

Making Culture Count 2.0

April 15, 2004

LaPlaca Cohen | THE NEW YORKER

Agenda

- Year-Two Research Objectives
- Methodology
- Arts Participation Trends :
 - Performing Arts
 - Visual Arts
- New Findings and Insights

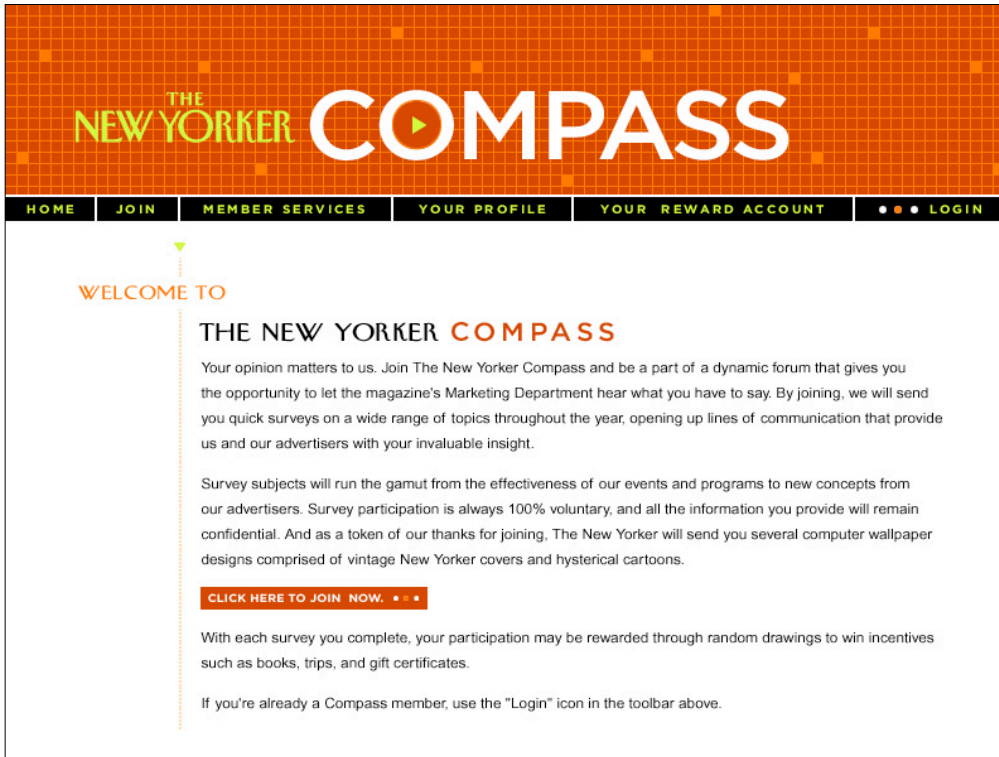
Year-Two Research Objectives

- Substantiate our inaugural findings regarding the attitudes, influences and motivations that impact participation in the arts.
- Identify trends which have emerged in the past year.
- Offer new insights into arts participation.

Methodology

- Email invitation to participate in a definitive survey on culture participation:
 - General US population sample: 1,500 non-New Yorker readers
 - New Yorker Compass member panel: 1,500 New Yorker readers
- 100% online questionnaire in three sections:
 - First section measured overall cultural participation among all respondents.
 - Second and third sections split sampled respondents (randomly routed to either a performing arts or visual arts survey track).
- Administered by third party research firm: Mediamark Research Interactive:
 - Survey in-field March 4-9, 2004
 - Fast results (from field to analysis in just 30 days)

The New Yorker Compass On-line Survey Tool



The screenshot shows the homepage of 'The New Yorker Compass'. At the top, there is a navigation bar with links for HOME, JOIN, MEMBER SERVICES, YOUR PROFILE, YOUR REWARD ACCOUNT, and LOGIN. The main content area features a 'WELCOME TO THE NEW YORKER COMPASS' heading. Below this, there is a paragraph explaining the purpose of the survey tool, followed by a 'CLICK HERE TO JOIN NOW.' button. Another paragraph describes the rewards for participation, and a final note mentions the login process for existing members.

WELCOME TO

THE NEW YORKER COMPASS

Your opinion matters to us. Join The New Yorker Compass and be a part of a dynamic forum that gives you the opportunity to let the magazine's Marketing Department hear what you have to say. By joining, we will send you quick surveys on a wide range of topics throughout the year, opening up lines of communication that provide us and our advertisers with your invaluable insight.

Survey subjects will run the gamut from the effectiveness of our events and programs to new concepts from our advertisers. Survey participation is always 100% voluntary, and all the information you provide will remain confidential. And as a token of our thanks for joining, The New Yorker will send you several computer wallpaper designs comprised of vintage New Yorker covers and hysterical cartoons.

