

# Making Culture Count 1.0

**New Insights on Engaging Arts Audiences**

March 20, 2003

THE  
NEW YORKER

LaPlaca Cohen

Advertising Branding Marketing Communications to Cultural Audiences

# Noteworthy Findings

## ▪ Influential Factors

- Core and General Audiences are influenced by the following factors when deciding to attend cultural events:
  - Interest in a specific performer or artist (Core 98%, General 94%)
  - Convenient time or location (Core 83%, General 89%)
  - Friend’s recommendation (Core 83%, General 82%)
- Core Audiences are more influenced by recommendations from trusted critics (Core 73%, General 37%).
- General Audiences are more influenced by outside factors such as transportation arrangements / convenience of parking (General 56%, Core 43%).

# Noteworthy Findings

## ■ Role of Cultural Institutions

- Core Audiences felt that experiencing art and learning were the most important reasons for making the arts and cultural activities part of their life.
- General Audiences were more concerned with supporting friends or family members and learning about / celebrating cultural heritage.

	Core Audience	General Audience
Experience the high quality of the performance / art	84%	97%
Interest in learning something about another time or culture	86%	92%
Desire to learn about or celebrate cultural heritage	78%	72%
Support organizations or events that are important to my community	71%	70%
Support a friend or family member who is involved	82%	57%
Be “in the know” about the latest trends and tastes	33%	35%

# Noteworthy Findings

## ■ Barriers to visitation

- Core and General Audiences agreed that the main barriers preventing them from attending cultural events were:
  - The program or event was unappealing (Core 71%, General 67%).
  - The Program or event cost too much (Core 54%, General 63%).
    - Core Audiences were slightly more concerned about the program or event whereas General Audiences were slightly more concerned about the cost.
- Good news is that a small percentage of the Core and General Audiences felt they were prevented from attending cultural events because the organization is not welcoming (Core 6%, General 11%).

# How We Conducted the Survey

- Review of Objectives
- Selection of Research Topics
- Sampling Methodology and Questionnaire
- The New Yorker Compass
- Why The New Yorker?
- Key Insights

# Research Objectives

- Decipher motivating factors driving or hindering cultural participation
  - Uncover influences on consumer motivations
- Distinguish attitudes among frequent, infrequent and non-attendees
  - Identify differences between Compass (core) members and the general population
- Define culture (today)
- Determine consumer's sources of information regarding cultural activities

# Topic Selection



*“An excellent selection, Madam. Yours was O.K., too, sir.”*



# The Questionnaire



*“Meaningless statistics were up one-point-five per cent this month over last month.”*

# Sampling Methodology and Questionnaire

- 100% on-line questionnaire
  - 32 questions; 29 multiple choice and 3 open end
- Email invitation to participate in a definitive survey on culture participation
  - New Yorker Compass member panel: 5,000 New Yorker readers
  - General US population sample: 500 non-readers (mirrored the US population- gender, age and income parameters)
- Administered by separate 3rd party research vendor- Socratic Technologies
  - Survey in-field for 3 days
  - Fast results (from field to analysis in just 30 days)

# The New Yorker Compass On-line Survey

Netscape: New York Compass

Location: <http://www.newyorkercompass.com/eval.asp?PID=1&bok=yes>

HOME JOIN MEMBER SERVICES YOUR PROFILE YOUR REWARD ACCOUNT LOGIN

## THE NEW YORKER COMPASS

When it comes to identifying trends on the horizon, readers of *The New Yorker* know their way around. An exclusive online forum, The New Yorker Compass gathers their seasoned guidance via topical web-based surveys throughout the year.

Surveys will run the gamut from the effectiveness of promotional events and programs to new concepts from our advertisers. You will also have the opportunity to share your opinion on the content of the magazine itself. Survey participation is always 100% voluntary, and all information provided will remain confidential.

Join The New Yorker Compass today and assist us as we steer the magazine's business into the future. As a token of our thanks for joining, The New Yorker will send Compass members a computer desktop comprised of vintage New Yorker covers.

