%</td>
<td>41%</td>
<td>47%</td>
<td>47%</td>
</tr>
<tr>
<td>Support organizations that are important to my community</td>
<td>54%</td>
<td>54%</td>
<td>53%</td>
<td>56%</td>
</tr>
<tr>
<td>Introduce culture to my family</td>
<td>57%</td>
<td>57%</td>
<td>58%</td>
<td>60%</td>
</tr>
<tr>
<td>Be &quot;in the know&quot; about the latest trends</td>
<td>24%</td>
<td>24%</td>
<td>22%</td>
<td>22%</td>
</tr>
</tbody>
</table>

(Continued on following page)
4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.2 REASONS TO MAKE CULTURE A PART OF ONE’S LIFE: BY GENERATION (CONT’D)

Selected Findings:

• The younger the respondent, the more likely they are to view cultural activities as a way to escape everyday stress and rejuvenate.

• Gen X respondents are more likely than any other generation to participation in cultural activities as a way to introduce culture to their family.
4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.3 PLANNING CONSIDERATIONS

Question: Please tell us whether the following are important factors in planning to attend a cultural activity.

Selected Findings:

- For the vast majority of respondents, convenience of both hours and location, ease of parking, and the ability to plan a visit in advance are the most important factors in planning to attend a cultural event.

- For those with children, the availability of family activities is also very important.

Note: Ease of parking was a newly introduced option in 2014.
4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.4 MOTIVATORS FOR ATTENDING CULTURAL ACTIVITIES: OVERALL TRENDS

Question: Please tell us whether the following factors influence your decision to attend a cultural activity.

<table>
<thead>
<tr>
<th>Factor</th>
<th>2014 (n=4005)</th>
<th>2011 (n=4026)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic of program or event</td>
<td>95</td>
<td>83</td>
</tr>
<tr>
<td>Cost of the event</td>
<td>86</td>
<td>86</td>
</tr>
<tr>
<td>Invited by family or friends</td>
<td>81</td>
<td>83</td>
</tr>
<tr>
<td>Friends’ recommendations</td>
<td>75</td>
<td>81</td>
</tr>
<tr>
<td>My spouse/partner is interested</td>
<td>73</td>
<td>73</td>
</tr>
<tr>
<td>Availability of discounted tickets</td>
<td>72</td>
<td>72</td>
</tr>
<tr>
<td>Ease of obtaining tickets</td>
<td>71</td>
<td>66</td>
</tr>
<tr>
<td>Special event</td>
<td>61</td>
<td>62</td>
</tr>
<tr>
<td>Transportation/ convenience of parking</td>
<td>60</td>
<td>63</td>
</tr>
<tr>
<td>At favorite venue</td>
<td>57</td>
<td>59</td>
</tr>
<tr>
<td>Support a local institution</td>
<td>55</td>
<td>59</td>
</tr>
<tr>
<td>Publicity or buzz</td>
<td>51</td>
<td>49</td>
</tr>
<tr>
<td>Recommendation by a critic</td>
<td>33</td>
<td>29</td>
</tr>
<tr>
<td>Appealing to children*</td>
<td>80</td>
<td>72</td>
</tr>
</tbody>
</table>

* based on those with children

Note: In instances where 2011 data is not shown, those options were newly introduced in 2014.
4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.4 MOTIVATORS FOR ATTENDING CULTURAL ACTIVITIES: OVERALL TRENDS (CONT’D)

Selected Findings:

• The most important factor influencing cultural engagement is the topic of the program or event; the subject matter must speak to the participant in some way for them to make the effort to engage.

• Following close behind is the cost of the event and whether or not friends, family and/or spouse or partner are interested in the topic.

• Respondents are also heavily influenced by recommendations from their inner circle—much more so than recommendations from critics or buzz.
4.5 MOTIVATORS FOR ATTENDING CULTURAL ACTIVITIES: BY FREQUENCY OF ATTENDANCE

Question: Please tell us whether the following factors influence your decision to attend a cultural activity.

<table>
<thead>
<tr>
<th>Factor</th>
<th>No Events</th>
<th>1 to 2 Events</th>
<th>3+ Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic of program or event</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friends' recommendations</td>
<td>83</td>
<td>69</td>
<td>67</td>
</tr>
<tr>
<td>Invited by family or friends</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost of the event</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friends' recommendations</td>
<td>86</td>
<td>66</td>
<td>70</td>
</tr>
<tr>
<td>Invited by family or friends</td>
<td>87</td>
<td>67</td>
<td>70</td>
</tr>
<tr>
<td>Cost of the event</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Availability of discounted tickets</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ease of obtaining tickets</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special event</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My spouse/partner is interested</td>
<td>60</td>
<td>35</td>
<td>63</td>
</tr>
<tr>
<td>Appealing to children*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support a local institution</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>At favorite venue</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation/convenience of parking</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publicity or buzz</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recommendation by a critic</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* based on those with children

(Continued on following page)
4.5 MOTIVATORS FOR ATTENDING CULTURAL ACTIVITIES: 
BY FREQUENCY OF ATTENDANCE (CONT’D)

Selected Findings:

• The less culturally active the respondent, the less likely they are to be influenced by any of the listed factors.

• The more culturally-active the respondent, the more likely they are to be influenced by all of the listed factors—with the notable exception of factors related to cost. For those factors, those who attend 1 to 2 events per month are most likely to be influenced.
4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.6 BARRIERS TO ATTENDING CULTURAL ACTIVITIES: OVERALL TRENDS

Question: What are the barriers, if any, that prevent you from attending cultural activities?

Note: In instances where 2011 data is not shown, those options were newly introduced in 2014.

(Continued on following page)
4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.6 BARRIERS TO ATTENDING CULTURAL ACTIVITIES: OVERALL TRENDS (CONT’D)

Selected Findings:

• In general, 2014 respondents are more likely to cite each item as a potential barrier compared to 2011 respondents.