[CLICK HERE TO JOIN NOW.](#)

With each survey you complete, your participation may be rewarded through random drawings to win incentives such as books, trips, and gift certificates.

If you're already a Compass member, use the "Login" icon in the toolbar above.

■ Making Culture Count 2.0 Results:

- 10.9% SSI general population sample response rate.
- 34.7% Compass panel response rate.

Introduction to Findings

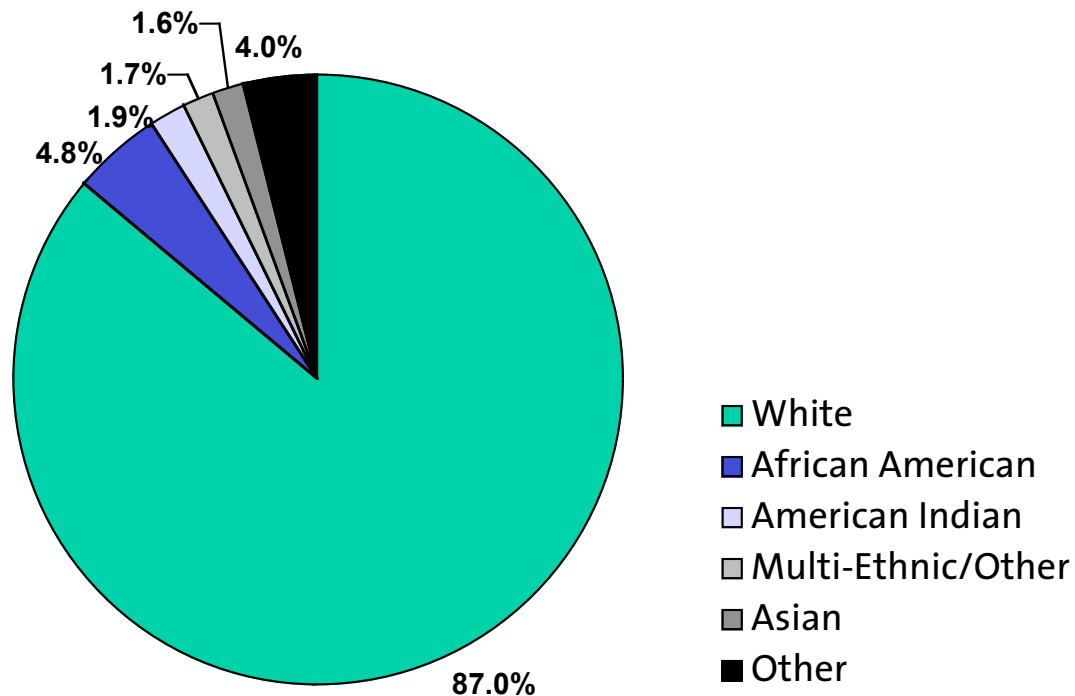
- Two audience segments analyzed:
 - General US Population:
 - National representative sample of the American public.
 - Balanced according to age and region within gender.
 - Weighted up to an on-line population totaling 165 million adults age 18+.
 - New Yorker Compass Member:
 - Composite of the total *New Yorker* audience.
 - Based on 6,500 readers who have elected to join an on-line forum managed by the Magazine's Marketing Department.

