

CULTURE TRACK '17

LaPlaca
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Kelton

CultureTrack.com

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A version of this document was presented at TheTimesCenter in New York City on October 17th, 2017, by Arthur Cohen, CEO, and Maggie Hartnick, Managing Director, LaPlaca Cohen.

Culture Track is an initiative of LaPlaca Cohen, a strategy, design, and marketing firm for the cultural world. Research was undertaken in partnership with Kelton Global.

Learn more about Culture Track at CultureTrack.com.

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About Culture Track



Culture Track is a national online survey of cultural consumers' attitudes, motivators, and barriers to participation.



Data collected from

4,035

**cultural consumers mirroring U.S. demographics,
divided into 2 data sets**

Data Set 1: Ongoing Tracking

- Core questions that track key trends since 2001**
- Select set of cultural activities**
- Sample size: 1,022**
Margin of error: +/- 3.1%

Data Set 2: Future Forecasting

- Updated questions to help chart the future of culture**
- Expanded set of cultural activities to reach a more diverse sample**
- Sample size: 3,013
Margin of error: +/- 1.8%**

Culture Track

62%

Non-Hispanic Caucasians

17%

Hispanic

15%

African-American

4%

Asian

U.S. Population

61%

Non-Hispanic Caucasians

17%

Hispanic

13%

African-American

5%

Asian

Region

19%

Northeast

23%

Midwest

37%

South

21%

West

Household Income

25%

Less than \$30k

41%

\$30k - \$74k

28%

\$75k - \$149k

6%

\$150k +

Generational Segments

20 - 35

Millennials

36 - 52

Gen X

53 - 71

Baby Boomers

72+

Pre-War

2

A Paradigm Shift

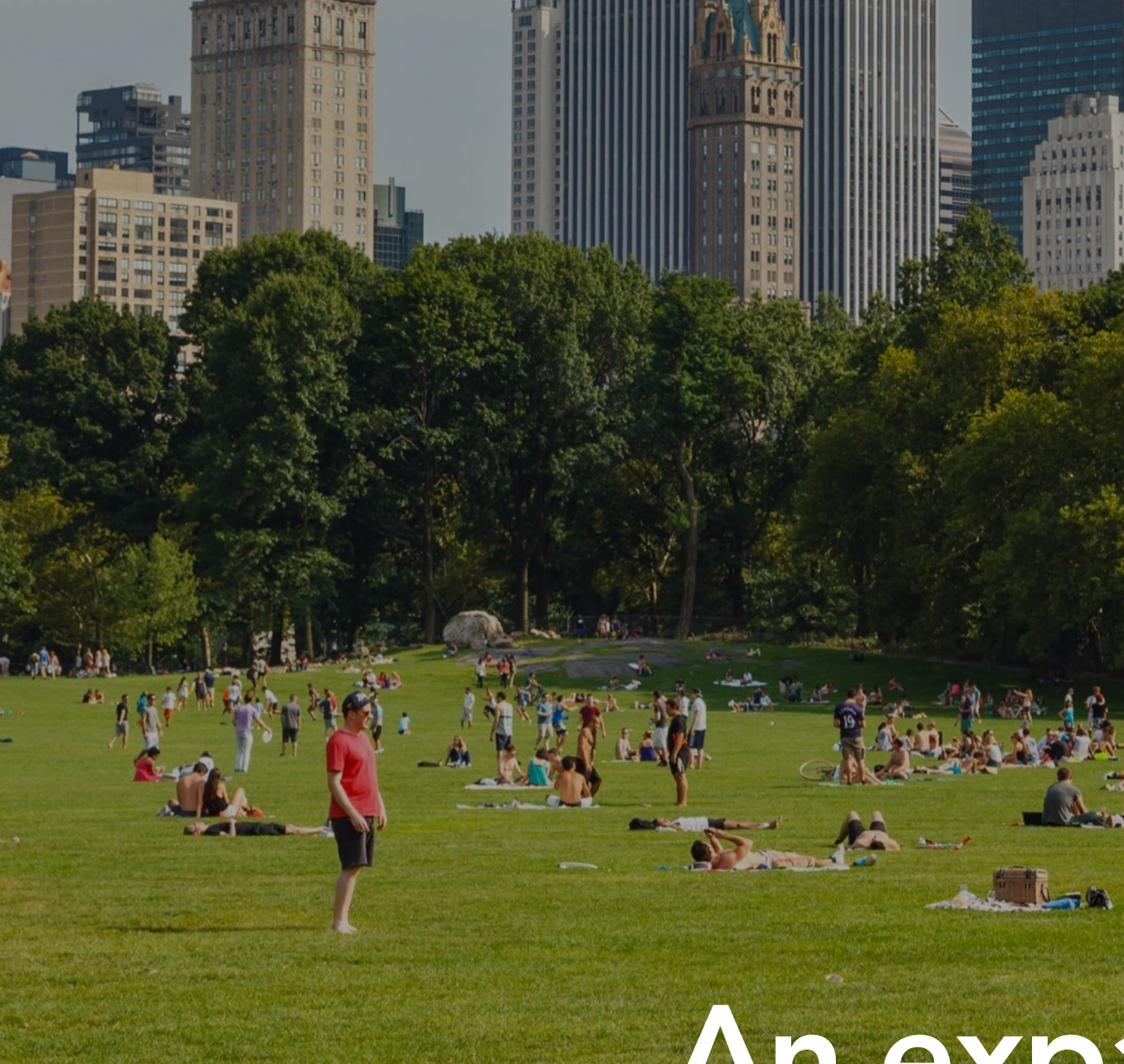


**The world has fundamentally changed
since Culture Track was first launched
in 2001:**

-
- **Expansive new modes of communication and connection**
 - **Transformed patterns of giving**
 - **Endless options for leisure time**



These shifts have radically transformed culture as well — beginning with its very definition.



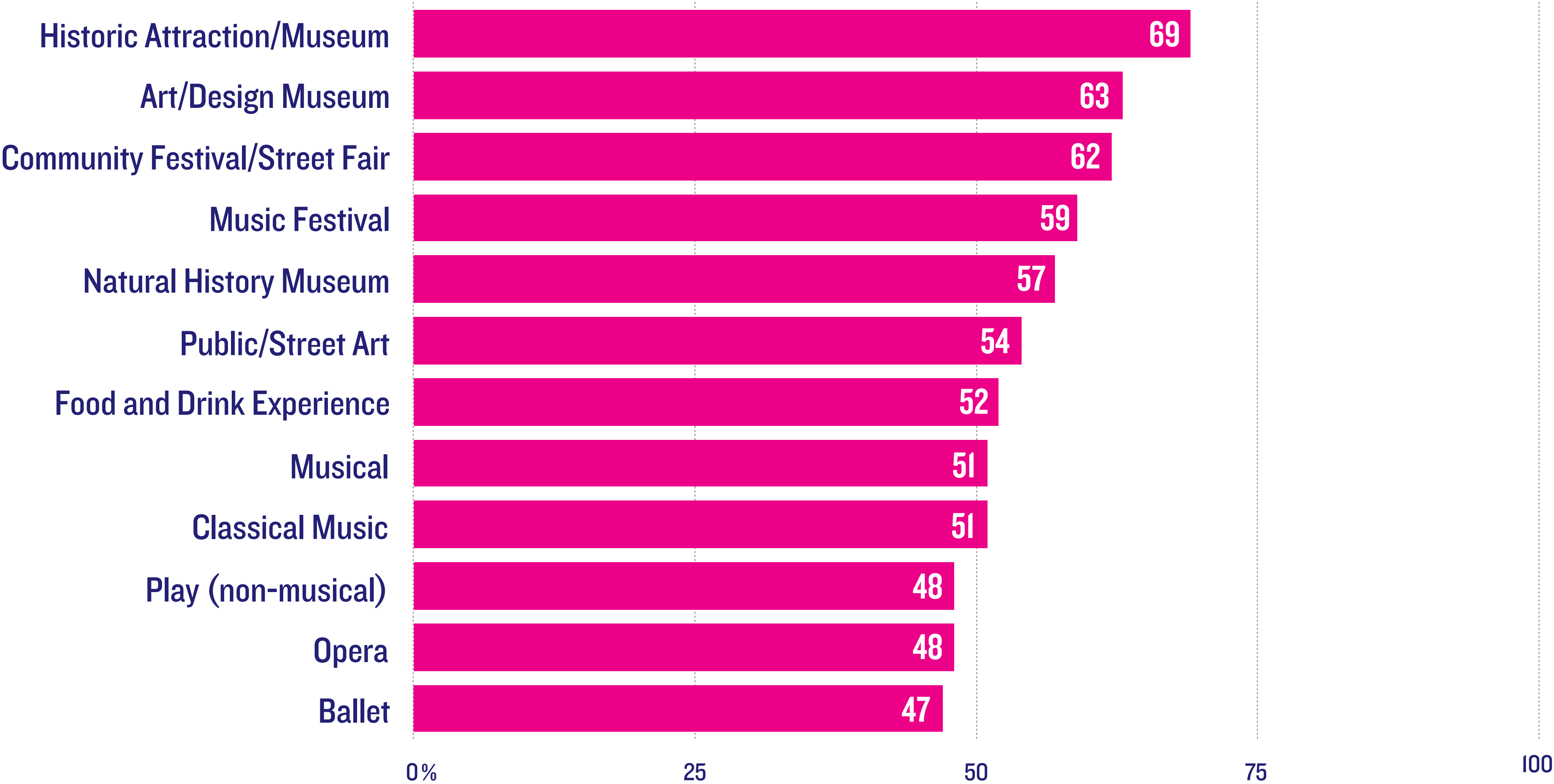
An expanded definition of culture



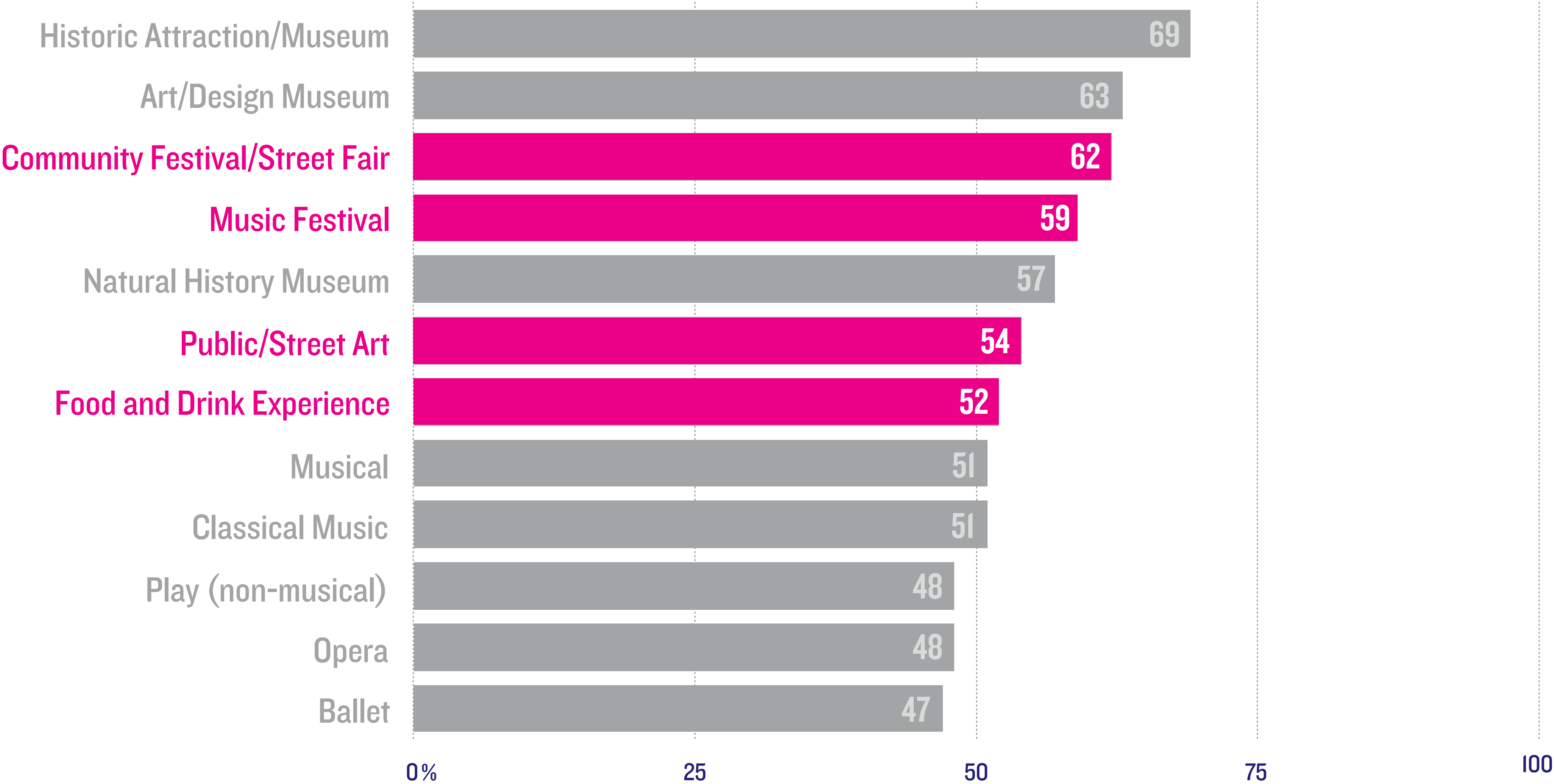


Today, the definition of culture has democratized even further, possibly to the point of extinction.

Activities Defined as "Culture"



Activities Defined as "Culture"



**This presents a complete
paradigm shift.**

Audiences do not place priority on whether an activity is “culture” or not.

Now, culture can be anything from Caravaggio to Coachella, Tannhäuser to taco trucks.




But if the traditional notion of “culture” is extinct, what is culture’s purpose in a new and increasingly complex world?



**Culture's definition may be in flux, but
its value can be greater than ever . . .**

**. . . if we can re-assert its meaning in
this radically changed landscape.**



Fortunately, the very audiences that are breaking down the definition of culture are also helping to rebuild a new one.

Transforming Perspectives

“ Having it change the way you think or challenging 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. It needs to bring understanding and acceptance. ”

3

The New Cultural Consumer



In order to understand this paradigm shift, we need to look into the hearts and minds of the people who are driving it: cultural consumers.

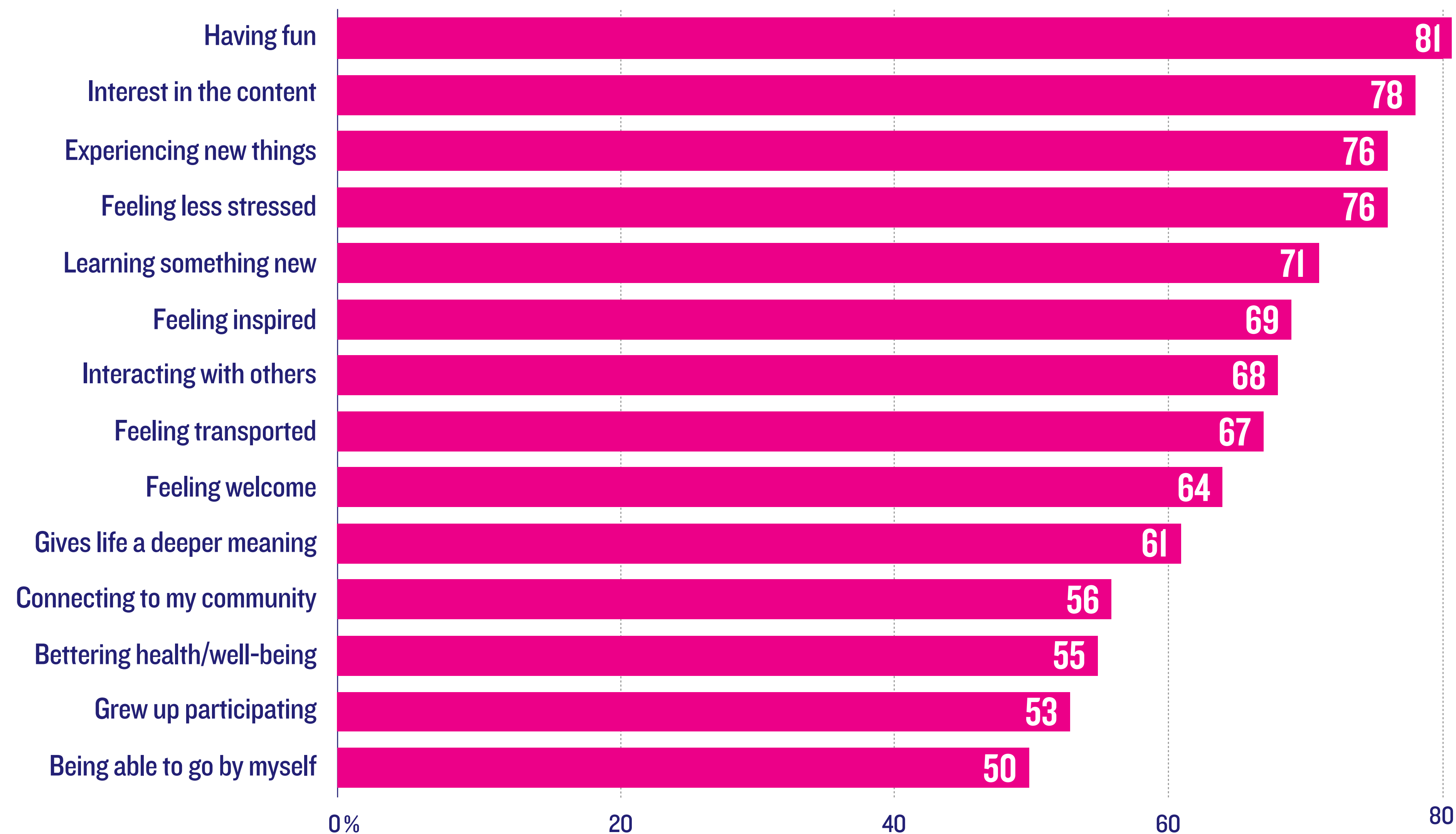
-
- **What is the mindset of this new cultural consumer?**
 - **Why do they engage with culture in the first place?**
 - **What causes them to stay away?**