**POINT THE WAY. JOIN TODAY.**

**Already a member?** Login below to access the secure areas of the site, including functionality to update your email address or other contact information.

**LOGIN NOW.**

Any thoughts on this weeks New Yorker?

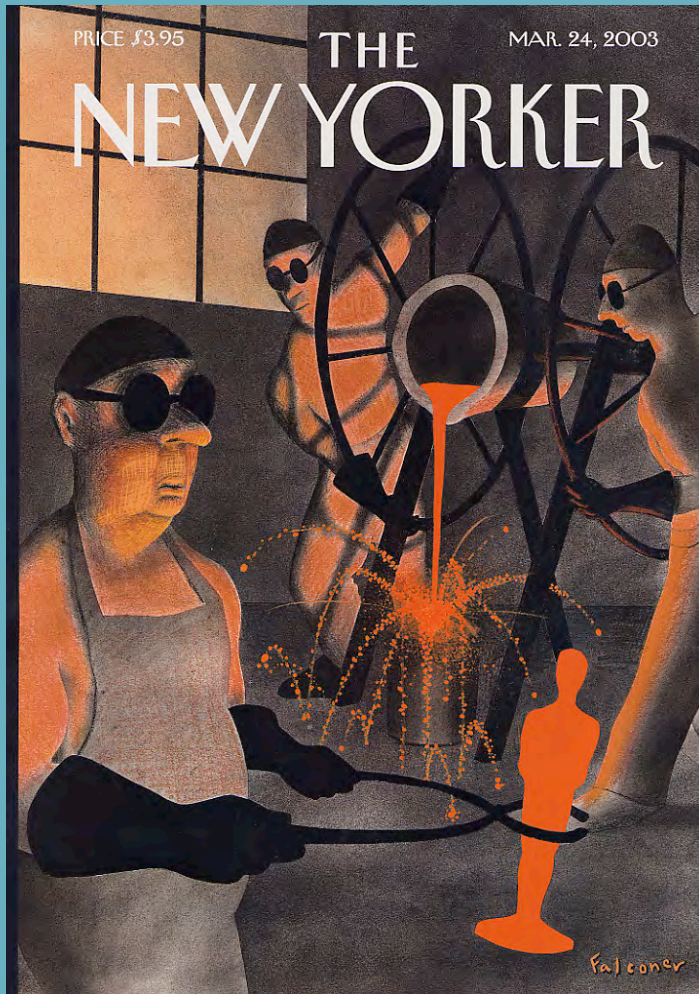
Tell us!

(Maximum 250 characters)

# The New Yorker Compass

- On-line reader panel of 5,000+ New Yorker readers who eagerly share opinions regularly
  - Unprecedented response rates from readers: 22-45%
    - Used for music, technology, luxury goods, etc.
- Replacing guess work with real facts
  - Anecdotal reference to heavy culture participation is now verified
- Instant, actionable results

