About Culture Track
Culture Track is a national online survey of cultural consumers’ attitudes, motivators, and barriers to participation.
Data collected from 4,035 cultural consumers mirroring U.S. demographics, divided into 2 data sets
Data Set 1: Ongoing Tracking

- Core questions that track key trends since 2001
- Select set of cultural activities
- Sample size: 1,022
  Margin of error: +/- 3.1%
Data Set 2: Future Forecasting

- Updated questions to help chart the future of culture
- Expanded set of cultural activities to reach a more diverse sample
- Sample size: 3,013
  Margin of error: +/- 1.8%
<table>
<thead>
<tr>
<th>Culture Track</th>
<th>U.S. Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>62% Non-Hispanic Caucasians</td>
<td>61% Non-Hispanic Caucasians</td>
</tr>
<tr>
<td>17% Hispanic</td>
<td>17% Hispanic</td>
</tr>
<tr>
<td>15% African-American</td>
<td>13% African-American</td>
</tr>
<tr>
<td>4% Asian</td>
<td>5% Asian</td>
</tr>
</tbody>
</table>
Generational Segments

20 - 35
Millennials

36 - 52
Gen X

53 - 71
Baby Boomers

72+
Pre-War
A Paradigm Shift
What has changed:
What has changed:

- New modes of communication and connection
What has changed:

- New modes of communication and connection
- Transformed patterns of giving
What has changed:

- New modes of communication and connection
- Transformed patterns of giving
- Endless options for leisure time
An expanded definition of culture
Activities Defined as “Culture”

- Historic Attraction/Museum: 69%
- Art/Design Museum: 63%
- Community Festival/Street Fair: 62%
- Music Festival: 59%
- Natural History Museum: 57%
- Public/Street Art: 54%
- Food and Drink Experience: 52%
- Musical: 51%
- Classical Music: 51%
- Play (Non-Musical): 48%
- Opera: 48%
- Ballet: 47%
- Movies/Film: 41%
- TV: 23%
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If the traditional notion of “culture” is extinct, what is culture’s purpose in a new and increasingly complex world?
Fortunately, the very audiences that are breaking down the definition of culture are also helping to rebuild a new one.
Transforming Perspectives

“Having it change the way you think or challenging the norms. Anything that makes you feel anything and question what you already know.”
Building Community

“Building stronger communities by bringing people who may not think they have much in common together.”
Educating the Public

“Broadening my horizons, understanding of life and situations, and helping me learn about other peoples of the world."
Fostering Empathy

“Bringing people of many different backgrounds together, and cementing the fact that our world is better for having so many diverse cultures. It needs to bring understanding and acceptance.”
The New Cultural Consumer
Changing audience attitudes:
Changing audience attitudes:

- What is the mindset of this new cultural consumer?
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- What is the mindset of this new cultural consumer?
- Why do they engage with culture in the first place?
Changing audience attitudes:

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

- Having fun: 81%
- Interest in the content: 78%
- Experiencing new things: 76%
- Feeling less stressed: 76%
- Learning something new: 71%
- Feeling inspired: 69%
- Interacting with others: 68%
- Feeling transported: 67%
- Feeling welcome: 64%
- Gives life a deeper meaning: 61%
- Connecting to my community: 56%
- Bettering health/well-being: 55%
- Grew up participating: 53%
- Being able to go by myself: 50%
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- Interest in the content (78)
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When it comes to addressing why culture can drive audiences away, personal relevance is critical.
Barriers to Cultural Participation

1.

2.

3.

4.

5.
Barriers to Cultural Participation

1. 

2. 

3. 

4. 

5. Its value is not worth the cost
Barriers to Cultural Participation

1. 

2. 

3. 

4. I couldn’t find anyone to go with 

5. Its value is not worth the cost
Barriers to Cultural Participation

1. 

2. 

3. It’s inconvenient

4. I couldn’t find anyone to go with

5. Its value is not worth the cost
Barriers to Cultural Participation

1. 