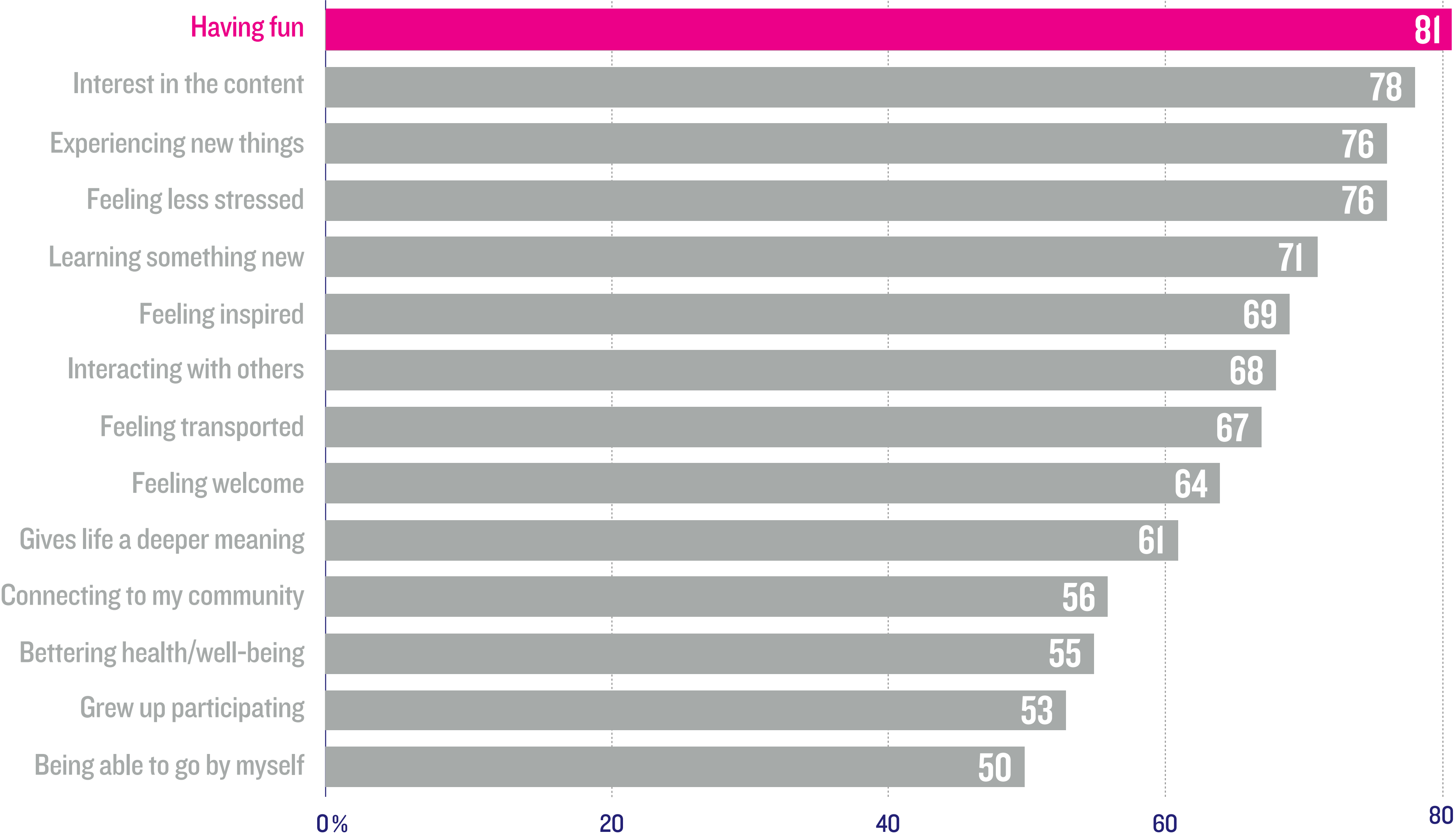
The single greatest motivator:

Having fun.

Motivators For Cultural Participation



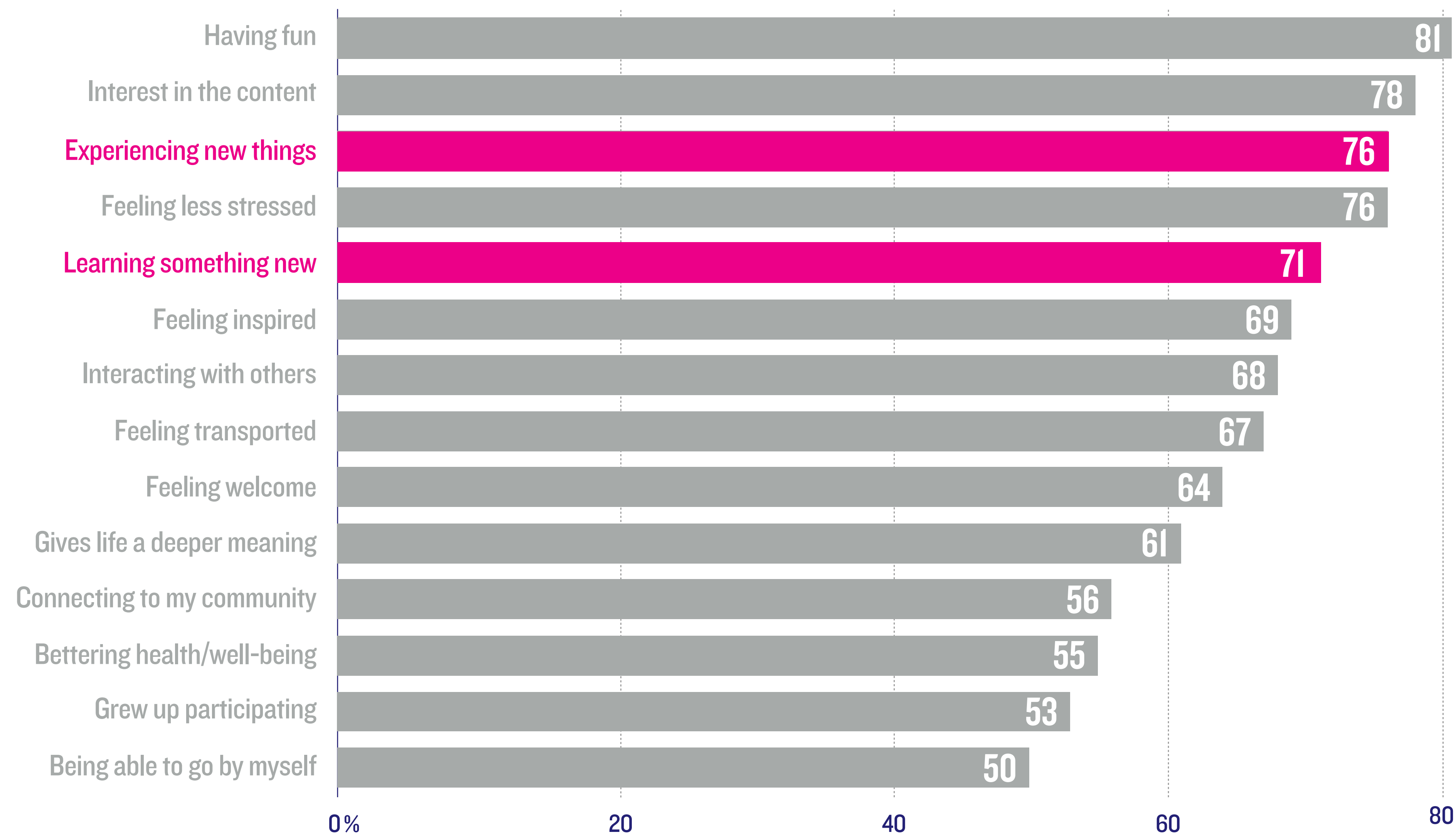
Motivators For Cultural Participation





Audiences also have a variety of other important reasons for putting cultural activities at the top of their list.

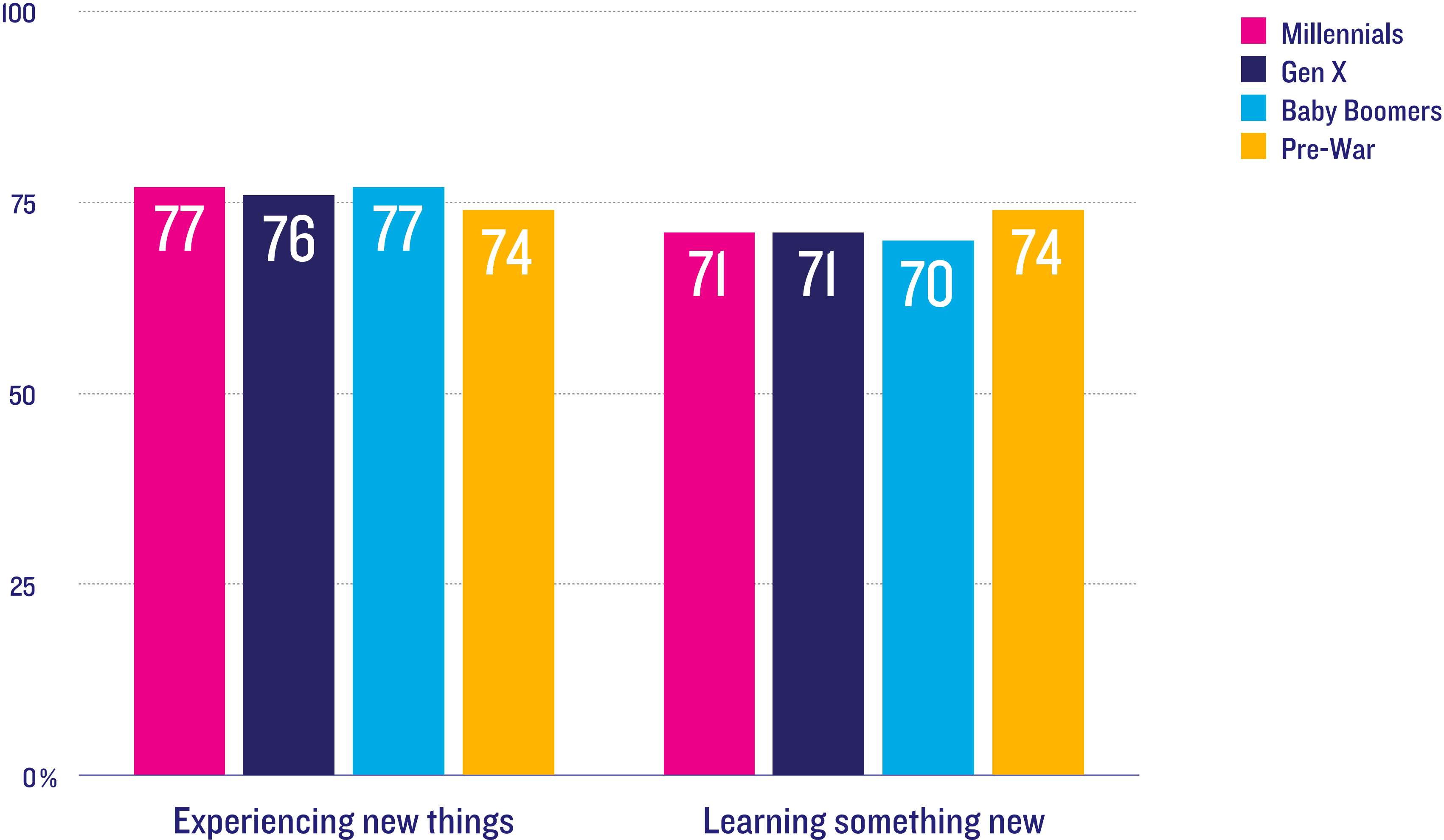
Motivators For Cultural Participation




Audiences seek out culture as a critical element of their personal development and exposure to new ideas.

This desire for self-improvement is consistent across generations.

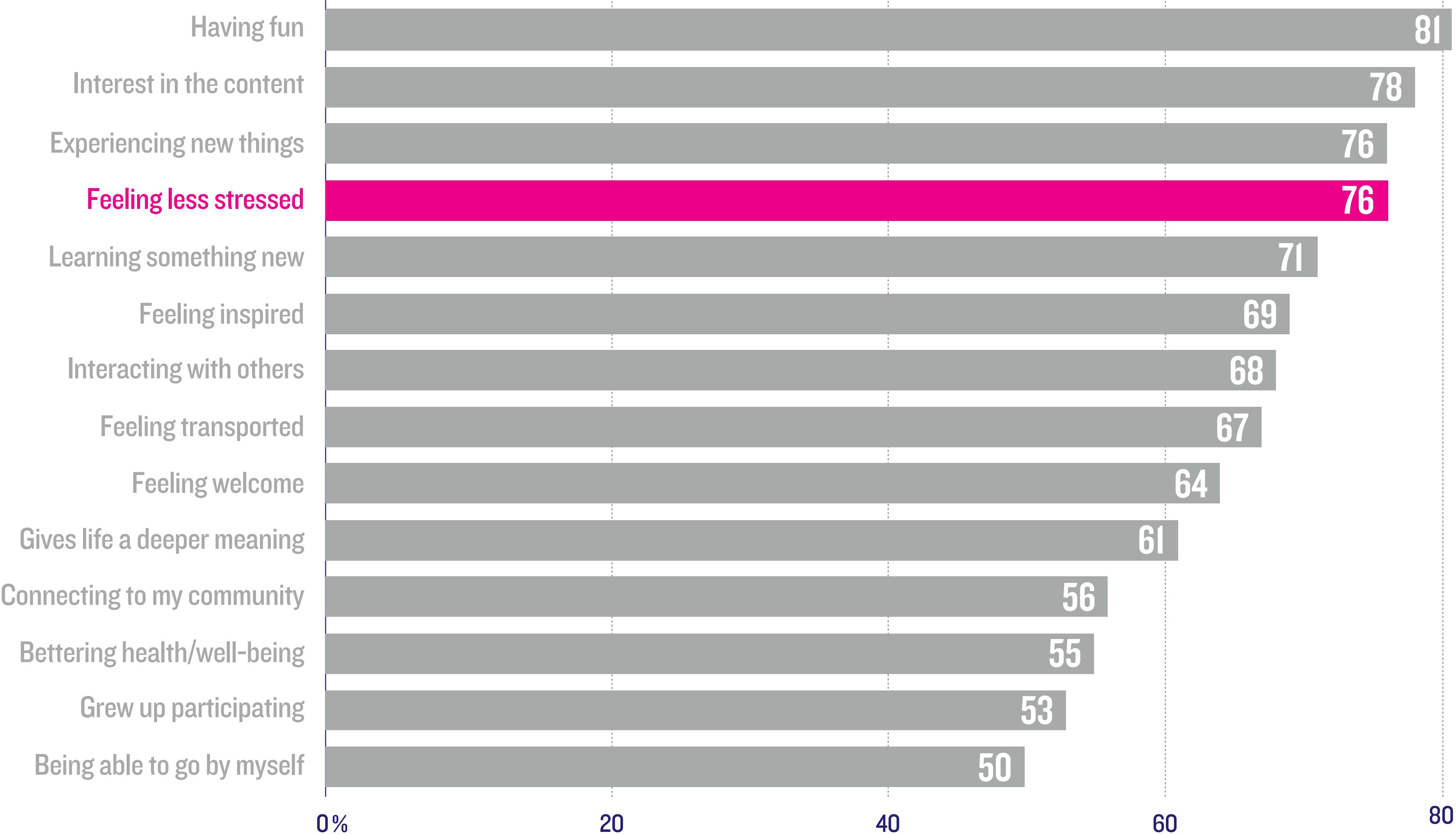
Motivators For Cultural Participation (By Generation)





One of the most surprising findings is that audiences of all ages are also choosing culture as a major form of releasing stress.

