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Spotlight on Arts Audiences

Wave 1 Results
December 2023

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Thank you to our generous partners

This initiative is being funded by arts funders who are keen to use data to drive engagement and growth strategies across Alberta.

We thank them for their generous support.

A collaborative and evolving resource:

Purpose & Objectives:

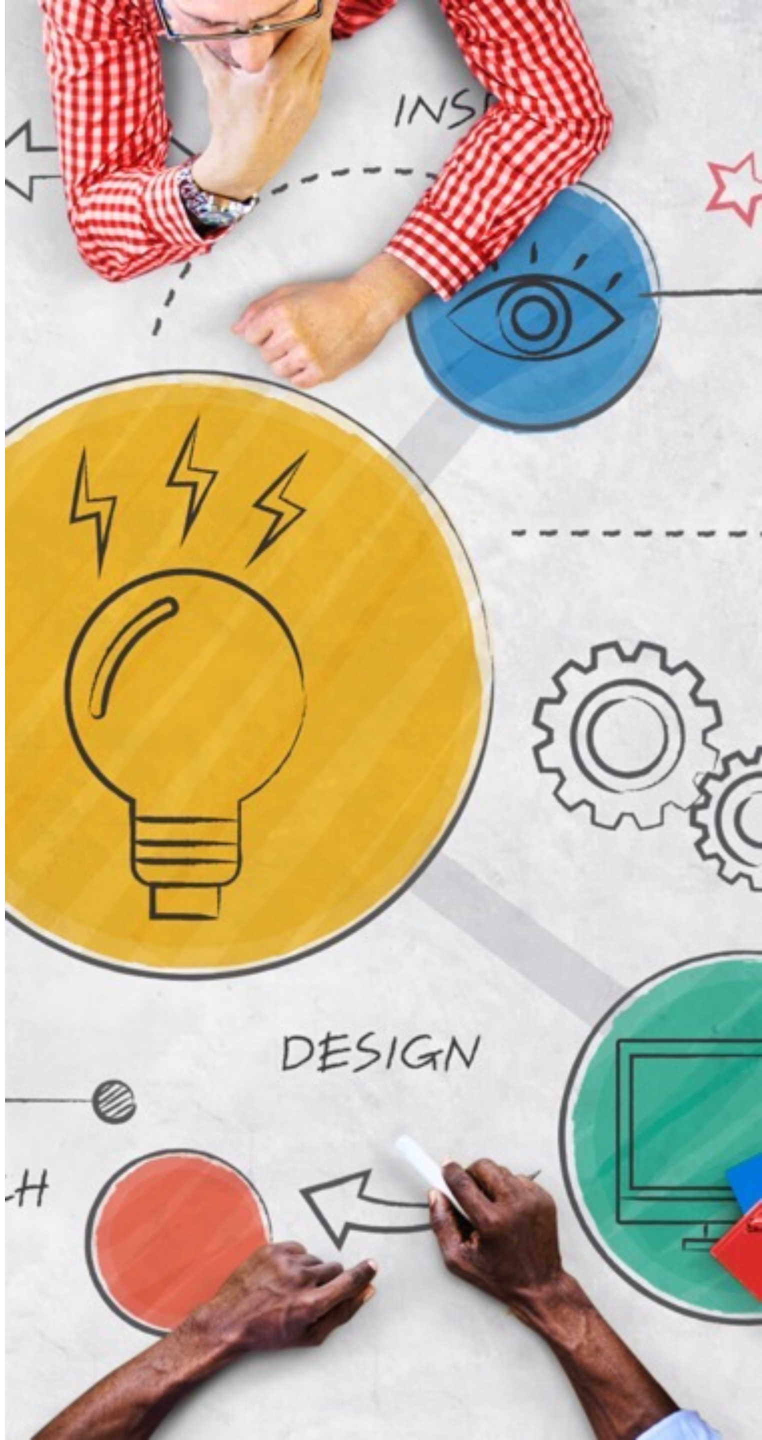
Alberta continues to be at a crossroads brought by a pandemic that has changed public life and re-shaped our economy. This is especially true in the arts sector which continues to experience a decline in engagement with events and activities. This work was developed for this sector exclusively. It builds upon research that began in 2020 but is designed to provide specific, relevant and reliable facts to support the leaders in the arts sector as they **build relevance and grow attendance.**

Key topic areas for Wave 1:

- Understand current behaviours, habits and patterns
- Understand current attitudes and perceptions towards the arts
- Understand barriers to engagement and support
- Exploring programming and communication preferences
- Understand perceptions of value

How to use this report:

This work is designed to be shared. We encourage our partners to distribute and actively apply the insights to their business. The ultimate goal is to build on collaboration by sharing resources that can drive smart and focused engagement strategies.



Research Approach:

This report represents the first of six (6) waves of work.

The survey was delivered to a representative sample of arts receptive Albertans, ages 18+. In order to qualify for the survey, respondents had to indicate interest in at least one art form.

A total of n=1,160 surveys were collected across the following regions:

- Calgary + area (n=400)
- Edmonton + area (n=400)
- Northern AB (n=120)
- Southern AB (n=120)
- Central AB (n=120)

The survey was conducted between November 6^{th} -16^{th}, 2023.

An approximate margin error for a typical sample size of n=1,160 is +/- 2.9% (which is not typically applicable for online non-probability samples).

For the purposes of this report, the focus is on the full market. Results are not weighted to population but are instead designed to provide a directional overview of province-wide trends. Breakouts by region are provided where relevant and regional reports for Edmonton, Calgary and other markets will be made available.

Contexts (always) matter

The economics of life: Spending power in Canada decreased through the pandemic and cost of living is currently identified as the most significant issue by Albertans by a healthy majority. Furthermore, Canada Helps reports that at least 20% of Canadians are accessing charities/social services for basic necessities (most of them for the first time). Even with inflation easing, Canadians are paying more for goods and services and feeling constrained. This has an important impact on discretionary spending.

Rising costs of doing business: When spending is constrained, businesses experience a slow in demand. This, coupled with labour challenges (high inflation pushes workers to push for wage increases and the ramp-up from cutbacks during the pandemic has not fully rebounded) means organizations are looking to cover higher costs with (potentially) fewer patrons.

Declining support: Donations are down for most arts organizations. Recent research from Nanos/Council for Business and the Arts in Canada reported that among those who have donated, the amount was nearly a third lower than what they expected to give AND represents only 11% of their annual charitable giving.

https://www.canadahelps.org/en/the-giving-report/
http://www.businessandarts.org/wp-content/uploads/2023/11/2023-ARTS-November.pdf

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Key Findings and Implications

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1) There is an audience to activate

At the highest level it is important to recognize that arts experiences remain an area of interest to the vast majority of Albertans. Engagement with the arts is strong – in fact, only 5% are *not* connecting with arts experiences in any way. And, the arts are an important part of day-to-day life for swaths of the market. This basic interest is a simple reminder that audiences have not disappeared.

Engagement rates show there are key segments that are involved quite actively – these are people connecting to the arts in multiple ways and are likely the core audiences attending events and supporting the sector. This accounts for only 42% of the province. The rest are more passively connected. These passively connected Albertans are the group that needs to be activated to sample arts experiences more widely. They are a segment of tremendous opportunity.

The goal is not about creating new arts enthusiasts. They already exist and need to be reached in a way that will leverage their basic interest and activate their participation more widely in specific activities.

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2) The competitive environment is fierce because we share audiences with so many other experiences

In some ways, garnering more engagement can be reduced to a calculation of available time. In the simplest terms, the sector is competing with many other things to get more time from audiences. Results show organizations will be mainly competing for about 15 hours per week of available free time. Those 15 hours are what Albertans are using for dining, fitness, self-directed recreation, shopping and more. There may be more hours to capture from time allocated for non-directed relaxation/down-time. Regardless, the competitive environment in which the sector is operating is fierce.

This means its important to resolve barriers as well as leverage motivations. The main barriers to address are all related: value, relevance, and convenience.

3) Building relevance

A basic challenge in activating audiences to attend is the *nature* of arts experiences offered by organizations. Unlike other offerings in the experience economy like dining, fitness or self-directed recreation, few arts events are set up to attract repeat audiences for the same show. This means organizations have to establish a fairly wide reach of unique visitors and depend less on repeat attendance to each showing.

For the deeply engaged groups this will be a matter of simply reminding and driving awareness. These *immersed* and *engaged* segments already have the habit of attending, observing, supporting or creating and spend their available time doing these things. The main barrier to encouraging more attendance from this group is time.

Reaching the *passives* is a different exercise. The main barrier is revealing the relevance of the experiences being offered and how they deliver benefits that align to their motivations. On top of all that, doing that in a way that connects in the audience's language. For this group, relevance and value will be communicated with the promise of an emotional return, personal inspiration, social/shareable experiences and uniqueness. These are broad motivations not easily communicated – they are more 'why' messages that focus on benefits instead of 'what' messages that elevate features.

4) Understanding cost barriers in terms of showing value

In terms of stated barriers, costs or being expensive are an age-old outlet consumers use when they don't see value or understand the relevance of an experience being offered. Yes, it is important to recognize that household income has decreased for 33% of Albertans in the past three years. This, along with inflation and increased borrowing costs, make consumers much more selective and attune to the value they will get out of spending. So lowering prices is helpful but not a panacea on its own. Organizations will have to show value in order to compete.

Communicating value will be a matter of consumers knowing an experience will be:

- Emotionally satisfying and compelling them to feel something – happy, sad, laughter
- Be enjoyable to share with others
- Be unique and exclusive – something they have not seen before
- Inspiring

Being a good deal, offering extras, elevated service and even educational are helpful but secondary.

5) Importance of remarkable

At the intersection of showing **value** and **relevance** is the notion of remarkable experiences. Remarkable experiences are inherently relevant and easily connote value. Beyond the art form itself, leaders could be thinking about their programming and marketing in these terms. But, what makes for a remarkable experience?

a. The top requirement is that an experience or content work to make audiences *feel something* - happiness, sad, anything. This is the primary element.

b. Given the challenging and turbulent environment, its no surprise that secondary qualities are those things that are *fun* or offers content that makes people *laugh*.

c. A third element is an experience or content that offers an *escape* – this can be experiences that are also *immersive*.

d. Being unique/different, transformative and unexpected are also valuable components but will be more important to already immersed arts audiences.

More than just a recipe list, these qualities of remarkable are the foundation of both relevance and value. Organizations can strongly consider how to communicate these essential qualities in their marketing or deliver them in their programming in order to activate more of those Passive audiences.

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6) Defining commitment

Perhaps the most valued form of audience commitment is deeper financial support exhibited by donations or purchasing subscriptions. This has long been a marker of success for arts organizations. The challenge is that consumers are changing how they purchase arts experiences in response to an increasingly competitive environment and shifting personal circumstances.

Existing research already demonstrates how giving to the arts has softened broadly (see page 6). And among the 35% who've ever had a subscription, 18% indicate they have let it lapse. But these audiences are not going away – they're just shifting how they consume the experience. Subscriptions can still be useful supplement for support (especially if patrons see it as a support and sharing tool) but what audiences are really looking for is value and flexibility. Knowing and thinking about the decline in subscriptions (and why) is a stark reminder about the importance of **reach across the market** and working to continually attract a newer and more diverse audience.

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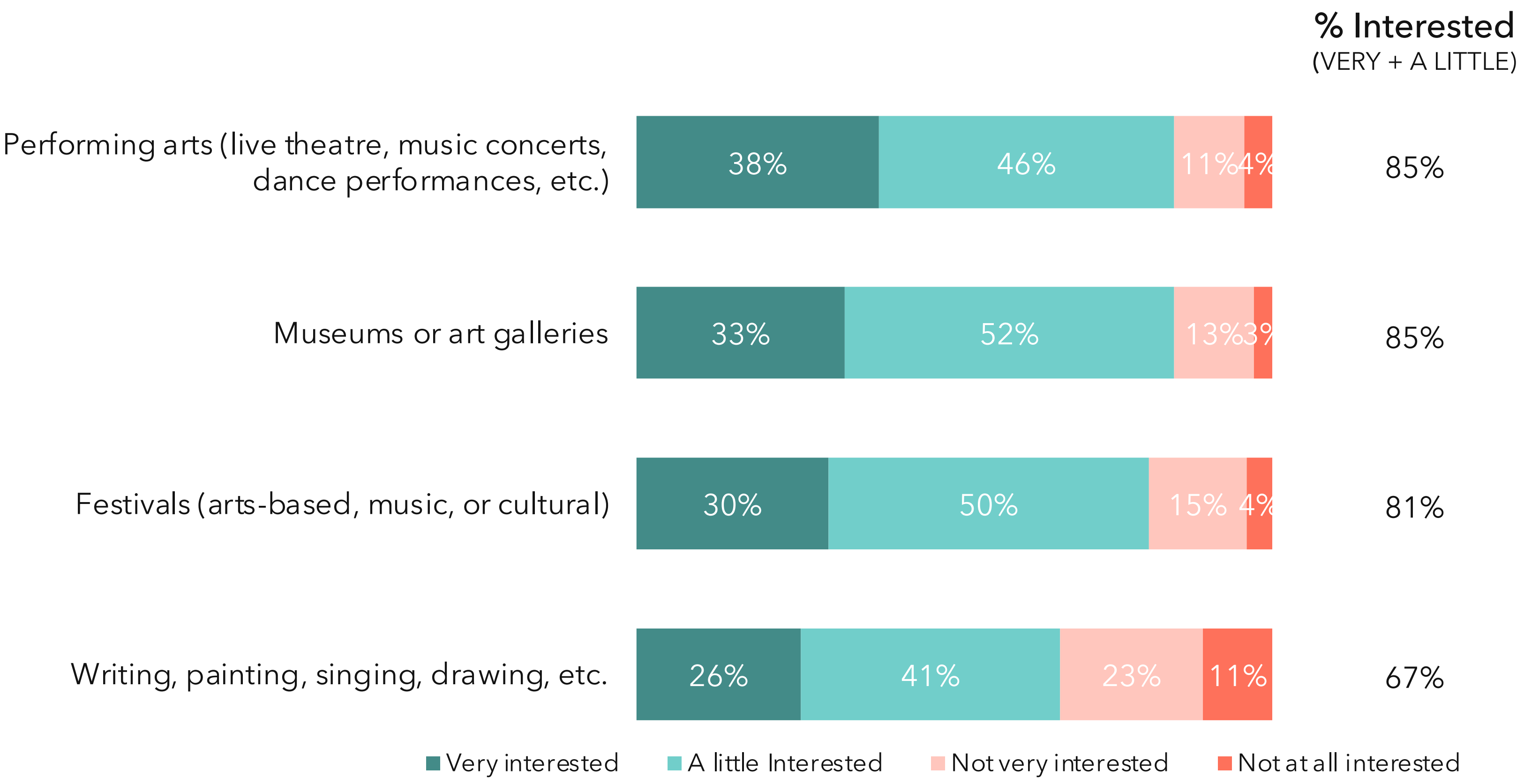
Profiling Albertans based on their engagement with the arts

There is a strong baseline of interest in the sector across the province.



