

LaPlaca Cohen and  
Discovery Communications/Antenna Audio  
present

# CULTURE TRACK 2007

LaPlaca Cohen



ANTENNA AUDIO 

## Culture Track Overview

- *Culture Track* is LaPlaca Cohen's fourth installment of national research concerning:
  - Attitudes and behaviors of cultural audiences
  - Trends in attendance at visual and performing arts events
  - Motivators and barriers affecting participation
- Largest on-going study of the cultural market in the United States
- Goal: To better understand the role and perceptions of cultural participation in people's lives right now

## New in 2007

- Four years of data are now available to discern trends in cultural audience attitudes and behaviors
  - This presentation incorporates findings from *Making Culture Count*, the previous version of this study, conducted with *The New Yorker* between 2003 and 2005
- Where year-to-year trends remain steady, we show 2007 data only and investigate aspects of audience behavior
- New areas of inquiry this year focus on use of new media in and outside the cultural venue

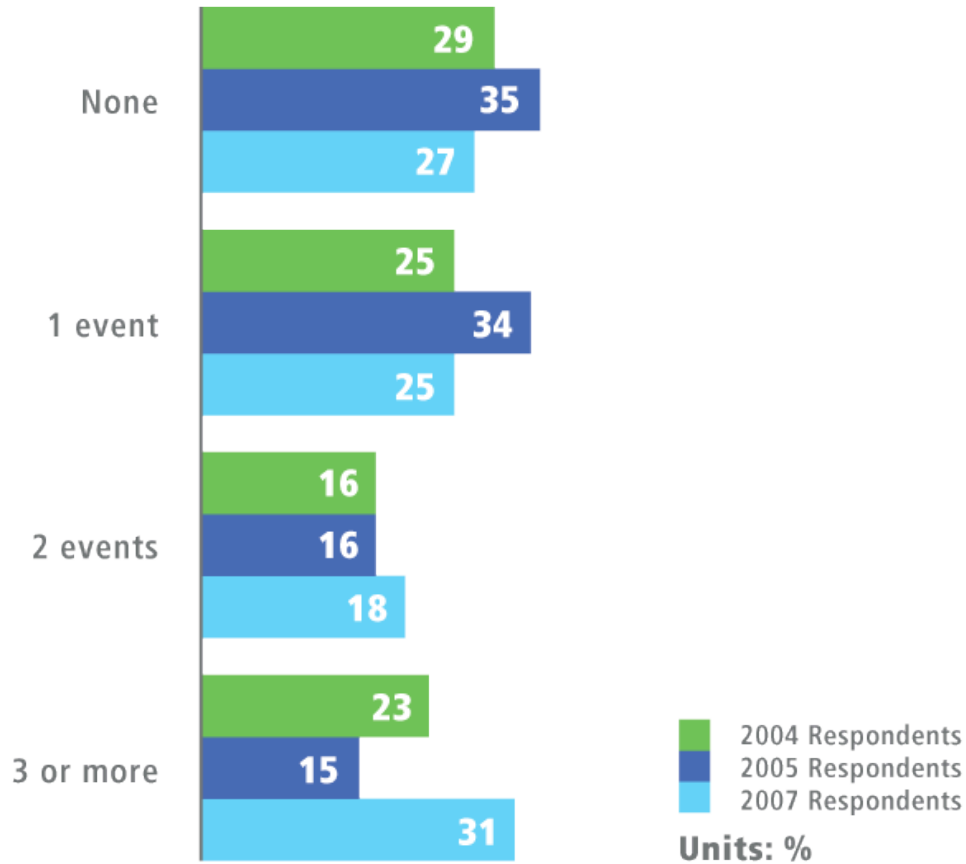
## Methodology

- Survey conducted online by Penn, Schoen & Berland Associates, Washington, DC, on behalf of LaPlaca Cohen and Discovery Communications / Antenna Audio
- As in past years, we inquire about 'cultural activities,' which includes both traditional arts genres and popular art forms, like movies and popular music
- Total sample size: 3,815 total Respondents nation-wide
  - 29% (1,093) Frequent Attendees— arts attendees who attend art galleries, art museums, children's museums, classical dance, classical music, living museums, modern dance, opera, or theater *at least once per month*
  - 71% (2,722) Infrequent Attendees— infrequent arts attendees
- Survey fielded and completed in August 2007
- Margin of error = +/- 1.6%

# Attendance Trends

# Frequency of Attendance

Number of cultural activities attended per month

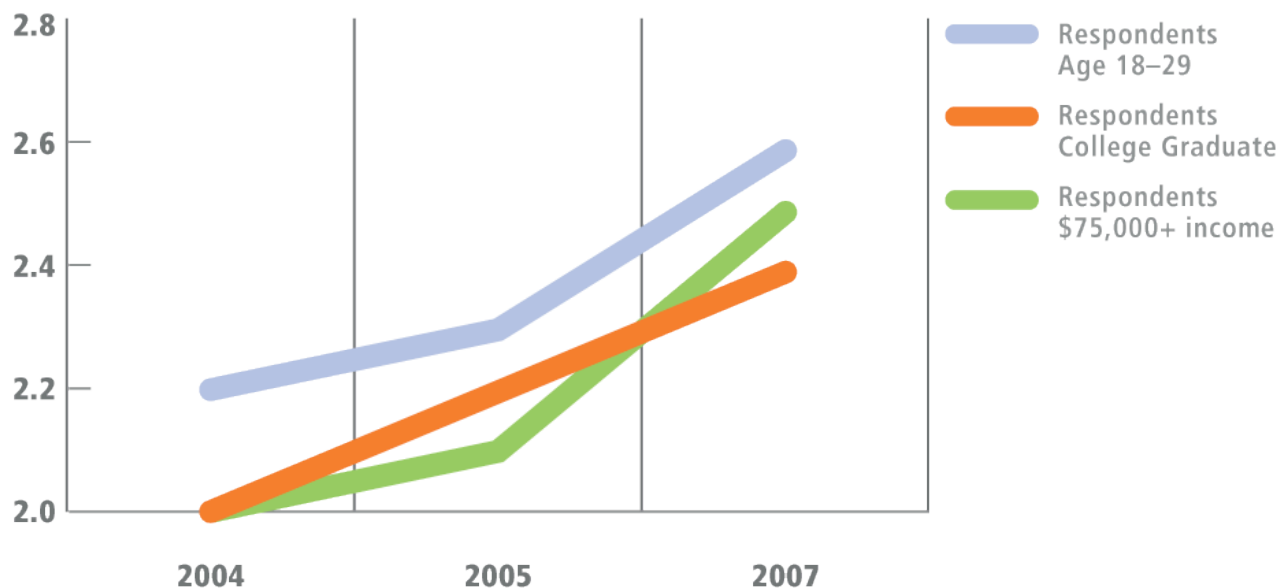


- Overall, 74% of Respondents attend at least one cultural activity each month
- This has remained consistent over the past few years
- While overall attendance is steady, a significant increase is seen in 'heavy participants,' Respondents who attend 3 or more cultural events per month

# Who's Attending More

- On average, Respondents attended 1.9 cultural activities per month in 2007
- Among Respondents, frequency of attendance is correlated with age, education, and income:
  - Younger audiences (ages 18-29) average 2.6 cultural activities per month
  - College graduates average 2.5 cultural activities per month
  - Those with an income over \$75,000 average 2.4 cultural activities per month
  - And, all three of these groups have become more engaged over the years
- Those we define as Frequent Attendees are the most engaged with cultural activities, averaging 3.8 per month