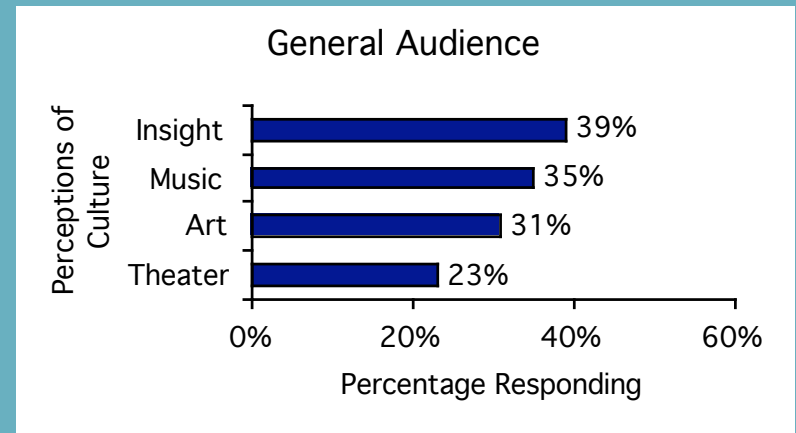
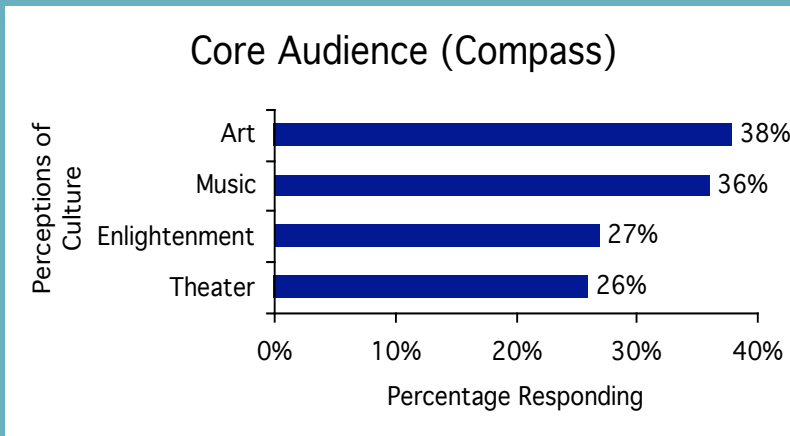
# Why The New Yorker?



- Passionate New Yorker readers show heavy involvement with culture
  - **84%** cite that culture and entertainment influences their personal style
  - **50%** visited an art gallery/auction, museum, live theater, opera, orchestra, and/or dance performance in the past 30 days
- Regular cultural coverage/reporting in every issue
  - Goings On About Town, The Critics set the pace for reader's cultural calendar each week
- Pre-existing & deep client base of cultural institutions
  - 161 Culture, Arts & Entertainment ad pages in 2002

# Key Insights: Definition of Culture

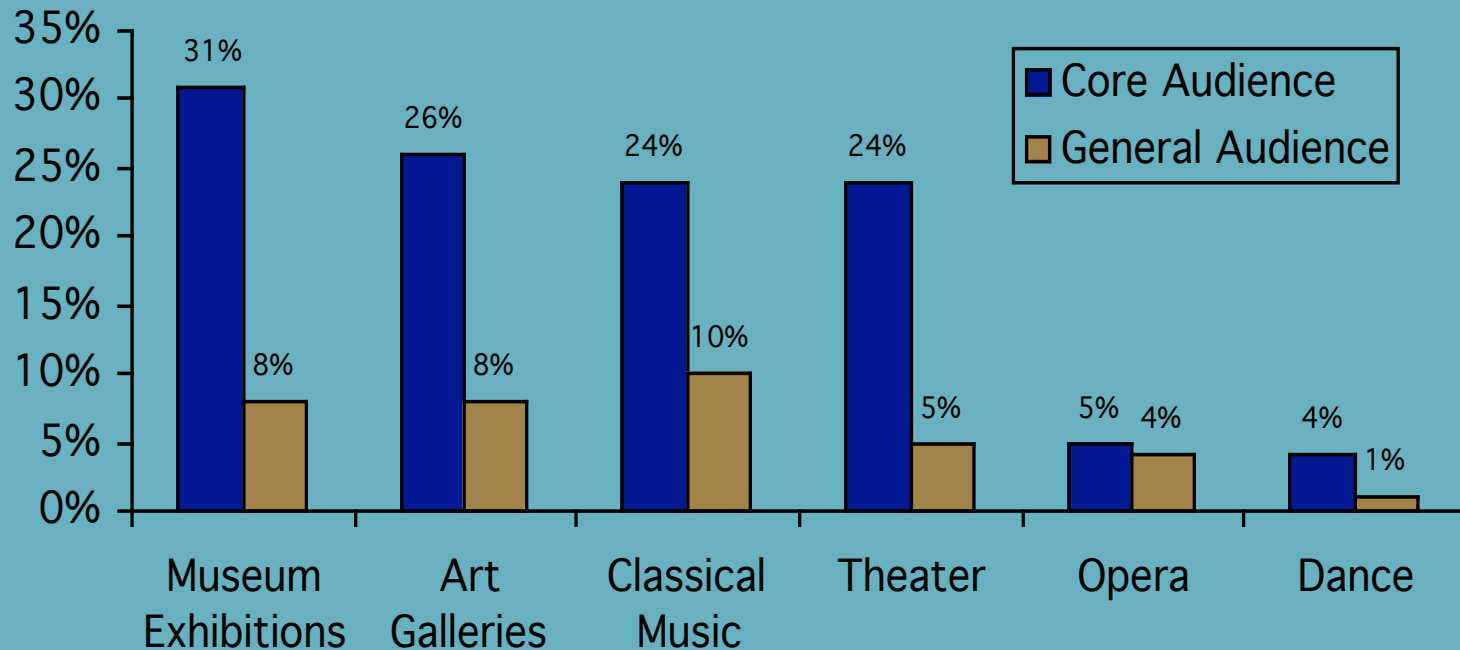
Core and General Audiences appear to share similar perceptions of culture.