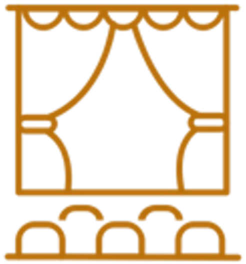
Base: All respondents (n=1,160)
Q7. Thinking about the following areas, how personally interested are you in….?

How do Albertans engage with the arts?

Engagement with arts takes many forms; some participate through active engagement and others more passively. To identify engagement levels among Albertans, we first looked at how they participate.

OBSERVE OR LISTEN

With increased media outlets and digital access, some participate with arts at a distance – on TV, online, in print, through podcasts, or even over the radio. This layer of engagement includes those who watch, listen, or read any media related activity on a regular basis.



ATTEND

Those who participate in-person and attend arts events represent the next layer of engagement. This includes those who attend or visit any art activity or event on a regular basis.

CREATE

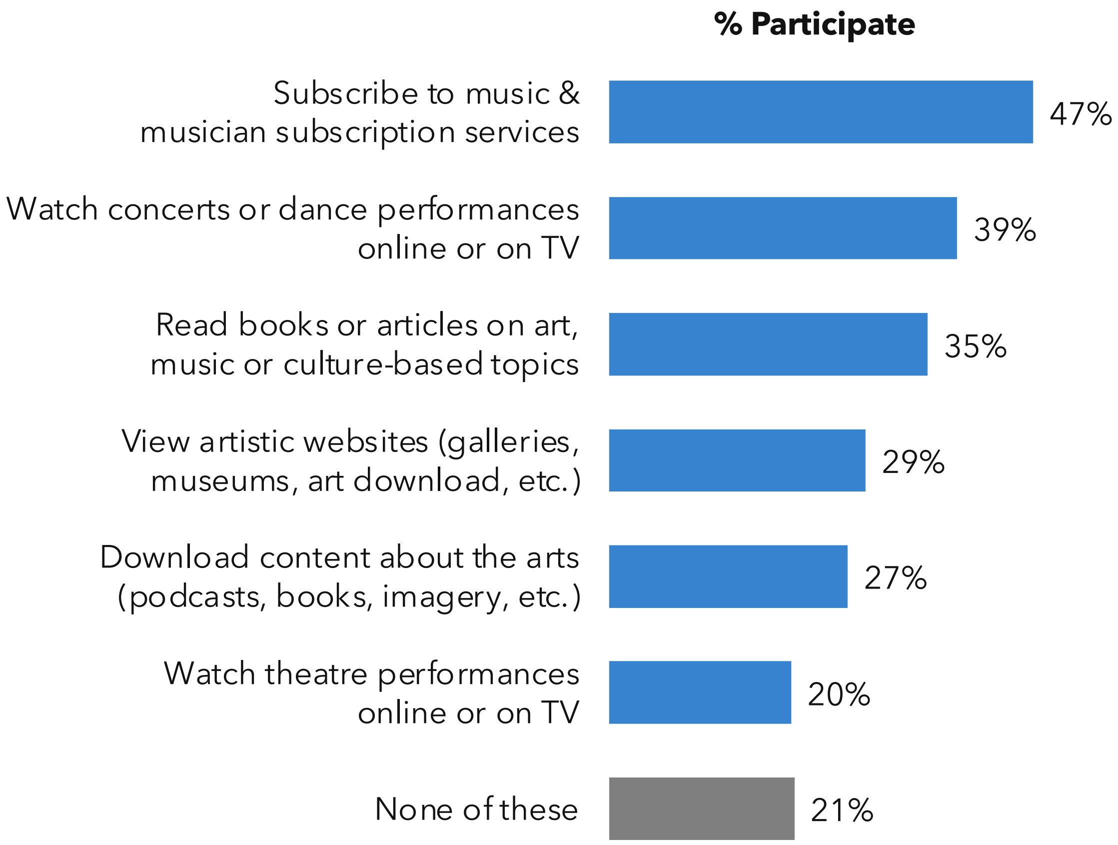
From participating in an art or music class to performing in front of an audience and from crafting to filmmaking, some spend their time doing what interests them most. This layer includes those who report creating art (in any form) in the past year.

SUPPORT

Finally, there will be some who connect with the arts by giving their time or money. This includes those who volunteer, donate or purchase subscriptions (including memberships or regular season tickets).

Engagement by Observation:

Streaming and engaging in the arts in more relaxed forms is something the immersed audience likely does by habit (by virtue of their existing connection to the arts). For passives, these activities are likely more supplemental to any in-person arts experiences they engage in.



Engagement by observation is consistent across the province. Populations that consistently engage more frequently in these types of arts activities include: women, adults under 35, and diverse populations

Base: All respondents (n=1,160)
Q10. Which of the following activities do you participate in on a regular basis? (Note: Participation by Engagement Segment provided in the appendix at the end of this report.)

Engagement by Attendance:

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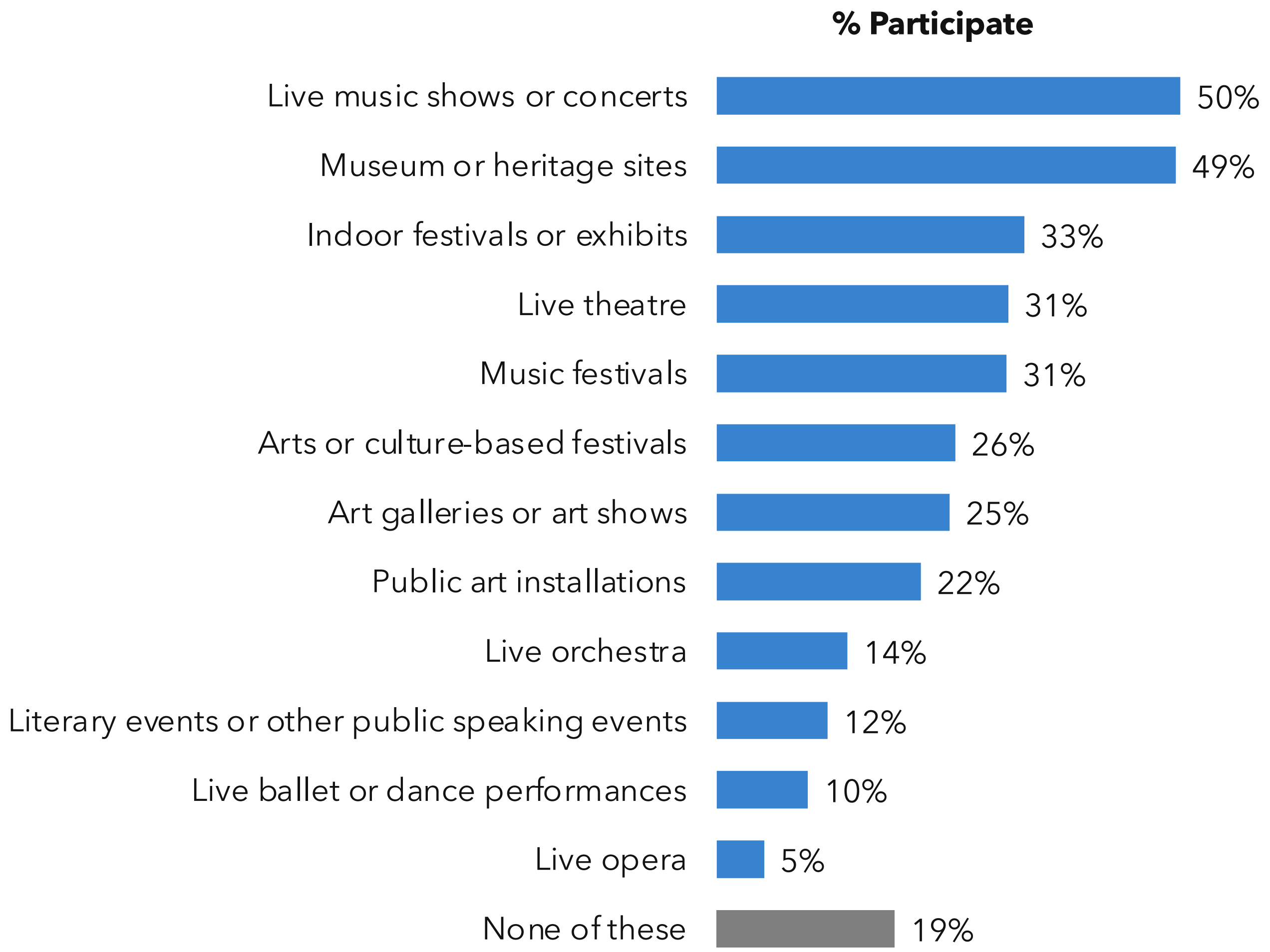
Passive audiences are more likely to take in live music or visit museums than other activities. Both the immersed and engaged groups attend arts events at a much higher rate.



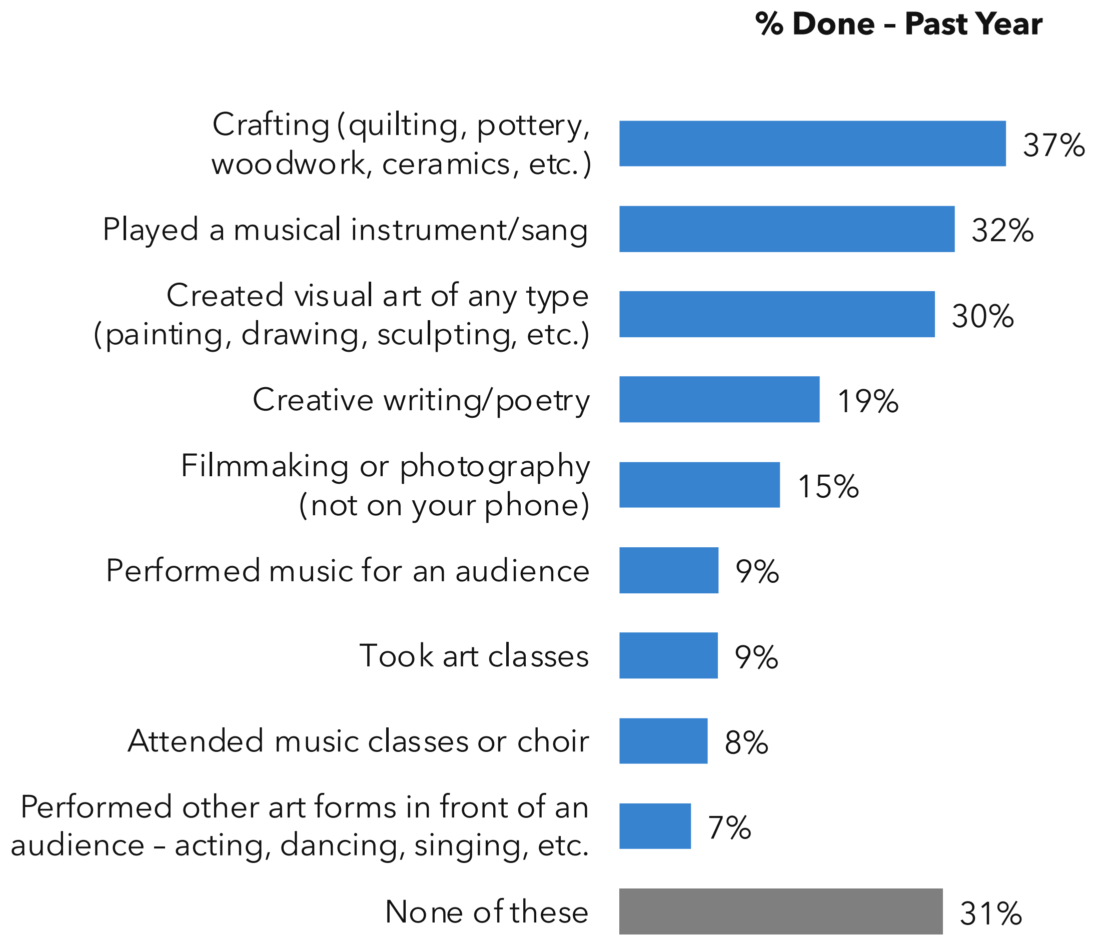
Not everyone will attend at the same rate.

- Residents of Northern Alberta tend to attend less often than those in other areas.
- Engagement via attendance tends to be more prevalent in urban areas.
- Attendance is weakest among lower income audiences and increases with income.

Base: All respondents (n=1,160)
Q9. Which of the following arts activities or events do you attend or visit on a regular basis? ?\ (Note: Participation by Engagement Segment provided in the appendix at the end of this report.)

Engagement by Creation:

Immersed and engaged audiences tend to be creators as well – a natural extension of their engagement.



