

CULTURE TRACK '14

FOCUS ON
BOSTON

LaPlaca
Cohen

Campbell Rinker

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A version of this document was presented by Arthur Cohen, CEO of LaPlaca Cohen, at the Culture Track 2014: Focus on Boston release at the Museum of Fine Arts, Boston on Friday September 26, 2014.

The following are top-line insights from Culture Track 2014: Focus on Boston. The comprehensive results from the study can be downloaded at mfa.org/culturetrackbos.

Twitter: [#culturetrackbos](https://twitter.com/culturetrackbos)

What is Culture Track?

An Ongoing Study

2001

2003

2005

2008

2011

2014

An Ongoing Study

of the

Attitudes
Motivators
Barriers

of

Culturally-
active
audiences

Today's cultural audiences
are complicated and
ever-changing.

So Culture Track asked them ...

what? how? why?

Introducing Culture Track: Focus on Boston

#culturetrackbos

The first deep-dive
Culture Track study of
culturally- active
Bostonians, designed to ...

Create

a robust, 360-degree
understanding of Boston's
unique cultural community

Understand
what's really driving or
discouraging cultural
participation in Boston

Compare
the Boston market to the
greater U.S. cultural
landscape

Establish

a shared and actionable
resource of audience data
for the benefit of the
Boston cultural community

**First, some
background**

Methodology



Data collected from

4,026

people in all 50 states

+/-1.6% margin of error



Data collected from
1,238
people in Boston market

+/-2.8% margin of error

4 audience segments by age

Boston



National

18 to 29

Millennials

30 to 49

Gen **X**

50 to 69

Boomers

70+

Pre-War

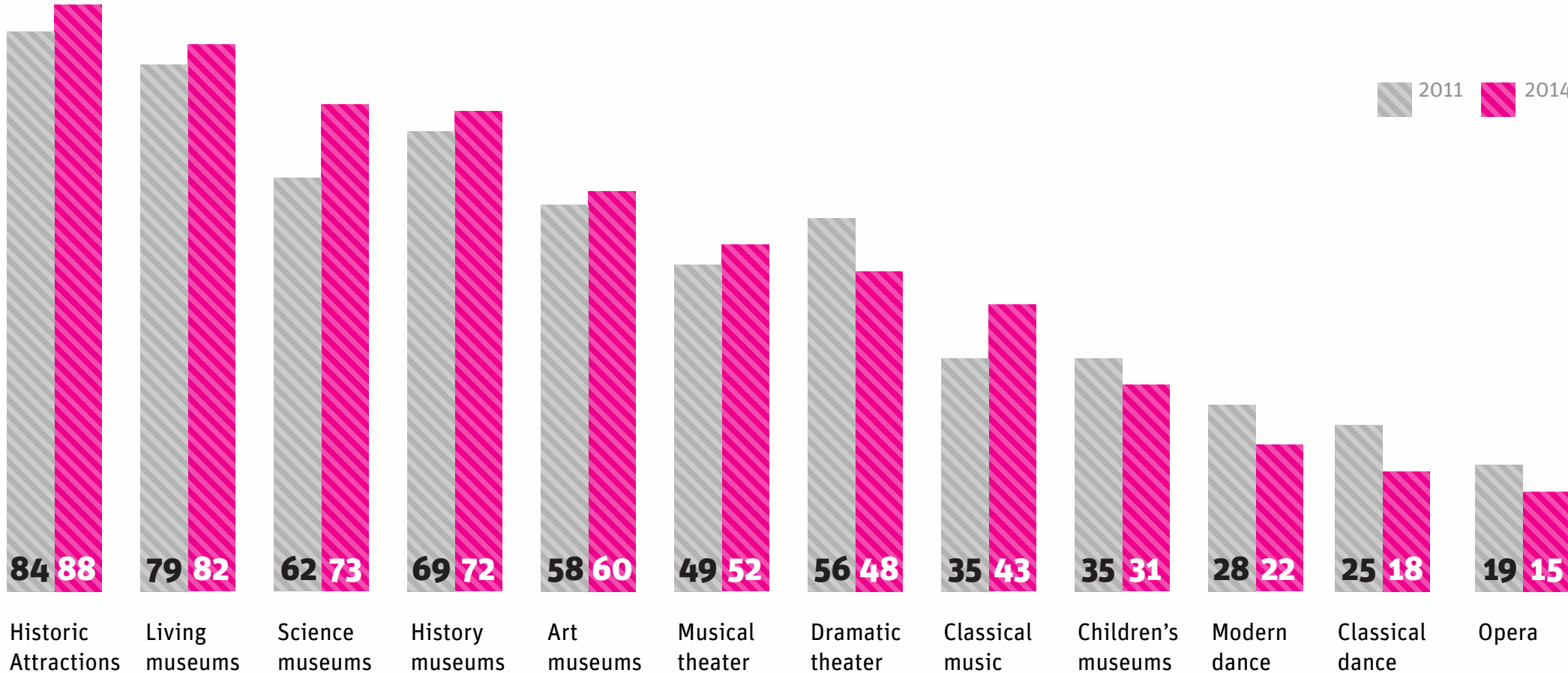
What we learned

Cultural Landscape

Nationally, participation has increased for a majority of art forms, with some exceptions.

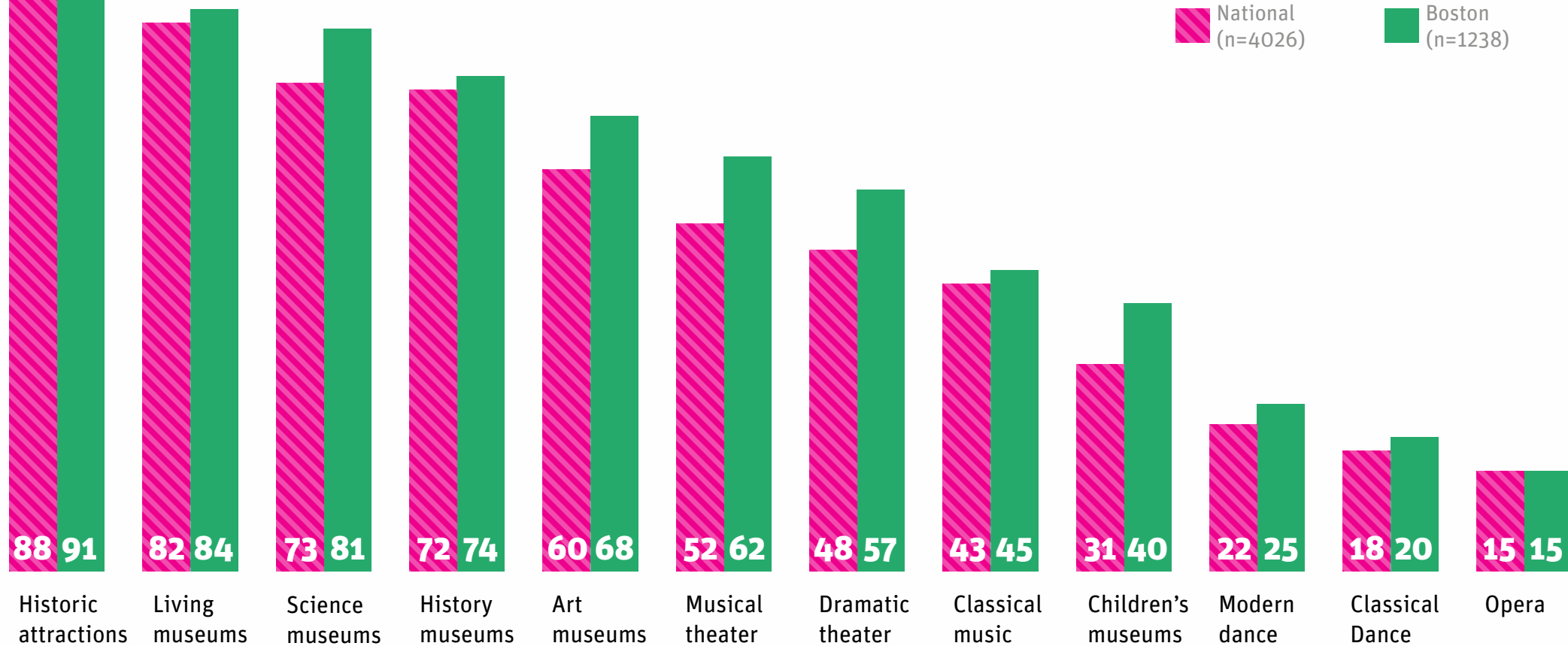
PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR

2011 2014



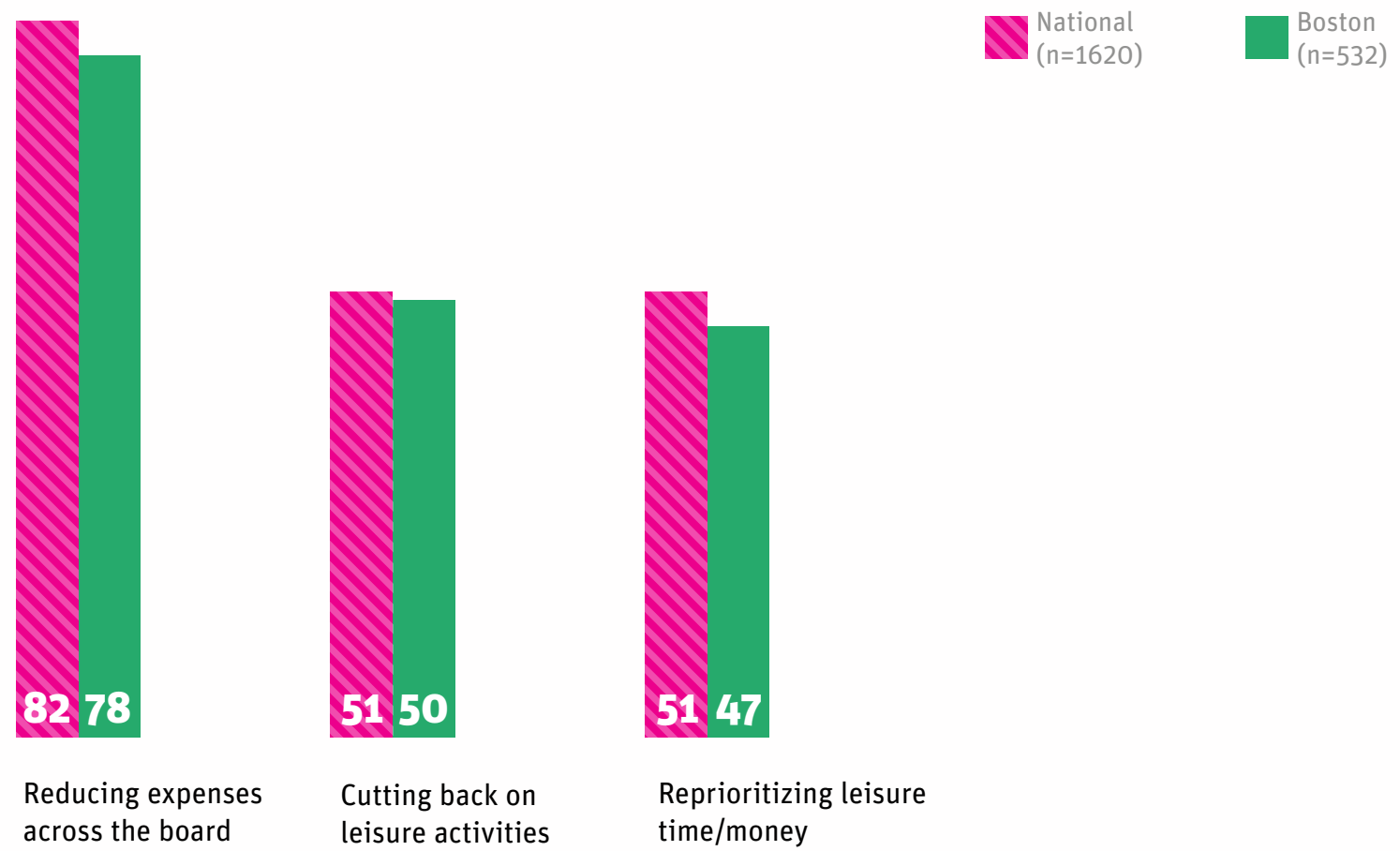
Comparatively, Boston
has an even more robust
cultural market.

PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR



Despite the lingering effect
of the economic downturn ...

ECONOMIC REASONS FOR DECREASING CULTURAL PARTICIPATION



... Bostonians attend
cultural activities more
frequently than national
audiences.

AVERAGE NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH

1.42

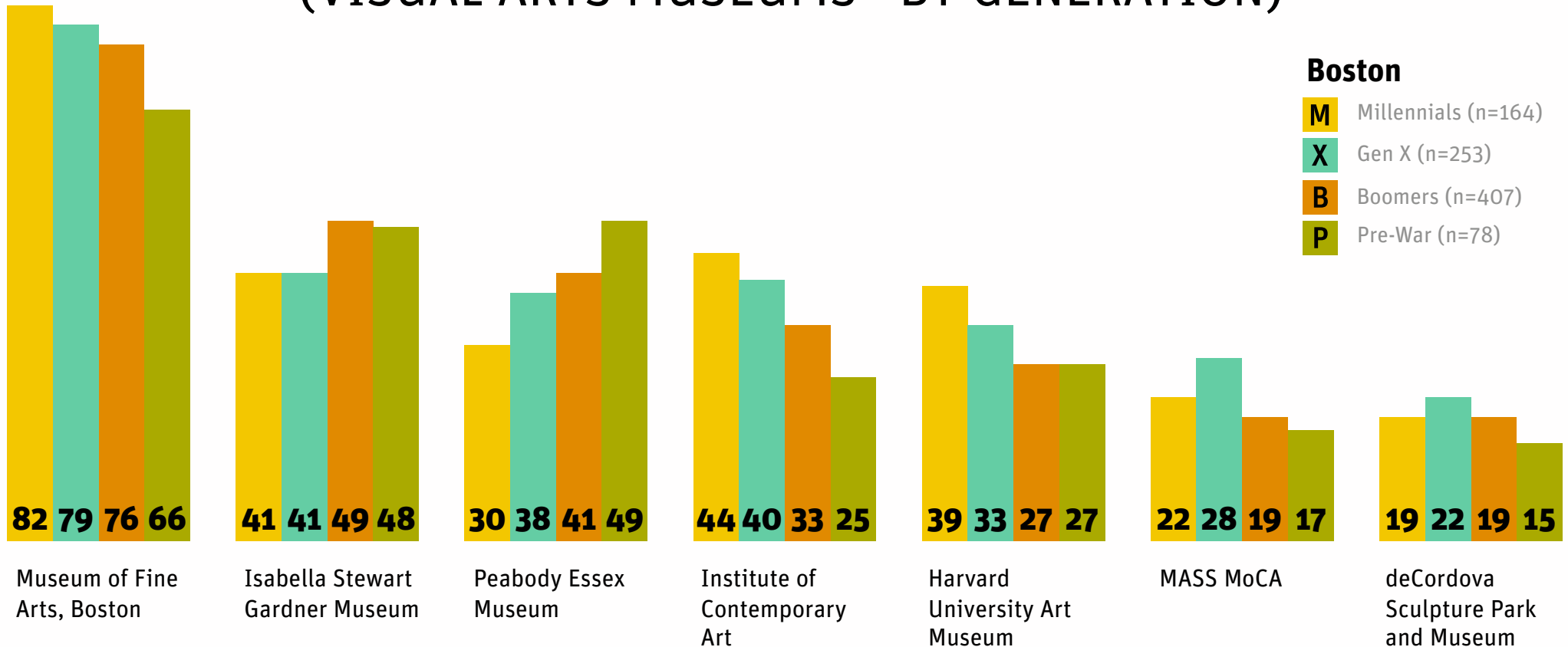
National

1.79

Boston

Attendance patterns vary
at Boston-area cultural
organizations.

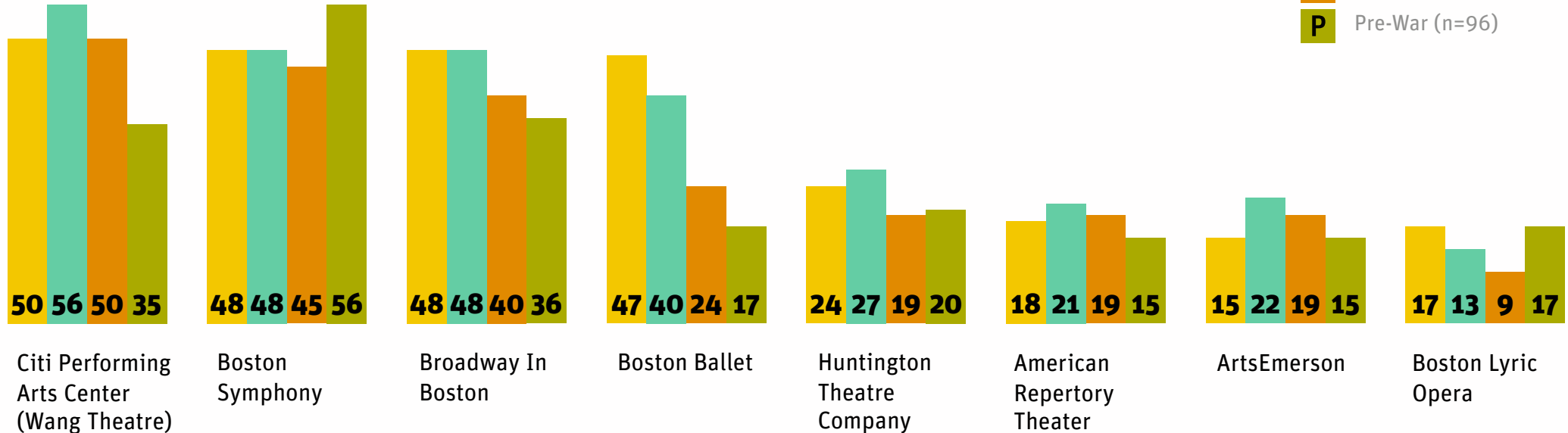
PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR (VISUAL ARTS MUSEUMS—BY GENERATION)



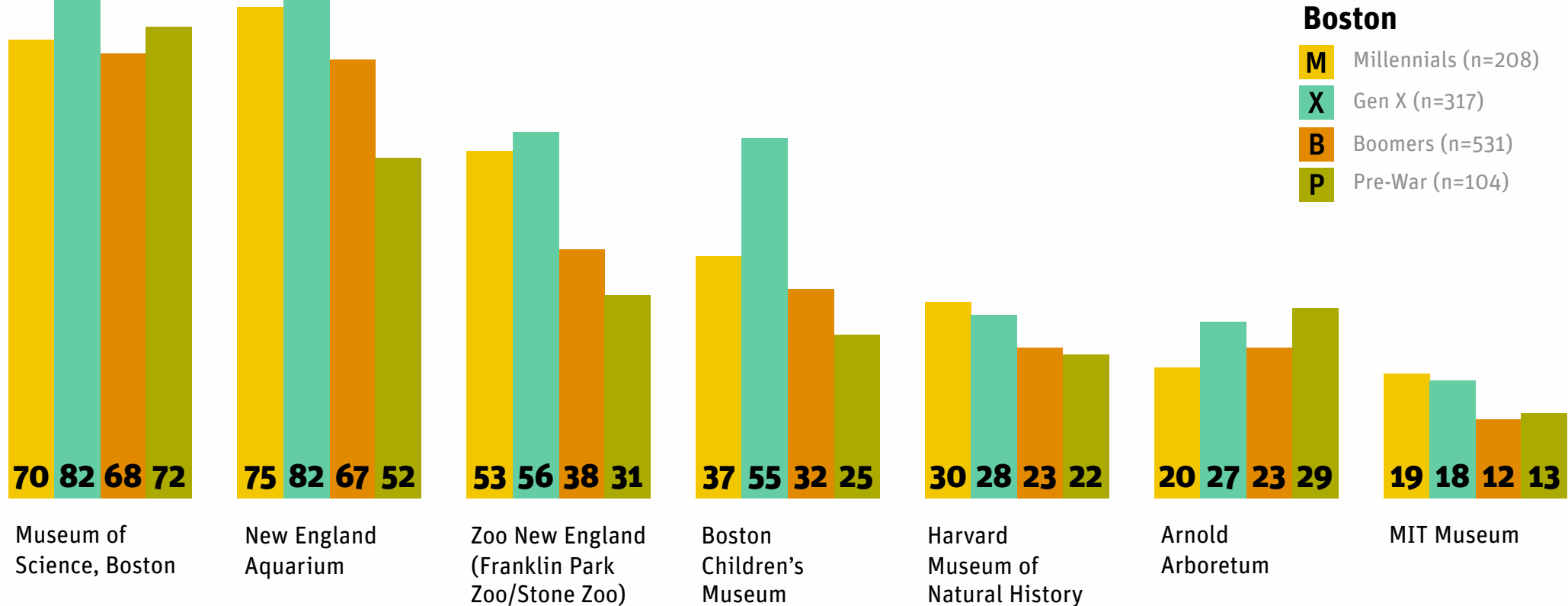
PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR (PERFORMING ARTS ORGANIZATIONS—BY GENERATION)

Boston

- M** Millennials (n=164)
- X** Gen X (n=281)
- B** Boomers (n=461)
- P** Pre-War (n=96)

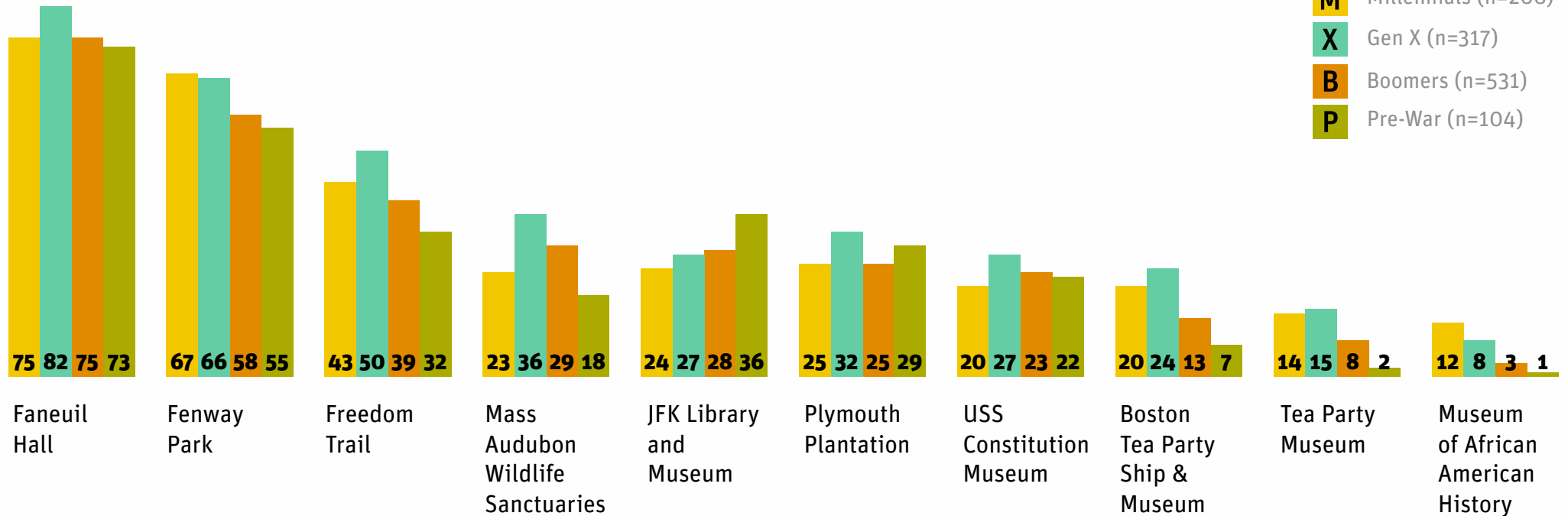
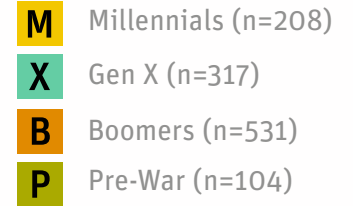


PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR (NON-VISUAL ARTS MUSEUMS—BY GENERATION)



PERCENT OF RESPONDENTS WHO ATTEND AT LEAST ONCE PER YEAR (HISTORIC ATTRACTIONS—BY GENERATION)

Boston



In Boston, the youngest audiences drive the market.

