

Cultural Audiences and the New Economy

Executive Summary



LaPlaca Cohen

Research Findings

Methodology

- In December 2008, LaPlaca Cohen and AMS Planning & Research partnered to field a national online survey to arts and cultural audiences.
- Demographics represent typical arts consumers. Nationally, over 1,200 individuals responded.
- The goal was to balance widespread news of fiscal challenges being faced by arts organizations with our observations of audience behavior.

Cultural Consumption

- Respondents reported participating in a range of arts and cultural activities in the past 12 months, with visiting art museums being the most common type of cultural participation.
- High levels of participation in multiple types of cultural activity implies a large cross-over between audiences, including cross-over between museum-goers and performing arts attendees.

Type of Activity	Attended ≥ 1 time in past year
Art Museum	75%
Popular Music Concert	69%
Musical Theater Performance	65%
Non-Musical Stage Play	58%
Dance Performance	42%
Classical Music Concert	40%
Jazz Concert	35%
Opera Performance	14%

n = 1,248

Q: In total, about how many times did you attend each of the following types of events over the last 12 months?

Why Culture?

- Respondents were asked to rank the importance of various factors in their decision to attend arts and cultural activities.
- Responses indicate that arts audiences are more influenced by seeking enjoyment and fulfillment than by familial or community obligation.
 - Among respondents with children in their homes, 76% say the arts offering a Family Activity is “Very” or “Extremely Important” in their decision to participate. (n=467)

Factor Influencing Decision to Attend Cultural Activity	“Very” or “Extremely Important”
Entertainment — Enjoyable way to spend time	88%
Relaxation — A good way to unwind	70%
Social — To spend time with friends and family	64%
Educational — To learn about other times, places, cultures	59%
Family Activity — Engaging children & family members	52%
Diversion — Escape everyday stress	51%
Endorsement — Show support for cultural activities in the community	34%
Staying Current — Being in the know about latest events	24%

n = 1,248

Attendance in the New Economy

- Looking forward, cultural consumers do not anticipate shying away from cultural activities, despite the current economic climate.

– Respondents were asked if and how they expected to change their attendance in cultural activities in the next six months.

- Of those respondents who hold a membership or subscription to an arts organization, the majority anticipate renewing their commitments.

	Decrease	Remain Same	Increase
Visual art exhibitions / presentations	6%	66%	28%
Performing arts events	7%	58%	35%

n = 1,248

	Unlikely to Renew	Undecided	Likely to Renew
Visual arts memberships (n = 228)	5%	26%	69%
Performing arts subscriptions (n = 188)	2%	20%	78%

Q: Do you expect your attendance at the following activities to increase significantly, increase somewhat, remain the same, decrease somewhat, or decrease significantly during the next 6 months?

Q: How likely are you to renew your memberships to visual arts organizations when they are up for renewal?

Q: How likely are you to renew your subscriptions to performing arts organizations when they are up for renewal?

Attendance in the New Economy

■ Respondents who anticipate maintaining or increasing participation in cultural activities in the coming months reveal that the dominant reasons for doing so are seeking aesthetic, intellectual, or emotional outlets.

- The majority of respondents with children say their arts involvement will continue because of their kids.
- For this reason, 80% will continue pursuing visual arts activity; 82% will continue attending performing arts events. (n=467)

Reason for Maintaining or Increasing Cultural Attendance	Agree that reason affects Visual Arts attendance	Agree that reason affects Performing Arts attendance
“I find beauty and inspiration in arts and cultural activities”	77%	77%
“I enjoy learning about new things through arts and cultural activities”	76%	74%
“I look to arts and cultural activities through for intellectual stimulation”	66%	69%
“It’s a good value for my entertainment dollars”	60%	64%
“I want to spend more meaningful time with family and friends”	57%	60%
“I feel the need to escape from stress of everyday life”	52%	59%
“I want my children to be more engaged in arts and culture”	48%	49%

n = 1,165

Q: How accurately do each of the following statements reflect your reasons for maintaining or increasing your arts and cultural attendance over the next 6 months?

Attendance in the New Economy

- Respondents were asked whether particular types of cultural programs would motivate them to engage in cultural activities.
- The leading responses focus on programs that address cost and convenience, potential barriers to cultural participation even in a strong economy.
 - Among respondents with children, 62% say they are “Very” or “Extremely Inclined” to participate in programs designed for families or children. (n=467)

Type of Program	“Very” or “Extremely Inclined” to Participate
Programs that accommodate my schedule	73%
Programs that offer discounted tickets	71%
Free events or exhibitions	70%
Educational programs about art, history, or culture	54%
Holiday-themed programs or events	50%
Programs that include opportunities to socialize	40%
Interactive programs where I / my family can participate	35%
Family / Childrens programs	32%

n = 1,248

Q: How inclined are you to engage in each of the following cultural events or activities in the months ahead?

Immediate Context

- The “No Place to Hide” Mindset

 - Economic climate fueled by uncertainty → increased anxiety

 - Affecting all sectors of society

 - Audience reluctance to commit to anything long-term

- Increased scrutiny of all purchases

 - Price Sensitivity

 - Heightened division between “essentials” and “non-essentials”

 - Reassessment of purchase patterns

- Decision-making based not on what’s in wallets now, but on not knowing where “bottom” is

- Bottom Line: The path to survival/success lies in:

 - 1. Ability to provide value

 - 2. Ability respond to current mindset: “be part of the solution”

Implications

Because people feel...

Cultural organizations must position themselves as...

Stressed

A calming escape

Disconnected

Social; a place to connect

Poor

A great value for money

Adrift

Full of beauty and inspiration

Uncertain

Authentic, lasting

Cautious

Essential