CULTURE TRACK '14

SUPPORTING DATA

LaPlaca
Cohen

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INTRODUCTION

ABOUT CULTURE TRACK

Culture Track is the largest tracking study focused exclusively on the ever-changing attitudes and behaviors of U.S. cultural consumers, as well as the trends in attendance and the motivators and barriers that affect participation. It has been fielded six times since 2001.

Culture Track 2014 is the product of over a decade of LaPlaca Cohen's research and dedication to producing a current, highly-actionable resource for the leading cultural institutions across the nation.

The 2014 edition of Culture Track arrives at a pivotal moment for cultural organizations nationwide. Audience behaviors and expectations are changing rapidly, driven by ever-multiplying and diversifying options for spending leisure time, and by technology developments that are fundamentally altering the way we interface with our world. The implications for cultural institutions are significant and, without close study, difficult to determine.

ABOUT THIS DOCUMENT

This document provides the comprehensive research conducted by Campbell Rinker, which served as the supporting data for Culture Track 2014. Selected findings from the comprehensive research are noted throughout.

The Top-Line Presentation by LaPlaca Cohen, which provides a more focused exploration of key insights from the data, can be downloaded at LaPlacaCohen.com/culturetrack.

Twitter: @LaPlacaCohen #culturetrack

METHODOLOGY

LaPlaca Cohen worked in partnership with research firm Campbell Rinker to field Culture Track 2014. The study was conducted using a nationwide online survey with 4,026 respondents, representing all 50 states. Respondents were U.S. residents ages 18 or over who were double-confirmed for interest in cultural events and attendance to at least one cultural activity in the past year. The study defines cultural participation as attendance to a specific range of cultural activities, such as:

MUSEUM / ART EXHIBITIONS	OPERA
DRAMATIC THEATER	ZOOS
MUSICAL THEATER	BOTANICAL GARDENS
CLASSICAL MUSIC	AQUARIUMS
FILM FESTIVALS	SCIENCE MUSEUMS
CLASSICAL DANCE / BALLET	HISTORY MUSEUMS
MODERN DANCE	

Culture Track 2014 has a ±1.6% margin of error at the 95% confidence level.

Throughout the report, there are instances where responses are broken out by generational differences.

The age ranges for the generations are defined as:

MILLENNIALS: 18 TO 29

GEN X: 30 TO 49

BOOMERS: 50 TO 69

PRE-WAR: 70+

1. PERCEPTIONS OF CULTURAL ORGANIZATIONS

1. PERCEPTIONS OF CULTURAL ORGANIZATIONS

1.1 ROLE OF CULTURAL ORGANIZATIONS: OVERALL TRENDS

Question: In your opinion, what are the roles of cultural organizations and activities?

Role	2011 (n=4005)	2014 (n=4026)
Educate people about other cultures or perspectives		80
Entertain/provide enjoyment	74	80
Foster appreciation of arts and culture	63	76
Celebration and preservation of art forms (visual or performance)	69	71
Conservation and caretaking of art		59
Encourage self-discovery and reflection		53
Contribute to the greater good of society		53
Serve as a meeting place for like-minded individuals		43
Contribute to the local economy		41

Selected Findings:

- Respondents indicate that the main roles of cultural organizations are to educate, entertain, foster appreciation, and preserve the arts.

- To a much lesser degree, four to five respondents out of ten indicate that the roles of arts organizations include encouraging self-discovery, contributing to the greater good of society or the local economy, and serving as a meeting place for like-minded individuals.

- Compared to 2011 respondents, 2014 respondents are more likely to indicate that the role of arts organizations is to foster appreciation of the arts (76% in 2014 vs. 63% in 2011). 2014 respondents are also more likely to indicate that providing entertainment is one of the roles of arts organizations (80% in 2014 vs. 74% in 2011).

Note: In instances where 2011 data is not shown, those options were newly introduced in 2014.

1. PERCEPTIONS OF CULTURAL ORGANIZATIONS

1.2 ROLE OF CULTURAL ORGANIZATIONS: BY GENERATION

Question: In your opinion, what are the roles of cultural organizations and activities?

Legend:
- Millennials (n=680)
- Gen X (n=1203)
- Boomers (n=1803)
- Pre-War (n=340)

Category	Millennials	Gen X	Boomers	Pre-War
Foster appreciation of arts and culture	74	72	78	83
Conservation and caretaking of art	56	57	60	65
Educate people about other cultures or perspectives	81	82	79	72
Serve as a meeting place for like-minded individuals	51	43	41	39
Encourage self-discovery and reflection	60	54	52	47
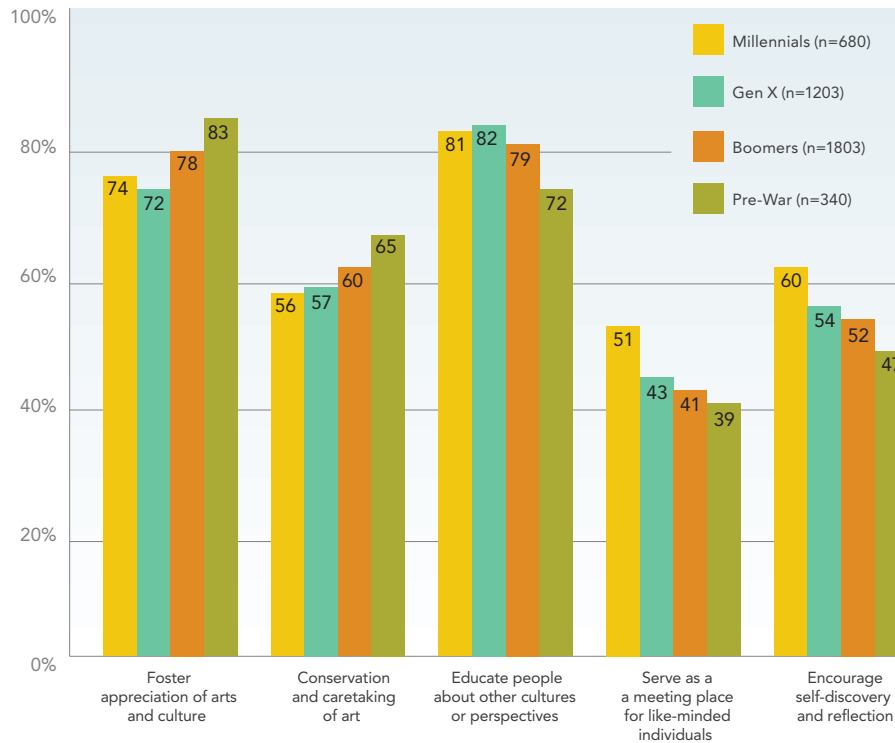
Selected Findings:

• Older generations (Boomers, Pre-War) are more inclined to choose traditional roles for cultural organizations, such as fostering appreciation of the arts and conservation and caretaking.

• Younger generations (Millennials and Gen X) are more likely to see cultural organizations as places where they can meet like-minded individuals, engage in self-discovery, and learn about other cultures or perspectives.

Note: Only the responses with significant generational differences are shown.

2. PARTICIPATION PATTERNS

2. PARTICIPATION PATTERNS

2.1 PERCENT OF RESPONDENTS WHO ATTEND
AT LEAST ONCE PER YEAR

Question: Which of the following activities do you participate in at least once per year?
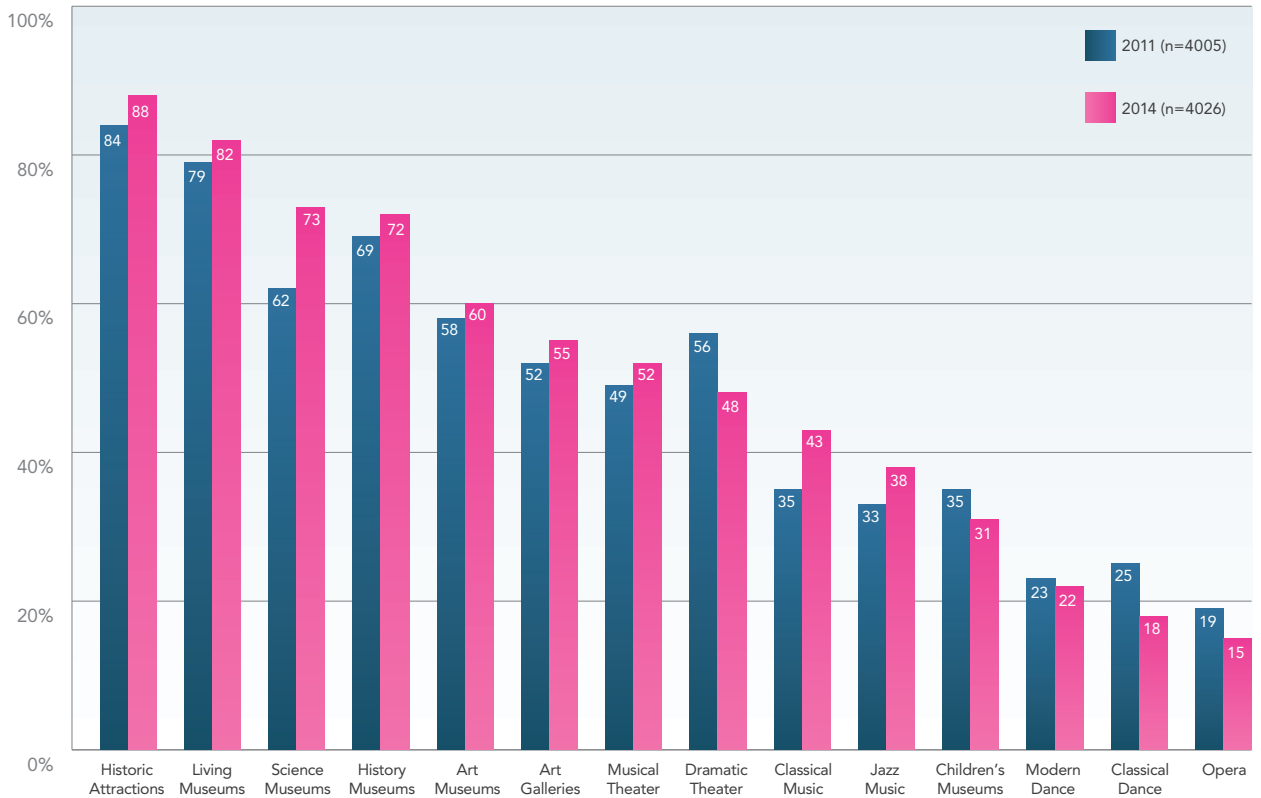
	2011 (n=4005)	2014 (n=4026)
Historic Attractions	84	88
Living Museums	79	82
Science Museums	62	73
History Museums	69	72
Art Museums	58	60
Art Galleries	52	55
Musical Theater	49	52
Dramatic Theater	56	48
Classical Music	35	43
Jazz Music	33	38
Children's Museums	35	31
Modern Dance	23	22
Classical Dance	25	18
Opera	19	15

2. PARTICIPATION PATTERNS

2.1 PERCENT OF RESPONDENTS WHO ATTEND
AT LEAST ONCE PER YEAR (CONT'D)

Selected Findings:

- Since 2011, the percentage of individuals who participate in cultural activities at least once per year has marginally increased, with a few exceptions.

- One possible reason for the dip in interest for children's museums is that fewer culturally-engaged participants in the 2014 edition have young children (25% vs. 30% in 2011); taking this into account, the trend is actually stable.

- Interestingly, visitation to science museums increased despite the fact that fewer of the 2014 respondents have children, which could indicate that those museums are doing a better job of appealing to visitors of all ages.

- The increases for participation in jazz and classical music might be attributed to broader definitions of what constitutes those genres, as well as increased opportunities to "participate" at home (i.e. streaming, radio).

- Though the economy has had a diminishing impact on overall participation patterns (see page 12), dramatic theater, classical dance, and opera may still be seeing decline in participation due to cost considerations. Additionally, the closure of many smaller opera companies across the U.S. may be a contributing factor.

2. PARTICIPATION PATTERNS

2.2 NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH: OVERALL TRENDS

Question: In a typical month, how many cultural events do you attend?

Year	None	1 to 2	3+ Events
2014	30	55	15
2011	27	51	22
2007	27	42	31
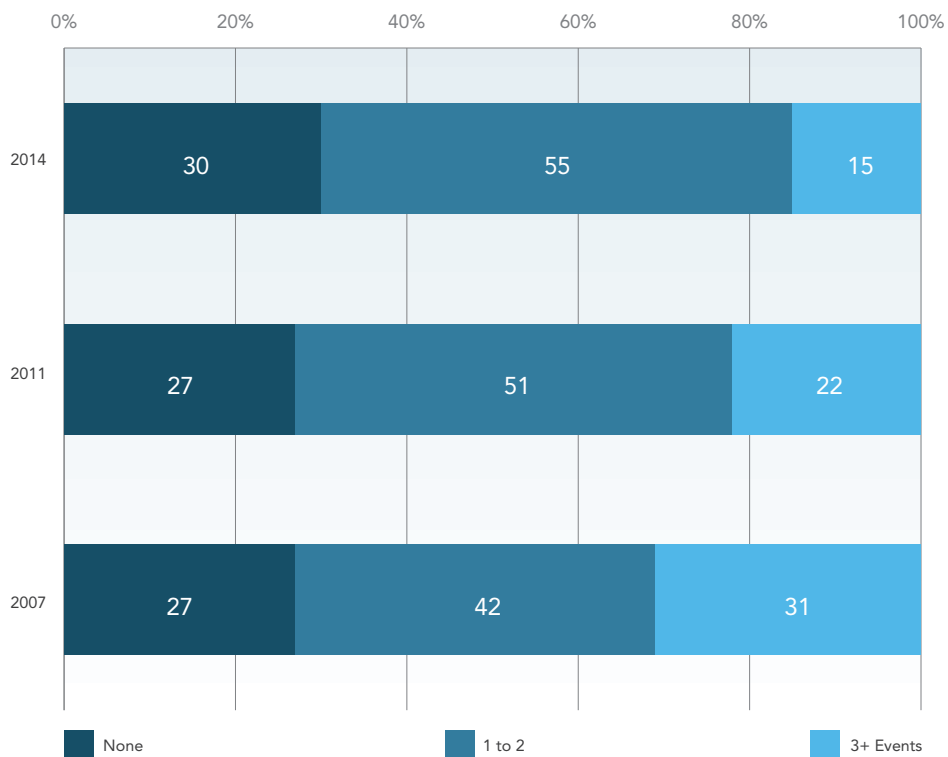
Selected Findings:

- Although respondents are attending a wider variety of cultural activities, the proportion of culturally-engaged audiences who attend three or more cultural events monthly has steadily decreased since 2007.

2. PARTICIPATION PATTERNS

2.3 NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH: BY GENERATION

Question: In a typical month, how many cultural events do you attend?

Legend:
- Millennials (n=680)
- Gen X (n=1203)
- Boomers (n=1803)
- Pre-War (n=340)

	None	1 to 2 Events	3+ Events
Millennials	24	54	22
Gen X	29	58	13
Boomers	34	52	14
Pre-War	29	54	17
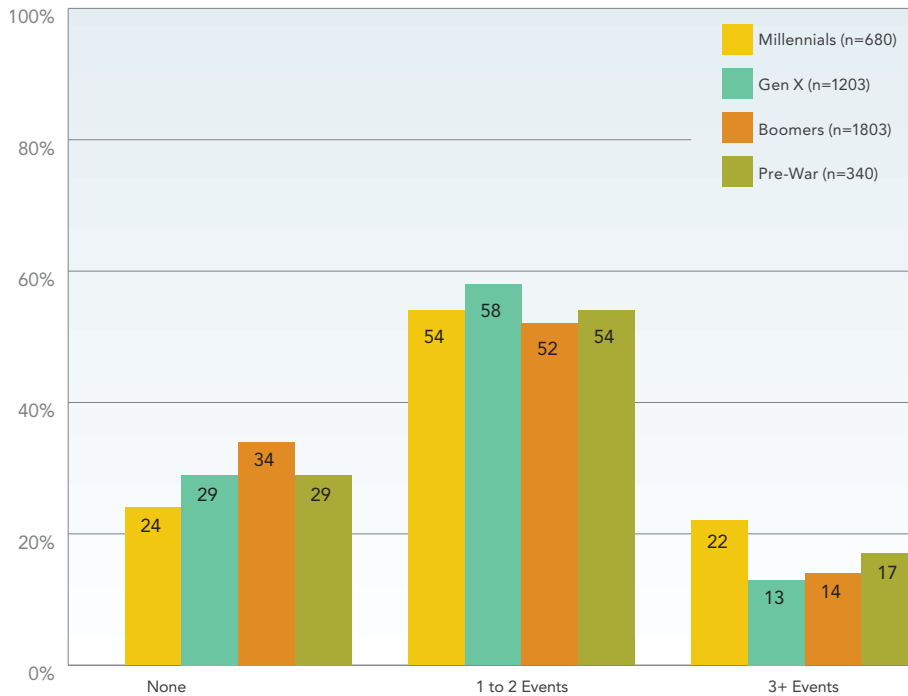
Selected Findings:

• In terms of generational differences, Boomers are less likely than the other generations to attend any event in a typical month, despite the fact that they are arguably the group with the highest disposable income.

• Millennial respondents are the most likely to attend 3 or more events in a typical month.

2. PARTICIPATION PATTERNS

2.4 AVERAGE NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH: BY GENERATION

Question: In a typical month, how many cultural events do you attend?

Events per month

1.75 x/month

1.41

1.36

1.67

Millennials (n=680)   Gen X (n=1203)   Boomers (n=1803)   Pre-War (n=340)
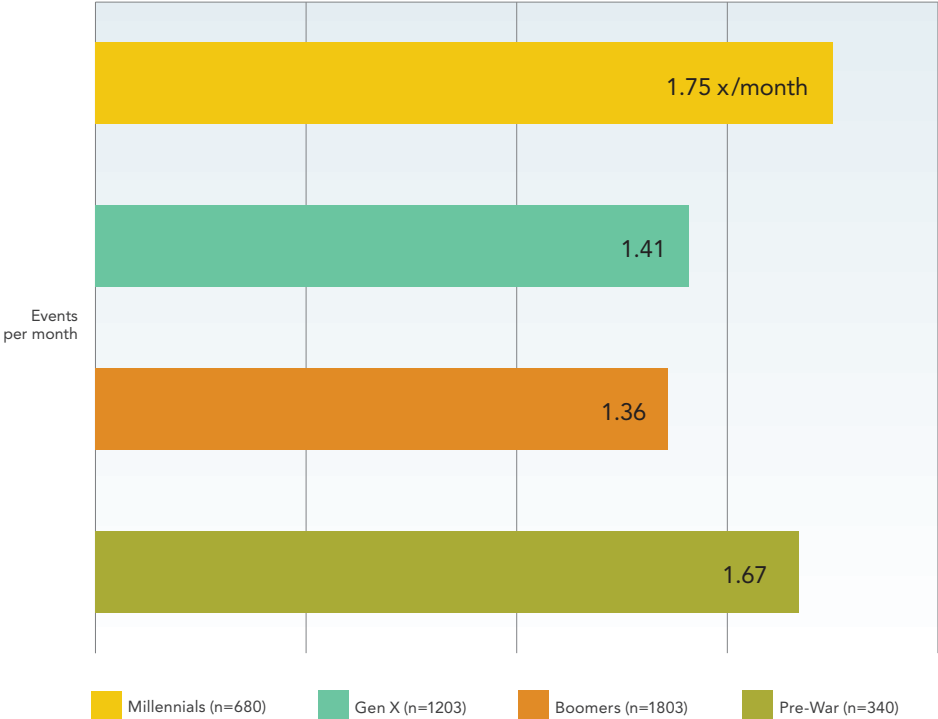
Selected Findings:

• Millennials and Pre-Wars are the most culturally active generations.

2. PARTICIPATION PATTERNS

2.5 IMPACT OF THE ECONOMY ON CULTURAL PARTICIPATION

Question: Has the economy affected your visitation to cultural organizations?
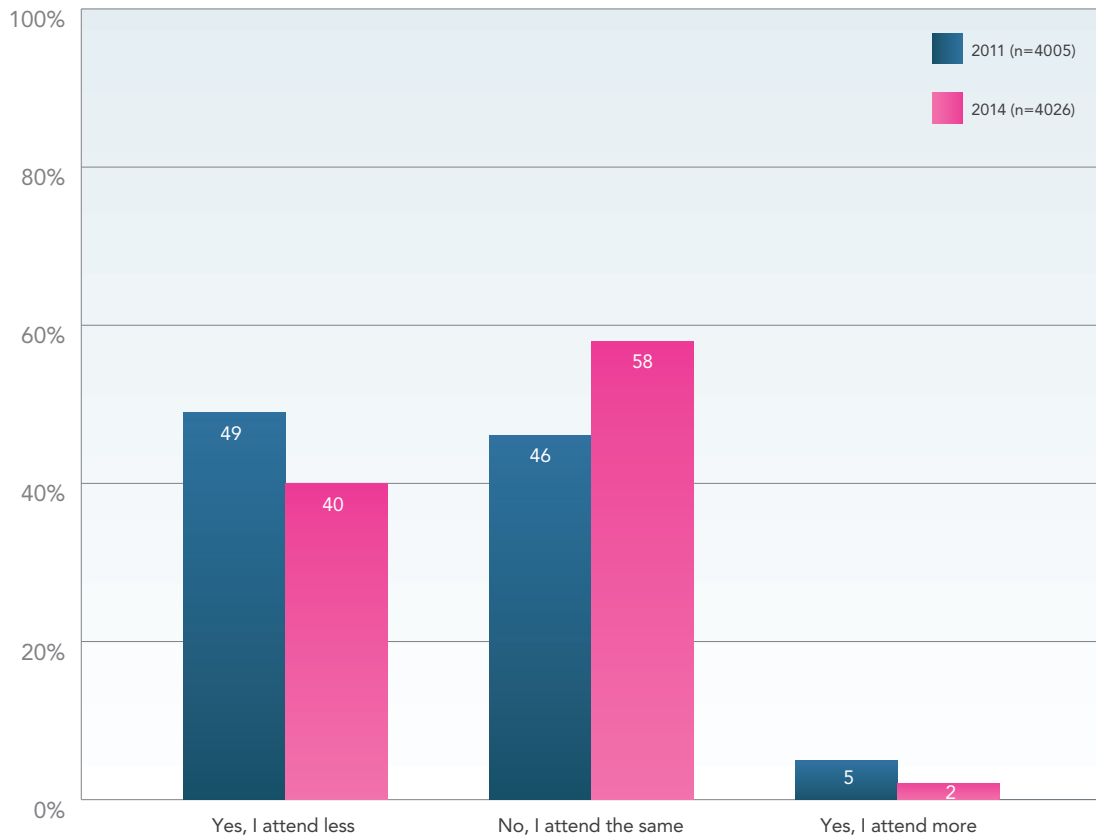
Selected Findings:

• Though the economy continues to influence respondents' cultural participation, its impact has diminished since 2011.

• Almost three in five respondents (58%) say they attend cultural activities about the same amount as they did before, while two in five (40%) say they attend less. Compared to 2011, where half of the respondents were less likely to attend due to the economy, these proportions appear more favorable.

• Only two percent of respondents say they attend more frequently because of the economy.

2. PARTICIPATION PATTERNS

2.6 ECONOMIC REASONS FOR DECREASING CULTURAL PARTICIPATION

Question: If the economy has impacted your visitation to cultural organizations, please tell us how.

Legend:
- 2011 (n=1936)
- 2014 (n=1620)

Category	2011	2014
Reducing expenses across the board	77	82
Cutting back on leisure activities	51	51
Repriortizing leisure time/money	47	51
Prefer to spend more time at home	27	29
Experiencing culture in alternative ways		20
Arts and culture are less relevant	13	11
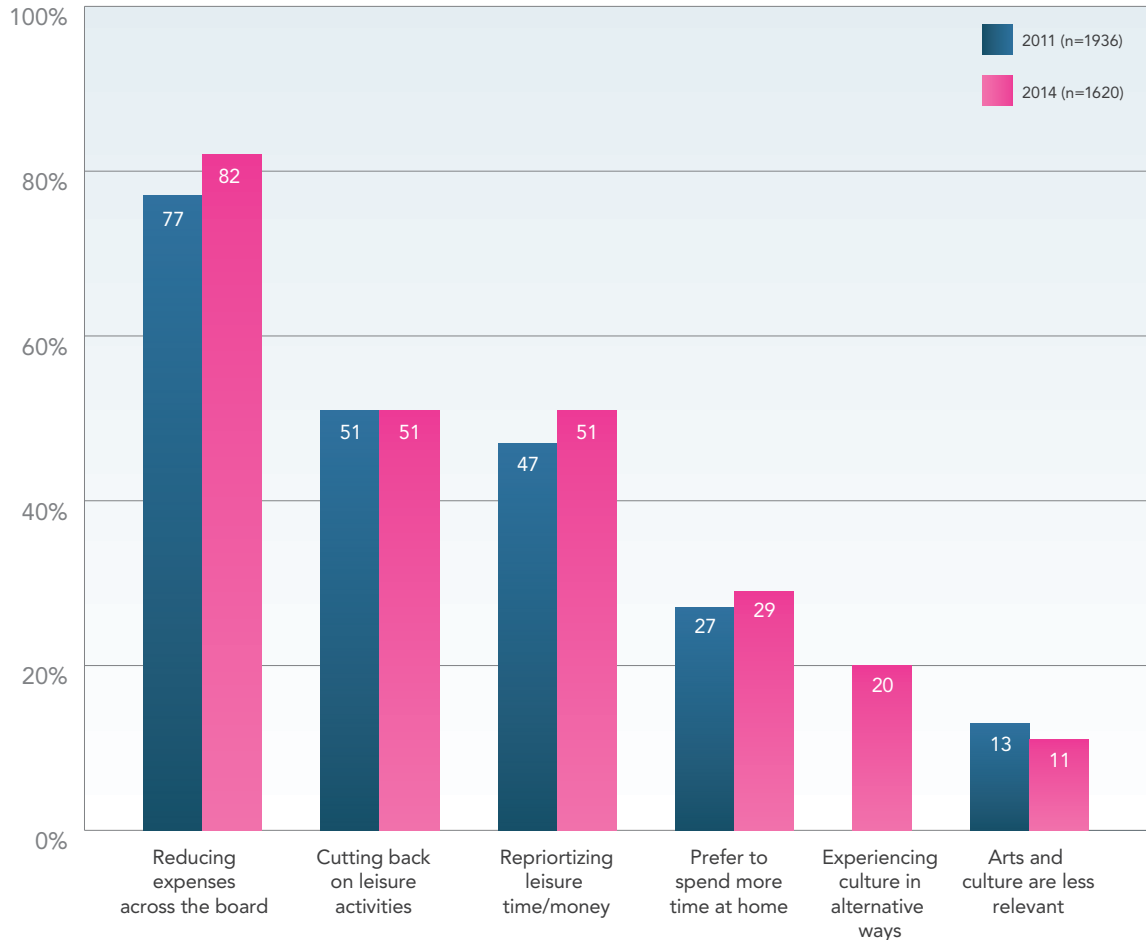
Selected Findings:

• Four in five respondents (82%) say they are reducing expenses across the board due to the economy.

• Half are cutting back specifically on leisure activities (51%) and reprioritizing how they spend their leisure time and money (51%).

• One in five respondents (20%) are experiencing culture in alternative ways (such as online access) a new response option for 2014.

Note: Experience culture in alternative ways was a newly introduced option in 2014.

3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.1 PRINT AND BROADCAST SOURCES FOR CULTURAL ACTIVITIES: OVERALL TRENDS

Question: Do you frequently learn about cultural activities from the following sources?