Motivators For Cultural Participation






**When it comes to understanding why
culture can drive audiences away,
personal relevance is critical.**

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



Addressing the reasons why this barrier exists is one of the most important challenges for organizations moving forward.

The New Cultural Consumer

Spotlight Stats

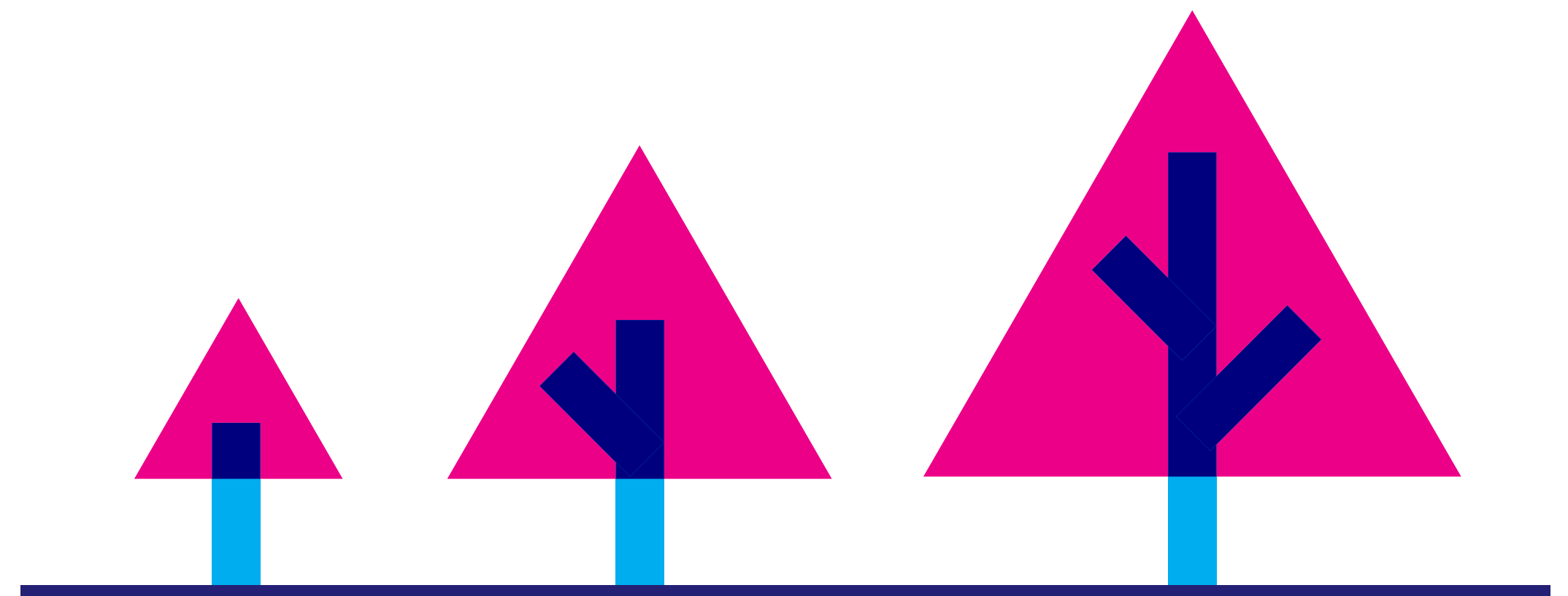


Early exposure matters.

Frequent attendees are

39%

more likely to participate
because they grew up
doing it.

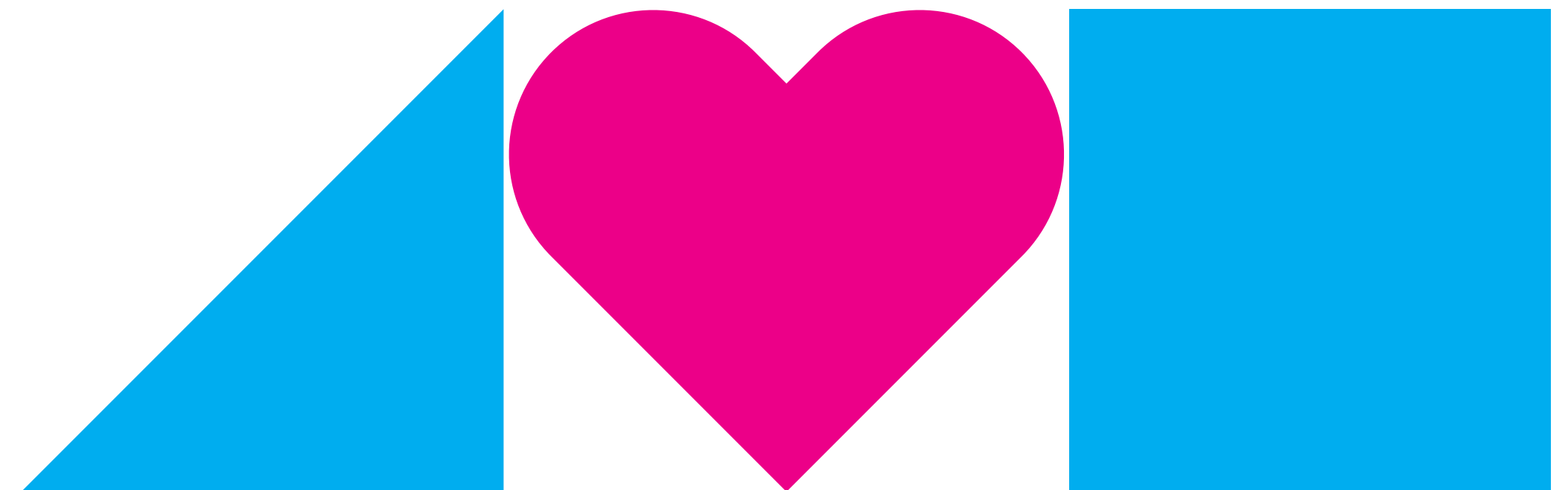


Accessibility without empathy will backfire.

People with disabilities are

59%

more likely to avoid
traditional cultural
activities because of a
negative experience.

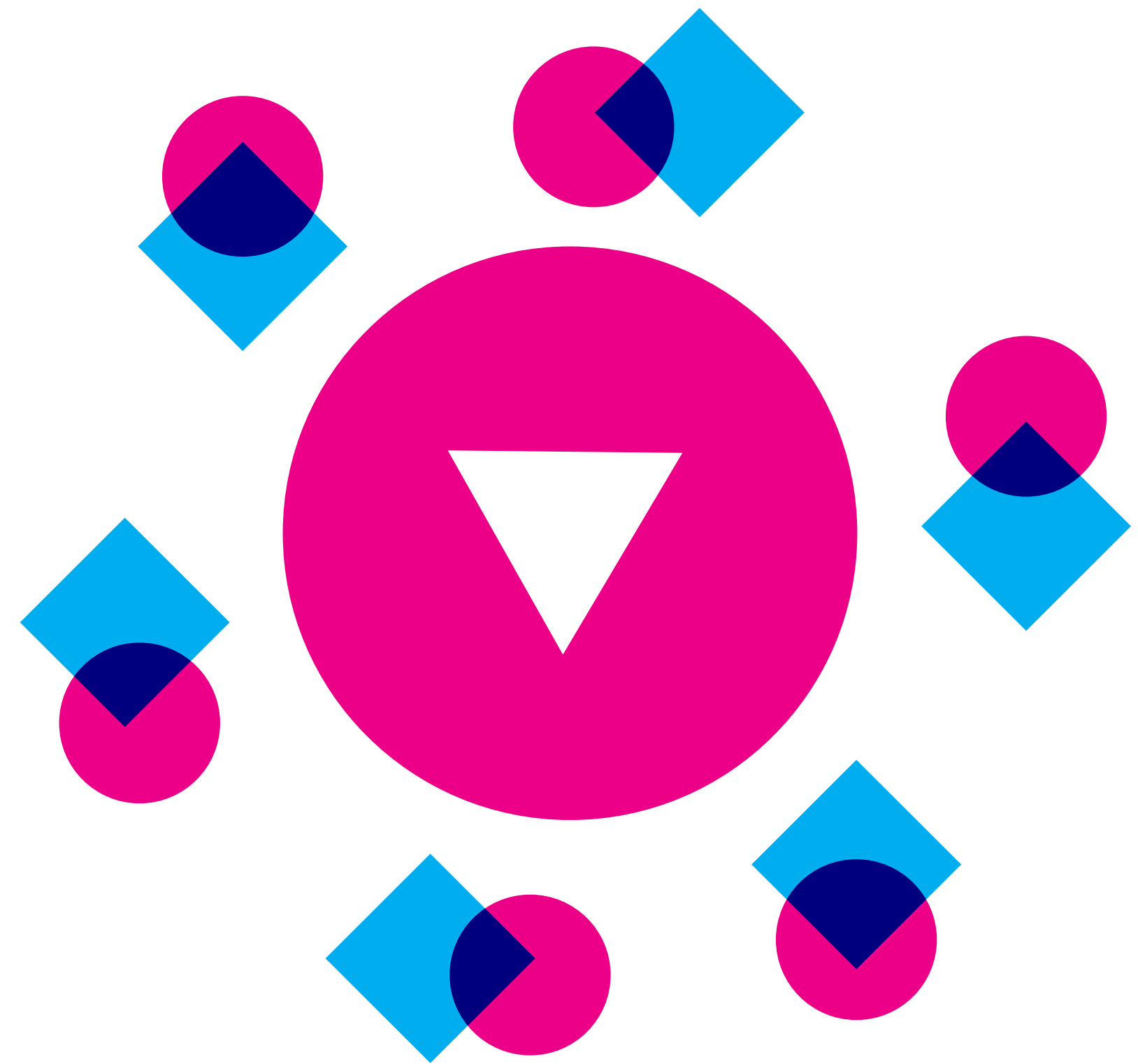


Diversity means representation.

People of color are

82%

more likely to stay
away because activities
don't reflect people
of a range of backgrounds.




4

The Omnivorous Experience



**The first step is getting audiences
in the door, but what do they want from
cultural experiences once they arrive?**

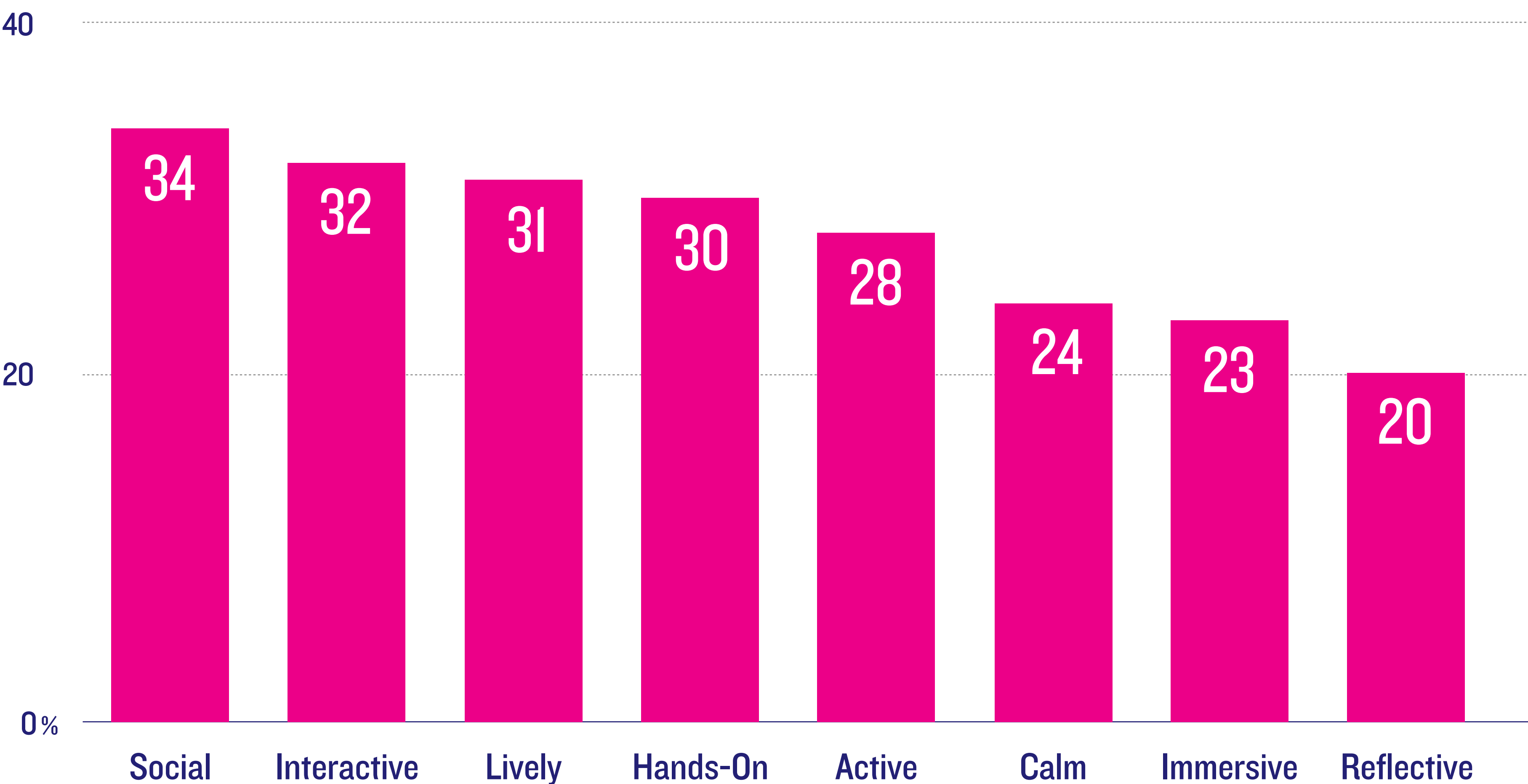


**Many have tried to segment audiences
into experiential typographies:
grouping people based on their desired
characteristics of an experience.**

**But in 2017, there is no one
ideal type of cultural experience.**

**Audiences have different needs
and wants at different times —
or even simultaneously.**

Characteristics of an Ideal Cultural Activity



Characteristics of an Ideal Cultural Activity (Overlaps)



Of those who choose "calm,"

15%

also chose "active."

Characteristics of an Ideal Cultural Activity (Overlaps)



Reflective

Of those who
choose "reflective,"

24%

also chose "social."

2014

Cultural Omnivores:

Instead of focusing on one type of activity, culture goers were sampling various forms.

2017

Experience Omnivores:

Audiences now hunger for and expect experiences that suit their every need and mood.

Cultural Organizations Can React in One of Two Ways



Portfolio approach



Singular focus

The Omnivorous Experience

Spotlight Stats



To go it alone or not: audiences want both.

An average of

78%

of those motivated to
go alone also want to
interact with others.

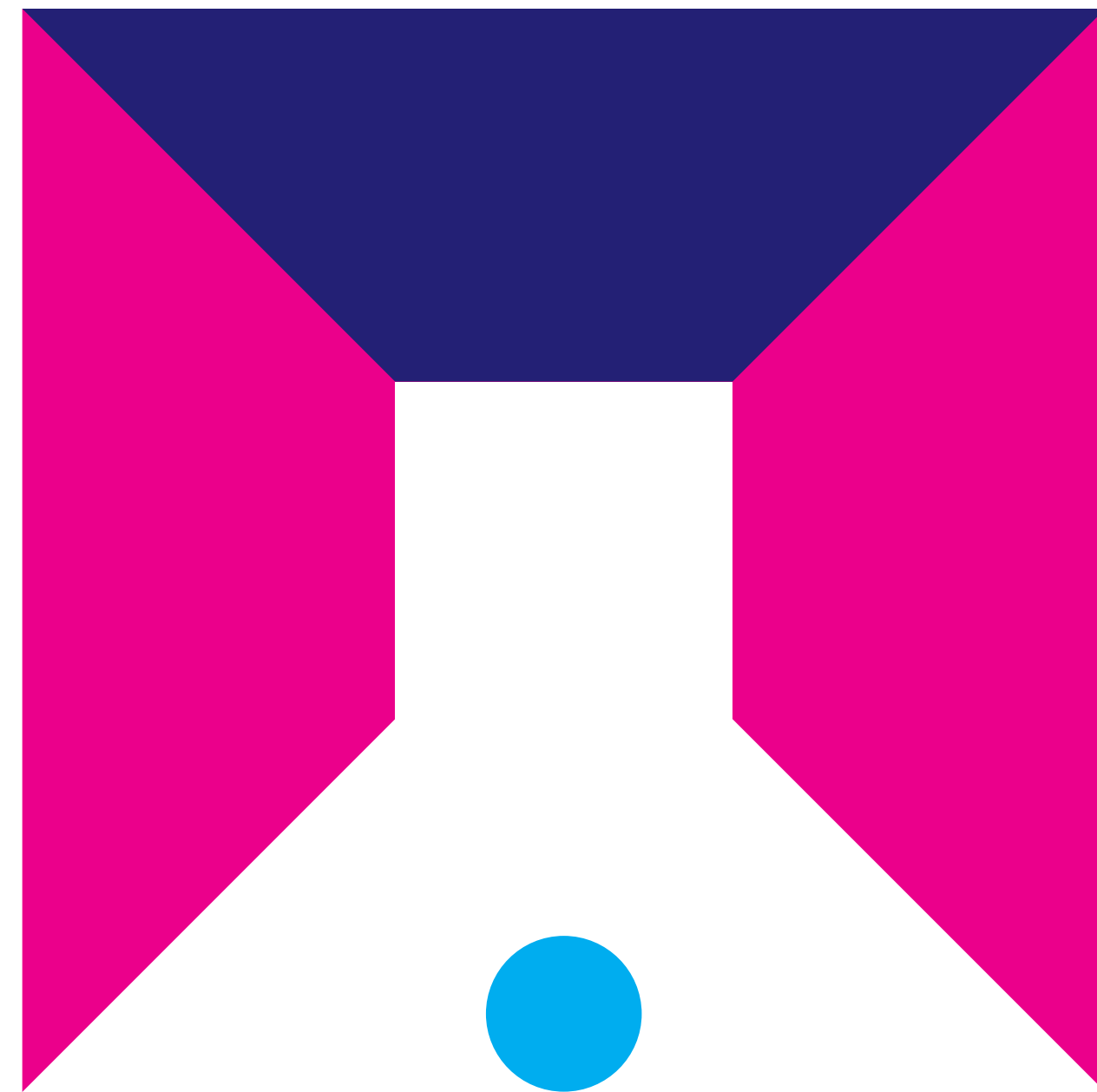


Culture connects us to reality, and lets us escape it.