• Cost and lack of interest in the event are the two key barriers that prevent people from attending cultural activities, followed by the hassle of getting there and not feeling that the event is personally relevant.

• Among those with children, approximately a third consider an event not being “child-friendly” a barrier to participation.
4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.7 BARRIERS TO ATTENDING CULTURAL ACTIVITIES: BY GENERATION

Question: What are the barriers, if any, that prevent you from attending cultural activities?

(Continued on following page)
4.7 BARRIERS TO ATTENDING CULTURAL ACTIVITIES:
BY GENERATION (CONT’D)

Selected Findings:

• Millennials are far less likely than older generations to go to a cultural activity if it means going alone.

• Over 75% of Pre-Wars won’t go to a cultural activity if they feel that the topic is not appealing to them.
4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.8 INCENTIVES FOR CULTURAL PARTICIPATION

Question: Which of the following items would increase your participation in cultural activities?

- Tickets were less expensive
- Free programs or events
- More convenient transportation and/or parking
- I could dress casually
- Programs targeted towards my age or interest group
- Incentives for bringing family or friends
- I was given more information in advance about the event
- I could purchase tickets last-minute
- A more convenient or extended programming schedule
- The cultural organization provided online resources to plan my visit
- I felt more invited or welcomed by the cultural organization
- Friendlier Staff
- Resources that enhance my visit
- Connections with local community organizations
- Events with opportunities for socializing
- Guaranteed premium access or seating for a higher ticket price
- Other
- None of the above

(Continued on following page)
4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.8 INCENTIVES FOR CULTURAL PARTICIPATION (CONT’D)

Selected Findings:

• Cost and convenience are the main enticements that would encourage respondents to participate more—particularly less expensive tickets, which interestingly is far more important to respondents than free programs or events.
5. ENHANCING THE CULTURAL EXPERIENCE
5. ENHANCING THE CULTURAL EXPERIENCE

5.1 PREPARING FOR A CULTURAL EXPERIENCE: OVERALL TRENDS

Question: If you prepare for your visit to a cultural organization in advance, which information sources do you use?

Selected Findings:

- Of the resources used to prepare for a cultural experience, there has been a sizable increase in the proportion of respondents now visiting the cultural organizations’ website, while usage of other items (brochures, catalogues, news articles and reviews) has remained relatively stable.

- Very few respondents (6%) use a cultural organization’s mobile app to prepare for their visit.

Note: In instances where 2011 data is not shown, those options were newly introduced in 2014.
5. ENHANCING THE CULTURAL EXPERIENCE

5.2 PREPARING FOR A CULTURAL EXPERIENCE:
BY GENERATION

Question: If you prepare for your visit to a cultural organization in advance, which information sources do you use?

(Continued on following page)
5. ENHANCING THE CULTURAL EXPERIENCE

5.2 PREPARING FOR A CULTURAL EXPERIENCE: BY GENERATION (CONT’D)

Selected Findings:

• Each generation turns to very different sources to prepare for a cultural experience. Younger generations are more likely to turn to online sources (organization’s website, social media, other websites, Wikipedia, mobile apps), while the older generations turn to more traditional print sources (brochures, articles and reviews).

• Millennials are nearly twice as likely to use social media to prepare for an event compared to Gen X, nearly three times more likely than Boomers, and over seven times more likely than Pre-Wars.

• Regardless of age, the dominant online media resource cultural audiences use to prepare for their visit is the organization’s website.
5. ENHANCING THE CULTURAL EXPERIENCE

5.3 ENRICHING THE EXPERIENCE ON-SITE

Question: When you visit a cultural organization, what additional information do you use to enrich your visit on-site?

![Bar chart showing the percentage of respondents using various forms of enrichment during a cultural visit.]

Note: In instances where 2011 data is not shown, those options were newly introduced in 2014.
5. ENHANCING THE CULTURAL EXPERIENCE

5.3 ENRICHING THE EXPERIENCE ON-SITE (CONT’D)

Selected Findings:

• Almost nine in ten respondents use supplemental information to enrich their visit or experience.

• Three in five (62%) use brochures, guides, or other printed materials available online, and two in five (43%) use performance programs.

• A third (36%) use a guided tour by an individual, wall text (35%), exhibition catalogues (33%), or a self-guided audio-tour (31%).
5. ENHANCING THE CULTURAL EXPERIENCE

5.4 OWNERSHIP OF MOBILE DEVICES

Question: Do you own the following mobile devices?

Selected Insights:

- Ownership of mobile devices has skyrocketed since 2011.
5. ENHANCING THE CULTURAL EXPERIENCE

5.5 MOBILE DEVICE USE ON-SITE

Question: Have you used the following mobile devices on-site?

Selected Findings:

- Despite the fact that ownership of mobile devices has sharply increased, few respondents are using them on-site. This represents a transitional moment for cultural organizations, when mobile devices could soon become an integral part of the cultural experience, if organizations provide digital tools that speak to audiences' needs and desires (see pages 48 - 49).

- Of the mobile devices tested, respondents are most likely to have used their smartphone to enhance their experience at a cultural organization.
5. ENHANCING THE CULTURAL EXPERIENCE

5.6 MOBILE DEVICE ACTIVITIES ON-SITE

Question: During past visits to cultural organizations, have you ever used a mobile device for any of the following activities?

![Bar graph showing mobile device activities on-site.

Selected Findings:

- Among those who have used a mobile device during their visits to cultural organizations, taking and sharing photos are the most popular activities.

- About a third have accessed the organization’s website while on-site (35%), conducted a search about the artist, school, movement, or artwork (34%), or “checked in” on social media (31%).

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5. ENHANCING THE CULTURAL EXPERIENCE

5.7 DESIRED FEATURES IN CULTURAL MOBILE APPS: OVERALL TRENDS

Question: Which resources or information would you find appealing in a mobile app from a cultural organization?

Selected Findings:

• Respondents would most like to see “behind-the-scenes” information (39%), but they also find the ability to manage or buy their tickets appealing (36%).