2. I didn’t think of it

3. It’s inconvenient

4. I couldn’t find anyone to go with

5. Its value is not worth the cost
Barriers to Cultural Participation

1. It’s not for someone like me
2. I didn’t think of it
3. It’s inconvenient
4. I couldn’t find anyone to go with
5. Its value is not worth the cost
The New Cultural Consumer

Spotlight Stats
Accessibility fails without empathy.

People with disabilities are 59% more likely to avoid cultural activities because of a previous negative experience.
Diversity means representation.

People of color are 82% more likely to stay away because activities don’t reflect people of a range of backgrounds.
4

The Digital Dilemma
Audiences have a range of perspectives on how digital technology currently enhances or detracts from their experience.
Top Reasons Why Digital Appeals in Cultural Activities

1. 

2. 

3. 

4. 
Top Reasons Why Digital Appeals in Cultural Activities

1. 

2. 

3. 

4. Makes the activity feel new
Top Reasons Why Digital Appeals in Cultural Activities

1. 

2. 

3. Deeper understanding of content 

4. Makes the activity feel new
Top Reasons Why Digital Appeals in Cultural Activities

1. 

2. Activity is shareable digitally

3. Deeper understanding of content

4. Makes the activity feel new
Top Reasons Why Digital Appeals in Cultural Activities

1. Access to more detailed info
2. Activity is shareable digitally
3. Deeper understanding of content
4. Makes the activity feel new
Top Reasons Why Analog Appeals in Cultural Activities

1. 

2. 

3. 

4. 
Top Reasons Why Analog Appeals in Cultural Activities

1. 

2. 

3. 

4. Better connection to content
Top Reasons Why Analog Appeals in Cultural Activities

1. 

2. 

3. Less complicated

4. Better connection to content
Top Reasons Why Analog Appeals in Cultural Activities

1. 

2. More focus on the activity

3. Less complicated

4. Better connection to content
Top Reasons Why Analog Appeals in Cultural Activities

1. Feels more authentic
2. More focus on the activity
3. Less complicated
4. Better connection to content
Overall, however, audiences are very open to future digital experiences across cultural activities.
# Desire for Digital Experiences in Cultural Activities

<table>
<thead>
<tr>
<th>Category</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Science, Tech, Nat History Museum</td>
<td>86</td>
</tr>
<tr>
<td>Art/Design Museum</td>
<td>81</td>
</tr>
<tr>
<td>Popular Music</td>
<td>80</td>
</tr>
<tr>
<td>Zoo, Aquarium, Botanical Garden</td>
<td>80</td>
</tr>
<tr>
<td>TV/Film</td>
<td>79</td>
</tr>
<tr>
<td>Regional/Contemporary Dance</td>
<td>78</td>
</tr>
<tr>
<td>Community Festival/Street Fair</td>
<td>71</td>
</tr>
<tr>
<td>Opera</td>
<td>71</td>
</tr>
<tr>
<td>Musical</td>
<td>67</td>
</tr>
<tr>
<td>Ballet</td>
<td>65</td>
</tr>
<tr>
<td>Public Park</td>
<td>65</td>
</tr>
<tr>
<td>Classical Music</td>
<td>64</td>
</tr>
<tr>
<td>Play (Non-Musical)</td>
<td>60</td>
</tr>
</tbody>
</table>
Considerations for digital:
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— Does it enrich or distract?
Considerations for digital:

- Does it enrich or distract?
- Does it simplify the experience, or add unnecessary complexity?
Considerations for digital:

- Does it enrich or distract?
- Does it simplify the experience, or add unnecessary complexity?
- Does it feel authentic?
For parents (and families), tech is a plus.

Parents are 52% more likely to say wearable technology would enhance a cultural experience.
Social media can make a broader impact.

People of color are 31% more likely to say integrating social media would enhance their experience.
The Loyalty Revolution
Since 2011, there has been a flat or downward trend in memberships and subscriptions — a “cultural promiscuity” phenomenon that continues in 2017.
Visual Arts Memberships

Performing Arts Subscriptions

2011: 26, 2017: 22

2011: 23, 2017: 21
This doesn’t mean that people aren’t loyal.
Audience Loyalties

- Restaurants or bars: 58%
- Retail stores: 48%
- Sports teams: 44%
- TV networks, websites, streaming services: 36%
- Schools or universities: 36%
- Political parties: 31%
- Cultural organizations: 27%
- Airlines: 26%
- Gyms: 20%
Audience Loyalties

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Outside of culture, audiences view loyalty as a personal relationship.
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Their ideal partner is:
Outside of culture, audiences view loyalty as a personal relationship.