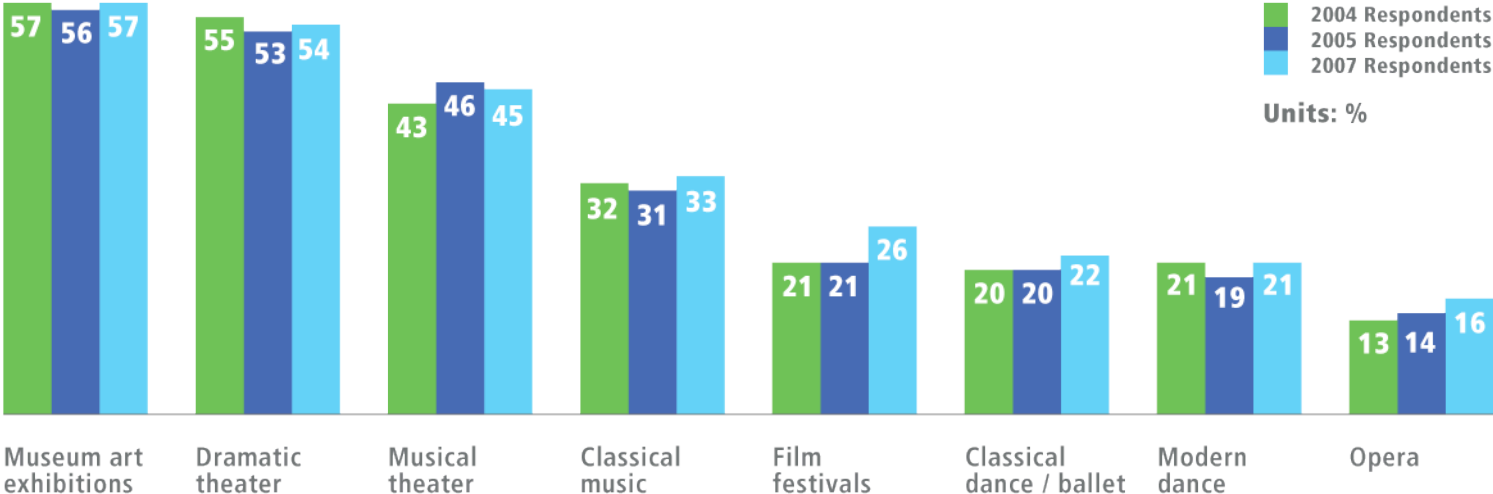
**Average number of cultural events attended per month**



# Steady Participation

- Consistent with previous years' findings, Museums and Theater remain the most popular cultural activities, with the majority of Respondents attending at least once per year
- Among lesser-attended art forms (Opera, Classical Dance), slight increases in overall participation levels can be seen
- New areas polled for the first time this year that show strong participation include:
  - Living museums (76% of Respondents attend)
  - Historic attractions (74% of Respondents attend)
  - National parks (72% of Respondents attend)

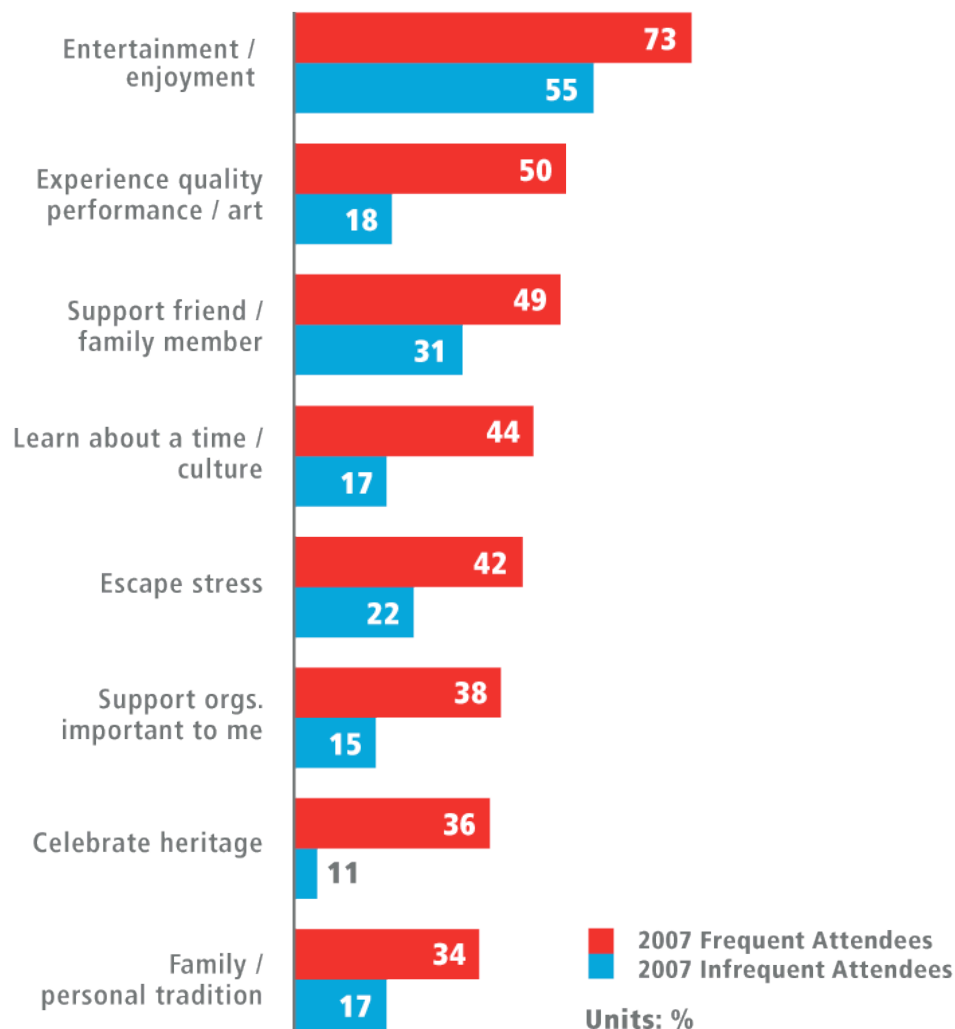
**Cultural activities attended once or more per year**