Introduction to Findings

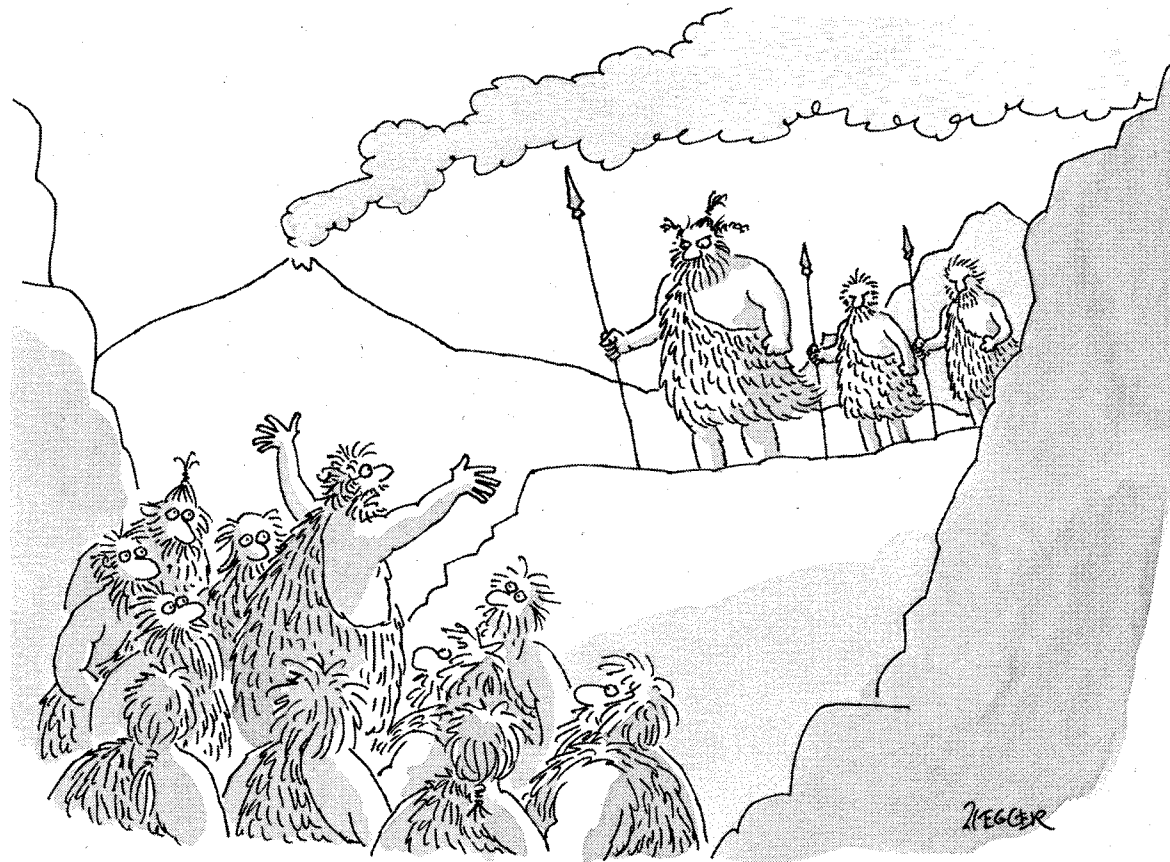
- The findings to be presented today are based solely on the General US Population (Average Attendees). Comparisons to The New Yorker Compass members will be shown where relevant statistical differences exist:
 - Average Attendees were segmented by current levels of arts participation within the past 12 months, with an emphasis on frequent attendees.
 - Frequent attendees were defined as anyone in the US who self-reported that they participate in any cultural activity at least once per month.

Breakdown of Respondents

- Ethnic and racial qualifiers allowed for more advanced segmentation of arts participants.