NUMBER OF CULTURAL ACTIVITIES ATTENDED PER MONTH (BY GENERATION)



National

- M** Millennials (n=680)
- X** Gen X (n=1203)
- B** Boomers (n=1803)
- P** Pre-War (n=340)

Boston

- M** Millennials (n=214)
- X** Gen X (n=344)
- B** Boomers (n=569)
- P** Pre-War (n=111)

Bostonians are also defining culture broadly ...

... and are very active in this expanded landscape.

A scenic view of a park with a lake, swan boats, and city buildings in the background. The lake is calm, reflecting the surrounding greenery and buildings. Several swan boats, which are green with white swan heads and orange seats, are docked at a small wooden pier on the left. In the background, there are lush green trees, including several large weeping willows, and a line of city buildings under a clear sky.

81%

define as a
cultural activity

81%

participate at least
once per year

national, state or municipal park

68%

define as a
cultural activity

63%

participate at least
once per year



Photo by Geoff Hargadon

street art

food and drink experiences

62%

define as a cultural activity

75%

participate at least once per year





an independent film at a theater

61%

define as a
cultural activity

59%

participate at least
once per year

SICKO
CRAZY LOVE
LA VIE EN ROSE
BOSS OF IT ALL

MONDAY AUG 6 AT 7PM THE BIG
3RD ANNUAL BOWLING PARTY EXT
MON AUG 13 AT 7PM WEST S
MON AUG 20 AT 7 PM CASAB

PHOTO BY LEE



non-commercial television

58%

define as a
cultural activity

89%

participate at least
once per year

77%

define as a
cultural activity

73%

participate at least
once per year

visiting a memorial



75%

define as a
cultural activity

71%

participate at least
once per year

art, craft, design, and furniture fairs

Motivators & Barriers

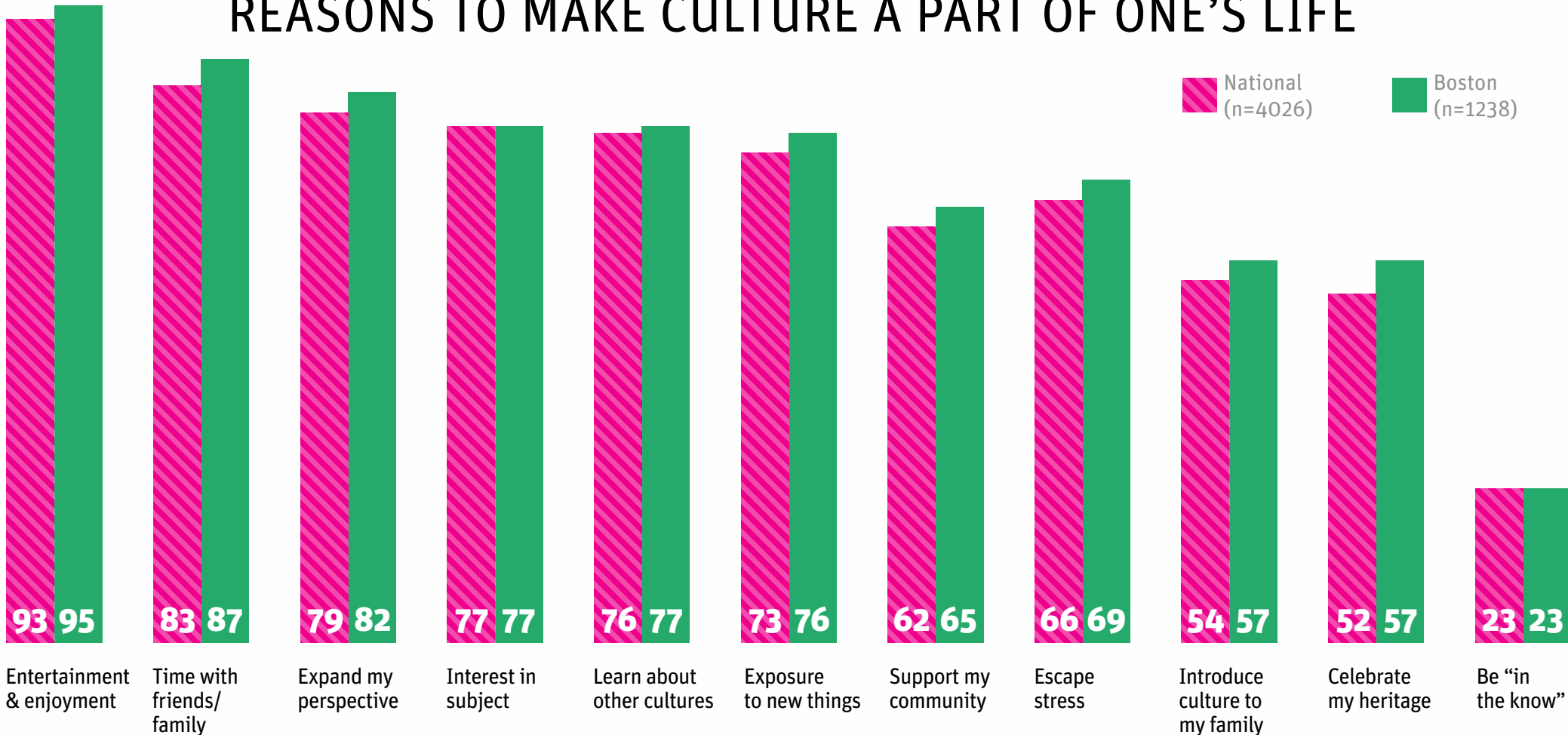
National and Boston
audiences are seeking both
entertainment and
enlightenment ...

... and it's less about being
“in-the-know” than it is about
being with who you know.

REASONS TO MAKE CULTURE A PART OF ONE'S LIFE

National
(n=4026)

Boston
(n=1238)



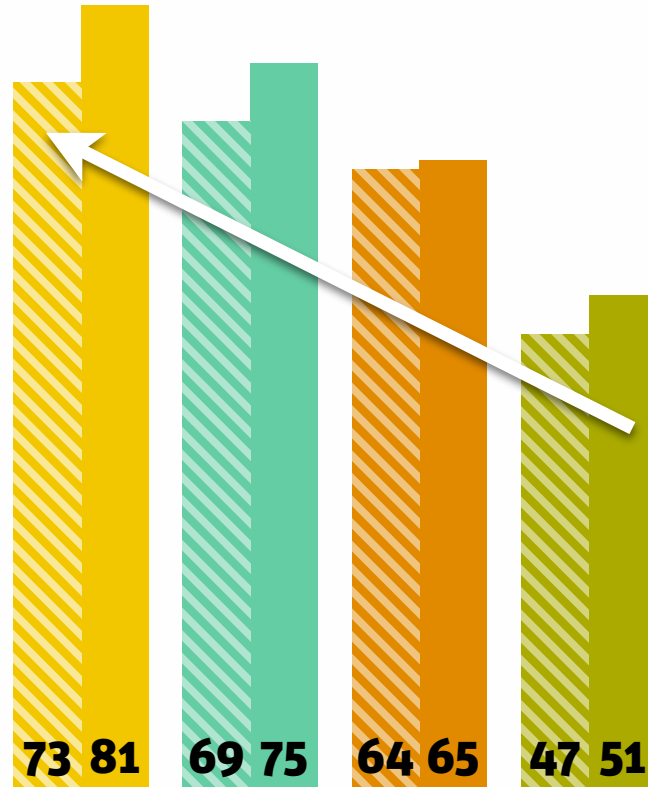
KEY INSIGHT: MOTIVATORS (1)

The young and the anxious: Boston's younger generations are stressed, and seeking culture for relief.



REASONS TO MAKE CULTURE A PART OF ONE'S LIFE (BY GENERATION)

Escape everyday
stress and
rejuvenate



National

- M** Millennials (n=680)
- X** Gen X (n=1203)
- B** Boomers (n=1803)
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Boston

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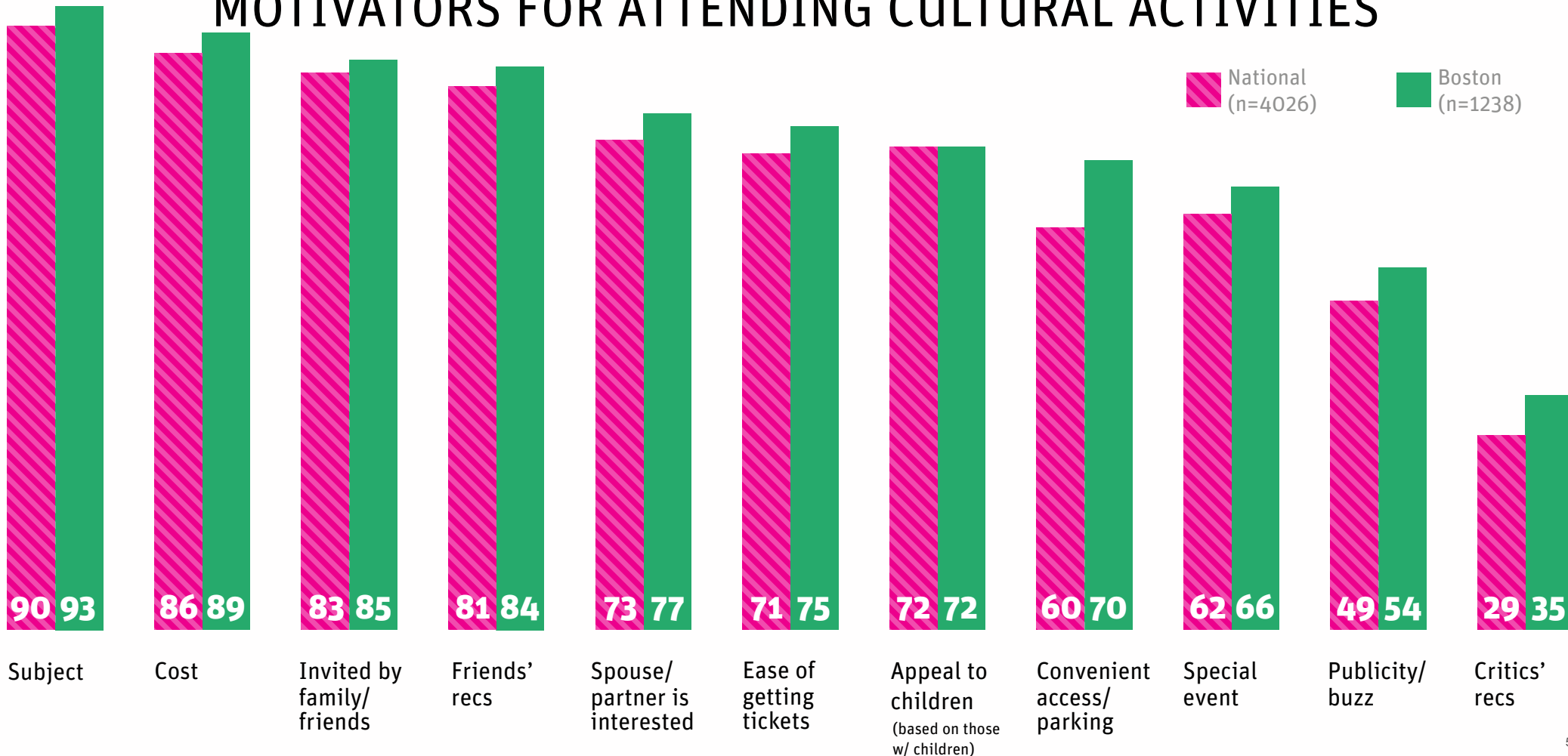
What drives participation?

