



CULTURE TRACK



LaPlaca
Cohen



An initiative of

**LaPlaca
Cohen**

Research in partnership with

Kelton

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Get in touch to start a conversation at
info@CultureTrack.com

Culture Track is a cultural innovation engine, dedicated to addressing the most pressing challenges facing the worlds of culture and creativity through research, education, dialogue, and action.

We believe that studying and tracking the shifting patterns of audience behavior is critical to shaping the future of culture.

1

About Culture Track

What is Culture Track?

Culture Track began in 2001 as a national research study of the changing behaviors of cultural audiences, developed pro-bono for the field by LaPlaca Cohen, a collaborative team of strategists, researchers, designers, and planners who develop marketing, strategy and design solutions for the cultural world.

Today, Culture Track has evolved to include a variety of different components (including online content at CultureTrack.com, talks and panels, and more), but our research study—which has been fielded seven times since 2001—is still at the heart of everything we do.

How is Culture Track fielded?

LaPlaca Cohen worked in partnership with the research firm Kelton Global to field *Culture Track '17*. The study was fielded nationwide with a total of 4,035 respondents using an online survey. Respondents were 18 years or older and U.S. citizens, and they mirrored the demographic make-up prescribed by the U.S. census.

What's new in 2017?

The world has changed drastically since we developed Culture Track in 2001, and even since we fielded our last iteration of the study in 2014—when only 66% of audiences had smartphones! Significant shifts in the social, political, digital, and media landscapes have fundamentally changed the way that audiences are defining and consuming culture, so this was an opportune moment to take a fresh look at the way Culture Track is fielded, and ensure that in 2017, the data gathered would be as actionable and relevant as possible.

With this in mind, we developed a revamped study—inspired by our previous ones, but updated to address the issues that are most top-of-mind for the cultural field

today. However, we still wanted to provide the year-over-year tracking data that makes Culture Track distinct.

So, in this transitional year, we fielded two questionnaires:

1. An abridged version of the *Culture Track '14* questionnaire.

Maintaining a portion of our previous questionnaire allowed us to compare 2017 data to past years across a handful of key questions. Respondents were screened for participation in at least one cultural activity in the past year, defined as: museum/art exhibition, dramatic theater, musical theater, classical music, film festival, classical dance/ballet, modern dance, opera, zoo, botanical garden, aquarium, science museum, history museum. The sample size of this data set was n=1,022, and the margin of error was +/- 3.1%.

Activities as culture

- | | |
|--|---|
| 1 Art or design museum | 21 Popular music (e.g., rock, country, hip-hop) |
| 2 Children's museum | 22 Classical music |
| 3 Art gallery/fair | 23 Jazz music |
| 4 Botanical garden | 24 Opera |
| 5 Zoo or aquarium | 25 World music (e.g., Latin, Caribbean) |
| 6 Science or technology museum | 26 Contemporary dance (e.g., jazz, hip-hop, modern) |
| 7 Natural history museum | 27 Ballet |
| 8 Public park | 28 Regional dance (e.g., salsa, Irish stepdance, Indian classical) |
| 9 Architectural tour | 29 Historic attraction/museum (e.g., historic home, landmark, history museum, religious site) |
| 10 Public/street art | 30 Television program (e.g., streaming or broadcast, non-news) |
| 11 Film festival | 31 Movies/film (e.g., documentary, independent, blockbuster) |
| 12 Music festival | 32 Library |
| 13 Performing arts festival (e.g., dance, theater, etc.) | 33 Cultural center |
| 14 Community festival/street fair | |
| 15 Craft or design fair | |
| 16 Books/literature | |
| 17 Food and drink experience (e.g., food festival, beer or wine tasting) | |
| 18 Play (non-musical) | |
| 19 Musical | |
| 20 Variety or comedy show | |

2. An all-new 2017 questionnaire.

The most significant change to this questionnaire was the screener: instead of only accepting those who had participated in the fourteen activities listed above in the 2014 questionnaire, respondents were required to have participated in at least one activity per year that they define as culture. *Culture Track '14* uncovered that audiences were defining a much broader range of activities as culture—ranging from parks, to TV, to food and drink experiences—so we wanted to reflect this expanded landscape. Therefore, the screener for the 2017 questionnaire, included a list of 33 activities (see list at left) that audiences could select from, resulting in a pool of respondents that are more diverse, both demographically and in the way they conceptualize “culture.”

This new questionnaire also includes a variety of updated questions that explore topics such as diversity, digital, and measuring the impact of culture on our world.

The sample size of this data set was $n=3,013$, and the margin of error was $\pm 1.8\%$. This questionnaire is designed to set the new baseline for Culture Track, so that it can be used for all tracking moving forward.

How are we "slicing and dicing" the data?

Throughout the report that follows, we break out the data in different ways, such as by generation, race/ethnicity, ability, and geographic location. Without the benefit of an even larger data sample to analyze, however, it is not possible to provide any greater level of granularity on these breakouts, so please bear in mind that the exploration here is general and meant to serve as a baseline. Ideally, future deep-dive studies could augment the insights uncovered by *Culture Track '17* to provide deeper understanding into specific sub-groups.

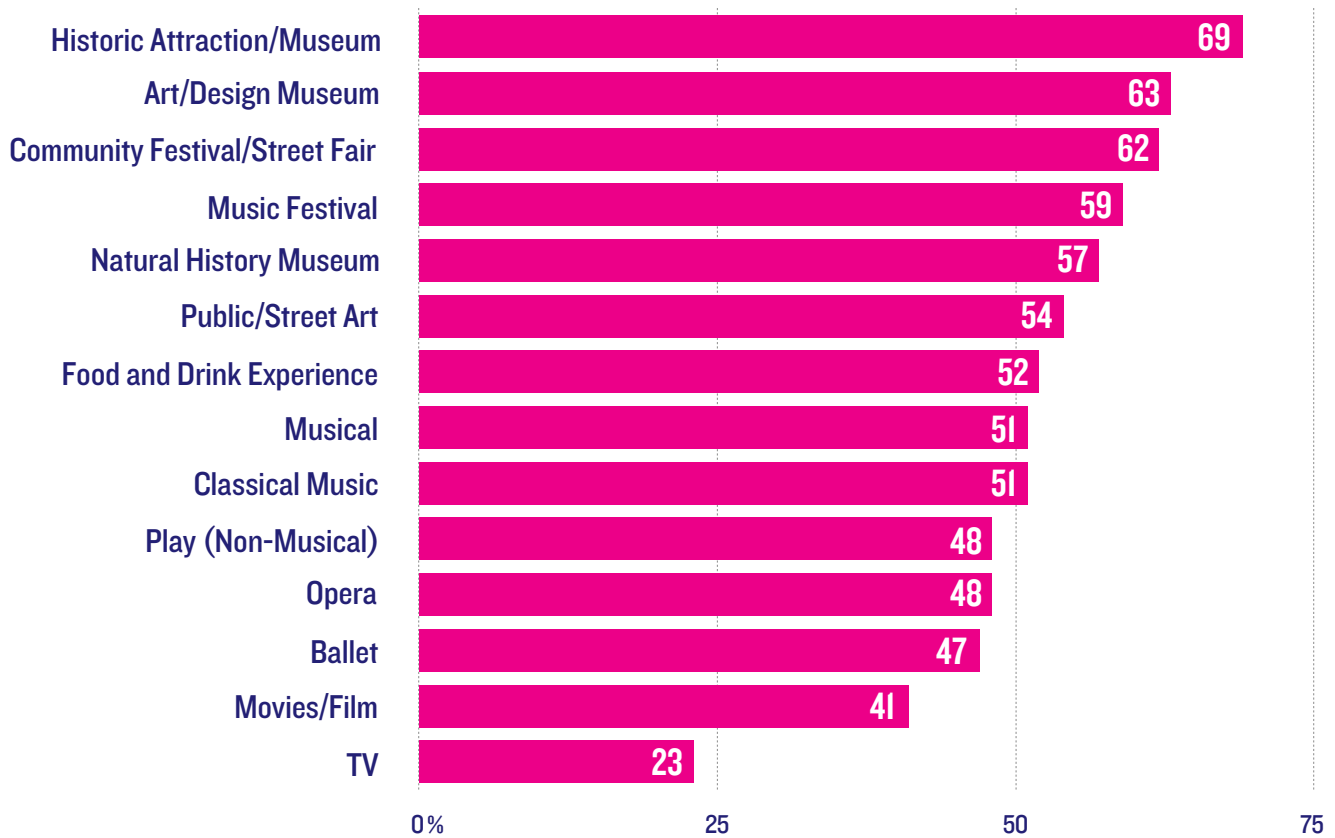
NOTE: When we break out the data by generations, age ranges are defined as Millennials (20–35), Gen-X (36–52), Baby Boomers, (53–71), and Pre-Wars (72+). For the purposes of this high-level report, "people of color" are defined as those who do not fall into the category of non-Hispanic Caucasians. More specific information on those with a particular race/ethnic background, however, can be found in the full data set, available for download at CultureTrack.com.