# Influencers, Motivators & Barriers for Attendance

# The Importance of Entertainment & Enjoyment

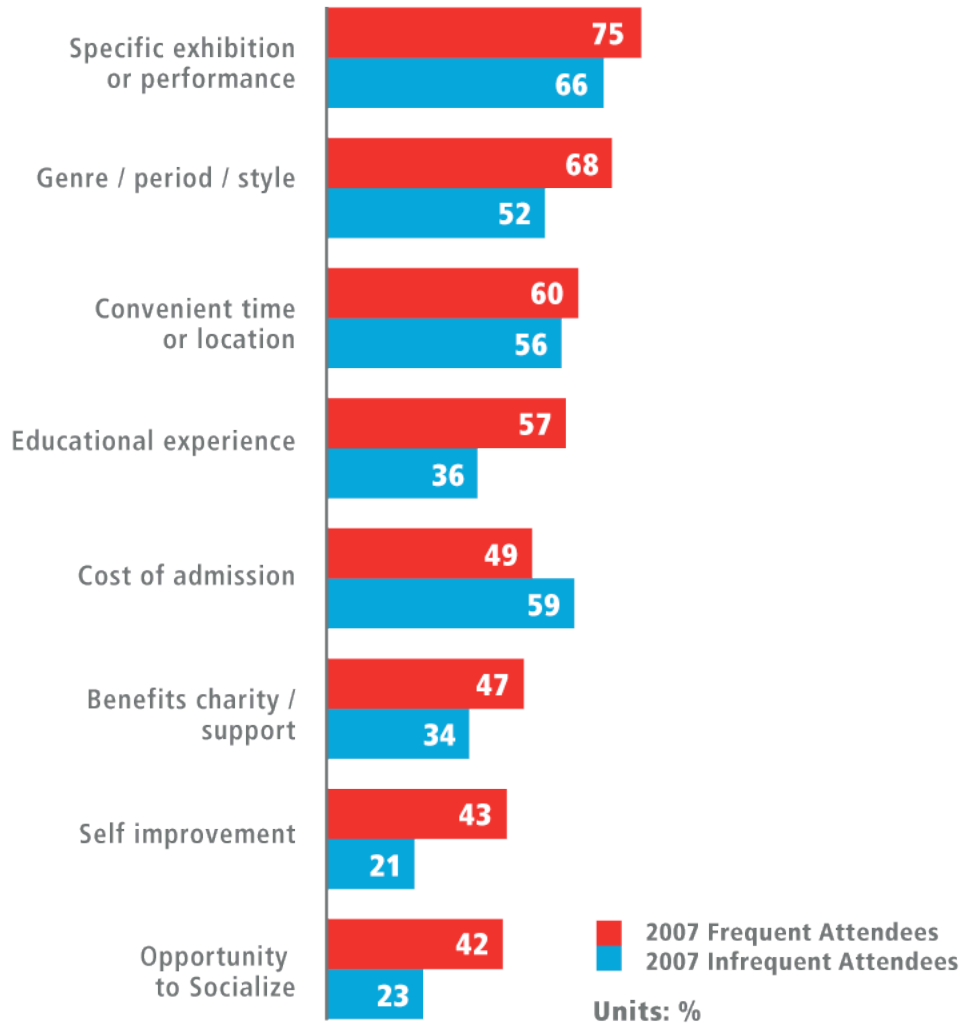
## 'Very Important' in decision to make culture part of life



- As in past years, the majority of Respondents (60% overall) cite Entertainment / Enjoyment as a key reason for making culture a part of their lives
- Escapism and social aspects of cultural activities are more important to Infrequent Attendees:
  - Supporting friends and family members (31%)
  - Escaping stress (22%)
- Educational and intellectual enrichment are also important factors to Frequent Attendees:
  - Experiencing quality art / performance (50%)
  - Learning about another time / culture (44%)

# Content and Convenience

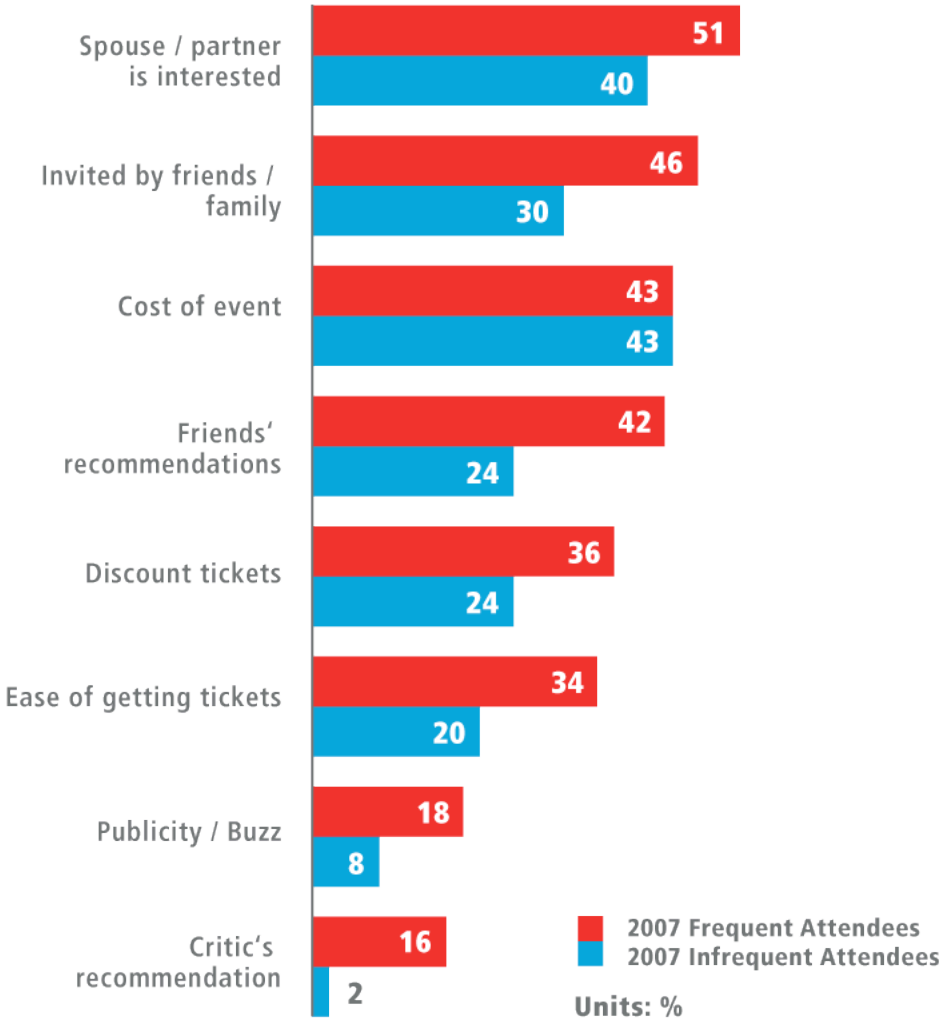
## Motivators to participate in cultural activities



- Consistently, Particular Exhibitions / Performances are the leading motivators to participate in specific cultural activities (68% overall)
- Four out of Respondents' top five motivators are related to content (specific subject or genre) and convenience (time, location, and cost)
- Infrequent Attendees are more price-sensitive than Frequent Attendees
  - Cost of Admission is a bigger motivator for Infrequent Attendees (59%) than for Frequent Attendees (49%)