Legend:
- 2011 (n=4005)
- 2014 (n=4026)

Source	2011	2014
TV*	39	36
Sunday newspaper	40	29
Daily newspaper	37	28
Radio*	28	27
Brochures	22	18
Regional magazines	12	11
Specialty magazines	14	11
National magazines	12	10
Podcasts		3
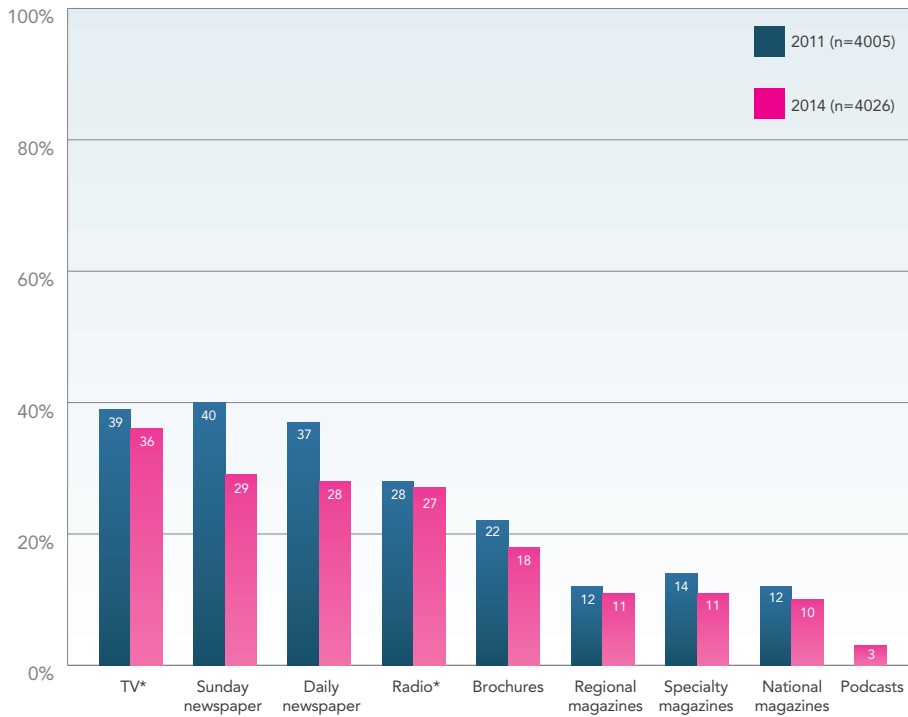
* 2014 combined multiple types of TV or Radio (i.e. Broadcast, Premium, etc.)

Selected Findings:

• Despite the decline in use of TV and newspapers, respondents still most frequently learn about cultural activities through those sources.

Note: Podcasts was a newly introduced option in 2014.

3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.1 PRINT AND BROADCAST SOURCES FOR CULTURAL ACTIVITIES: OVERALL TRENDS (CONT'D)

Question: Do you frequently learn about cultural activities from the following sources?
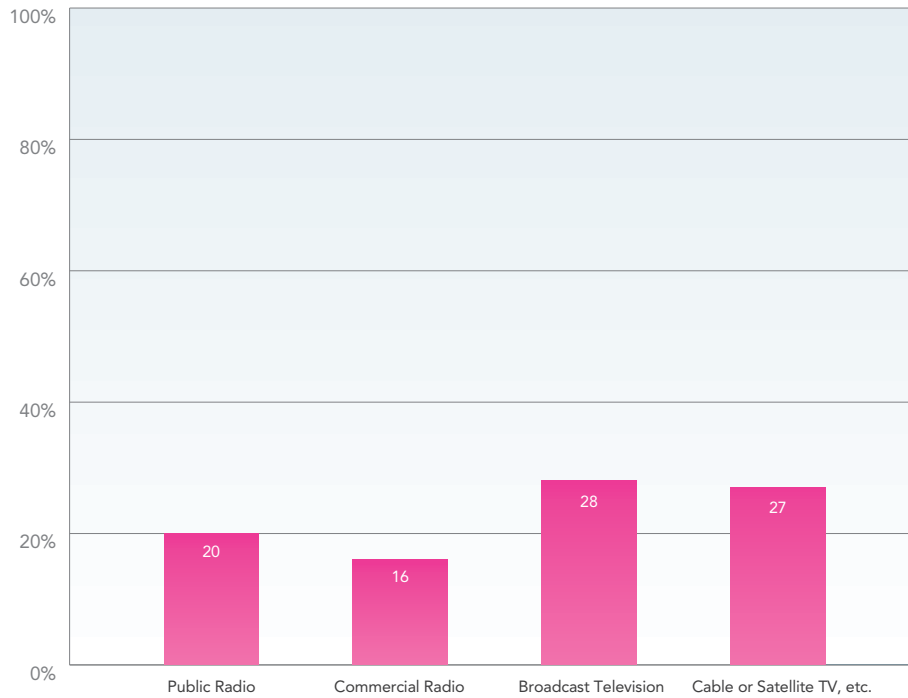
Selected Findings:

• For 2014, radio and television were broken out further into public radio vs. commercial radio and broadcast television vs. cable. The chart above displays the proportion of respondents who frequently learn about cultural activities through these sources.

3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.2 PRINT AND BROADCAST SOURCES FOR CULTURAL ACTIVITIES: BY GENERATION

Question: Do you frequently learn about cultural activities from the following sources?

Legend:
- Millennials (n=680)
- Gen X (n=1203)
- Boomers (n=1803)
- Pre-War (n=340)

Source	Millennials	Gen X	Boomers	Pre-War
TV*	35	34	38	39
Sunday Newspaper	16	24	35	46
Daily Newspaper	15	23	32	43
Radio*	29	30	25	26
Brochures	17	18	19	24
Regional Magazines	12	13	9	11
Specialty Magazines	12	13	10	6
National Magazines	12	9	9	6
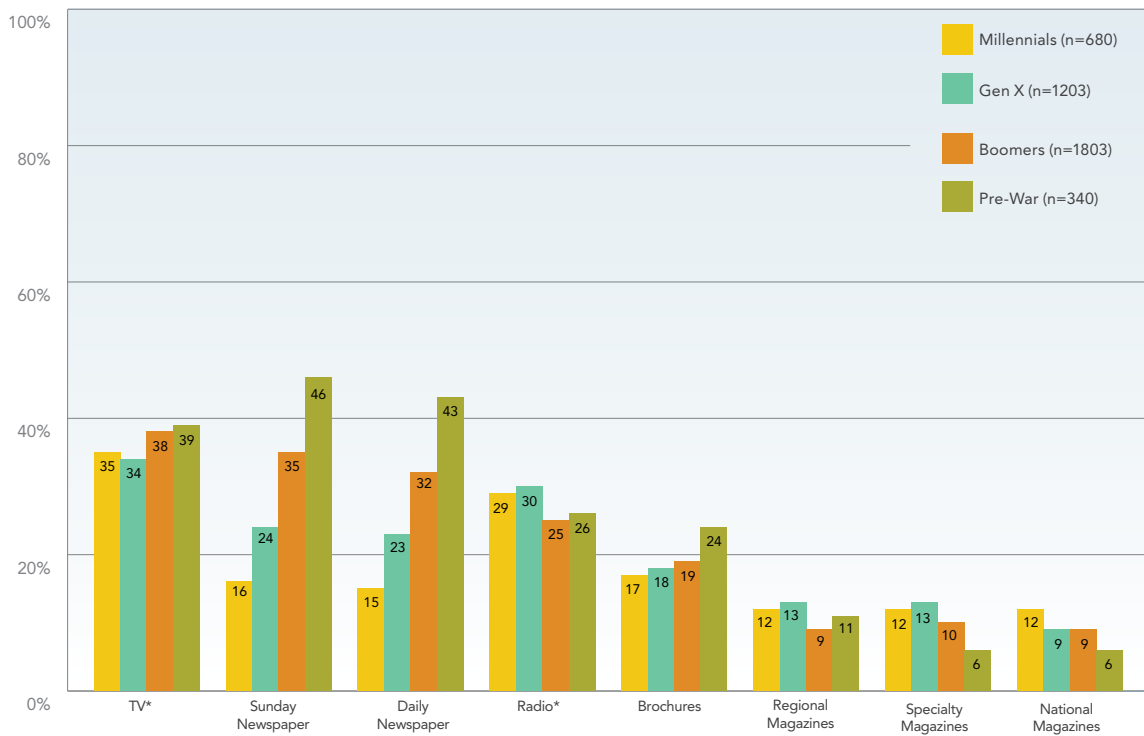
*Combined multiple types of TV or Radio (i.e. Broadcast, Premium, etc.)

Selected Findings:

• The largest generational fluctuations in usage of print and broadcast sources is in newspapers.

Note: Due to the low number of respondents that use podcasts to learn about cultural activities, generational differences were not statistically significant enough to report.

3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.3 ONLINE SOURCES FOR CULTURAL ACTIVITIES: OVERALL TRENDS

Question: Do you frequently learn about cultural activities from the following sources?

Legend:
- 2011 (n=4005)
- 2014 (n=4026)

Source	2011	2014
Social media	20	20
Email newsletters	19	14
Cultural organization websites	13	13
Newspaper websites	13	9
Online magazines	8	7
Cultural organization blogs	8	6
Personal blogs	8	4
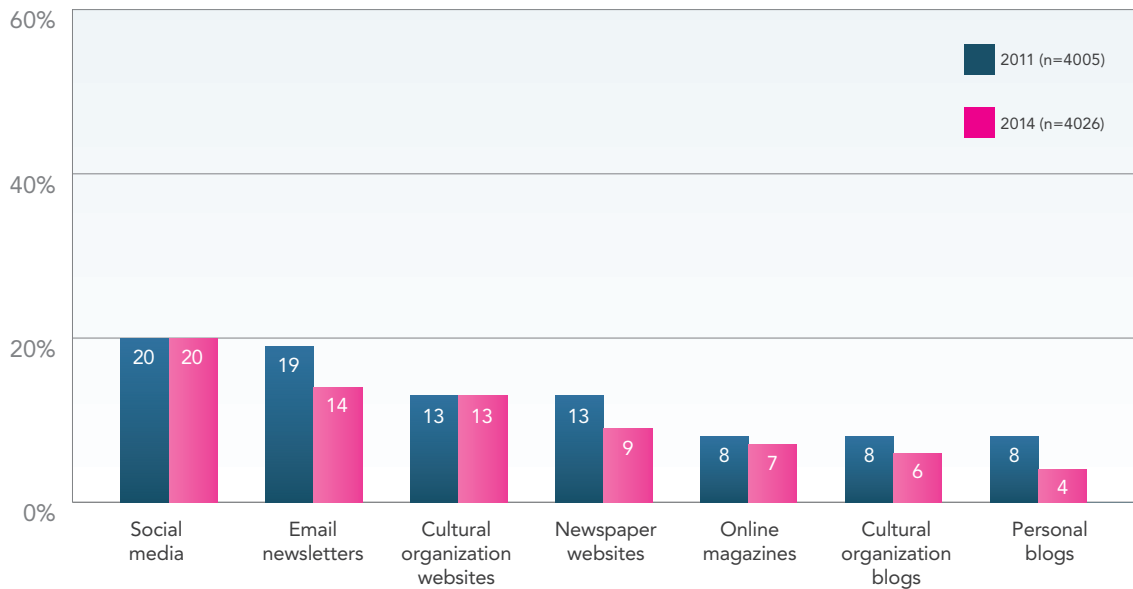
Selected Findings:

• Interestingly, social media ranks relatively low in comparison to print and broadcast sources, with 1 in 5 respondents frequently learning about cultural activities that way. Given that a high proportion of respondents are on social media platforms (see page 21), social media is likely in a transitional moment, and may converge with traditional information sources in the coming years.

• Use of email newsletters, newspaper websites and personal blogs as information sources of cultural activities have decreased slightly.

3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.4 ONLINE SOURCES FOR CULTURAL ACTIVITIES:
BY GENERATION

Question: Do you frequently learn about cultural activities from the following sources?

Millennials (n=680)
Gen X (n=1203)
Boomers (n=1803)
Pre-War (n=340)

	Social Media	Email Newsletters	Cultural Organization Websites	Newspaper Websites	Online Magazines
Millennials	38	15	16	10	11
Gen X	25	14	14	10	8
Boomers	11	13	12	9	5
Pre-War	4	15	9	6	1
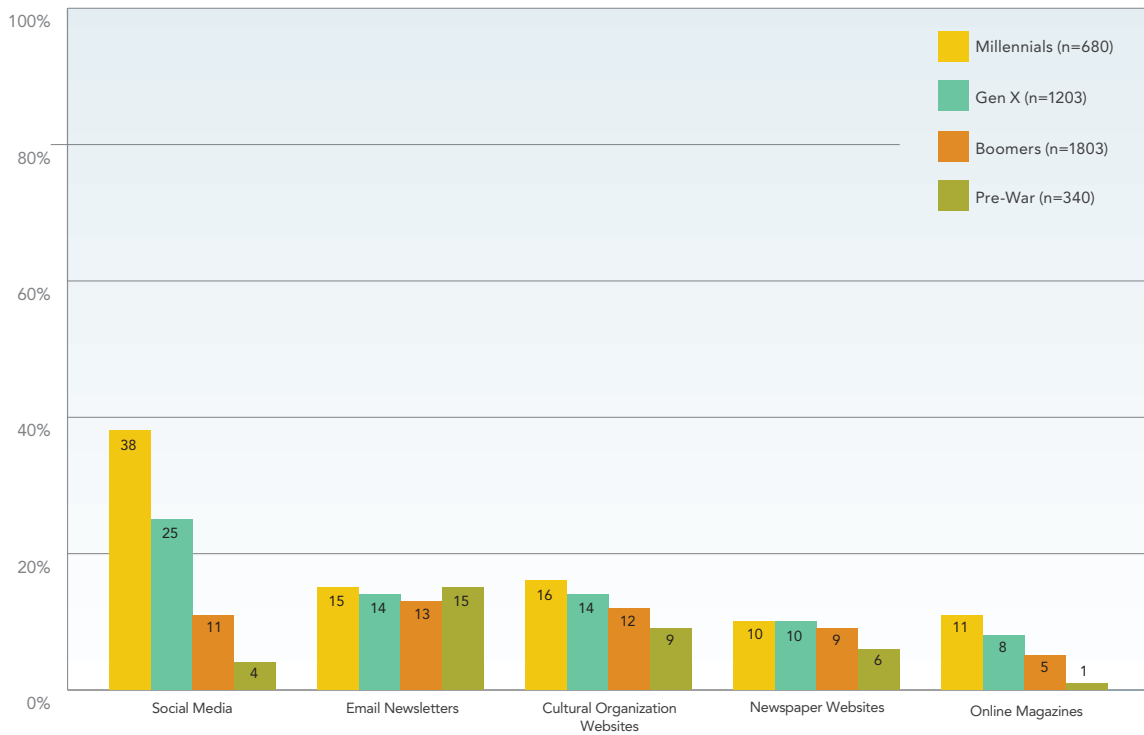
Selected Findings:

• Millennials are more likely to learn about cultural events through social media than any other source—including print and broadcast (see page 17).

3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.5 ONLINE SOURCES FOR CULTURAL ACTIVITIES:
BY FREQUENCY OF ATTENDANCE

Question: Do you frequently learn about cultural activities from the following sources?

Legend:
- No Events (n=1215)
- 1 to 2 Events (n=2189)
- 3+ Events (n=622)

Source	No Events	1 to 2 Events	3+ Events
Social media	8	21	36
Cultural organization websites	1	13	33
Email newsletters	4	14	29
Newspaper websites	1	10	21
Online magazines	2	7	15
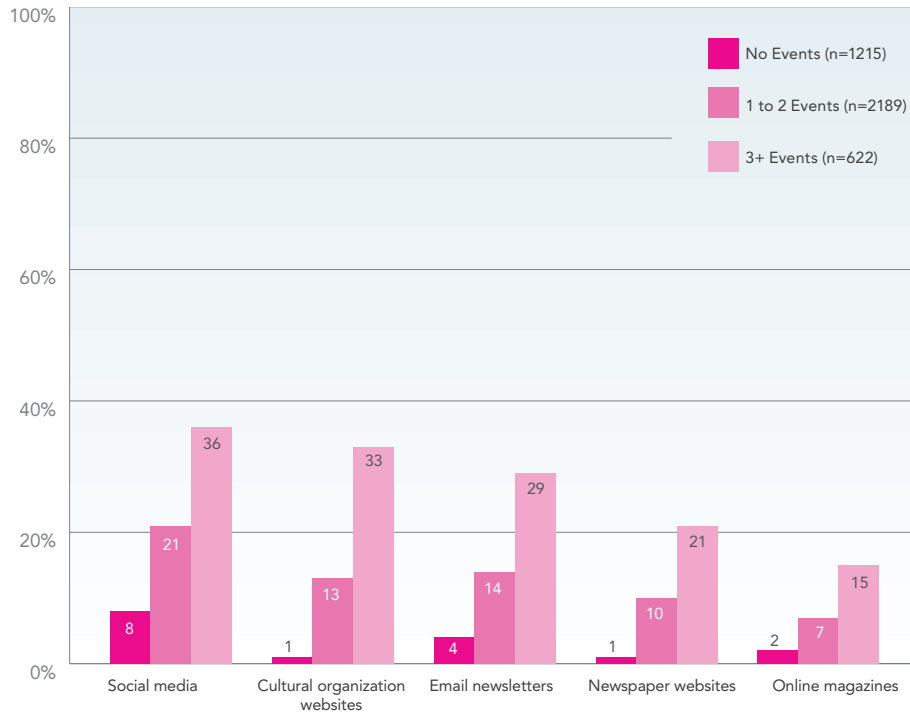
Selected Findings:

• The more culturally active respondents are, the more likely they are to turn to online sources for information about cultural activities.

• A third of those who attend 3 or more events a month say that social media, cultural organization websites, and e-mail newsletters are frequent sources of information.

3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.6 USE OF SOCIAL MEDIA PLATFORMS: OVERALL TRENDS

Question: Please indicate whether you utilize the following social media platforms (whether you actively post or simply browse).

Platform	2011 (n=4005)	2014 (n=4026)
Facebook	72	76
YouTube	69	71
Pinterest		30
Twitter	27	30
Instagram		19
Tumblr		12
Snapchat		9
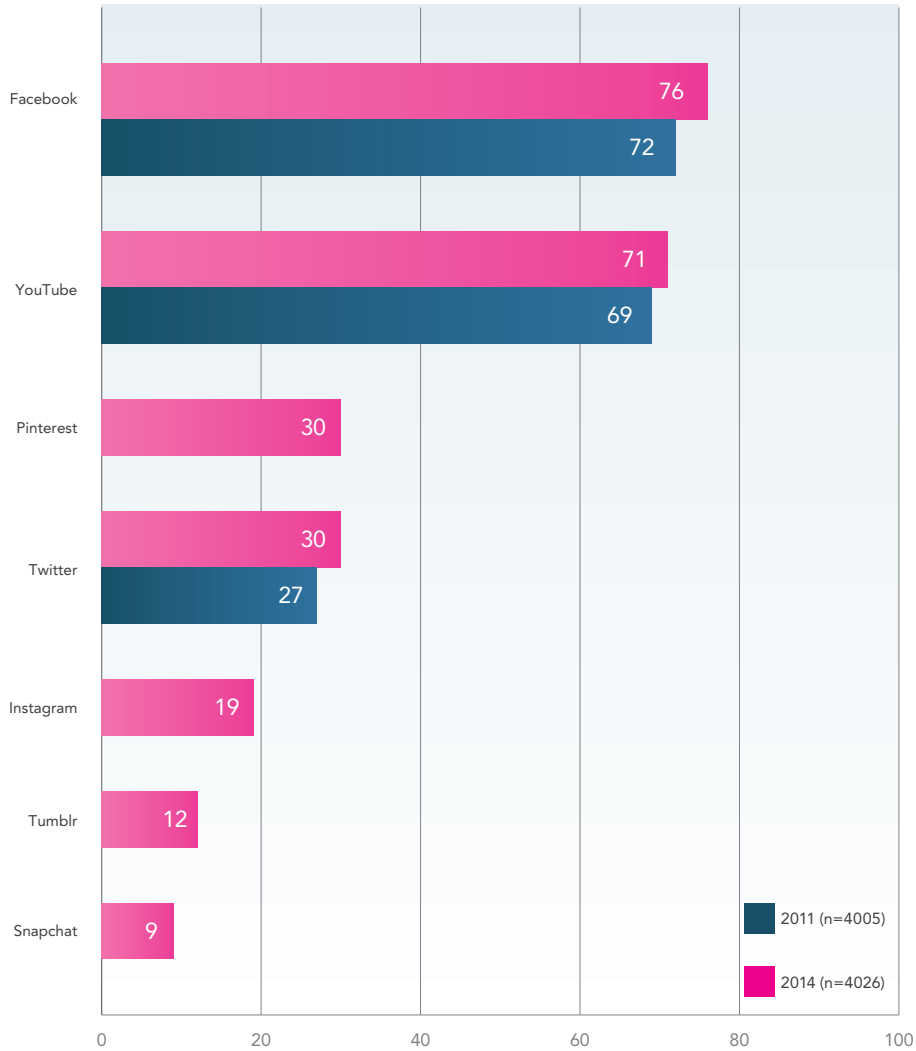
Selected Findings:

• Social media usage has increased slightly in 2014, but has largely remained stable.

Note: Pinterest, Instagram, Tumblr, Snapchat were newly introduced options in 2014.

3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.7 USE OF SOCIAL MEDIA PLATFORMS: BY GENERATION

Question: Please indicate whether you utilize the following social media platforms (whether you actively post or simply browse).

Legend:
- Millennials (n=680)
- Gen X (n=1203)
- Boomers (n=1803)
- Pre-War (n=340)

Platform	Millennials	Gen X	Boomers	Pre-War
Facebook	92	83	69	60
YouTube	91	79	63	46
Twitter	55	38	20	9
Pinterest	48	35	23	10
Instagram	44	24	9	1
Tumblr	34	13	6	1
Snapchat	29	8	3	0
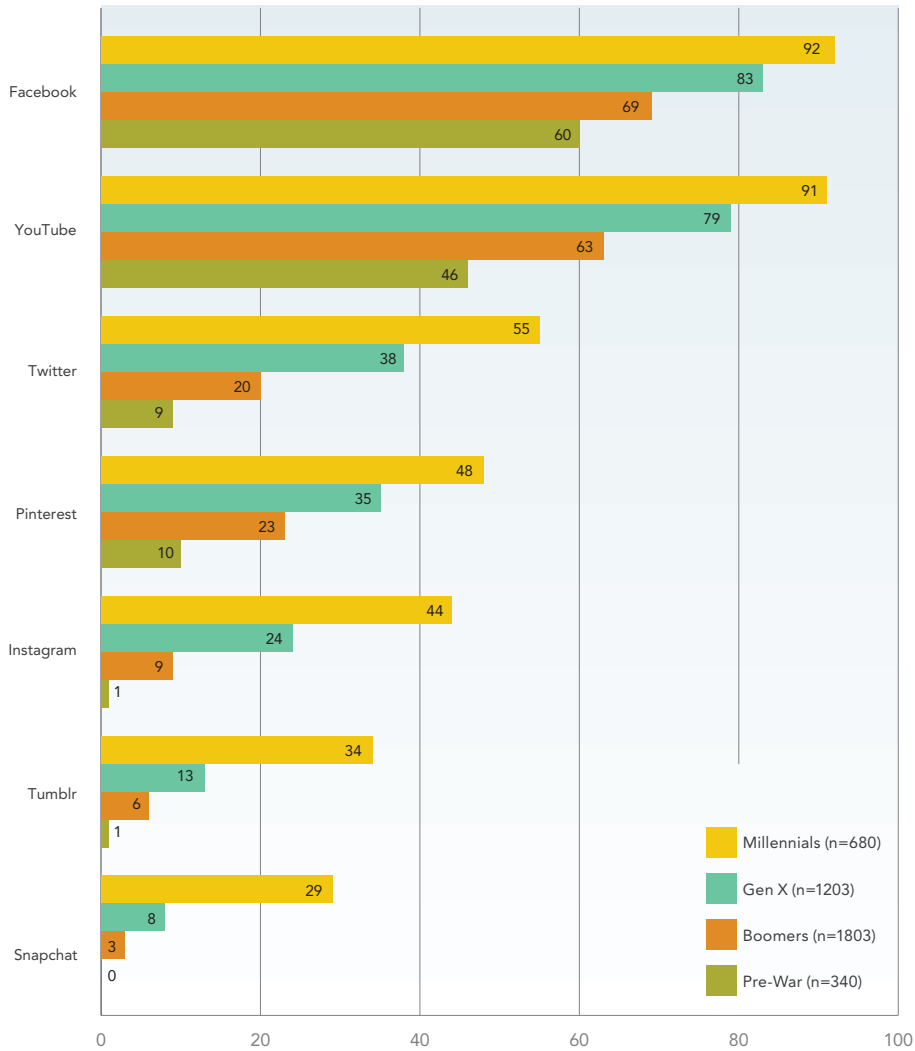
3. INFORMATION SOURCES FOR CULTURAL ACTIVITIES

3.7 USE OF SOCIAL MEDIA PLATFORMS: BY GENERATION (CONT'D)

Selected Findings:

• The use of social media platforms is largely driven by age. The younger the respondents, the more likely they are to use any of these platforms.

• However, Gen X, Boomers, and Pre-Wars are quite active on Facebook and YouTube as well.

• The cross-generational use of social media suggests that enormous potential for social media marketing exists—but cultural institutions have yet to "cut through the noise."

• The sharp generational differences in cases like Instagram, Tumblr, and Snapchat illustrate the rapid adoption of newer social media platforms by younger generations.

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.1 REASONS TO MAKE CULTURE A PART OF ONE'S LIFE: OVERALL TRENDS

Question: Please tell us whether each of the following play an important role in your decision to make cultural activities a part of your life.

Reason	2011 (n=4005)	2014 (n=4026)
Entertainment/enjoyment	89	93
Spend time with friends and family	84	83
Expand my knowledge and understanding		79
Interest in an artist, genre, or work of art	73	77
Support a friend of family member involved	75	77
Interest in learning about another time or culture	69	76
Expose or introduce myself to something new	68	73
Experience the high quality of the performance/art	65	71
Support organizations that are important to me/my community	64	67
Escape everyday stress and rejuvenate	67	66
Family or personal tradition	64	61
Experience and enjoy a community space		56
Connect with others enjoying the same event		54
Introduce culture to my family	55	54
Learn about or celebrate my cultural heritage	57	52
Enhance my sense of self or identity		45
Be "in the know" about the latest trends	31	23
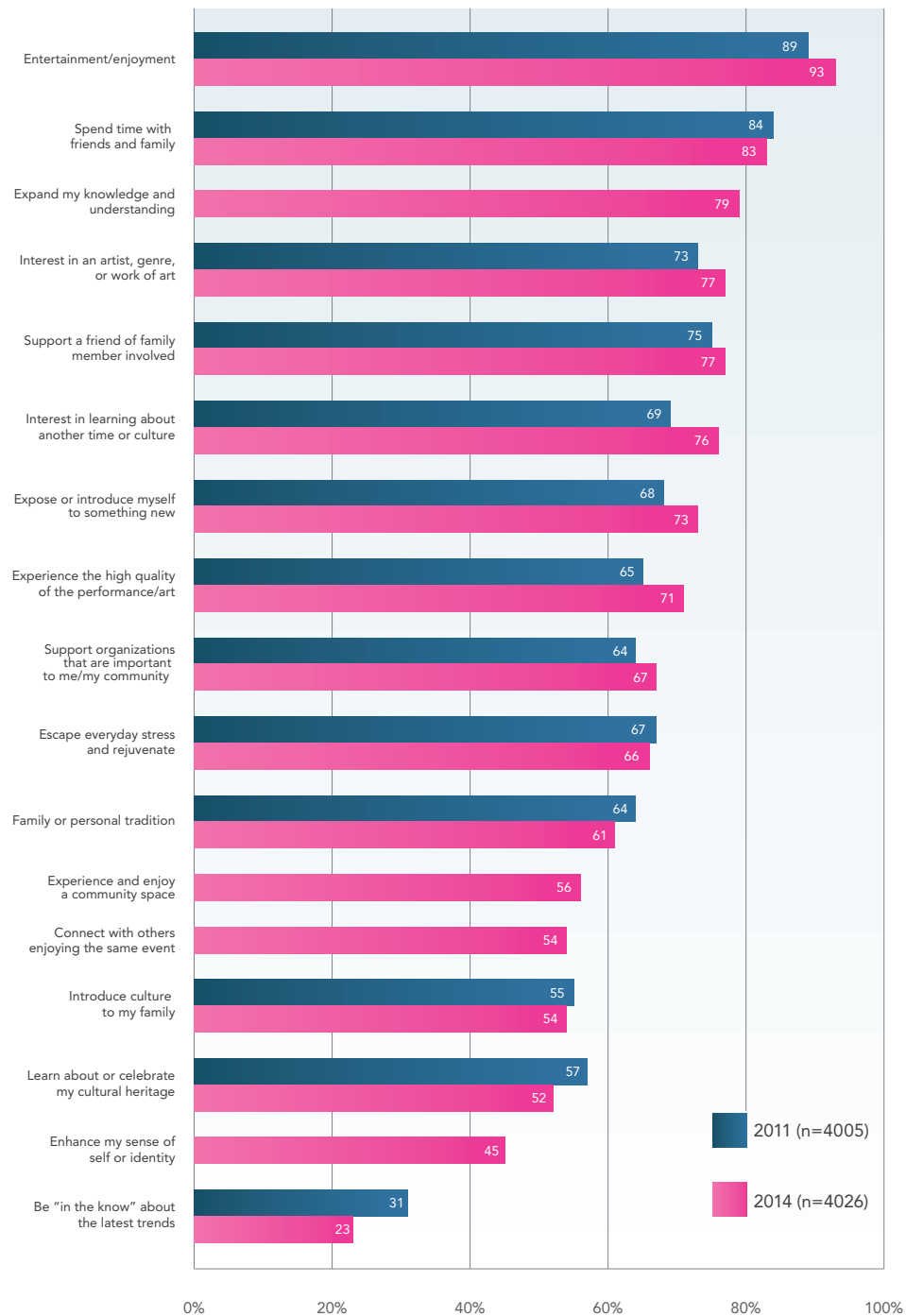
Note: In instances where 2011 data is not shown, those options were newly introduced in 2014.