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Introduction: A Paradigm Shift

Although we have charted the ever-changing patterns of cultural audiences since 2001, prior to 2014 we never explored how those patterns could inform which activities audiences even defined as culture. But just like the world around us had transformed—with new modes of communication and connection, endless options for leisure time, and transformed patterns of giving—in 2014 we discovered that the cultural landscape had fundamentally transformed as well. The narrow niche of culture had expanded to include public parks alongside art museums, food and drink experiences alongside dramatic theater, and street art alongside classical dance.

Activities Defined as "Culture"



So, over the past three years we followed the audience and in 2017 evolved Culture Track to encompass all of the activities they had defined as cultural. What happened next we could have never expected. For today's audiences, the definition of culture has democratized even further, possibly to the point of extinction. Activities that have traditionally been considered culture

and those that haven't are now on a level playing field, with audiences torn about whether the label "culture" is even applicable. For instance, more than a third of art museumgoers did not think art museums were a cultural experience, and over half of theatergoers felt the same. In fact, audiences were more likely to consider a street fair or food and drink experience culture than an opera or ballet.

This presents a complete paradigm shift. Audiences in 2017 do not place priority or meaning in whether an activity is "culture" or not: it can be anything from Caravaggio to Coachella, Tannhäuser to taco trucks. But if "culture" is no longer on a pedestal, then does it no longer have a purpose? We don't think so. We just need to articulate what gives the term meaning in this radically changed landscape.

Fortunately, the very audiences that are breaking down the current definition of culture are also helping to rebuild a new one. In their own words, they have defined the purpose of cultural activities in the world as the following:

Transforming Perspectives

“...Having it change the way you think or challenge 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 adding variety and color to it. It needs to bring understanding and acceptance.”

Audiences believe that culture is a positive force. But in this complex moment when the value of culture for its own sake is not a given, it is up to cultural organizations to powerfully articulate and deliver on their essential purpose and impact—an effort that we hope this study will help support.

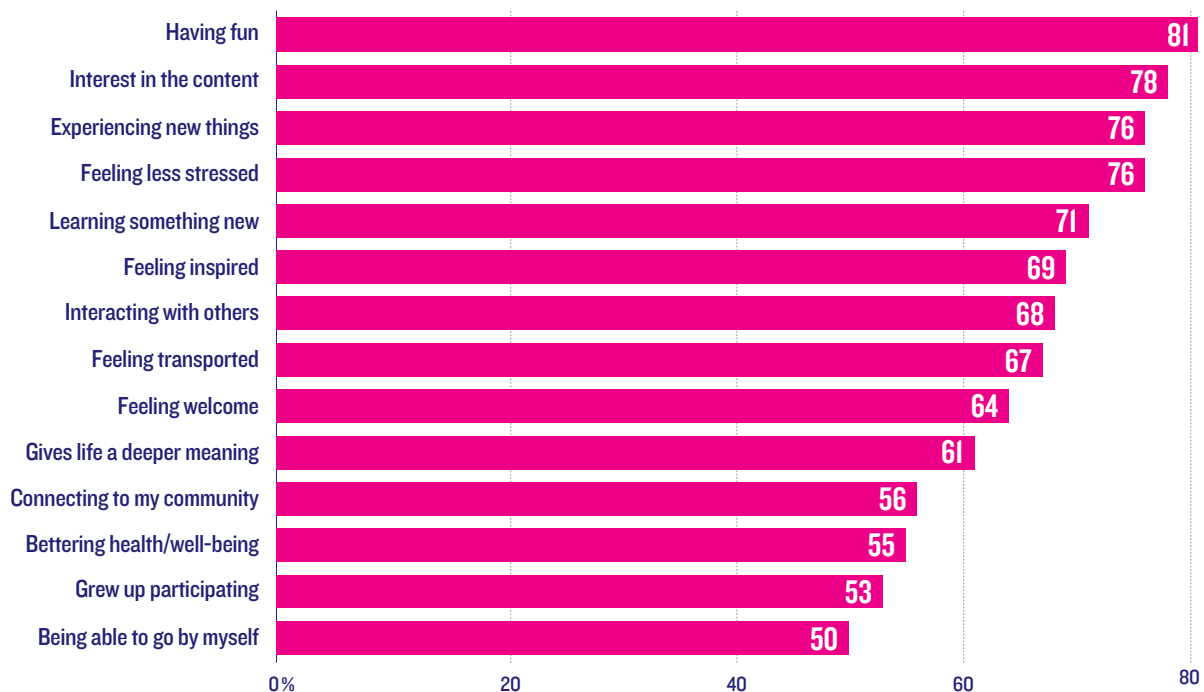
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The New Cultural Consumer

In order to understand this paradigm shift, we have to get inside the hearts and minds of the people who control it: cultural audiences. What is the profile of this new cultural consumer? Why it is that they engage with culture in the first place? And what causes them to stay away?

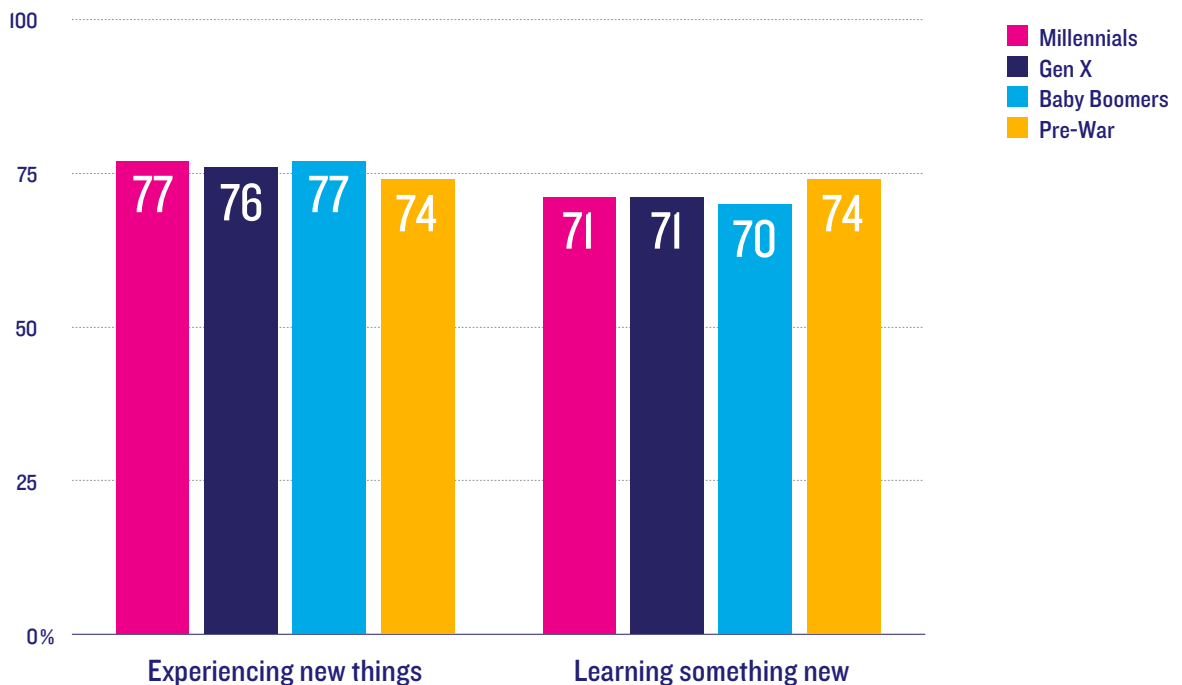
Audiences are driven to attend cultural activities for a variety of different reasons. The single greatest motivator, however, is unanimous: having fun. Cultural organizations may scoff at the word “fun” because it seems to distract from their missions, but audiences believe they are not mutually exclusive. “Fun,” in fact, is a somewhat all-encompassing term that has to be better defined and understood in respect to cultural experiences; but it is an essential—and widely desired—element of them. However, the desire for “fun” or entertainment is not the end-all be-all; audiences have a variety of other important reasons for putting cultural activities on the top of their list.

Motivators for Cultural Participation



For example, all things “new” seem to be critical drivers for audiences, who seek out culture as a critical element of their personal development. This means having a different experience, or learning something they did not know. This desire is consistent across generations, whether they are an 18-year-old with much still to learn about the world, or an 80-year-old with a number of experiences under their belt.