# Social and Personal Influences Dominate

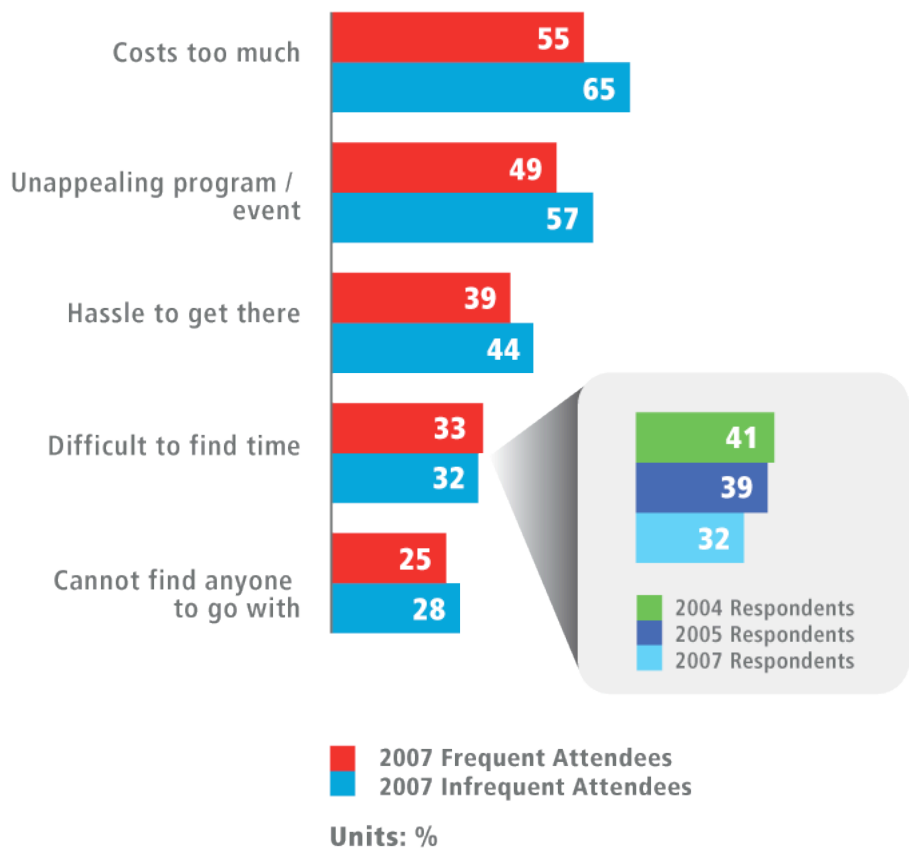
## 'Very influential' in decision to attend a cultural event



- For both Frequent and Infrequent Attendees, three out of the four top influencers reflect the importance of social or personal factors
  - Frequent Attendees value Friends' Recommendations almost three times more than those of Critics
  - Infrequent Attendees value Friends' Recommendations twelve times more than those of Critics
- The Availability of Discounted Tickets, not previously polled, ranked as the 5th strongest influencer among both groups

# Breaking Down Barriers

## Barriers preventing attendance of cultural events

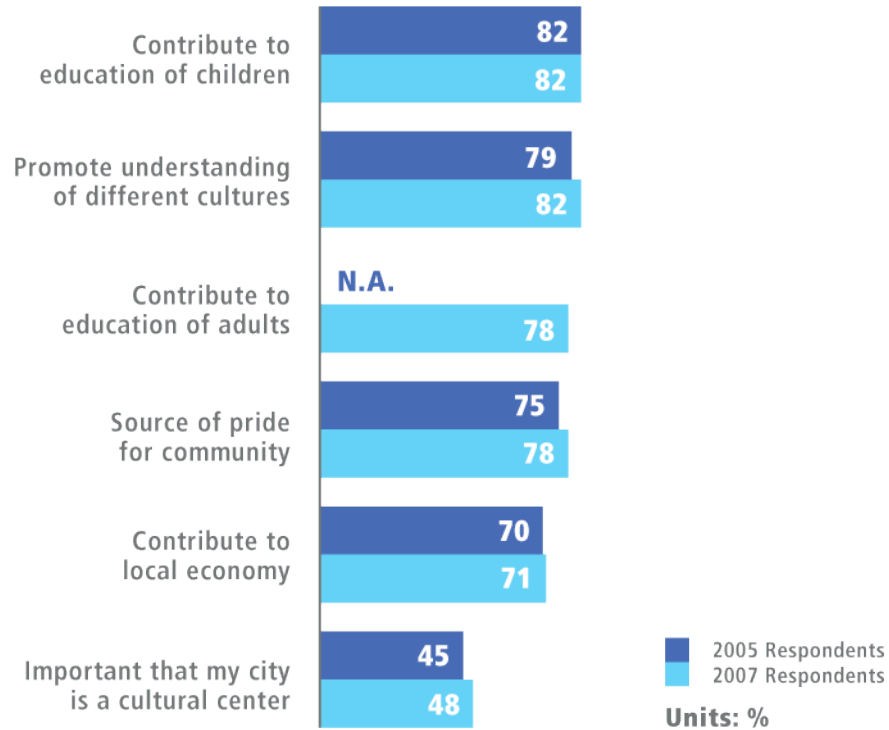


- High Costs continue to be the biggest barrier to attending a cultural event for both Frequent and Infrequent Attendees
- Although Respondents continue to lead busy lives, Difficulty Finding Time is less of a barrier for both groups than in past years
- Unappealing Programming / Events, the only area cited that addresses artistic content, is the second highest barrier to attendance
  - Over half of Infrequent Attendees report that it would prevent them from attending an event

# The Role of Cultural Organizations

# Education is Key

## 'Agree' about benefits of the arts to the community



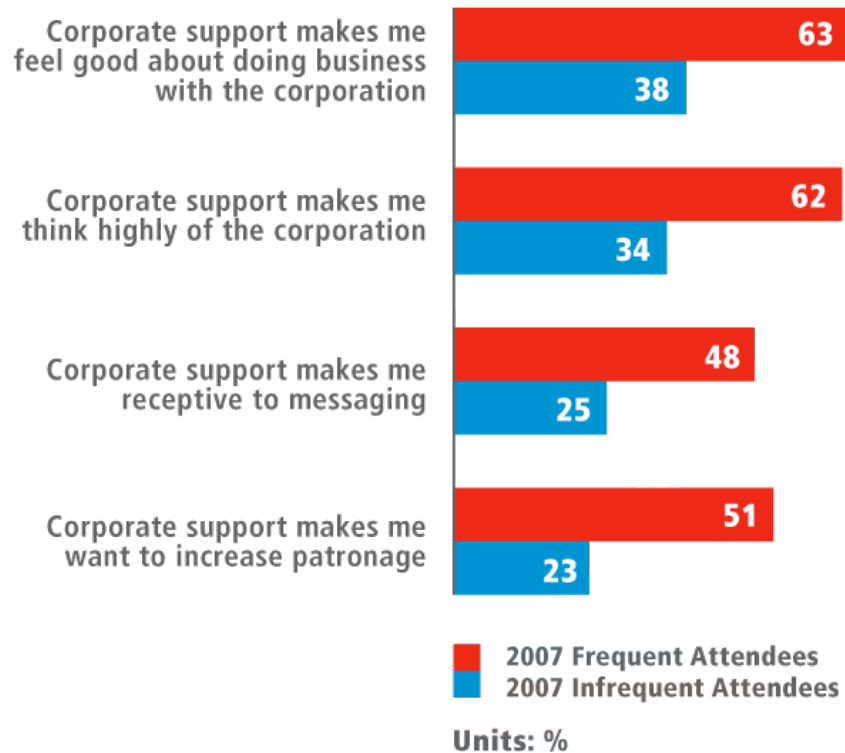
- When asked about the benefits of cultural organizations to the community, most Respondents identified educational benefits
- Cultural organizations are increasingly successful at being perceived as welcoming to kids
  - But still, less than half of all Respondents agree that “Most Arts Organizations are Children Friendly”