• 44% still prefer to enjoy a cultural experience without their mobile device, which could point to a desire to view cultural organizations as a respite from technology, or it could indicate a lack of interest in those on-site mobile device activities that they have experienced to date.
5. ENHANCING THE CULTURAL EXPERIENCE

5.8 DESIRED FEATURES IN CULTURAL MOBILE APPS: BY GENERATION

Question: Which resources or information would you find appealing in a mobile app from a cultural organization?

Selected Findings:

- Millennials and Gen X are the early adopters of all things mobile, showing the greatest interest in all of the features.
5. ENHANCING THE CULTURAL EXPERIENCE

5.9 EFFECT OF INTEGRATED TECHNOLOGY ON INTEREST

Question: Do you feel that cultural activities that use integrated technology (such as electronic kiosks, interactive games, and video clips) are more or less interesting than those that do not?

Selected Findings:

• The vast majority of respondents who have used mobile technology while at a cultural event or organization feel that integrated technology makes the activities more interesting (68%).

• Very few feel that integrated technology makes the activity less interesting.
6. VISUAL ARTS PARTICIPATION
6. VISUAL ARTS PARTICIPATION

6.1 ATTENDANCE PATTERNS

Question: Please tell us how often you participate in the following cultural activities. (n=4026)

Selected Findings:

• A third of the respondents visit art galleries and museums about once a year, while two in ten visit several times a year.
6. VISUAL ARTS PARTICIPATION

6.2 ATTENDANCE PLANNING

Question: When do you typically decide to go to art museums or visual arts organizations?

Selected Findings:

• Advance planning is on the rise for visual arts attendees.

Note: Those who visit art galleries or art museums “rarely or never” (see page 53) were not asked this question.
6. VISUAL ARTS PARTICIPATION

6.3 MEMBERSHIP

Question: Are you a member of any art museums or other visual arts organizations? If so, how many memberships do you currently hold?

Selected Findings:

• The percentage of respondents who currently hold memberships to visual arts organizations has decreased from 26% in 2011 to 15% in 2014.

• Five in six visual arts respondents (85%) do not belong to a visual arts organization. One in ten (11%) belong to one or two organizations.

• For 2014, respondents who are not currently visual arts members were allowed to note if they had been members in the past. Of the 85% who are not currently members, 24% have been members in the past and 61% have never been members.

Note: Those who visit art galleries or art museums “rarely or never” (see page 53) were not asked this question.
### 6. VISUAL ARTS PARTICIPATION

#### 6.4 MEMBERSHIP MOTIVATIONS FOR CURRENT MEMBERS

Question: What influences or motivates you to purchase or renew memberships to art museums or other visual arts organizations?

<table>
<thead>
<tr>
<th>Motivation</th>
<th>2011 (%)</th>
<th>2014 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desire to support organizations I like</td>
<td>45</td>
<td>47</td>
</tr>
<tr>
<td>It’s less expensive than purchasing individual tickets</td>
<td>43</td>
<td>45</td>
</tr>
<tr>
<td>Discounts on parking, merchandise and in the cafe</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td>It gets me out to see cultural events I might not otherwise see</td>
<td>37</td>
<td>36</td>
</tr>
<tr>
<td>I don’t have to stand in the ticket line</td>
<td>32</td>
<td>38</td>
</tr>
<tr>
<td>Interest in temporary or special exhibitions</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>Members-only events</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td>Convenience</td>
<td>34</td>
<td>31</td>
</tr>
<tr>
<td>Promotions/mailings from the organization</td>
<td>33</td>
<td>31</td>
</tr>
<tr>
<td>Interest in the permanent collection</td>
<td>23</td>
<td>38</td>
</tr>
<tr>
<td>Tax deductibility</td>
<td>21</td>
<td>19</td>
</tr>
<tr>
<td>Stature/reputation of the organization</td>
<td>15</td>
<td>25</td>
</tr>
<tr>
<td>It’s social</td>
<td>14</td>
<td>32</td>
</tr>
<tr>
<td>Advertisements</td>
<td>8</td>
<td>29</td>
</tr>
</tbody>
</table>

(Continued on following page)
6. VISUAL ARTS PARTICIPATION

6.4 MEMBERSHIP MOTIVATIONS FOR CURRENT MEMBERS (CONT’D)

Selected Findings:

• The desire to support organizations that one likes remains the highest motivator for purchasing or renewing memberships.

• The next most influential factors relate to value, highlighting that memberships are less expensive than purchasing individual tickets, and provide discounts on parking, merchandise and in the café.

• Interest in the permanent collection has dropped substantially, and interest in temporary/special exhibitions has decreased a bit as well.

• Notably, access to exclusive events, and social motivations—factors often thought to be crucial components of loyalty models—have decreased.

Note: Those who visit art galleries or art museums “rarely or never” (see page 53) were not asked this question.
6. VISUAL ARTS PARTICIPATION

6.5 MEMBERSHIP MOTIVATIONS FOR NON-MEMBERS

Question: Given that you do not currently have a membership to an art museum or other visual arts organization, what would make you more inclined to purchase one?

<table>
<thead>
<tr>
<th>Motivation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less expensive tickets with a membership</td>
<td>58</td>
</tr>
<tr>
<td>Discounts on parking, merchandise and in the cafe</td>
<td>41</td>
</tr>
<tr>
<td>Convenience</td>
<td>29</td>
</tr>
<tr>
<td>Access to members-only events</td>
<td>25</td>
</tr>
<tr>
<td>Case of signing up online</td>
<td>23</td>
</tr>
<tr>
<td>Advance ticketing for programs</td>
<td>22</td>
</tr>
<tr>
<td>Tax deductibility</td>
<td>22</td>
</tr>
<tr>
<td>Promotions/mailings from the organization</td>
<td>22</td>
</tr>
<tr>
<td>Interest in temporary or special exhibitions</td>
<td>18</td>
</tr>
<tr>
<td>It's social</td>
<td>10</td>
</tr>
<tr>
<td>Stature/reputation of the organization</td>
<td>8</td>
</tr>
</tbody>
</table>

Note: This question was newly introduced in 2014.