Motivators for Cultural Participation (by Generation)



One of the most surprising findings in our study is that audiences of all ages are choosing culture as a major form of stress release. In a world of constant overstimulation and decreasing boundaries between one’s work and personal lives, culture serves as a crucial antidote. Addressing audiences’ increasing stress levels doesn’t mean the same for every organization: it can mean welcoming and attentive hospitality, comfortable places to sit or gather, or content that is easily accessible.

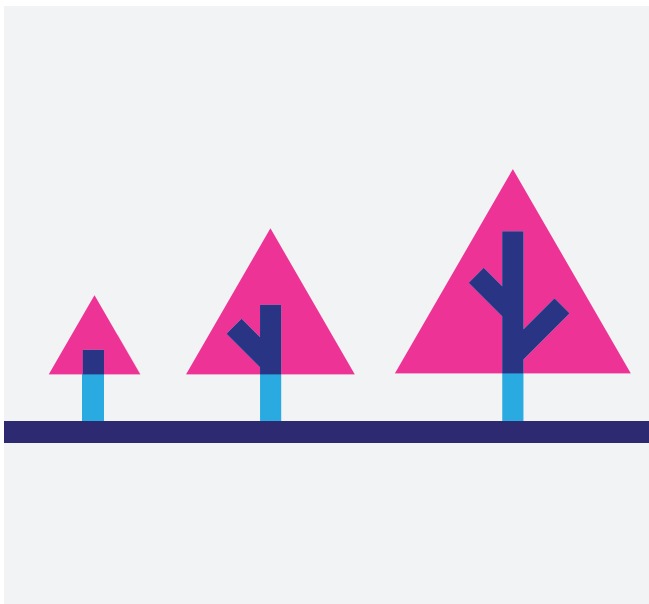
On the flip side, it is important to consider why culture can drive audiences away. Irrelevance is often the culprit: the primary barrier to participation is feeling that a cultural activity is “not for someone like me,” followed by lack of awareness (“I didn’t think of it”). These rank even higher than basic barriers such as inconvenience, not being able to find anyone to go with, and cost.

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**

This data illustrates the stark reality that the greatest barrier to cultural participation is a lack of relevance, well above many of the logistical concerns that cultural organizations often focus on. Fixing this perception and addressing the underlying reasons why it exists are the most important challenges for organizations moving forward.

Spotlight Stats

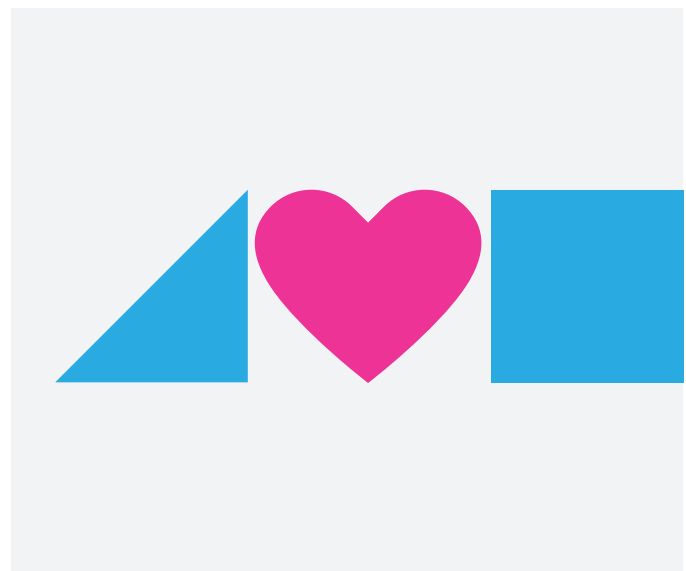


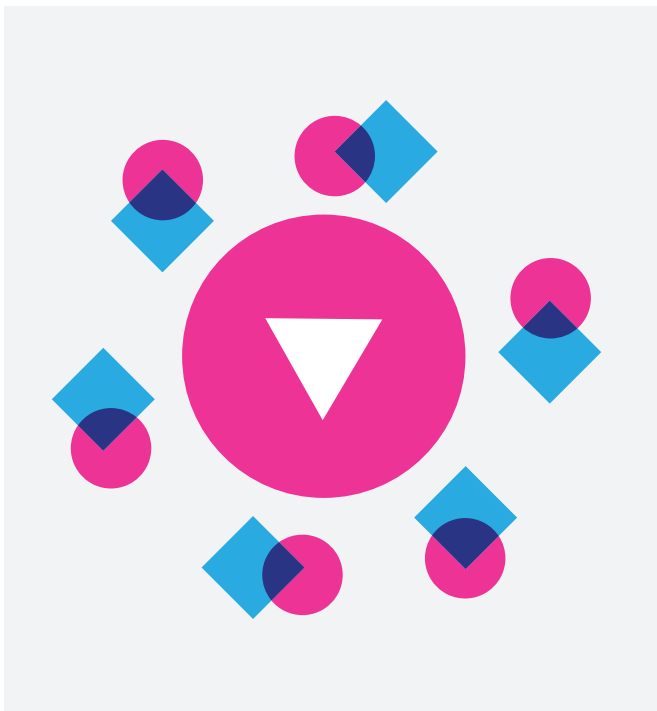
Education is paramount.

Organizations have long believed in the importance of education in developing a life-long relationship with culture, and the data holds out. Frequent attendees are 39% more likely to say that they are motivated to engage in cultural events because they grew up participating in the activity—and this percentage increases for those activities that many participate in during school, such as musicals (54% more likely), ballet (66% more likely), and plays (112% more likely).

Accessibility fails without empathy.

Many arts organizations are implementing accessibility programs to attract audiences with differing levels of ability, but are they working? People with disabilities are 59% more likely than those without to say they do not attend cultural activities because they “had a negative experience last time.”





Diversity means representation.

People of color (those who self-identify as being a race other than Caucasian, or self-identify as Hispanic) are 82% more likely than non-Hispanic Caucasians to say that a reason for not participating in cultural activities in the past year is that these activities don't "reflect people of all backgrounds." This need for representation goes for media consumption as well: people of color are over 30% more likely to get cultural information from personal blogs or podcasts, sources which are often geared more toward specific demographics in ways that national publications or daily newspapers aren't.

It's a whole new media landscape.

While editorial mentions in print still influence cultural participation the most, organizations' posts on social media are rising to the top. And when it comes to advertising, social media has taken the coveted #1 spot, surpassing advertisements in newspapers and magazines. This makes sense, considering that 75% of cultural audiences—of all ages—use Facebook at least once a week. Social media, therefore, is an absolutely essential component of any marketing or outreach strategy.

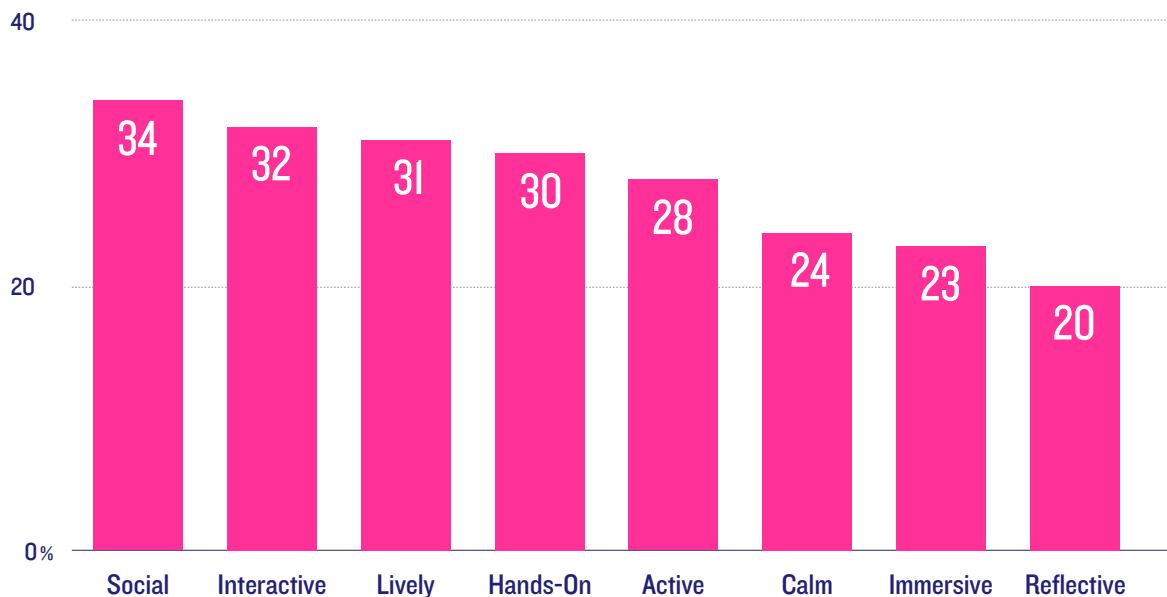


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The Omnivorous Experience

The first step is getting audiences in the door, but what do they want once they arrive? To answer this, organizations have long tried to classify audiences into an “experiential typology,” grouping audiences by the types of experiences they want to have. Focusing on desired experience, rather than by classifications of age or zip code, can be a powerful tool. However, in a world that today floods us with more and more options for spending our precious leisure time, audiences have never been more empowered to choose and customize the types of experiences they want, and can change their minds at any given moment.