Content, value, convenience,
and being social.

MOTIVATORS FOR ATTENDING CULTURAL ACTIVITIES

National
(n=4026)

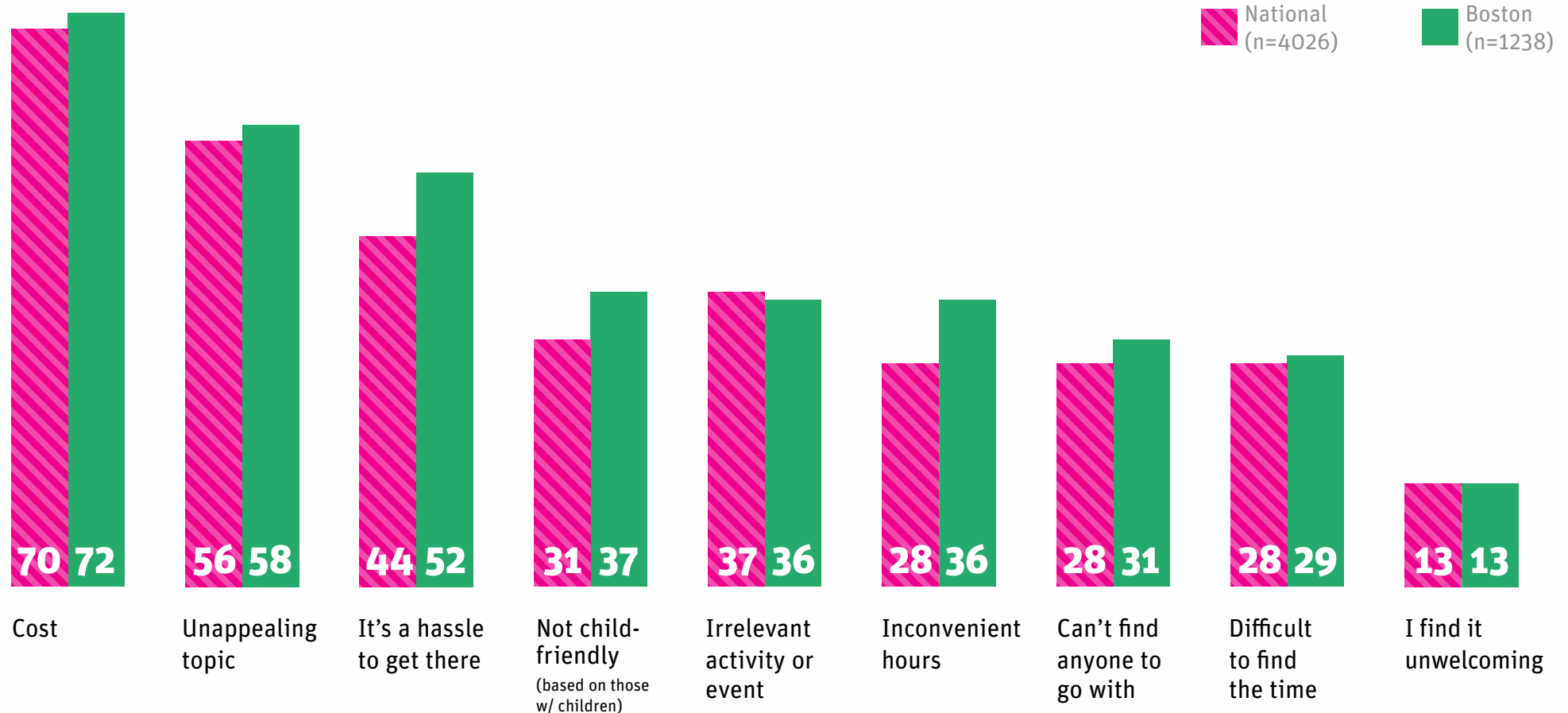
Boston
(n=1238)



What are the big barriers?

Cost, content and—
especially for Bostonians—
(in)convenience ...

BARRIERS TO ATTENDING CULTURAL ACTIVITIES





KEY INSIGHT: BARRIERS (2)

Traveling in packs:
Almost 1/2 of
Millennials won't
attend if it means
going alone.

BARRIERS TO ATTENDING CULTURAL ACTIVITIES (BY GENERATION)

Can't find anyone
to go with



Boston

- M** Millennials (n=214)
- X** Gen X (n=344)
- B** Boomers (n=569)
- P** Pre-War (n=111)

Information Sources

To learn what's going on
culturally, broadcast and
print still matter.

KEY INSIGHT: INFORMATION SOURCES (1)

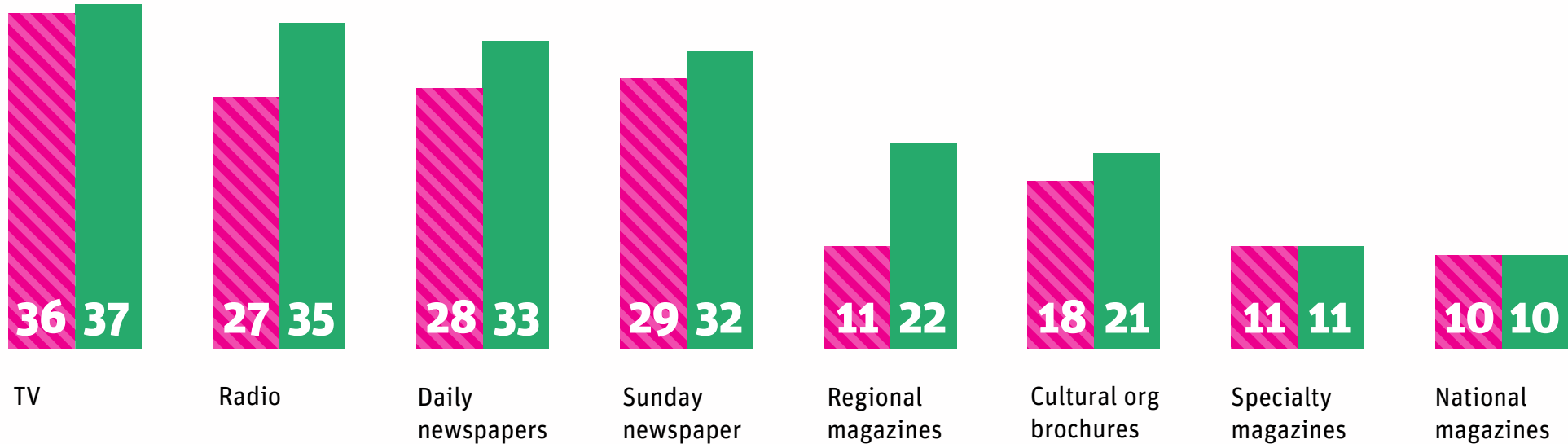
Regional pride:
Bostonians are
much more likely to turn
to radio and regional
magazines.



PRINT & BROADCAST INFORMATION SOURCES FOR CULTURAL ACTIVITIES (USED OFTEN)

National
(n=4026)

Boston
(n=1238)



Online sources aren't top-of-mind yet, but Bostonians are ahead of the curve.

ONLINE INFORMATION SOURCES FOR CULTURAL ACTIVITIES (USED OFTEN)

National
(n=4026)

Boston
(n=1238)



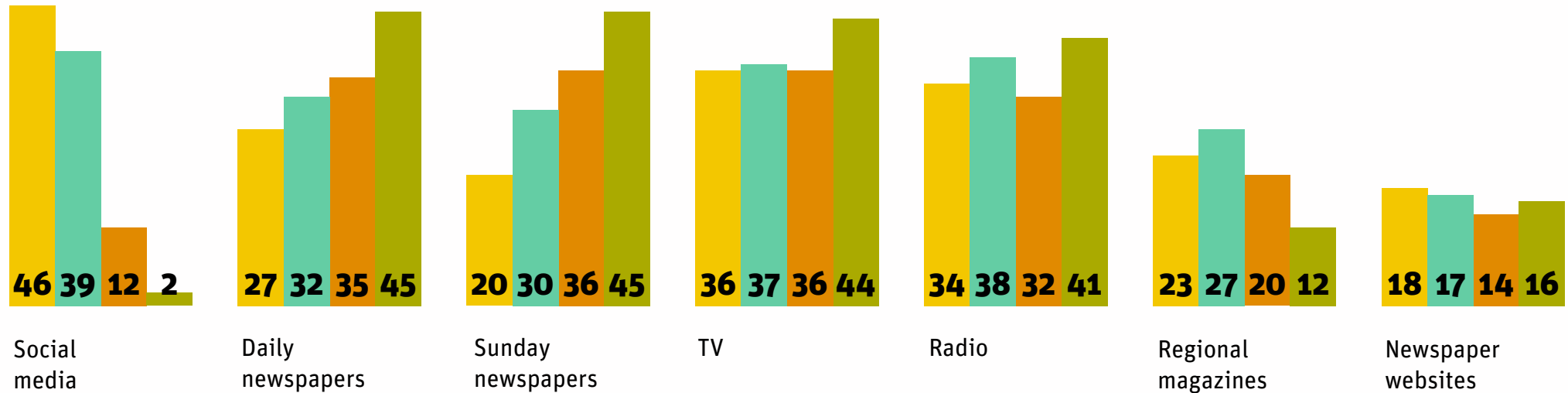
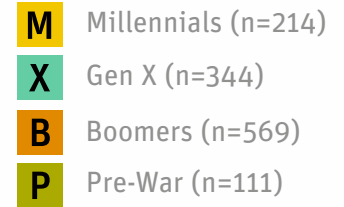


KEY INSIGHT: INFORMATION SOURCES (2)

For both younger generations in Boston, social media matters most.

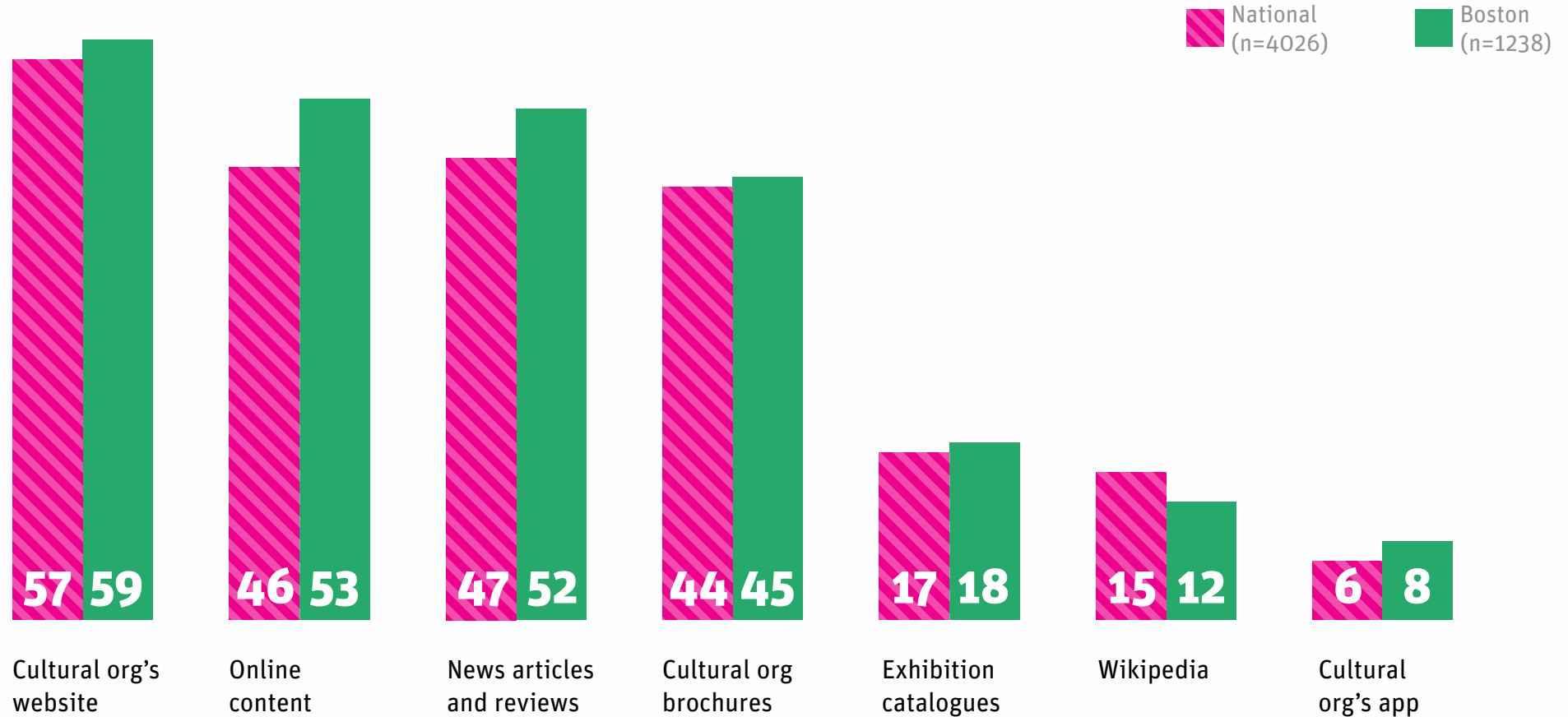
ONLINE AND MAINSTREAM SOURCES (BY GENERATION)