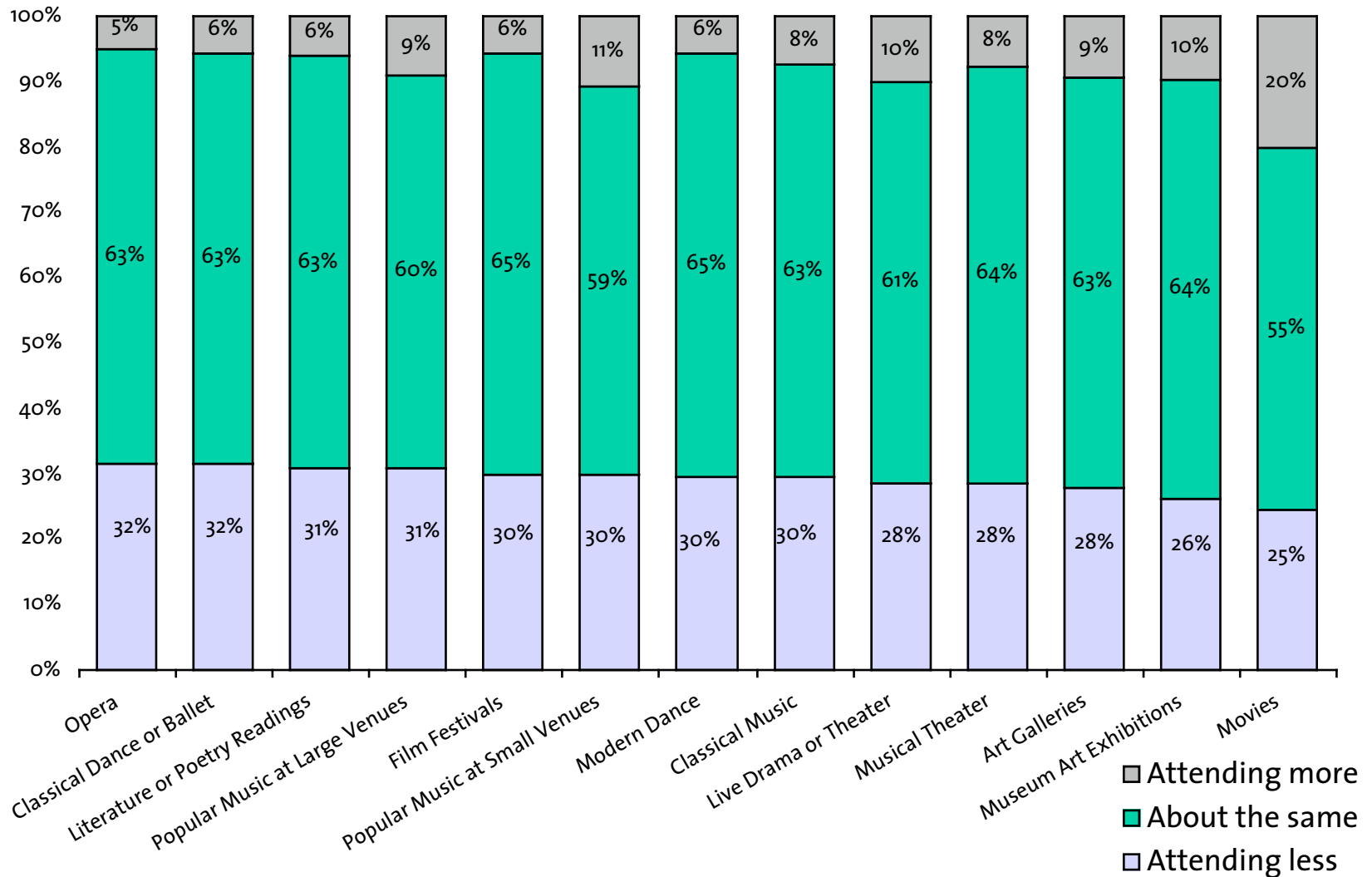
Arts Participation Trends



“Why is the arts budget always the first thing to be cut, when you know damn well it’s the only thing that separates us from the monkeys?”

Arts Participation Trends: Attendance

2003 Compared to 2004



Arts Participation Trends: Top Increases and Decreases

2004 Top Increases in Attendance	
Movies	20%
Popular music at small venues	11%
Live drama or theater	10%
Museum art exhibitions	10%
Art galleries	9%

2004 Top Decreases in Attendance	
Opera	32%
Classical dance or ballet	32%
Literature or poetry readings	31%
Popular music at large venues	31%
Film festivals	30%

Arts Participation Trends: Barriers to Attendance

- Much like 2003, higher participation costs and/or lack of appeal are the main barriers to attendance.
- Respondents claim to be less “time starved.”

Barriers	2003	2004	% Change
It costs too much	63%	65%	+3%
The program or event does not appeal to me	67%	53%	-21%
It's difficult to find the time to attend	48%	41%	-15%
It's too much of a hassle to get there	39%	40%	+3%

Arts Participation Trends: Shift in Influences

- Social aspects are more influential for 2004.
- External factors such as venue reputation and transportation declined in relative influence.

Influencers	2003	2004	% Change
Invited by family or friends	57%	83%	+46%
Friends recommendations	82%	82%	No change
Held at a venue whose selection you trust	66%	62%	-6%
Transportation arrangements	64%	54%	-16%

- **Note** Respondents could select multiple selections

Motivations

- Interest in a particular exhibition or performance remains the top motivator, followed by convenience and cost.

Motivators	2003 Rank	2004 Rank
Interest in a particular exhibition or performance	1	1
Interest in genre/period/style of event	4	2
Convenient time or location	2	3
Cost of admission	3	4
Event benefits a charity or cause that you support	5	5

Planning Time

- Advance planners tend to be older and spontaneous planners tend to be younger.
- When do you decide to attend a Performing Arts event?

Timing for Decision	2003	2004	% Change
Well in advance	43%	59%	+37%
A few days in advance	44%	35%	-20%
Same day as the event	13%	5%	-62%

- When do you decide to attend a Visual Arts event?

Timing for Decision	2003	2004	% Change
Well in advance	26%	40%	+54%
A few days in advance	52%	49%	-6%
Same day as the event	22%	11%	-50%

