A version of this document was presented at TheTimesCenter in New York City on October 17th, 2017, by Arthur Cohen, CEO, and Maggie Hartnick, Managing Director, LaPlaca Cohen.

Culture Track is an initiative of LaPlaca Cohen, a strategy, design, and marketing firm for the cultural world. Research was undertaken in partnership with Kelton Global.

Learn more about Culture Track at CultureTrack.com.
About Culture Track
Culture Track is a national online survey of cultural consumers’ attitudes, motivators, and barriers to participation.
Data collected from 4,035 cultural consumers mirroring U.S. demographics, divided into 2 data sets.
Data Set 1: Ongoing Tracking

- Core questions that track key trends since 2001
- Select set of cultural activities
- Sample size: 1,022
  Margin of error: +/- 3.1%
Data Set 2: Future Forecasting

- Updated questions to help chart the future of culture
- Expanded set of cultural activities to reach a more diverse sample
- Sample size: 3,013
  Margin of error: +/- 1.8%
Culture Track

62%
Non-Hispanic Caucasians

17%
Hispanic

15%
African-American

4%
Asian

U.S. Population

61%
Non-Hispanic Caucasians

17%
Hispanic

13%
African-American

5%
Asian
<table>
<thead>
<tr>
<th>Region</th>
<th>Household Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast</td>
<td>19% Less than $30k</td>
</tr>
<tr>
<td>Midwest</td>
<td>23% $30k - $74k</td>
</tr>
<tr>
<td>South</td>
<td>37% $75k - $149k</td>
</tr>
<tr>
<td>West</td>
<td>21% $150k+</td>
</tr>
</tbody>
</table>
Generational Segments

20 - 35
Millennials

36 - 52
Gen X

53 - 71
Baby Boomers

72+
Pre-War
A Paradigm Shift
The world has fundamentally changed since Culture Track was first launched in 2001:
— Expansive new modes of communication and connection
— Transformed patterns of giving
— Endless options for leisure time
These shifts have radically transformed culture as well — beginning with its very definition.
An expanded definition of culture
Today, the definition of culture has democratized even further, possibly to the point of extinction.
Activities Defined as “Culture”

- Historic Attraction/Museum: 69%
- Art/Design Museum: 63%
- Community Festival/Street Fair: 62%
- Music Festival: 59%
- Natural History Museum: 57%
- Public/Street Art: 54%
- Food and Drink Experience: 52%
- Musical: 51%
- Classical Music: 51%
- Play (non-musical): 48%
- Opera: 48%
- Ballet: 47%
### Activities Defined as “Culture”

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historic Attraction/Museum</td>
<td>69</td>
</tr>
<tr>
<td>Art/Design Museum</td>
<td>63</td>
</tr>
<tr>
<td>Community Festival/Street Fair</td>
<td>62</td>
</tr>
<tr>
<td>Music Festival</td>
<td>59</td>
</tr>
<tr>
<td>Natural History Museum</td>
<td>57</td>
</tr>
<tr>
<td>Public/Street Art</td>
<td>54</td>
</tr>
<tr>
<td>Food and Drink Experience</td>
<td>52</td>
</tr>
<tr>
<td>Musical</td>
<td>51</td>
</tr>
<tr>
<td>Classical Music</td>
<td>51</td>
</tr>
<tr>
<td>Play (non-musical)</td>
<td>48</td>
</tr>
<tr>
<td>Opera</td>
<td>48</td>
</tr>
<tr>
<td>Ballet</td>
<td>47</td>
</tr>
</tbody>
</table>
This presents a complete paradigm shift.
Audiences do not place priority on whether an activity is “culture” or not.

Now, culture can be anything from Caravaggio to Coachella, Tannhäuser to taco trucks.
But if the traditional notion of “culture” is extinct, what is culture’s purpose in a new and increasingly complex world?
Culture’s definition may be in flux, but its value can be greater than ever . . .