(Continued on following page)
6. VISUAL ARTS PARTICIPATION

6.5 MEMBERSHIP MOTIVATIONS FOR NON-MEMBERS (CONT’D)

Selected Findings:

• For the most part, non-members are motivated to consider joining by the same factors and to the same degree as members. The one exception is that membership is less expensive than purchasing individual tickets—this is a motivating factor for 58% of non-members vs. 42% of members.

• Items that are less motivating for non-members compared to members include access to members-only events (25% for non-members vs. 35% for members) and interest in temporary special exhibitions (18% for non-members vs. 35% for members).

Note: Those who visit art galleries or art museums “rarely or never” (see page 53) were not asked this question.
6.6 ACCESSING VISUAL ARTS COLLECTIONS ONLINE: OVERALL PATTERNS

Question: Have you ever accessed a visual arts museum’s online collection?

Selected Findings:

- Over half of the respondents are not aware that some visual arts organizations have online collections (56%). (This question was asked of all respondents, regardless of whether they had been to a visual arts organization.)

- One in seven (14%) have accessed an online collection. Of those who have visited an online collection, one in ten have never or rarely visited art galleries or art museums (11%).
6. VISUAL ARTS PARTICIPATION

6.7 ACCESSING VISUAL ARTS COLLECTIONS ONLINE: BY FREQUENCY OF PARTICIPATION

Question: Have you ever accessed a visual arts museum’s online collection?

Selected Findings:

- The more active the respondents are, the more likely they are to have accessed a visual arts museum’s online collection.
6. VISUAL ARTS PARTICIPATION

6.8 ONLINE COLLECTION PREFERENCES

Question: In regard to exploring visual arts museums’ online collections, which of the following are you interested in?

Selected Findings:

- Respondents who have visited online art collections are most interested in the access they provide to art that is not normally available to them due to location (64%), followed by the ability to see the work in greater detail (57%).

- They are least interested in the social components that an online collection can provide (e.g., sharing their own art, connecting via social media).
7. PERFORMING ARTS PARTICIPATION
7. PERFORMING ARTS PARTICIPATION

7.1 ATTENDANCE PATTERNS

Question: Please tell us how often you participate in the following cultural activities.

Selected Findings:

• The vast majority of respondents attend a performing arts event less than once per year.

• Dramatic theater and musical theater are the most attended performing arts—roughly half of the respondents attend musical theater (52%) and dramatic theater (47%) at least once a year.

• About two in five attend jazz music (37%) and classical music (43%) events once a year.
7. PERFORMING ARTS PARTICIPATION

7.2 ATTENDANCE PLANNING

Question: When do you typically decide to go to a performing arts event?

<table>
<thead>
<tr>
<th></th>
<th>2011 (n=3152)</th>
<th>2014 (n=2987)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Well in advance</td>
<td>62%</td>
<td>72%</td>
</tr>
<tr>
<td>A few days in advance,</td>
<td>35%</td>
<td>24%</td>
</tr>
<tr>
<td>for example when I plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>my week</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The same day as the event</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Selected Findings:

- Advance planning is on the rise for performing arts attendees, much more so than for the visual arts.

Note: Those who visit performing arts organizations “rarely or never” (see page 64) were not asked this question.
7. PERFORMING ARTS PARTICIPATION

7.3 SUBSCRIPTION

Question: Do you currently hold subscriptions for any performing organizations? If so, how many subscriptions do you currently hold?

Selected Findings:

- Subscriptions to performing arts organizations have decreased from 22% to 10%. Now, only one in ten performing arts attendees (90%) have a subscription to a performing arts organization.

- For 2014, respondents who are not currently performing arts subscribers were allowed to note if they had been subscribers in the past. Of the 90% who are not currently subscribers, 21% have been subscribers in the past and 69% have never been subscribers.

Note: Those who visit performing arts organizations “rarely or never” (see page 64) were not asked this question.
7. PERFORMING ARTS PARTICIPATION

7.4 SUBSCRIPTION MOTIVATIONS FOR CURRENT SUBSCRIBERS

Question: What influences or motivates you to purchase or renew subscriptions to performing organizations?

Selected Findings:

- The majority of the top motivations for current performing arts subscribers to purchase or renew have not shifted much since 2011. Value and content continue to serve as the primary motivations.

- Subscribers-only events and social motivations have declined, mirroring trends for visual arts membership motivations.

- The substantial decline in simplifying planning suggests that subscribers might prefer to customize their own experience, rather than have it prescribed for them.

Note: Those who visit performing arts organizations “rarely or never” (see page 64) were not asked this question.
7. PERFORMING ARTS PARTICIPATION

7.5 SUBSCRIPTION MOTIVATIONS FOR NON-SUBSCRIBERS

Question: Given that you do not currently have a subscription to a performing arts organization, what would make you more inclined to purchase one?

<table>
<thead>
<tr>
<th>Motivation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less expensive tickets are available when you buy a subscription</td>
<td>54%</td>
</tr>
<tr>
<td>Interest in the type of performance</td>
<td>41%</td>
</tr>
<tr>
<td>Convenience</td>
<td>33%</td>
</tr>
<tr>
<td>Better quality seating</td>
<td>31%</td>
</tr>
<tr>
<td>Desired programming listed in their season brochure</td>
<td>18%</td>
</tr>
<tr>
<td>Access to subscriber-only receptions and social events</td>
<td>17%</td>
</tr>
<tr>
<td>If any of my friends or family members subscribed</td>
<td>15%</td>
</tr>
<tr>
<td>More flexibility in planning when I buy a subscription</td>
<td>14%</td>
</tr>
<tr>
<td>Stature/reputation of the organization</td>
<td>7%</td>
</tr>
<tr>
<td>Simplification of planning</td>
<td>5%</td>
</tr>
</tbody>
</table>

Note: This question was newly introduced in 2014.