Boston



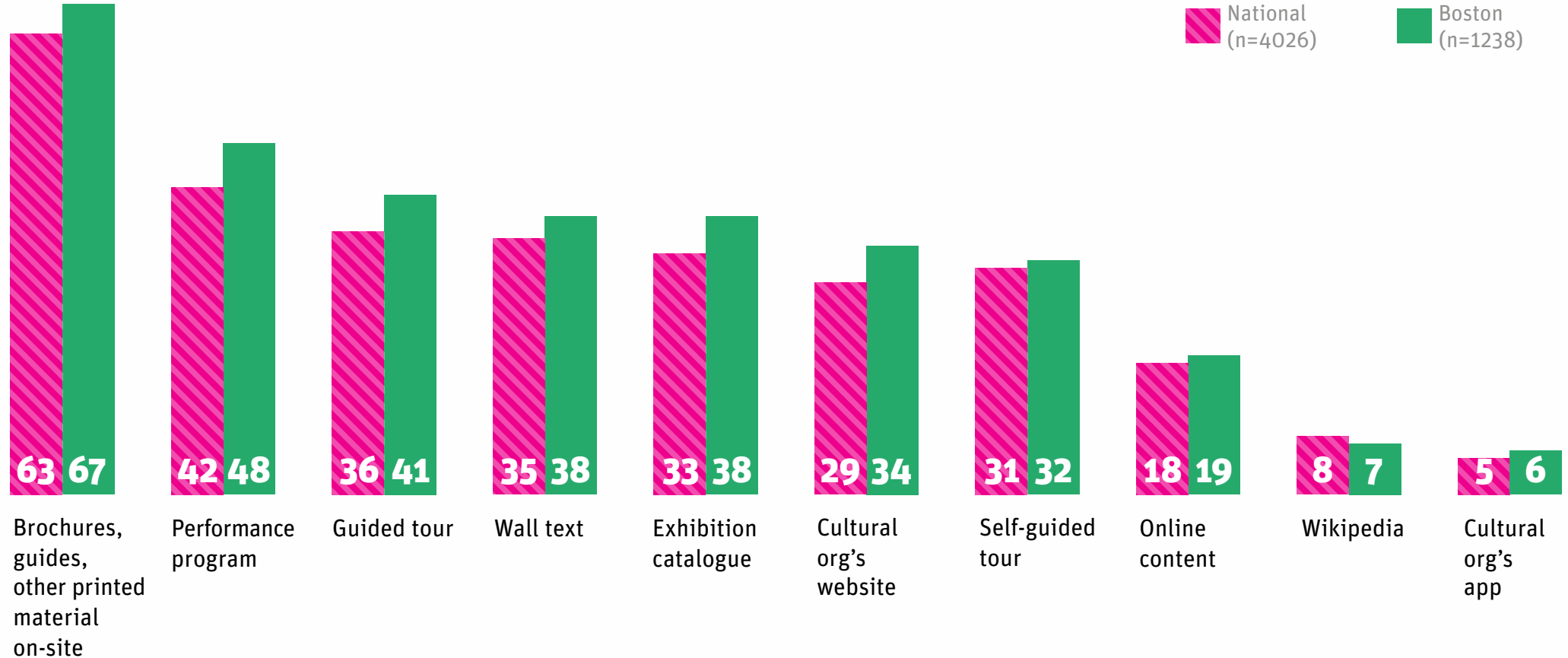
Bostonians are hungry for information, and seek it out to prepare for their visit ...

PREPARING FOR A CULTURAL EXPERIENCE



... and to enhance their
experience on-site.

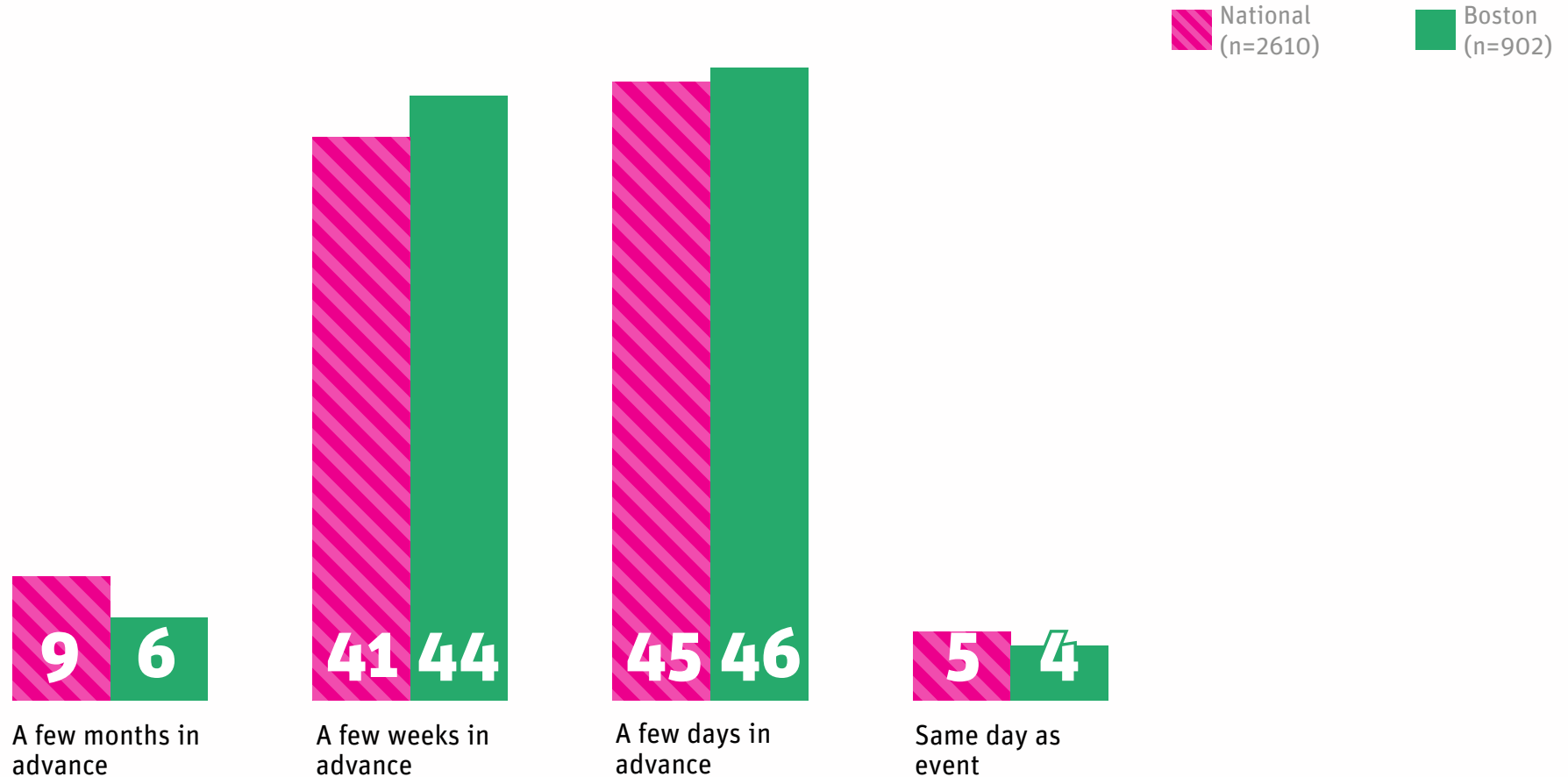
ENRICHING THE CULTURAL EXPERIENCE ON-SITE



Advance Planning

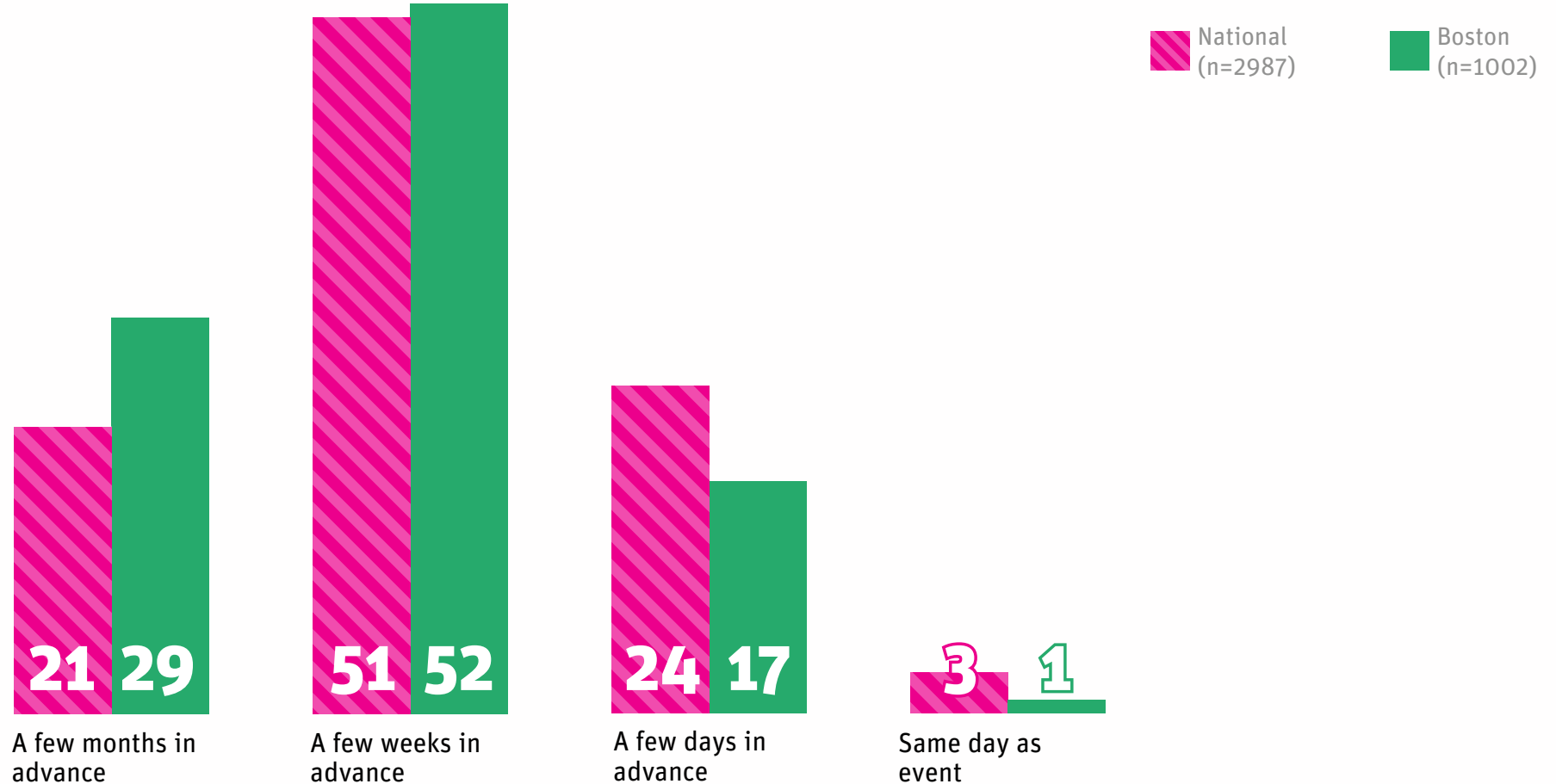
Planning a few days or weeks in advance is the trend for the visual arts.