## 'Agree' that arts organizations are Children Friendly



# Enthusiasm for Corporate Support

## 'Agree' about corporate support of the arts

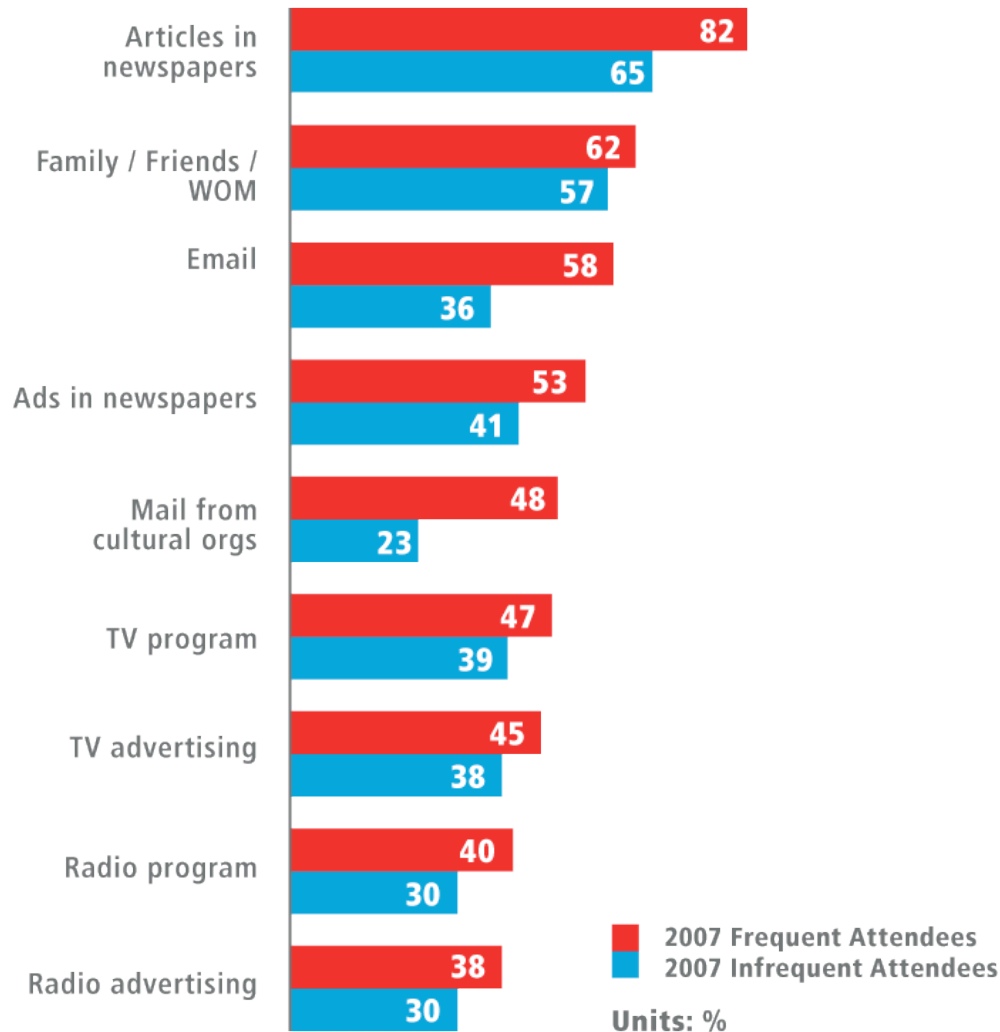


- While overall levels of enthusiasm for Corporate Arts Support are slightly lower than in past years, the majority of Frequent Attendees are influenced by such support
- Those most supportive of corporate involvement are older audiences (ages 65+) and the wealthy (HHI = \$150K+)

# Information Sources

# Tried and True, Plus the New

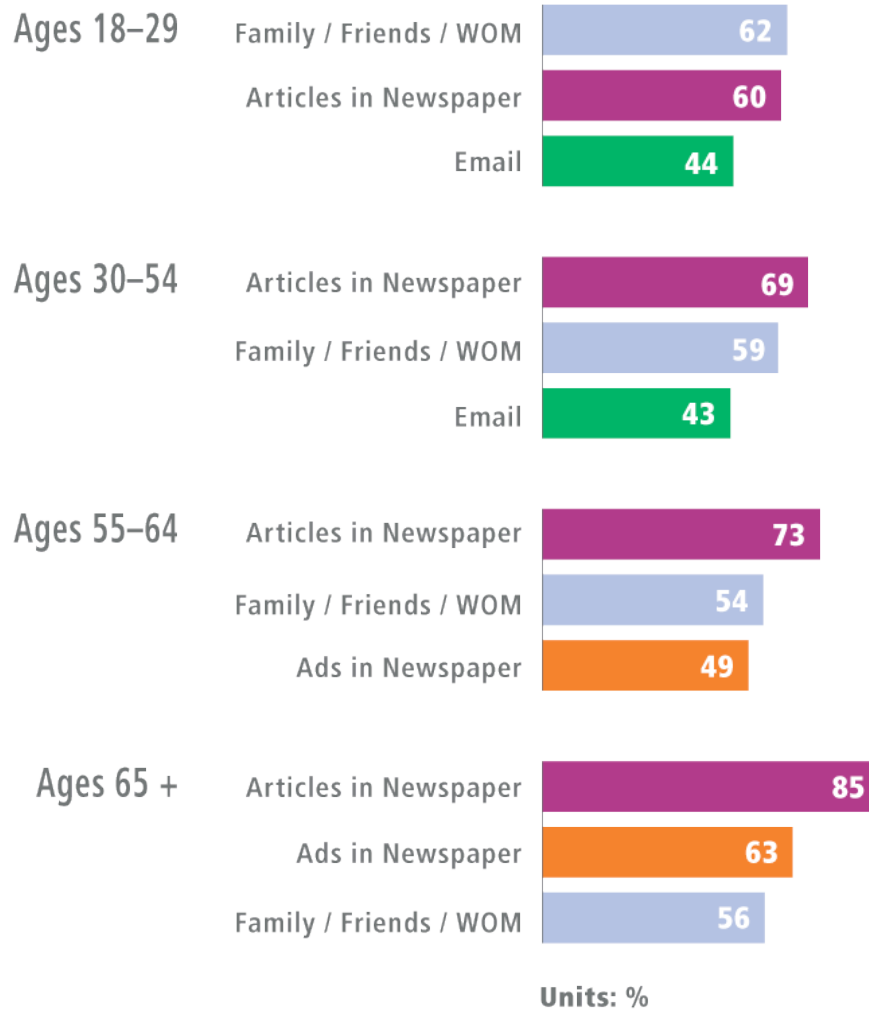
## Sources of Information on cultural events



- Newspaper Articles remain Respondents' most cited source of information about cultural activities, followed by Word of Mouth
  - Newspaper usage (both Articles and Ads) increases with age, income, and education level
- Use of Email as a source of information (including Announcements and Newsletters) has increased significantly
  - Email is used by 42% of Respondents overall, compared to 27% in 2005
  - For the first time, Email is a more cited source of information than Direct Mail