(Continued on following page)
7. PERFORMING ARTS PARTICIPATION

7.5 SUBSCRIPTION MOTIVATIONS FOR NON-SUBSCRIBERS (CONT’D)

Selected Findings:

• Non-subscribers are like subscribers in that they are most motivated by less expensive individual tickets and interest in the type of performance.

• Non-subscribers are less motivated than current subscribers by the type of performance, specific programming, flexibility regarding planning, and simplified planning.

Note: Those who visit performing arts organizations “rarely or never” (see page 64) were not asked this question.
7. PERFORMING ARTS PARTICIPATION

7.6 EXPERIENCING THE PERFORMING ARTS ONLINE

Question: Please tell us whether you use the following online sources to experience performances by performing arts organizations.

Selected Findings:

- Eight in ten respondents have used YouTube to experience performances from performing arts organizations (79%). The next most common source for online performances are archives (58%).

- On the other end of the spectrum, about half are not aware of Vimeo (51%).
7. PERFORMING ARTS PARTICIPATION

7.7 PREFERENCES FOR ONLINE PERFORMING ARTS EXPERIENCES

Question: Which of the following are you interested in with regard to experiencing the performing arts online?

Selected Findings:

- Respondents who have viewed performances online are largely driven by the convenience and value that such experiences offer, and less by social factors.
8. NON-VISUAL ARTS MUSEUM PARTICIPATION
8. NON-VISUAL ARTS MUSEUM PARTICIPATION

8.1 ATTENDANCE PATTERNS

Question: Please tell us how often you participate in the following cultural activities.

Selected Findings:

- Seven in ten respondents visit history museums (71%) and science museums (72%) at least once a year.
- Eight in ten visit living museums (81%) and three in ten (30%) visit children’s museums at least once a year.
8. NON-VISUAL ARTS MUSEUM PARTICIPATION

8.2 MOTIVATORS FOR VISITING NON-VISUAL ARTS MUSEUMS

Question: What influences or motivates you to visit a non-visual arts museum?

Selected Findings:

- Approximately seven in ten respondents (69%) visit non-art museums because they enjoy the subject matter, while roughly six in ten (63%) say they visit because it entertains them.

- As with visual and performing arts, social and exclusive factors are less motivating.

Note: Those who visit non-visual arts museums “rarely or never” (see page 73) were not asked this question.
8. NON-VISUAL ARTS MUSEUM PARTICIPATION

8.3 MEMBERSHIP

Question: Are you a member of any non-visual arts museums? If so, how many memberships do you currently hold?

Selected Findings:

- More than seven in ten respondents (72%) have never been members of a non-visual arts museum.

Note: Those who visit non-visual arts museums “rarely or never” (see page 73) were not asked this question.
8. NON-VISUAL ARTS MUSEUM PARTICIPATION

8.4 MEMBERSHIP MOTIVATIONS FOR CURRENT MEMBERS

Question: What influences or motivates you to purchase or renew memberships to non-visual arts museums?

<table>
<thead>
<tr>
<th>Motivation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's less expensive than purchasing individual tickets</td>
<td>51%</td>
</tr>
<tr>
<td>Desire to support organizations I like</td>
<td>46%</td>
</tr>
<tr>
<td>Access to members-only events</td>
<td>25%</td>
</tr>
<tr>
<td>Convenience</td>
<td>32%</td>
</tr>
<tr>
<td>My children enjoy it</td>
<td>31%</td>
</tr>
<tr>
<td>Discounts on merchandise and in the café</td>
<td>29%</td>
</tr>
<tr>
<td>Interest in the permanent collection</td>
<td>27%</td>
</tr>
<tr>
<td>Promotions/ mailings from the organization</td>
<td>25%</td>
</tr>
<tr>
<td>It gets me out to see cultural events I might not otherwise see</td>
<td>25%</td>
</tr>
<tr>
<td>Stature/reputation of the organization</td>
<td>19%</td>
</tr>
<tr>
<td>Tax deductibility</td>
<td>15%</td>
</tr>
<tr>
<td>It's social</td>
<td>15%</td>
</tr>
</tbody>
</table>

Selected Findings:

- As with visual arts and performing arts, respondents are most motivated to purchase or renew memberships to non-visual arts museums by cost benefits and a desire to support organizations they like. Social benefits again ranked quite low.

Note: Those who visit non-visual arts museums “rarely or never” (see page 73) were not asked this question.
9. ARTS PARTICIPATION COMPARISON
9. ARTS PARTICIPATION COMPARISON

9.1 ATTENDANCE PARTNERS

Question: With whom do you usually attend [organization type]?

Selected Findings:

- Across all cultural organizations, respondents are most likely to attend with their spouse or partner.
- Those visiting non-visual arts museums are more likely than those attending visual arts museums or performing arts to go with children or other family members.
9. ARTS PARTICIPATION COMPARISON

9.2 ATTENDANCE PLANNING

Question: When do you typically decide to go to [organization type]?

Selected Findings:

- Few cultural participants plan their activity on the same day of the event, regardless of the type of cultural activity.

- Those attending performing arts events are more likely to have planned their excursion well in advance, while those attending museums (visual arts and non-visual arts) are most likely to have planned a few days in advance.
9. ARTS PARTICIPATION COMPARISON

9.3 PREFERRED METHOD OF PURCHASE

Question: What is your preferred method of purchase for [organization type]?

Selected Findings:

- Online ticket purchasing is the preferred option for those participating in visual arts or performing arts events.
- For those visiting non-visual arts museums, purchasing tickets in person is the preferred option.
9. ARTS PARTICIPATION COMPARISON

9.4 MEMBERSHIP / SUBSCRIPTION

Question: Do you currently hold memberships/subscriptions for any [organization type]?