Over

80%

of those who participate to
connect to their community
also want to be **transported**.

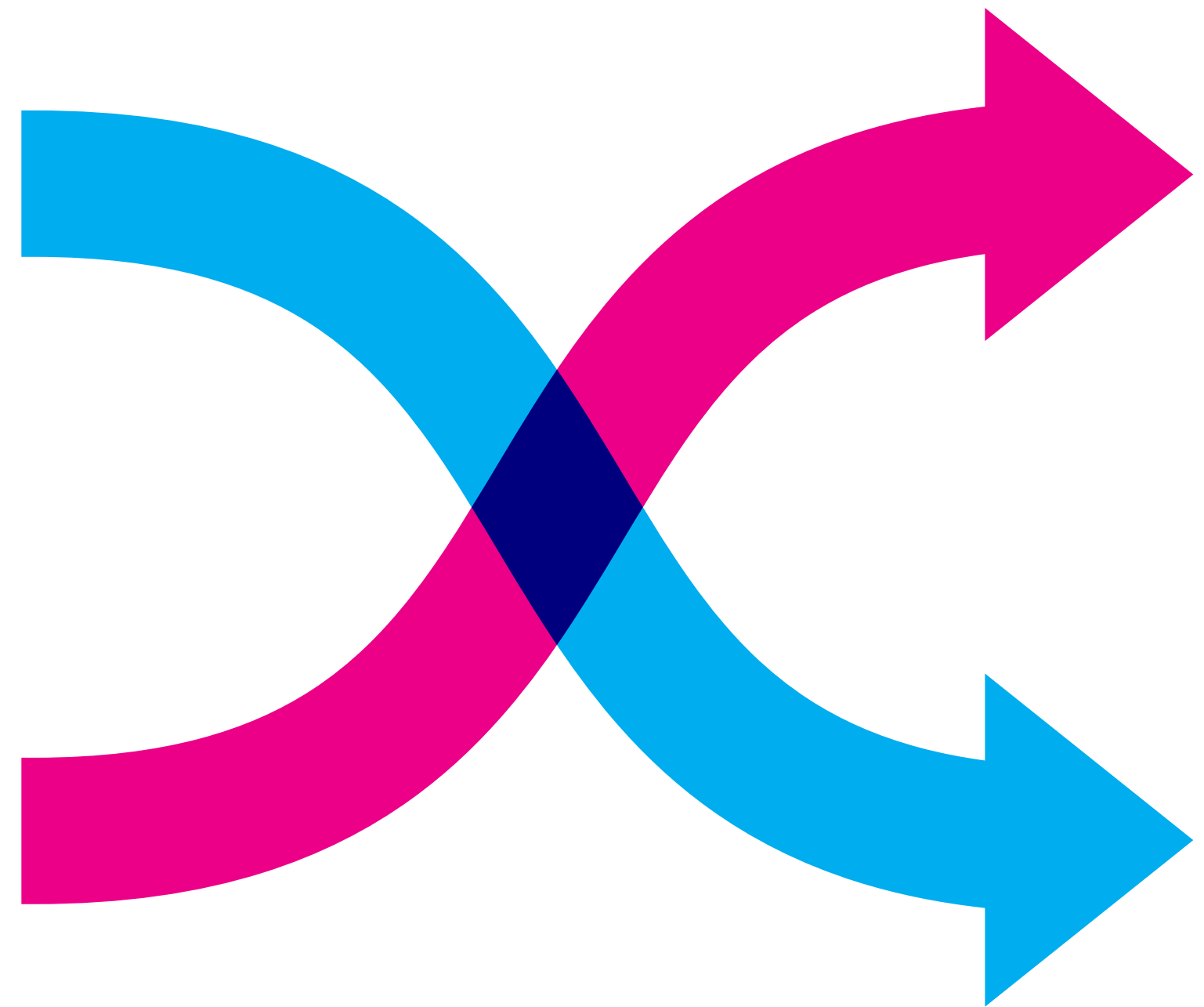


Cultural diehards always want something new and different.

Frequent attendees are

94%

more likely to stay away
if the experience is seen
as unchanging.



5

The Digital Dilemma



Technology and media have fundamentally altered how people engage in every facet of life, including culture.



Audiences have a range of perspectives on how digital technology currently enhances or detracts from their experience.

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

For others, however, cultural experiences are more authentic, focused, and engaging *without* digital.

Top Reasons Why Analog Appeals in Cultural Activities

1. Feels more authentic

2. More focus on the activity

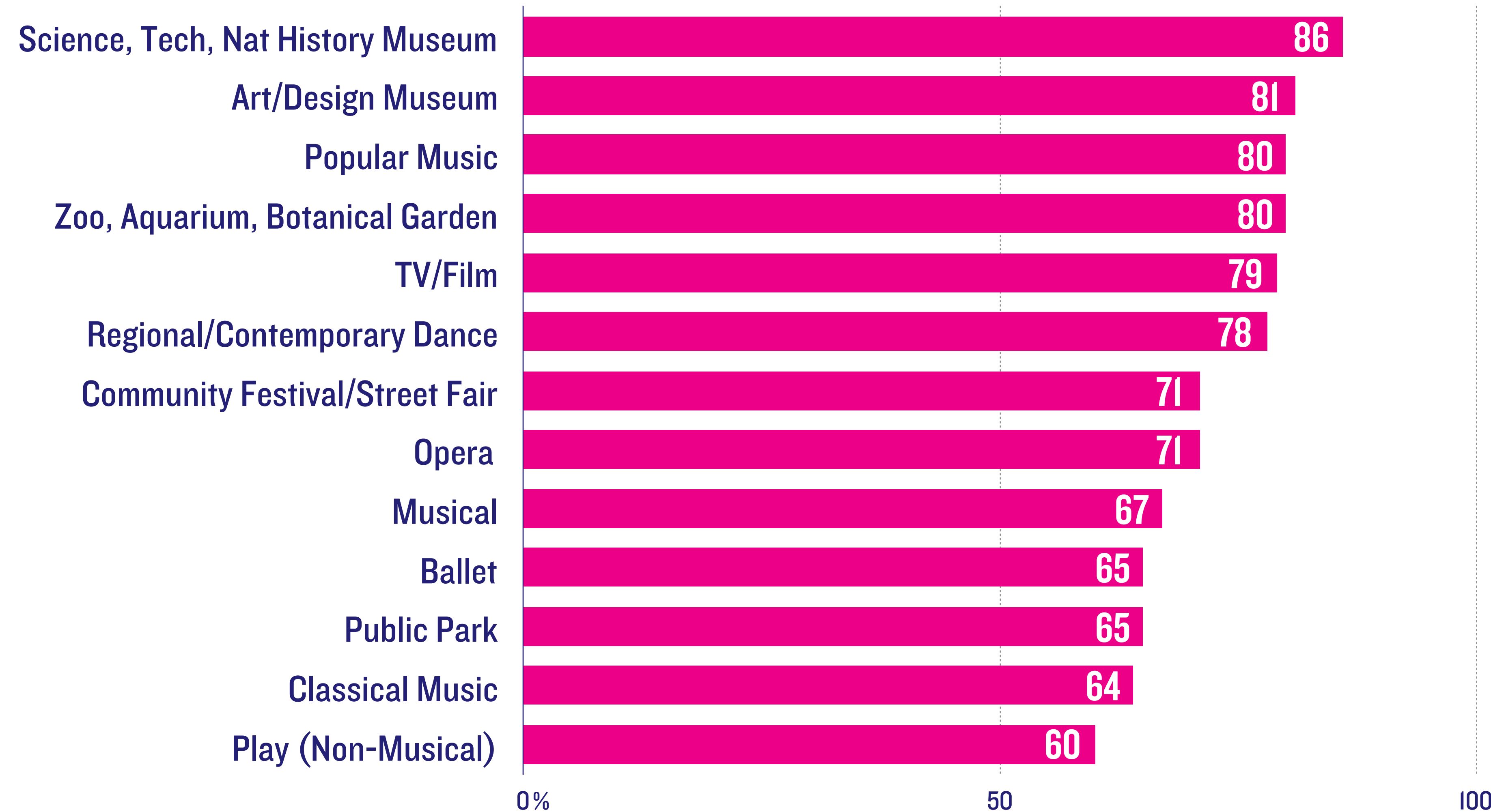
3. Less complicated


4. Better connection to content



Overall, however, audiences are very open to future digital experiences across cultural activities.

Desire for Digital Experiences in Cultural Activities





**The future of digital lies in identifying
how it can deepen the cultural
experience in ways nothing else can.**



**When exploring a new digital strategy,
start by asking:**

-
- Does it enrich or distract?
 - Will it simplify the experience, or add unnecessary complexity?
 - Does it feel authentic?

The Digital Dilemma

Spotlight Stats



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

Parents are

52%

more likely to say wearable technology would enhance a cultural experience.

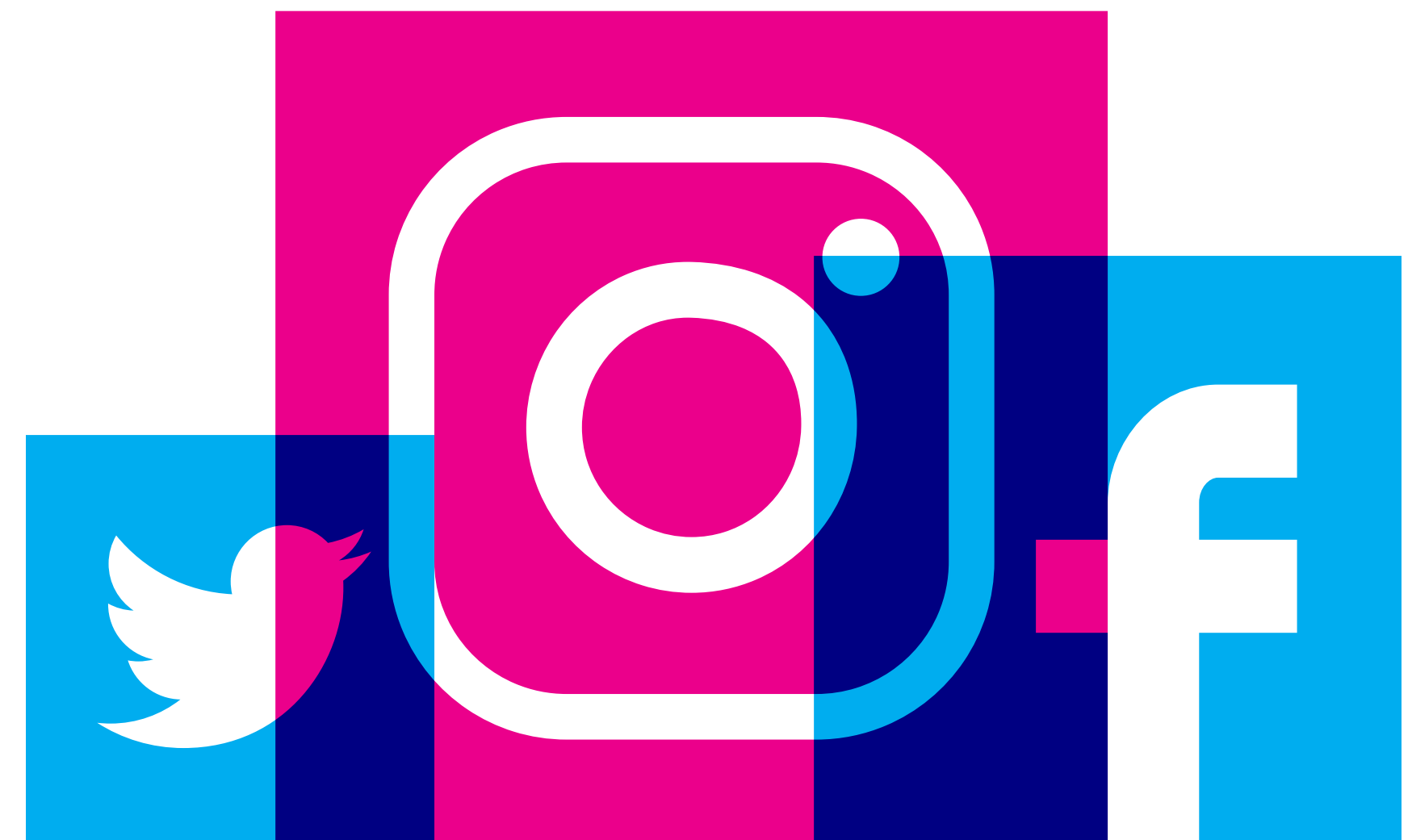


Social media can have a broader impact

People of color are


31%

more likely to say
integrating social
media would enhance
the experience.