. . . if we can re-assert its meaning in this radically changed landscape.
Fortunately, the very audiences that are breaking down the definition of culture are also helping to rebuild a new one.
Transforming Perspectives

“Having it change the way you think or challenging the norms. Anything that makes you feel anything and question what you already know.”
Building Community

“Building stronger communities by bringing people who may not think they have much in common together.”
Educating the Public

“Broadening my horizons, understanding of life and situations, and helping me learn about other peoples of the world.”
Fostering Empathy

“Bringing people of many different backgrounds together, and cementing the fact that our world is better for having so many diverse cultures. It needs to bring understanding and acceptance.”
The New Cultural Consumer
In order to understand this paradigm shift, we need to look into the hearts and minds of the people who are driving it: cultural consumers.
— What is the mindset of this new cultural consumer?
— Why do they engage with culture in the first place?
— What causes them to stay away?
The single greatest motivator:

Having fun.
Motivators For Cultural Participation

- Having fun: 81%
- Interest in the content: 78%
- Experiencing new things: 76%
- Feeling less stressed: 76%
- Learning something new: 71%
- Feeling inspired: 69%
- Interacting with others: 68%
- Feeling transported: 67%
- Feeling welcome: 64%
- Gives life a deeper meaning: 61%
- Connecting to my community: 56%
- Bettering health/well-being: 55%
- Grew up participating: 53%
- Being able to go by myself: 50%
Motivators For Cultural Participation

Having fun

- Interest in the content: 78%
- Experiencing new things: 76%
- Feeling less stressed: 76%
- Learning something new: 71%
- Feeling inspired: 69%
- Interacting with others: 68%
- Feeling transported: 67%
- Feeling welcome: 64%
- Gives life a deeper meaning: 61%
- Connecting to my community: 56%
- Bettering health/well-being: 55%
- Grew up participating: 53%
- Being able to go by myself: 50%
Audiences also have a variety of other important reasons for putting cultural activities at the top of their list.
Motivators For Cultural Participation

- Having fun: 81%
- Interest in the content: 78%
- Experiencing new things: 76%
- Feeling less stressed: 76%
- Learning something new: 71%
- Feeling inspired: 69%
- Interacting with others: 68%
- Feeling transported: 67%
- Feeling welcome: 64%
- Gives life a deeper meaning: 61%
- Connecting to my community: 56%
- Bettering health/well-being: 55%
- Grew up participating: 53%
- Being able to go by myself: 50%
Audiences seek out culture as a critical element of their personal development and exposure to new ideas.

This desire for self-improvement is consistent across generations.
Motivators For Cultural Participation (By Generation)

- **Experiencing new things**: Millennials 77, Gen X 76, Baby Boomers 77, Pre-War 74
- **Learning something new**: Millennials 71, Gen X 71, Baby Boomers 70, Pre-War 74
One of the most surprising findings is that audiences of all ages are also choosing culture as a major form of releasing stress.
Motivators For Cultural Participation

- Having fun: 81%
- Interest in the content: 78%
- Experiencing new things: 76%
- Feeling less stressed: 76%
- Learning something new: 71%
- Feeling inspired: 69%
- Interacting with others: 68%
- Feeling transported: 67%
- Feeling welcome: 64%
- Gives life a deeper meaning: 61%
- Connecting to my community: 56%
- Bettering health/well-being: 55%
- Grew up participating: 53%
- Being able to go by myself: 50%
When it comes to understanding why culture can drive audiences away, personal relevance is critical.
Barriers to Cultural Participation

1. It’s not for someone like me
2. I didn’t think of it
3. It’s inconvenient
4. I couldn’t find anyone to go with
5. Its value is not worth the cost
Addressing the reasons why this barrier exists is one of the most important challenges for organizations moving forward.
The New Cultural Consumer

Spotlight Stats
Early exposure matters.

Frequent attendees are 39% more likely to participate because they grew up doing it.
Accessibility without empathy will backfire.

People with disabilities are

59% more likely to avoid traditional cultural activities because of a negative experience.
Diversity means representation.

People of color are 82% more likely to stay away because activities don’t reflect people of a range of backgrounds.
The Omnivorous Experience
The first step is getting audiences in the door, but what do they want from cultural experiences once they arrive?
Many have tried to segment audiences into experiential typographies: grouping people based on their desired characteristics of an experience.
But in 2017, there is no one ideal type of cultural experience.

Audiences have different needs and wants at different times—or even simultaneously.
Characteristics of an Ideal Cultural Activity

- Social: 34
- Interactive: 32
- Lively: 31
- Hands-On: 30
- Active: 28
- Calm: 24
- Immersive: 23
- Reflective: 20
Characteristics of an Ideal Cultural Activity (Overlaps)

Of those who choose “calm,” 15% also chose “active.”
Characteristics of an Ideal Cultural Activity (Overlaps)

Of those who choose “reflective,” 24% also chose “social.”
2014

Cultural Omnivores:
Instead of focusing on one type of activity, culture goers were sampling various forms.
Experience Omnivores: Audiences now hunger for and expect experiences that suit their every need and mood.
Cultural Organizations Can React in One of Two Ways

- Portfolio approach
- Singular focus
The Omnivorous Experience

Spotlight Stats
To go it alone or not: audiences want both.