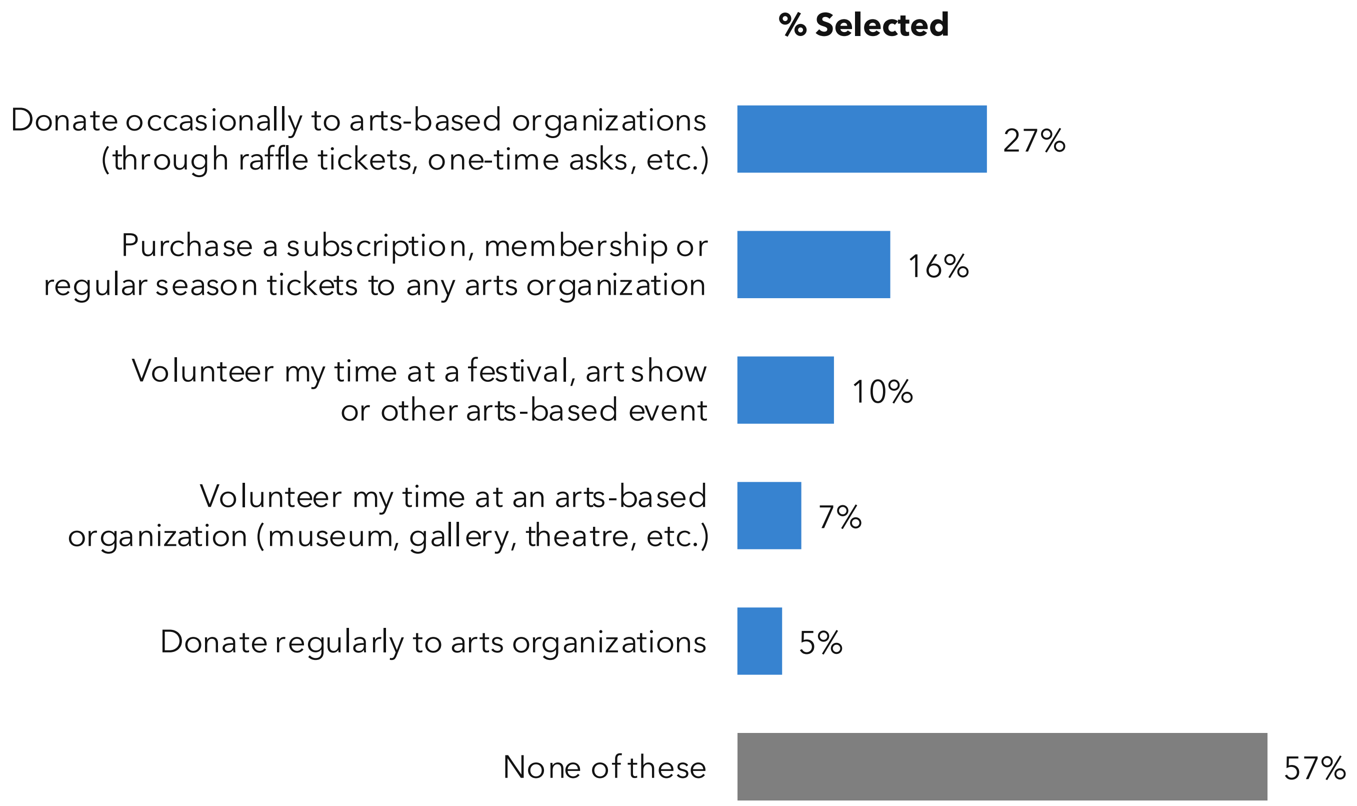
Arts creation is fairly consistent across Alberta. Among other groups:

- Women tend to create at almost twice the rate of men.
- Arts creation is strongest among adults under 35 and declines notably with age.

Base: All respondents (n=1,160)
Q11. Which of the following, if any, have done in the past year ? (Note: Participation by Engagement Segment provided in the appendix at the end of this report.)

Engagement by Support:

A full 43% of arts-engaged Albertans indicate supporting the arts through time or monetary means. However, regular donations and subscriptions have dropped off (which is supported by national research data).



Support only varies slightly:

- Calgarians are most likely to purchase a subscription.
- Support is most common in major urban settings (Calgary, Edmonton) over the rest of Alberta.
- Support appears to weaken as audiences get over the age of 55.
- Diverse populations are most likely to support the arts in these ways.

Base: All respondents (n=1,160)
Q12. And, do you do any of the following to engage with arts and culture organizations ? (Note: Participation by Engagement Segment provided in the appendix at the end of this report.)

Summarizing Engagement

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Nearly all (95%) of Albertans with an interest in arts are engaging in some way with arts and culture activities or organizations. On a regular basis, the primary form of engagement with arts and culture is through observing/listening or attending.

OBSERVE OR LISTEN

Take in arts and culture through music subscriptions services, TV, websites, books, or podcasts.

2.5 activities
on average

ATTEND

Go to concerts, museums, theatre, festivals, literary events, dance performances, or arts festivals.

3.8 activities
on average

CREATE

Play music, make art, write/create poetry, do photography, make films, take art/music classes, or perform.

2.4 activities
on average

SUPPORT

Donate, volunteer, or purchase subscription, memberships, or regular tickets.

1.5 activities
on average

Base: All respondents (n=1,160)

Creating segments based on engagement.

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Not everyone will connect with the arts in the same way. Understanding the degree to which people connect is a useful lens to understand how to reach different audiences. We identified the participation levels across the different categories (observe, attend, create, support) and now it is possible to further segment audiences based on the number of different ways they engage.

Immersed
This is a group of people who frequently engage in arts across **three or four categories** (observe, attend, create, and support)

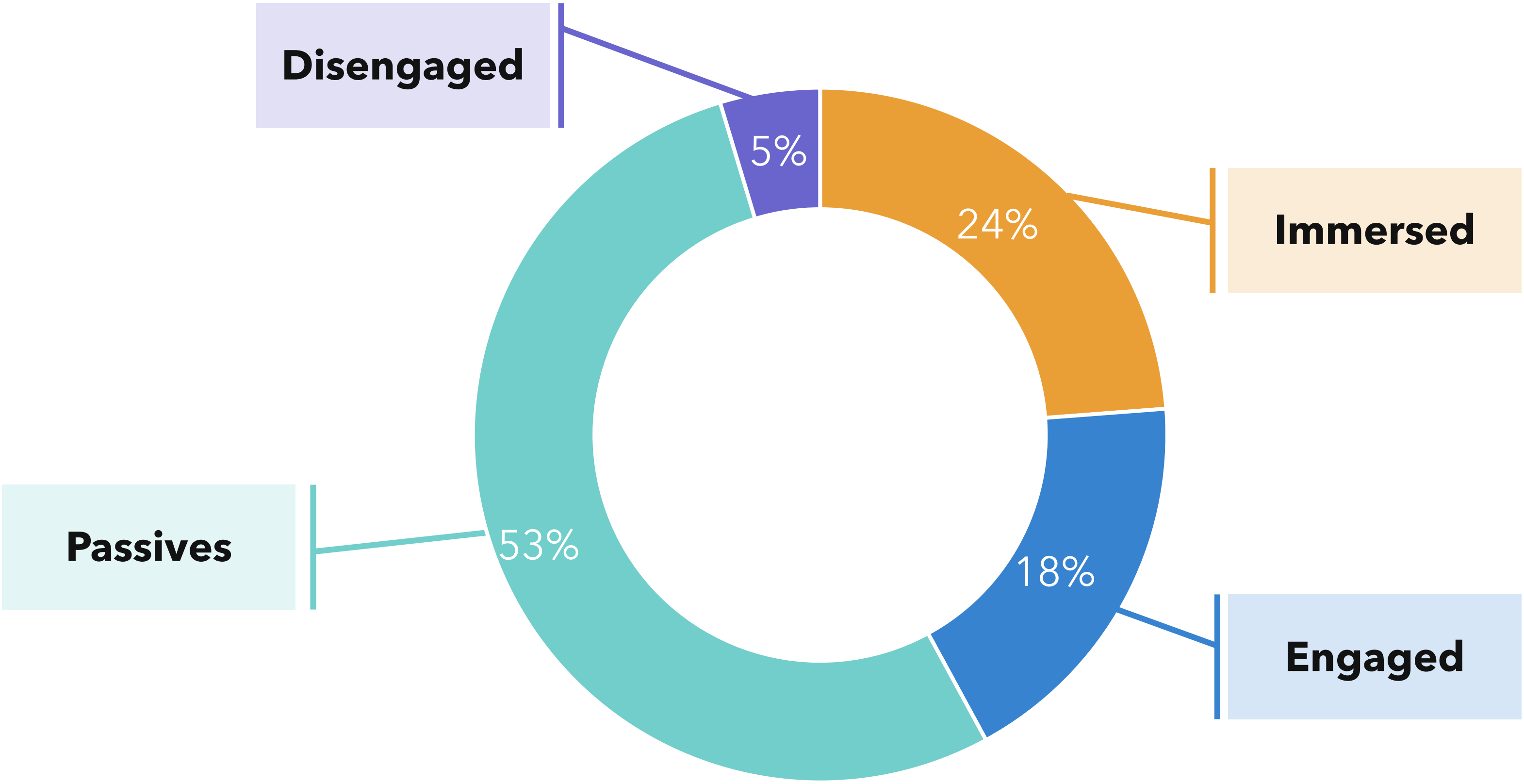
Engaged
These are audiences who engage in arts more than the average person in at **least two ways** (e.g. attend and create, observe and attend, create and support)

Passives
These are people who frequently engage in arts in only **one category** (so less engagement than the average person).

Disengaged
People who have an interest in the arts but **do not currently engage** in any way.

Across the province there is a large segment of passively engaged Albertans

Just over 4-in-10 Albertans are quite engaged with the arts and are connected in at least two ways. And while disengagement is quite low, just over half tend to be more passive in their engagement with the arts.



Base: All respondents (n=1,160)

What do these segments look like?

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Note that there are very few defining demographics differences across engagement levels, but attitudes and behaviours vary – this can help arts organizations pinpoint where they should focus their efforts with respect to programming, marketing, and communications.

	Immersed	Engaged	Passives
What do they look like?	Youngest audience Highest education level Moderate income overall	Average age distribution Higher proportion of families Moderate income and education	Skew male and slightly older. Average income and education
What do they do?	Highest participation across almost all categories (almost all observe and attend, 93% create)	Similar participation levels as the immersed but with less intensity.	Much more likely to attend or observe than create (but still occasional at best) Preferred activities are live music, museums/attractions.
Think and feel?	49% say the arts are **incredibly meaningful** Feel most **knowledgeable** about the arts and want a **transformative** experience	51% say arts are **important** but do not define them Want experiences that allow them to **escape.**	50% say the arts are something they interact with but **not personally meaningful** Feel the arts are enriching but not always entertaining. Looking for **fun** and **light-hearted.**
Key considerations	This is a group that is captivated by the arts today. You have them, and even if they stepped away during the pandemic, they are returning. Their challenge is increased attendance	Similar to the immersed group, the engaged audience already participates. But to grow their engagement, consider how to tap into multiple motivations – enriching, entertaining, social, etc.	This audience needs to be reminded entertainment value of the arts if you are going to recapture some of their time and energy. Right now they are not convinced.

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Audience Habits & Patterns

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What are arts-engaged Albertans doing today?

In terms of recreational activities, Albertans are spending their time outdoors, socializing, and dining out. These activities are generally **low-involvement** (and can be low-cost) and serve a fundamental need to fulfill core motivations.

Arts organizations do not own arts audiences. Even among arts-engaged Albertans, the top activities for recreation are all non-arts related. It is an important reminder that the competition is strong and that the arts sectors do not have a monopoly on arts audiences.

Base: All respondents (n=1,160)
Q15. In terms of recreation/discretionary activities, please select the activities you do MOST in this category (select your top 5 activities).

Immersed Albertans are doing arts activities at a higher rate (but still at lower rates than other activities)