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.1 REASONS TO MAKE CULTURE A PART OF ONE'S LIFE: OVERALL TRENDS (CONT'D)

Selected Findings:

• The top three factors a culturally-engaged person typically considers when deciding whether to spend their time on a cultural activity are: "Is it entertaining?", "Can I do it with my friends or family?" and "Does this activity expand my knowledge and understanding?" (first measured this year).

• There is a noticeable increase in the importance of learning about another time or culture, exposing or introducing oneself to something new, and experiencing the high quality of the performance/art.

• Notably, culturally-engaged audiences report that being "in the know" or enhancing their own sense of self or personal identity are not top motivators to make culture a part of their lives.

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.2 REASONS TO MAKE CULTURE A PART OF ONE'S LIFE: BY GENERATION

Question: Please tell us whether each of the following play an important role in your decision to make cultural activities a part of your life.

Reason	Millennials (n=680)	Gen X (n=1203)	Boomers (n=1803)	Pre-War (n=340)
Entertainment/enjoyment	93	92	94	93
Spend time with friends and family	87	87	80	78
Expand my knowledge and understanding	83	81	78	73
Interest in an artist, genre, or work of art	79	76	77	72
Support a friend of family member involved	79	81	74	76
Interest in learning about another time or culture	78	78	75	68
Expose or introduce myself to something new	77	76	71	67
Escape everyday stress and rejuvenate	73	69	64	47
Experience the high quality of the performance/art	73	68	72	77
Support organizations that are important to me	71	69	71	75
Family or personal tradition	66	61	59	55
Connect with others enjoying the same event	60	53	52	52
Experience and enjoy a community space	60	57	54	50
Enhance my sense of self or identity	57	49	41	28
Learn about or celebrate my cultural heritage	57	53	51	45
Support organizations that are important to my community	57	62	64	66
Introduce culture to my family	56	62	51	40
Be "in the know" about the latest trends	32	26	19	15

(Continued on following page)

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.2 REASONS TO MAKE CULTURE A PART OF ONE'S LIFE: BY GENERATION (CONT'D)

Selected Findings:

• The younger the respondent, the more likely they are to view cultural activities as a way to escape everyday stress and rejuvenate.

• Gen X respondents are more likely than any other generation to participation in cultural activities as a way to introduce culture to their family.

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.3 PLANNING CONSIDERATIONS

Question: Please tell us whether the following are important factors in planning to attend a cultural activity.

Factor	2011	2014
Convenience of location/hours*	85	87
Availability of family activities**	88	79
Ability to plan a visit in advance	77	78
Ease of parking		74
Ability to plan a visit at the last minute	62	58
Ability to plan a visit online	55	54
Availability of amenities	58	51
Being able to spend all or most of the day at a destination	60	49
Activities/services to supplement the experience	51	44
Being able to spend a brief amount of time at a destination	49	42

2011 (n=4005)
2014 (n=4026)

*for 2014, average of two items
**based on those with children

Selected Findings:

• For the vast majority of respondents, convenience of both hours and location, ease of parking, and the ability to plan a visit in advance are the most important factors in planning to attend a cultural event.

• For those with children, the availability of family activities is also very important.

Note: Ease of parking was a newly introduced option in 2014.

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.4 MOTIVATORS FOR ATTENDING CULTURAL ACTIVITIES: OVERALL TRENDS

Question: Please tell us whether the following factors influence your decision to attend a cultural activity.

Motivator	2014 (n=4005)	2011 (n=4026)
Topic of program or event	90	
Cost of the event	86	83
Invited by family or friends	83	81
Friends' recommendations	81	75
My spouse/partner is interested	73	73
Availability of discounted tickets	72	72
Ease of obtaining tickets	71	66
Special event	62	61
Transportation/ convenience of parking	60	63
At favorite venue	59	57
Support a local institution	55	
Publicity or buzz	49	51
Recommendation by a critic	29	33
Appealing to children*	72	80

* based on those with children
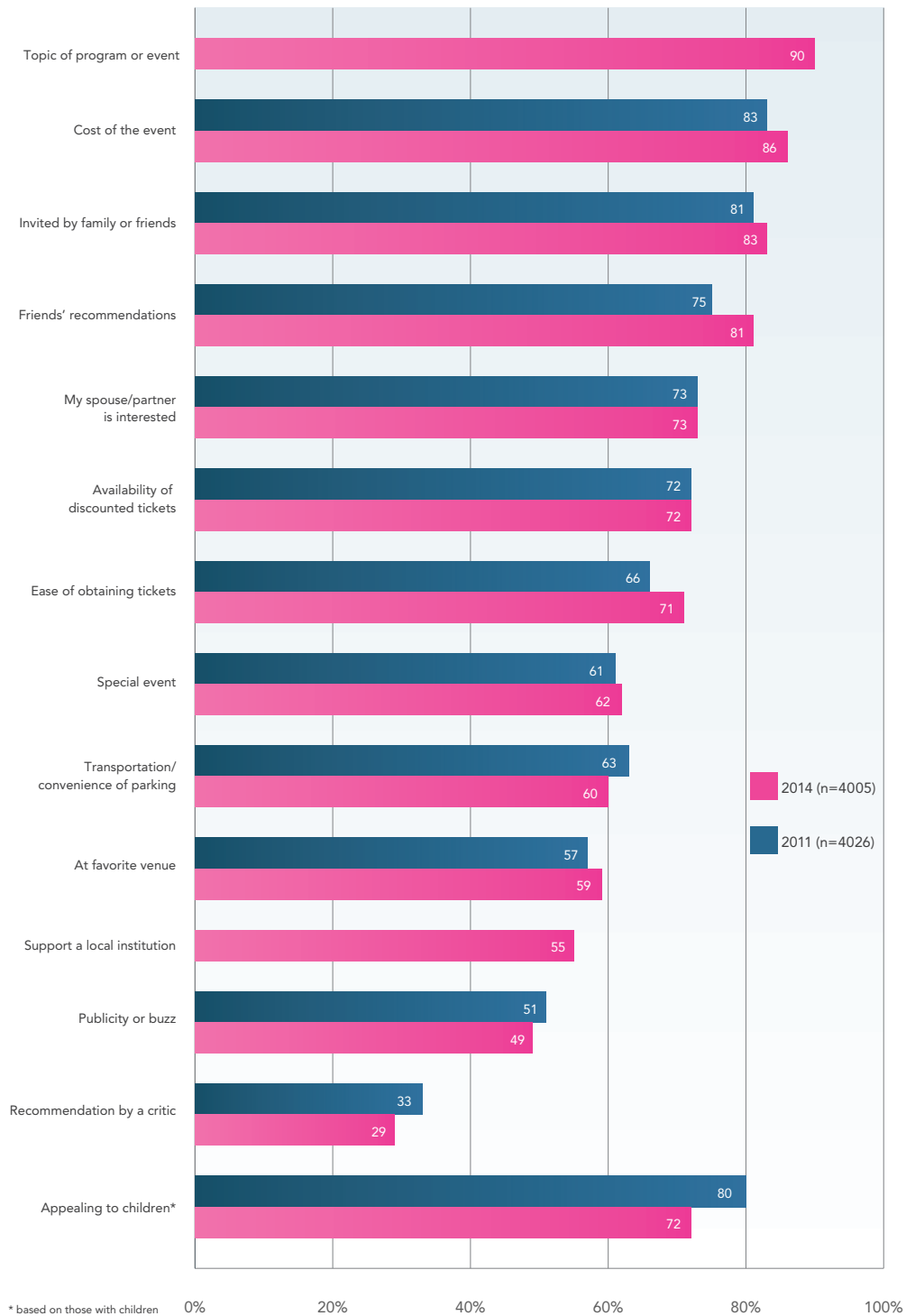
Note: In instances where 2011 data is not shown, those options were newly introduced in 2014.

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.4 MOTIVATORS FOR ATTENDING CULTURAL ACTIVITIES: OVERALL TRENDS (CONT'D)

Selected Findings:

• The most important factor influencing cultural engagement is the topic of the program or event; the subject matter must speak to the participant in some way for them to make the effort to engage.

• Following close behind is the cost of the event and whether or not friends, family and/or spouse or partner are interested in the topic.

• Respondents are also heavily influenced by recommendations from their inner circle—much more so than recommendations from critics or buzz.

4.5 MOTIVATORS FOR ATTENDING CULTURAL ACTIVITIES: BY FREQUENCY OF ATTENDANCE

Question: Please tell us whether the following factors influence your decision to attend a cultural activity.

Factor	No Events	1 to 2 Events	3+ Events
Topic of program or event	83	91	95
Friends' recommendations	69	86	89
Invited by family or friends	77	87	87
Cost of the event	84	88	85
Ease of obtaining tickets	59	75	80
Special event	45	66	78
My spouse/partner is interested	67	75	76
Appealing to children*	60	75	75
Availability of discounted tickets	66	74	72
Support a local institution	36	60	70
At favorite venue	46	61	70
Transportation/ convenience of parking	53	63	64
Publicity or buzz	35	54	61
Recommendation by a critic	15	32	45

* based on those with children

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.5 MOTIVATORS FOR ATTENDING CULTURAL ACTIVITIES: BY FREQUENCY OF ATTENDANCE (CONT'D)

Selected Findings:

• The less culturally active the respondent, the less likely they are to be influenced by any of the listed factors.

• The more culturally-active the respondent, the more likely they are to be influenced by all of the listed factors—with the notable exception of factors related to cost. For those factors, those who attend 1 to 2 events per month are most likely to be influenced.

4.6 BARRIERS TO ATTENDING CULTURAL ACTIVITIES: OVERALL TRENDS

Question: What are the barriers, if any, that prevent you from attending cultural activities?

Barrier	2011	2014
It costs too much	68	70
The activity or event does not appeal to me	50	56
It is too much of a hassle to get there	39	44
The activity or event is not relevant to my life		37
It is not child-friendly*		31
I cannot find anyone to go with/my friends or family are not interested	26	28
It is difficult to find the time to attend	23	28
The hours of operation are inconvenient	20	28
I'd rather spend my leisure time in other ways		24
I have not enjoyed my prior experiences	11	13
I find it unwelcoming	9	13
I don't like getting dressed up and I feel I have to	13	12
Not physically accessible to me	13	9
I find it hard to connect with cultural activities in general	11	7
Cultural organizations are intimidating		4
The activity or event is not interactive		4
Other, please specify	4	2
None of the above	8	5

2011 (n=4005)
2014 (n=4026)

* based on those with children

Note: In instances where 2011 data is not shown, those options were newly introduced in 2014.

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.6 BARRIERS TO ATTENDING CULTURAL ACTIVITIES: OVERALL TRENDS (CONT'D)

Selected Findings:

• In general, 2014 respondents are more likely to cite each item as a potential barrier compared to 2011 respondents.

• Cost and lack of interest in the event are the two key barriers that prevent people from attending cultural activities, followed by the hassle of getting there and not feeling that the event is personally relevant.

• Among those with children, approximately a third consider an event not being "child-friendly" a barrier to participation.

4.7 BARRIERS TO ATTENDING CULTURAL ACTIVITIES: BY GENERATION

Question: What are the barriers, if any, that prevent you from attending cultural activities?

It costs too much
71
71
70
68

The activity or event does not appeal to me
47
49
61
77

I cannot find anyone to go with/my friends or family are not interested
43
26
25
27

It is difficult to find the time to attend
43
34
22
12

It is too much of a hassle to get there
39
40
46
55

The activity or event is not relevant to my life
33
30
40
55

The hours of operation are inconvenient
30
28
27
29

I'd rather spend my leisure time in other ways
27
24
24
24

I find it unwelcoming
16
13
11
13

I have not enjoyed my prior experiences
13
11
14
13

It is not child-friendly*
41
34
16

Not physically accessible to me
10
7
9
14

I don't like getting dressed up and I feel I have to
10
11
14
15

I find it hard to connect with cultural activities in general
8
6
6
9

The activity or event is not interactive
8
5
2
3

Cultural organizations are intimidating
5
4
3
4

Other, please specify
2
2
3
3

None of the above
5
5
6
3

Millennials (n=680)
Gen X (n=1203)
Boomers (n=1803)
Pre-War (n=340)

0%   20%   40%   60%   80%   100%

* based on those with children

(Continued on following page)

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

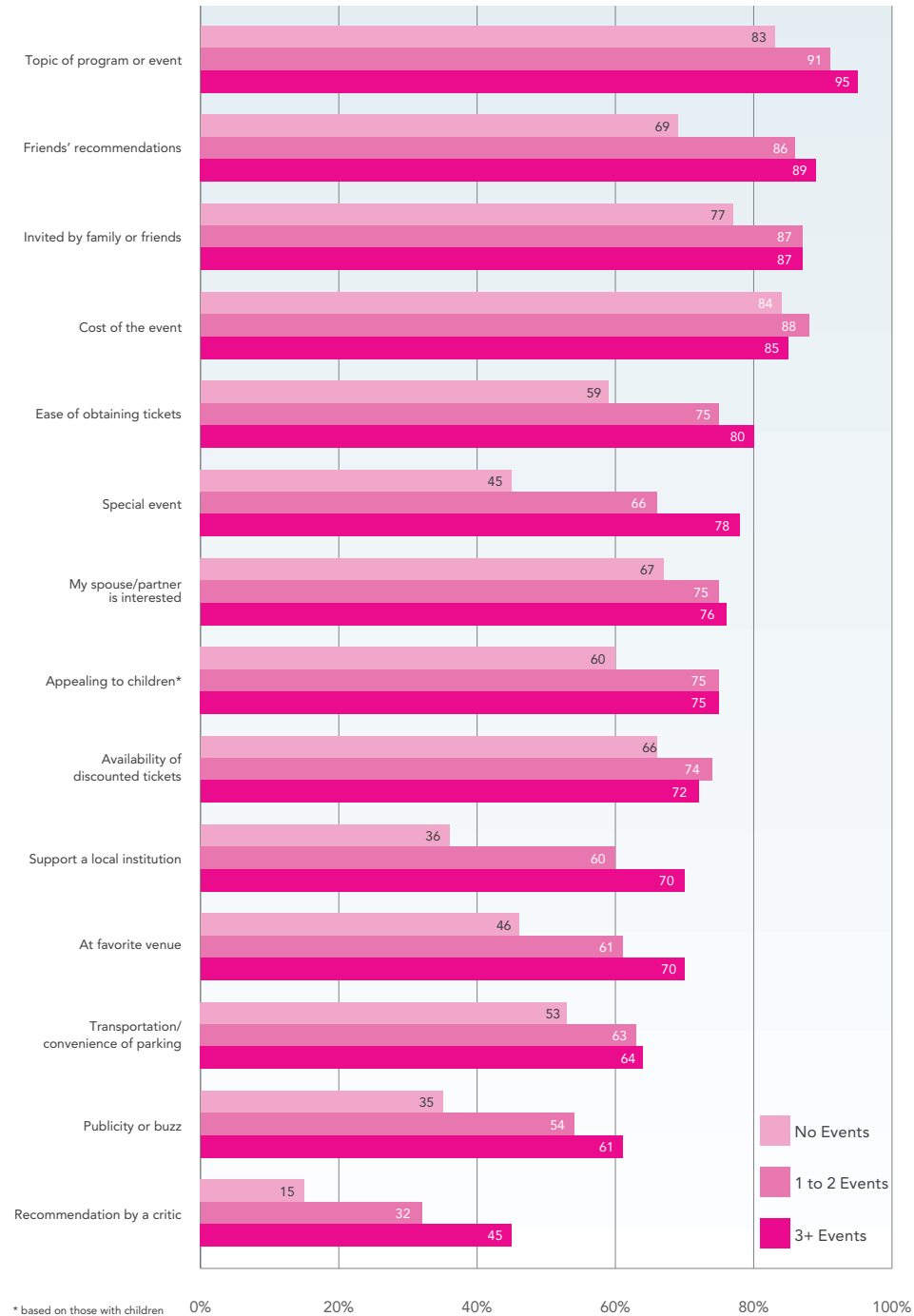## 4.7 BARRIERS TO ATTENDING CULTURAL ACTIVITIES: BY GENERATION (CONT'D)

Selected Findings:

• Millennials are far less likely than older generations to go to a cultural activity if it means going alone.

• Over 75% of Pre-Wars won't go to a cultural activity if they feel that the topic is not appealing to them.

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.8 INCENTIVES FOR CULTURAL PARTICIPATION

Question: Which of the following items would increase your participation in cultural activities?

Incentive	2011 (n=4005)	2014 (n=4026)
Tickets were less expensive	72	75
Free programs or events	41	48
More convenient transportation and/or parking	43	42
I could dress casually	39	38
Programs targeted towards my age or interest group	23	32
Incentives for bringing family or friends	34	32
I was given more information in advance about the event	25	30
I could purchase tickets last-minute	29	29
A more convenient or extended programming schedule	22	23
The cultural organization provided online resources to plan my visit	13	21
I felt more invited or welcomed by the cultural organization	14	15
Friendlier Staff	16	15
Resources that enhance my visit	14	13
Connections with local community organizations	15	13
Events with opportunities for socializing	15	13
Guaranteed premium access or seating for a higher ticket price	11	8
Other	4	2
None of the above	8	7

4. MOTIVATORS AND BARRIERS TO PARTICIPATION

4.8 INCENTIVES FOR CULTURAL PARTICIPATION (CONT'D)

Selected Findings:

• Cost and convenience are the main enticements that would encourage respondents to participate more—particularly less expensive tickets, which interestingly is far more important to respondents than free programs or events.

5. ENHANCING THE CULTURAL EXPERIENCE

5. ENHANCING THE CULTURAL EXPERIENCE

5.1 PREPARING FOR A CULTURAL EXPERIENCE: OVERALL TRENDS

Question: If you prepare for your visit to a cultural organization in advance, which information sources do you use?
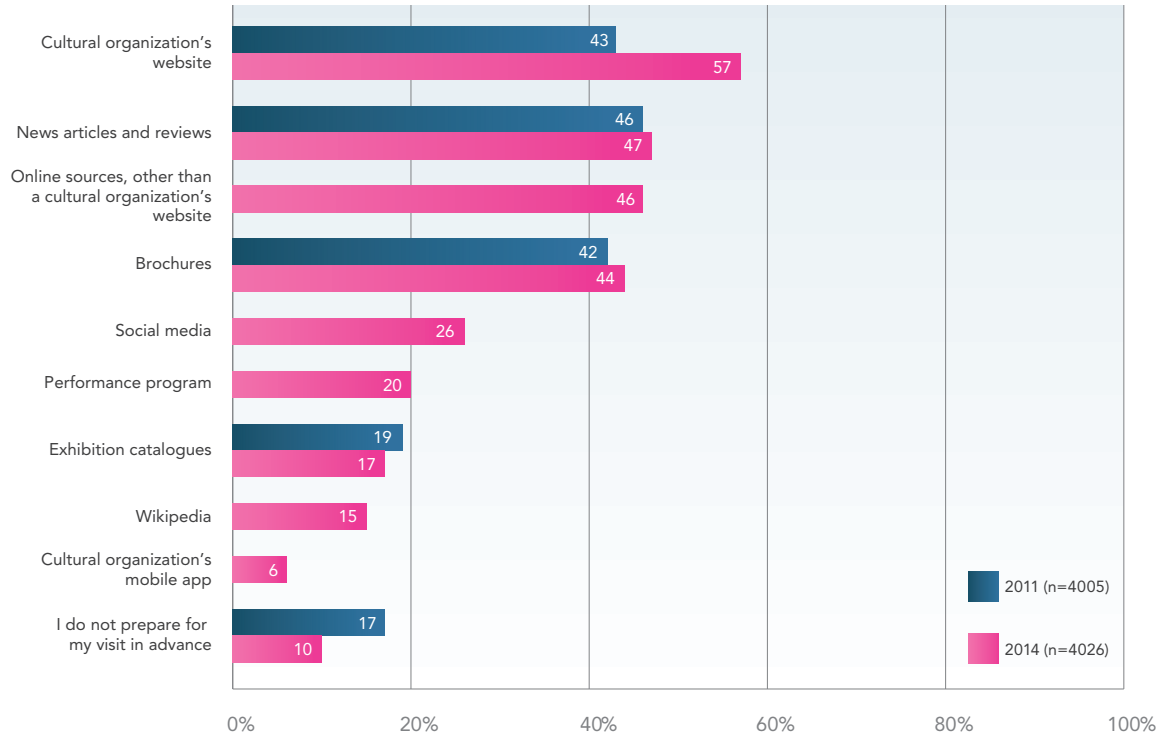
Selected Findings:

• Of the resources used to prepare for a cultural experience, there has been a sizable increase in the proportion of respondents now visiting the cultural organizations' website, while usage of other items (brochures, catalogues, news articles and reviews) has remained relatively stable.

• Very few respondents (6%) use a cultural organization's mobile app to prepare for their visit.

Note: In instances where 2011 data is not shown, those options were newly introduced in 2014.

5. ENHANCING THE CULTURAL EXPERIENCE

5.2 PREPARING FOR A CULTURAL EXPERIENCE: BY GENERATION

Question: If you prepare for your visit to a cultural organization in advance, which information sources do you use?

Category	Millennials (n=680)	Gen X (n=1203)	Boomers (n=1803)	Pre-War (n=340)
Cultural organization's website	63	58	57	41
Social media	51	32	17	7
Online sources, other than a cultural organization's website	51	52	43	30
Brochures	37	42	45	53
News articles and reviews	36	41	53	63
Performance program	24	18	20	21
Wikipedia	23	15	12	9
Exhibition catalogues	17	17	16	19
Cultural organization's mobile app	9	7	4	1
Other, please specify	2	2	3	5
I do not prepare for my visit in advance	6	9	12	12

5. ENHANCING THE CULTURAL EXPERIENCE

5.2 PREPARING FOR A CULTURAL EXPERIENCE:
BY GENERATION (CONT'D)

Selected Findings:

• Each generation turns to very different sources to prepare for a cultural experience. Younger generations are more likely to turn to online sources (organization's website, social media, other websites, Wikipedia, mobile apps), while the older generations turn to more traditional print sources (brochures, articles and reviews).

• Millennials are nearly twice as likely to use social media to prepare for an event compared to Gen X, nearly three times more likely than Boomers, and over seven times more likely than Pre-Wars.

• Regardless of age, the dominant online media resource cultural audiences use to prepare for their visit is the organization's website.

5. ENHANCING THE CULTURAL EXPERIENCE

5.3 ENRICHING THE EXPERIENCE ON-SITE

Question: When you visit a cultural organization, what additional information do you use to enrich your visit on-site?

Category	2011	2014
Brochures, guides, or other printed materials available on-site	62	63
Performance program	43	42
Guided tour by an individual (staff, volunteer, etc.)	24	36
Wall text or labels	27	35
Exhibition catalogue	33	33
Self-guided audio/ audio-visual tour	20	31
Cultural organization's website		29
Online content, other than a cultural organization's website		18
Wikipedia		8
Cultural organization's app		5
Online "game" relating to the exhibition or organization		4
Other, please specify	4	1
None of the above	14	12

Legend: 2011 (n=4005), 2014 (n=4026)

Note: In instances where 2011 data is not shown, those options were newly introduced in 2014.

(Continued on following page)

5. ENHANCING THE CULTURAL EXPERIENCE

5.3 ENRICHING THE EXPERIENCE ON-SITE (CONT'D)

Selected Findings:

• Almost nine in ten respondents use supplemental information to enrich their visit or experience.

• Three in five (62%) use brochures, guides, or other printed materials available online, and two in five (43%) use performance programs.

• A third (36%) use a guided tour by an individual, wall text (35%), exhibition catalogues (33%), or a self-guided audio-tour (31%).

5. ENHANCING THE CULTURAL EXPERIENCE

5.4 OWNERSHIP OF MOBILE DEVICES

Question: Do you own the following mobile devices?
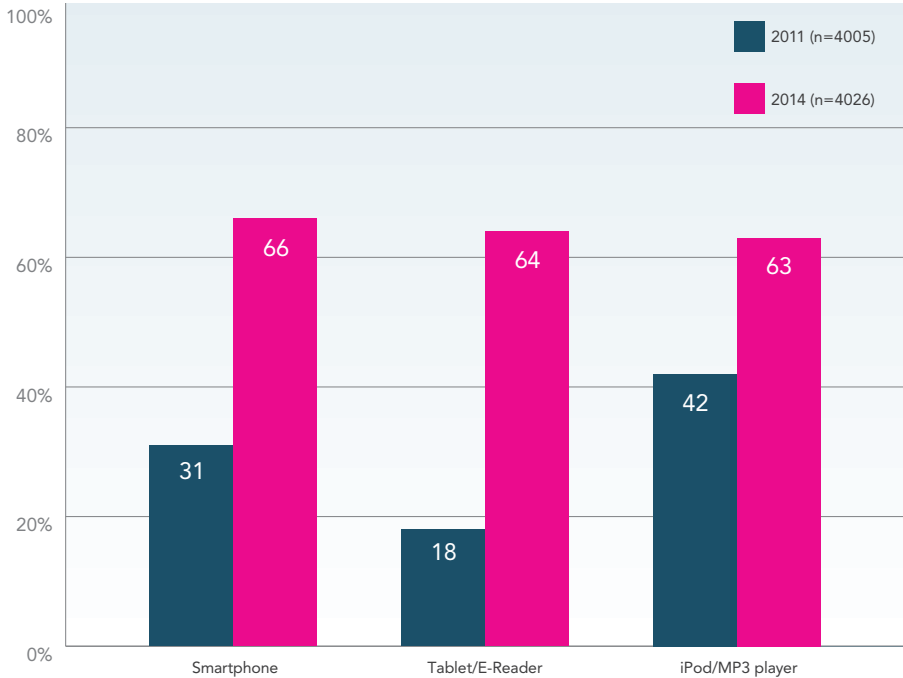
Selected Insights:

• Ownership of mobile devices has skyrocketed since 2011.

5. ENHANCING THE CULTURAL EXPERIENCE

5.5 MOBILE DEVICE USE ON-SITE

Question: Have you used the following mobile devices on-site?