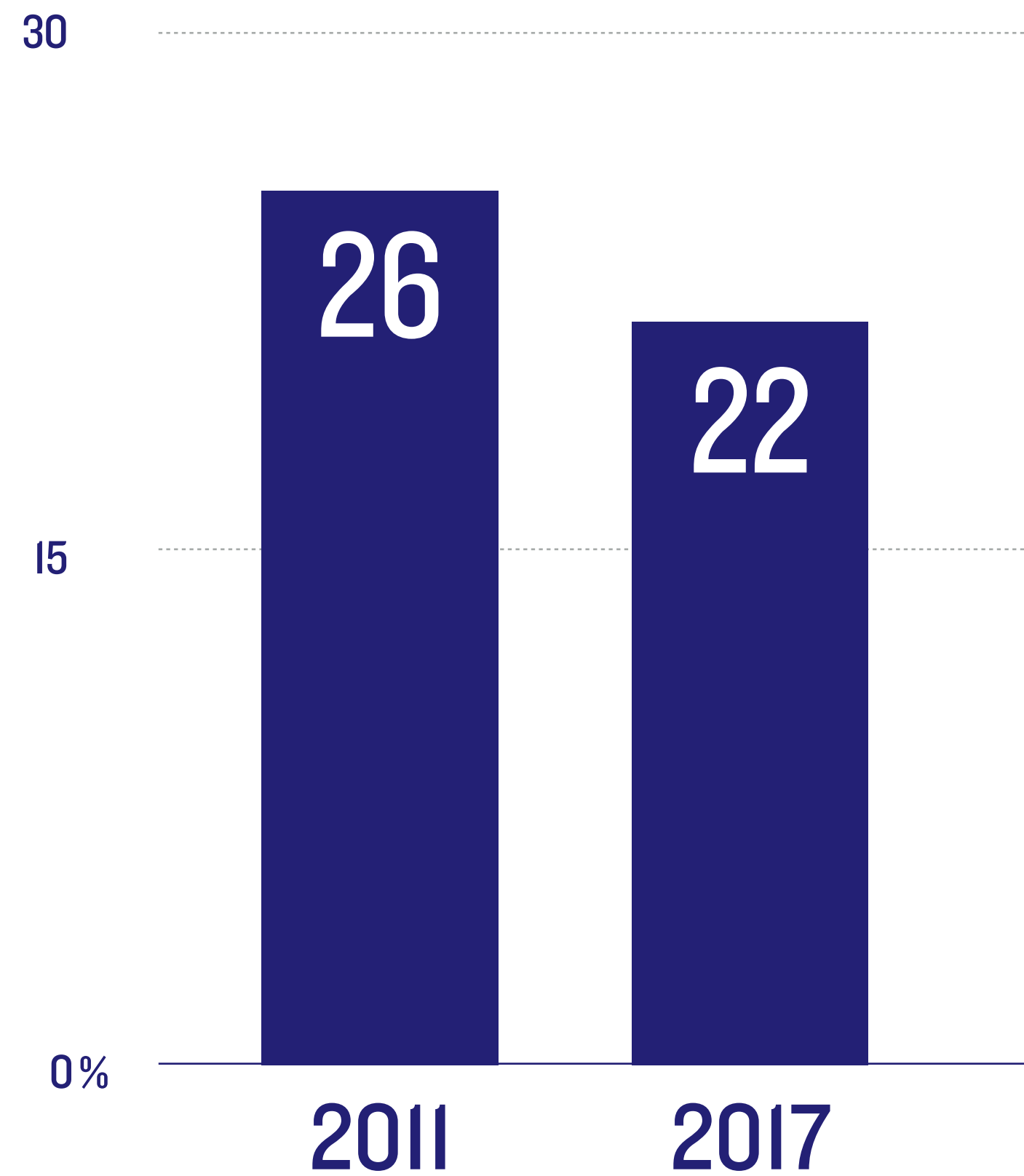
6

The Loyalty Revolution

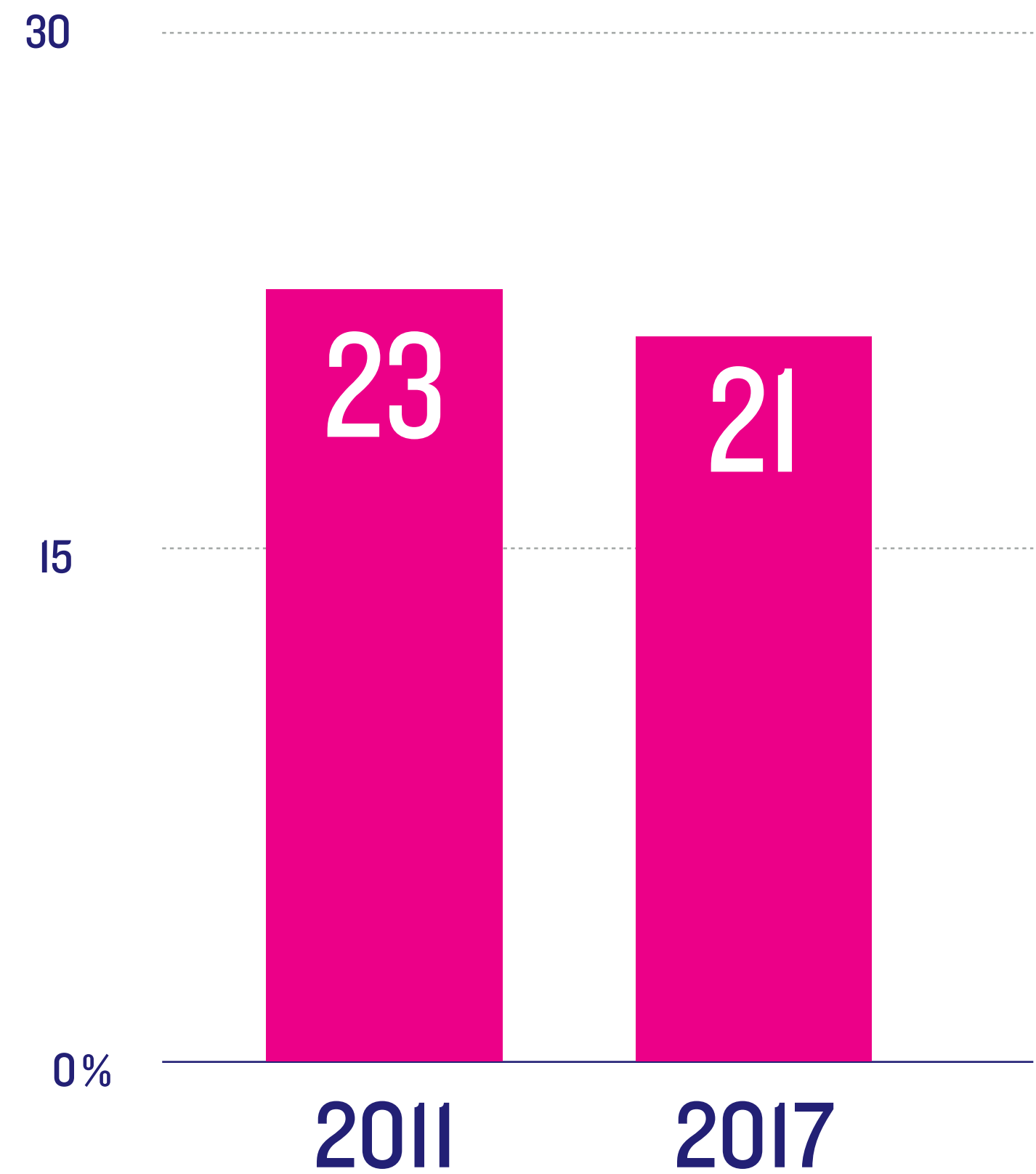


Since 2011, there has been a flat or downward trend in memberships and subscriptions — a “cultural promiscuity” phenomenon that continues in 2017.

Visual Arts Memberships



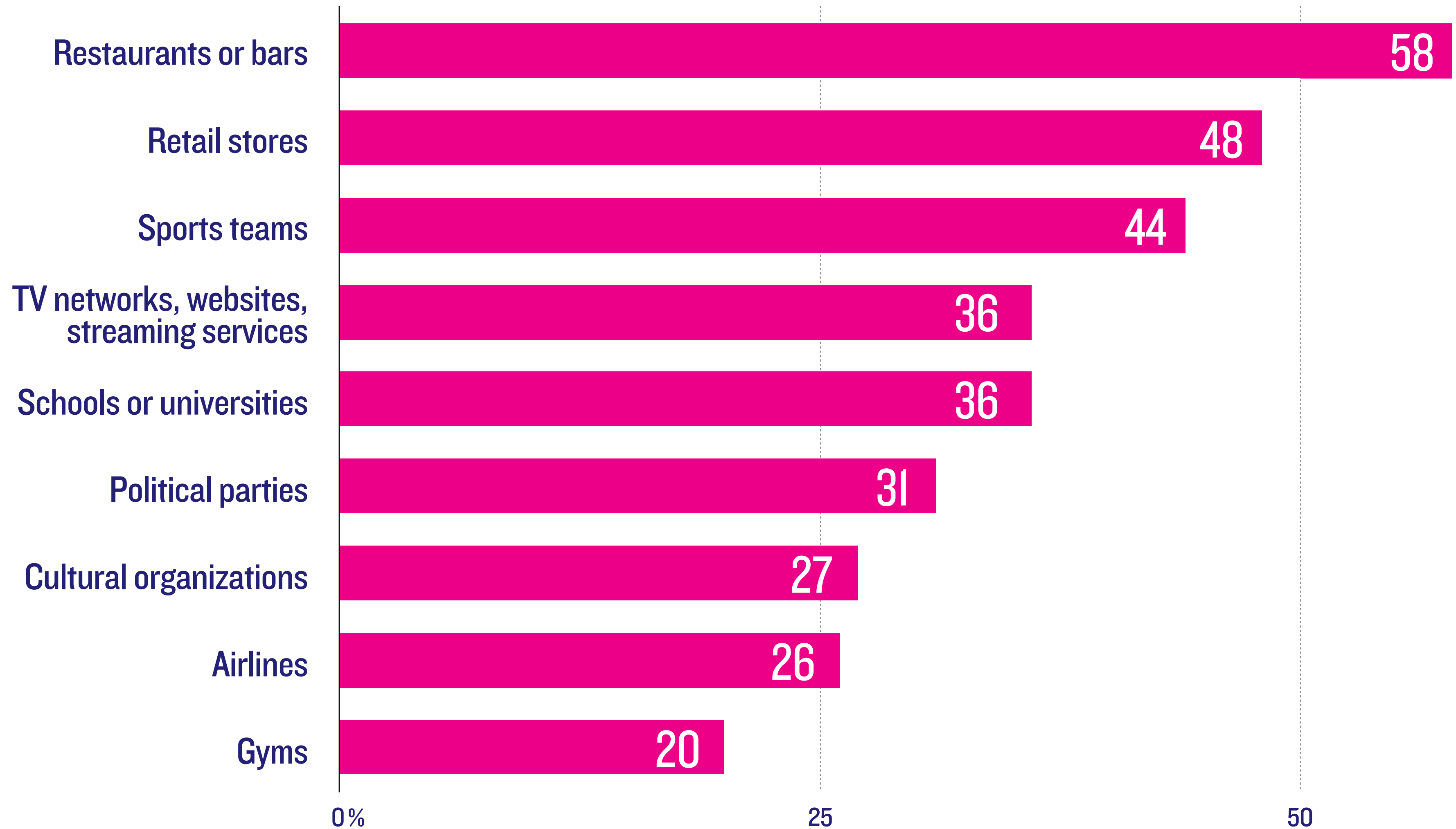
Performing Arts Subscriptions



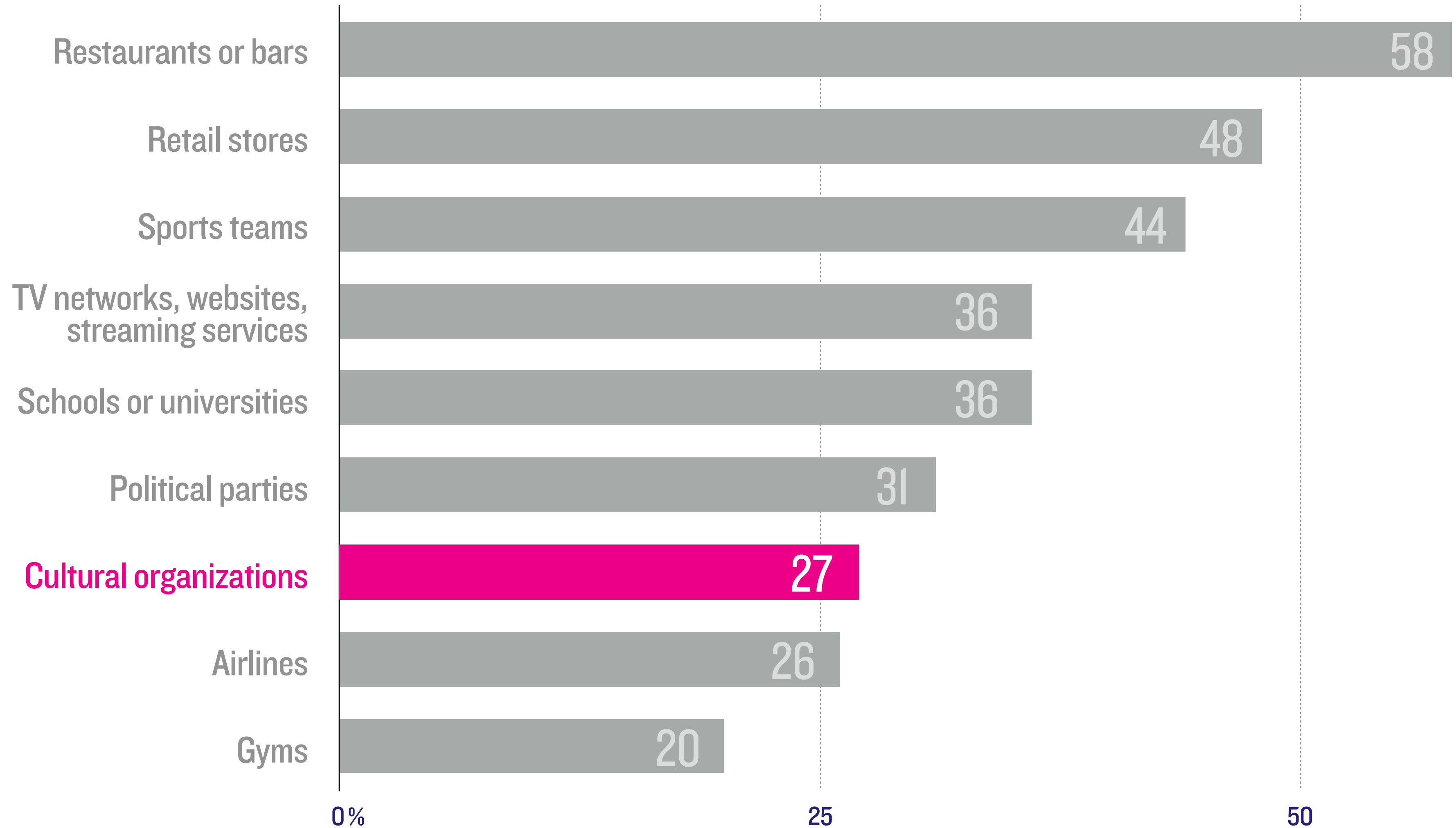


**This doesn't mean that people
aren't loyal.**

Audience Loyalties



Audience Loyalties

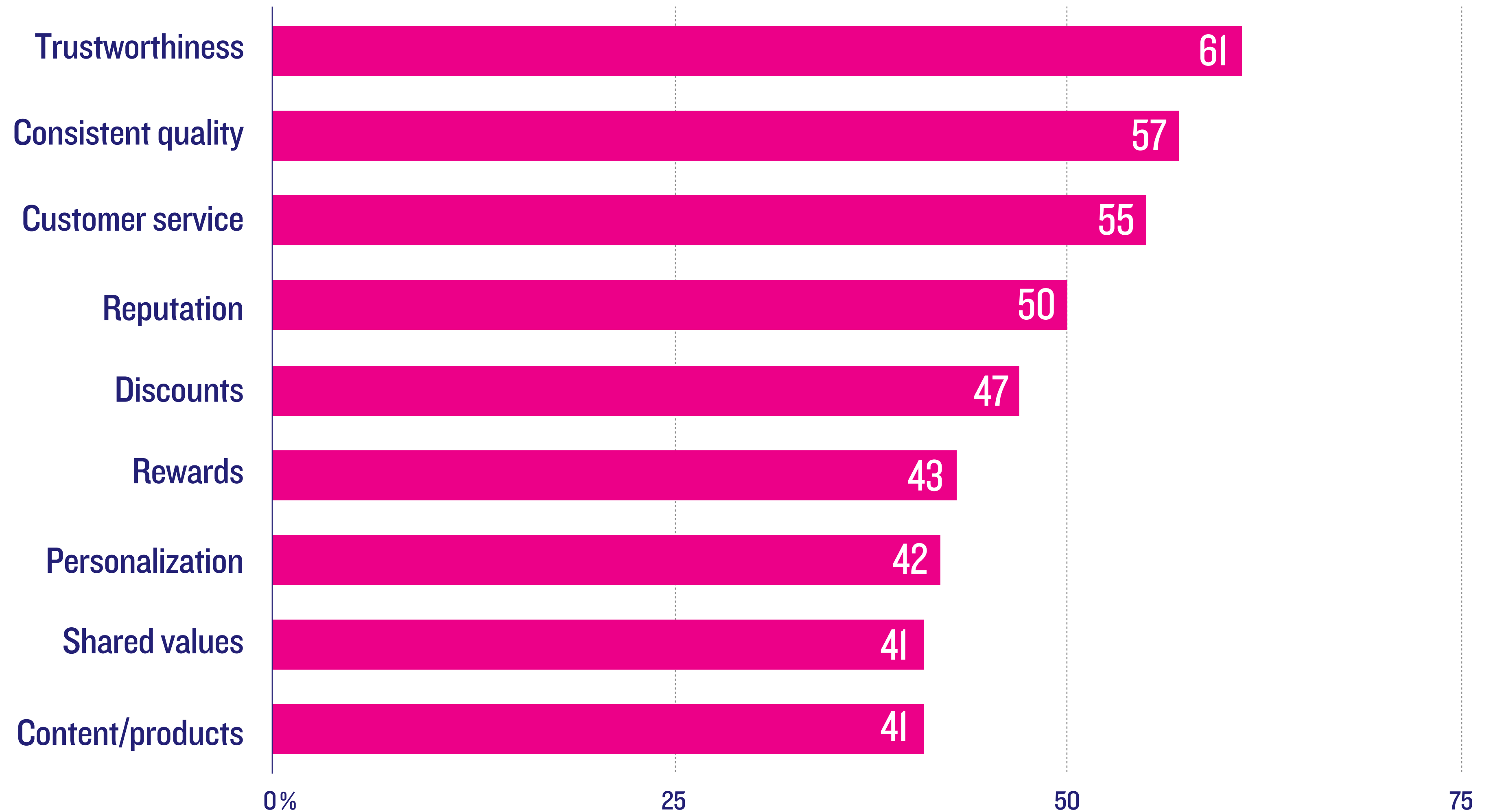


Outside of culture, audiences view loyalty as a personal relationship.