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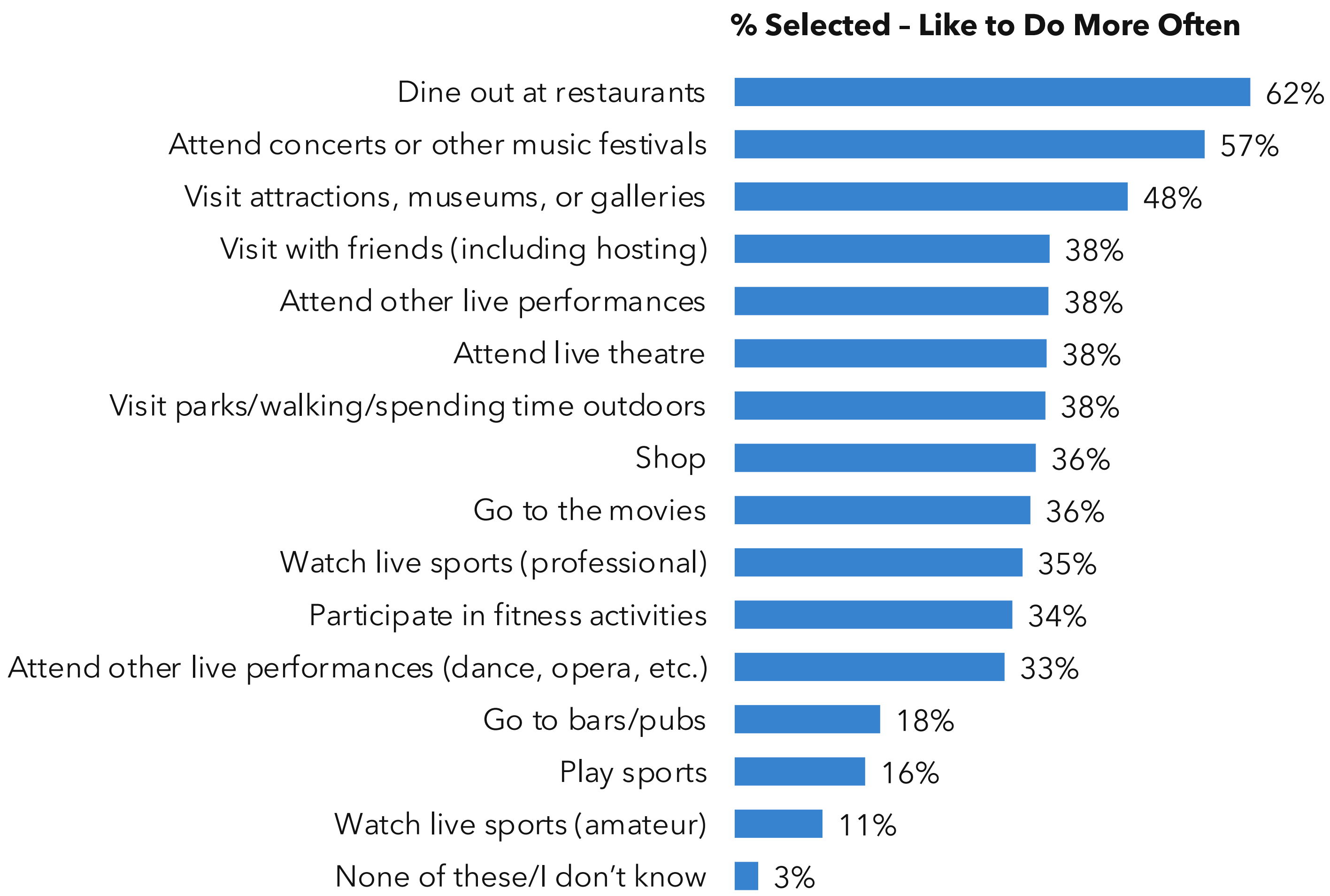
% Selected (Top 5) - Activities done MOST	**REGION**			**ENGAGEMENT WITH THE ARTS**		
	Calgary	Edmonton	Rest of AB	Immersed	Engaged	Passives
Visit parks/walking/spending time outdoors	66%	61%	57%	64%	66%	59%
Visit with friends (including hosting)	59%	61%	55%	62%	60%	57%
Dine out at restaurants	56%	55%	44% ↓	54%	53%	52%
Participate in fitness activities	37%	35%	32%	33%	40%	33%
Shop	35%	32%	31%	30%	34%	34%
Go to the movies	31% ↑	26%	21%	29%	25%	26%
Watch live sports (professional)	21%	32% ↑	19% ↓	19%	24%	27%
Attend concerts or other music festivals	**23%**	**21%**	**21%**	**35% ↑**	**25%**	**16% ↓**
Visit attractions, museums, or galleries	**22%**	**20%**	**18%**	**33% ↑**	**26%**	**14% ↓**
Go to bars/pubs	21% ↑	12%	14%	18%	17%	15%
Play sports	13%	15%	16%	11%	14%	16%
Watch live sports (amateur)	10%	12%	12%	11%	10%	12%
Attend live theatre	**10%**	**11%**	**7%**	**22% ↑**	**10%**	**4% ↓**
Attend other live performances	**8%**	**11%**	**6%**	**16% ↑**	**10%**	**5% ↓**
None of these/I prefer other activities not listed	4% ↓	5%	13% ↑	2% ↓	4%	9% ↑

Base: All respondents (n=1,160)
Q15. In terms of recreation/discretionary activities, please select the activities you do MOST in this category (select your top 5 activities).

But increasing participation in the arts is what Albertans are striving towards

It is clear that Albertans do have a desire to do more activities in the recreation and discretionary space and many of these are in the arts sector. The challenge is understanding the barriers to growing this engagement.



Base: All respondents (n=1,160)
Q16. If money or time were no object, which of the following would you like to do more often?

And this desire is even more pronounced among those who are more deeply involved in the arts (immersed segment particularly)

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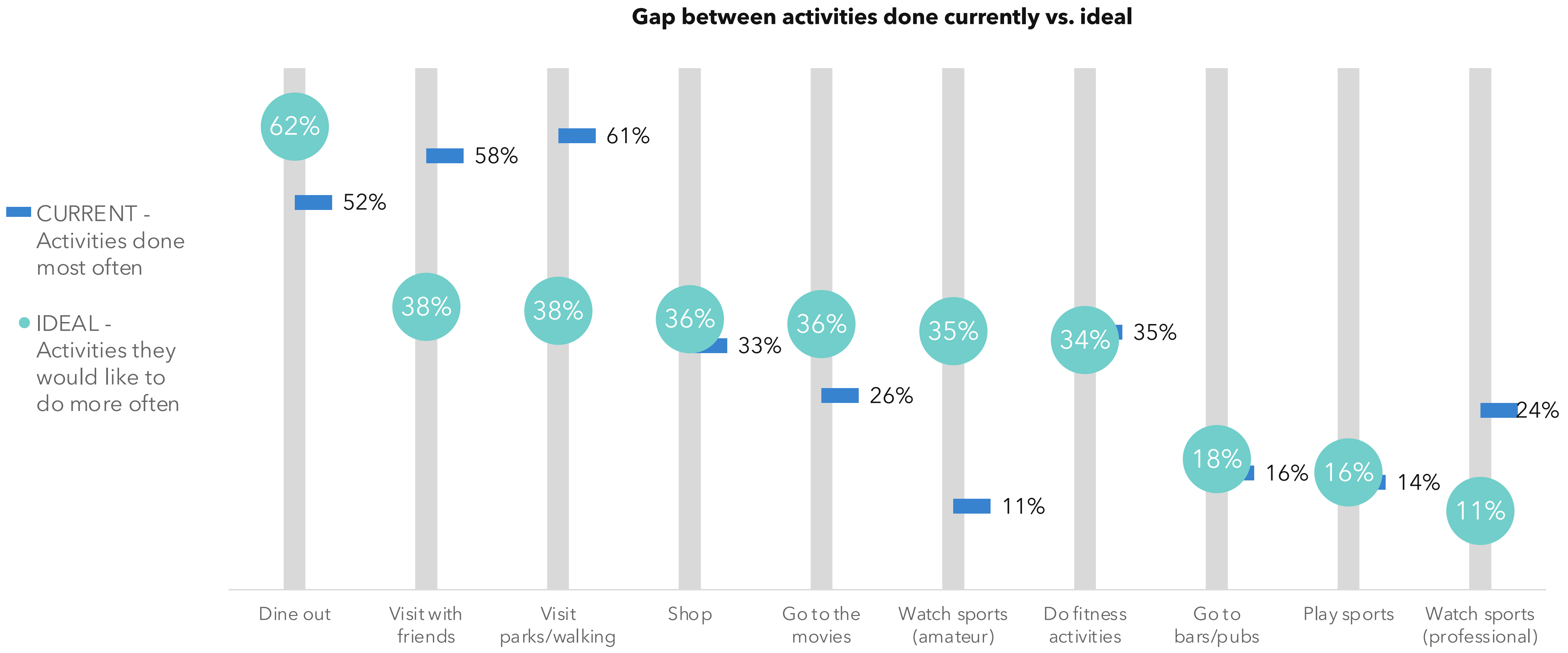
% Selected - Like to Do More Often	REGION			ENGAGEMENT WITH THE ARTS		
	Calgary	Edmonton	Rest of AB	Immersed	Engaged	Passives
Dine out at restaurants	64%	64%	59%	63%	60%	63%
Attend concerts or other music festivals	**56%**	**57%**	**58%**	**65% ↑**	**64%**	**52% ↓**
Visit attractions, museums, or galleries	**47%**	**48%**	**48%**	**62% ↑**	**55%**	**41% ↓**
Visit with friends (including hosting)	36%	40%	38%	40%	36%	38%
Attend other live performances	**38%**	**38%**	**39%**	**51% ↑**	**47% ↑**	**31% ↓**
Attend live theatre	**39%**	**38%**	**36%**	**57% ↑**	**46% ↑**	**29% ↓**
Visit parks/walking/spending time outdoors	37%	38%	39%	42%	43%	33% ↓
Shop	38%	39%	32%	36%	36%	37%
Go to the movies	36%	37%	34%	42% ↑	32%	35%
Watch live sports (professional)	30%	39%	35%	32%	35%	37%
Participate in fitness activities	36%	34%	31%	40% ↑	41% ↑	29% ↓
Attend other live performances	**33%**	**35%**	**29%**	**51% ↑**	**42% ↑**	**23% ↓**
Go to bars/pubs	22% ↑	17%	14%	18%	18%	17%
Play sports	16%	18%	14%	14%	18%	16%
Watch live sports (amateur)	8%	11%	13%	9%	10%	11%
None of these/I don't know	3%	2%	4%	1%	1%	4%

Base: All respondents (n=1,160)
Q16. If money or time were no object, which of the following would you like to do more often?

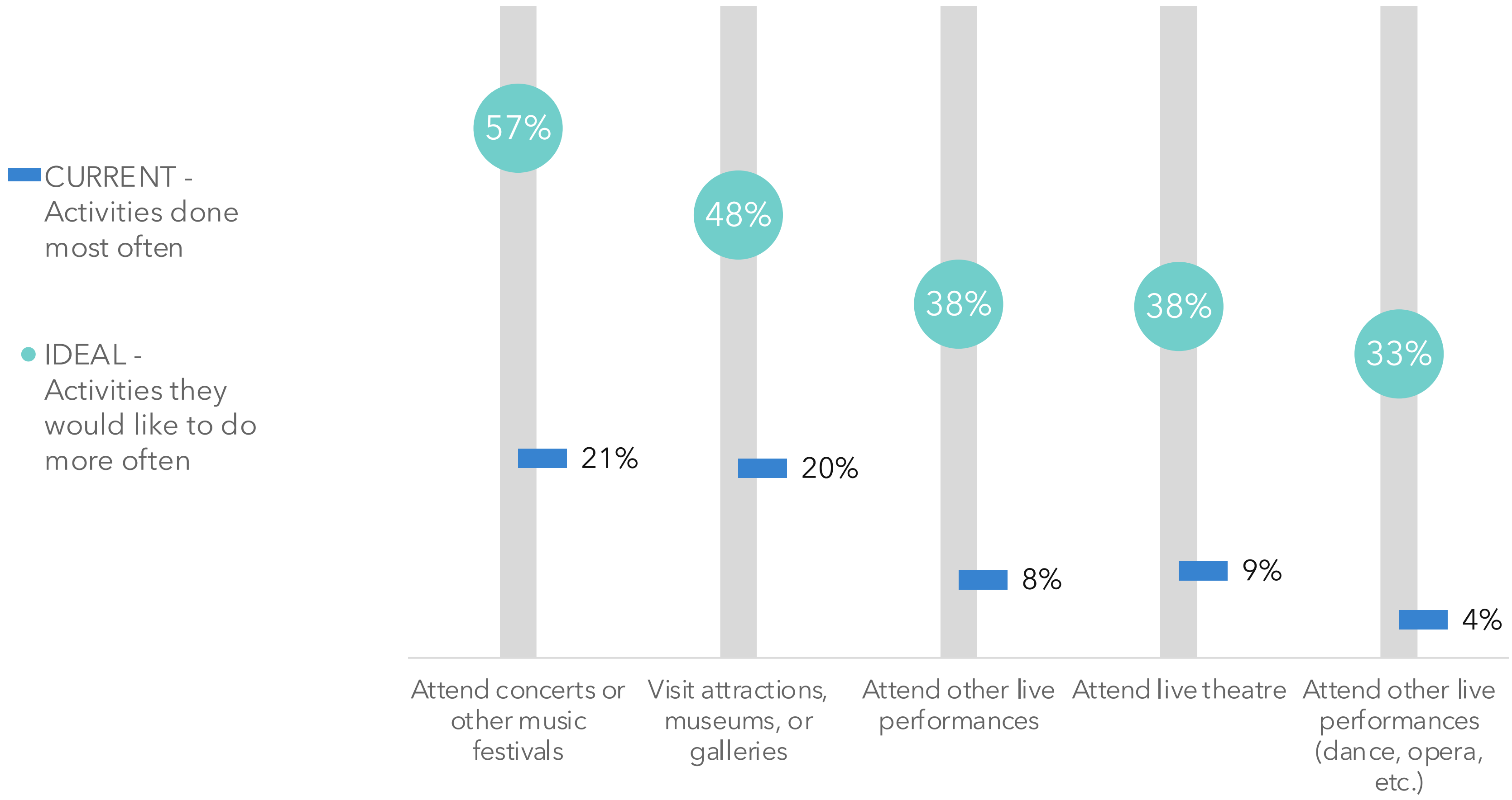
Gap Analysis: For non-arts related activities, Albertans are engaging at levels that are ideal



Base: All respondents (n= 1,160)
Q15. In terms of recreation/discretionary activities, please select the activities you do MOST in this category (select your top 5 activities).
Q16. If money or time were no object, which of the following would you like to do more often?

Gap Analysis: But the lack of discretionary time available appears to be a factor that hampers arts engagement more than other activities

Gap between activities done currently vs. ideal



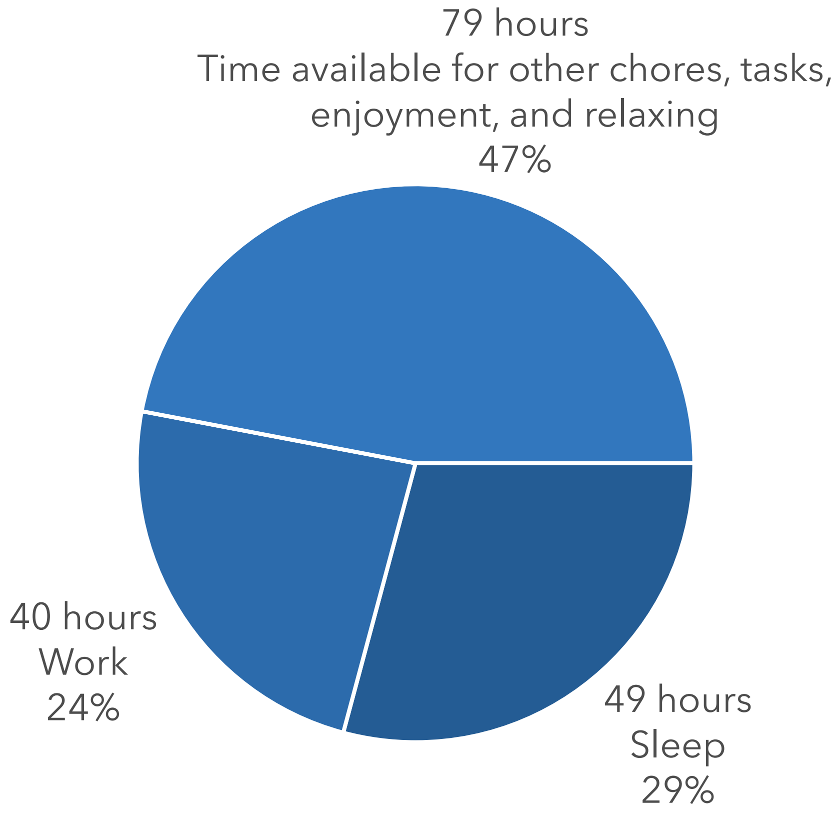
What does this mean? On an overall basis, arts-engaged Albertans indicate a desire to do more arts activities than they do currently.