Legend: 2014 (n=4026)

Device	%
Smartphone	20
E-reader or tablet	10
iPod/MP3 player	7
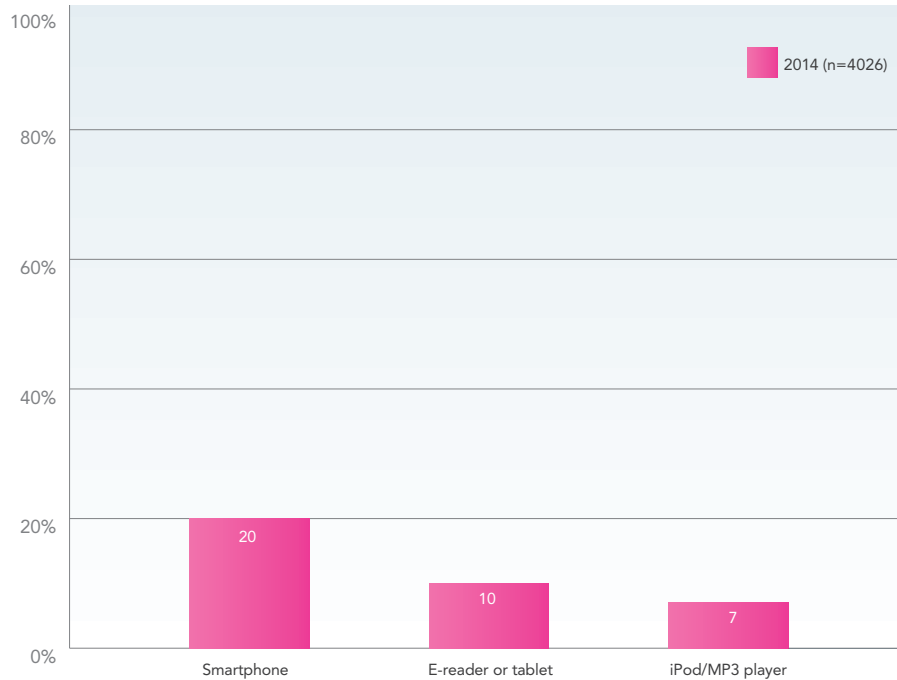
Selected Findings:

• Despite the fact that ownership of mobile devices has sharply increased, few respondents are using them on-site. This represents a transitional moment for cultural organizations, when mobile devices could soon become an integral part of the cultural experience, if organizations provide digital tools that speak to audiences' needs and desires (see pages 48 - 49).

• Of the mobile devices tested, respondents are most likely to have used their smartphone to enhance their experience at a cultural organization.

5. ENHANCING THE CULTURAL EXPERIENCE

5.6 MOBILE DEVICE ACTIVITIES ON-SITE

Question: During past visits to cultural organizations, have you ever used a mobile device for any of the following activities?

Legend: 2014 (n=1088)

Activity	Value
Taking photographs of the event or environment	68
Sharing photographs of the event or environment	47
Accessing the cultural organization's website	35
Conducting a search about an artist, school, movement or work	34
"Checking in" on a social media site	31
Logging into social media to read about or comment on the cultural event	24
Downloading or accessing the cultural organization's mobile app	15
None of the above	17

Selected Findings:

• Among those who have used a mobile device during their visits to cultural organizations, taking and sharing photos are the most popular activities.

• About a third have accessed the organization's website while on-site (35%), conducted a search about the artist, school, movement, or artwork (34%), or "checked in" on social media (31%).

5. ENHANCING THE CULTURAL EXPERIENCE

5.7 DESIRED FEATURES IN CULTURAL MOBILE APPS: OVERALL TRENDS

Question: Which resources or information would you find appealing in a mobile app from a cultural organization?

Legend: 2014 (n=4026)

Category	Value
"Behind-the-scenes" information	39
Ability to manage or buy tickets	36
Ability to design your own tour	25
Social media integration	16
Ability to upload your own photos and share them with the organization	15
Interacting with other visitors	12
None, I'd rather not use a mobile device while visiting	44
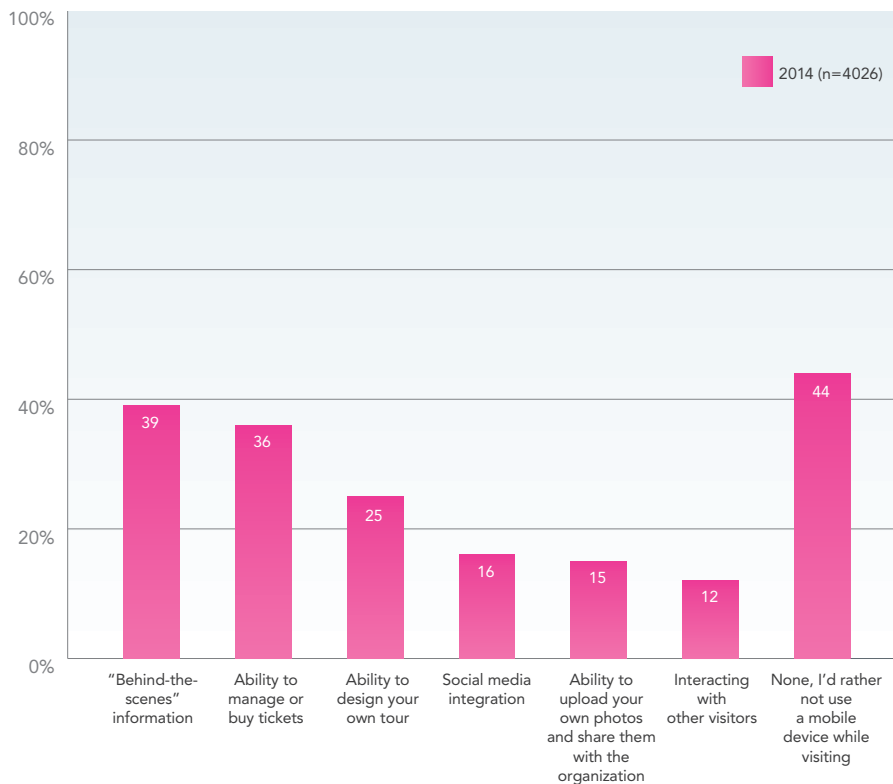
Selected Findings:

• Respondents would most like to see "behind-the-scenes" information (39%), but they also find the ability to manage or buy their tickets appealing (36%).

• 44% still prefer to enjoy a cultural experience without their mobile device, which could point to a desire to view cultural organizations as a respite from technology, or it could indicate a lack of interest in those on-site mobile device activities that they have experienced to date.

5. ENHANCING THE CULTURAL EXPERIENCE

5.8 DESIRED FEATURES IN CULTURAL MOBILE APPS: BY GENERATION

Question: Which resources or information would you find appealing in a mobile app from a cultural organization?

Legend:
- Millennials (n=680)
- Gen X (n=1203)
- Boomers (n=1803)
- Pre-War (n=340)

Category	Millennials	Gen X	Boomers
"Behind-the-scenes" Information	54	45	32
Ability to manage or buy tickets	50	44	30
Ability to design your own tour	35	33	19
Social Media Integration	32	20	9
Ability to upload your own photos and share them with the organization	29	19	8
Interacting with other visitors	23	14	8
None. I'd rather not use a mobile device while visiting	22	32	56
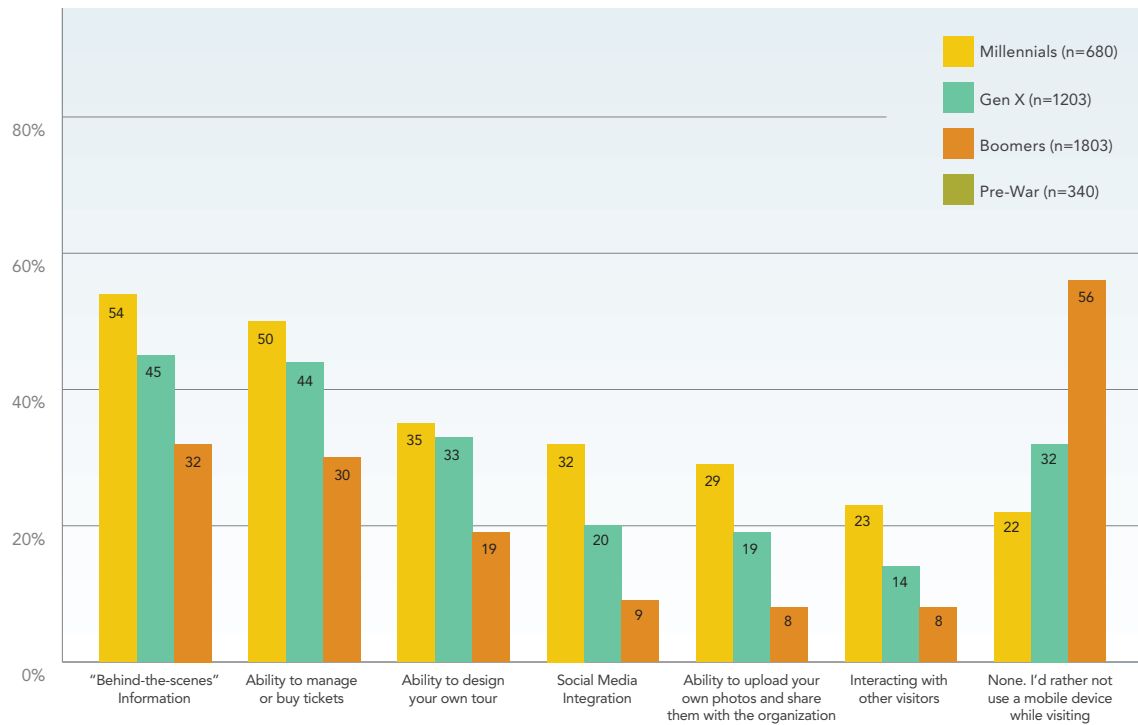
Selected Findings:

• Millennials and Gen X are the early adopters of all things mobile, showing the greatest interest in all of the features.

5. ENHANCING THE CULTURAL EXPERIENCE

5.9 EFFECT OF INTEGRATED TECHNOLOGY ON INTEREST

Question: Do you feel that cultural activities that use integrated technology (such as electronic kiosks, interactive games, and video clips) are more or less interesting than those that do not?
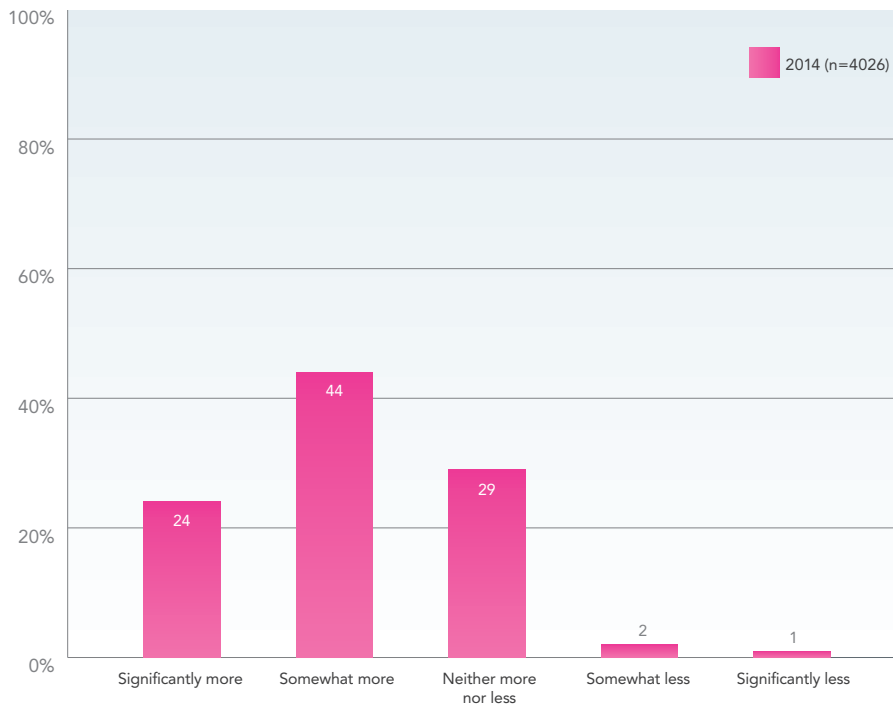
Selected Findings:

• The vast majority of respondents who have used mobile technology while at a cultural event or organization feel that integrated technology makes the activities more interesting (68%).

• Very few feel that integrated technology makes the activity less interesting.

6. VISUAL ARTS PARTICIPATION

6. VISUAL ARTS PARTICIPATION

6.1 ATTENDANCE PATTERNS

Question: Please tell us how often you participate in the following cultural activities.

Legend:
- Rarely or Never
- About once per year
- About several times per year
- Monthly or more

(n=4026)

Art galleries: 45, 32, 18, 5
Art museum: 40, 36, 19, 4
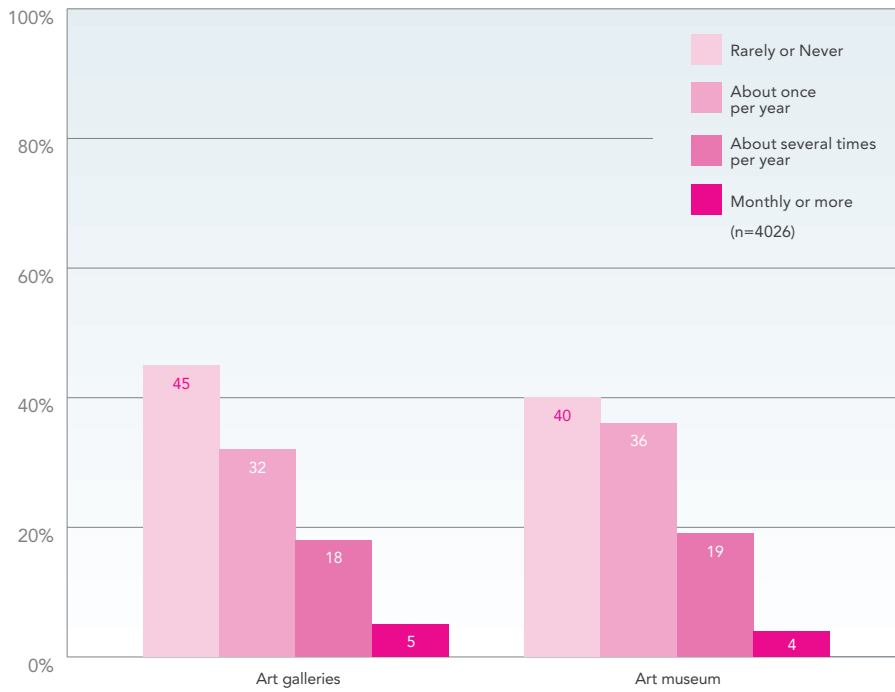
Selected Findings:

• A third of the respondents visit art galleries and museums about once a year, while two in ten visit several times a year.

6. VISUAL ARTS PARTICIPATION

6.2 ATTENDANCE PLANNING

Question: When do you typically decide to go to art museums or visual arts organizations?
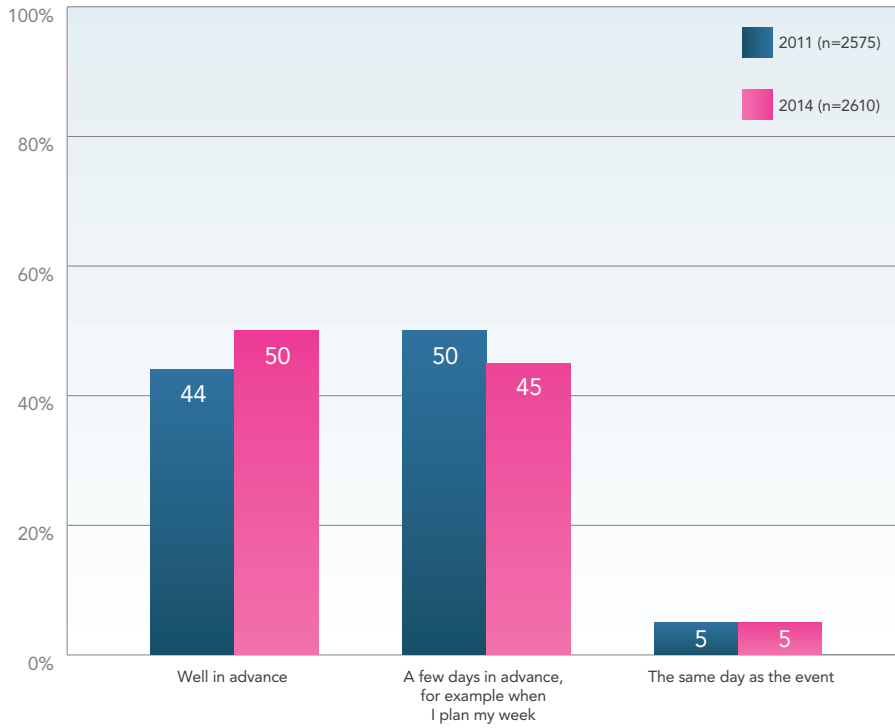
Selected Findings:

• Advance planning is on the rise for visual arts attendees.

Note: Those who visit art galleries or art museums "rarely or never" (see page 53) were not asked this question.

6. VISUAL ARTS PARTICIPATION

6.3 MEMBERSHIP

Question: Are you a member of any art museums or other visual arts organizations? If so, how many memberships do you currently hold?

Legend:
- 2011 (n=2575)
- 2014 (n=2610)

Category	2011	2014
Yes, many (more than five)	4	1
Yes, some (three to five)	6	3
Yes, one or two	16	11
None	74	85
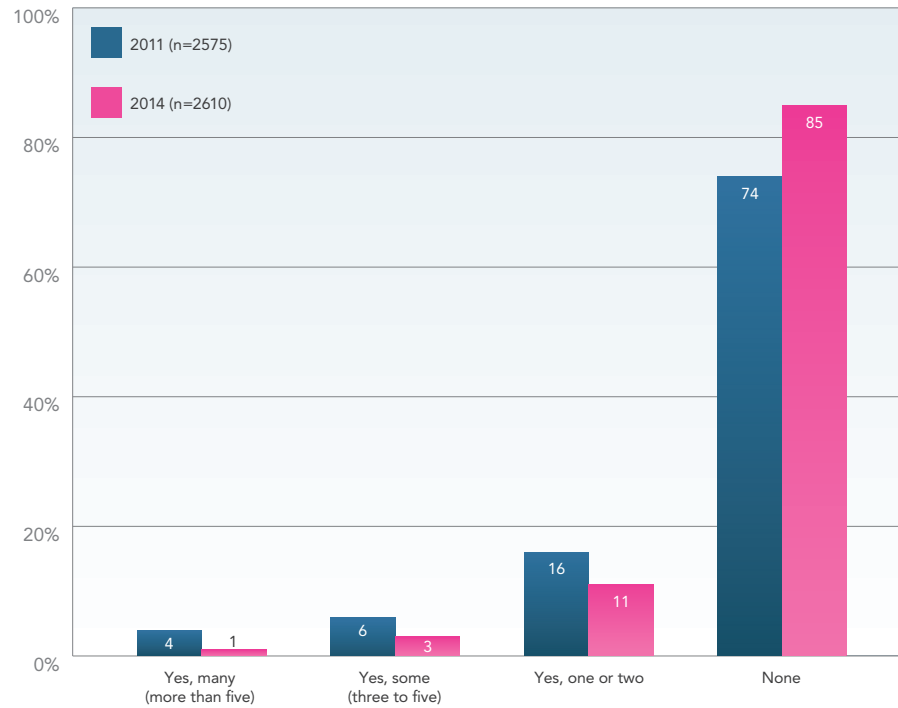
Selected Findings:

• The percentage of respondents who currently hold memberships to visual arts organizations has decreased from 26% in 2011 to 15% in 2014.

• Five in six visual arts respondents (85%) do not belong to a visual arts organization. One in ten (11%) belong to one or two organizations.

• For 2014, respondents who are not currently visual arts members were allowed to note if they had been members in the past. Of the 85% who are not currently members, 24% have been members in the past and 61% have never been members.

Note: Those who visit art galleries or art museums "rarely or never" (see page 53) were not asked this question.

6. VISUAL ARTS PARTICIPATION

6.4 MEMBERSHIP MOTIVATIONS FOR CURRENT MEMBERS

Question: What influences or motivates you to purchase or renew memberships to art museums or other visual arts organizations?

Desire to support organizations I like — 2011: 45, 2014: 47
It's less expensive than purchasing individual tickets — 2011: 43, 2014: 42
Discounts on parking, merchandise and in the cafe — 2011: 35, 2014: 37
It gets me out to see cultural events I might not otherwise see — 2011: 39, 2014: 36
I don't have to stand in the ticket line — 2011: 32, 2014: 35
Interest in temporary or special exhibitions — 2011: 42, 2014: 35
Members-only events — 2011: 40, 2014: 35
Convenience — 2011: 34, 2014: 31
Promotions/mailings from the organization — 2011: 33, 2014: 30
Interest in the permanent collection — 2011: 38, 2014: 23
Tax deductibility — 2011: 21, 2014: 19
Stature/reputation of the organization — 2011: 26, 2014: 15
It's social — 2011: 32, 2014: 14
Advertisements — 2011: 22, 2014: 8

2011 (n=670)
2014 (n=1016)

6. VISUAL ARTS PARTICIPATION

6.4 MEMBERSHIP MOTIVATIONS FOR CURRENT MEMBERS (CONT'D)

Selected Findings:

• The desire to support organizations that one likes remains the highest motivator for purchasing or renewing memberships.

• The next most influential factors relate to value, highlighting that memberships are less expensive than purchasing individual tickets, and provide discounts on parking, merchandise and in the café.

• Interest in the permanent collection has dropped substantially, and interest in temporary/special exhibitions has decreased a bit as well.

• Notably, access to exclusive events, and social motivations—factors often thought to be crucial components of loyalty models—have decreased.

6. VISUAL ARTS PARTICIPATION

6.5 MEMBERSHIP MOTIVATIONS FOR NON-MEMBERS

Question: Given that you do not currently have a membership to an art museum or other visual arts organization, what would make you more inclined to purchase one?
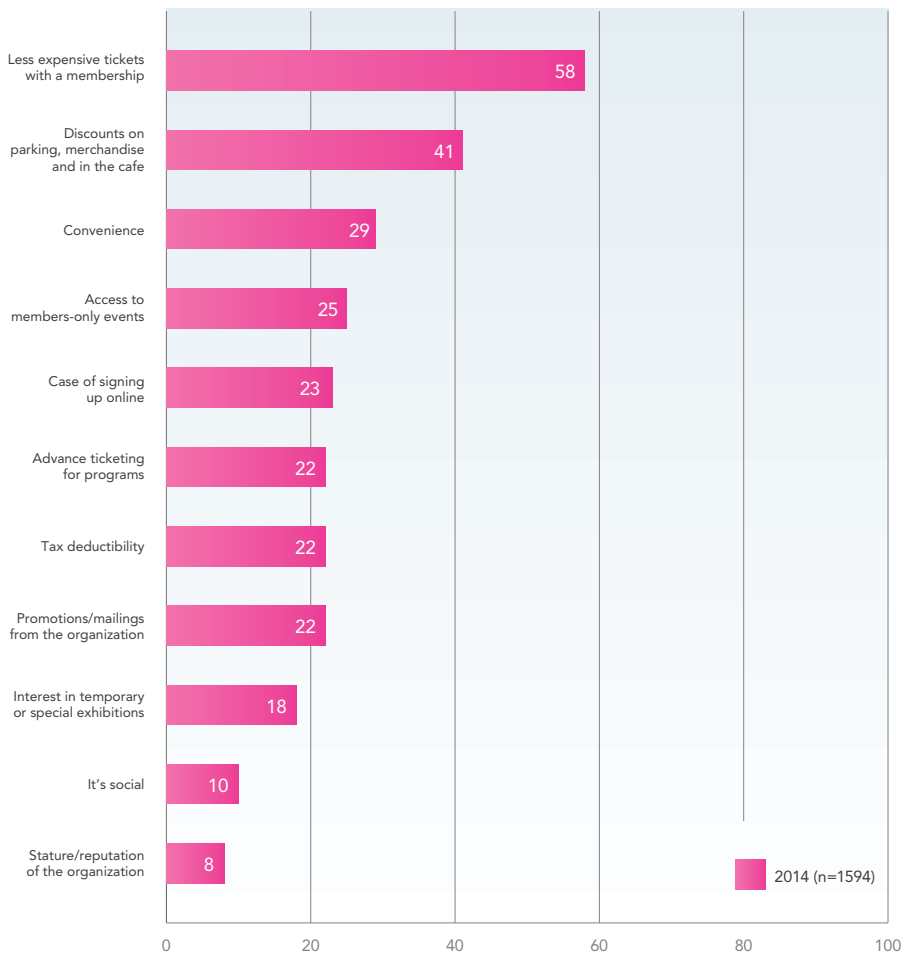
Motivation	Value
Less expensive tickets with a membership	58
Discounts on parking, merchandise and in the cafe	41
Convenience	29
Access to members-only events	25
Case of signing up online	23
Advance ticketing for programs	22
Tax deductibility	22
Promotions/mailings from the organization	22
Interest in temporary or special exhibitions	18
It's social	10
Stature/reputation of the organization	8

2014 (n=1594)

Note: This question was newly introduced in 2014.

6. VISUAL ARTS PARTICIPATION

6.5 MEMBERSHIP MOTIVATIONS FOR NON-MEMBERS (CONT'D)

Selected Findings:

• For the most part, non-members are motivated to consider joining by the same factors and to the same degree as members. The one exception is that membership is less expensive than purchasing individual tickets—this is a motivating factor for 58% of non-members vs. 42% of members.

• Items that are less motivating for non-members compared to members include access to members-only events (25% for non-members vs. 35% for members) and interest in temporary special exhibitions (18% for non-members vs. 35% for members).

Note: Those who visit art galleries or art museums "rarely or never" (see page 53) were not asked this question.

6. VISUAL ARTS PARTICIPATION

6.6 ACCESSING VISUAL ARTS COLLECTIONS ONLINE: OVERALL PATTERNS

Question: Have you ever accessed a visual arts museum's online collection?
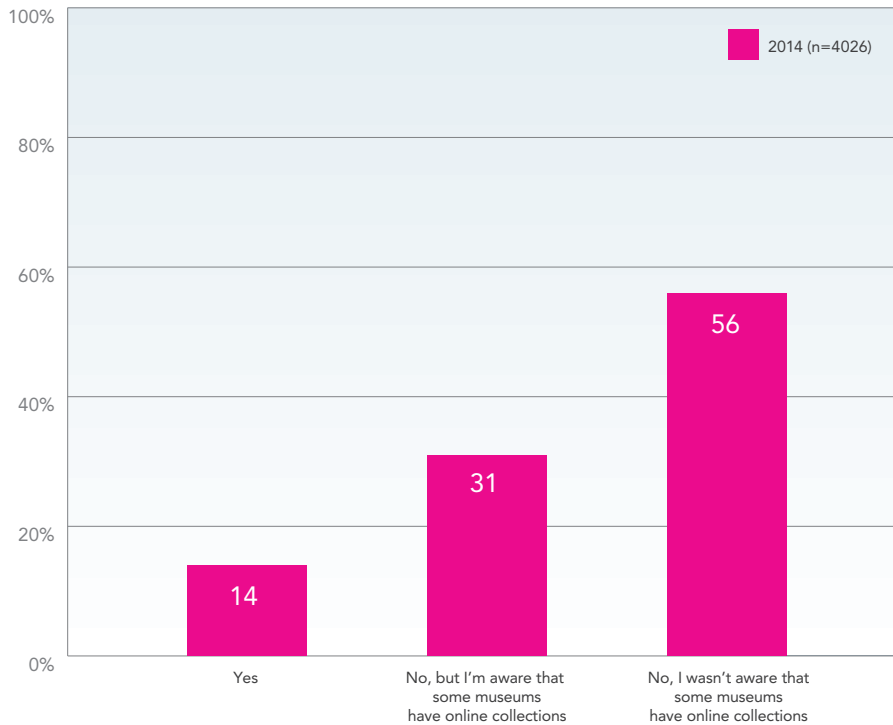
Selected Findings:

- Over half of the respondents are not aware that some visual arts organizations have online collections (56%). (This question was asked of all respondents, regardless of whether they had been to a visual arts organization.)

- One in seven (14%) have accessed an online collection. Of those who have visited an online collection, one in ten have never or rarely visited art galleries or art museums (11%).

6. VISUAL ARTS PARTICIPATION

6.7 ACCESSING VISUAL ARTS COLLECTIONS ONLINE: BY FREQUENCY OF PARTICIPATION

Question: Have you ever accessed a visual arts museum's online collection?