Characteristics of an Ideal Cultural Activity



There is no one ideal cultural experience. Cultural audiences—like everyone—are multidimensional, and they have different needs and wants at different times, or even simultaneously. In fact, 15% of cultural consumers who chose “calm” as one of their top-three descriptors of an ideal cultural activity also chose “active,” while 24% of those who chose “reflective” also chose “social.” People who prefer their cultural activities to be interactive

are just as likely to want the experience to be calm as opposed to intense, reflective as opposed to active, and social as opposed to immersive.

Characteristics of an Ideal Cultural Activity (Overlaps)



Calm

Of those who choose “calm,”
15% also chose “active.”



Reflective

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

Cultural organizations can react to these desires in one of two ways. They can create an experiential portfolio, making activities multi-tonal, multi-sensory, and multi-faceted. By providing different avenues for engagement, and encouraging patrons to design and define their own journeys, organizations can meet their audiences where they are at any given time—and provide them with something different the next time they arrive.

Alternatively, organizations can instead focus on providing a specific, singular experience for their visitors, and doing that extraordinarily well and in ways that are distinct to them. Those that go in this direction don't need to think in narrow terms about the audiences they can attract; the ever-



Portfolio Approach

The portfolio approach is perhaps best illustrated by Fábrica de Arte Cubano, in Havana, Cuba, a multi-hyphenate cultural space that offers visitors a changing selection of experiences each visit.



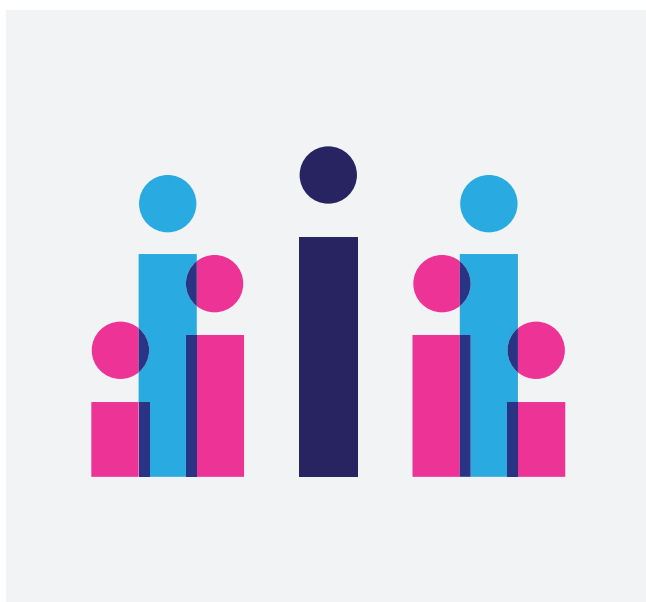
Singular Focus

The Rothko Chapel, in Houston, Texas, exemplifies the singular approach by offering a sole, focused experience to all visitors, every time.

changing needs of every individual mean that there is a whole community of people who will want this singular experience at some point.

In 2011 and 2014, we found that audiences were becoming cultural omnivores: instead of focusing their attention on one type of cultural activity, they were starting to sample. What we are seeing in 2017 is that audiences are really *experience omnivores*, with a hunger and expectation for experiences that suit their every need and mood.

Spotlight Stats



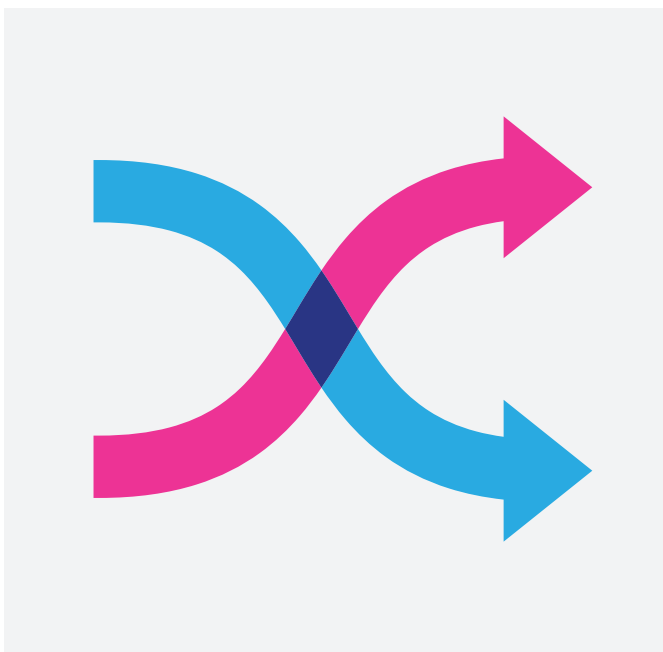
To go it alone or not: audiences want both.

We too often classify people as introverts and extroverts: some of us like being alone, and some of us need to be with other people. However, cultural audiences are not so easily grouped as one or the other. An average of 78% of those motivated to attend a specific activity because they're able to go alone are also motivated to attend by the opportunity to interact with friends and family. Sometimes we all want our cultural alone time, and sometimes we want to share cultural experiences with others.

Culture connects us to reality and lets us escape it.

Some culture-makers feel that culture should force audiences to confront the issues facing their communities, as opposed to helping them escape. However, cultural audiences don't make the same distinctions. For activities like dance, theater, classical music, and museum-going, over 80% of people motivated to attend to connect to their community are also motivated by the chance to feel transported to another place. Audiences don't want to either engage with issues or escape them: they want both.





Cultural diehards always want something new and different.

Multi-tonal experiences are a perfect match for the most frequent cultural attendees, who constantly seek out what is new and exciting to add to their packed agenda. People who attend three or more cultural experiences per month are 94% more likely to cite “it doesn’t change” as a barrier to more frequent cultural participation compared those who attend one or fewer cultural experiences per month.

5

The Digital Dilemma

In any exploration of how our world is changing, it is essential to address the drastic changes in digital technology (and the media landscape that accompanies it)—and how they have fundamentally altered how we engage in every facet of life, including culture. Yet many cultural organizations continue to grapple with how exactly to integrate technology in authentic and impactful ways, leaving ample room for innovation.

We can begin to tackle how to integrate technology by exploring the reasons why audiences currently prefer either digital or analogue cultural experiences in the first place.

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

Those who find digital appealing appreciate the role that it can play in deepening the experience by curating additional information, and providing an increased understanding of the content. They are also drawn to the way that it makes experiences more shareable: the fact that digital allows them to share their experience with their friends and family.

Equally interesting, however, are the reasons why audiences find cultural experiences *without* digital integration appealing. For some, activities that do not incorporate technology feel more authentic, enable them to focus and connect to the content more deeply, or are just simpler overall.