Base: All respondents (n= 1,160)
Q15. In terms of recreation/discretionary activities, please select the activities you do MOST in this category (select your top 5 activities).
Q16. If money or time were no object, which of the following would you like to do more often?

Understanding Albertans' time

We asked Albertans how they spend their time aside from sleep or work/volunteering to understand what they do during the remaining time available.

In a typical week, Albertans spend their time…

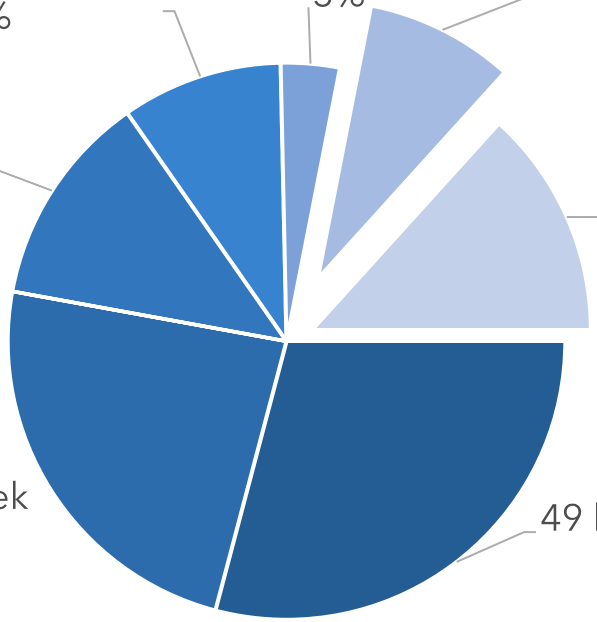


What do they do during the available hours each week…

Albertans are feeling constrained with time

Previous research already demonstrated how intertwined elements of the experience economy are. An exploration of how Albertans spend their time shows the space for recreational activities is limited and within this, there is more that Albertans want to engage in than just the arts. Carving out time for an audience that you don't own exclusively is a challenge; arts and culture is essentially competing for 15 hours per week.

In a typical week, Albertans have **79 hours** of open time, and they do…



Organizations are **competing for just 15 hours** of Albertan's time. Those with greater engagement with the arts identify more time allotted to rec and hobbies.

With the current mindset, research shows that downtime is needed. It will be a challenge to get Albertans to give up some of their downtime.

Base: All respondents (n=1,160)
Q14. During any given week, we know that people spend time at work or volunteering, and of course, sleeping. The time in between is considered discretionary time. We would like to understand how you spend your time in a typical week outside of work/volunteer and sleep. While we know that every week can be different, and this may not be exact but thinking about an average week in your household (weekdays and weekends), we'd like you to estimate what proportion of your time is spent on the following activities (please ensure the total adds up to 100%)

While many Albertans want to attend more arts events, they don't feel they have the time. Entertainment value is also a consideration.

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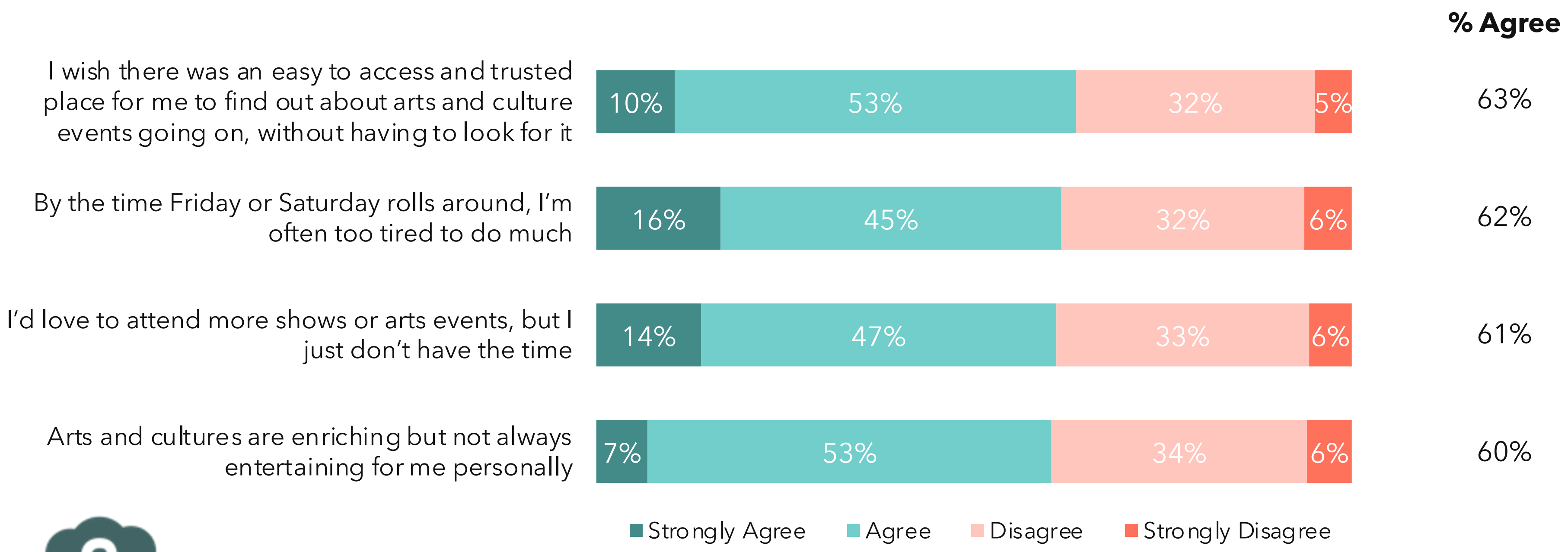

Do some Albertans think of the arts like exercise? *"I know it's good for me, but I don't always want to do it"* With 60% who agree that the arts are enriching but not always entertaining, this suggests arts-receptive Albertans still need convincing. The case hasn't been made in successful terms that the arts are valuable and enjoyable. This will be part of the hurdle for organizations to overcome.

Base: All respondents (n=1,160)
Q21. Here are some additional statements that some people might make about how they use their time. Please indicate your level of agreement with each of the following.

Attitudes are fairly consistent across the province but there are some key differences by engagement level

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% Agree (Top2box)	REGION			ENGAGEMENT WITH THE ARTS		
	Calgary	Edmonton	Rest of AB	Immersed	Engaged	Passives
I wish there was an easy to access and trusted place for me to find out about arts and culture events going on, without having to look for it	63%	68% ↑	59%	76% ↑	68%	59% ↓
By the time Friday or Saturday rolls around, I'm often too tired to do much	62%	64%	59%	56% ↓	63%	65% ↑
I'd love to attend more shows or arts events, but I just don't have the time	59%	67% ↑	56% ↓	71% ↑	71% ↑	55% ↓
Arts and cultures are enriching but not always entertaining for me personally	57%	61%	63%	41% ↓	56%	69% ↑

Immersed are much more likely to desire a trusted source for events and say they want to attend more shows (the key is making it easy for them).

For both **Engaged** and **Passives**, the entertainment value of the arts may be lacking.

Base: All respondents (n=1,160)
Q21. Here are some additional statements that some people might make about how they use their time. Please indicate your level of agreement with each of the following.

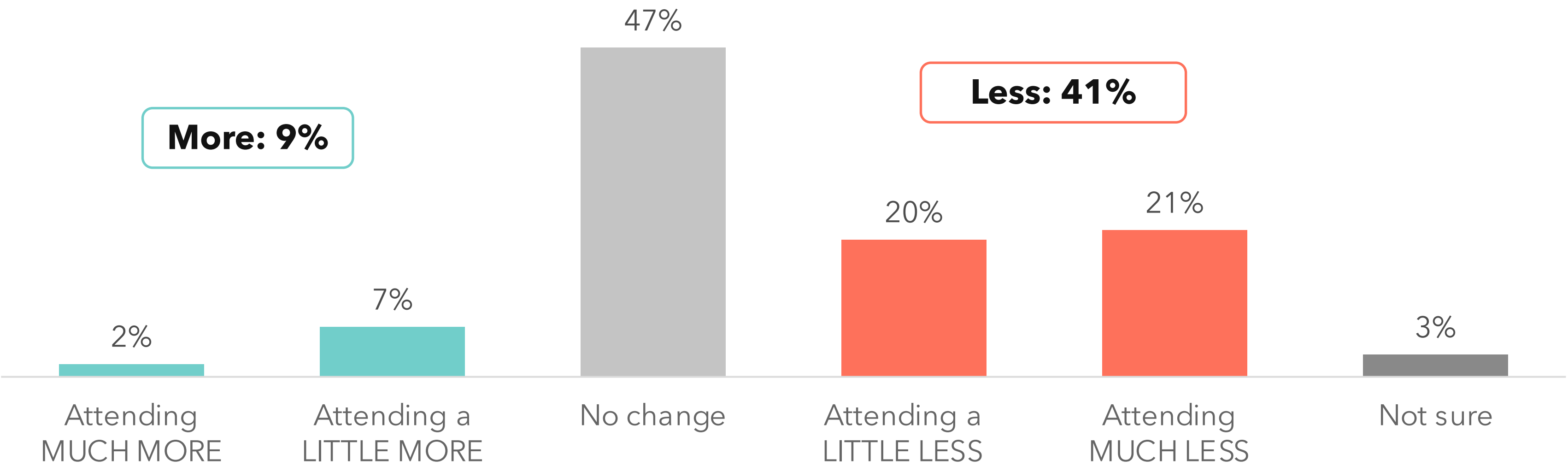
Stone — Olafson

How have behaviours and perceptions shifted post-COVID?

Attendance at arts & culture events has clearly been in decline post-COVID

The data supports what most arts organizations already know to be true – audiences are coming less often and the decline is consistent across regions of the province, demographics, and engagement levels.

Art & Culture Event Attendance – Post-COVID-19

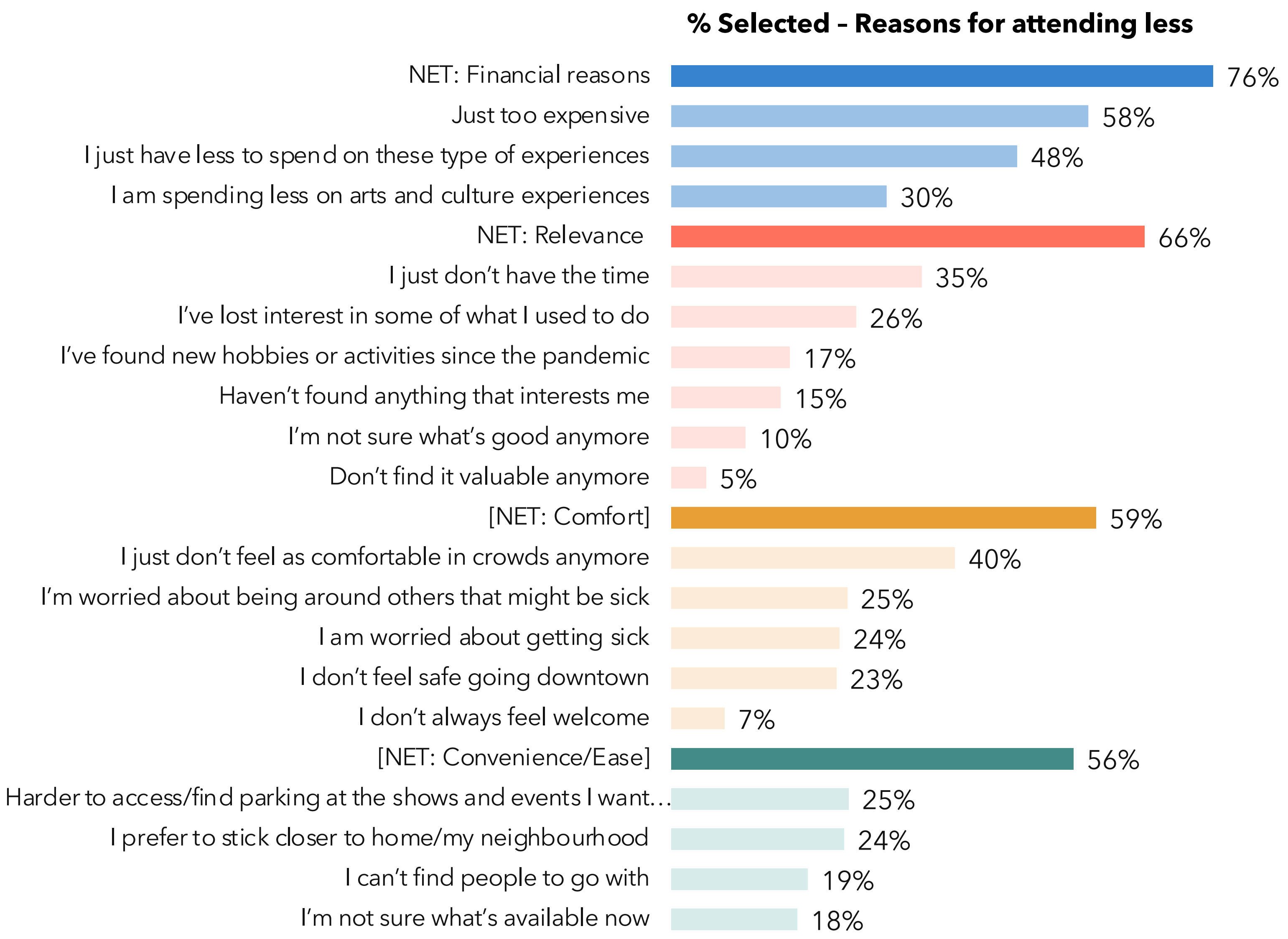


Base: All respondents (n=1,160)
Q19. Since the onset of the COVID-19 pandemic in 2020, many people have changed their habits in attending events and participating in arts and culture activities. Generally speaking, how have your habits changed?