Or do they . . .

# Key Insights: Consumer Behavior

In general, the findings enable us to identify Core Audiences as those at least twice as likely to frequently attend a cultural event.



# Key Insights: Participation Trends

While most Americans flocked to restaurants and musicals, compass members upped attendance at museums, galleries, and classical music

## Core Audience (Compass)

Increased participation:

- Dining out (+9%)
- Attending museum exhibitions (+7%)
- Visiting art galleries (+5%)
- Attending classical music performances (+1%)

## General Audience

Increased participation:

- Dining out (+15%)
- Attending movies (+5%)

# The Need for Cultural Research

- Creating a template for a wide range of arts-related organizations
  - Museums
  - Performing Arts
  - Sponsors of Cultural Programs
  
- Providing data that are:
  - Relevant
  - Reliable
  - Projectable

# Why “Making Culture Count”

- Two Meanings

- Getting on the “radar screen” of target audiences

- Core audiences

- General/ “persuadable” audiences

- Helping cultural organizations “count” audience attitudes and opinions

# Cultural Audience Research

- Current status
  - No relationship between size/stature of organization and use of research
  - Inherent limitations in existing research approaches
    - Scale
    - Scope
    - Perspective
    - Consistency
    - Timeliness



# Understanding Audience Attitudes



*“Cézanne has always been my man,  
but is he worth the trip to Philadelphia?”*



# Noteworthy Findings

- **Sources of Information Used** in deciding to attend a cultural event
  - On average, audiences used five sources of information when planning.
  - Print/newspaper use highest among advance planners (67%)
  - Internet use higher as planning timeframe gets shorter (Advance: 6%, Same day: 10%)
  - Editorial is more influential for older and more affluent audiences
  - Advertising is more influential for younger audiences
  - However, in absolute terms, advertising and editorial coverage are enormously important to both groups

<i>Sources of Information Used</i>	<i>Use Advertising as an information source</i>	<i>Use Articles as an information source</i>
Core Audience	90 %	98 %
General Audience	92 %	83 %

# Noteworthy Findings (continued)

## ▪ Planning Timeframe

- Majority (55%) plan to visit museums a few days in advance
- Majority (58%) plan to attend performing arts events well in advance
- General population tends to be more spontaneous than Core Audience
- The exception to these findings is when traveling to another city
  - Core audiences are much more likely to include a cultural activity
  - The activity is more likely to be visual arts than performing arts

<i>Type of cultural activities sought when traveling</i>	Visual Arts	Performing Arts
Core Audience	72%	47%
General Audience	31%	24%