Legend:
- None (n=1215)
- 1 to 2 Events (n=2189)
- 3+Events (n=622)

Category	None	1 to 2 Events	3+ Events
Yes	4	14	29
No, but I'm aware that some museums have online collections	24	33	35
No, I wasn't aware that some museums have online collections	72	52	36
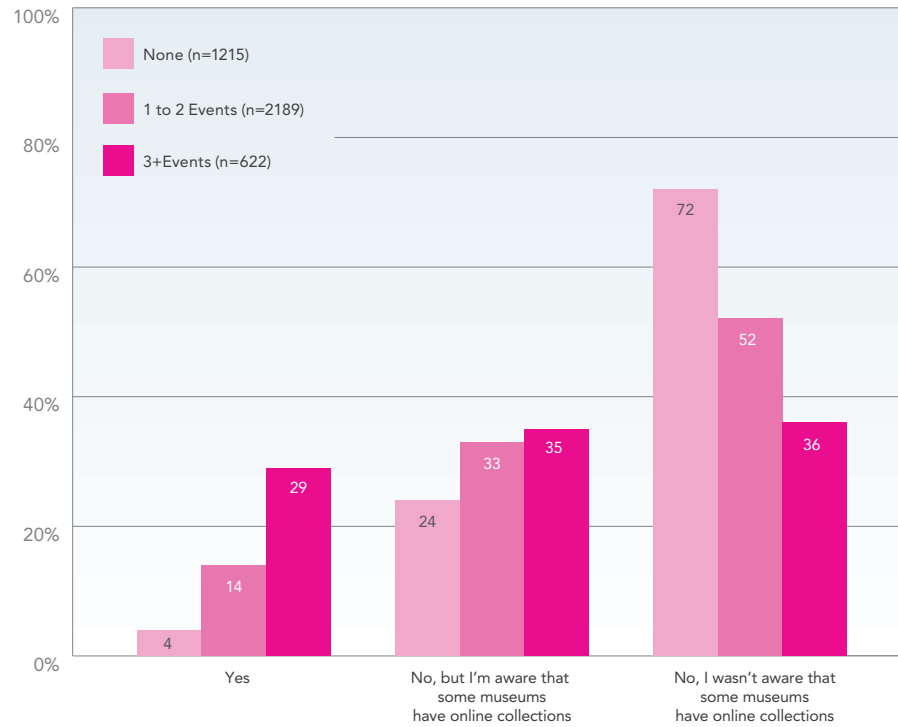
Selected Findings:

• The more active the respondents are, the more likely they are to have accessed a visual arts museum's online collection.

6. VISUAL ARTS PARTICIPATION

6.8 ONLINE COLLECTION PREFERENCES

Question: In regard to exploring visual arts museums' online collections, which of the following are you interested in?

Category	%
Experience a museum collection that I cannot access due to location	64
View a work of art in great detail	57
Access more in-depth information related to the collection	48
Have a cultural experience without having to leave my home	45
Experience a museum collection that I cannot visit due to scheduling	45
Have an inexpensive cultural experience	44
View exclusive "behind-the-scenes" material	42
Enjoy a museum collection by myself	42
Experience online "exhibitions" created by museum experts	36
Recommendations of similar artworks I might enjoy	25
Access recommendations for additional sources for further related information	21
Experience online "exhibitions" created by online visitors to the website	15
Connect with other participants via social media integration	8
Create and share my own online collection of my favorite artworks	7
Other, please specify	2
None	3

2014 (n=546)

Selected Findings:

• Respondents who have visited online art collections are most interested in the access they provide to art that is not normally available to them due to location (64%), followed by the ability to see the work in greater detail (57%).

• They are least interested in the social components that an online collection can provide (e.g., sharing their own art, connecting via social media).

7. PERFORMING ARTS PARTICIPATION

7. PERFORMING ARTS PARTICIPATION

7.1 ATTENDANCE PATTERNS

Question: Please tell us how often you participate in the following cultural activities.

Legend:
- Rarely or never
- About once per year
- About several times per year
- Monthly or more

(n=4026)

Data values by category:

Category	Rarely or never	About once per year	About several times per year	Monthly or more
Opera	85	10	3	1
Classical Dance	82	12	4	1
Modern Dance	78	12	6	3
Jazz Music	62	18	12	7
Classical Music	57	20	12	11
Dramatic Theater	52	26	17	4
Musical Theater	48	29	18	5
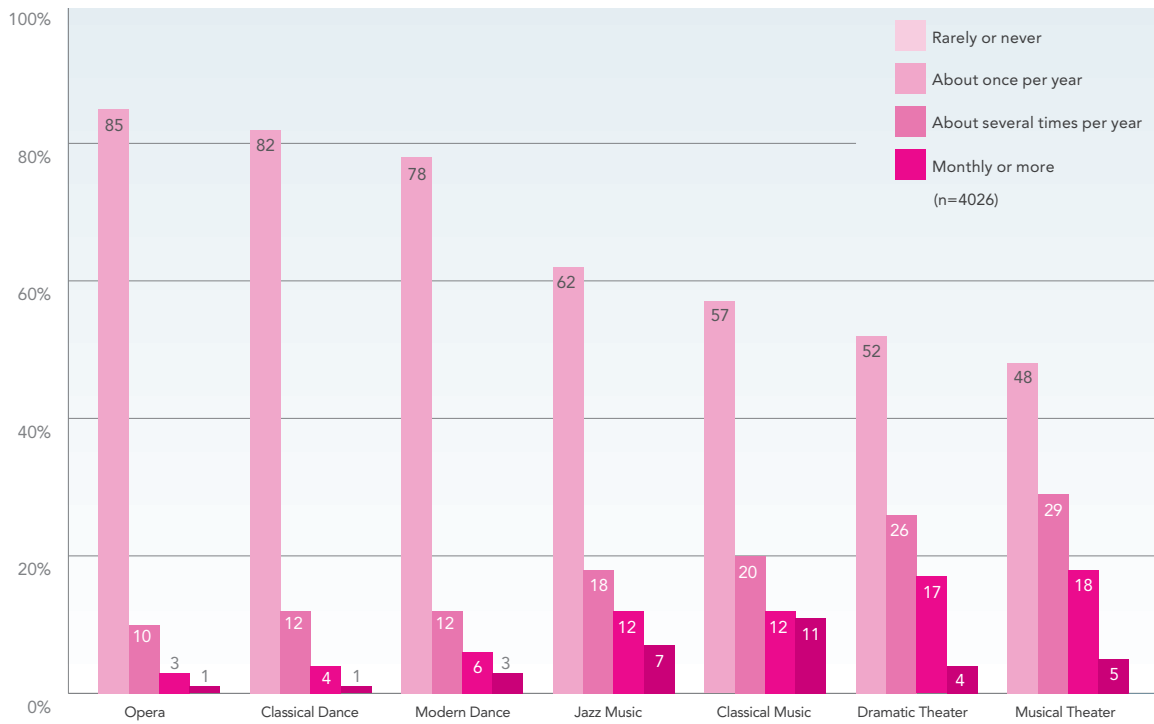
Selected Findings:

• The vast majority of respondents attend a performing arts event less than once per year.

• Dramatic theater and musical theater are the most attended performing arts—roughly half of the respondents attend musical theater (52%) and dramatic theater (47%) at least once a year.

• About two in five attend jazz music (37%) and classical music (43%) events once a year.

7. PERFORMING ARTS PARTICIPATION

7.2 ATTENDANCE PLANNING

Question: When do you typically decide to go to a performing arts event?

Legend:
- 2011 (n=3152)
- 2014 (n=2987)

	Well in advance	A few days in advance, for example when I plan my week	The same day as the event
2011	62	35	3
2014	72	24	3
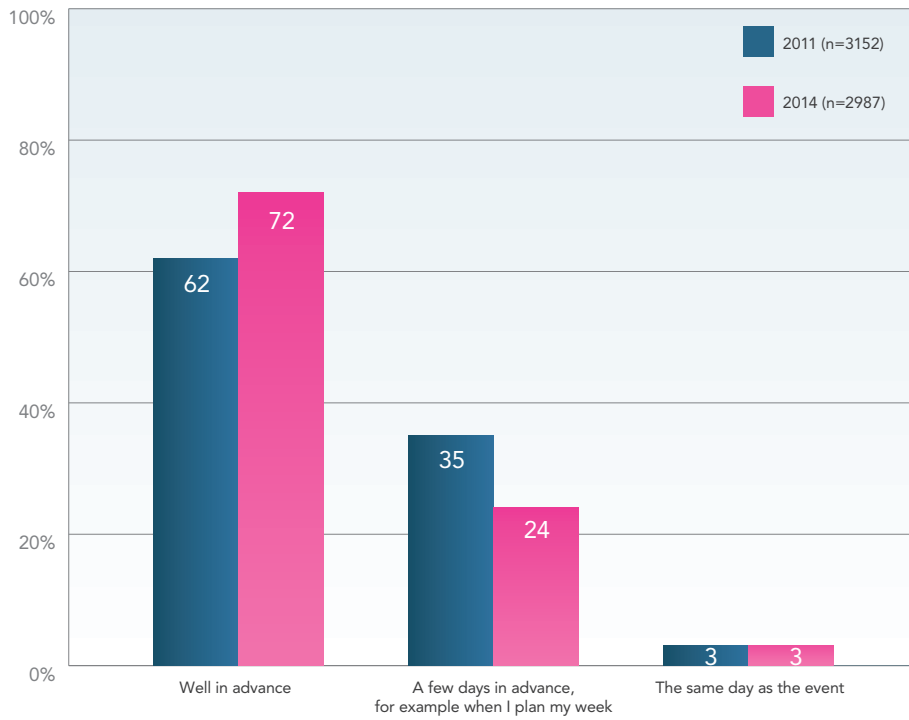
Selected Findings:

• Advance planning is on the rise for performing arts attendees, much more so than for the visual arts.

Note: Those who visit performing arts organizations "rarely or never" (see page 64) were not asked this question.

7. PERFORMING ARTS PARTICIPATION

7.3 SUBSCRIPTION

Question: Do you currently hold subscriptions for any performing organizations? If so, how many subscriptions do you currently hold?

Legend:
- 2011 (n=3152)
- 2014 (n=2987)

Category	2011	2014
Yes, many (more than five)	4	1
Yes, several (three to five)	6	1
Yes, one or two	13	8
None	78	90
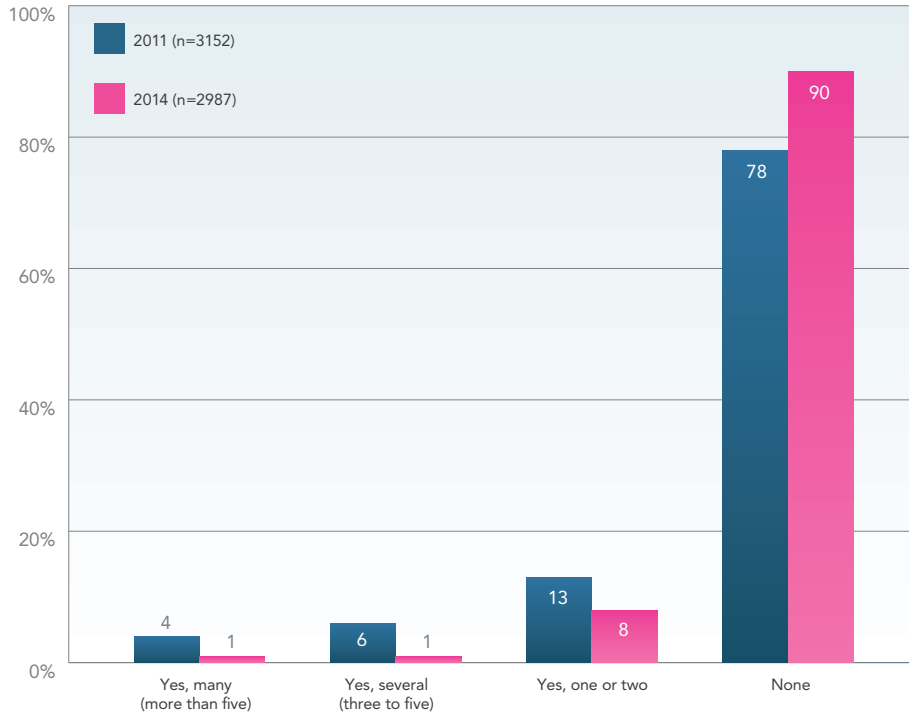
Selected Findings:

• Subscriptions to performing arts organizations have decreased from 22% to 10%. Now, only one in ten performing arts attendees (90%) have a subscription to a performing arts organization.

• For 2014, respondents who are not currently performing arts subscribers were allowed to note if they had been subscribers in the past. Of the 90% who are not currently subscribers, 21% have been subscribers in the past and 69% have never been subscribers.

Note: Those who visit performing arts organizations "rarely or never" (see page 64) were not asked this question.

7. PERFORMING ARTS PARTICIPATION

7.4 SUBSCRIPTION MOTIVATIONS FOR CURRENT SUBSCRIBERS

Question: What influences or motivates you to purchase or renew subscriptions to performing organizations?

Motivation	2011 (n=694)	2014 (n=919)
Tickets are less expensive when you buy a package	53	53
Interest in the type of performance	56	52
Desire to support local arts organizations and local artists	39	41
It gets me out to see performing arts events I might not otherwise attend	43	41
Convenience	39	34
The specific programming listed in their season brochure	33	34
Subscribing provides me the best seats	32	32
I can be more flexible with my plans when I buy a subscription	35	26
Subscribers-only events	27	19
Social	35	16
Stature/reputation of the organization	24	16
Simplifies my planning	29	11

Selected Findings:

• The majority of the top motivations for current performing arts subscribers to purchase or renew have not shifted much since 2011. Value and content continue to serve as the primary motivations.

• Subscribers-only events and social motivations have declined, mirroring trends for visual arts membership motivations.

• The substantial decline in simplifying planning suggests that subscribers might prefer to customize their own experience, rather than have it prescribed for them.

Note: Those who visit performing arts organizations "rarely or never" (see page 64) were not asked this question.

7. PERFORMING ARTS PARTICIPATION

7.5 SUBSCRIPTION MOTIVATIONS FOR NON-SUBSCRIBERS

Question: Given that you do not currently have a subscription to a performing arts organization, what would make you more inclined to purchase one?

Category	Value
Less expensive tickets are available when you buy a subscription	54
Interest in the type of performance	41
Convenience	33
Better quality seating	31
Desired programming listed in their season brochure	18
Access to subscriber-only receptions and social events	17
If any of my friends or family members subscribed	15
More flexibility in planning when I buy a subscription	14
Stature/reputation of the organization	7
Simplification of planning	5

2014 (n=2069)
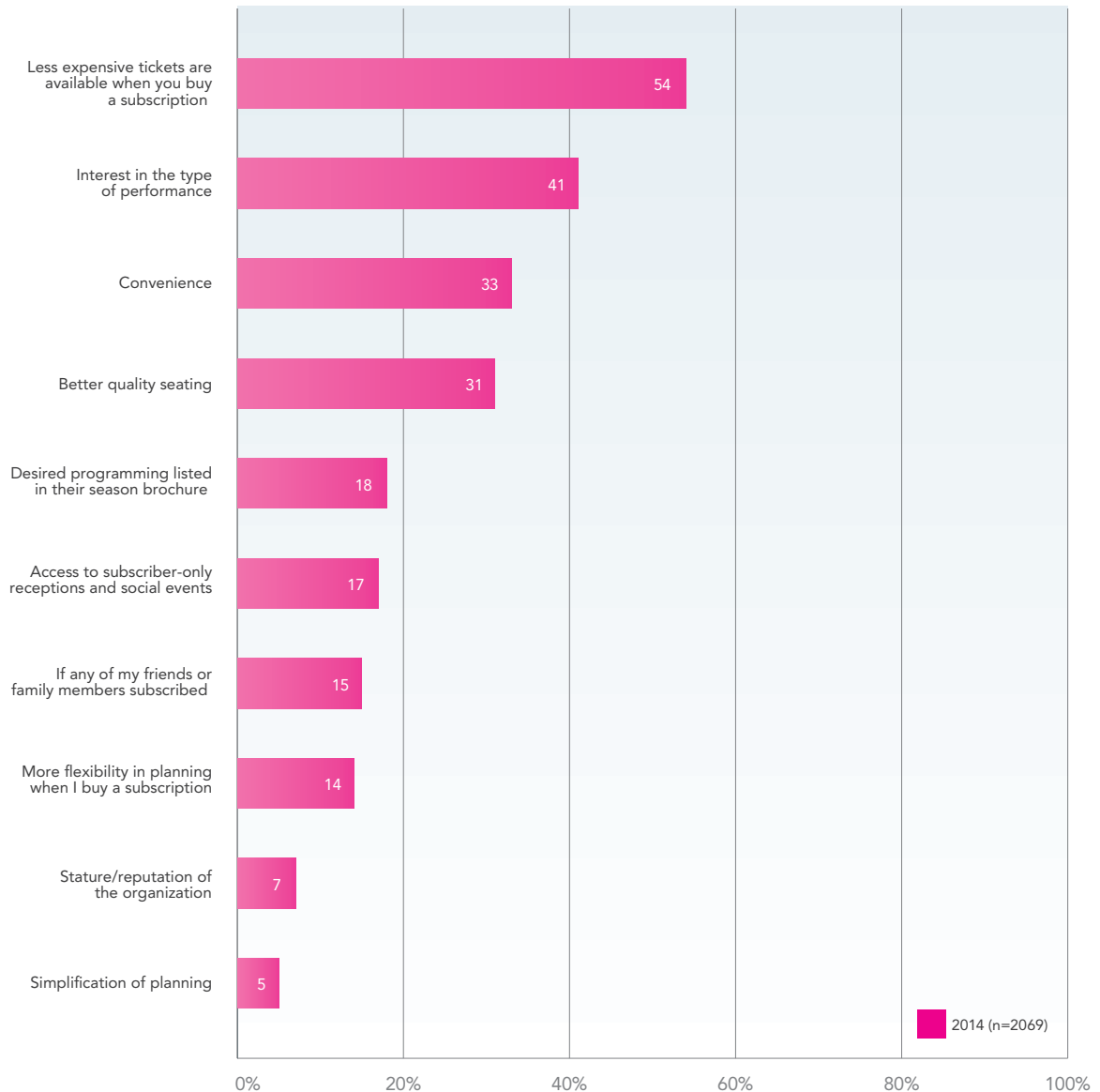
Note: This question was newly introduced in 2014.

7. PERFORMING ARTS PARTICIPATION

7.5 SUBSCRIPTION MOTIVATIONS FOR NON-SUBSCRIBERS (CONT'D)

Selected Findings:

• Non-subscribers are like subscribers in that they are most motivated by less expensive individual tickets and interest in the type of performance.

• Non-subscribers are less motivated than current subscribers by the type of performance, specific programming, flexibility regarding planning, and simplified planning.

Note: Those who visit performing arts organizations "rarely or never" (see page 64) were not asked this question.

7. PERFORMING ARTS PARTICIPATION

7.6 EXPERIENCING THE PERFORMING ARTS ONLINE

Question: Please tell us whether you use the following online sources to experience performances by performing arts organizations.

Legend:
- Have Used
- Aware, but never used
- Never heard of it
- (n=4026)

Source	Have Used	Aware, but never used	Never heard of it
YouTube	79	19	2
Online performance archives	58	17	25
Live streaming from performing arts organizations	57	21	22
Pandora	55	31	13
Spotify	39	27	36
Vimeo	35	15	51
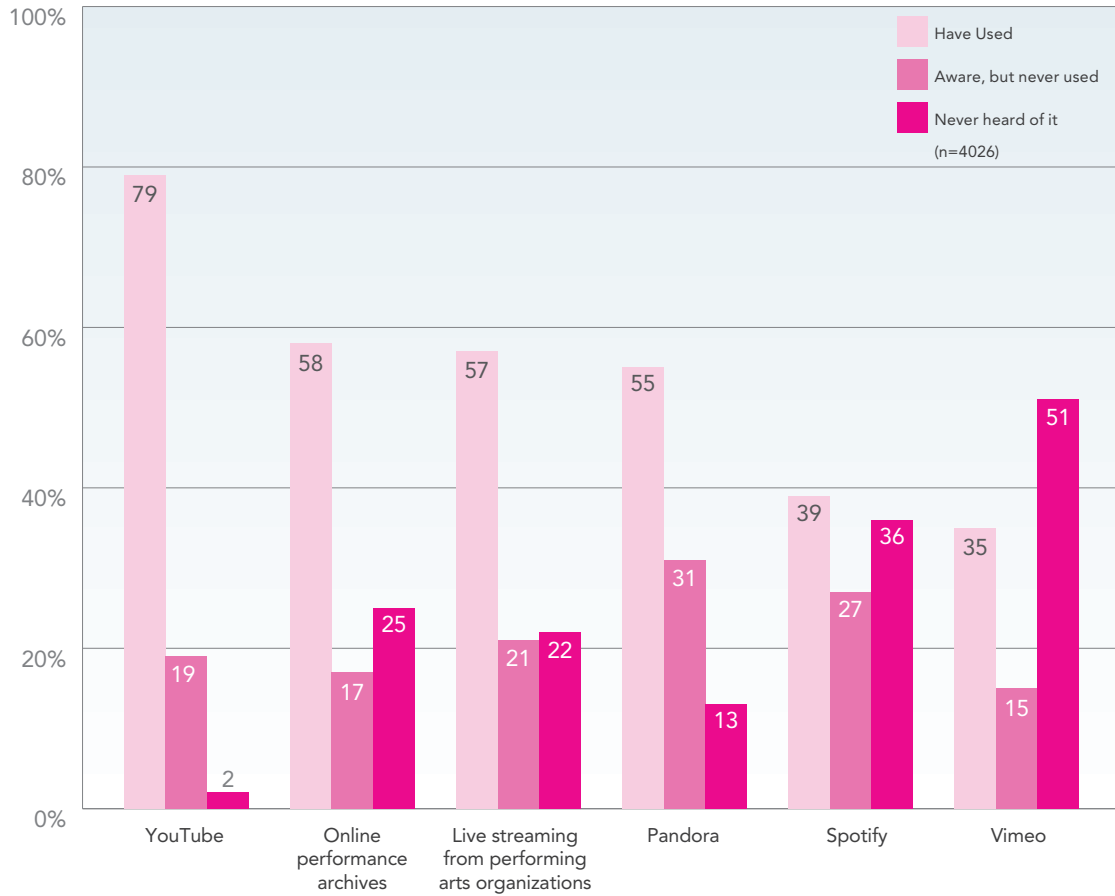
Selected Findings:

• Eight in ten respondents have used YouTube to experience performances from performing arts organizations (79%). The next most common source for online performances are archives (58%).

• On the other end of the spectrum, about half are not aware of Vimeo (51%).

7. PERFORMING ARTS PARTICIPATION

7.7 PREFERENCES FOR ONLINE PERFORMING ARTS EXPERIENCES

Question: Which of the following are you interested in with regard to experiencing the performing arts online?

Category	Value
Experience a performance that I cannot attend due to location	56
Have an inexpensive cultural experience	49
Experience a performance that I cannot attend due to scheduling	47
Have a cultural experience without having to leave my home	43
Enjoy a performance by myself	39
View exclusive "behind-the-scenes" material for narration	34
Recommendations for similar performances I might enjoy	27
Access a selection of further information related to the performance	23
Create and share a selection of my favorite performances	14
Connect with other participants via social media integration	6
Other	1
None	11

2014 (n=2354)

Selected Findings:

• Respondents who have viewed performances online are largely driven by the convenience and value that such experiences offer, and less by social factors.

8. NON-VISUAL ARTS MUSEUM PARTICIPATION

8. NON-VISUAL ARTS MUSEUM PARTICIPATION

8.1 ATTENDANCE PATTERNS

Question: Please tell us how often you participate in the following cultural activities.

Legend:
- Rarely or Never
- About once per year
- About several times per year
- Monthly or more
- (n=4026)

Children's museums: 69, 19, 9, 2
History museums: 28, 44, 22, 5
Science museums: 27, 46, 22, 4
Living museums: 18, 45, 30, 6
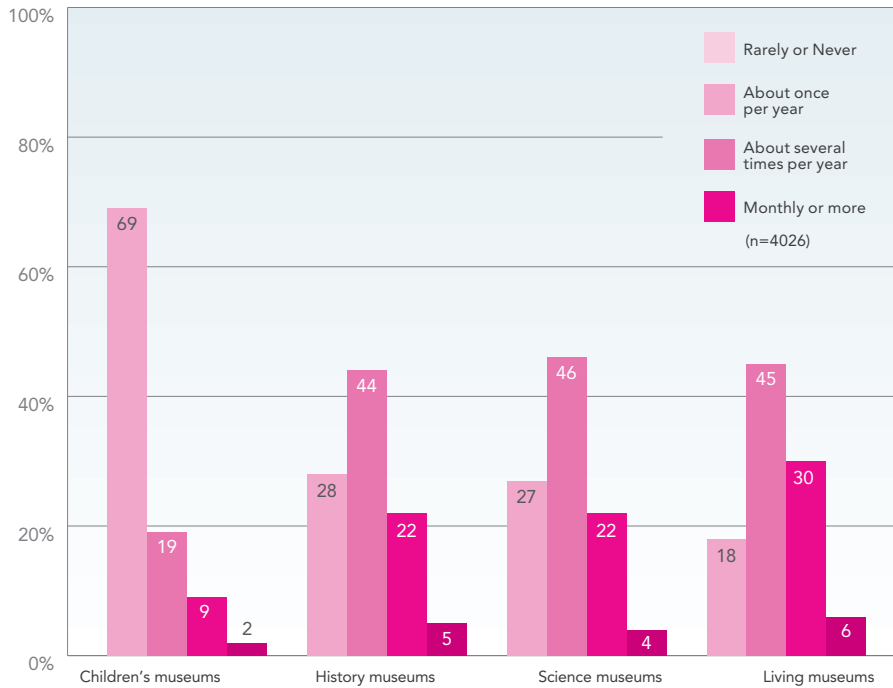
Selected Findings:

• Seven in ten respondents visit history museums (71%) and science museums (72%) at least once a year.

• Eight in ten visit living museums (81%) and three in ten (30%) visit children's museums at least once a year.

8. NON-VISUAL ARTS MUSEUM PARTICIPATION

8.2 MOTIVATORS FOR VISITING NON-VISUAL ARTS MUSEUMS

Question: What influences or motivates you to visit a non-visual arts museum?

Motivator	Value
I enjoy the subject matter	69
It entertains me	63
It is a relaxing activity	57
It's an easy way to spend leisure time	54
Exposes me to something new or interesting	48
It's a cost-effective way for me to spend my time	40
It's welcoming	37
I feel comfortable bringing children	29
My children enjoy it	28
The programming and events are exciting	26
Supporting an organization that's important to my community	25
It's social	19
It makes me feel "in the know"	12
Other	3

2014 (n=3544)

Selected Findings:

- Approximately seven in ten respondents (69%) visit non-art museums because they enjoy the subject matter, while roughly six in ten (63%) say they visit because it entertains them.

- As with visual and performing arts, social and exclusive factors are less motivating.

Note: Those who visit non-visual arts museums "rarely or never" (see page 73) were not asked this question.

8. NON-VISUAL ARTS MUSEUM PARTICIPATION

8.3 MEMBERSHIP

Question: Are you a member of any non-visual arts museums? If so, how many memberships do you currently hold?

Legend: 2014 (n=3544)

Category	Value
Yes, some (three to five)	1
Yes, one or two	10
I have been a member in the past, but not now	17
None	72
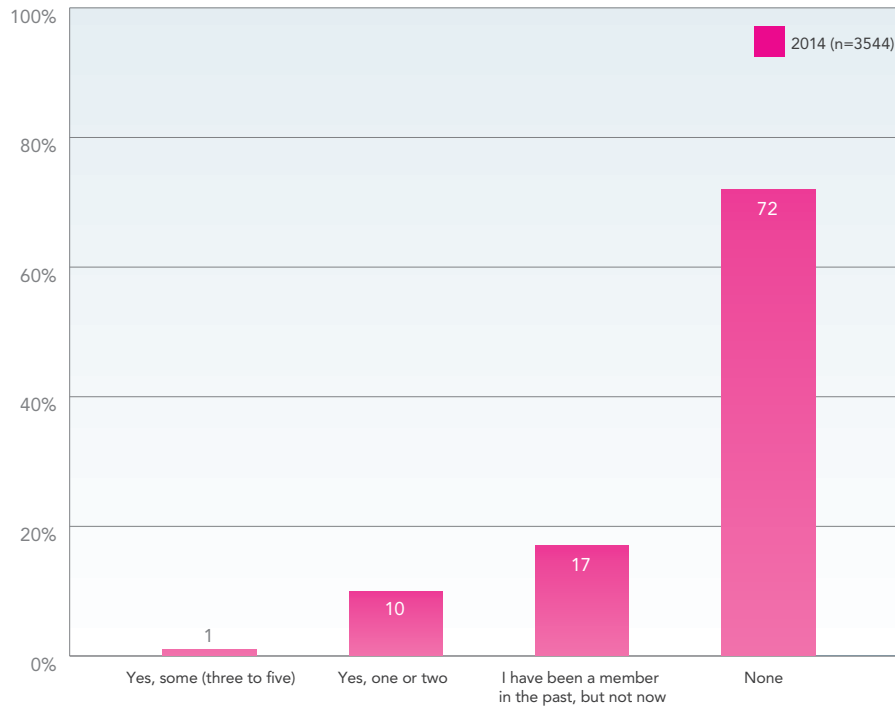
Selected Findings:

• More than seven in ten respondents (72%) have never been members of a non-visual arts museum.