# Use of Top Information Sources is Related to Age

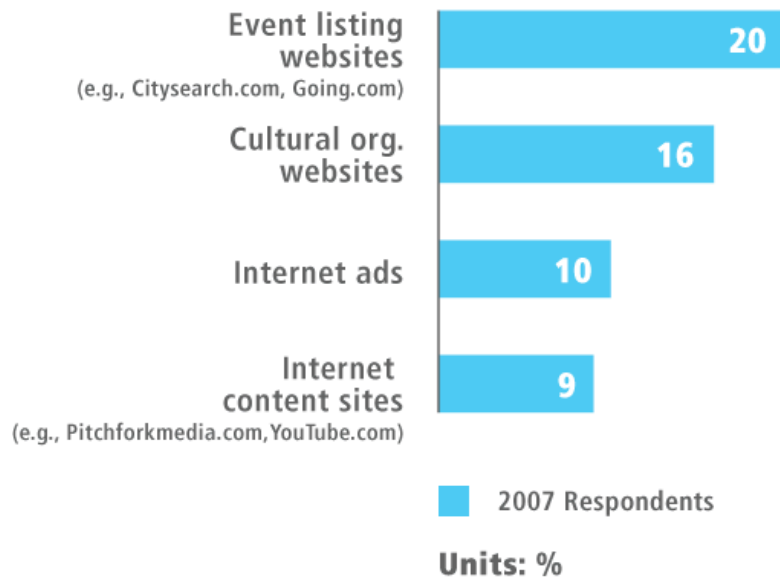
## Frequently used information sources, by age



- The younger the audience, the more networked – both socially (Word of Mouth) and technologically (Email)
- As audiences mature, they tend to rely on more established media outlets (Newspaper Ads and Articles)

# The Importance of Online

## Online sources of information on cultural events

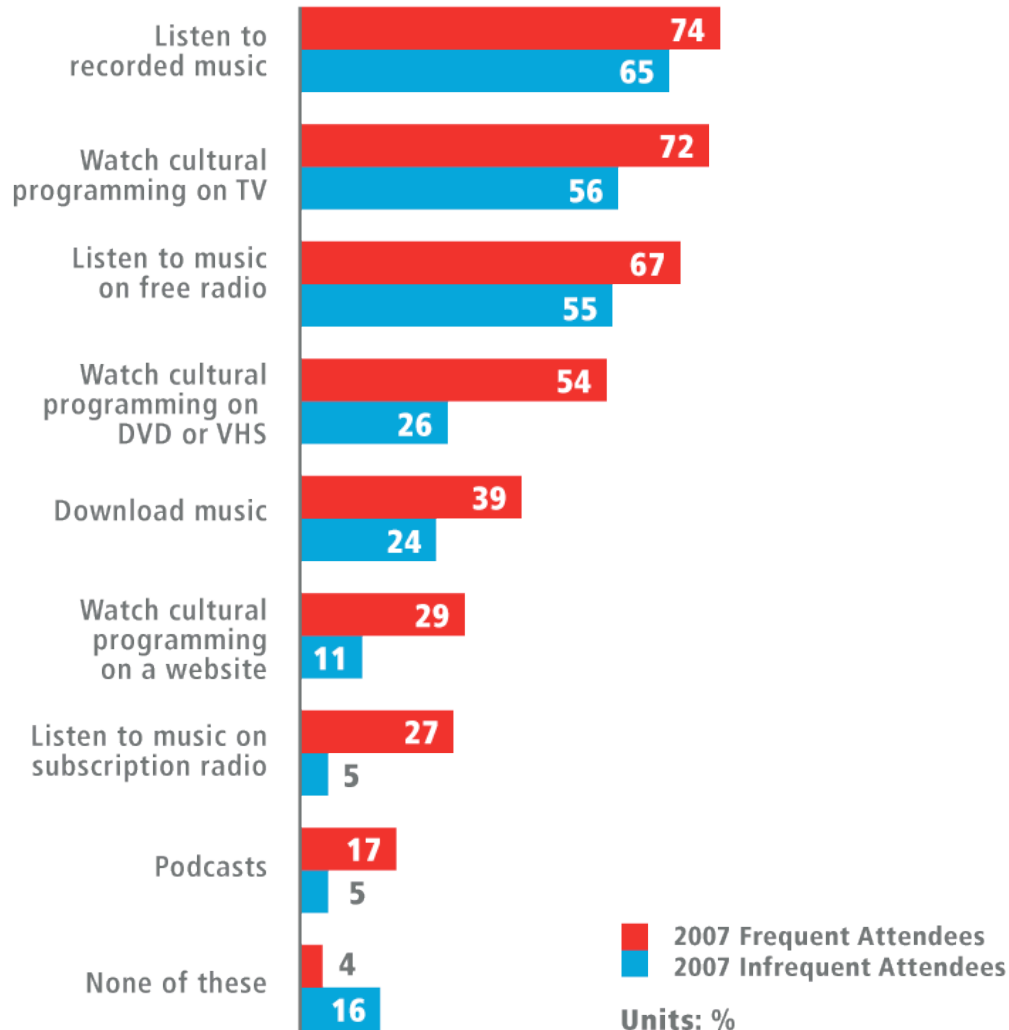


- Online, Respondents rely on many sources for information on cultural activities:
- All of these skew slightly towards younger audiences, those ages 18-29

# Experiencing Culture at Home and Away

# Experiencing Culture at Home

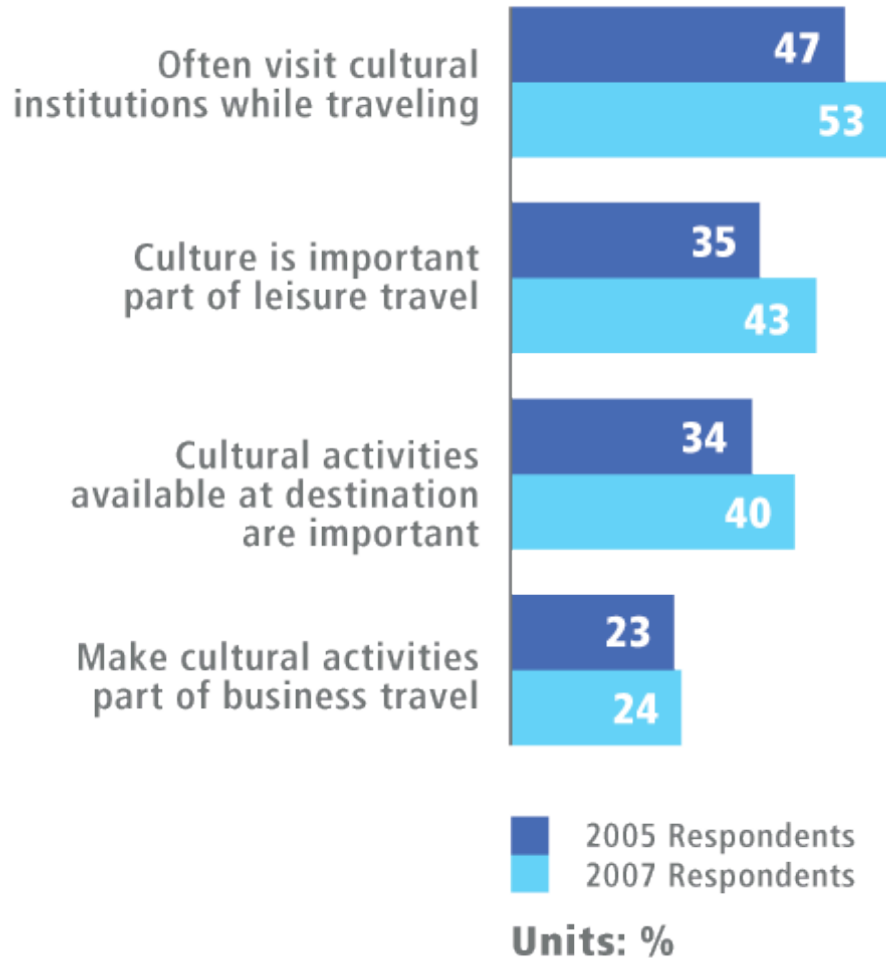
## Other ways of experiencing culture



- Frequent Attendees are more likely to use “at home” media to expand their cultural experiences
- In general, newer media are popular among younger Respondents (ages 18-29):
  - Downloading music (48%)
  - Viewing programming on websites (25%)
  - Podcasts (19%)