VISUAL ARTS MUSEUMS ATTENDANCE PLANNING



For the performing arts,
people save the date
even earlier.

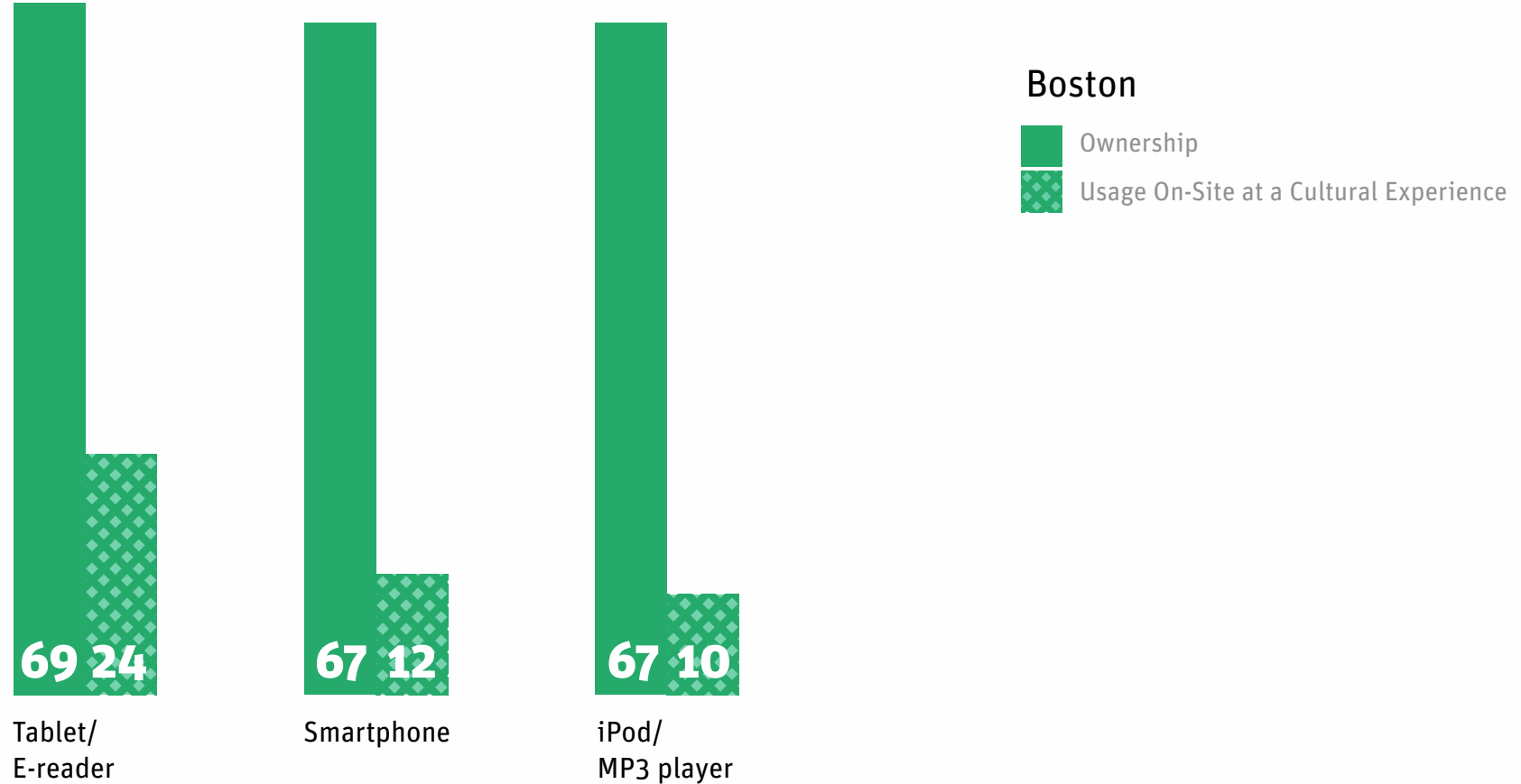
PERFORMING ARTS ATTENDANCE PLANNING



Technology

Bostonians are
hyperconnected,
yet few are using
mobile devices on-site ...

OWNERSHIP vs. USAGE OF MOBILE DEVICES ON-SITE



This is a transitional moment
for using technology in
cultural experiences ...

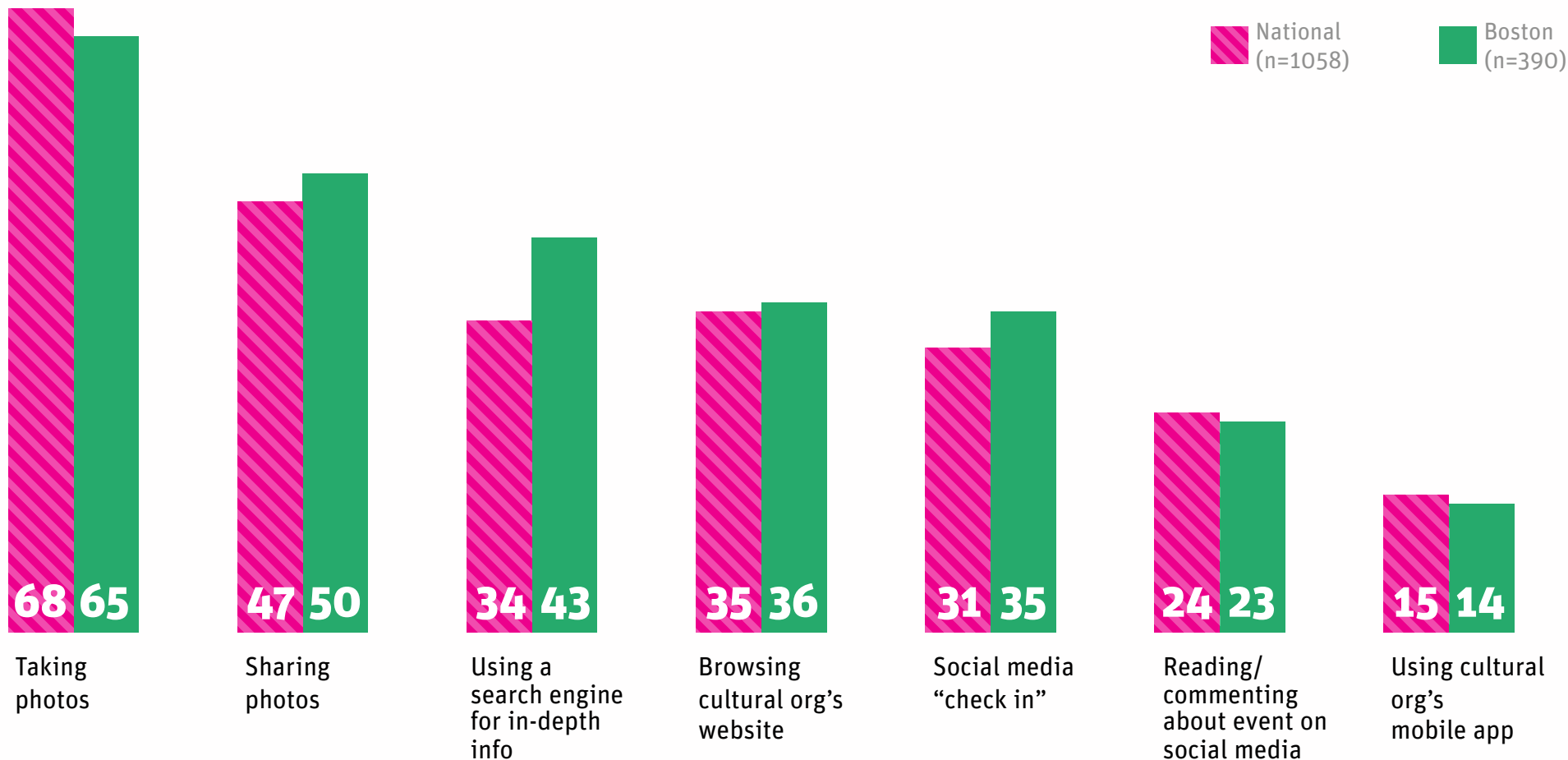
... and Boston, like the nation, is leading the way in defining these new norms.



KEY INSIGHT: TECH USE ON-SITE

The “selfie moment:”
Tech-savvy audiences
are all about taking
and sharing photos on
their smartphones.

MOBILE DEVICE ACTIVITIES (BY THOSE WHO USE A DEVICE ON-SITE)

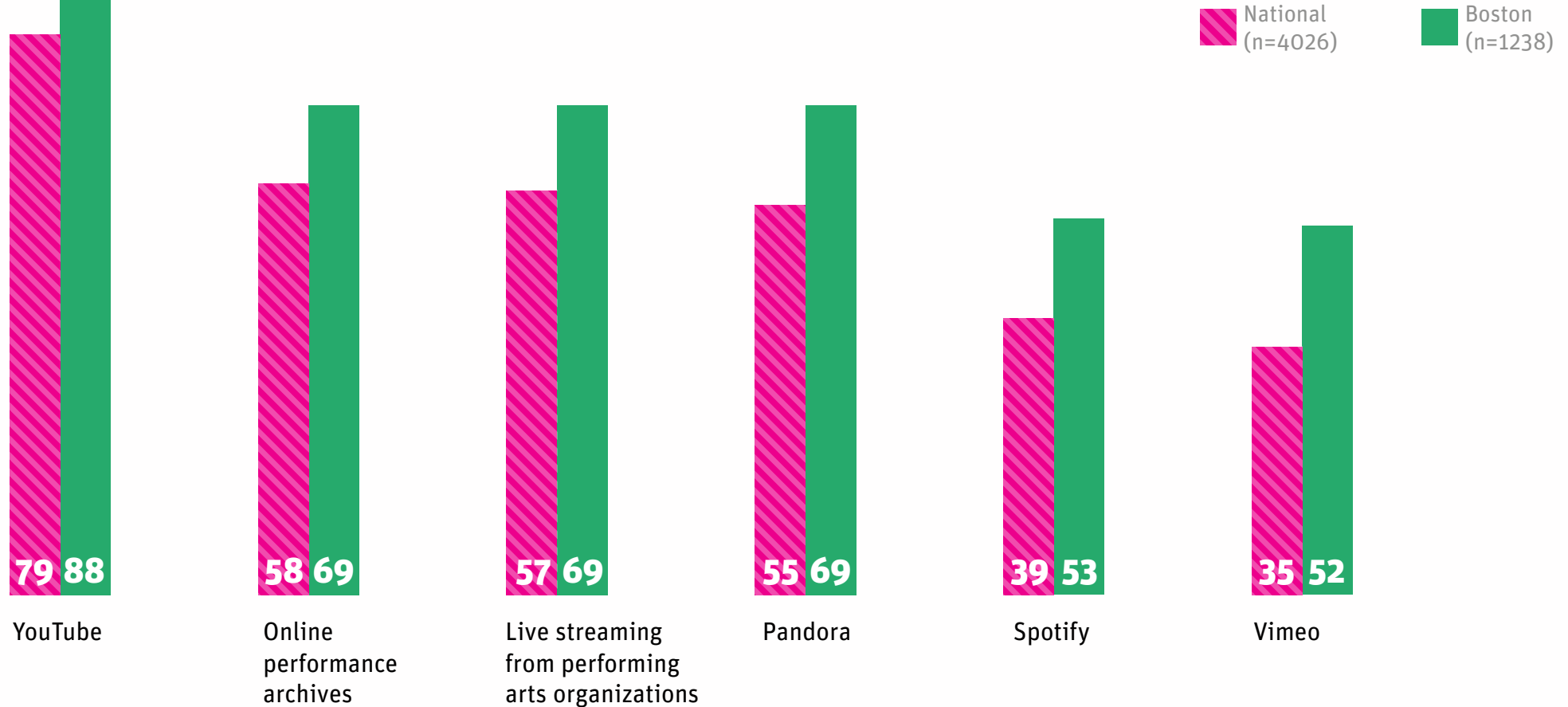




KEY INSIGHT: TECH USE OFF-SITE

Theater and take-out:
The number of
Bostonians using
technology to view
performances at home is
surprisingly high.