Note: Those who visit non-visual arts museums "rarely or never" (see page 73) were not asked this question.

8. NON-VISUAL ARTS MUSEUM PARTICIPATION

8.4 MEMBERSHIP MOTIVATIONS FOR CURRENT MEMBERS

Question: What influences or motivates you to purchase or renew memberships to non-visual arts museums?

It's less expensive than purchasing individual tickets	51
Desire to support organizations I like	46
Access to members-only events	35
Convenience	32
My children enjoy it	31
Discounts on merchandise and in the café	29
Interest in the permanent collection	27
Promotions/mailings from the organization	25
It gets me out to see cultural events I might not otherwise see	25
Stature/reputation of the organization	19
Tax deductibility	15
It's social	13

2014 (n=1000)
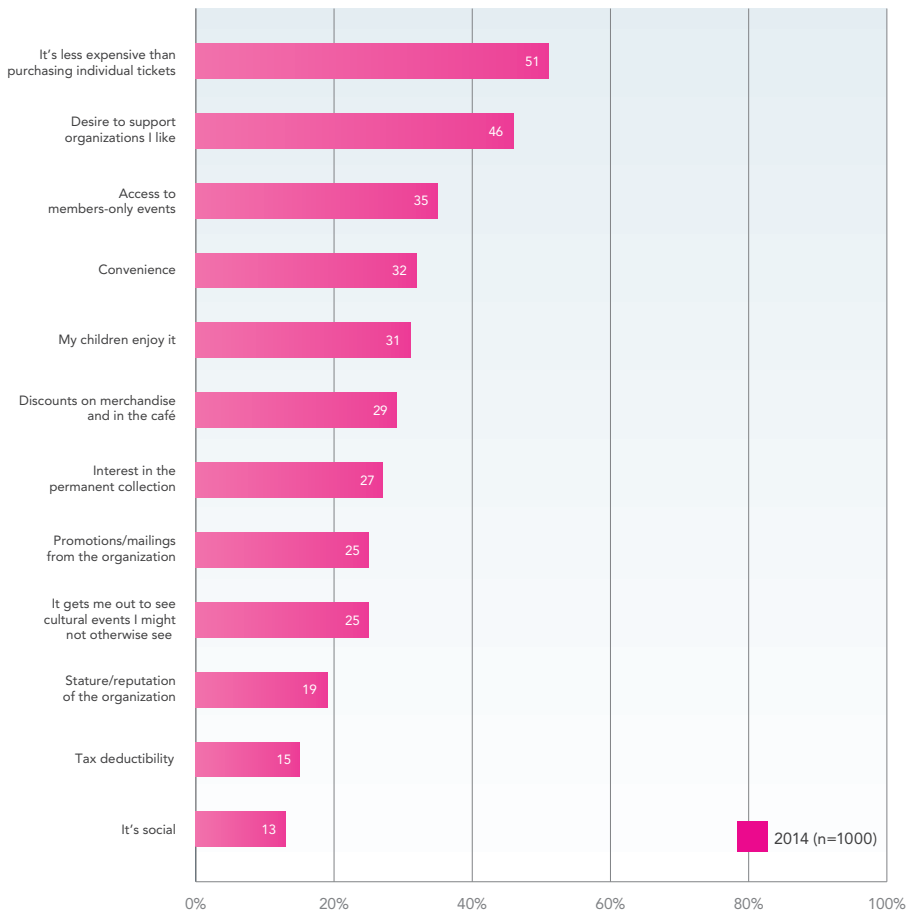
Selected Findings:

• As with visual arts and performing arts, respondents are most motivated to purchase or renew memberships to non-visual arts museums by cost benefits and a desire to support organizations they like. Social benefits again ranked quite low.

Note: Those who visit non-visual arts museums "rarely or never" (see page 73) were not asked this question.

9. ARTS PARTICIPATION COMPARISON

9. ARTS PARTICIPATION COMPARISON

9.1 ATTENDANCE PARTNERS

Question: With whom do you usually attend [organization type]?

Legend:
- Visual Arts (n=2610)
- Performing Arts (n=2987)
- Non-Visual Arts Museums (n=3544)

	With spouse or partner	With one or more friends	With other family members	With my children	Attend alone	With a social group (e.g., a Meetup or club)
Visual Arts	51	33	23	20	15	8
Performing Arts	44	27	19	13	10	6
Non-Visual Arts Museums	53	20	34	29	11	5
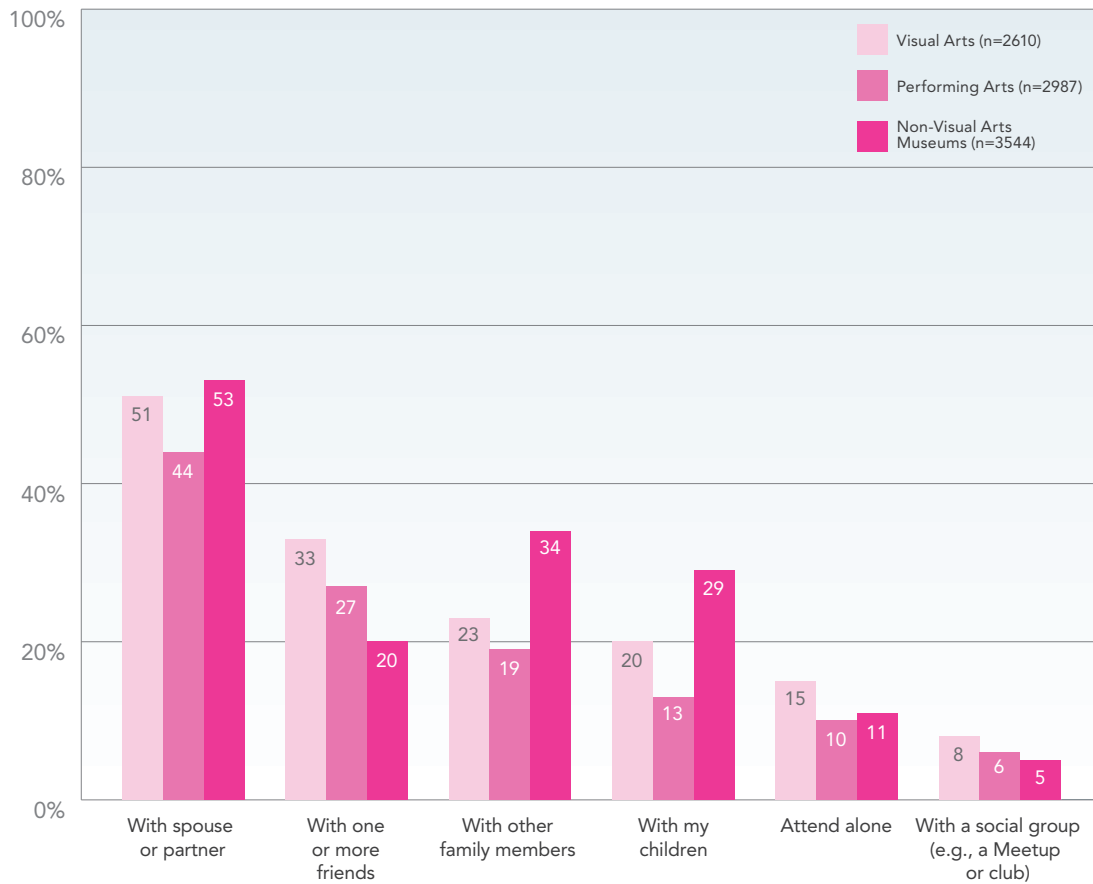
Selected Findings:

• Across all cultural organizations, respondents are most likely to attend with their spouse or partner.

• Those visiting non-visual arts museums are more likely than those attending visual arts museums or performing arts to go with children or other family members.

9. ARTS PARTICIPATION COMPARISON

9.2 ATTENDANCE PLANNING

Question: When do you typically decide to go to [organization type]?

Legend:
- Visual Arts (n=2610)
- Performing Arts (n=2987)
- Non-Visual Arts Museums (n=3544)

Chart data (percentages by category):

	Well in advance, a few months	Well in advance, a few weeks	A few days in advance, for example when I plan my week	The same day as the event
Visual Arts	9	41	45	5
Performing Arts	21	51	24	3
Non-Visual Arts Museums	9	32	48	11
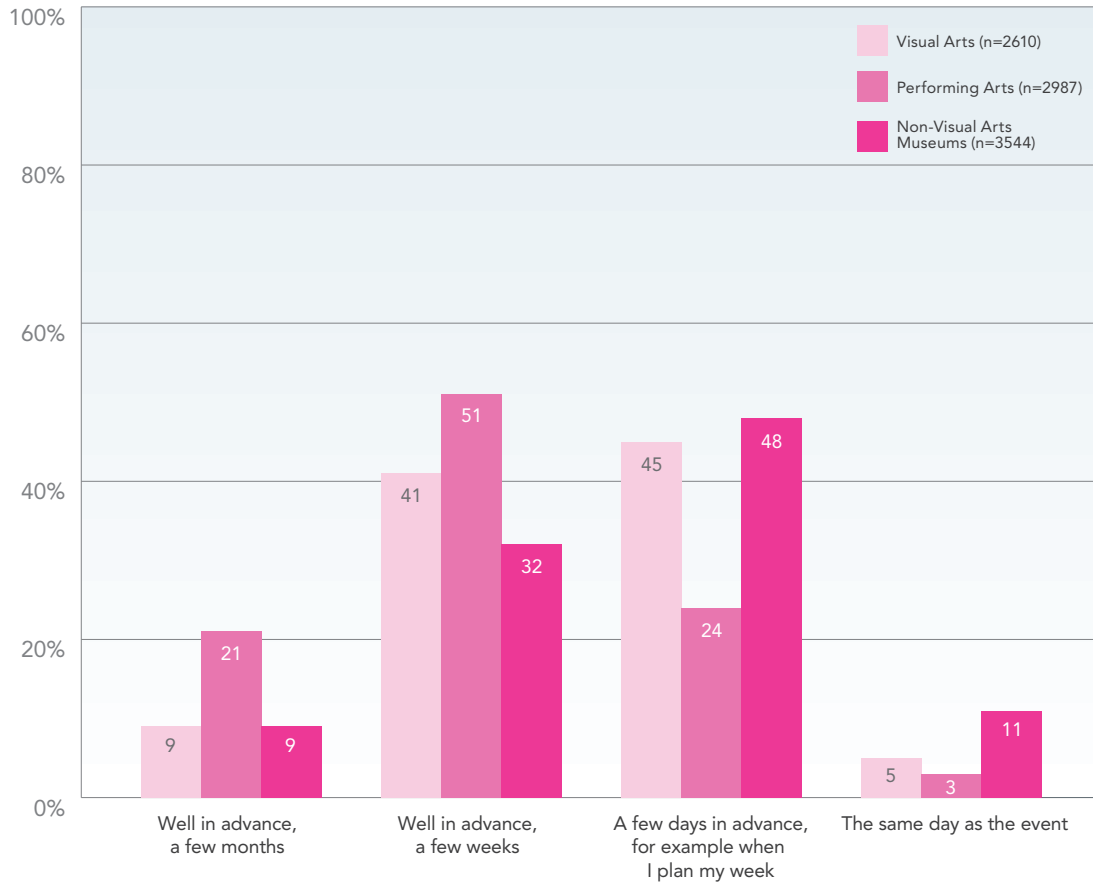
Selected Findings:

• Few cultural participants plan their activity on the same day of the event, regardless of the type of cultural activity.

• Those attending performing arts events are more likely to have planned their excursion well in advance, while those attending museums (visual arts and non-visual arts) are most likely to have planned a few days in advance.

9. ARTS PARTICIPATION COMPARISON

9.3 PREFERRED METHOD OF PURCHASE

Question: What is your preferred method of purchase for [organization type]?

Legend:
- Visual Arts (n=2610)
- Performing Arts (n=2987)
- Non-Visual Arts Museums (n=3544)

Online: 52, 65, 32
In person at the admission desk: 41, 25, 63
Telephone: 5, 8, 3
Mail: 2, 2, 1
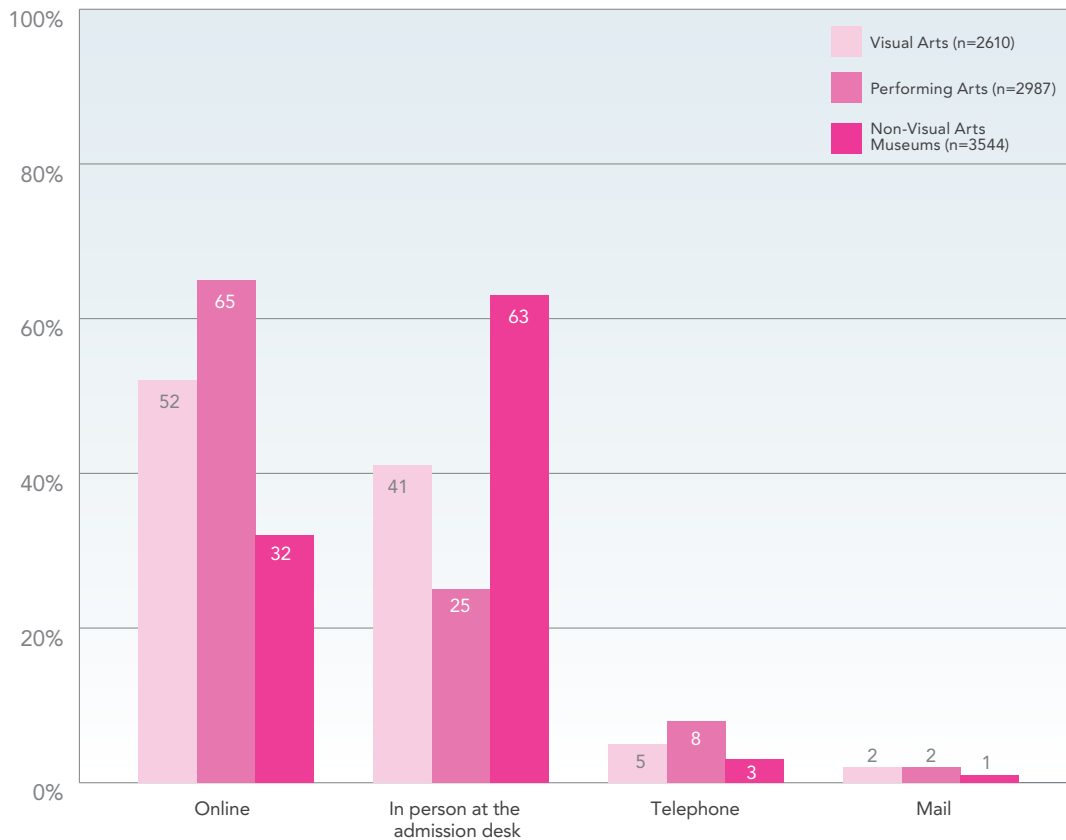
Selected Findings:

• Online ticket purchasing is the preferred option for those participating in visual arts or performing arts events.

• For those visiting non-visual arts museums, purchasing tickets in person is the preferred option.

9. ARTS PARTICIPATION COMPARISON

9.4 MEMBERSHIP / SUBSCRIPTION

Question: Do you currently hold memberships/subscriptions for any [organization type]?

Legend:
- Visual Arts (n=2610)
- Performing Arts (n=2987)
- Non-Visual Arts Museums (n=3544)

	Yes, many (more than five)	Yes, some (three to five)	Yes, one or two	I have been a member/subscriber in the past, but not now	None
Visual Arts	1	3	11	24	61
Performing Arts	1	1	8	21	69
Non-Visual Arts Museums	0	1	10	17	72
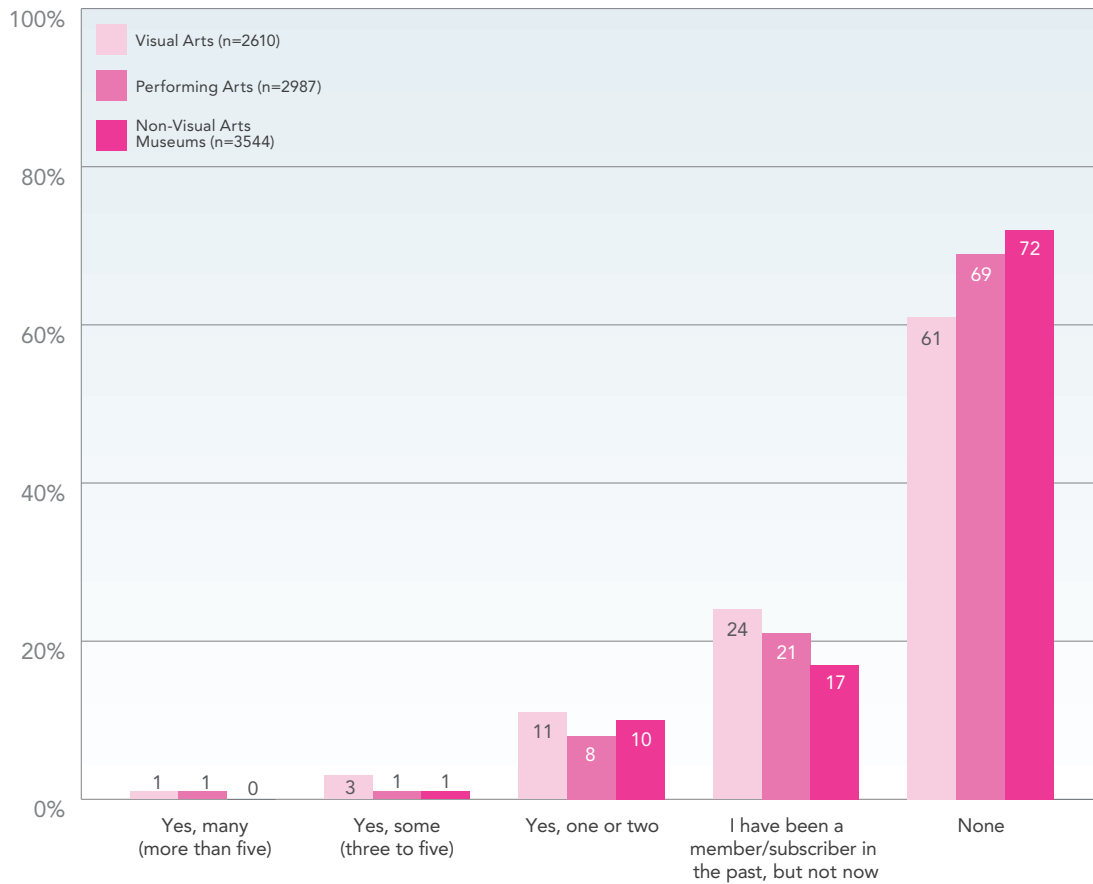
Selected Findings:

• The vast majority of respondents are not members or subscribers of any type of cultural organization.

10. CHARITABLE GIVING TO CULTURAL ORGANIZATIONS

10. CHARITABLE GIVING TO CULTURAL ORGANIZATIONS

10.1 CHARITABLE GIVING PLANS

Question: Do you plan on making charitable contributions to cultural organizations in the next year?

Legend:
- Yes, more than in 2013
- No, not this year or last year
- Yes, the same as in 2013
- No, but gave last year
- Yes, less than in 2013
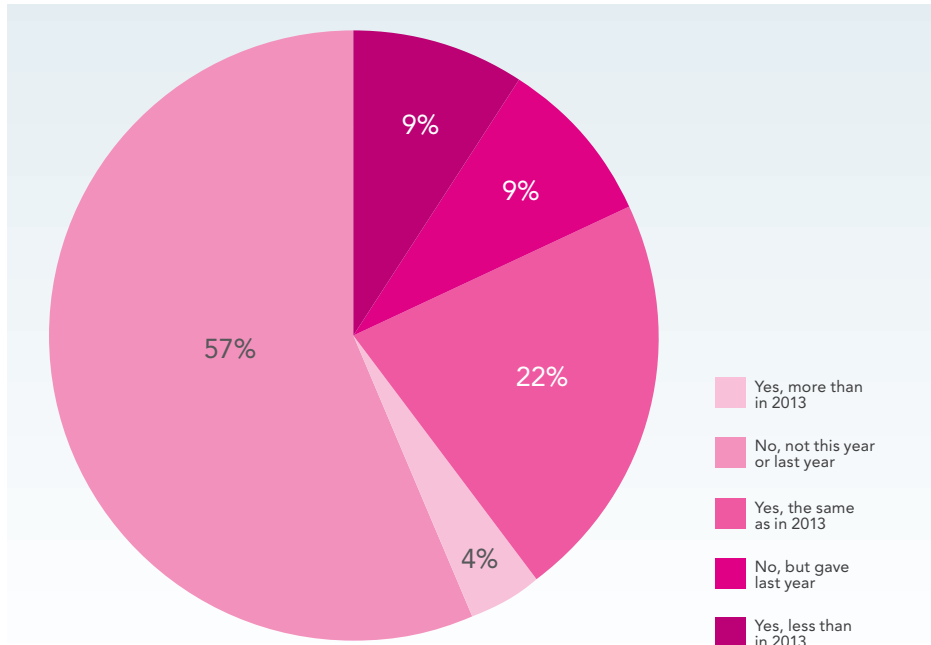
Selected Findings:

• Despite the economic downturn, charitable giving to cultural organizations is vibrant. Over a third of the respondents (35%) intend to make a charitable contribution this year, which is in line with 2011 (33%). Of those respondents, the majority will give the same amount they gave in 2013 (22%), and 4% will give more.

• Almost two-thirds (66%) of respondents do not intend to donate this year, and the vast majority of those (57%) did not donate in 2013.

10. CHARITABLE GIVING TO CULTURAL ORGANIZATIONS

10.2 MOTIVATIONS FOR CHARITABLE GIVING

Question: What motivates you to make charitable contributions to cultural organizations?

Legend:
- 2011 (n=1032)
- 2014 (n=1394)

Category	2011	2014
Supporting organization that benefits community	57	61
Supporting organization that I enjoy	53	59
Supporting the arts is important	51	48
Helping organization face funding challanges	45	46
Tax deductibility	32	35
Helping an organization achieve its potential	37	34
Benefits received in exchange for contribution	21	22
Leaving a legacy		8
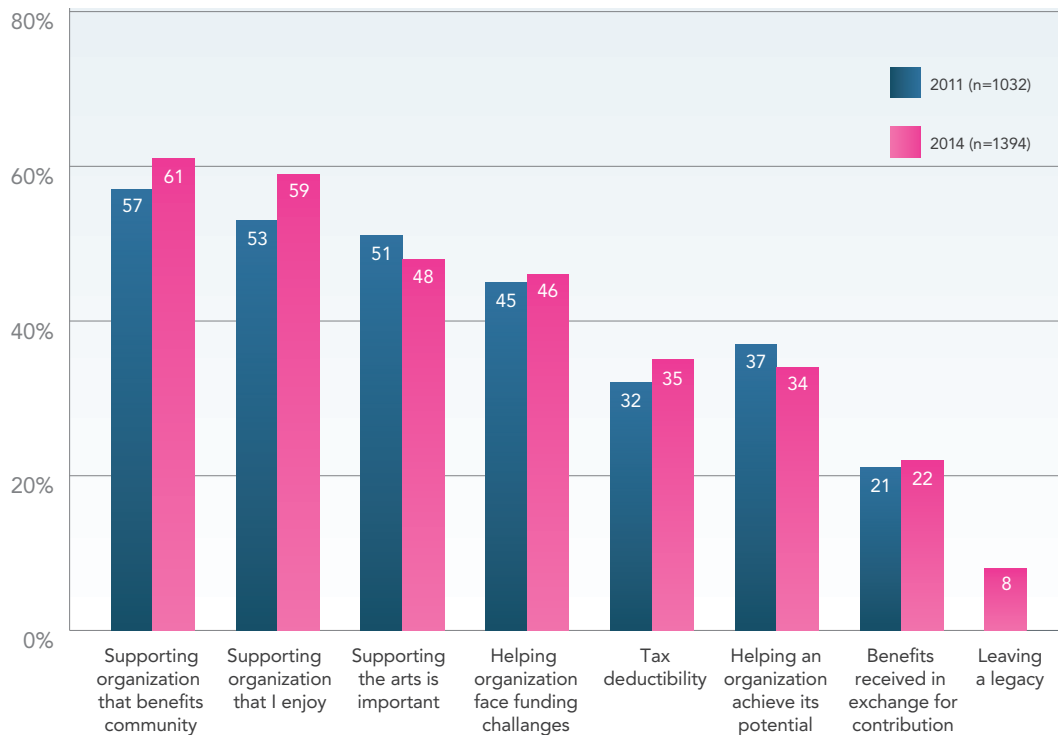
Selected Findings:

• Respondents are most driven to donate to cultural organizations in order to benefit the community (61%), as opposed to satisfying self-focused desires like tax deductibility, benefits received in exchange for contributions, or leaving a legacy.

• About half are motivated by a sense of personal connection: supporting an organization they enjoy (59%) and because supporting art is important to them (48%).

• Less than one in ten (8%) are motivated by the desire to leave a legacy.

Note: Leaving a legacy was a newly introduced option in 2014.

11. CORPORATE SPONSORSHIP

11. CORPORATE SPONSORSHIP

11.1 PERCEPTIONS OF CORPORATE SPONSORSHIP

Question: Please tell us if you agree with the following statements.

Legend:
- 2007 (n=3155)
- 2011 (n=4005)
- 2014 (n=4026)

	Think highly of sponsor	Feel good about doing business with sponsor	Seeing support makes me more receptive to sponsor's messages	Remember sponsorship when I see sponsor's logo	More likely to purchase sponsor's good	Sponsorship just a marketing tactic	Corporations should have other priorities	Indifferent about sponsorship	No one benefits from sponsorship
2007	42	45	32		31	26		26	11
2011	53	50	43	38	37	26	36	29	12
2014	55	53	39	36	35	35	33	23	4

Selected Findings:

• Corporate sponsorships are more admired than ever. Over half of respondents think highly of cultural sponsors (55%) and feel good about doing business with them (53%). Over a third (35%) are more likely to purchase goods or services from corporations that support the arts, while the small proportion of respondents who in 2011 felt that nobody benefits from sponsorship, has in fact decreased from 12% to 4%.

• On the other end of the spectrum, a third of respondents (an increase of 9% over those in 2011) view sponsorship as just a marketing tactic. This suggests that while audiences are increasingly savvy and critical when it comes to corporate sponsorships, they recognize the potential for positive impact.

11. CORPORATE SPONSORSHIP

11.2 PERCEPTIONS OF CORPORATE SPONSORSHIP:
BY FREQUENCY OF ATTENDANCE

Legend:
- No events (n=1215)
- 1 to 2 events (n=2189)
- 3+ events (n=622)

Category	No events	1 to 2 events	3+ events
Feel good about doing business with sponsor	41	57	65
Thinl highly of sponsor	42	61	65
Remember sponsorship when I see sponsor's logo	21	39	51
More likely to purchase sponsor's good	24	37	48
Seeing support makes me more receptive to sponsor's messages	29	43	47
Corporations should have other priorities	27	35	35
Sponsorship just a marketing tactic	39	34	31
Indifferent about sponsorship	31	21	18
No one benefits from sponsorship	4	4	5

Selected Insights:

• The more culturally active respondents are, the more likely they are to respond positively to corporate sponsorship.