Top Reasons Why Analog Appeals in Cultural Activities

1. Feels more authentic

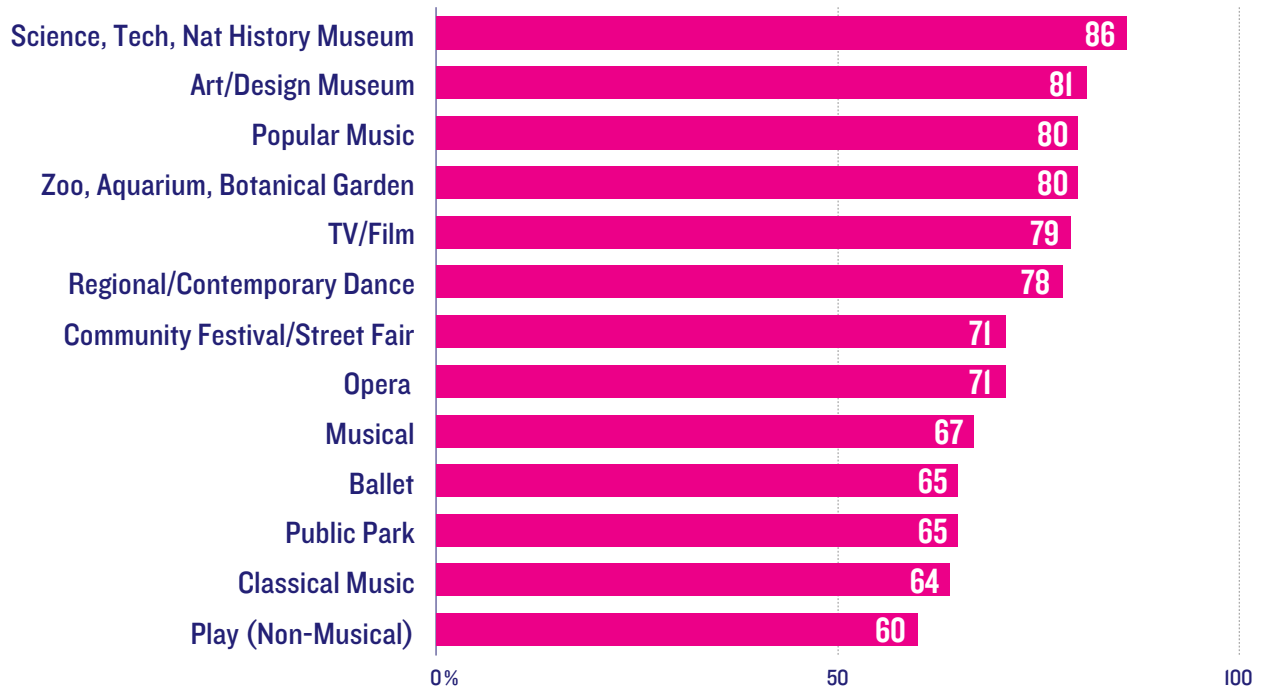
2. More focus on the activity

3. Less complicated

4. Better connection to content

Looking forward, however, the majority of audiences are open to integrating technology across a broad range of cultural activities.

Desire for Digital Experiences in Cultural Activities



This represents a great opportunity for identifying how and if technology can truly enhance and deepen the cultural experience in ways that nothing else can—making the future of digital in cultural experiences about much more than a shiny new device or an app.

Therefore, when exploring a new digital strategy or initiative, organizations should start by asking questions such as: Is this enriching, or distracting? Does this simplify the experience, or make it more complicated? Most importantly, does this feel authentic to who we are and how our audiences engage with us?

Spotlight Stats

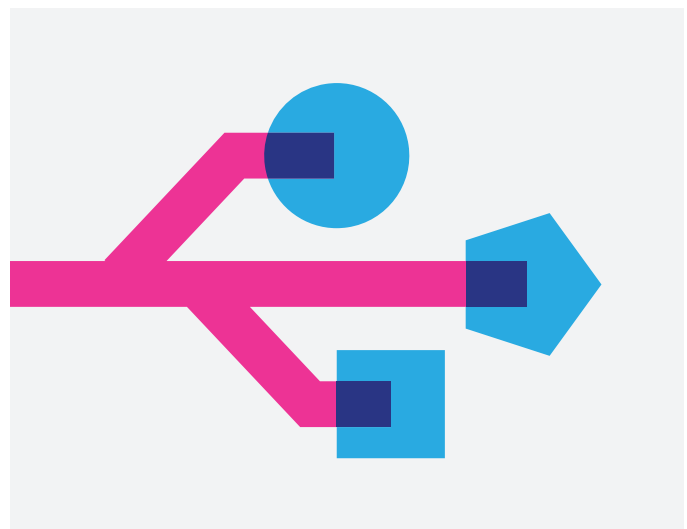


For parents (and families), tech is a plus.

Who's interested in boundary-pushing technology? It turns out that it's parents. Adults with children living at home are 52% more likely than those without to say that wearable technology would enhance a cultural experience. They are 50% more likely to say the same about online/video games, and 33% more likely to say the same about virtual or augmented reality. Gadgets and gizmos are appealing to teens and tweens, so perhaps parents are learning from them—and finding that digitally-integrated experiences can be a great tool for parents to persuade their kids to become invested in culture.

Digital and social can have a broader impact.

Like parents, people of color—broadly defined—embrace digital technology within their cultural experiences. When it comes to what specific type of digital intervention might be best, people of color were 31% more likely to say social media and 31% more likely to indicate streaming video.



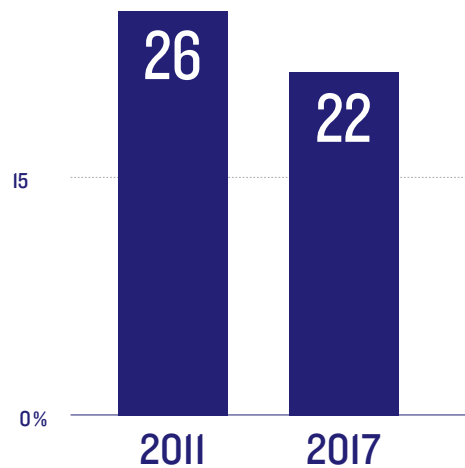
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The Loyalty Revolution

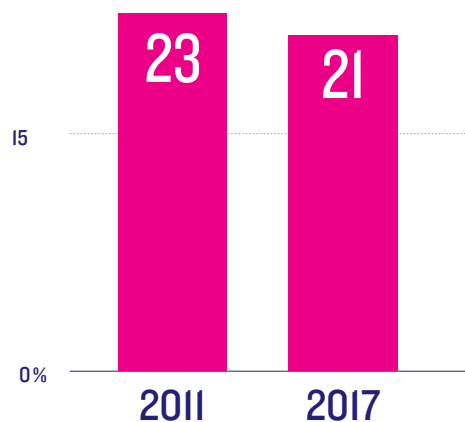
Since 2011, there has been a flat or downward trend in memberships and subscriptions—a phenomenon that we coined as “cultural promiscuity” back in 2014, emphasizing the difficult nature of pinning down audiences and convincing them to be loyal to any one cultural organization.

This trend continues in 2017, with less than a quarter of cultural audiences holding either a membership or a subscription to a visual or performing arts organization.

Visual Arts Memberships

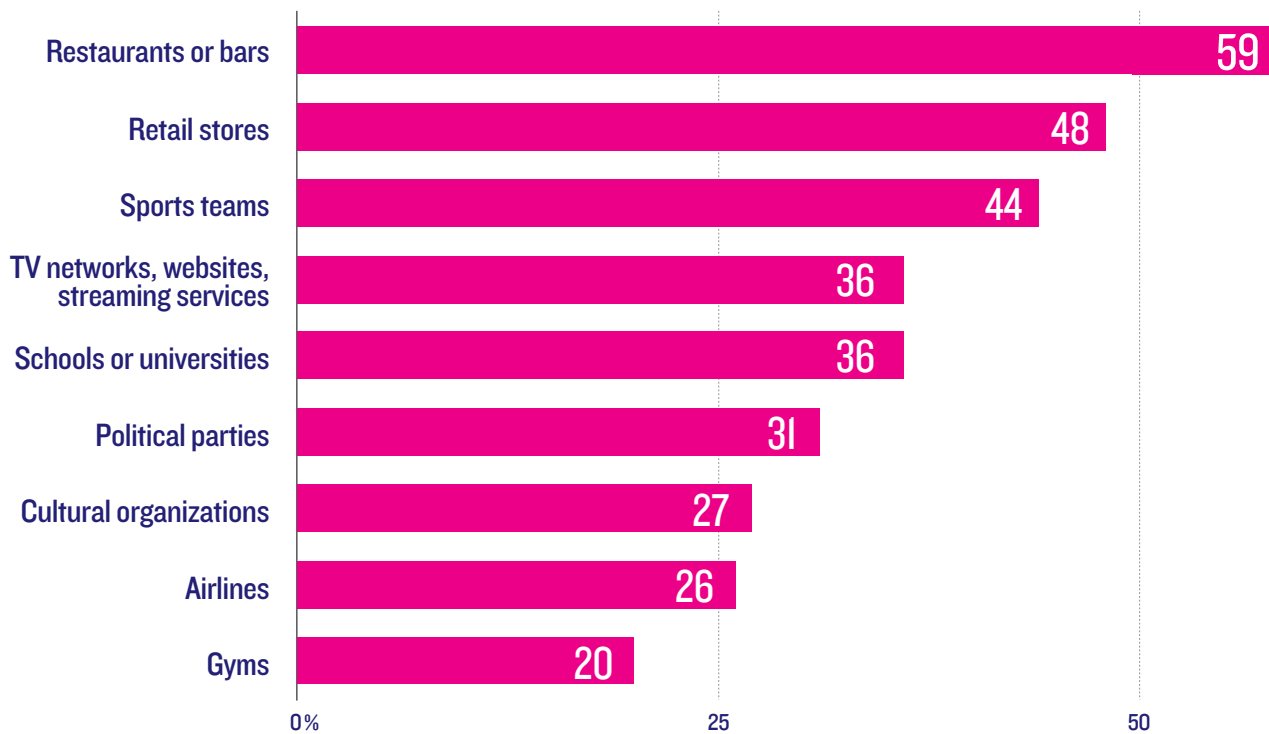


Performing Arts Subscriptions



This does not mean, however, that people are no longer loyal. There are thousands of companies and causes outside of the cultural landscape that audiences are committed to, ranging from coffee shops to clothing brands to political parties, all of which are competing for their time, money, and attention.