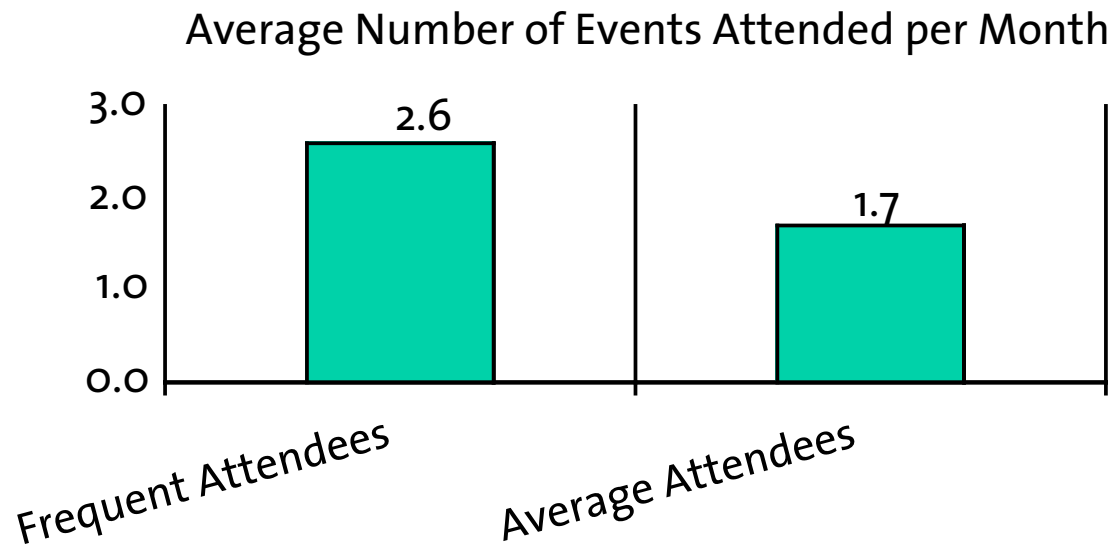
New Findings and Insights



"How come there's no feel-good performance art?"

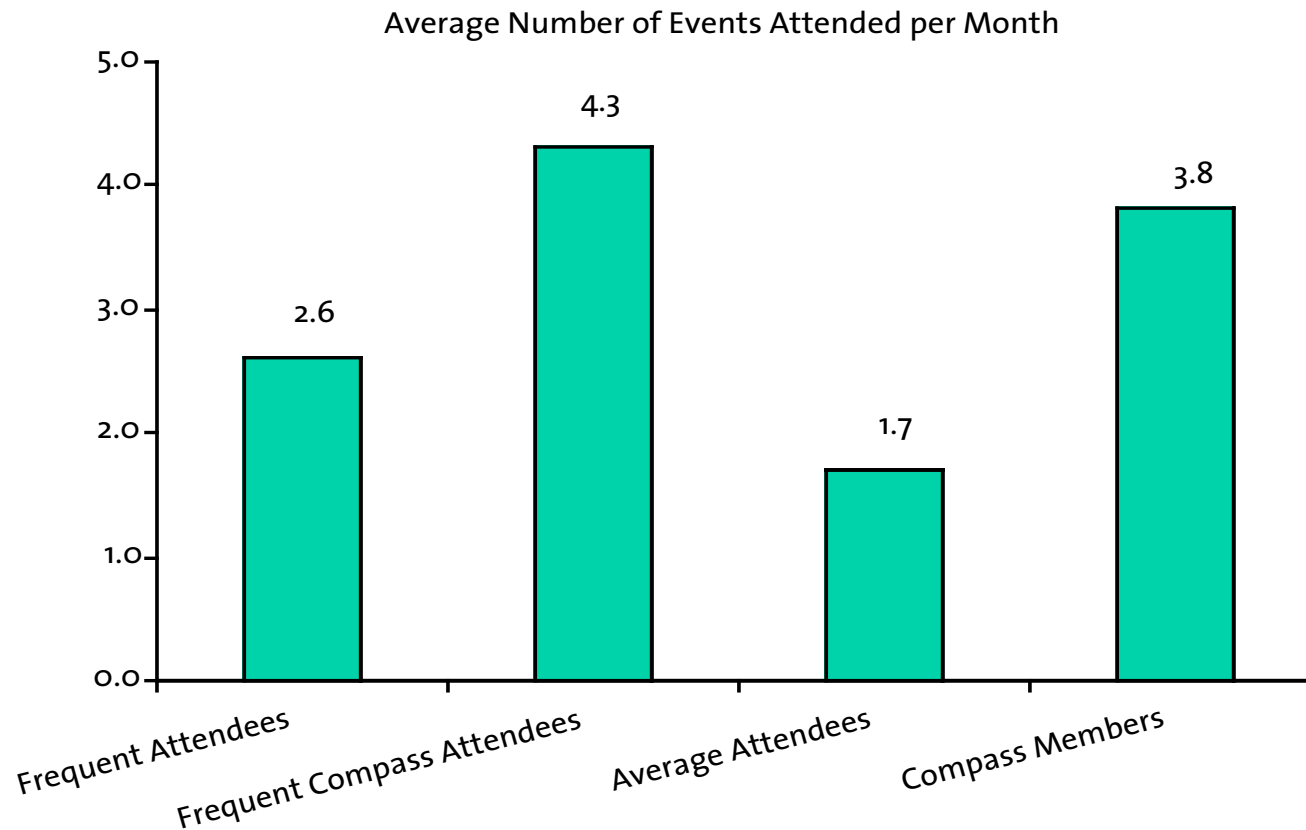
2004 General Population Frequent Attendees

- In 2003, General Population Frequent Attendees were identified as participating in cultural activities one or more times per month.
- In 2004, if extrapolated, this represents 46% Average Attendees (23.6% after “movies” removed from sample).
- Frequent Attendees attend 53% more events per month than Average Attendees.