12. OTHER FORMS OF CULTURAL PARTICIPATION

12. OTHER FORMS OF CULTURAL PARTICIPATION

From 2001 to 2011, Culture Track focused exclusively on the cultural activities explored in the previous sections of this report (e.g. visual arts museums, dramatic theater, classical music, etc.). In 2014, Culture Track expanded its scope to include a wider variety of cultural activities in order to explore the ever-broadening cultural landscape.
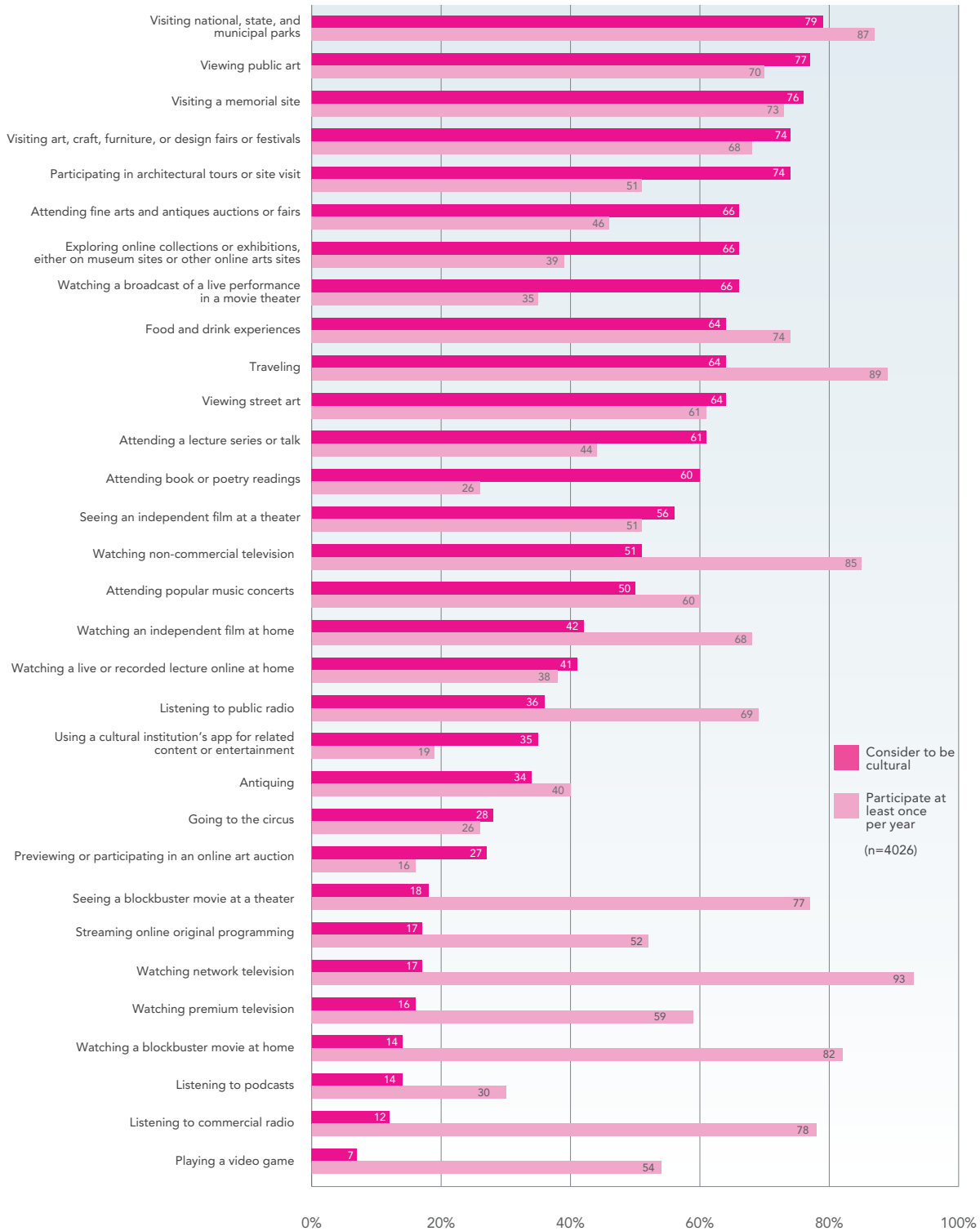
12. OTHER FORMS OF CULTURAL PARTICIPATION

12.1 OTHER ACTIVITIES PERCEIVED AS CULTURAL: OVERALL TRENDS

Question: Do you consider the following activities to be cultural? How often do you participate in them?

Activity	Consider to be cultural	Participate at least once per year
Visiting national, state, and municipal parks	79	87
Viewing public art	77	70
Visiting a memorial site	76	73
Visiting art, craft, furniture, or design fairs or festivals	74	68
Participating in architectural tours or site visit	74	51
Attending fine arts and antiques auctions or fairs	66	46
Exploring online collections or exhibitions, either on museum sites or other online arts sites	66	39
Watching a broadcast of a live performance in a movie theater	66	35
Food and drink experiences	64	74
Traveling	64	89
Viewing street art	64	61
Attending a lecture series or talk	61	44
Attending book or poetry readings	60	26
Seeing an independent film at a theater	56	51
Watching non-commercial television	51	85
Attending popular music concerts	50	60
Watching an independent film at home	42	68
Watching a live or recorded lecture online at home	41	38
Listening to public radio	36	69
Using a cultural institution's app for related content or entertainment	35	19
Antiquing	34	40
Going to the circus	28	26
Previewing or participating in an online art auction	27	16
Seeing a blockbuster movie at a theater	18	77
Streaming online original programming	17	52
Watching network television	17	93
Watching premium television	16	59
Watching a blockbuster movie at home	14	82
Listening to podcasts	14	30
Listening to commercial radio	12	78
Playing a video game	7	54

Legend:
- Consider to be cultural
- Participate at least once per year

(n=4026)

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12. OTHER FORMS OF CULTURAL PARTICIPATION

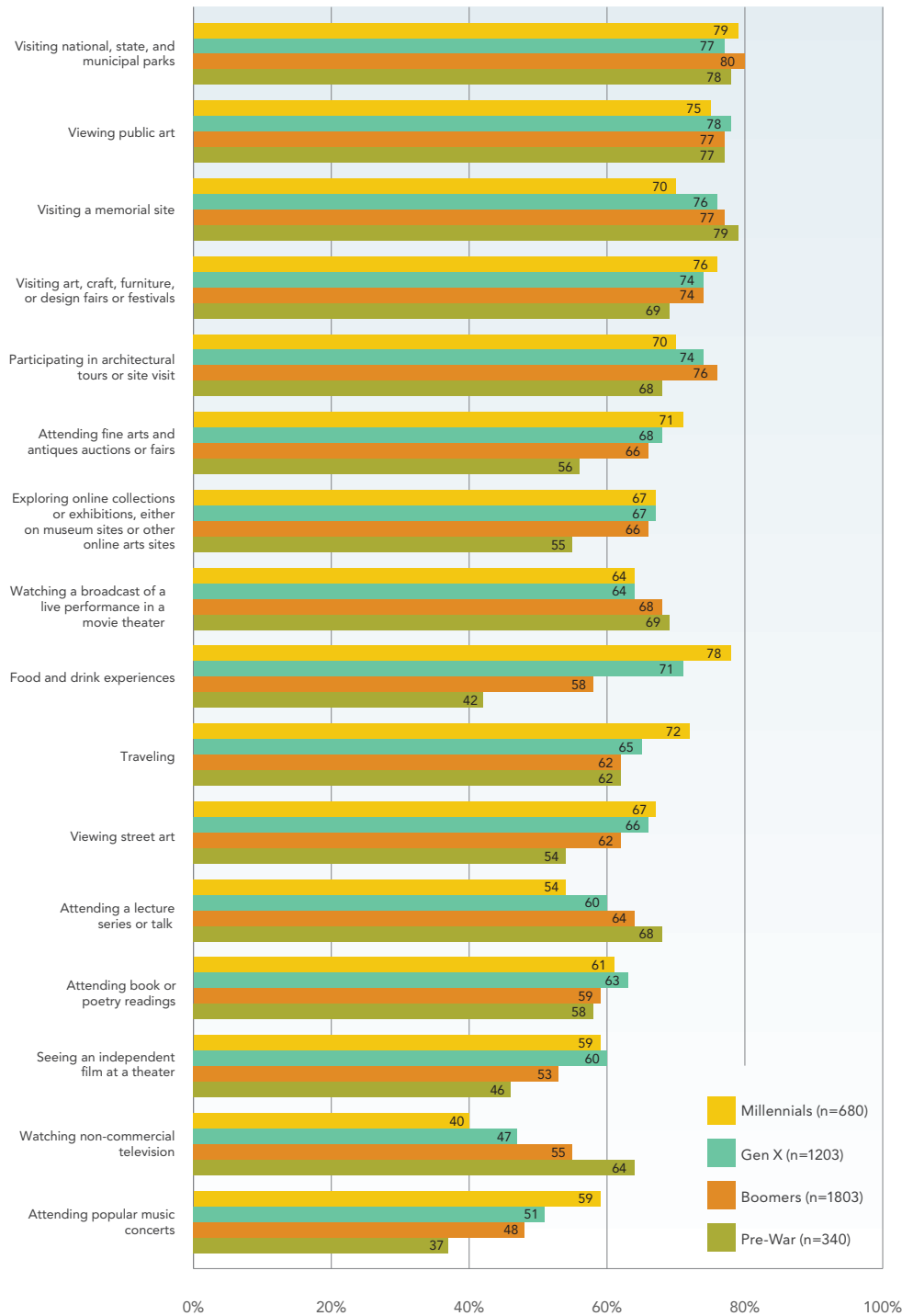## 12.1 OTHER ACTIVITIES PERCEIVED AS CULTURAL: OVERALL TRENDS (CONT'D)

Selected Findings:

• The previous chart displays the overall percentage of those who consider these other activities to be a cultural activity, as well as the percentage of respondents who participate in that activity at least once per year.

• Not only does a high percentage of audiences consider just over half of the items above to be cultural, but they are very active within this broader landscape.

• The items that are most likely to be considered cultural include visiting parks, viewing public art, and visiting a memorial site, while listening to podcasts, listening to commercial radio, and playing a video game ranked lowest.

• Notably, food and drink experiences fall within the top 10, with 64% of respondents considering this to be a cultural activity.

12. OTHER FORMS OF CULTURAL PARTICIPATION

12.2 OTHER ACTIVITIES PERCEIVED AS CULTURAL: BY GENERATION

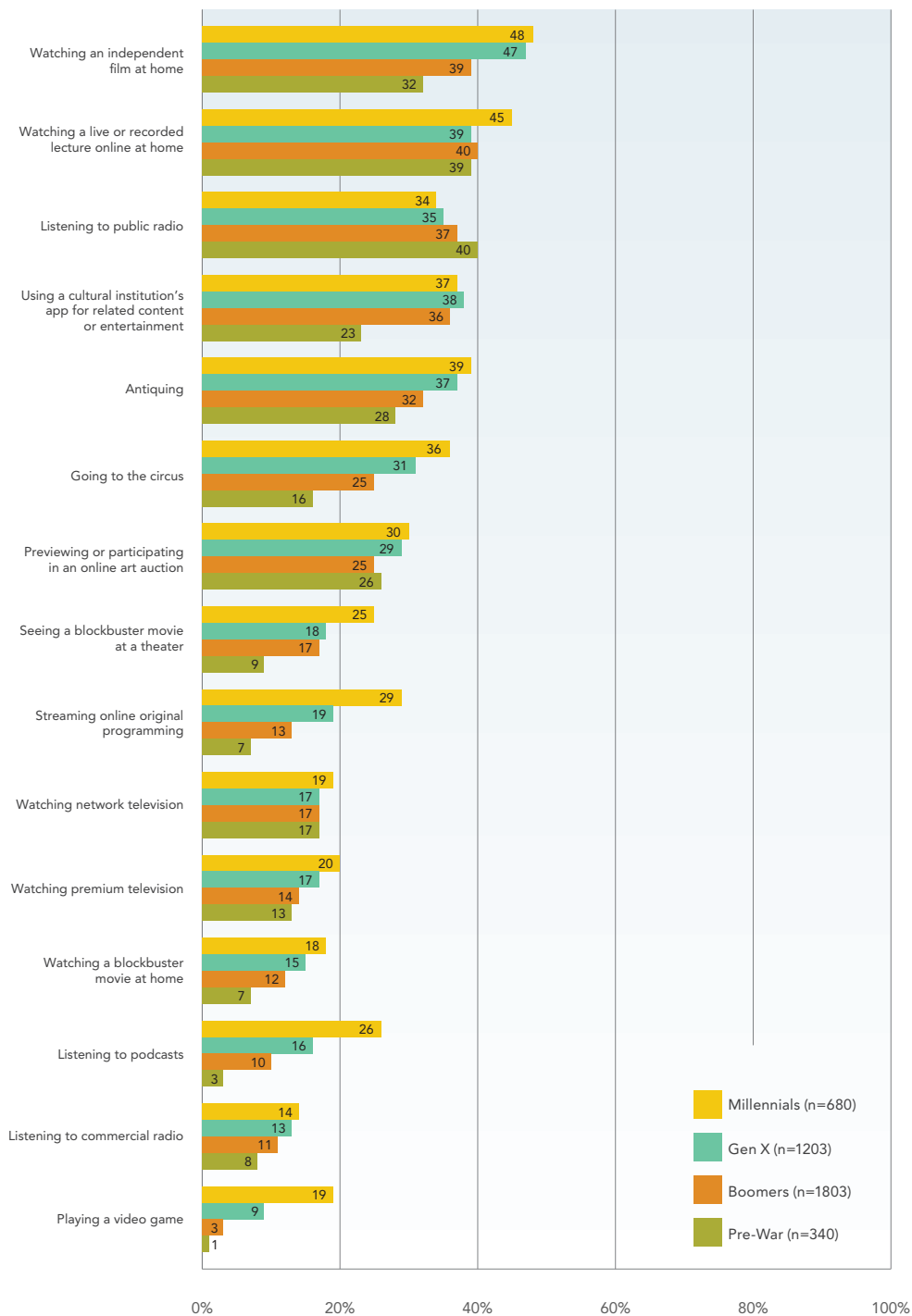Question: Do you consider the following activities to be cultural?

Activity	Millennials (n=680)	Gen X (n=1203)	Boomers (n=1803)	Pre-War (n=340)
Visiting national, state, and municipal parks	79	77	80	78
Viewing public art	75	78	77	77
Visiting a memorial site	70	76	77	79
Visiting art, craft, furniture, or design fairs or festivals	76	74	74	69
Participating in architectural tours or site visit	70	74	76	68
Attending fine arts and antiques auctions or fairs	71	68	66	56
Exploring online collections or exhibitions, either on museum sites or other online arts sites	67	67	66	55
Watching a broadcast of a live performance in a movie theater	64	64	68	69
Food and drink experiences	78	71	58	42
Traveling	72	65	62	62
Viewing street art	67	66	62	54
Attending a lecture series or talk	54	60	64	68
Attending book or poetry readings	61	63	59	58
Seeing an independent film at a theater	59	60	53	46
Watching non-commercial television	40	47	55	64
Attending popular music concerts	59	51	48	37

12.2 OTHER ACTIVITIES PERCEIVED AS CULTURAL: BY GENERATION (CONT'D)

Question: Do you consider the following activities to be cultural?

Activity	Millennials	Gen X	Boomers	Pre-War
Watching an independent film at home	48	47	39	32
Watching a live or recorded lecture online at home	45	39	40	39
Listening to public radio	34	35	37	40
Using a cultural institution's app for related content or entertainment	37	38	36	23
Antiquing	39	37	32	28
Going to the circus	36	31	25	16
Previewing or participating in an online art auction	30	29	25	26
Seeing a blockbuster movie at a theater	25	18	17	9
Streaming online original programming	29	19	13	7
Watching network television	19	17	17	17
Watching premium television	20	17	14	13
Watching a blockbuster movie at home	18	15	12	7
Listening to podcasts	26	16	10	3
Listening to commercial radio	14	13	11	8
Playing a video game	19	9	3	1

Legend:
- Millennials (n=680)
- Gen X (n=1203)
- Boomers (n=1803)
- Pre-War (n=340)

12. OTHER FORMS OF CULTURAL PARTICIPATION

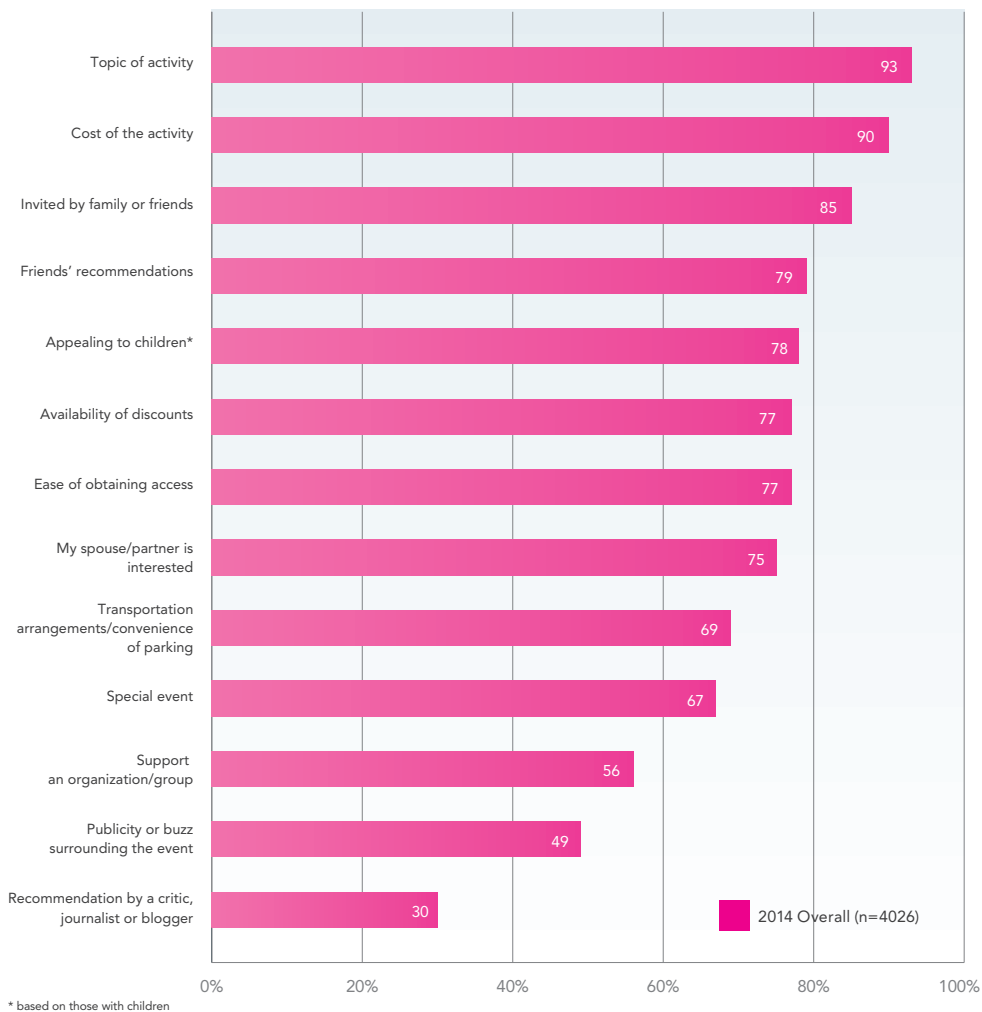## 12.2 OTHER ACTIVITIES PERCEIVED AS CULTURAL: BY GENERATION (CONT'D)

Selected Findings:

• Younger respondents are more likely to consider food and drink experiences and attending popular music concerts to be cultural activities.

• The perception of viewing non-commercial television as a cultural activity is largely driven by older respondents—as is listening to public radio, but to a lesser degree.

• Older generations are more likely to consider watching a broadcast of a live performance in a movie theater to be a cultural activity, but are less likely than younger generations to consider accessing a cultural institution's app to be a cultural activity.

• Older generations are more likely than younger generations to consider attending lectures to be a cultural activity.

12. OTHER FORMS OF CULTURAL PARTICIPATION

12.3 MOTIVATORS FOR OTHER ACTIVITIES PERCEIVED AS CULTURAL

Question: Please tell us whether the following factors influence your decision to participate in the previously listed activities.
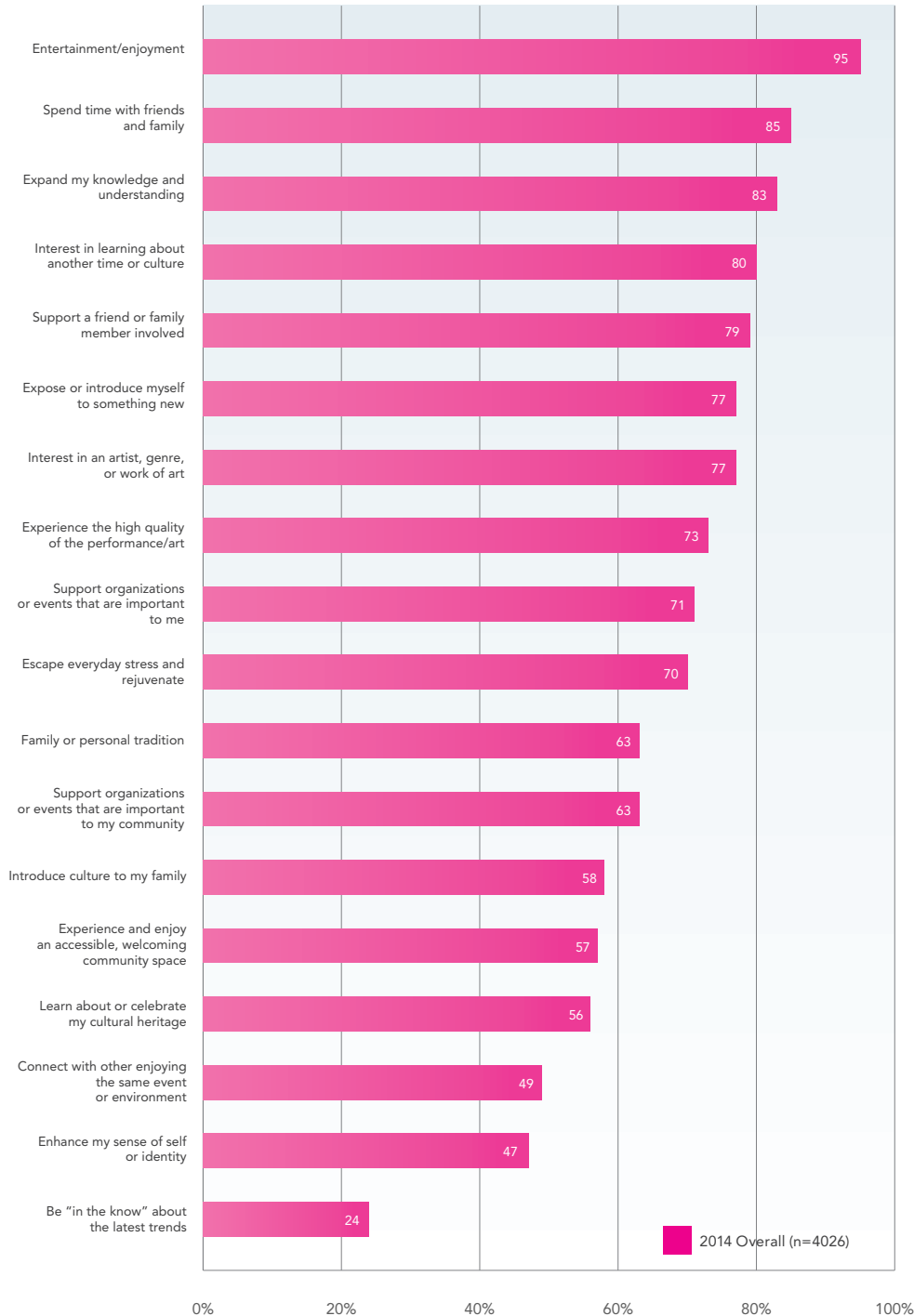
Factor	Value
Topic of activity	93
Cost of the activity	90
Invited by family or friends	85
Friends' recommendations	79
Appealing to children*	78
Availability of discounts	77
Ease of obtaining access	77
My spouse/partner is interested	75
Transportation arrangements/convenience of parking	69
Special event	67
Support an organization/group	56
Publicity or buzz surrounding the event	49
Recommendation by a critic, journalist or blogger	30

2014 Overall (n=4026)

* based on those with children

Selected Findings:

• The top five items that influence involvement in these other cultural activities are the same ones that influence involvement in the cultural activities explored earlier in this study. Regardless of the activity, publicity and recommendations by critics are the least influential.

• For nine in ten respondents, the most influential factors in deciding to engage in these activities are topic and cost. Being invited by family or friends and friends' recommendations are very influential.

12.4 REASONS TO MAKE OTHER CULTURAL ACTIVITIES A PART OF ONE'S LIFE: OVERALL TRENDS

Question: Please tell us whether each of the following play an important role in your decision to make the previously listed activities a part of your life.

Reason	2014 Overall (n=4026)
Entertainment/enjoyment	95
Spend time with friends and family	85
Expand my knowledge and understanding	83
Interest in learning about another time or culture	80
Support a friend or family member involved	79
Expose or introduce myself to something new	77
Interest in an artist, genre, or work of art	77
Experience the high quality of the performance/art	73
Support organizations or events that are important to me	71
Escape everyday stress and rejuvenate	70
Family or personal tradition	63
Support organizations or events that are important to my community	63
Introduce culture to my family	58
Experience and enjoy an accessible, welcoming community space	57
Learn about or celebrate my cultural heritage	56
Connect with other enjoying the same event or environment	49
Enhance my sense of self or identity	47
Be "in the know" about the latest trends	24

(Continued on following page)

12. OTHER FORMS OF CULTURAL PARTICIPATION

12.4 REASONS TO MAKE OTHER CULTURAL ACTIVITIES A PART OF ONE'S LIFE: OVERALL TRENDS (CONT'D)

Selected Findings:

• Mirroring the drivers for the cultural activities explored earlier in this study, respondents consider entertainment/enjoyment, spending time with friends and family, and personal enrichment to be the most important factors for making these activities a part of their lives.

12. OTHER FORMS OF CULTURAL PARTICIPATION

12.5 REASONS TO MAKE OTHER CULTURAL ACTIVITIES A PART OF ONE'S LIFE: BY GENERATION

Question: Please tell us whether each of the following play an important role in your decision to make the previously listed activities a part of your life.

Reason	Millennials (n=680)	Gen X (n=1203)	Boomers (n=1803)	Pre-War (n=340)
Entertainment/enjoyment	94	94	95	95
Spend time with friends and family	88	87	82	81
Expand my knowledge and understanding	81	82	84	82
Support a friend or family member involved	81	82	79	77
Interest in learning about another time or culture	80	81	80	78
Expose or introduce myself to something new	78	80	76	71
Interest in an artist, genre, or work of art	78	78	78	69
Escape everyday stress and rejuvenate	78	75	68	51
Experience the high quality of the performance/art	72	72	74	77
Support organizations or events that are important to me	69	69	73	77
Family or personal tradition	66	63	63	51
Experience and enjoy an accessible, welcoming community space	62	59	56	52
Introduce culture to my family	59	67	55	43
Support organizations or events that are important to my community	59	61	64	67
Enhance my sense of self or identity	58	52	43	32
Learn about or celebrate my cultural heritage	56	58	57	53
Connect with other enjoying the same event or environment	53	48	47	53
Be "in the know" about the latest trends	31	25	21	17

(Continued on following page)

12. OTHER FORMS OF CULTURAL PARTICIPATION

12.5 REASONS TO MAKE OTHER CULTURAL ACTIVITIES A PART OF ONE'S LIFE: BY GENERATION (CONT'D)

Selected Findings:

• As with the previously examined cultural activities, younger generations are more prone than older generations to participate in these other forms of cultural activities as a way to escape stress and rejuvenate, and to enhance their sense of self of identity.

13. DEFINING THE CULTURAL EXPERIENCE

13.DEFINING THE CULTURAL EXPERIENCE

For the first time, Culture Track asked respondents, "How would you define a cultural experience?"

The question was posed at the beginning of the survey. Because the survey questions that followed probed various aspects of the cultural experience and may have prompted respondents to think differently about what a cultural experience is to them, the question was asked again at the end of the survey so that respondents could revise or add to their original definition.