EXPERIENCING THE PERFORMING ARTS ONLINE

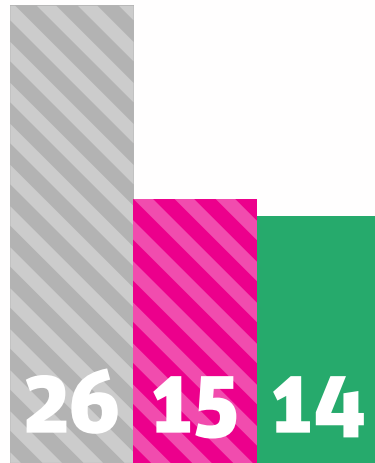


Audience Loyalty

Despite Bostonians'
high interest in culture,
loyalty is low.

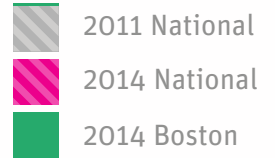
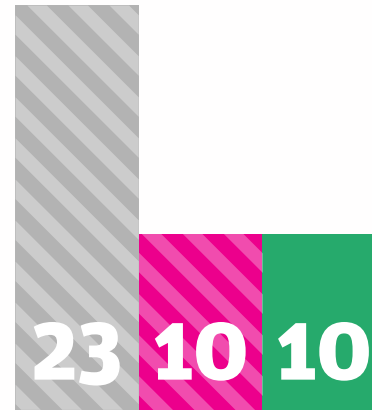
VISUAL ARTS

% w/Memberships



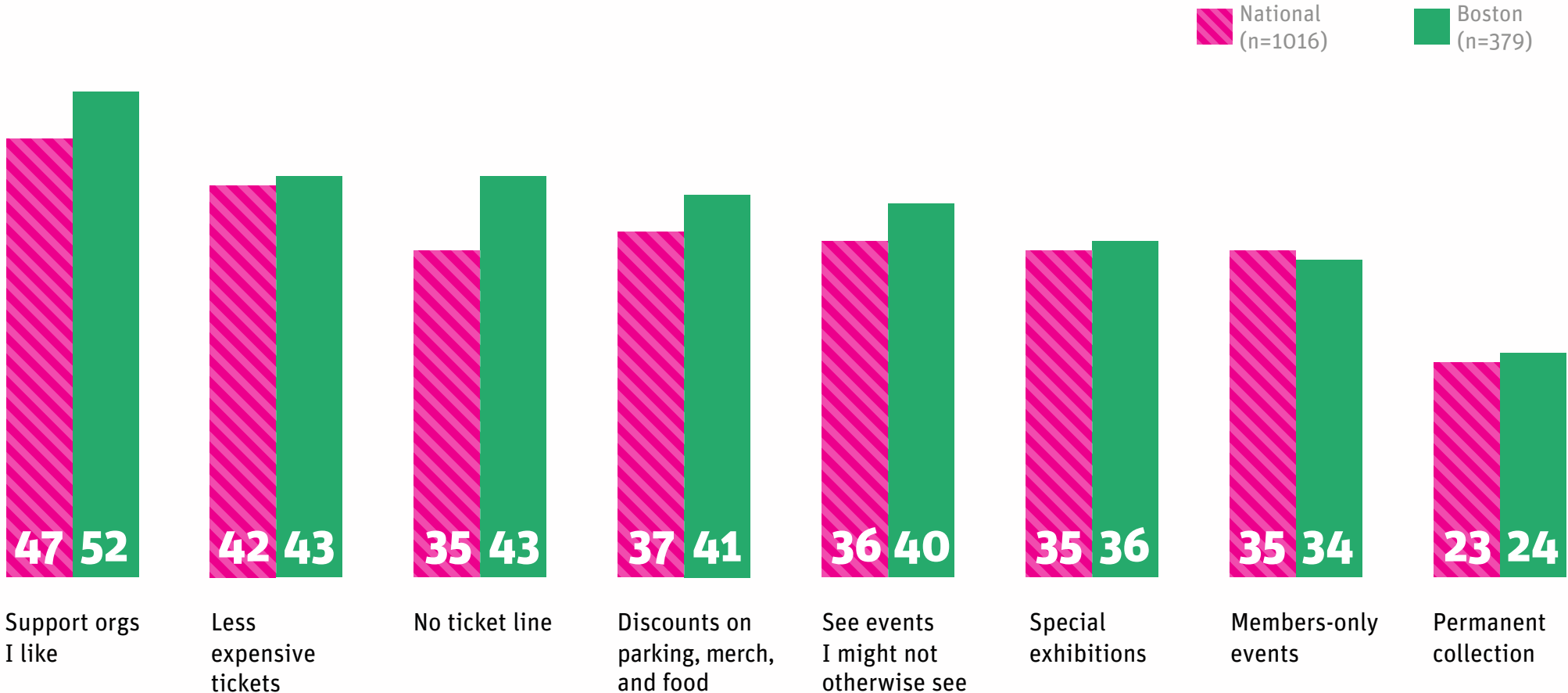
PERFORMING ARTS

% w/Subscriptions



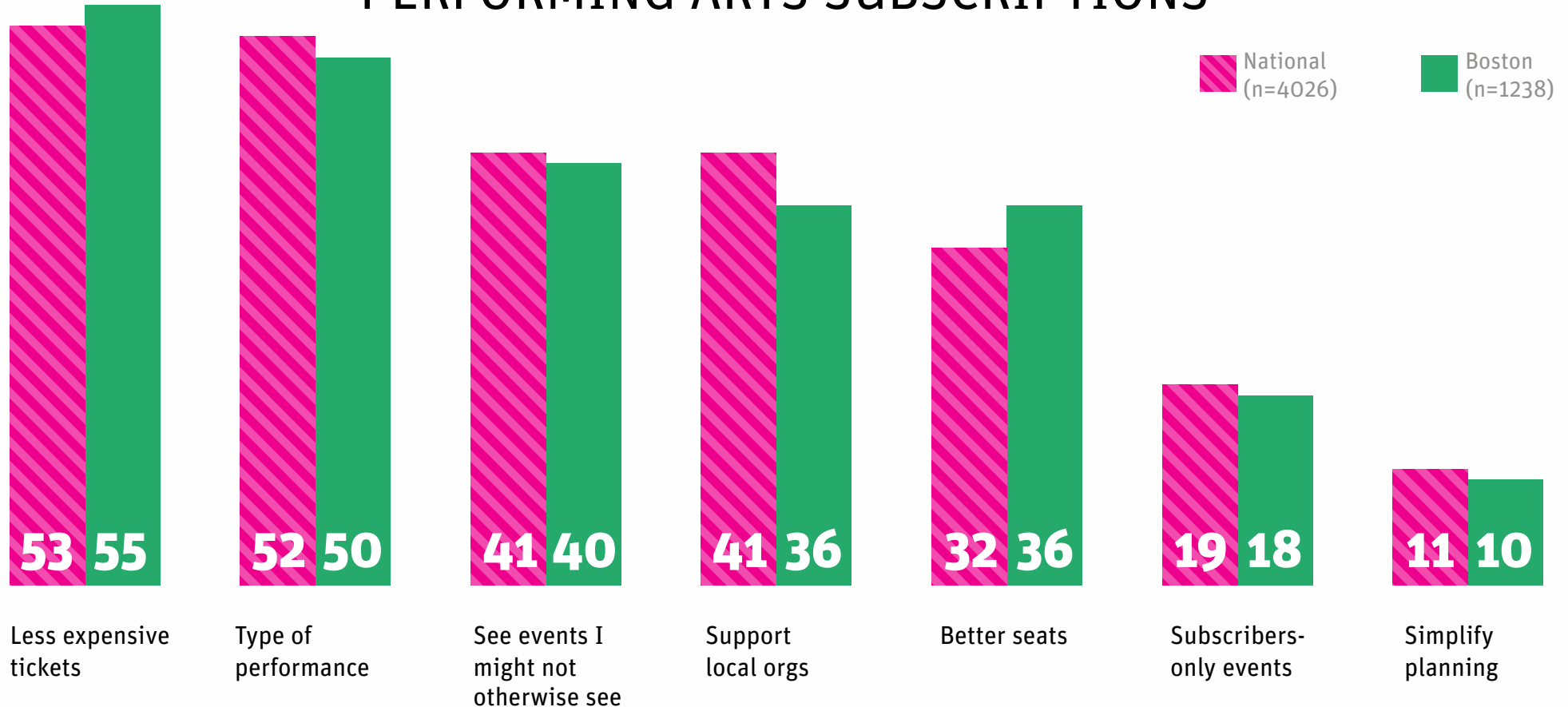
For visual arts membership,
affinity, value, and ease of
access matter most.

MOTIVATIONS TO PURCHASE OR RENEW VISUAL ARTS MEMBERSHIPS



For performing arts
subscribers, value and
content steal the show.

MOTIVATIONS TO PURCHASE OR RENEW PERFORMING ARTS SUBSCRIPTIONS

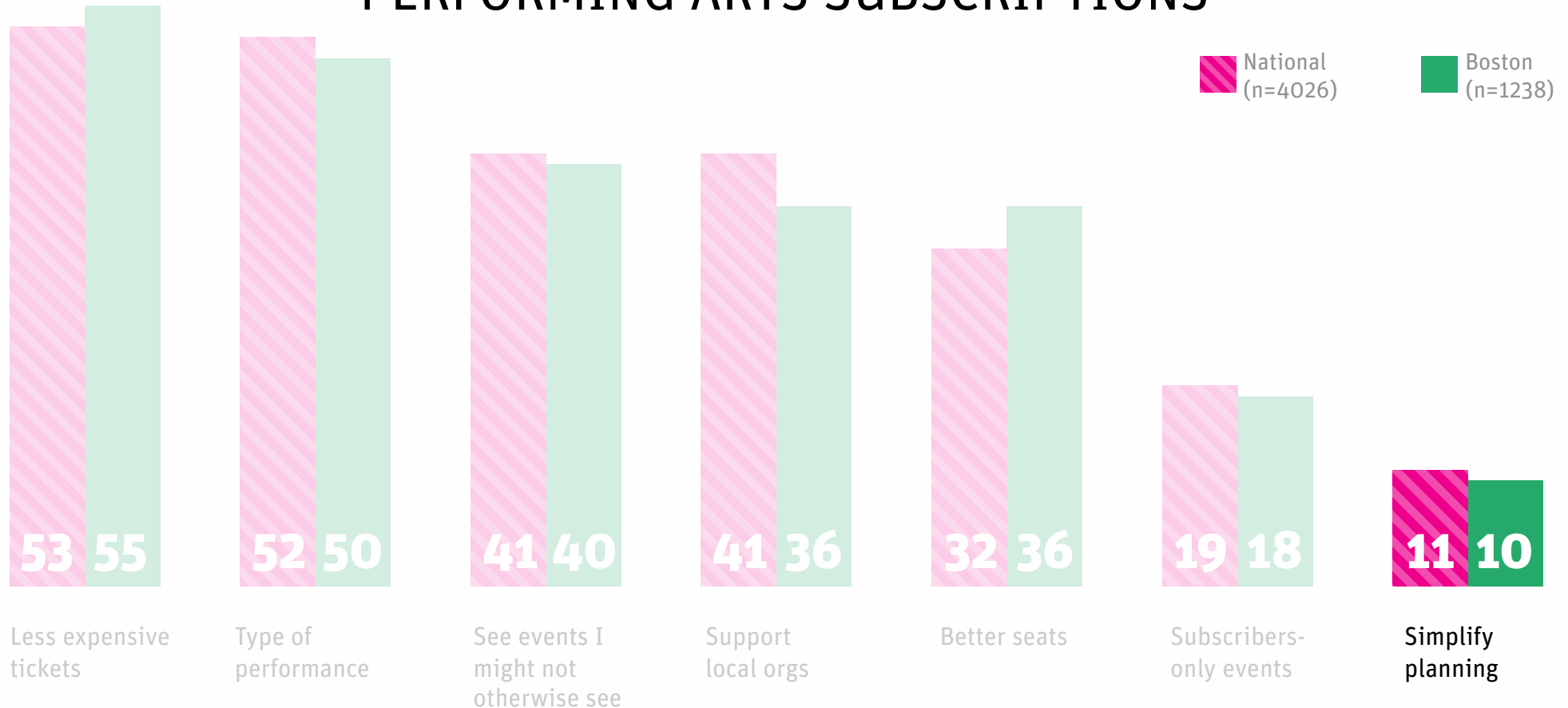




KEY INSIGHT:
PERFORMING ARTS
LOYALTY DRIVERS

DIY:
Fewer subscribers
want you to choose
for them.