# Experiencing Culture Away from Home

## 'Agree' about travel and culture

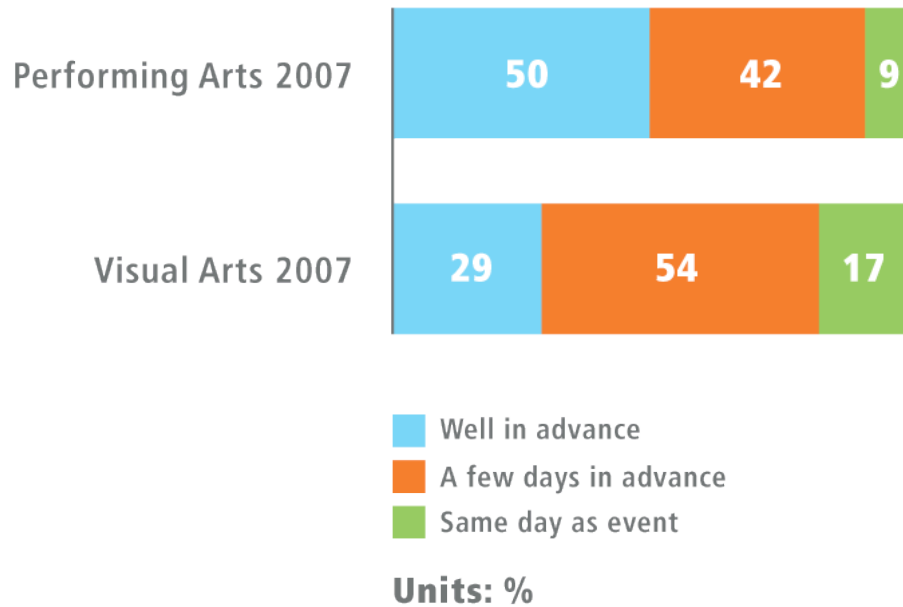


- More than 50% of all Respondents say they 'Often Include' the Visual or Performing Arts in their Travel Plans
- Culture plays an increasingly important role in Leisure Travel, as does the Availability of Cultural Activities at Destination

# A Closer Look: Performing Arts & Visual Arts

# Planning Ahead

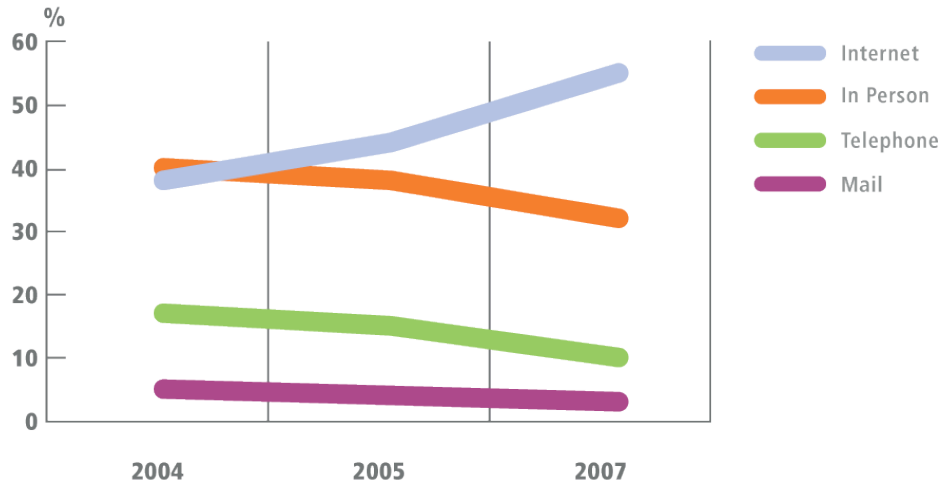
## Time frame of decision to attend



- Performing Arts audiences continue to plan further in advance:
  - 92% of Respondents decide to attend Performing Arts events in advance
  - Only 9% decide to attend a Performing Arts event the same day
- Visual Arts audiences are more spontaneous:
  - 54% of Respondents decide to attend a museum or visit an exhibition a few days in advance
  - 17% decide to attend on the same day
- Notably, the percentage of Respondents who say they decide to attend a museum or visit an exhibition well in advance is increasing

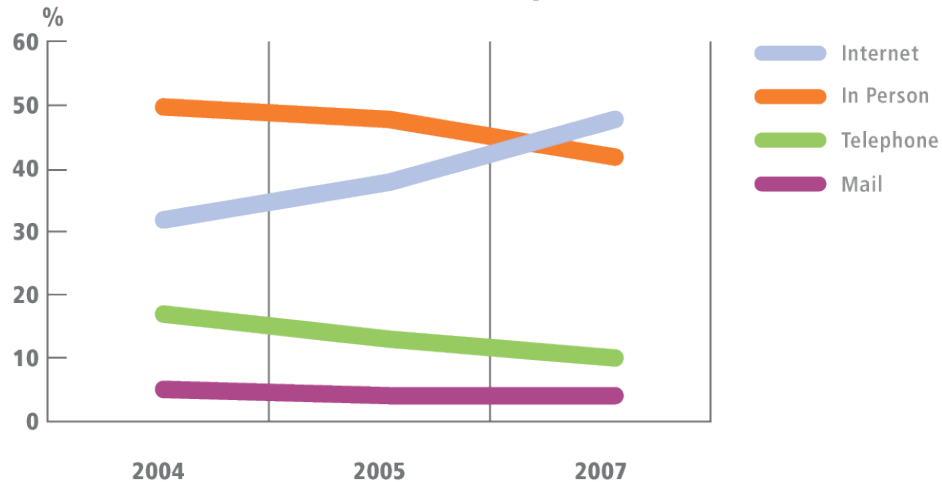
# Online is Clicking

## Performing arts method of ticket purchase



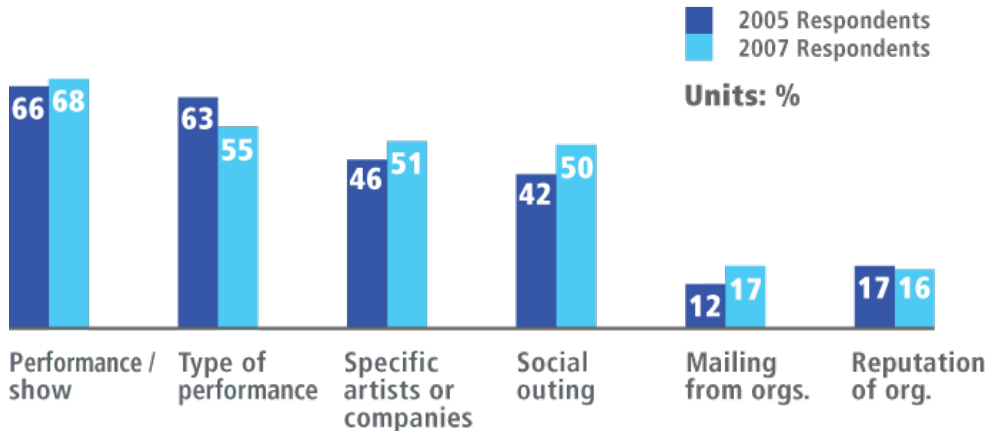
- For the first time, the Internet is Respondents' most commonly used method to purchase tickets for both the visual and performing arts
  - The Internet is now the preferred purchase method for all ages, even among those 65+
  - This preference has steadily increased while all other methods have decreased