# Noteworthy Findings (continued)

## ▪ **Younger versus Older Audiences**

- Younger audiences (ages 18 - 39) tend to be more spontaneous in planning a visit
  - More concerned about ability to purchase a ticket at the last minute (55%)
- Conversely, middle age (ages 40 - 59) to older (ages 60+) - and more affluent - audiences plan further in advance for both visual and performing arts
- Younger audiences are more price conscious (80%): middle age (37%) and older audiences (45%) are more concerned about convenience
- Younger audiences rely more on word of mouth
  - More influenced by a friend's recommendation (90%)

# Noteworthy Findings (continued)

## ▪ Younger versus Older Audiences (continued)

- Older audiences are more committed in membership and subscription levels

	Visual Arts			Performing Arts		
Age	18 - 39	40 -59	60+	18 - 39	40 -59	60+
Core Audience	23%	<b>44%</b>	33%	18%	<b>45%</b>	37%
General Audience	36%	<b>40%</b>	24%	22%	31%	<b>47%</b>

# Noteworthy Findings (continued)

## ■ Motivation Factors

- Top reason for Core Audience to purchase a performing arts subscription is content - i.e., specific repertoire or season (71%)
- Top reason for Core Audience to purchase a museum membership is *stature or reputation* of the organization (59%)
- Enjoyment is greatest benefit sought in both art forms (Visual Arts 42%, Performing Arts 56%) *however...*

	Visual Arts		Performing Arts	
	more interested in <i>learning</i> something from the experience	more interested in <i>exposing their children</i> to the arts	more interested in <i>learning</i> something from the experience	more interested in <i>exposing their children</i> to the arts
Core Audience	<b>31%</b>	44%	<b>23%</b>	41%
General Audience	25%	<b>64%</b>	19%	<b>63%</b>

# Noteworthy Findings (continued)

- Motivation Factors (continued)

- Both the Core Audience and General Audience agreed:

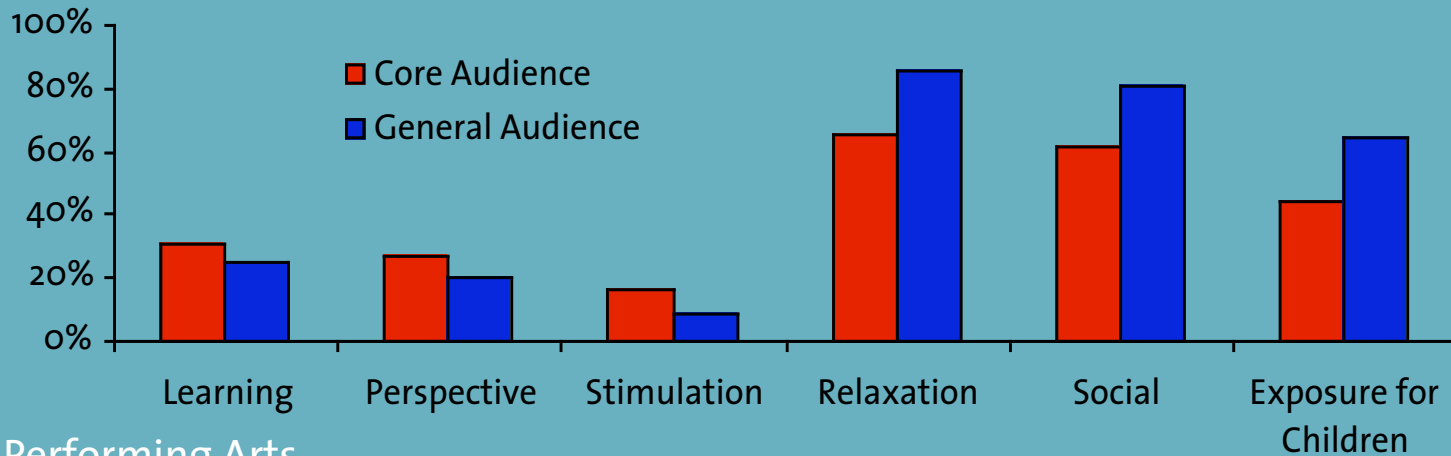
- Education is an extremely important benefit of the visual arts (95% and 90% respectively)