MOTIVATIONS TO PURCHASE OR RENEW PERFORMING ARTS SUBSCRIPTIONS



Giving

Despite the long tail of the Great Recession, charitable giving in Boston is especially vibrant.

National

35%

Boston

40%

Plan to make charitable
contribution to cultural
organizations

Donors reward community
impact and organizations
they enjoy.

MOTIVATIONS FOR CHARITABLE GIVING TO CULTURAL ORGANIZATIONS

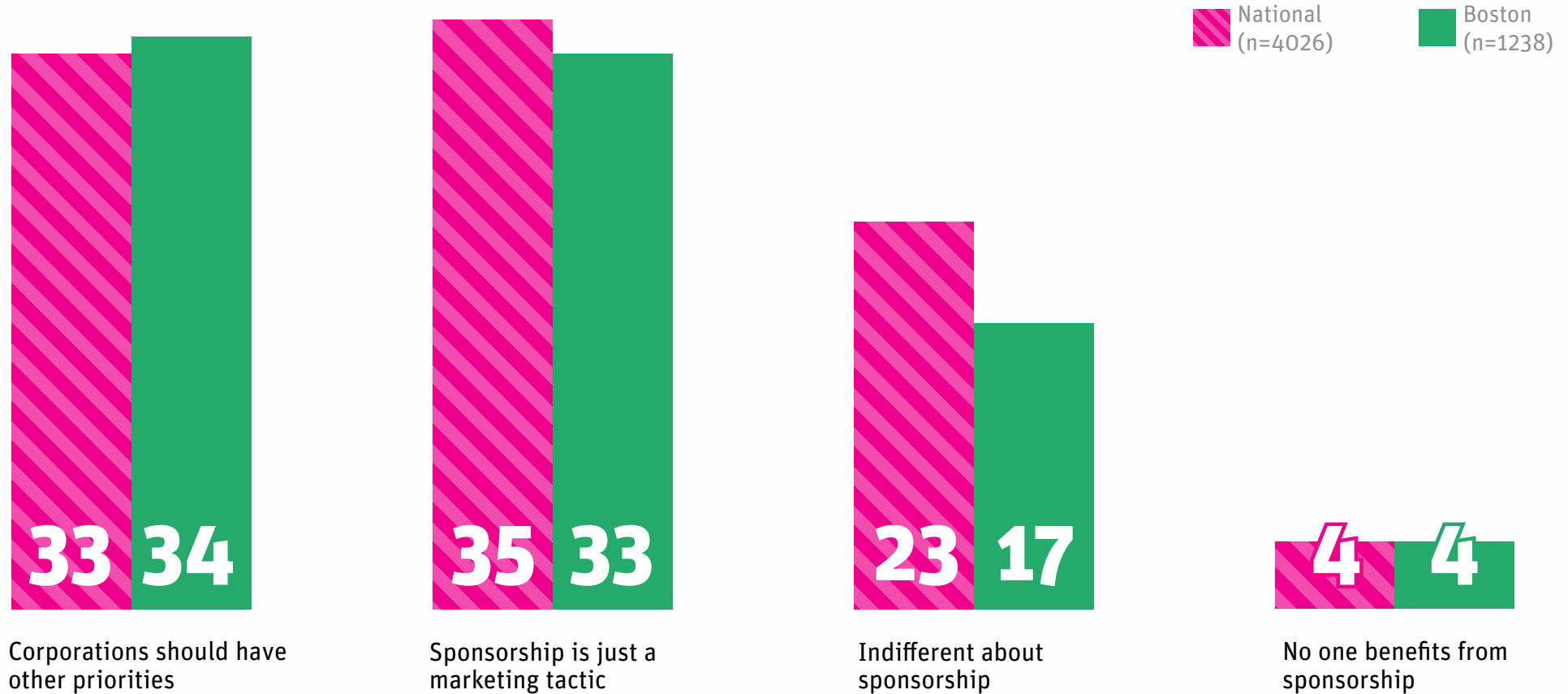


Sponsorship

Perceptions of cultural
sponsorship are positive
but nuanced.

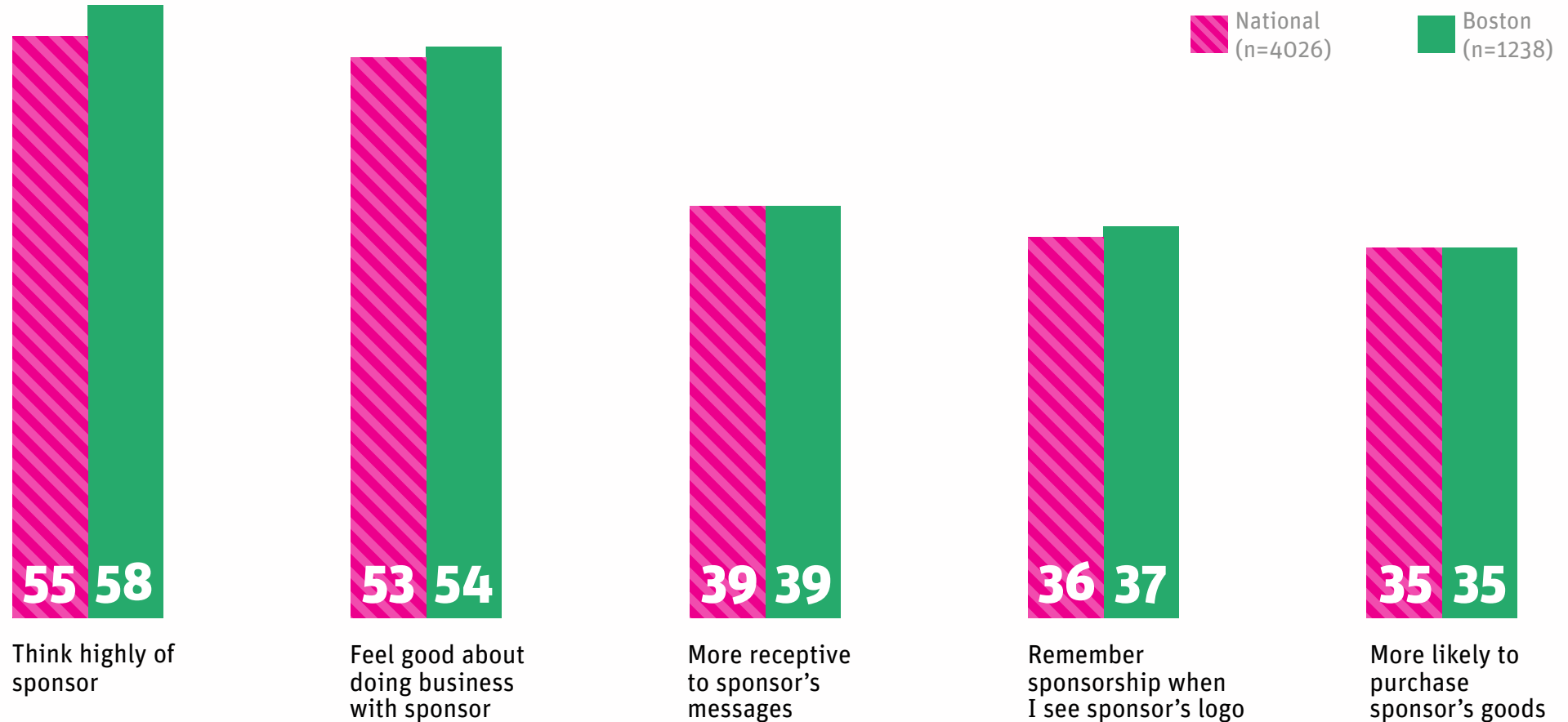
Many believe that
sponsorship is motivated
by marketing ...

NEGATIVE PERCEPTIONS OF CORPORATE SPONSORSHIP



... but cultural sponsorships
are admired nonetheless.

POSITIVE PERCEPTIONS OF CORPORATE SPONSORSHIP



What it means

What makes
Bostonians
different?

more stressed

more informed

more active

more open

What are
Bostonians
drawn to?

new perspectives

entertainment

family and friends

convenience

How can you
reach them?

broadcast

newspapers

regional magazines

cultural org.
brochures

cultural org.
websites

social media

YouTube channels

What's on tap for
the future?

primacy of
social media

integrated mobile
activities

redefined loyalty models

shifting attitudes
towards
sponsorship

expanding
definition of
culture

How do Bostonians
define culture?

“It enriches the spirit
and enlightens.”

“One that makes you
think about who you are.”



“Something that teaches
me something I have not
experienced before.”

“An enjoyable
experience for the
ears, eyes, or palate.”

“Something related to
our current time,
and reflecting our
communal identity.”

“It exposes me to a completely different world and opens my eyes...”

what do you think?
@mfaboston @laplacacohen
#culturetrackbos

Download Culture Track:
Focus on Boston at:
**MFA.org/
culturetrackbos**

ACKNOWLEDGEMENTS

THANK YOU TO THE FOLLOWING ORGANIZATIONS AND INDIVIDUALS
THAT MADE CULTURE TRACK 2014: FOCUS ON BOSTON POSSIBLE.

MUSEUM OF FINE ARTS, BOSTON

Malcolm Rogers, Director

Karen Frasca, Public Relations Director
Ed Gargiulo, Director, Membership
Katie Getchell, Deputy Director
Dawn Griffin, Senior Director, Communications
Michele Svirsky, Marketing Director

LAPLACA COHEN

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Isabel Hebert, Intern, Strategy and Branding
Allison Channing Jones, Strategist
Hil Moss, Strategist
Tom Zetek, Executive Creative Director

CAMPBELL RINKER

Dirk Rinker, President

Chris Coleman, Research Associate
Jennifer Spencer, Vice President of Custom Research
Rachel Underhill, Syndicated Research Manager

ABOUT THE MUSEUM OF FINE ARTS, BOSTON

The Museum of Fine Arts, Boston (MFA), is recognized for the quality and scope of its collection, which includes an estimated 500,000 objects. The Museum has more than 140 galleries displaying its encyclopedic collection, which includes Art of the Americas; Art of Europe; Contemporary Art; Art of Asia, Oceania, and Africa; Art of the Ancient World; Prints, Drawings, and Photographs; Textile and Fashion Arts; and Musical Instruments.

ABOUT LAPLACA COHEN

For 20 years, LaPlaca Cohen has helped many of the world's leading cultural and creative organizations build powerful connections and achieve greater impact through strategy, design, and advertising. All of our work is grounded in a strategic understanding of cultural audiences, which we gain through ongoing research and experience with clients who span the spectrum of the cultural world.

In order to further advance our thought leadership and deepen our understanding of cultural audiences at large, LaPlaca Cohen developed Culture Track (fielded six times since 2001)—a 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.

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