Their ideal partner is:

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

Their ideal partner is:
- trustworthy
- consistent
Outside of culture, audiences view loyalty as a personal relationship.

Their ideal partner is:
- trustworthy
- consistent
- kind
Motivators for Loyalty

- Trustworthiness: 61%
- Consistent quality: 57%
- Customer service: 55%
- Reputation: 50%
- Discounts: 47%
- Rewards: 43%
- Personalization: 42%
- Shared values: 41%
- Content/products: 41%
Motivators for Loyalty

- Trustworthiness: 61%
- Consistent quality: 57%
- Customer service: 55%
- Reputation: 50%
- Discounts: 47%
- Rewards: 43%
- Personalization: 42%
- Shared values: 41%
- Content/products: 41%
The Loyalty Revolution

Spotlight Stats
When it comes to parents’ loyalty, keep it simple.

Parents are more likely to join a loyalty program that simplifies their planning.
For younger generations, to tweet is to care.

Over \(\frac{1}{3}\) of younger generations feel that engaging on social media is an act of loyalty.
The Case for Support
Audiences regularly experience many forms of culture — film, music, festivals, and more — that do not solicit or depend on donations to exist.
And yet, audiences still give consistently to organizations that do.
Plans to Donate to Culture

- 2011: 33%
- 2017: 41%
The top reasons for donating to culture all relate to one thing:
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Social impact.
Motivators for Donating to Culture

- Believe in mission: 63%
- Want to impact the community: 54%
- Want to impact the world: 51%
- Admire the organization: 50%
- Want to support artists: 45%
- Know it needs support: 45%
- Worried about its funding: 30%
Motivators for Donating to Culture

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- Admire the organization: 50%
- Want to support artists: 45%
- Know it needs support: 45%
- Worried about its funding: 30%
Reasons for Not Donating to Culture

- Other causes have greater impact: 25%
- I only give to one cause: 25%
- Not personally important to me: 22%
- My taxes already help: 21%
- They don’t need more funding: 8%
Other causes have greater impact
I only give to one cause
Not personally important to me
My taxes already help
They don’t need more funding

25%
25%
22%
21%
8%
Comparative Appeal by Philanthropic Cause

- Children: 42
- Religion: 36
- Health: 35
- Animal welfare: 32
- Education: 28
- Humanitarian relief: 28
- Community: 27
- Poverty alleviation: 21
- Social services: 21
- Human rights: 20
- Culture: 18
- Environment: 17
- Political: 16
- Equality: 12
- Science and technology: 11
- Economic empowerment: 7
- Other: 7
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- Other: 7
Developing the “new philanthropy:”
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— Establish a “dialogue-based relationship”
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Developing the “new philanthropy:”

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

Spotlight Stats
For Pre-Wars, community comes first.

Pre-Wars are 55% more likely to give to community organizations.
Culture and social change are intertwined.

People of color are 71% more likely to donate to civil and human rights organizations.
Conclusion: Five Key Takeaways
Disrupting the very meaning of culture requires a reimagination of the field, from remapping space and experience, to inventing new types of programs and services.
#2 Relevance

Addressing people’s individual needs, rituals, and backgrounds in nuanced ways across channels is essential for engaging new and non-traditional audiences.
#3 Connection

Audiences have divided attitudes about digital versus analog; the key is finding the most authentic way to connect them more deeply to the content, experience, or each other.
#4 Relationships

With audiences now viewing loyalty as a personal relationship, empathic, service-focused programs must replace existing transactional models.
The future of cultural philanthropy will hinge on tangible impact, with greater emphasis on “SROI” – Social Return on Investment.
Explore Culture Track ‘17 at:

2017study.culturetrack.com

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