Selected Findings:

• The vast majority of respondents are not members or subscribers of any type of cultural organization.
10. CHARITABLE GIVING TO CULTURAL ORGANIZATIONS
10. CHARITABLE GIVING TO CULTURAL ORGANIZATIONS

10.1 CHARITABLE GIVING PLANS

Question: Do you plan on making charitable contributions to cultural organizations in the next year?

Selected Findings:

- Despite the economic downturn, charitable giving to cultural organizations is vibrant. Over a third of the respondents (35%) intend to make a charitable contribution this year, which is in line with 2011 (33%). Of those respondents, the majority will give the same amount they gave in 2013 (22%), and 4% will give more.

- Almost two-thirds (66%) of respondents do not intend to donate this year, and the vast majority of those (57%) did not donate in 2013.
10. CHARITABLE GIVING TO CULTURAL ORGANIZATIONS

10.2 MOTIVATIONS FOR CHARITABLE GIVING

Selected Findings:

- Respondents are most driven to donate to cultural organizations in order to benefit the community (61%), as opposed to satisfying self-focused desires like tax deductibility, benefits received in exchange for contributions, or leaving a legacy.

- About half are motivated by a sense of personal connection: supporting an organization they enjoy (59%) and because supporting art is important to them (48%).

- Less than one in ten (8%) are motivated by the desire to leave a legacy.

Note: Leaving a legacy was a newly introduced option in 2014.
11. CORPORATE SPONSORSHIP
11. CORPORATE SPONSORSHIP

11.1 PERCEPTIONS OF CORPORATE SPONSORSHIP

Question: Please tell us if you agree with the following statements.

Selected Findings:

- Corporate sponsorships are more admired than ever. Over half of respondents think highly of cultural sponsors (55%) and feel good about doing business with them (53%). Over a third (35%) are more likely to purchase goods or services from corporations that support the arts, while the small proportion of respondents who in 2011 felt that nobody benefits from sponsorship, has in fact decreased from 12% to 4%.

- On the other end of the spectrum, a third of respondents (an increase of 9% over those in 2011) view sponsorship as just a marketing tactic. This suggests that while audiences are increasingly savvy and critical when it comes to corporate sponsorships, they recognize the potential for positive impact.
11. CORPORATE SPONSORSHIP

11.2 PERCEPTIONS OF CORPORATE SPONSORSHIP: BY FREQUENCY OF ATTENDANCE

Selected Insights:

- The more culturally active respondents are, the more likely they are to respond positively to corporate sponsorship.
12. OTHER FORMS OF CULTURAL PARTICIPATION
From 2001 to 2011, Culture Track focused exclusively on the cultural activities explored in the previous sections of this report (e.g. visual arts museums, dramatic theater, classical music, etc.). In 2014, Culture Track expanded its scope to include a wider variety of cultural activities in order to explore the ever-broadening cultural landscape.
12. OTHER FORMS OF CULTURAL PARTICIPATION

12.1 OTHER ACTIVITIES PERCEIVED AS CULTURAL: OVERALL TRENDS

Question: Do you consider the following activities to be cultural? How often do you participate in them?

(Continued on following page)
12. OTHER FORMS OF CULTURAL PARTICIPATION

12.1 OTHER ACTIVITIES PERCEIVED AS CULTURAL: OVERALL TRENDS (CONT’D)

Selected Findings:

• The previous chart displays the overall percentage of those who consider these other activities to be a cultural activity, as well as the percentage of respondents who participate in that activity at least once per year.

• Not only does a high percentage of audiences consider just over half of the items above to be cultural, but they are very active within this broader landscape.

• The items that are most likely to be considered cultural include visiting parks, viewing public art, and visiting a memorial site, while listening to podcasts, listening to commercial radio, and playing a video game ranked lowest.

• Notably, food and drink experiences fall within the top 10, with 64% of respondents considering this to be a cultural activity.
### 12. OTHER FORMS OF CULTURAL PARTICIPATION

#### 12.2 OTHER ACTIVITIES PERCEIVED AS CULTURAL: BY GENERATION

Question: Do you consider the following activities to be cultural?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Millennials (n=680)</th>
<th>Gen X (n=1203)</th>
<th>Boomers (n=1803)</th>
<th>Pre-War (n=340)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting national, state, and municipal parks</td>
<td>77</td>
<td>77</td>
<td>78</td>
<td>78</td>
</tr>
<tr>
<td>Viewing public art</td>
<td>75</td>
<td>77</td>
<td>77</td>
<td>77</td>
</tr>
<tr>
<td>Visiting a memorial site</td>
<td>70</td>
<td>77</td>
<td>77</td>
<td>77</td>
</tr>
<tr>
<td>Visiting art, craft, furniture, or design fairs or festivals</td>
<td>75</td>
<td>77</td>
<td>77</td>
<td></td>
</tr>
<tr>
<td>Participating in architectural tours or site visit</td>
<td>70</td>
<td>77</td>
<td>74</td>
<td>74</td>
</tr>
<tr>
<td>Attending fine arts and antiques auctions or fairs</td>
<td>64</td>
<td>66</td>
<td>66</td>
<td>66</td>
</tr>
<tr>
<td>Exploring online collections or exhibitions, either on museum sites or other online arts sites</td>
<td>67</td>
<td>67</td>
<td>66</td>
<td>66</td>
</tr>
<tr>
<td>Watching a broadcast of a live performance in a movie theater</td>
<td>64</td>
<td>66</td>
<td>66</td>
<td>66</td>
</tr>
<tr>
<td>Food and drink experiences</td>
<td>43</td>
<td>58</td>
<td>71</td>
<td>78</td>
</tr>
<tr>
<td>Traveling</td>
<td>65</td>
<td>65</td>
<td>68</td>
<td>66</td>
</tr>
<tr>
<td>Viewing street art</td>
<td>54</td>
<td>62</td>
<td>68</td>
<td>66</td>
</tr>
<tr>
<td>Attending a lecture series or talk</td>
<td>54</td>
<td>60</td>
<td>64</td>
<td>64</td>
</tr>
<tr>
<td>Attending book or poetry readings</td>
<td>53</td>
<td>63</td>
<td>63</td>
<td>63</td>
</tr>
<tr>
<td>Seeing an independent film at a theater</td>
<td>46</td>
<td>63</td>
<td>63</td>
<td>63</td>
</tr>
<tr>
<td>Watching non-commercial television</td>
<td>47</td>
<td>55</td>
<td>64</td>
<td>64</td>
</tr>
<tr>
<td>Attending popular music concerts</td>
<td>51</td>
<td>59</td>
<td>58</td>
<td>58</td>
</tr>
</tbody>
</table>