An average of 78% of those motivated to go alone also want to interact with others.
Culture connects us to reality, and lets us escape it.

Over

80%

of those who participate to connect to their community also want to be transported.
Cultural diehards always want something new and different.

Frequent attendees are 94% more likely to stay away if the experience is seen as unchanging.
The Digital Dilemma
Technology and media have fundamentally altered how people engage in every facet of life, including culture.
Audiences have a range of perspectives on how digital technology currently enhances or detracts from their experience.
Top Reasons Why Digital Appeals in Cultural Activities

1. Access to more detailed info
2. Activity is shareable digitally
3. Deeper understanding of content
4. Makes the activity feel new
For others, however, cultural experiences are more authentic, focused, and engaging without digital.
Top Reasons Why Analog Appeals in Cultural Activities

1. Feels more authentic
2. More focus on the activity
3. Less complicated
4. Better connection to content
Overall, however, audiences are very open to future digital experiences across cultural activities.
Desire for Digital Experiences in Cultural Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Science, Tech, Nat History Museum</td>
<td>86</td>
</tr>
<tr>
<td>Art/Design Museum</td>
<td>81</td>
</tr>
<tr>
<td>Popular Music</td>
<td>80</td>
</tr>
<tr>
<td>Zoo, Aquarium, Botanical Garden</td>
<td>80</td>
</tr>
<tr>
<td>TV/Film</td>
<td>79</td>
</tr>
<tr>
<td>Regional/Contemporary Dance</td>
<td>78</td>
</tr>
<tr>
<td>Community Festival/Street Fair</td>
<td>71</td>
</tr>
<tr>
<td>Opera</td>
<td>71</td>
</tr>
<tr>
<td>Musical</td>
<td>67</td>
</tr>
<tr>
<td>Ballet</td>
<td>65</td>
</tr>
<tr>
<td>Public Park</td>
<td>65</td>
</tr>
<tr>
<td>Classical Music</td>
<td>64</td>
</tr>
<tr>
<td>Play (Non-Musical)</td>
<td>60</td>
</tr>
</tbody>
</table>
The future of digital lies in identifying how it can deepen the cultural experience in ways nothing else can.
When exploring a new digital strategy, start by asking:
— Does it enrich or distract?
— Will it simplify the experience, or add unnecessary complexity?
— Does it feel authentic?
The Digital Dilemma

Spotlight Stats
For parents (and families), tech is a plus.

Parents are 52% more likely to say wearable technology would enhance a cultural experience.
Social media can have a broader impact

People of color are 31% more likely to say integrating social media would enhance the experience.
The Loyalty Revolution
Since 2011, there has been a flat or downward trend in memberships and subscriptions — a “cultural promiscuity” phenomenon that continues in 2017.
Visual Arts Memberships

- 2011: 26
- 2017: 22

Performing Arts Subscriptions

- 2011: 23
- 2017: 21
This doesn’t mean that people aren’t loyal.
Audience Loyalties

- Restaurants or bars: 58%
- Retail stores: 48%
- Sports teams: 44%
- TV networks, websites, streaming services: 36%
- Schools or universities: 36%
- Political parties: 31%
- Cultural organizations: 27%
- Airlines: 26%
- Gyms: 20%
<table>
<thead>
<tr>
<th>Category</th>
<th>Audience Loyalty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurants or bars</td>
<td>58</td>
</tr>
<tr>
<td>Retail stores</td>
<td>48</td>
</tr>
<tr>
<td>Sports teams</td>
<td>44</td>
</tr>
<tr>
<td>TV networks, websites, streaming services</td>
<td>36</td>
</tr>
<tr>
<td>Schools or universities</td>
<td>36</td>
</tr>
<tr>
<td>Political parties</td>
<td>31</td>
</tr>
<tr>
<td>Cultural organizations</td>
<td>27</td>
</tr>
<tr>
<td>Airlines</td>
<td>26</td>
</tr>
<tr>
<td>Gyms</td>
<td>20</td>
</tr>
</tbody>
</table>
Outside of culture, audiences view loyalty as a personal relationship.

