

The Shifting Sands of Demand: Trends in Cultural Engagement

GALA Choruses
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ENGAGE

THE SHIFTING SANDS OF DEMAND: TRENDS IN CULTURAL PARTICIPATION

Outline

1. The Changing Cultural Climate
2. Changing Consumer Behaviors
3. Changing Patterns of Participation
4. Discussion: Implications for GALA Choruses

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Part 1: The Changing Cultural Climate

The Shifting Sands of Demand: Trends in Cultural Participation

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Fantasy is Reality; Fiction is Fact

- Virtual lives
 - Online personas, virtual gaming, imaginary online communities
 - "Massively multi-player online role playing games"
- Celebrity culture
 - Celebrities have filled the symbolic void left by real cultural role models
 - Reality TV is fiction
- Rise of the gaming industry
 - The ultimate fantasy destination: Las Vegas
 - Lotteries - giant jackpots
- Backlash: Search for authenticity, realness
 - Can cultural programs and facilities become intermediary spaces where the virtual and real worlds meet?

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Demand for more stimulation

- Younger consumers are acclimated to multi-sensory engagement
 - Watching, hearing and reading simultaneously
 - Lighting at popular music concerts
- Experience learning, interactivity and edutainment
- Higher satisfaction thresholds
 - Expectation for immediate rewards and validation

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Proliferation of Choice

- Overwhelming number of leisure options in some markets
 - Glut of information about options
- Challenges our cognitive abilities
 - Cognitive chunking is the brain's response
 - Decision paralysis is likely
- Particularly troubling for arts groups with many diverse program offerings
- Implies greater need for "filters"
 - Unbiased recommendations, "guide to use"

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Diffusion of Cultural Tastes

- Fragmentation and diversification of tastes, both narrowing and broadening
 - Cross-cultural influences
- Enabled by advances in technology
 - Global distribution at the speed of light
 - Witness the impact of the download phenomenon on music preferences worldwide
- The net effect is rapid aesthetic development
 - More people enjoy more different kinds of art

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Definitional Boundaries Around the Art Forms have Blurred

- Consumers experience art along a continuum from “popular” to “high art”
 - What is dance?
 - What is classical music?
 - Whose definition matters?
- Rapid “remixing” of art, re-purposing of content
 - Slash fiction
- Consumers don’t put us in the boxes we put ourselves into
- Decreasing relevance of institutions that use a narrow or rigid definition of art

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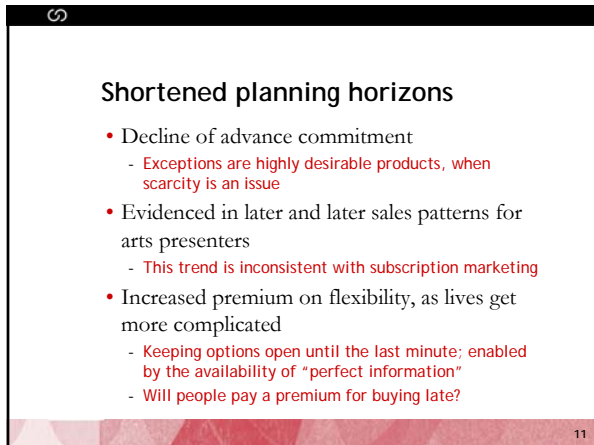
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Evolution of Cultural Norms

- From “snob” to “omnivore”
 - Richard Peterson, Vanderbilt University
- Shift in ideal: from fine arts sophisticate to world cultural citizen
 - A new kind of cosmopolitanism
 - Desire to make sense of the complicated world we live in
- Increased access to the art and artists of diverse cultures
- Inevitable move towards one highly interconnected mosaic of global cultures

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Increased demand for convenience

- Low threshold for opting out
 - Attractive, convenient alternatives
- Less willingness to drive, fight traffic
 - More at-home entertainment options
- Slow shift in population away from arts facilities in urban centers
- One response is venue diversification
- Looking forward, the challenge is being relevant to people in a range of settings

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The new calculus of risk and reward

- Less willingness to take risks, more willingness to pay large sums for a guaranteed “home run” experience
 - Evidenced by blockbuster phenomenon
 - Super-premium price points on Broadway
- Consistent with a pervasive trend towards “trading up”
- The rise of VIP culture or “the massification of luxury”
 - Creating the reality or illusion of exclusivity, status, prestige
 - The more everything becomes accessible, the more some people want to be separate
- Suggests demand for value-added, premium arts experiences

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Migration toward electronic info. acquisition