(Continued on following page)
12. OTHER FORMS OF CULTURAL PARTICIPATION

12.2 OTHER ACTIVITIES PERCEIVED AS CULTURAL: BY GENERATION (CONT’D)

Question: Do you consider the following activities to be cultural?

- Watching an independent film at home
- Watching a live or recorded lecture online at home
- Listening to public radio
- Using a cultural institution’s app for related content or entertainment
- Antiquing
- Going to the circus
- Previewing or participating in an online art auction
- Seeing a blockbuster movie at a theater
- Streaming online original programming
- Watching network television
- Watching premium television
- Watching a blockbuster movie at home
- Listening to podcasts
- Listening to commercial radio
- Playing a video game

(Continued on following page)
12. OTHER FORMS OF CULTURAL PARTICIPATION

12.2 OTHER ACTIVITIES PERCEIVED AS CULTURAL: BY GENERATION (CONT’D)

Selected Findings:

• Younger respondents are more likely to consider food and drink experiences and attending popular music concerts to be cultural activities.

• The perception of viewing non-commercial television as a cultural activity is largely driven by older respondents—as is listening to public radio, but to a lesser degree.

• Older generations are more likely to consider watching a broadcast of a live performance in a movie theater to be a cultural activity, but are less likely than younger generations to consider accessing a cultural institution’s app to be a cultural activity.

• Older generations are more likely than younger generations to consider attending lectures to be a cultural activity.
12. OTHER FORMS OF CULTURAL PARTICIPATION

12.3 MOTIVATORS FOR OTHER ACTIVITIES
PERCEIVED AS CULTURAL

Question: Please tell us whether the following factors influence your decision to participate in the previously listed activities.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Influence (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic of activity</td>
<td>93</td>
</tr>
<tr>
<td>Cost of the activity</td>
<td>92</td>
</tr>
<tr>
<td>Invited by family or friends</td>
<td>85</td>
</tr>
<tr>
<td>Friends' recommendations</td>
<td>79</td>
</tr>
<tr>
<td>Appealing to children*</td>
<td>78</td>
</tr>
<tr>
<td>Availability of discounts</td>
<td>77</td>
</tr>
<tr>
<td>Ease of obtaining access</td>
<td>77</td>
</tr>
<tr>
<td>My spouse/partner is interested</td>
<td>75</td>
</tr>
<tr>
<td>Transportation arrangements/convenience of parking</td>
<td>69</td>
</tr>
<tr>
<td>Special event</td>
<td>67</td>
</tr>
<tr>
<td>Support an organization/group</td>
<td>56</td>
</tr>
<tr>
<td>Publicity or buzz surrounding the event</td>
<td>49</td>
</tr>
<tr>
<td>Recommendation by a critic, journalist or blogger</td>
<td>30</td>
</tr>
</tbody>
</table>

* based on those with children

Selected Findings:

- The top five items that influence involvement in these other cultural activities are the same ones that influence involvement in the cultural activities explored earlier in this study. Regardless of the activity, publicity and recommendations by critics are the least influential.

- For nine in ten respondents, the most influential factors in deciding to engage in these activities are topic and cost. Being invited by family or friends and friends’ recommendations are very influential.
12. OTHER FORMS OF CULTURAL PARTICIPATION

12.4 REASONS TO MAKE OTHER CULTURAL ACTIVITIES A PART OF ONE’S LIFE: OVERALL TRENDS

Question: Please tell us whether each of the following play an important role in your decision to make the previously listed activities a part of your life.

---

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment/enjoyment</td>
<td>95</td>
</tr>
<tr>
<td>Spend time with friends and family</td>
<td>85</td>
</tr>
<tr>
<td>Expand my knowledge and understanding</td>
<td>83</td>
</tr>
<tr>
<td>Interest in learning about another time or culture</td>
<td>80</td>
</tr>
<tr>
<td>Support a friend or family member involved</td>
<td>79</td>
</tr>
<tr>
<td>Expose or introduce myself to something new</td>
<td>77</td>
</tr>
<tr>
<td>Interest in an artist, genre, or work of art</td>
<td>77</td>
</tr>
<tr>
<td>Experience the high quality of the performance/art</td>
<td>73</td>
</tr>
<tr>
<td>Support organizations or events that are important to me</td>
<td>71</td>
</tr>
<tr>
<td>Escape everyday stress and rejuvenate</td>
<td>70</td>
</tr>
<tr>
<td>Family or personal tradition</td>
<td>63</td>
</tr>
<tr>
<td>Support organizations or events that are important to my community</td>
<td>63</td>
</tr>
<tr>
<td>Introduce culture to my family</td>
<td>58</td>
</tr>
<tr>
<td>Experience and enjoy an accessible, welcoming community space</td>
<td>57</td>
</tr>
<tr>
<td>Learn about or celebrate my cultural heritage</td>
<td>56</td>
</tr>
<tr>
<td>Connect with other enjoying the same event or environment</td>
<td>49</td>
</tr>
<tr>
<td>Enhance my sense of self or identity</td>
<td>47</td>
</tr>
<tr>
<td>Be “in the know” about the latest trends</td>
<td>24</td>
</tr>
</tbody>
</table>

2014 Overall (n=4026)
12. OTHER FORMS OF CULTURAL PARTICIPATION

12.4 REASONS TO MAKE OTHER CULTURAL ACTIVITIES A PART OF ONE’S LIFE: OVERALL TRENDS (CONT’D)

Selected Findings:

- Mirroring the drivers for the cultural activities explored earlier in this study, respondents consider entertainment/enjoyment, spending time with friends and family, and personal enrichment to be the most important factors for making these activities a part of their lives.
12. OTHER FORMS OF CULTURAL PARTICIPATION

12.5 REASONS TO MAKE OTHER CULTURAL ACTIVITIES A PART OF ONE’S LIFE: BY GENERATION

Question: Please tell us whether each of the following play an important role in your decision to make the previously listed activities a part of your life.