Their ideal partner is:
- trustworthy
- consistent
- kind
Motivators for Loyalty

- Trustworthiness: 61%
- Consistent quality: 57%
- Customer service: 55%
- Reputation: 50%
- Discounts: 47%
- Rewards: 43%
- Personalization: 42%
- Shared values: 41%
- Content/products: 41%
Motivators for Loyalty

- Trustworthiness: 61%
- Consistent quality: 57%
- Customer service: 55%
- Reputation: 50%
- Discounts: 47%
- Rewards: 43%
- Personalization: 42%
- Shared values: 41%
- Content/products: 41%
Importantly, audiences value not only how cultural organizations treat them, but also how these organizations impact the rest of the world.
Motivators for Joining a Loyalty Program

- Money goes to good cause: 38%
- Entry deals or benefits: 34%
- Ability to bring guests: 31%
- Helped avoid the crowds: 27%
- Discounts from gift store: 22%
- Also gave access to other orgs: 17%
- Personalization: 16%
- Simplified planning: 14%
Motivators for Joining a Loyalty Program

Money goes to good cause 38
Entry deals or benefits 34
Ability to bring guests 31
Helped avoid the crowds 27
Discounts from gift store 22
Also gave access to other orgs 17
Personalization 16
Simplified planning 14
This is a tipping point.

New models of loyalty must forge meaningful, reciprocal, and long-lasting relationships.
The Loyalty Revolution

Spotlight Stats
When it comes to parents’ loyalty, keep it simple.

Parents are

21%

more likely to join a loyalty program that simplifies their planning.
For younger generations, to tweet is to care.

Over

\[
\frac{1}{3}
\]

of younger generations feel that engaging on social media is an act of loyalty.
The Case for Support
Audiences regularly experience many forms of culture — film, music, festivals, and more — that do not solicit or depend on donations to exist.
And yet, audiences still give consistently to organizations that do.
Plans to Donate to Culture

![Bar chart](chart.png)
The top reasons for donating to culture all relate to one thing:

Social impact.
Motivators for Donating to Culture

- Believe in mission: 63%
- Want to impact the community: 54%
- Want to impact the world: 51%
- Admire the organization: 50%
- Want to support artists: 45%
- Know it needs support: 45%
- Worried about its funding: 30%
Motivators for Donating to Culture

- **Believe in mission**: 63%
- **Want to impact the community**: 54%
- **Want to impact the world**: 51%
- **Admire the organization**: 50%
- **Want to support artists**: 45%
- **Know it needs support**: 45%
- **Worried about its funding**: 30%
Audiences prefer to give to organizations that they believe have the greatest impact — but culture often doesn’t fit the bill.
Other causes have greater impact 25
I only give to one cause 25
Not personally important to me 22
My taxes already help 21
They don’t need more funding 8

Reasons for Not Donating to Culture
Reasons for Not Donating to Culture

- Other causes have greater impact: 25%
- I only give to one cause: 25%
- Not personally important to me: 22%
- My taxes already help: 21%
- They don’t need more funding: 8%
Audiences want to see their money translate to clear, measurable, and tangible impact — aligning strongly with causes such as health, education, and humanitarian relief.
With social impact as the main driver, cultural organizations need to work harder to measure and articulate their distinct impact, and prove how they are essential to people’s lives and livelihood.
To create the “new philanthropy,” the answer is not to shift the approach, but to rethink it from every angle:
- Establish a “dialogue-based relationship”
- Focus on results and impact
- Look beyond the field for effective models
- Understand generational differences
The Case For Support

Spotlight Stats
For Pre-Wars, community comes first.

Pre-Wars are 55% more likely to give to community organizations.
Culture and social change are intertwined.

People of color are 71% more likely to donate to civil and human rights organizations.
Sponsorship of culture is a business win.

58% say they feel good about doing business with corporations that support culture.
Conclusion: Five Key Takeaways
Redefining the very meaning of culture is a major disruptor, necessitating a reassessment of experiences and services offered, a remapping of competition, and a reconceptualization of the cultural spaces of the future.
#2 Meaning

For culture to matter, it must enable people to find or make meaning. At this particular socio-political moment, reducing stress, providing fun, and offering perspective are pre-conditions for this to happen.
#3 Tech

Audiences have nuanced attitudes towards digital versus analog for enhancing their cultural experience; one approach is unlikely to address all needs.
#4 Loyalty

With loyalty now rooted in trust, consistency, and kindness, empathic, service-focused relationships will replace existing transactional models.
The future of cultural philanthropy will be interest-tailored and impact-driven, with greater emphasis on “SROI” – Social Return on Investment.
CULTURE TRACK '17

LaPlaca Cohen  Kelton

CultureTrack.com  @CultureTrack  #CultureTrack

All rights, title and interest, including copyright interests, patents, and any other intellectual property rights, in and to any and all reports, summary level data, analyses or materials contained herein are owned wholly and exclusively by LaPlaca Cohen Advertising Inc. Culture Track is a registered trademark of LaPlaca Cohen Advertising Inc.