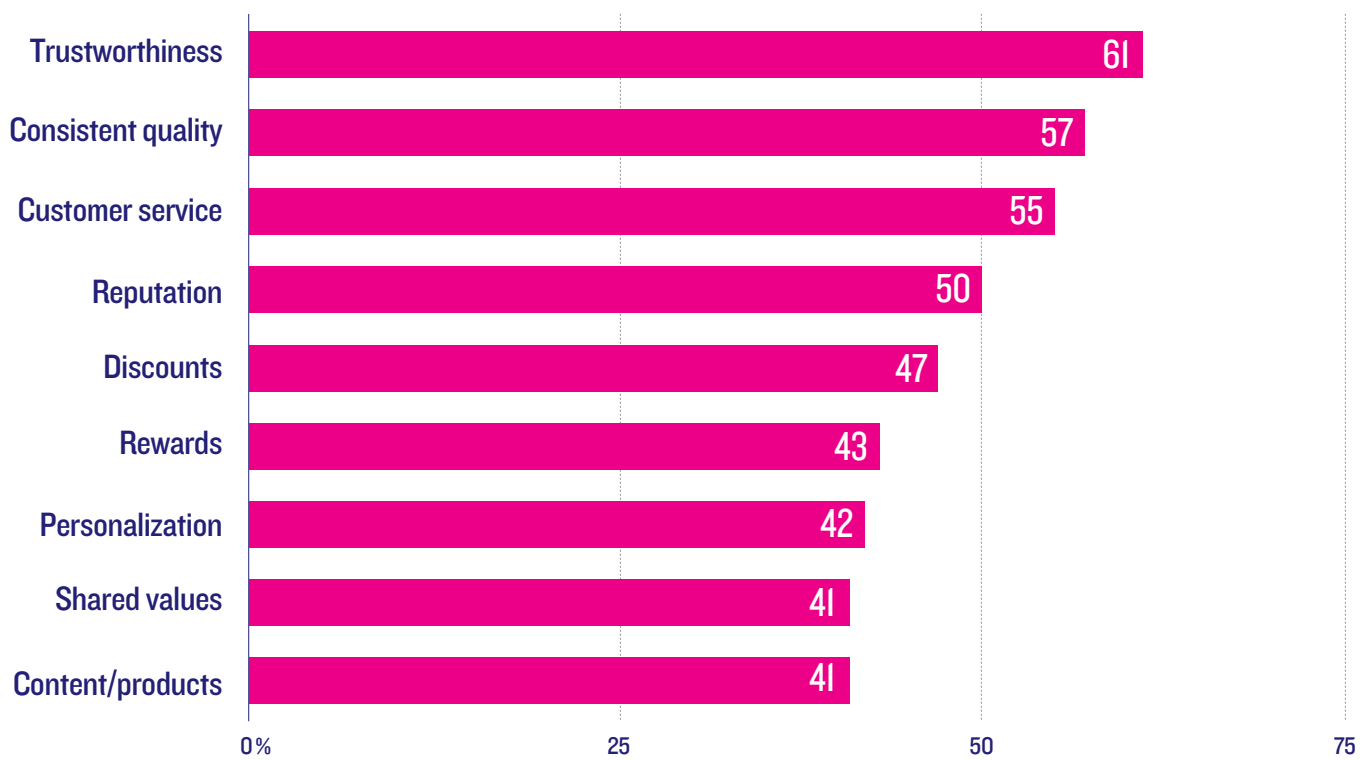
Audience Loyalties



With this in mind, we assessed audiences' loyalty behaviors from the "outside in," exploring their relationships with entities beyond culture to help inform what the future of affinity might look like in the cultural sphere.

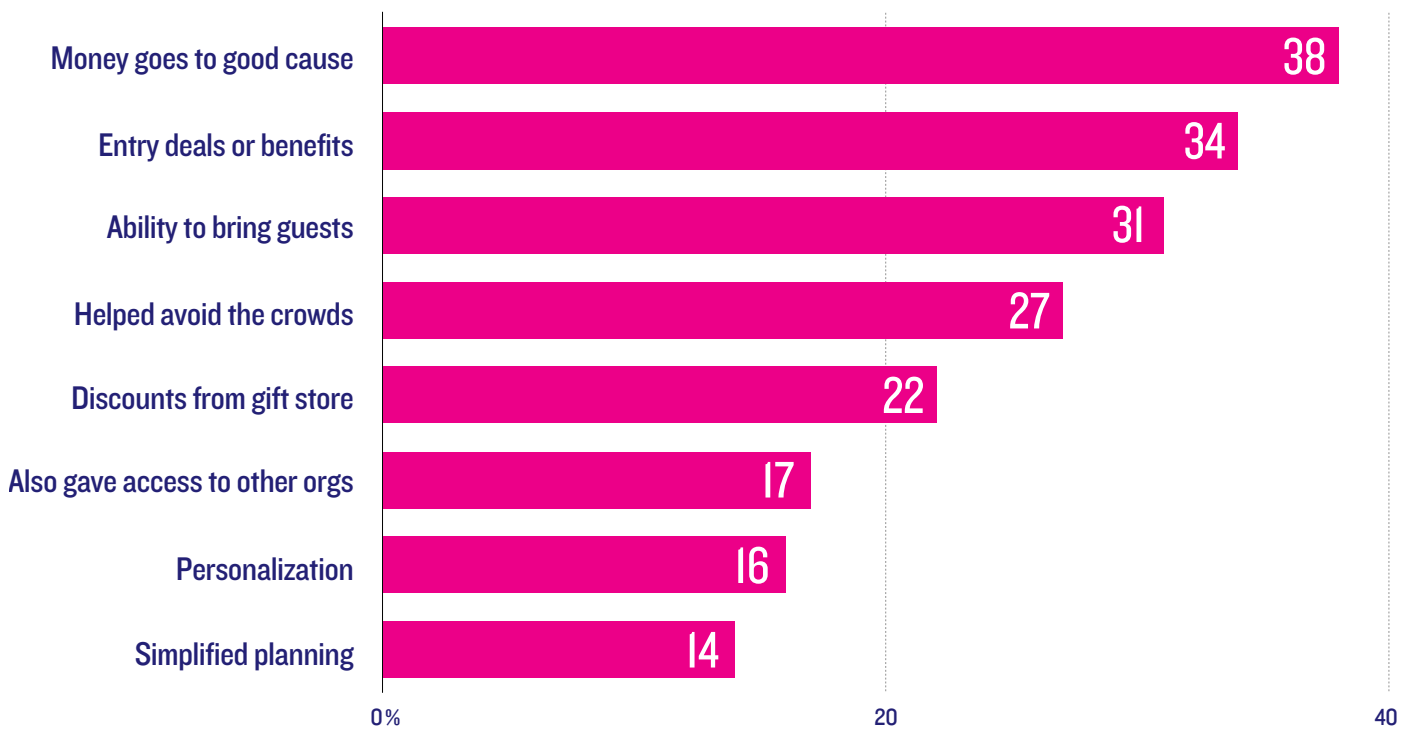
We found that the motivators for loyalty go far beyond the economic and the transactional. Instead, audiences view their loyalty to an organization as a personal relationship, and their ideal partner is trustworthy (the number one motivator at 61%), consistent (with 57% citing “consistent quality”), and kind (with 55% citing “quality of customer service”).

Motivators for Loyalties



Importantly, audiences value not only how organizations treat them, but also how they impact the rest of the world. The most common reason audiences said they would be motivated to join a loyalty program had nothing to do with discounts, perks, or convenience; it had to do with supporting a good cause. Regardless of an organization’s main focus, when it comes to building loyalty, making a case for impact or corporate social responsibility is a key ingredient.