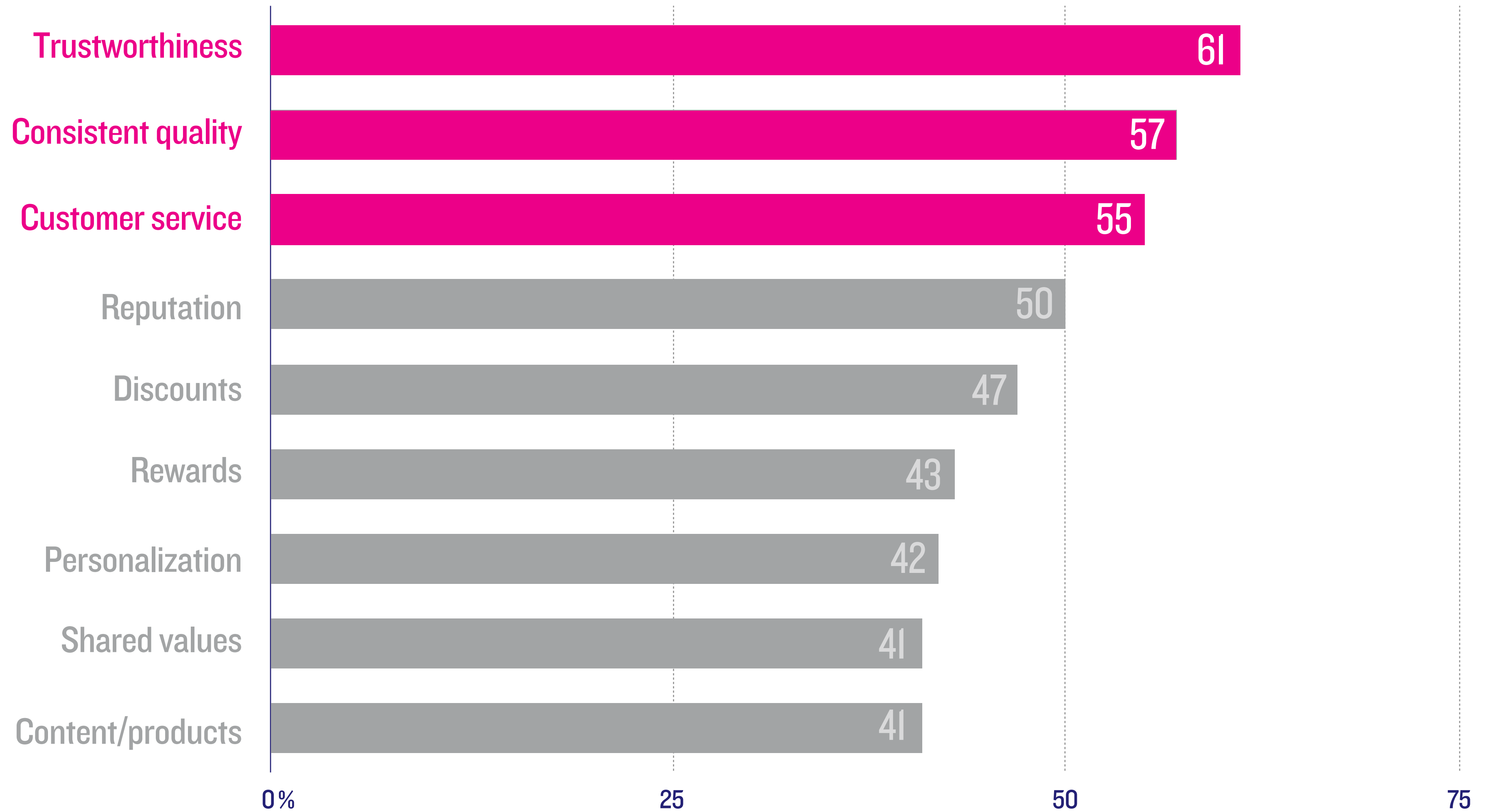
Their ideal partner is:

- trustworthy**
- consistent**
- kind**

Motivators for Loyalty



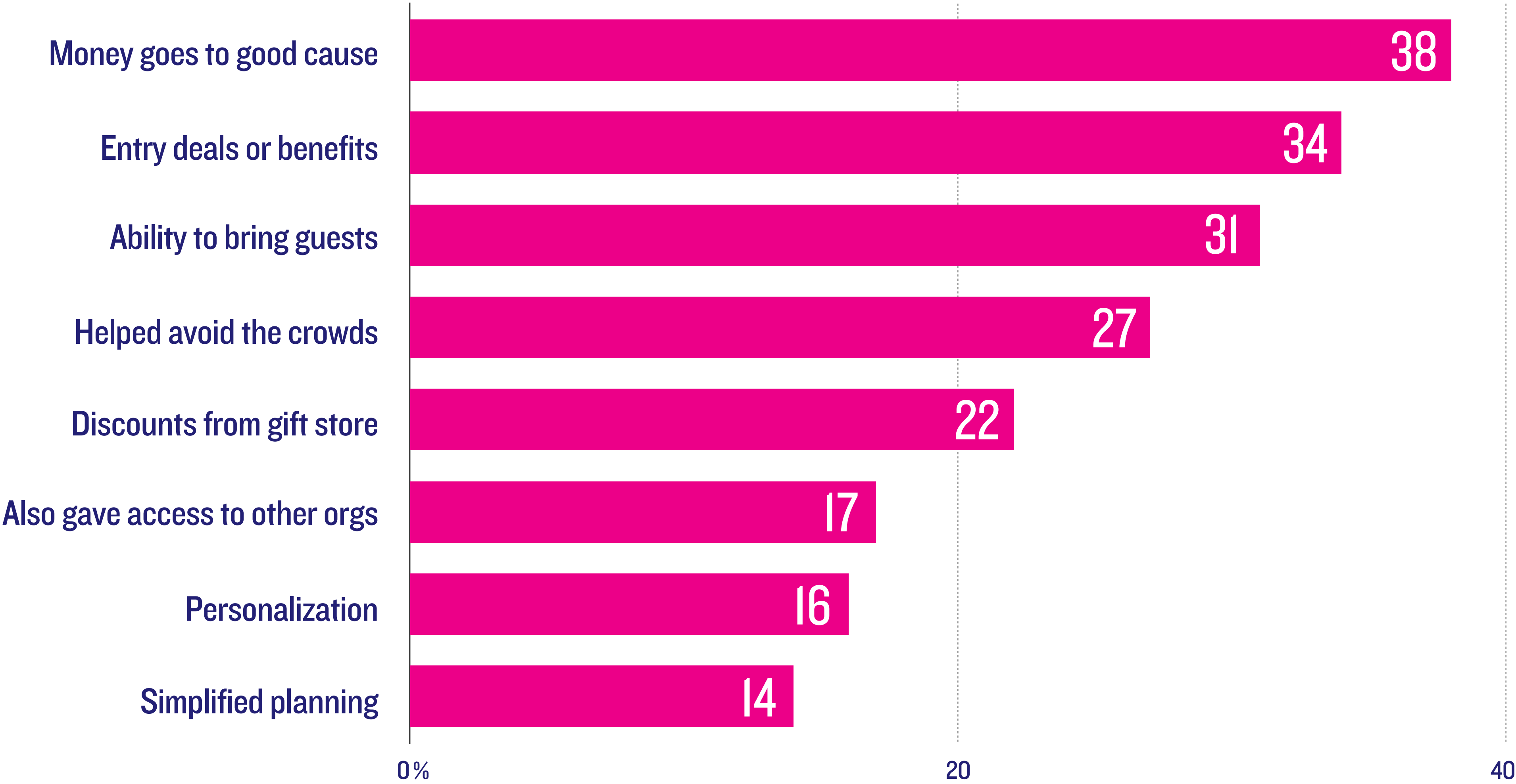
Motivators for Loyalty



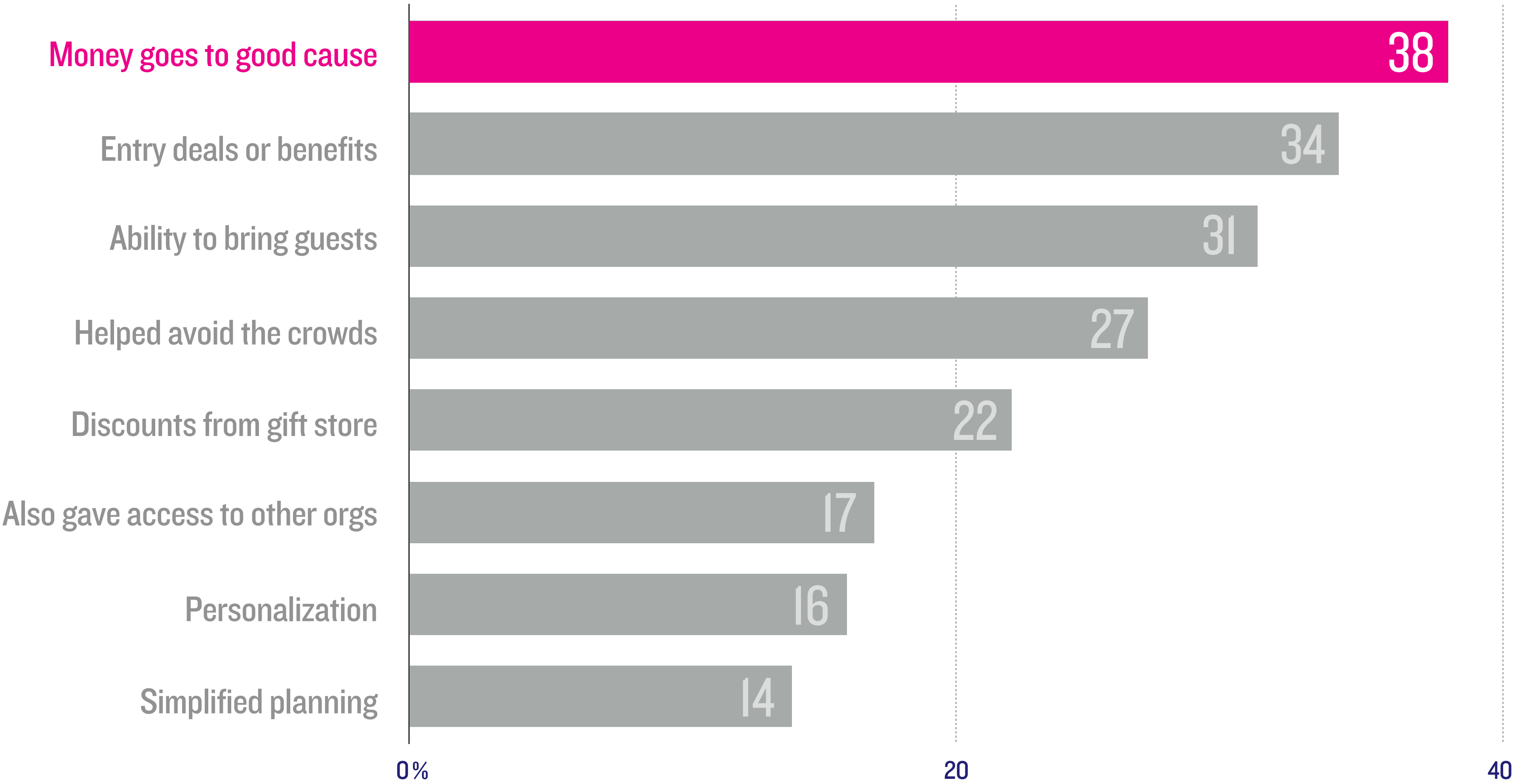


Importantly, audiences value not only how cultural organizations treat them, but also how these organizations impact the rest of the world.

Motivators for Joining a Loyalty Program



Motivators for Joining a Loyalty Program



This is a tipping point.

**New models of loyalty must
forge meaningful, reciprocal, and
long-lasting relationships.**

The Loyalty Revolution

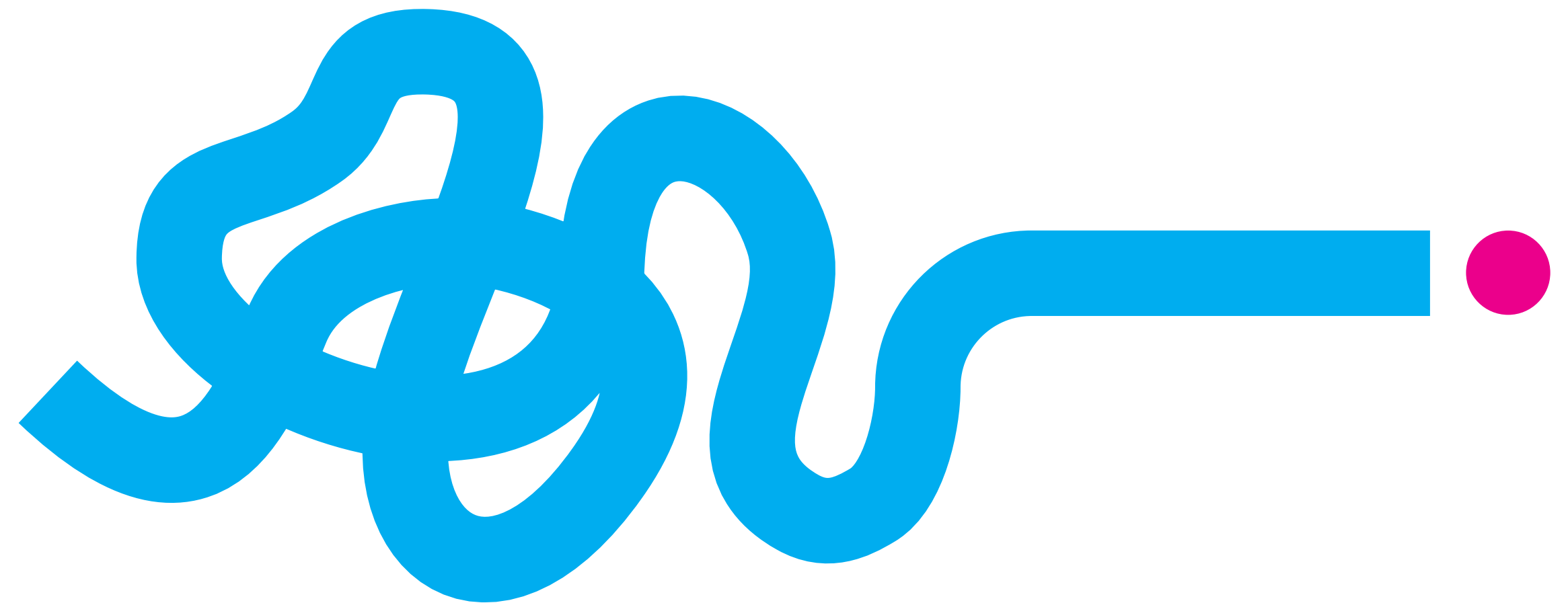
Spotlight Stats



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

Parents are

21%



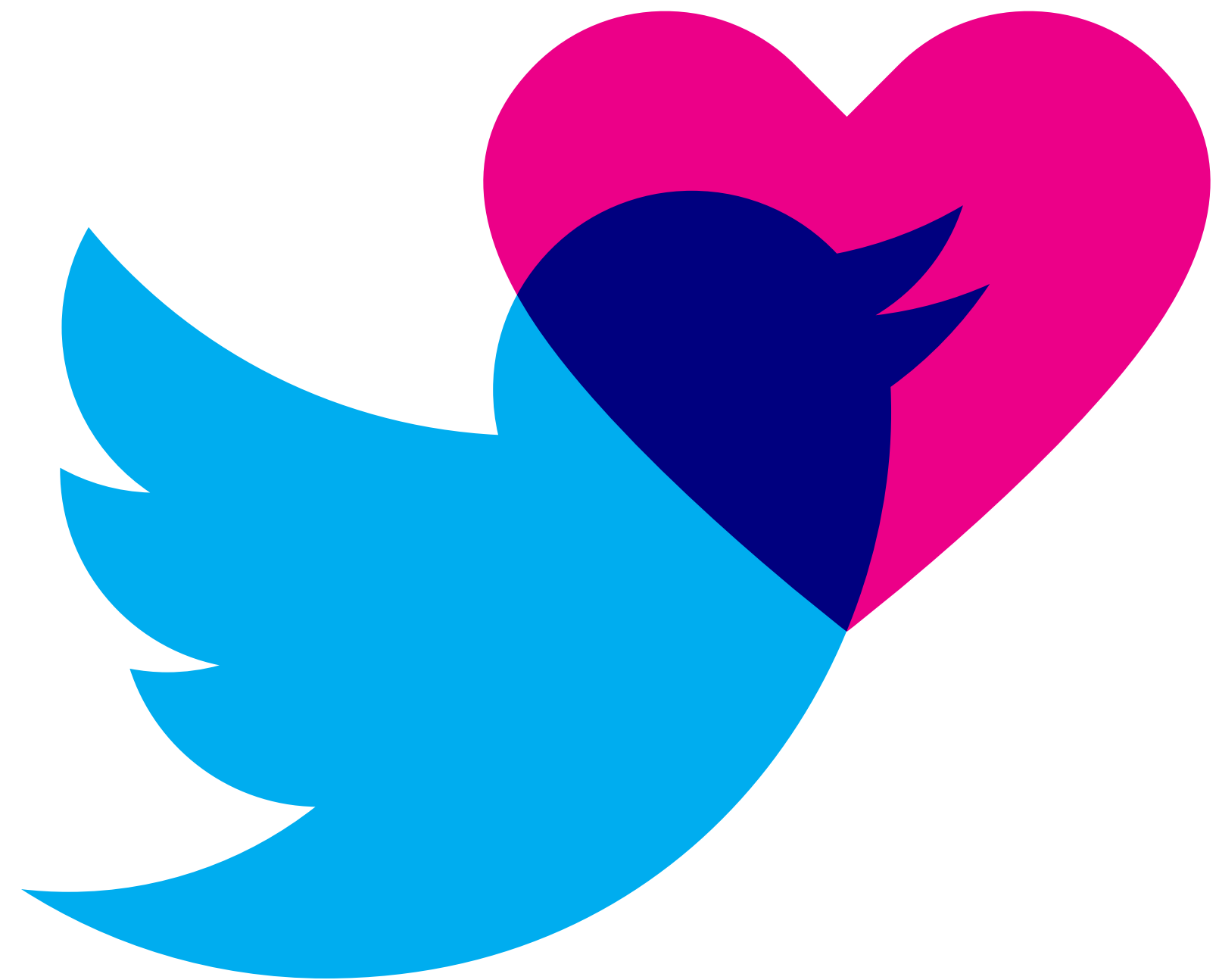
more likely to join a
loyalty program that
simplifies their planning.