- Entertainment is an extremely important benefit of the performing arts (92% and 94% respectively)

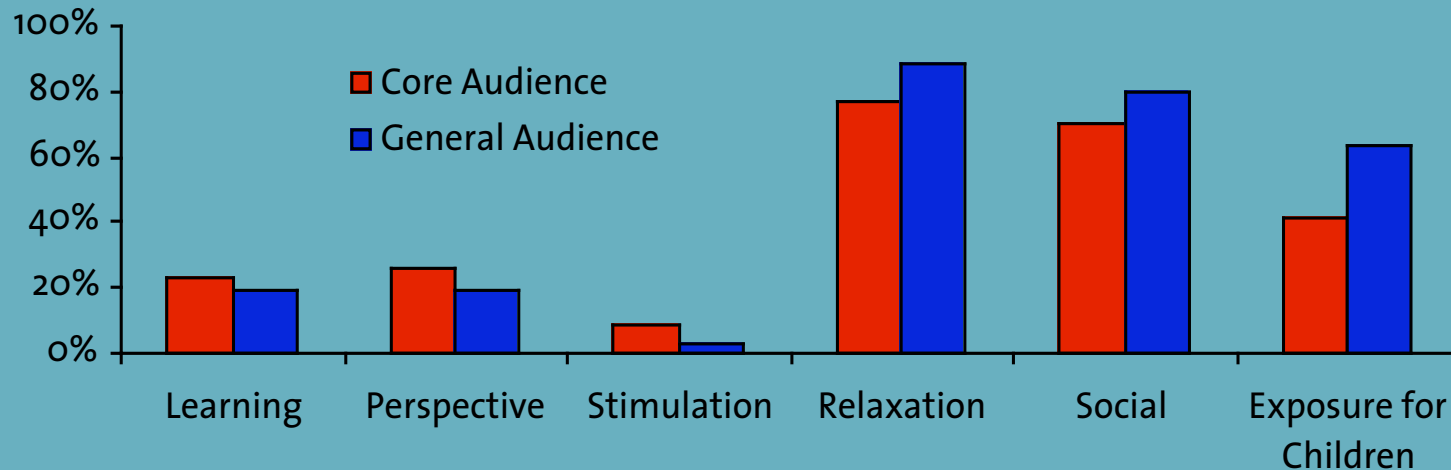
# Noteworthy Findings (continued)

However, there are notable difference among the audience groups:

## Visual Arts



## Performing Arts



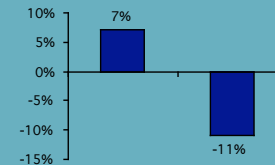
# Noteworthy Findings (continued)

## ▪ Attendance Habits versus One Year Ago

– The decline in the General Audience’s participation levels in these cultural areas overshadows any increased participation by the Core Audience:

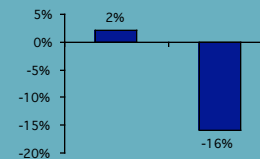
### — Art Museums

- Core audience increased attendance (+7%)
- General audience decreased attendance (-11%)



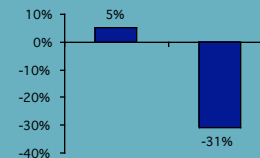
### — Classical Music

- Core audience increased attendance(+2%)
- General audience decreased attendance (-16%)



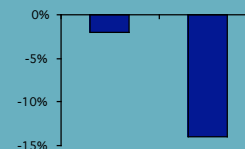
### — Opera

- Core audience decreased attendance(-5%)
- General audience decreased attendance (-31%)



### — Drama/Theater

- Core audience decreased attendance(-2%)
- General audience decreased attendance (-14%)



# Noteworthy Findings (continued)

## ▪ **Corporate Support and Sponsorship**

- For the majority of respondents in both groups, corporate sponsorship of the arts makes them think more highly of the corporation (58%)
- The majority of respondents in both groups also agree that audiences benefit from corporate arts support (77%)

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Thank you

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