## Visual arts method of ticket purchase

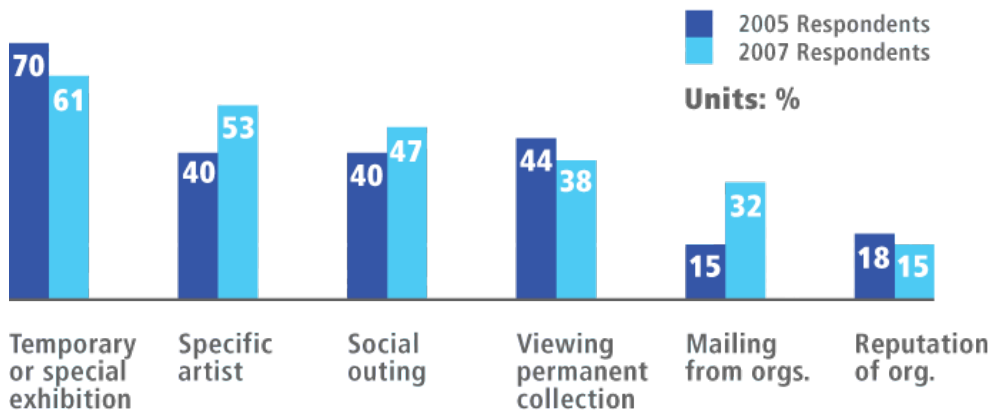


# Influenced by Specific Content

## Performing arts influencers



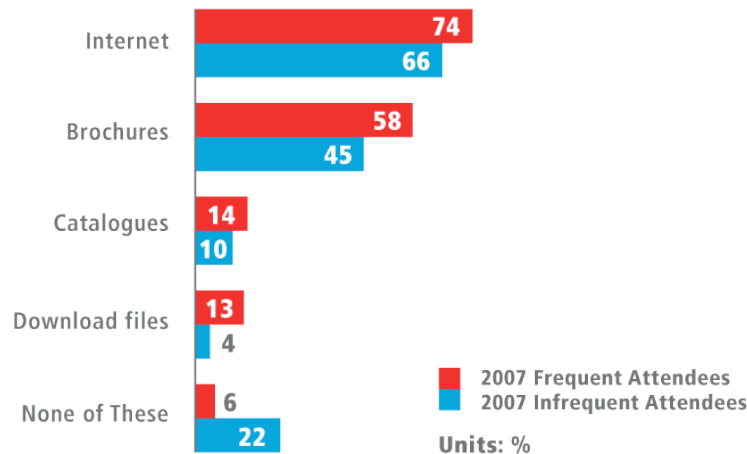
## Visual arts influencers



- Increasingly, audiences are looking at specific content in their decision making
- In both the performing and visual arts, Respondents' interest in Performances / Exhibitions continues to drive participation
  - In the visual arts, Temporary or Special Exhibitions (61%) are significantly more influential than Viewing the Permanent Collection (38%)
- Desire to see Particular Artists / Companies has gained influence in both performing and visual arts

# Planning Ahead for Visual Arts Visits

## Information used to prepare for a visit



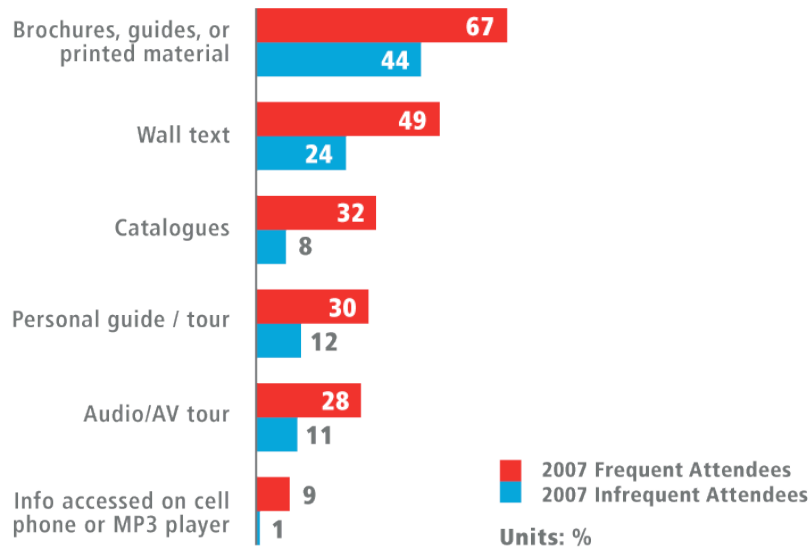
- The majority of Respondents use information to prepare for their visit to Visual Arts organizations in advance

- 94% of Frequent Attendees and 78% of Infrequent Attendees do so

- 67% of Frequent Attendees say they use printed materials when visiting Visual Arts organizations, such as brochures and guides

- Frequent Attendees are more than twice as likely than Infrequent Attendees to use an audio or audio-visual tour device

## Information used during a visit



# Implications

# Key Implications

All audiences emphasize the importance of **entertainment** and **enjoyment**

*means* "I mainly participate in cultural activities because I want to, not because it's 'good for me'"

**Content** is the motivating factor in choosing cultural activities and audiences are becoming increasingly specific

*means* "More and more I'm learning what I like, what I don't, and I value personalized experiences"

**Social factors** are more influential in decision making than logistics or promotions

*means* "What my friends and family say and do is more important to me than things I hear from critics or organizations"

**Cost** and **time** are still big barriers

*means* "If I value an activity, I'll spend more and make more time for it"

Increasingly, the **Internet** plays a dominant role in how audiences interact with culture

*means* "I use the Internet to experience culture before and after a visit by using it to plan my trip, to purchase tickets, and to enjoy and learn about the arts at home"

# What They Say vs. What They Mean

"It's too expensive"	<b><i>means</i></b>	"I don't see the value"
"I don't have the time"	<b><i>means</i></b>	"I can't commit to doing it all"
"It's boring"	<b><i>means</i></b>	"It makes me feel stupid"
"My kids don't like art"	<b><i>means</i></b>	"If it does not engage my kids, they suffer, and then I suffer!"
"I just don't think about it"	<b><i>means</i></b>	"It's not relevant to my life"
"It's difficult to find parking"	<b><i>means</i></b>	"I don't need one more complication in my life"

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