**For younger generations,
to tweet is to care.**

Over


1/3 of

younger generations feel
that engaging on social
media is an act of loyalty.



7

The Case for Support

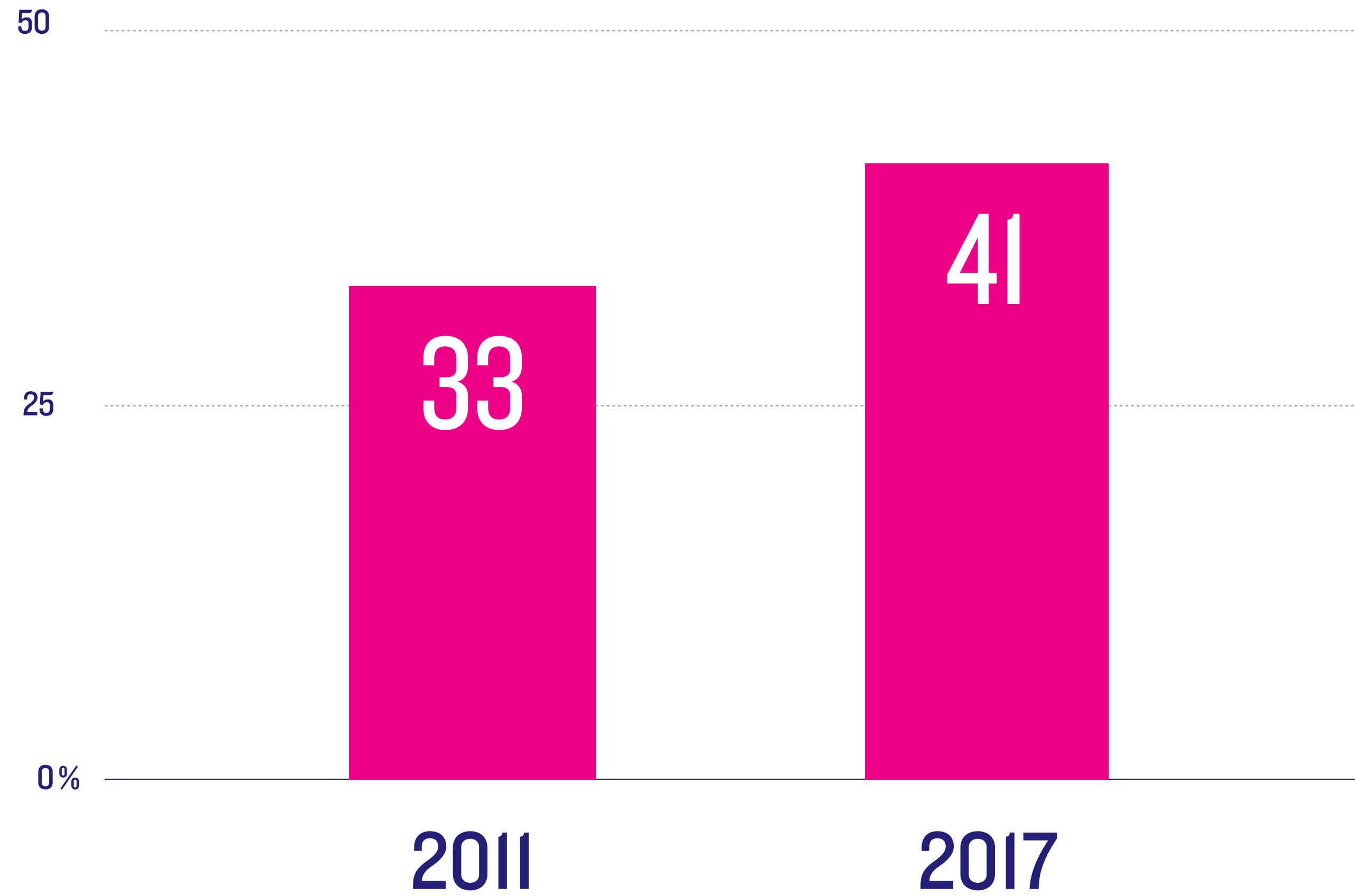


Audiences regularly experience many forms of culture — film, music, festivals, and more — that do not solicit or depend on donations to exist.



**And yet, audiences still give consistently
to organizations that do.**

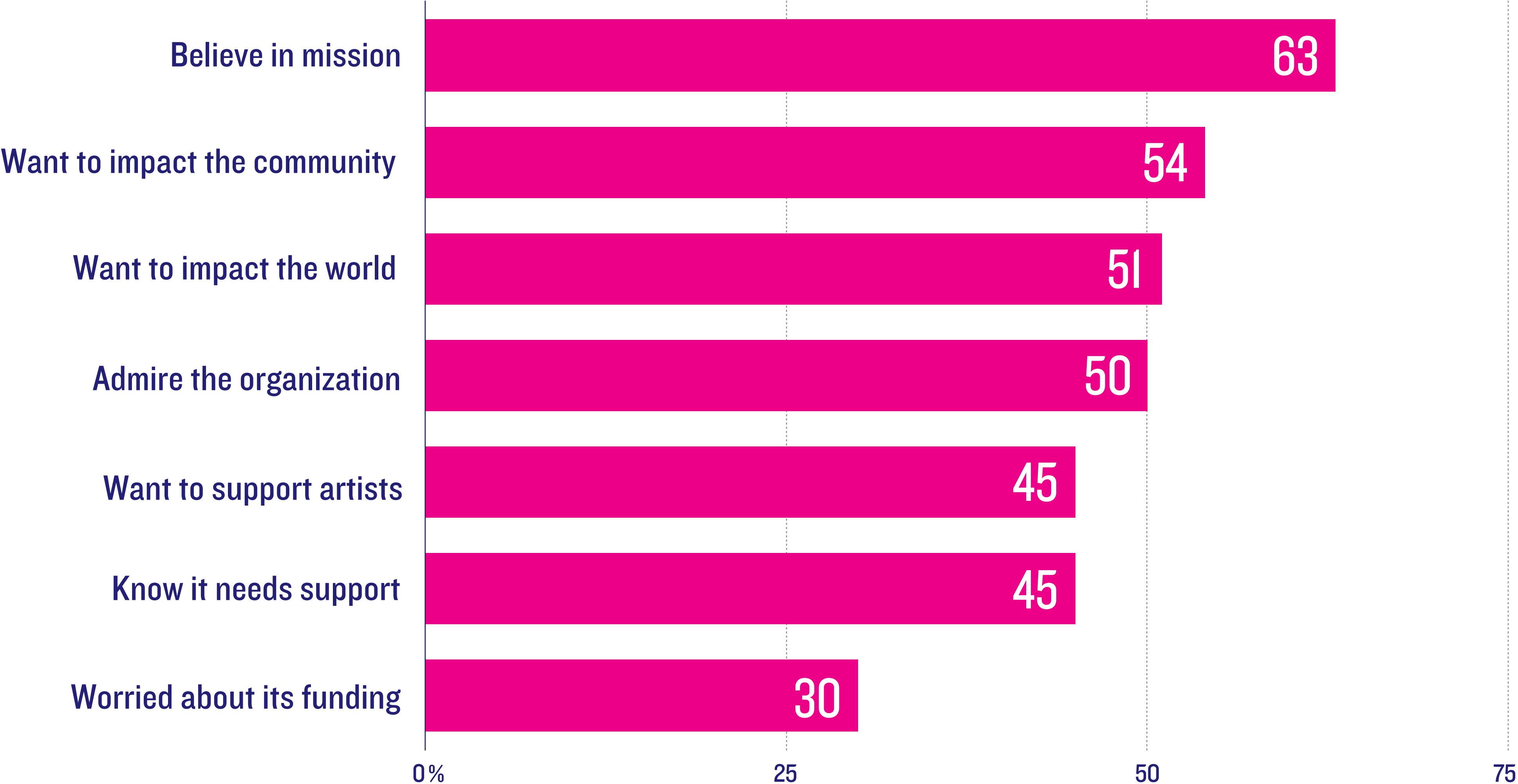
Plans to Donate to Culture



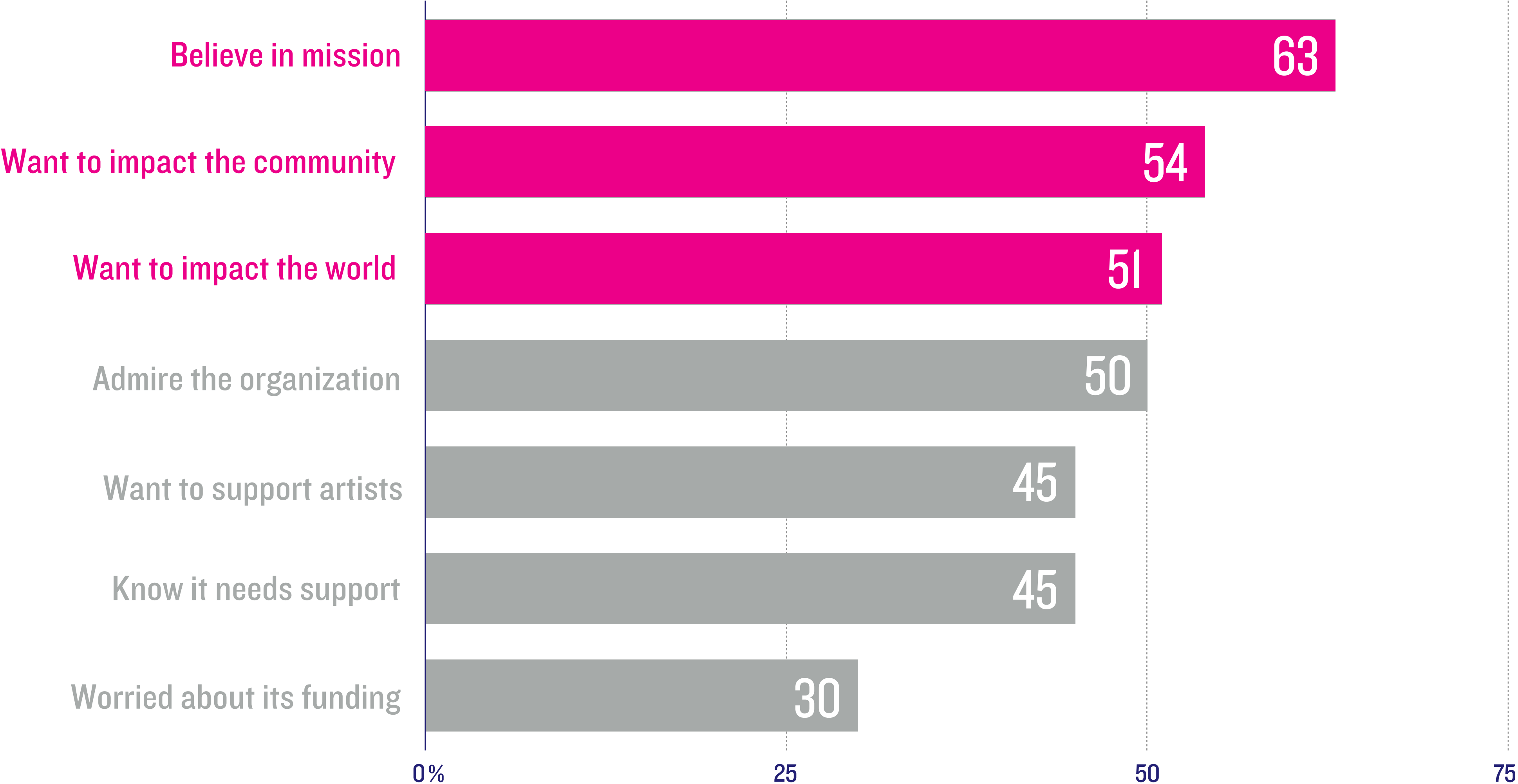
**The top reasons for donating to culture
all relate to one thing:**


Social impact.