WEB USAGE BY AGE COHORT: ALL RESPONDENTS

Age Cohort (n)	% w/Any Web Tix Purchase History	% Ever Visited LWT Web Site	% Ever Purchased Tix Off LWT Site	Cum. % of Total Sample
Age 18-34 (n=21)	~95%	~80%	~30%	~5%
Age 35-44 (n=59)	~90%	~70%	~20%	~10%
Age 45-54 (n=171)	~75%	~55%	~15%	~15%
Age 55-64 (n=237)	~70%	~45%	~10%	~20%
Age 65-74 (n=180)	~55%	~35%	~5%	~25%
Age 75+ (n=148)	~35%	~15%	~5%	~30%

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Increased reliance on word-of-mouth


- Lower consumption of traditional media
 - Fragmentation of the media; absence of the critical voice
 - Proliferation of personal communications technologies
- Reaction to glut of information: hunger for “unbiased” filters
- Proliferation of online Word-of-Mouth tools
 - Peer-to-peer and viral marketing tactics
 - Online invitation tools, ticketing systems that integrate with Facebook; Instant Encore (iPhone apps)
- Shifting focus to the ‘total customer experience’

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The Online Social Networking Phenomenon

- Proliferation of online social spaces
 - Facebook.com, MySpace.com, Twitter, Friendster.com, Care2Connect.com, CrowdFactory.com, Tribe.net, LinkedIn.com, Gather.com
- Still a new frontier for the arts sector
- Concurrent rise in real life social networks
 - Book clubs, film clubs, play groups
 - The Cellular Church



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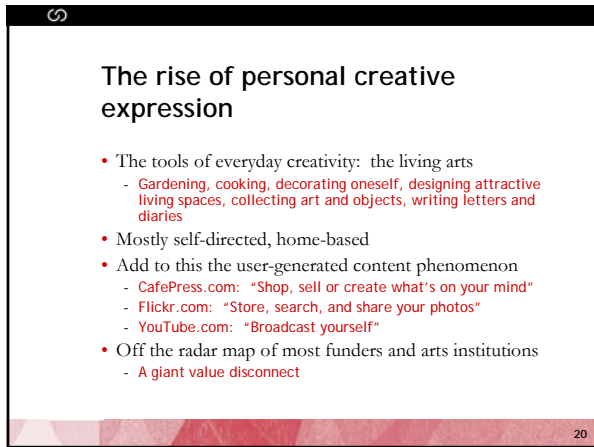
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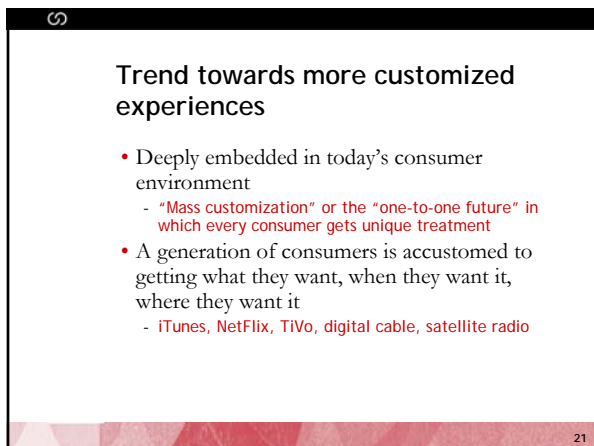
Growing awareness that social context drives arts attendance

- Who do I want to spend time with?
- Absence of social context is a major barrier to participation
 - Examples: ‘spousal taste discordance’; new to the area
- People construct all sorts of social groups around arts experiences
 - Groups of co-workers, college alumni groups, church groups, small family groups, friendship groups
- We are in the business of creating social experiences for people, a part of which is art
- New emphasis on personal, direct selling

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More demand for active engagement opportunities

- Consumers are demanding more intense, more meaningful experiences
 - We are entertaining a generation of experience learners
- Evidenced in higher rates of “personal participation”
 - The rise in amateur art making, art collecting (e.g., home-made music recordings)
 - Part of the “Pro-Am Revolution” (i.e., professional amateurs such as bloggers, astronomers, singers)
- Art for a compressed, impersonal, anxious society

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Shift towards interpretation-rich arts experiences

- Overall trend towards engagement and “experience enhancement”
 - Slow, fitful innovation process
- Improving “readiness to receive”
 - Martha Graham company - introductory videos
 - Advance mailing of program notes, synopses
- More contextual programming
- Embedded interpretation
 - Audio guide content on cell phones
 - Supertitles at the Opera
 - Concert Companion at classical music concerts

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The Culture of Instant Feedback

- Consumers are more and more accustomed to being asked for feedback on everything
- Entire business models in the commercial sector are based on customer feedback (e.g., Amazon)
- New tools like Twitter serve as real-time feedback mechanisms

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Big Thoughts

- World cultural citizens
- Filters help people make choices
- Importance of social context
- Improving “readiness to receive” by managing the ‘total customer experience’
- Giving customers more choices to make
- Engagement, experience enhancement, intensity
- Making connections to personal creativity at home and at work