13.1 INITIAL DEFINITIONS

Selected responses:

"Something that takes you above your everyday life—a play, an evening of music, travel to another country. An experience that raises your awareness [and] that is uplifting."

"Participation in an activity that expands my view of human endeavor and the wonders of the world such as art, music, history etc."

"A cultural experience is something that enhances your mind, body and soul in a unique and profound way."

"Something that entertains, enriches, challenges the mind, and gives enjoyment."

"Having 'aha' moments."

"Something that offers enrichment via sight, sound, touch, or taste."

"An experience that enlightens and enlarges your world."

"Anything that you enjoy that broadens your mind."

"Anything that allows me to experience the world around me."

"The opportunity to have first-hand experience with a person, place, or thing that educates your mind and enhances your life."

"An experience that broadens one's perspective on the creativity of others."

"Any moment of any day where someone learns something new, views the world as art, or tries new things."

"An experience which enhances the emotional, spiritual, and mental aspects of life."

"[An experience] that brings a person to a new level of understanding."

13.DEFINING THE CULTURAL EXPERIENCE

13.2 REVISED DEFINITIONS

Selected responses:

"I never considered apps, movies, video games or solitary events to be 'cultural', but given the context presented, I'm willing to look at it differently."

"You made me consider other ways to get a cultural experience (e.g., radio broadcasts, tv programming)."

"Includes more personal experiences."

"I have become more aware of the many cultural activities I participate in every day."

"I now see it as anything that allows me to experience the world around me."

"More things can be cultural, if you go out and experience them."

"Culture is anything that you enjoy that broadens your mind."

"I thought that is was about experiencing things about other cultures and groups of people, but now realize it is also about experiencing things that are around me and my own community as well."

"I have realized that almost anything can be considered as culture, especially food and cuisine. How could I forget that?"

14. DEMOGRAPHICS

14. DEMOGRAPHICS

14.1 GENDER
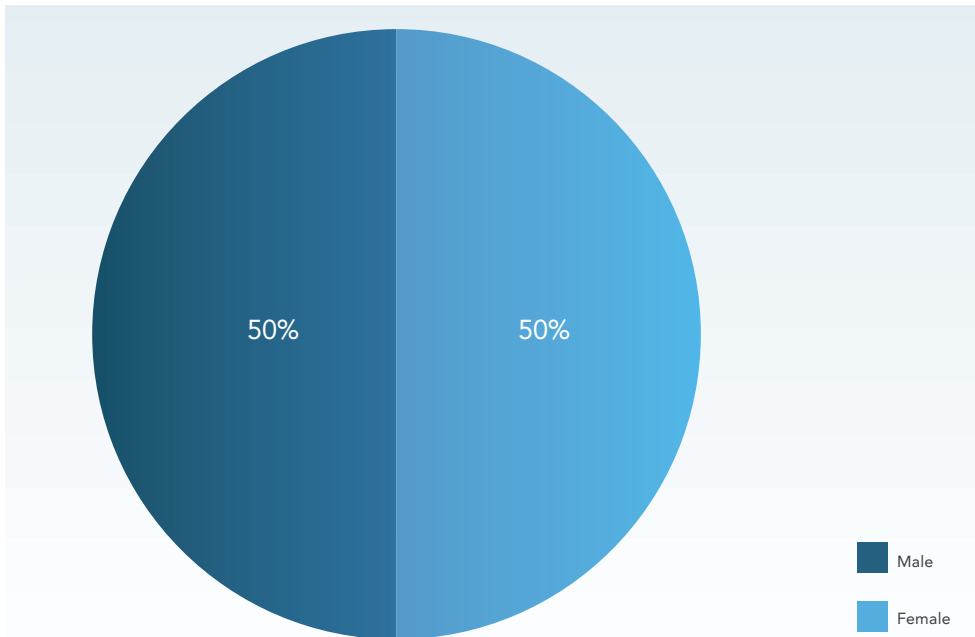
Selected Findings:

• In 2014, cultural participants were equally likely to be male and female. The 2011 results skewed five percent higher among females. Because quotas were not established for gender during recruiting, this result may reflect a shift toward higher engagement in cultural activities by men.
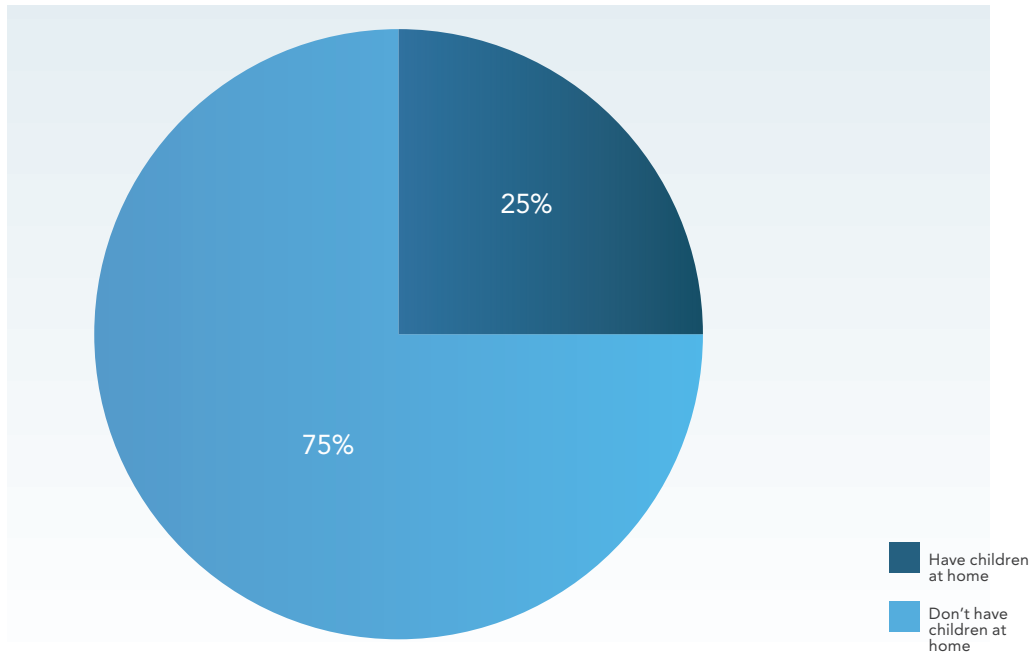
14. DEMOGRAPHICS

14.2 AGE

Legend:
- 2011 (n=4005)
- 2014 (n=4026)

	Millennials (Under 30)	Gen X (30 to 49)	Boomers (50 to 69)	Pre-war (70+)
2011	16	30	46	9
2014	17	30	45	9
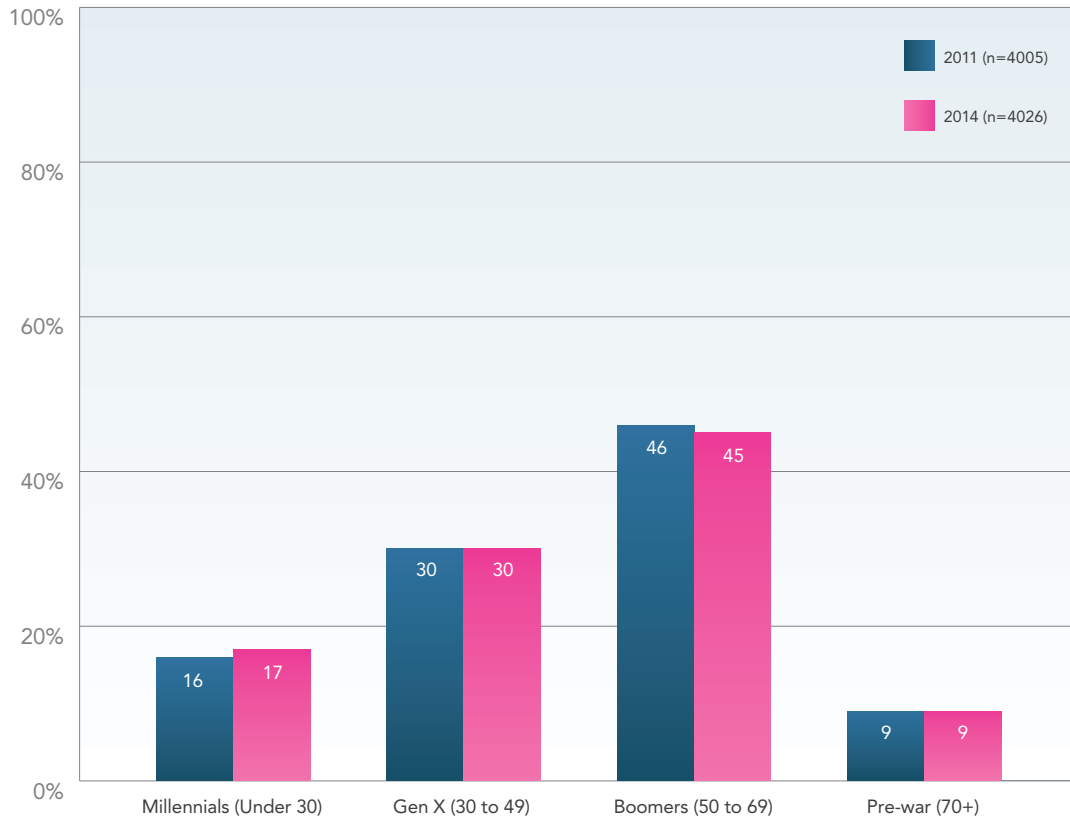
Selected Findings:

• The age proportions from the 2011 Culture Track study were used as quotas for the 2014 respondents. Such controls limit the possibility that changes in respondent attitudes toward cultural activities are based solely on factors related to age.

14. DEMOGRAPHICS

14.3 CHILDREN

Have children at home — 25%
Don't have children at home — 75%

Selected Findings:

• 25% of respondents have children 18 or under living in their home.

• Compared to 2011, 2014 respondents were less likely to have children in the home (25% in 2014 vs. 30% in 2011).

14. DEMOGRAPHICS

14.4 EDUCATION

Bar chart showing education levels for 2011 (n=4005) and 2014 (n=4026):
- High school graduate or less: 2011 = 21, 2014 = 16
- Some college: 2011 = 28, 2014 = 29
- Associate degree: 2011 = 11, 2014 = 12
- College degree: 2011 = 23, 2014 = 22
- Post-graduate study (but no degree): 2011 = 5, 2014 = 5
- Post-graduate degree: 2011 = 12, 2014 = 16
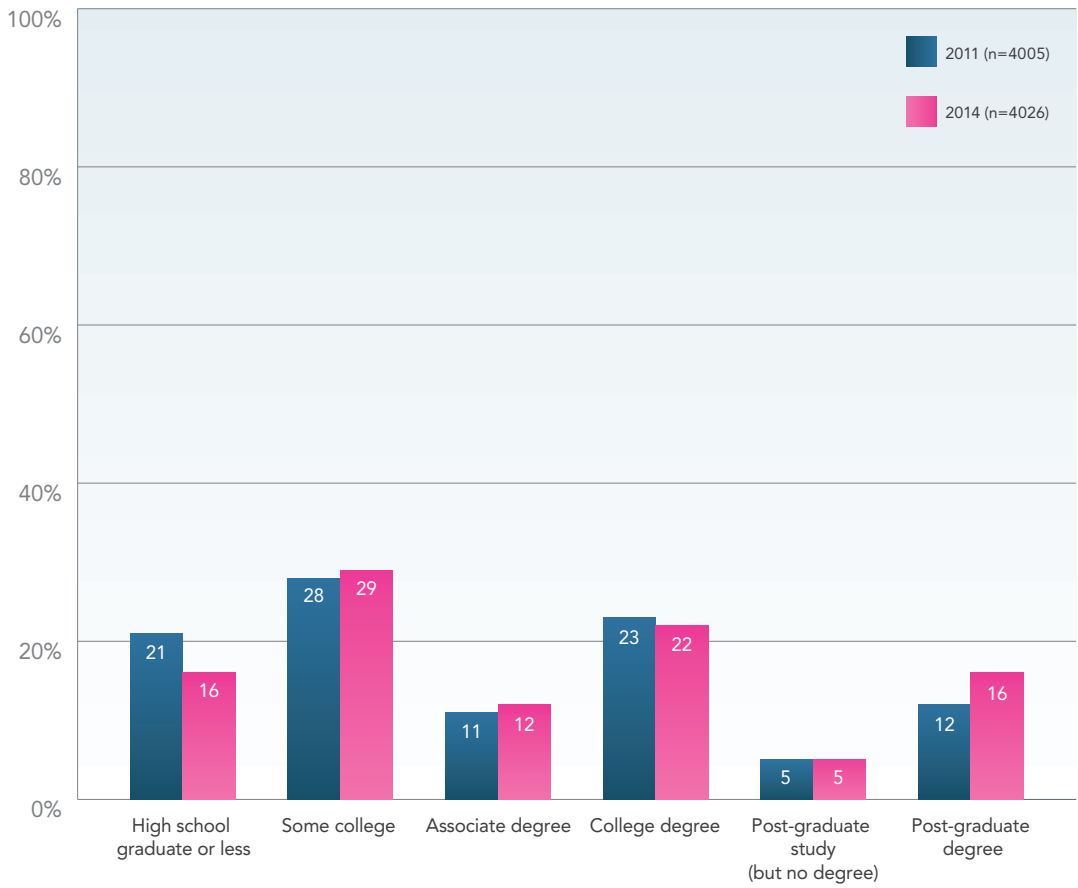
Selected Findings:

- 2014 respondents are slightly more educated than the 2011 respondents, with two in five (43%) having at least a college degree.

14. DEMOGRAPHICS

14.5 HOUSEHOLD INCOME

Legend:
- 2011 (n=4005)
- 2014 (n=4026)

Income	2011	2014
Under $20,000	13	11
$20,000 - $29,999	11	11
$30,000 - $39,999	12	12
$40,000 - $49,999	11	12
$50,000 - $74,999	22	25
$75,000 - $99,999	12	11
$100,000 - $124,999	6	6
$125,000 - $149,000	3	4
$150,000 or more	3	5
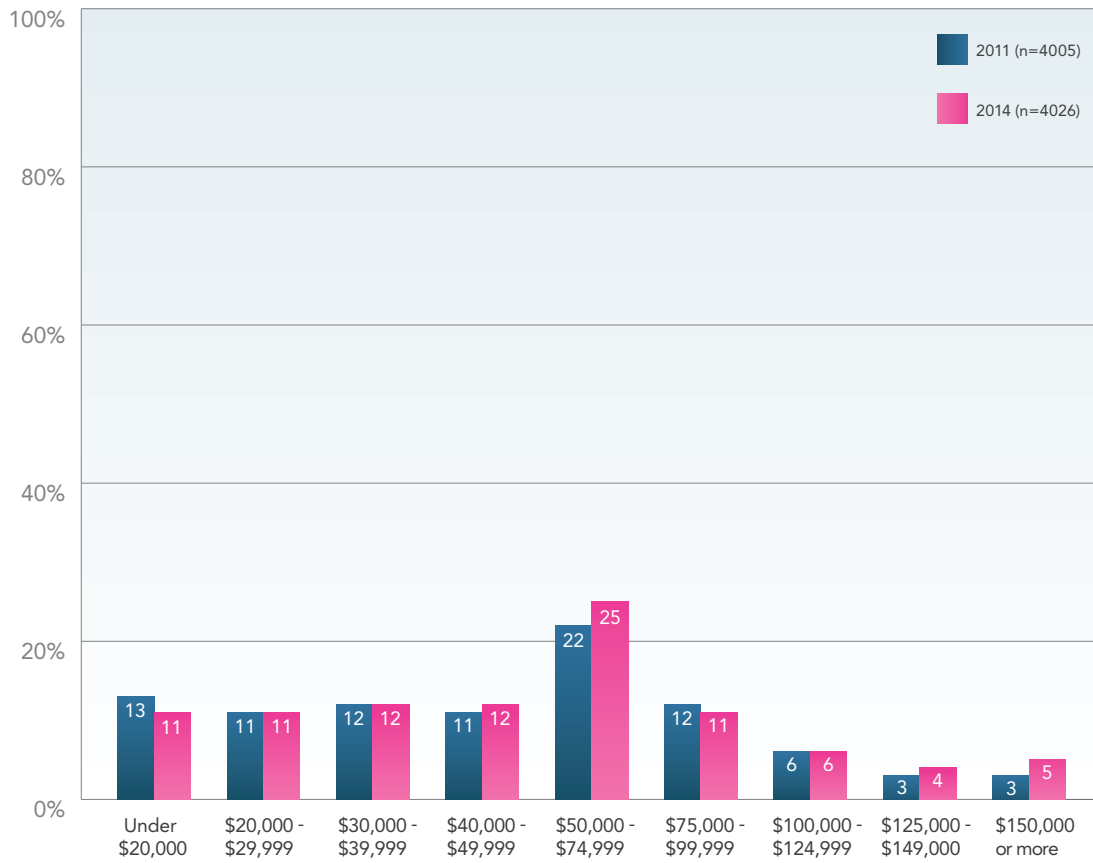
Selected Findings:

• A third of respondents (34%) have household incomes under $40,000, while 15% have incomes of $100,000 or more.

14. DEMOGRAPHICS

14.6 ETHNICITY

Pie chart:
- 86% White/Caucasian
- 5% Asian
- 4% African American
- 5% Other

Legend:
- White/Caucasian
- Asian
- African American
- Other
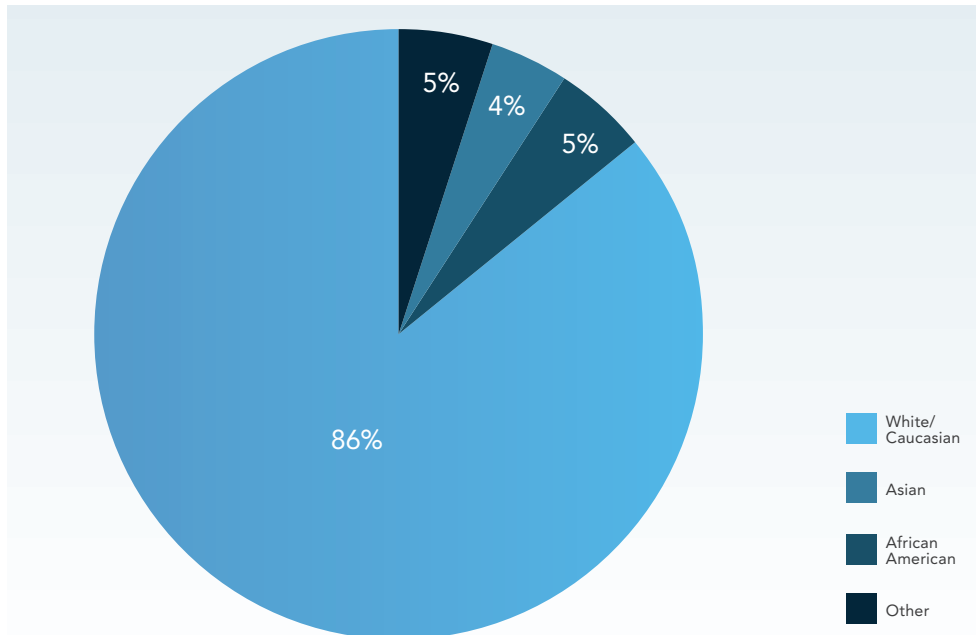
Selected Findings:

• Though the initial pool of respondents invited to take the survey mirrored the ethnic breakdown of the U.S. population, the proportions shifted once respondents were screened to ensure that they had participated in at least one cultural activity in the past year.

• Ethnic breakouts in the 2014 study are similar to those in the 2011 study, despite the fact that no quotas were used.

14. DEMOGRAPHICS

14.7 COMMUNITY TYPE

25%

48%

27%
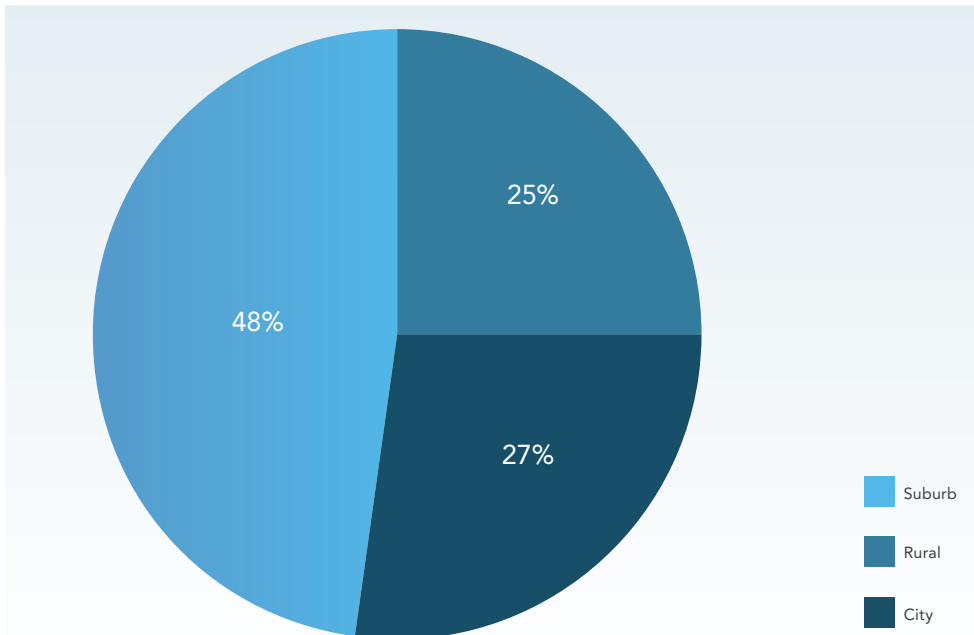
Suburb

Rural

City

Selected Findings:

• Almost half of the respondents (48%) live in the suburbs, while about a quarter each live in the city (27%) or rural areas (25%).

14. DEMOGRAPHICS

14.8 MARITAL STATUS

Legend:
- 2011 (n=4005)
- 2014 (n=4026)

Marital Status	2011	2014
Married	54	52
Single	21	26
Divorced	12	11
Committed to a life partner	8	7
Widowed	5	3
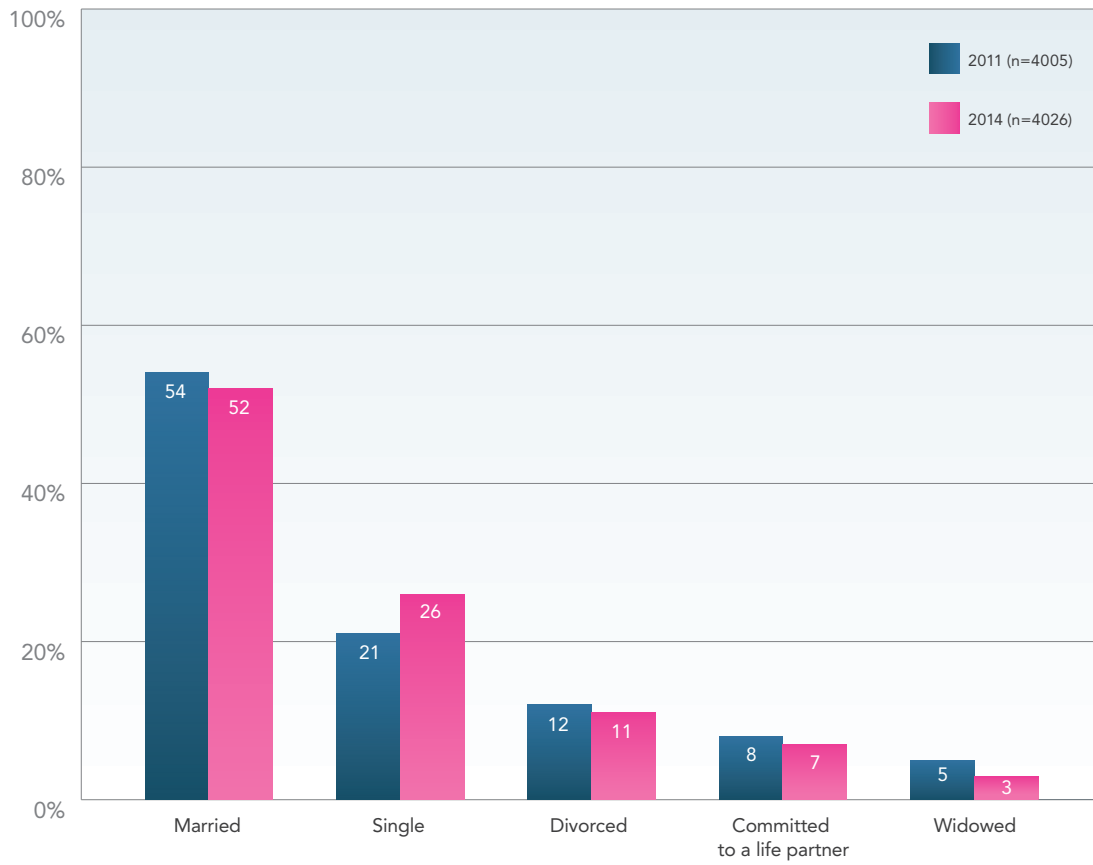
Selected Findings:

• Half of the respondents are married (52%), while another 7% are in a committed relationship.

14. DEMOGRAPHICS

14.9 GEOGRAPHIC LOCATION
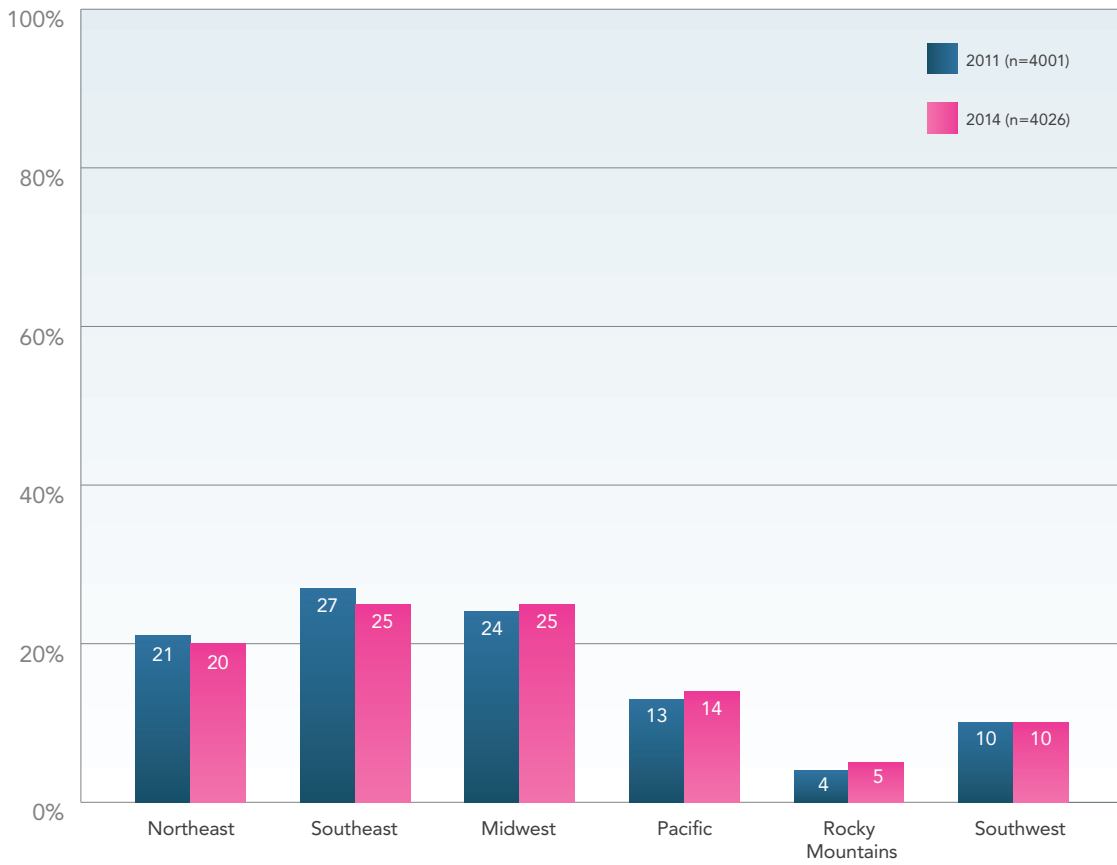
Selected Findings:

• The geographic location of the 2014 respondents is similar to the 2011 results, and both are in line with the proportion of U.S. respondents by region.

ACKNOWLEDGEMENTS

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