Motivators for Joining Loyalty Program

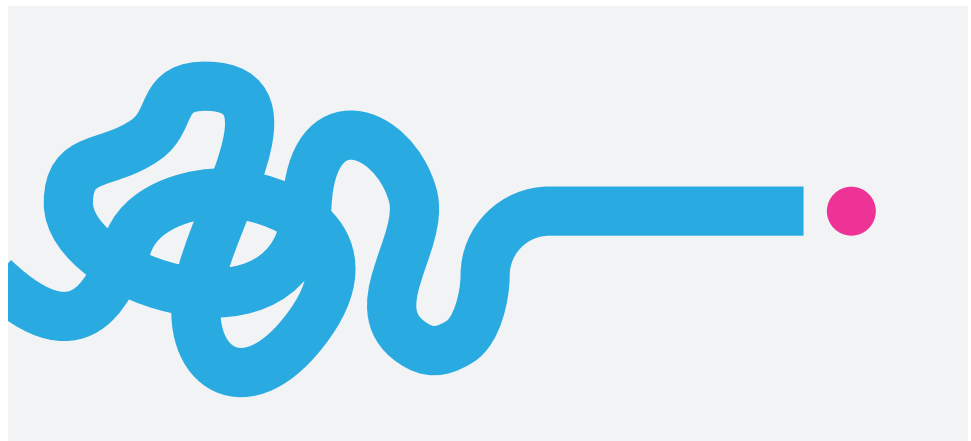


We have reached a tipping point, where new models for cultural loyalty must be developed in order to forge meaningful relationships with audiences. As we conceptualize what those might look like, organizations must keep in mind how culture’s extraordinary assets—such as its ability to build community, or its purpose-driven nature—can be harnessed to build authentic, reciprocal, and long-lasting relationships that matter.

Spotlight Stats

When it comes to parents' loyalty, keep it simple.

Parents are 21% more likely than non-parents to join a loyalty program that simplifies their planning; 25% more likely to join because of on-site facilities that simplify their experience, such as on-site childcare, or child-friendly activities; and 31% more likely to join if organizations provide follow-up information so they can easily stay involved. In addition, they are also 36% more likely to desire a membership that includes access to other organizations—which simplifies their lives on an even greater scale.



For younger generations, to tweet is to care.

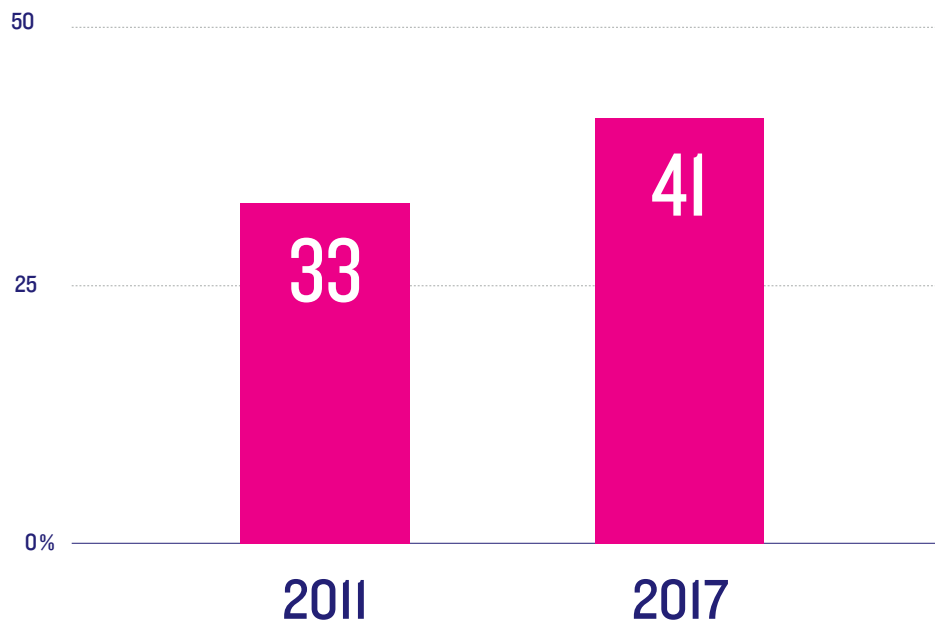
Unsurprisingly, it is the younger generations that are rethinking what loyalty means today. While Gen Z and Millennial culture-goers are less likely to conceive of loyalty as buying products, making donations, or joining formal programs, over one-third feel that engaging with an organization on social media is an act of loyalty.

7

The Case for Support

In this democratized landscape, audiences can fill their time with plenty of culture—film, music, festivals, and more—that do not solicit or depend on donations to exist. And yet, audiences still plan to give consistently to organizations that do.

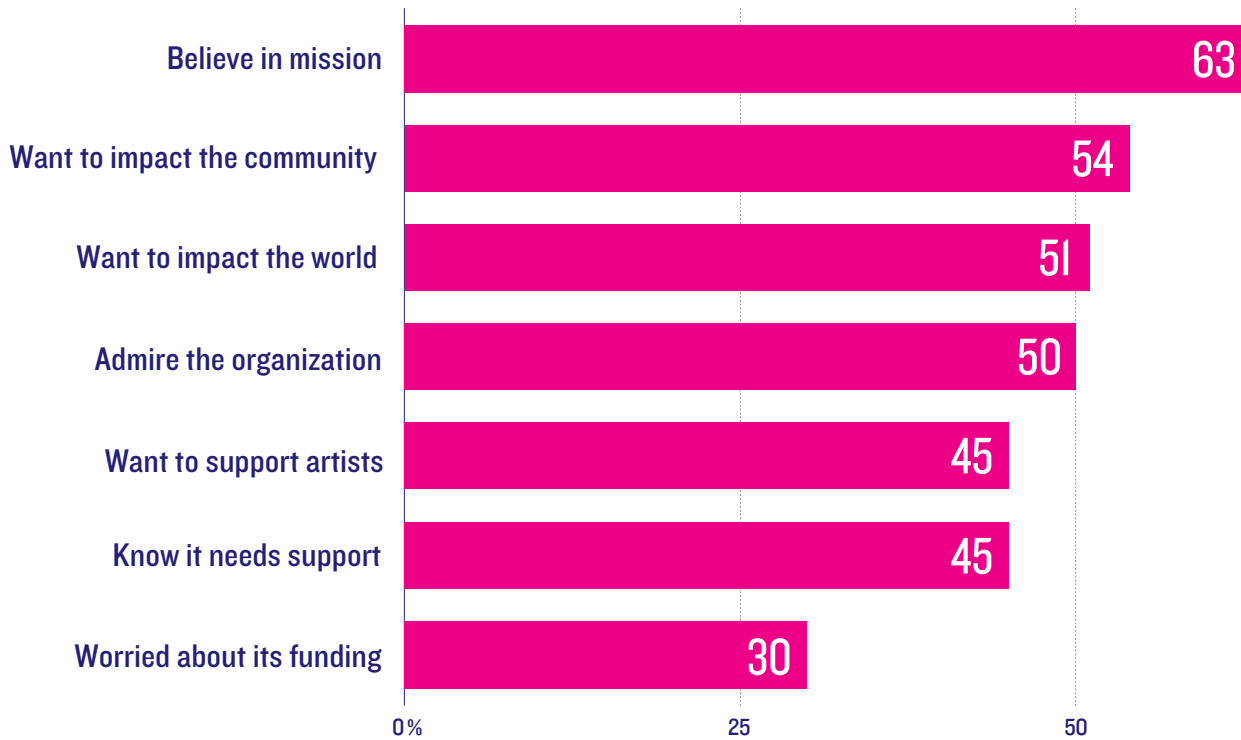
Plans to Donate to Culture



Why do they plan to give, and how can we ensure that they continue to act on that impulse?