2004 Compass Members

- Frequent Compass Members attend 65% more events per month than Frequent Attendees.
- Compass Members attend 225% more events per month than Average Attendees.



Influencers

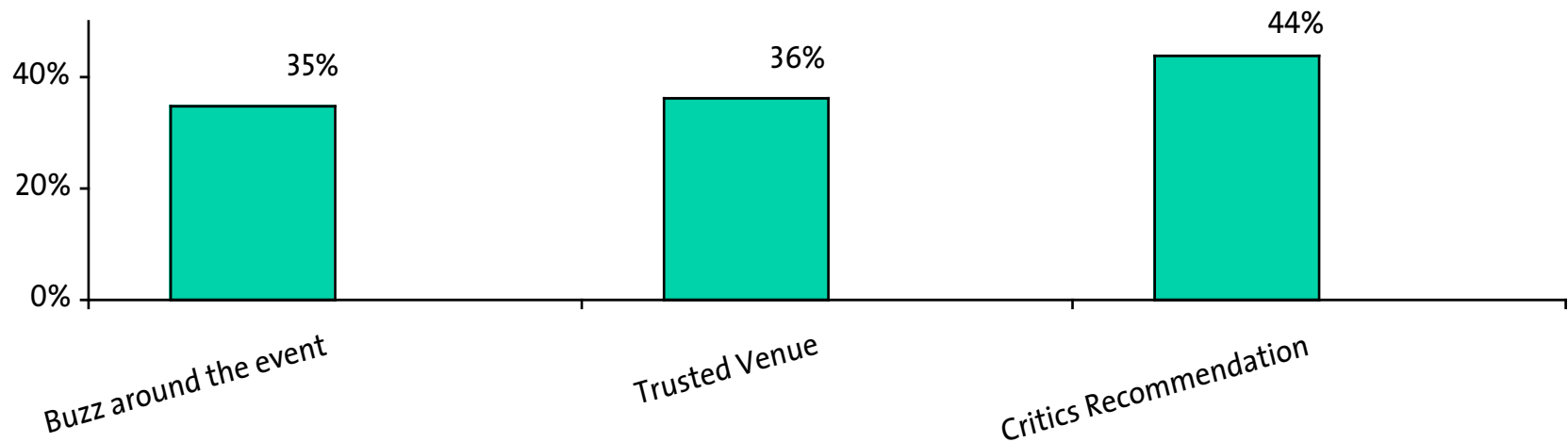
- All respondents, including frequent attendees, are influenced by social factors.

Influencers	Average Attendees	Frequent Attendees
Friends' Recommendations	82%	88%
Invited by friends or family	82%	89%
My spouse or partner is interested in attending	72%	77%

Influencers (cont.)

- Other influences beyond social factors were identified as attendance “levers.”

Additional Attendance “Levers” (% More likely than the Average Attendee)



The Role of the Arts

- Defined by social factors.
- Entertainment/enjoyment is by far the highest priority.

Roles	Average Attendees	Frequent Attendees	Index
Entertainment/enjoyment	60%	71%	118
Support a friend/family member involved	41%	47%	114
Experience the high quality of the performance/art	25%	33%	130
Escape everyday stress/rejuvenate	25%	32%	126
Interest in learning something about another time or culture	22%	30%	136
Support organizations/events that are important to my community	18%	23%	125
Desire to learn about or celebrate cultural heritage	16%	21%	127

Performing Arts

- Entertainment is still the most important benefit.
- Emphasis on education and exposure for children as benefits has moved up in importance this year.

Benefits	2003	2004
Pure entertainment	1	1
Educational	4	2
Broadening the mind	3	3
Exposure for children	7	4
Relaxation	2	5

Visual Arts

- Entertainment is still the most important benefit.
- Broadening of the mind and social benefits climb over last year.

Benefits	2003	2004
Pure entertainment	1	1
Broadening the mind	3	2
Educational	2	3
Social	5	4
Relaxation	4	5