(Continued on following page)
12. OTHER FORMS OF CULTURAL PARTICIPATION

12.5 REASONS TO MAKE OTHER CULTURAL ACTIVITIES A PART OF ONE’S LIFE: BY GENERATION (CONT’D)

Selected Findings:

• As with the previously examined cultural activities, younger generations are more prone than older generations to participate in these other forms of cultural activities as a way to escape stress and rejuvenate, and to enhance their sense of self of identity.
13. DEFINING THE CULTURAL EXPERIENCE
13.DEFINING THE CULTURAL EXPERIENCE

For the first time, Culture Track asked respondents, “How would you define a cultural experience?”

The question was posed at the beginning of the survey. Because the survey questions that followed probed various aspects of the cultural experience and may have prompted respondents to think differently about what a cultural experience is to them, the question was asked again at the end of the survey so that respondents could revise or add to their original definition.

13.1 INITIAL DEFINITIONS

Selected responses:

“Something that takes you above your everyday life—a play, an evening of music, travel to another country. An experience that raises your awareness [and] that is uplifting.”

“Participation in an activity that expands my view of human endeavor and the wonders of the world such as art, music, history etc.”

“A cultural experience is something that enhances your mind, body and soul in a unique and profound way.”

“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.”

“Anything that you enjoy that broadens your mind.”

“Anything that allows me to experience the world around me.”

“The opportunity to have first-hand experience with a person, place, or thing that educates your mind and enhances your life.”

“An experience that broadens one’s perspective on the creativity of others.”

“Any moment of any day where someone learns something new, views the world as art, or tries new things.”

“An experience which enhances the emotional, spiritual, and mental aspects of life.”

“[An experience] that brings a person to a new level of understanding.”
13. DEFINING THE CULTURAL EXPERIENCE

13.2 REVISED DEFINITIONS

Selected responses:

“I never considered apps, movies, video games or solitary events to be ‘cultural’, but given the context presented, I’m willing to look at it differently.”

“You made me consider other ways to get a cultural experience (e.g., radio broadcasts, tv programming).”

“Includes more personal experiences.”

“I have become more aware of the many cultural activities I participate in every day.”

“I now see it as anything that allows me to experience the world around me.”

“More things can be cultural, if you go out and experience them.”

“Culture is anything that you enjoy that broadens your mind.”

“I thought that is was about experiencing things about other cultures and groups of people, but now realize it is also about experiencing things that are around me and my own community as well.”

“I have realized that almost anything can be considered as culture, especially food and cuisine. How could I forget that?”
14. DEMOGRAPHICS
14. DEMOGRAPHICS

14.1 GENDER

Selected Findings:

- In 2014, cultural participants were equally likely to be male and female. The 2011 results skewed five percent higher among females. Because quotas were not established for gender during recruiting, this result may reflect a shift toward higher engagement in cultural activities by men.
14. DEMOGRAPHICS

14.2 AGE

Selected Findings:

- The age proportions from the 2011 Culture Track study were used as quotas for the 2014 respondents. Such controls limit the possibility that changes in respondent attitudes toward cultural activities are based solely on factors related to age.
14. DEMOGRAPHICS

14.3 CHILDREN

Selected Findings:

• 25% of respondents have children 18 or under living in their home.

• Compared to 2011, 2014 respondents were less likely to have children in the home (25% in 2014 vs. 30% in 2011).
14. DEMOGRAPHICS

14.4 EDUCATION

Selected Findings:

- 2014 respondents are slightly more educated than the 2011 respondents, with two in five (43%) having at least a college degree.
14. DEMOGRAPHICS

14.5 HOUSEHOLD INCOME

Selected Findings:

- A third of respondents (34%) have household incomes under $40,000, while 15% have incomes of $100,000 or more.
14. DEMOGRAPHICS

14.6 ETHNICITY

Selected Findings:

• Though the initial pool of respondents invited to take the survey mirrored the ethnic breakdown of the U.S. population, the proportions shifted once respondents were screened to ensure that they had participated in at least one cultural activity in the past year.

• Ethnic breakouts in the 2014 study are similar to those in the 2011 study, despite the fact that no quotas were used.
14. DEMOGRAPHICS

14.7 COMMUNITY TYPE

Selected Findings:

- Almost half of the respondents (48%) live in the suburbs, while about a quarter each live in the city (27%) or rural areas (25%).
14. DEMOGRAPHICS

14.8 MARITAL STATUS

Selected Findings:

- Half of the respondents are married (52%), while another 7% are in a committed relationship.
14. DEMOGRAPHICS

14.9 GEOGRAPHIC LOCATION

Selected Findings:

- The geographic location of the 2014 respondents is similar to the 2011 results, and both are in line with the proportion of U.S. respondents by region.
THANK YOU TO THE FOLLOWING ORGANIZATIONS AND INDIVIDUALS THAT MADE CULTURE TRACK 2014 POSSIBLE.

Campbell Rinker
Dirk Rinker, President

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

LaPlaca Cohen
Arthur Cohen, CEO

Taulant Bushi, Designer
Wade Dansby 3, Senior Designer
Maggie Hartnick, Associate Director, Strategy and Branding
Allison Channing Jones, Strategist
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

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Jessie Montgomery
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