Motivators for Donating to Culture



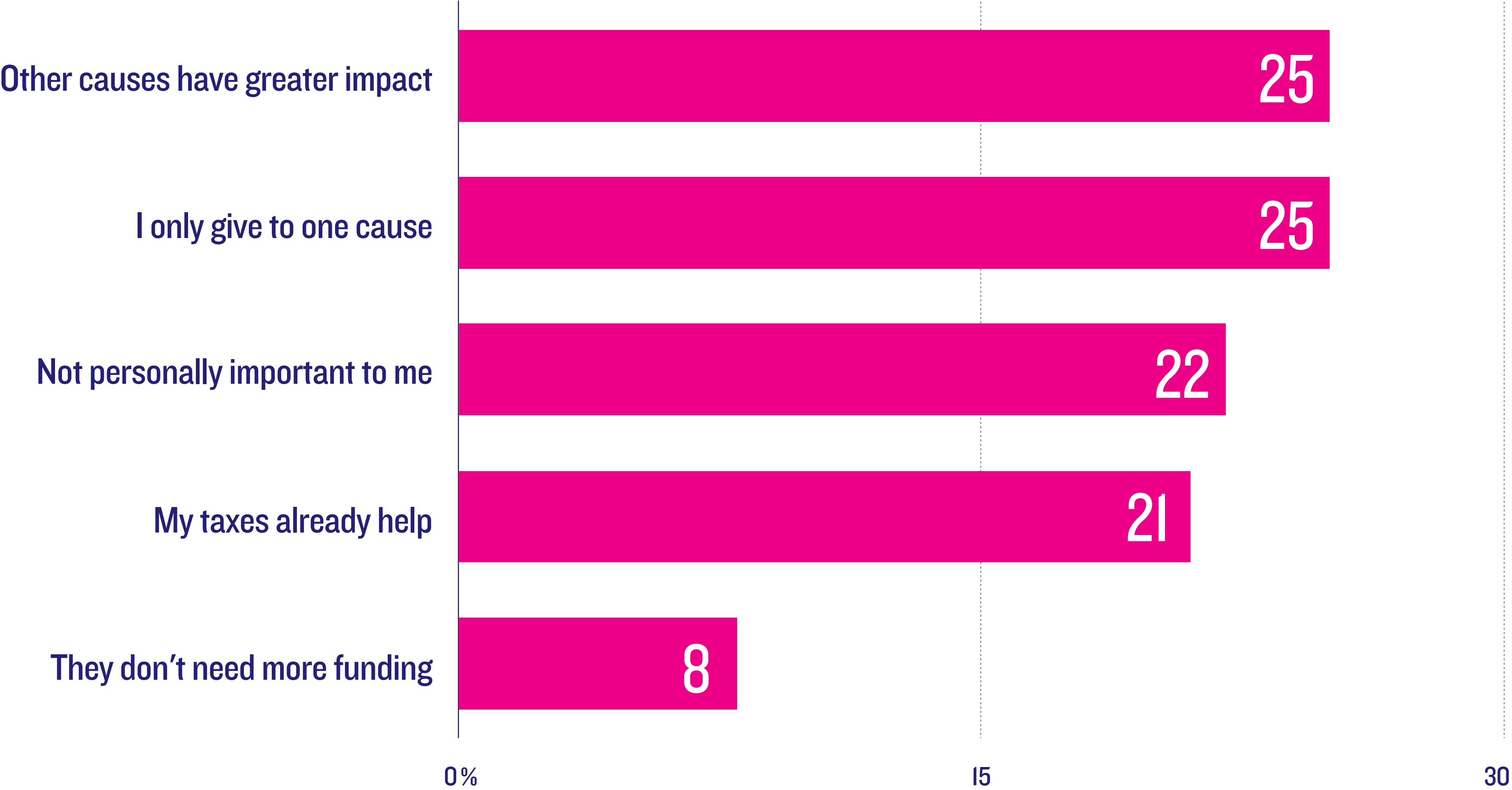
Motivators for Donating to Culture



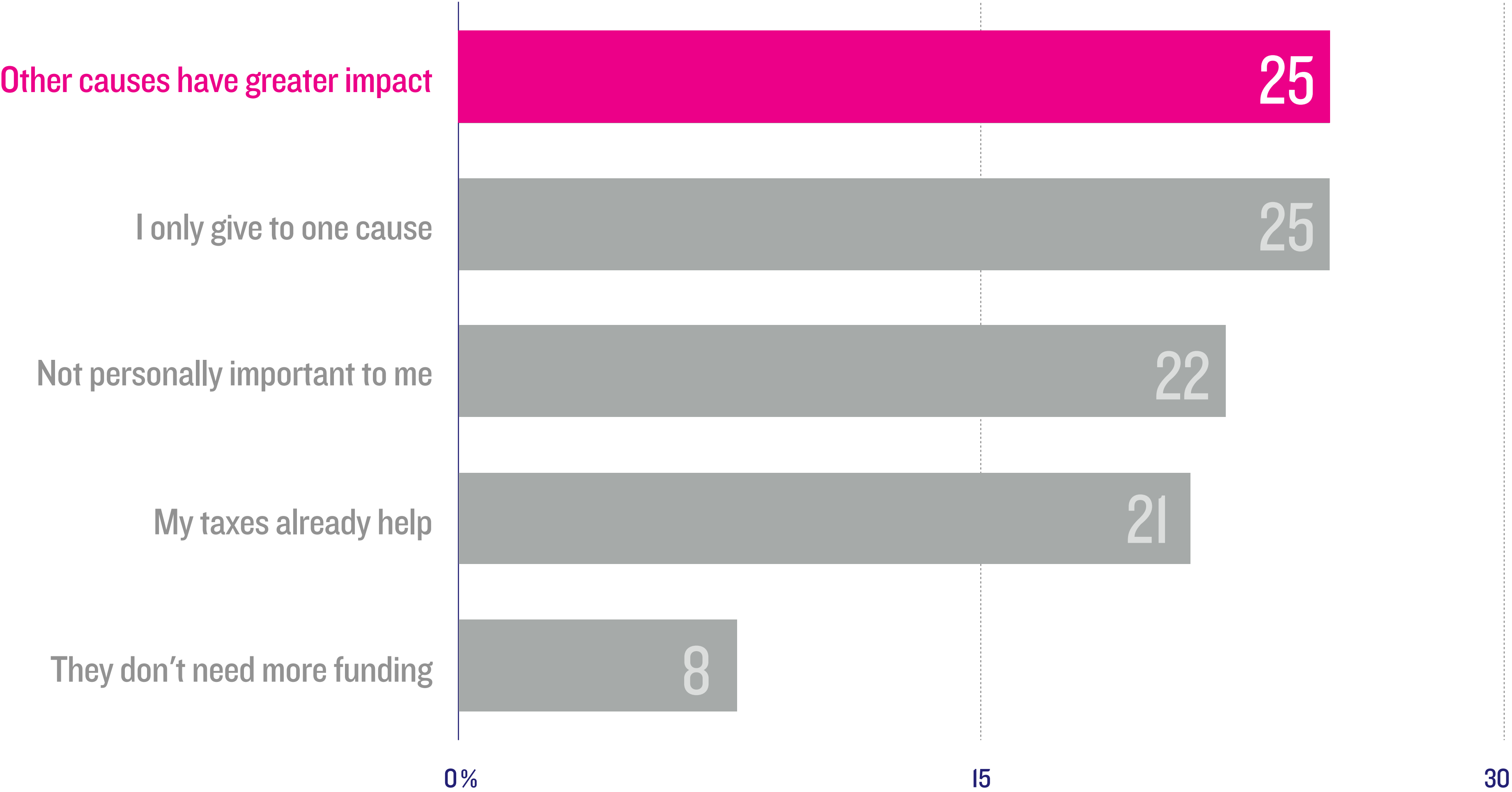



Audiences prefer to give to organizations that they believe have the greatest impact — but culture often doesn't fit the bill.

Reasons for Not Donating to Culture



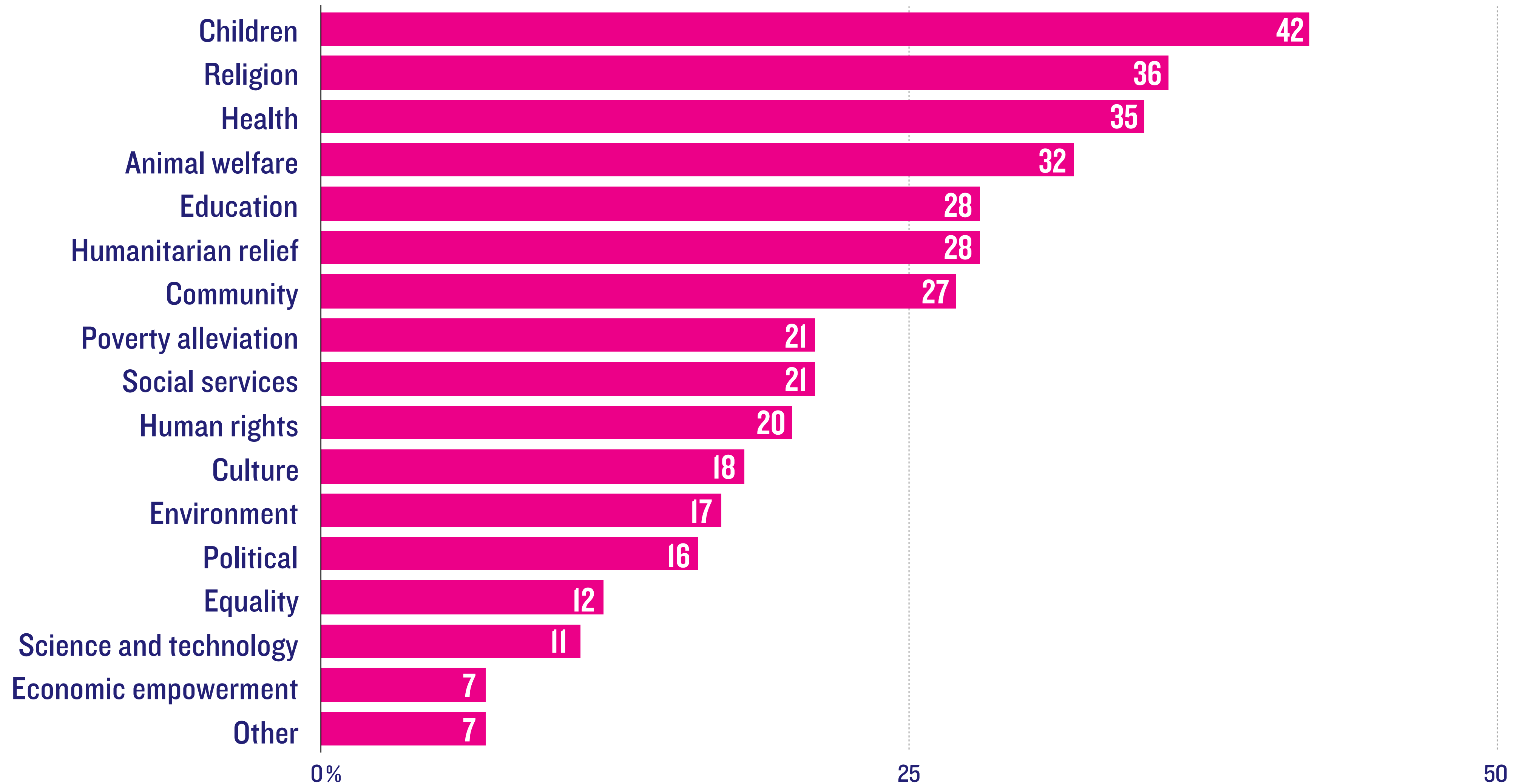
Reasons for Not Donating to Culture






Audiences want to see their money translate to clear, measurable, and tangible impact — aligning strongly with causes such as health, education, and humanitarian relief.

Philanthropic Causes





With social impact as the main driver, cultural organizations need to work harder to measure and articulate their distinct impact, and prove how they are essential to people's lives and livelihood.



To create the “new philanthropy,” the answer is not to shift the approach, but to rethink it from every angle:

-
- Establish a “dialogue-based relationship”
 - Focus on results and impact
 - Look beyond the field for effective models
 - Understand generational differences

The Case For Support

Spotlight Stats

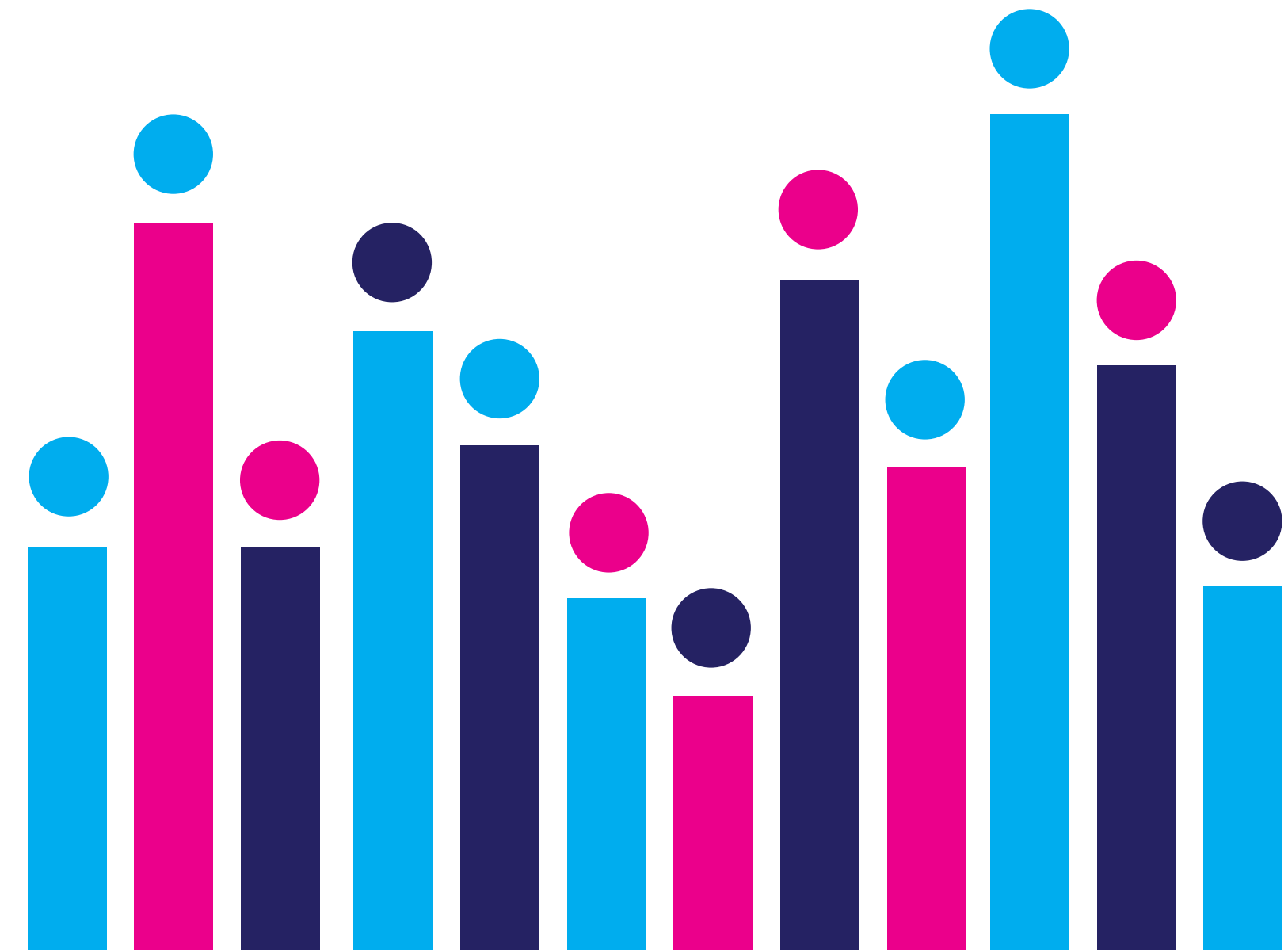


For Pre-Wars, community comes first.

Pre-Wars are

55%

more likely to give to
community organizations.



Culture and social change are intertwined.

People of color are

71%

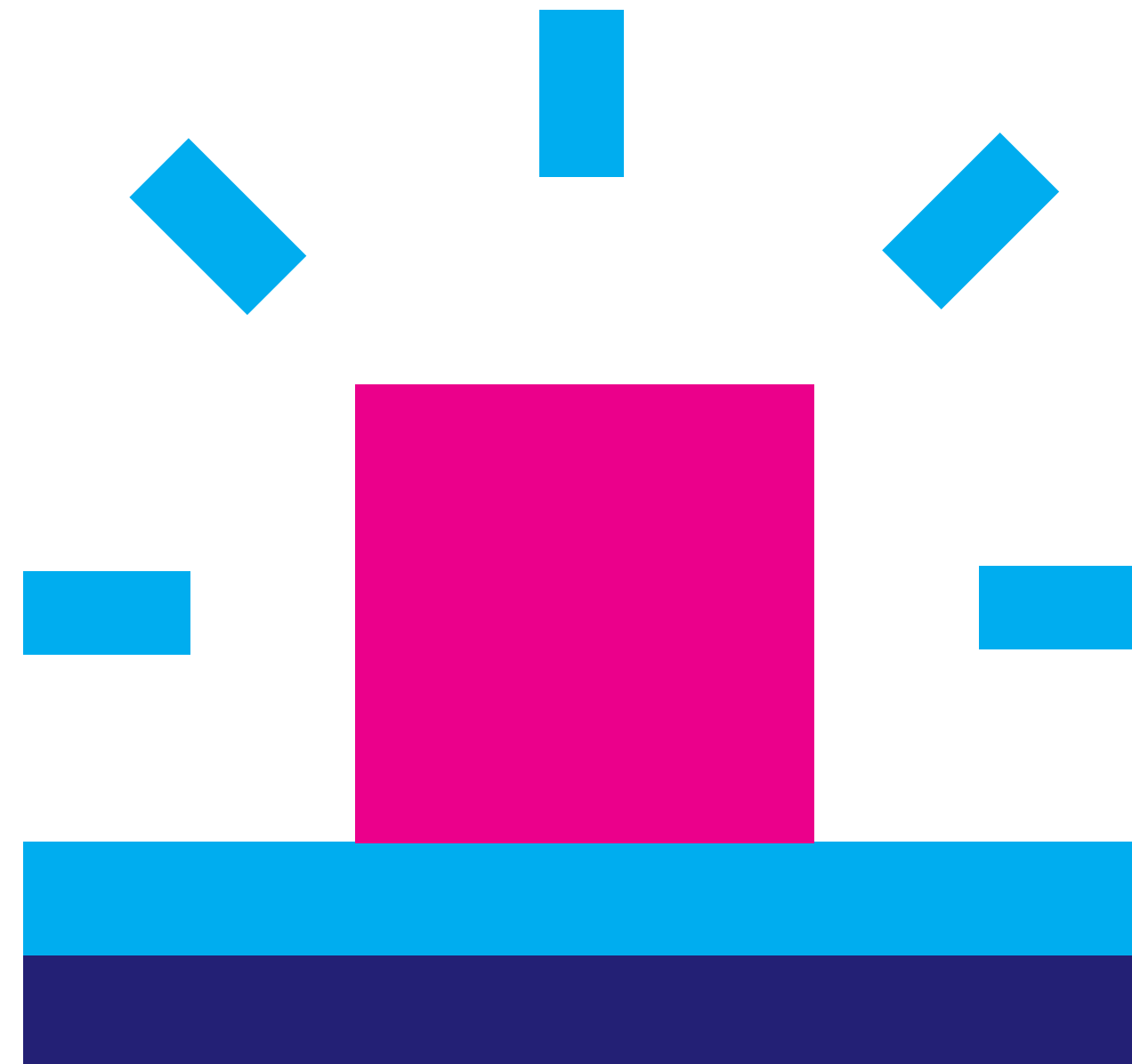
more likely to donate to civil and human rights organizations.



Sponsorship of culture is a business win.

58%

say they feel good about doing business with corporations that support culture.



00

Conclusion: Five Key Takeaways

#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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