Subscriptions and Memberships

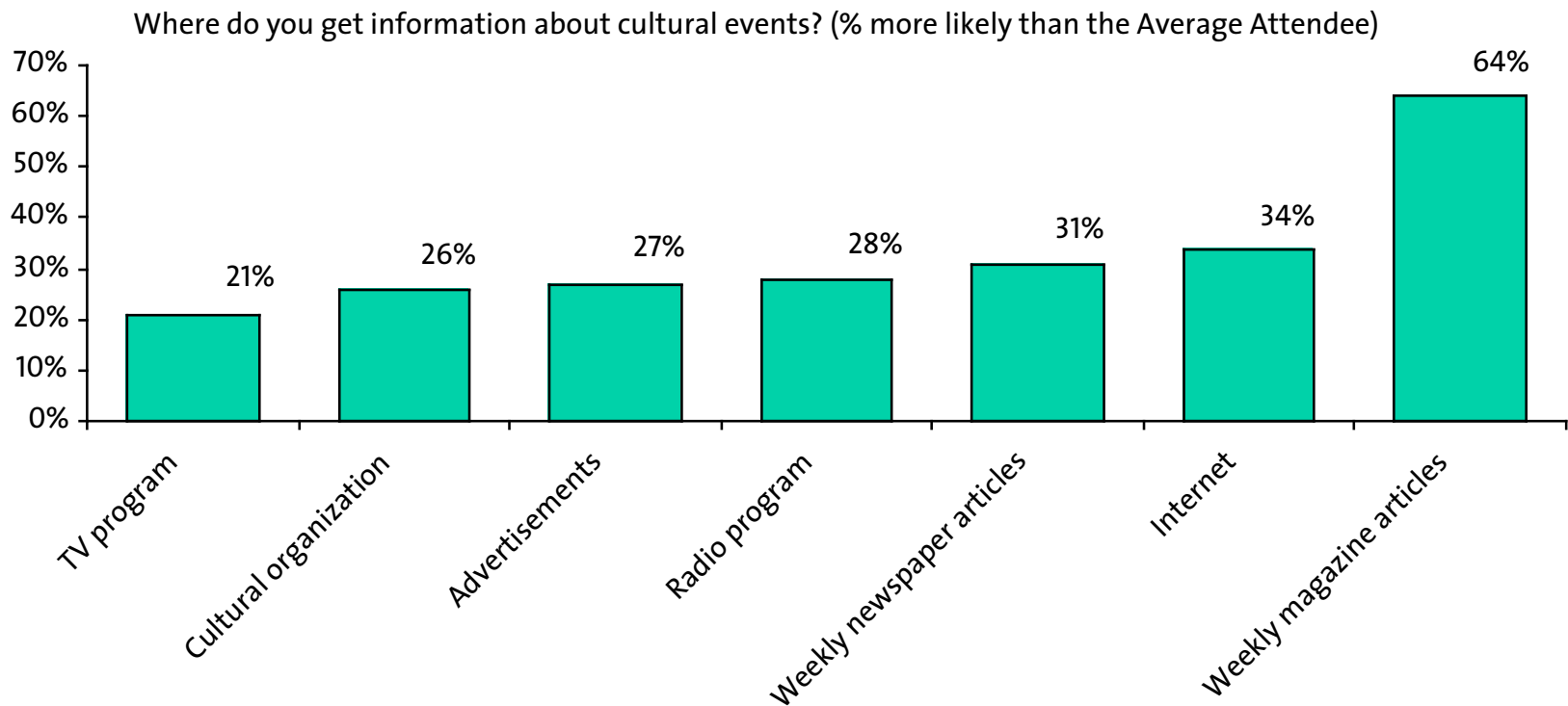
- Less Performing Arts subscriptions are being purchased.
- Number of Visual Arts memberships is relatively flat with last year.

Performing Arts – Subscriptions compared to a year ago	2003	2004
More	13%	3%
About the same	72%	74 %
Fewer	15%	23 %

Visual Arts – Memberships compared to a year ago	2003	2004
More	15%	11%
About the same	76%	78%
Fewer	9%	10%

Sources of Information

- Frequent attendees are proactive in searching out cultural activities.
- The typical American cultural participant is reactive in getting arts information. They largely depend upon being told about events by friends, family, acquaintances, or by mass media broadcast advertisements.