What is stopping audiences from attending?

Cost related reasons are most prevalent but they do not tell the whole story. The lack of a relevant offer/experience stands out along with comfort and convenience related reasons.

In short, if audiences are not finding value in the experience, they may default to the easy and practical choice (even if it is the couch).



Base: Attend fewer arts events since Covid-19 (n=472)
Q22. Earlier you mentioned you attend fewer arts events than you used to. What are some of the reasons for this?

Barriers for attending shows consistency across audience types

Stone—Olafson

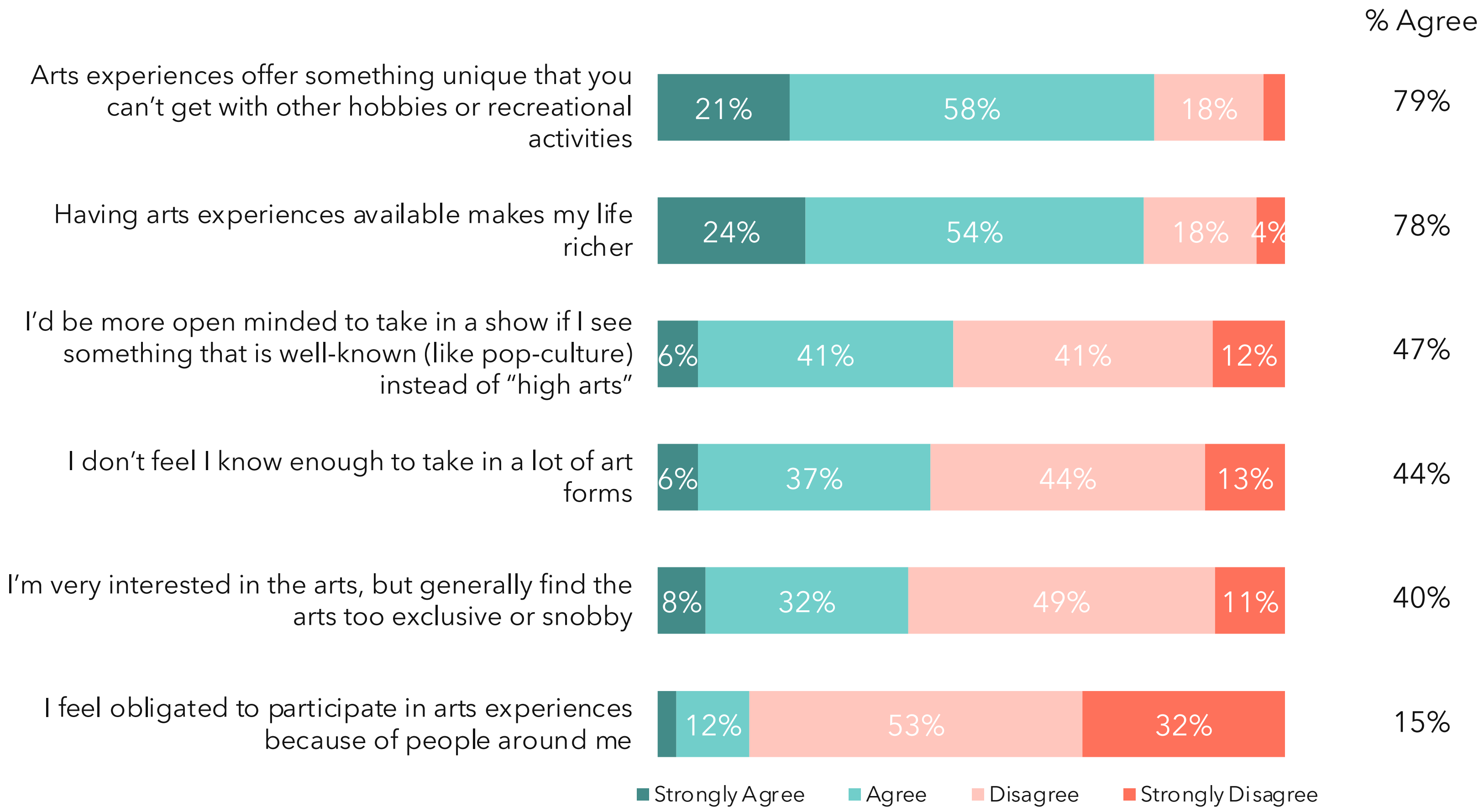
% Barriers for Attending LESS	ENGAGEMENT WITH THE ARTS		
	Immersed	Engaged	Passives
NET: Financial	**75%**	**69%**	**79%**
Just too expensive	52%	59%	62%
I just have less to spend on these type of experiences	51%	47%	48%
I am spending less on arts and culture experiences	30%	29%	30%
NET: Relevance	**62%**	**68%**	**68%**
I just don't have the time	33%	34%	37%
I've lost interest in some of what I used to do	23%	27%	27%
I've found new hobbies or activities since the pandemic	12%	22%	17%
Haven't found anything that interests me	9%	13%	20%
I'm not sure what's good anymore	8%	16%	10%
Don't find it valuable anymore	4%	4%	6%
NET: Comfort	**69%**	**59%**	**54%**
I just don't feel as comfortable in crowds anymore	45%	43%	35%
I'm worried about being around others that might be sick	34%	21%	20%
I am worried about getting sick	33%	20%	19%
I don't feel safe going downtown	24%	23%	22%
I don't always feel welcome	8%	11%	6%
NET: Convenience/Ease	**61%**	**56%**	**54%**
Harder to access/find parking at the shows and events I want to go to	27%	23%	24%
I prefer to stick closer to home/my neighbourhood	19%	28%	25%
I can't find people to go with	21%	23%	16%
I'm not sure what's available now	22%	21%	13%

Base: Attend fewer arts events since Covid-19 (n=472)
Q22. Earlier you mentioned you attend fewer arts events than you used to. What are some of the reasons for this?

And while the arts are considered unique and enriching, not all audiences are convinced

Stone—Olafson

There is a strong sense that arts experiences offer something unique and make the lives richer for audience members. But by the same token, some still find the arts too exclusive or lack knowledge that forms a perception of exclusive and snobby. This feeling of "not for me" is part of the equation that is hampering engagement.



Base: All respondents (n=1,160)
Q20. Here are some statements that some people make about the arts. Please indicate your level of agreement with each of the following.

Stone — Olafson

Passive audiences are much more likely to feel they lack knowledge in the arts (and consequently, would prefer art that is more "well-known")

% Agree (Top2box)	REGION			ENGAGEMENT WITH THE ARTS		
	Calgary	Edmonton	Rest of AB	Immersed	Engaged	Passives
Arts experiences offer something unique that you can't get with other hobbies or recreational activities	80%	80%	77%	92% ↑	90% ↑	72% ↓
Having arts experiences available makes my life richer	79%	80%	73%	97% ↑	92% ↑	68% ↓
I'd be more open minded to take in a show if I see something that is well-known (like pop-culture) instead of "high arts"	48%	51%	43%	42%	41%	52% ↑
I don't feel I know enough to take in a lot of art forms	39% ↓	50% ↑	43%	27% ↓	36% ↓	52% ↑
I'm very interested in the arts, but generally find the arts too exclusive or snobby	38%	42%	40%	31% ↓	40%	44% ↑
I feel obligated to participate in arts experiences because of people around me	15%	17%	11%	25% ↑	16%	10% ↓

When you create relevance, you create obligation and commitment. We already know immersed Albertans are more likely to participate on their own; but by nature of their deep involvement in the arts, they are also willing to participate in arts experience that they may not otherwise choose. So their exposure is greater overall (whereas those who are disengaged do not feel pressure to participate either way).

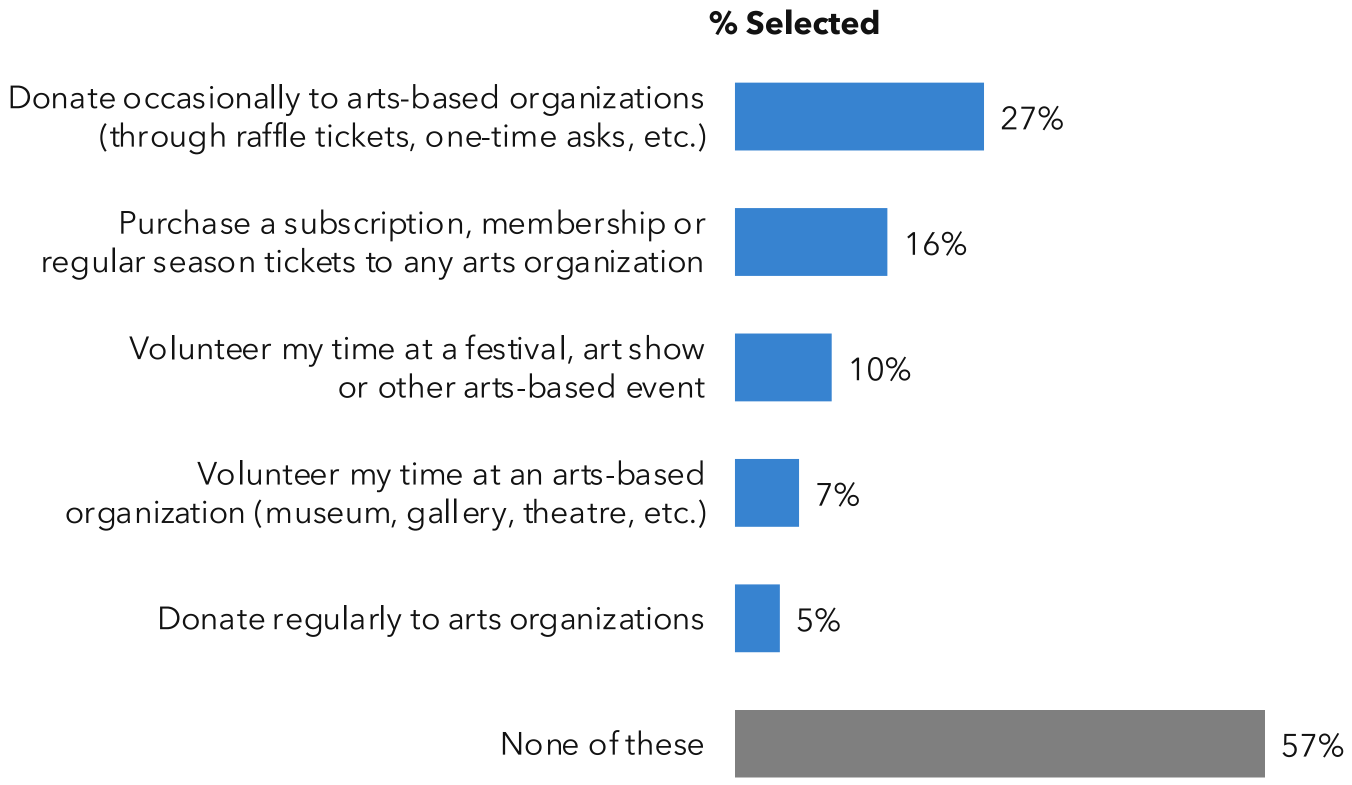
Base: All respondents (n=1,160)
Q20. Here are some statements that some people make about the arts. Please indicate your level of agreement with each of the following.

Stone— Olafson

Understanding Support

Aside from attendance, how do Albertans support arts organizations?

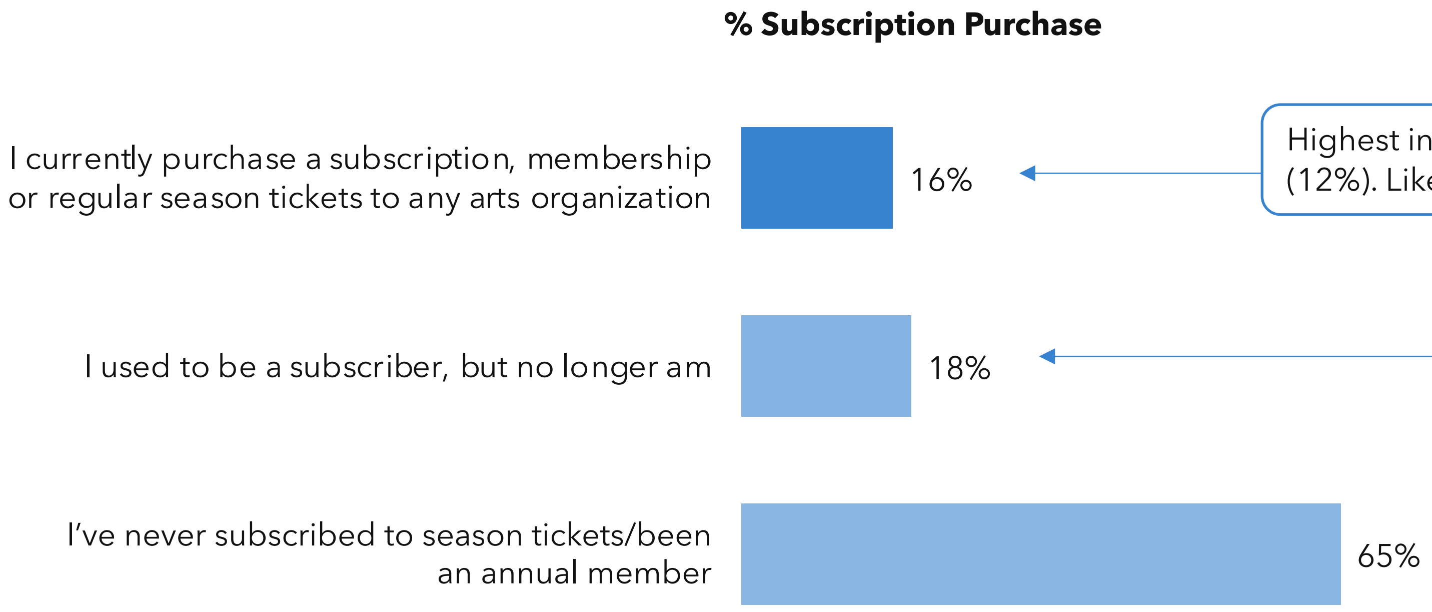
A full 43% of arts-engaged Albertans indicate supporting the arts through time or monetary means. However, regular donations and subscriptions have dropped off (which is supported by national research data).