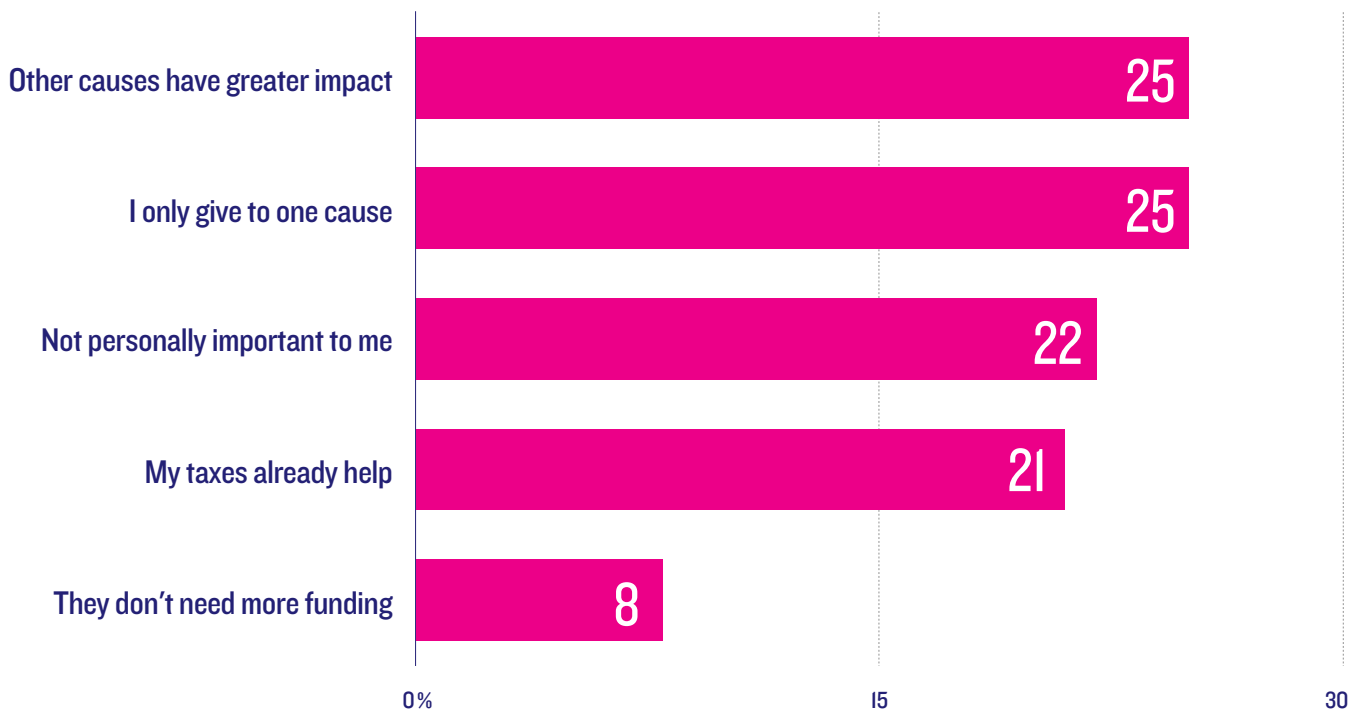
The top reasons for donating to culture all have to do with social impact. Donors believe in the very real and indelible mark these organizations make. And, in fact, when you look at the reasons why audiences do not donate to culture, the same considerations apply—they donate to organizations that they believe have the greatest impact, and they don't believe that cultural organizations fit the bill.

Motivators for Donating to Culture



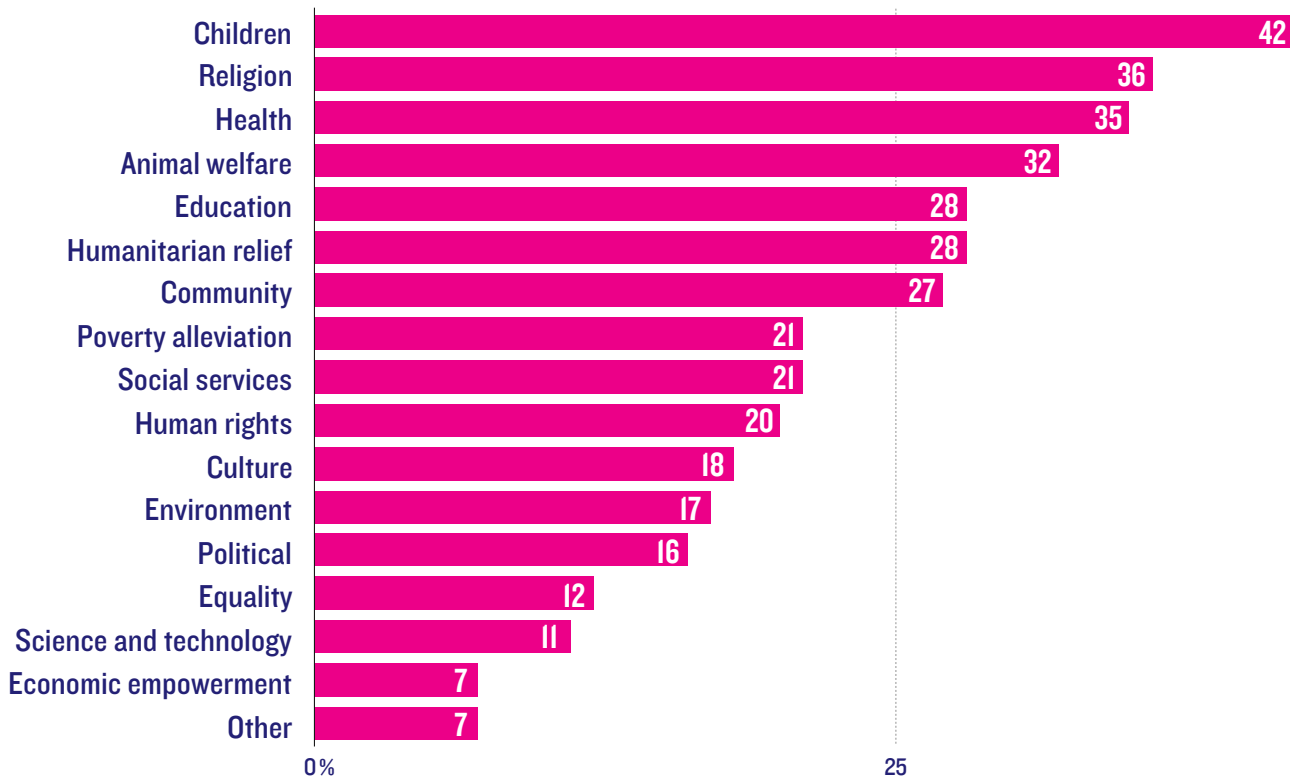
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Reasons for Not Donating to Culture



When you look at the causes that audiences donate to the most—at much higher rates than cultural organizations—they are ones with clear, measurable, and tangible impacts, like health, education, and humanitarian relief.

Comparative Appeal by Philanthropic Cause

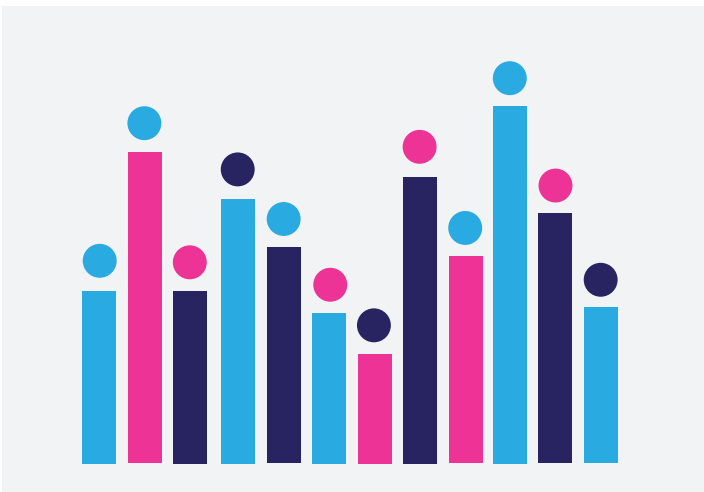


But we all know that cultural organizations have a profound and unique impact on the world too—culture may not physically save lives, but it surely makes them better. With social impact as the main driver of donations, cultural organizations need to work harder to measure and then articulate what their distinct impact is. This becomes more and more important as organizations’ philanthropic core ages, and the need for an influx of new donors is more pressing.

As we think about creating the “new philanthropy,” our approach must change from every angle: how and where we approach potential donors, what we ask of them, and, most crucially, what they want in return.

The Case for Support

Spotlight Stats



For Pre-Wars, community is king.

The Pre-War generation gives most to community organizations, unlike its younger counterparts. Nearly half of Pre-Wars give to community organizations, which makes them 55% more likely to do so compared to younger generations. So, when approaching Pre-Wars, it is important to keep community impact at the center of the ask.

Culture and social change are intertwined.

Millennials are uniquely interested in human rights and equality, where their giving doubles that of Gen X, Baby Boomers, and Pre-Wars. People of color are similarly committed to these issues, being 44% more likely to donate to human rights causes and 71% more likely to donate to equality organizations than non-Hispanic Caucasians. It is therefore increasingly important to focus on culture's role in sparking social change and engaging in civil and human rights.





Sponsorship of culture is a business win.

As the competition for contributed dollars becomes more and more fierce, cultural organizations need to better articulate the business benefits of sponsorship to corporations. When approaching potential sponsors, organizations can assert that cultural consumers feel positively about corporations who sponsor culture: 58% say they feel good about doing business with corporations that support cultural organizations, 50% say that they're more likely to buy from those corporations, and 46% say they're more likely to listen to their message.

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**Conclusion:
The Redefinition
Of Culture**

1 “Culture”

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.

5 SROI

The future of cultural philanthropy will be interest-tailored and impact-driven, with greater emphasis on “SROI”—Social Return on Investment.

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