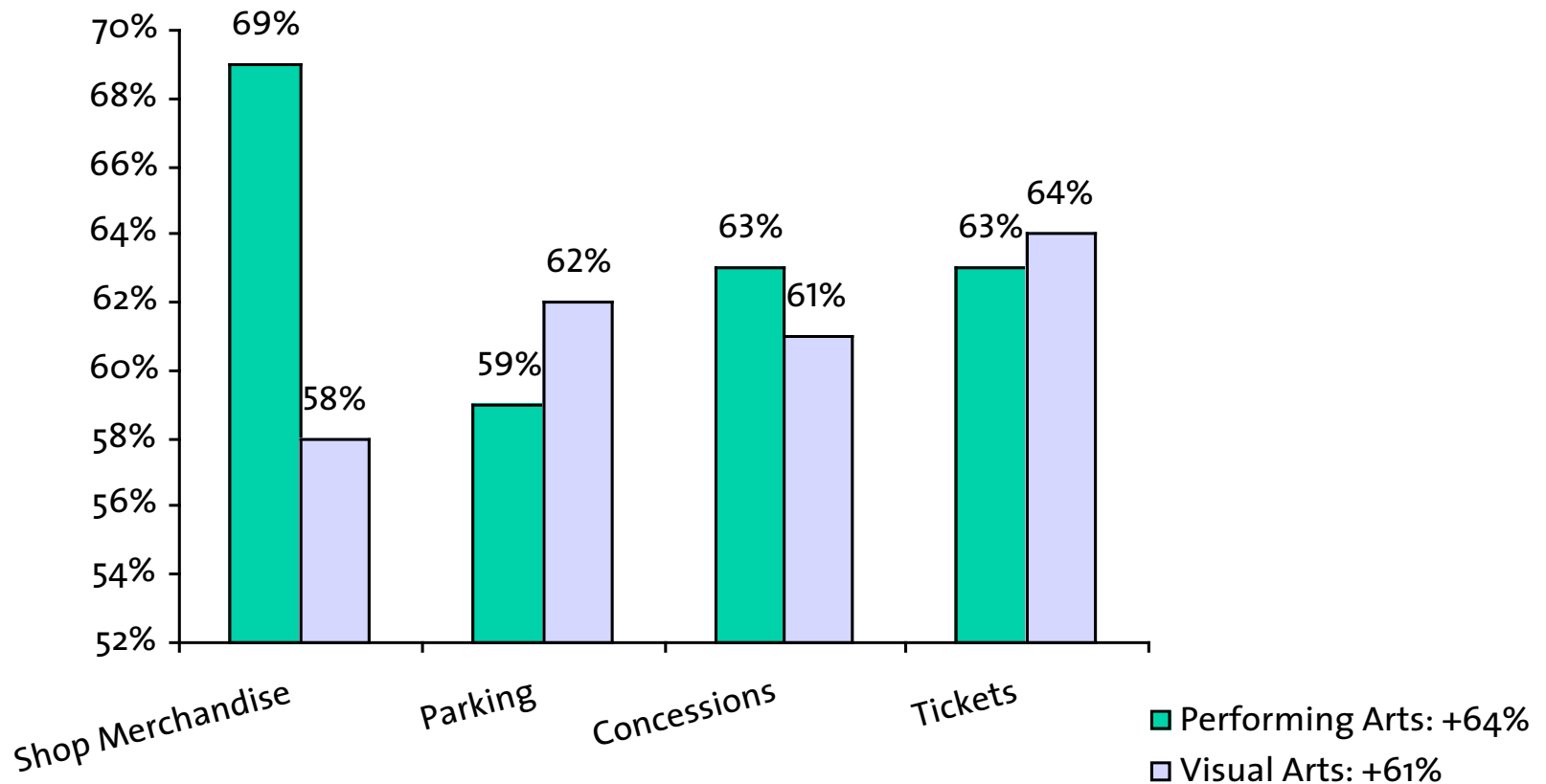


Sources of Information (cont.)

- Mature patrons (Age 55+) depend on:
 - Newspapers (both articles and ads)
 - Articles in weekly magazines like The New Yorker
 - Mailings direct from cultural organizations
- Patrons (Ages 30-54) depend on:
 - Radio ads
 - TV ads
 - Internet/Website content
- Younger patrons (Age 18-29) depend on:
 - Out of home advertising
 - Articles in weekly magazines like The New Yorker
 - Internet (both content and ads)

Spending by Frequent vs.. Average Attendees

% More in Annual Cultural Arts Spending by Frequent vs. Average Attendees



Incentives

- Incentives for bringing family and friends were increasingly more appealing in 2004 than in 2003.

Incentives	2003	2004	% Change
Incentives for bringing family or friends	26%	37%	+42%

Corporate Support of the Arts

- Frequent attendees are more responsive to corporate sponsorship of the arts.

Responses	Average Adults	Frequent Attendees	Index
Seeing corporations support the arts makes me want to purchase their products/services and/or increase the amount of patronage I give this corporation	33%	39%	119
Seeing corporations support the arts makes me more receptive to what they are saying	36%	41%	114
When I see corporations support the arts, it makes me feel good about doing business with this corporation	49%	55%	112
I notice when corporations support the arts and it makes me think highly of the corporation	44%	48%	110

Summary

- Participation is declining:
 - Impacted by price, not because of lack of time.
- Social aspects are even more important.
- All respondents are looking to be entertained by the arts:
 - Interest in a particular exhibition / performance is the top motivator.
- Audiences are planning ahead more than last year.
- Audiences get information from different sources:
 - Frequent audiences seek out information.
 - General population reacts to message.
- Age and education level affect audience frequency:
 - Younger patrons (18 - 29) are arts “sampling.”
 - Mature patrons (55+) are your core attendees.

Thank You

- Top-line summary will be available on The New Yorker Compass and LaPlaca Cohen's websites shortly.
- Please contact *The New Yorker* or LaPlaca Cohen for more information about the research findings.