Base: All respondents (n=1,160)
Q12. And, do you do any of the following to engage with arts and culture organizations?

Subscriptions have limited penetration among arts-engaged Albertans (and are on the decline)

16% of Albertans indicate being current subscribers or members to an arts organization. This is very valuable to organizations but – but slightly more have moved away from subscriptions altogether.



Highest in Calgary (21%), lowest in non-urban settings (12%). Likely reflects offerings by region (in part).

Age is a determinant of lost subscribers – those over 55 are most likely to have dropped their subscriptions. Interestingly, those who've dropped are still attending, they are simply buying in different ways.

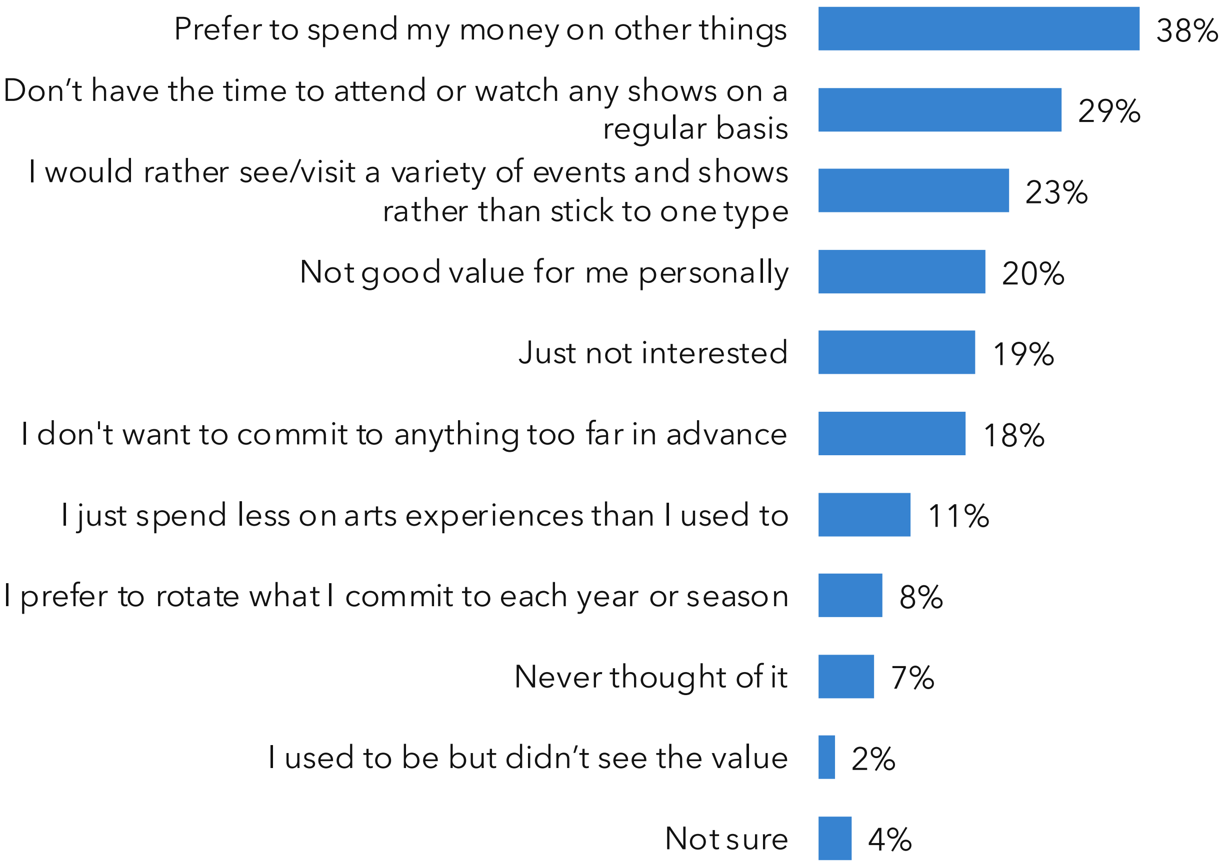
Base: All respondents (n=1,160)
Q12. And, do you do any of the following to engage with arts and culture organizations?
Q17. You mentioned earlier you are NOT a subscriber of season tickets or annual member of any arts organizations. Have you ever been a subscriber/member?

What are the barriers to the subscription model?

Stone — Olafson

Interest or time, and value (monetary concerns) are the most prevalent concerns.

% Selected – Barriers to Subscriptions



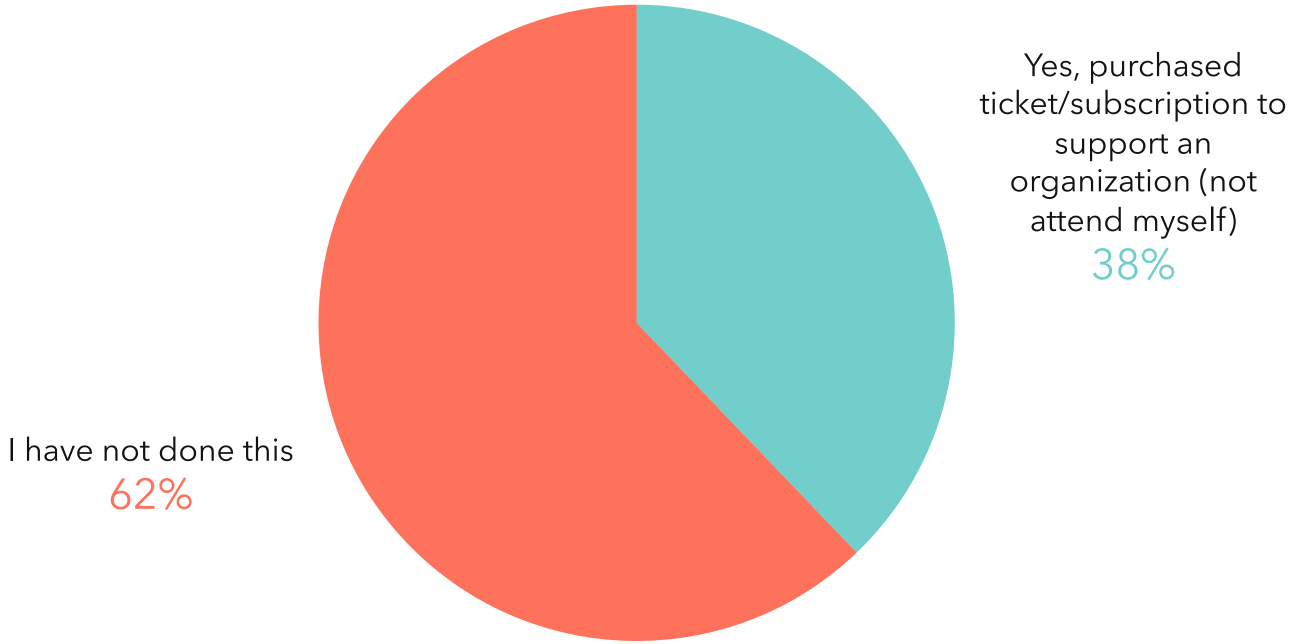
Value proposition is a real concern in an economically constrained environment, but it is NOT the only issue.
The pandemic caused audiences to explore new interests and in the face of increased competition, audiences are looking for variety and flexibility in what they participate in.

Base: Currently NOT a subscriber/member of any arts organizations (n=969)
Q18. And, why do you not subscribe to any season tickets or memberships?

But subscriptions as a means of *support* do still have value

Convincing audiences to support arts organization is a challenge in and of itself; however, there is a significant portion (38%) who have indicated purchasing a subscription primarily for support instead of attendance. In many ways, this model provides the build in flexibility that audiences crave (i.e. I don't have to go to all the shows) along with offering up a way to support the arts.

% Purchased tickets or subscriptions as support (for self or others)

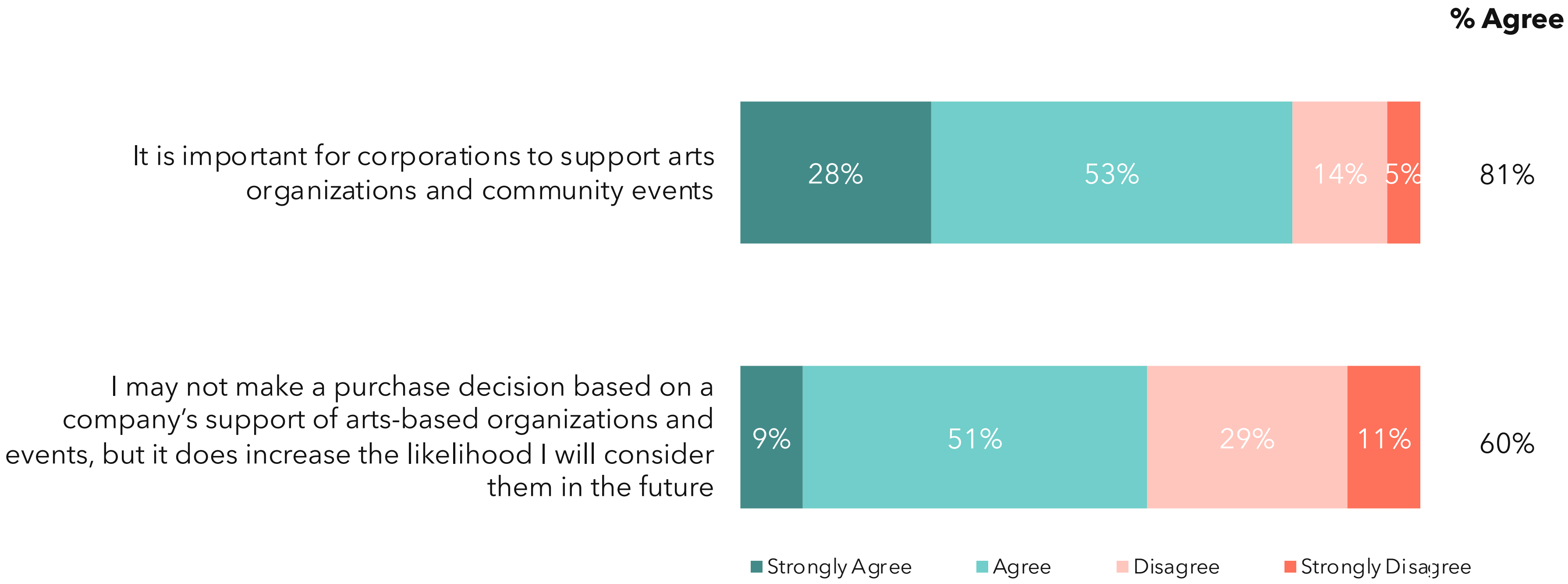


There are *no regional differences* in terms of purchasing tickets as a means of support. However, older Albertans (over 55) are more likely to support in this manner. Immersed audiences are also more likely to support.

Base: All respondents (n=1,160)
Q13. Have you ever purchased either a single ticket or a subscription, primarily to support an organization, and not necessarily to attend yourself?

And businesses have a role to play

The community has considerably strong agreement that corporations and business have a role in supporting arts organizations. While it may not be an expectation, it does lend itself well to corporate reputation and allows arts organization to fill the gaps in support.



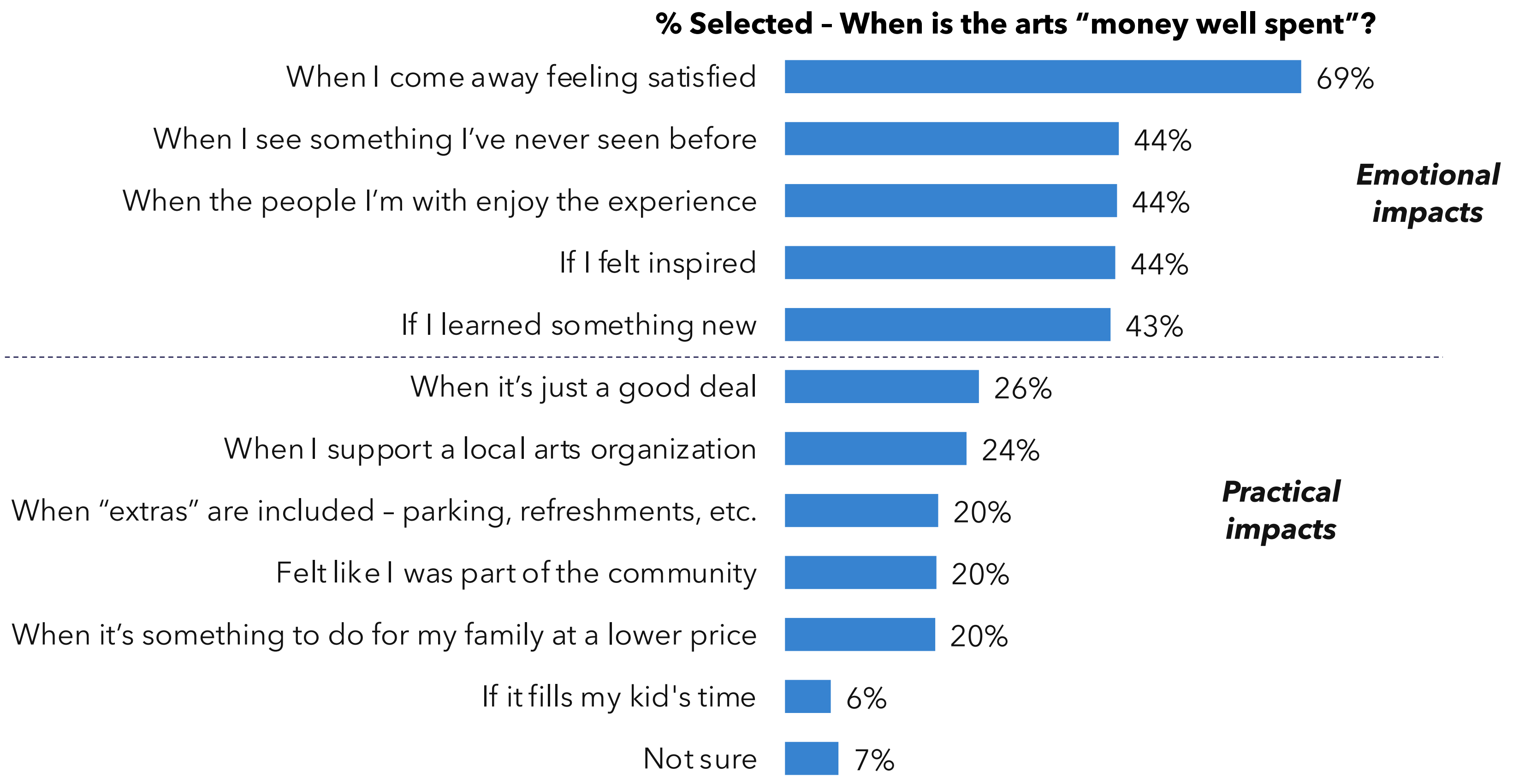
Base: All respondents (n=1,160)
Q27. Please indicate your level of agreement with the following statements on corporate or business support of arts organizations.

Stone — Olafson

(Re) defining Experiences

The arts needs to deliver emotional impact for audiences to feel it was "worth it"

What hampers this? When arts organizations focus exclusively on the performance or the art itself, audiences may lose motivation if it is an artist or type of art that is less appealing or known to them. Aligning to their internal motivations (to be social, have fun, feel something) will generate a much more powerful audience response and aid consideration.



Base: All respondents (n=1,160)
Q23. When you spend money on arts activities or events, how do you know it was worth the money spent?

Anything "remarkable" has an emotional component, but it can be light-hearted

It is clear from audience preferences that delivering on the emotional benefits is critical; but arts organizations would find it useful to be reminded that emotional does not always equate with being thought-provoking. The fun and lighthearted side of emotional is very welcome with audiences.

Base: All respondents (n=1,160)
Q24. Below are a series of words and statements that could be used to describe remarkable experiences people may have when engaging with arts and culture experiences. Thinking about your own experiences and expectations, which words or phrases best describe what makes a REMARKABLE experience for you? You can only select up to three – so please be sure to select those that are most important to you.

Attracting passive audiences will require a focus on light-hearted emotion and FUN.

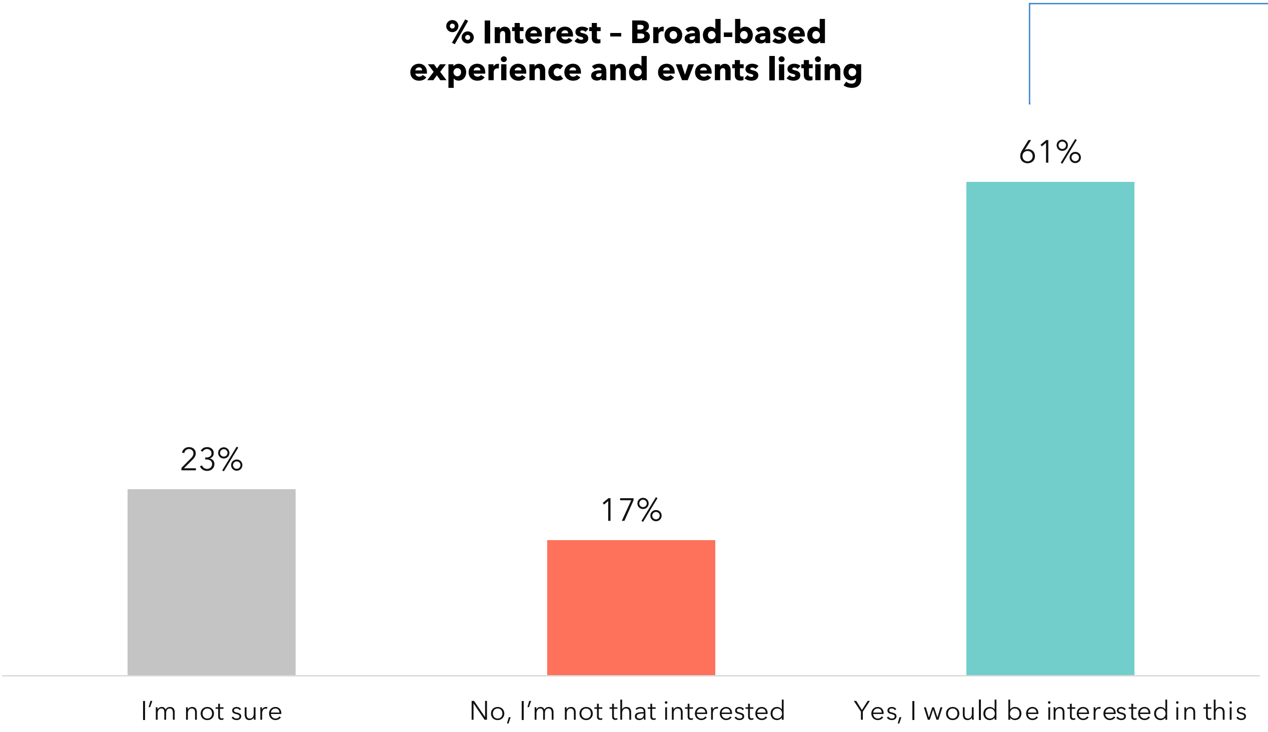
Stone—Olafson

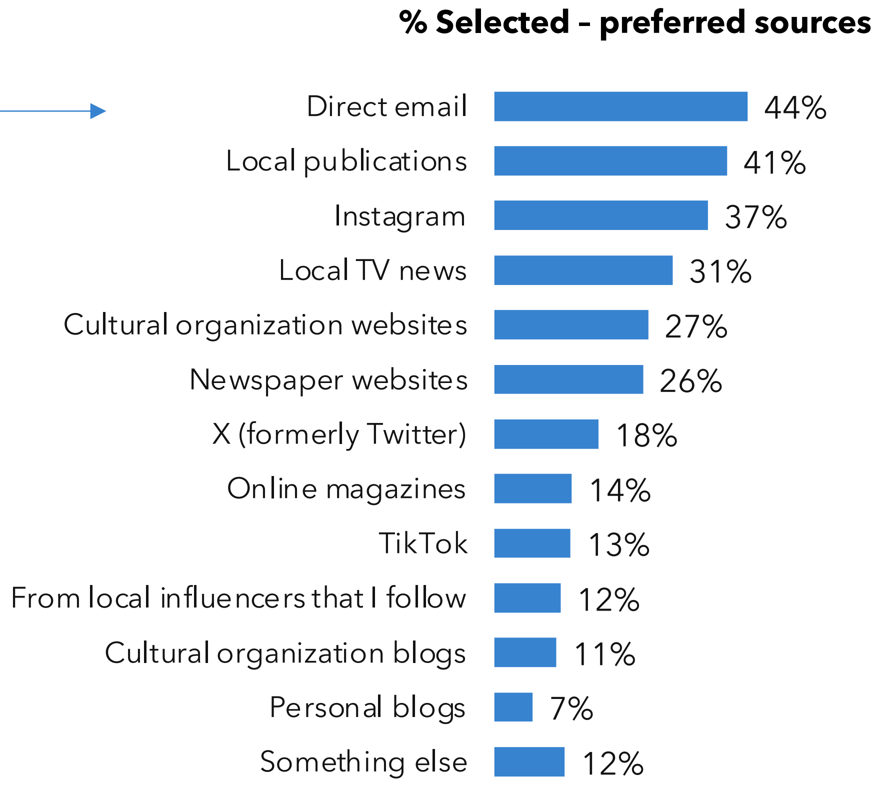
% Remarkable experiences	ENGAGEMENT WITH THE ARTS		
	Immersed	Engaged	Passives
Things that make you FEEL (happy, sad, any emotion)	49%	52%	47%
Things that are FUN	27% ↓	27% ↓	48% ↑
Content or things that make you LAUGH	25% ↓	30%	38% ↑
Activities or content that help you ESCAPE from the ordinary	30%	41% ↑	28%
Things that are UNIQUE and DIFFERENT	33%	33%	27%
TRANSFORMATIVE – making you feel a little different than before	41% ↑	36% ↑	22% ↓
Events that IMMERSE you completely in an activity	33%	30%	24%
Events that provide UNEXPECTED experiences	20%	21%	20%
FANTASTIC service from people who run the event	14%	6% ↓	14%
Events that CONNECT you to other people in the audience	12% ↑	8%	7%
Content or events that are BOLD	7%	6%	4%

Base: All respondents (n=1,160)
Q24. Below are a series of words and statements that could be used to describe remarkable experiences people may have when engaging with arts and culture experiences. Thinking about your own experiences and expectations, which words or phrases best describe what makes a REMARKABLE experience for you? You can only select up to three – so please be sure to select those that are most important to you.

Informing Audiences: moving away from curated sources

The desire for most audiences remains to use digital sources for information due to the ease and accessibility. However, many of these opt-in sources (email, newsletters, social media) tend to reinforce what audiences have already indicated an interest or preference in and do little to inform them of new or unique offerings outside their sphere.





Base: All respondents (n=1,160)
Q25. How interested would you be in a source of information that is not curated for you specifically but is instead a broad listing of any and all experiences and events that might be available to you?

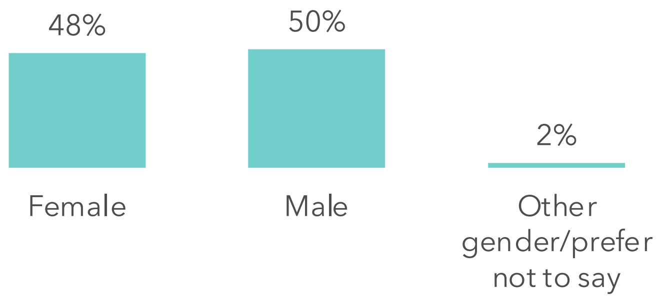
Base: Interested in non-curated sources (n=967)
Q26. Thinking about where you would most want to find out about events in your community, where would that be? Please select all that apply.

Respondent Profile

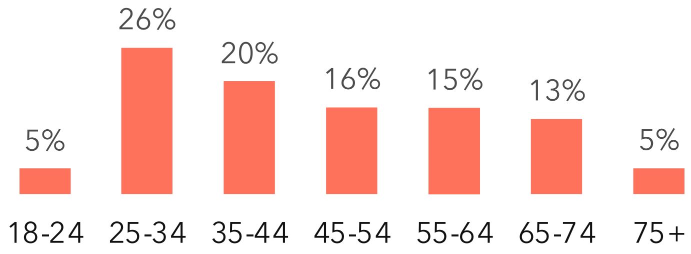
Stone — Olafson

Respondent Profile:
Who We Heard From

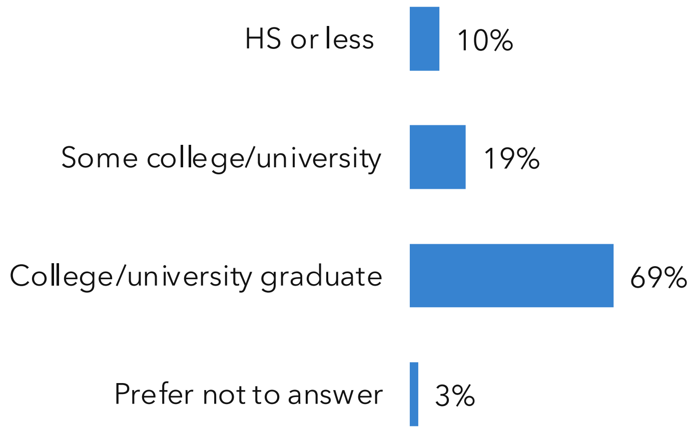
Gender



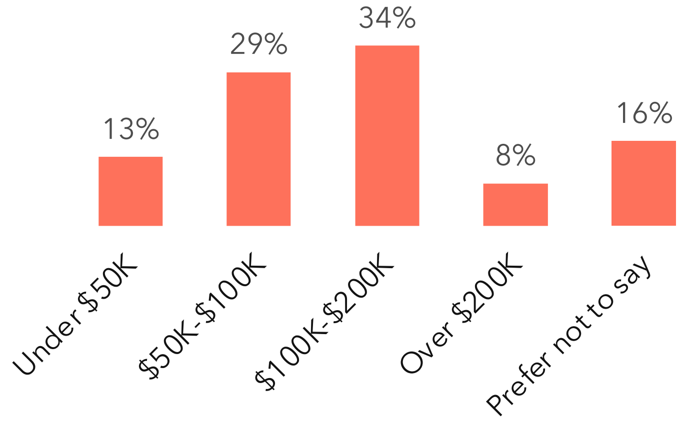
Age



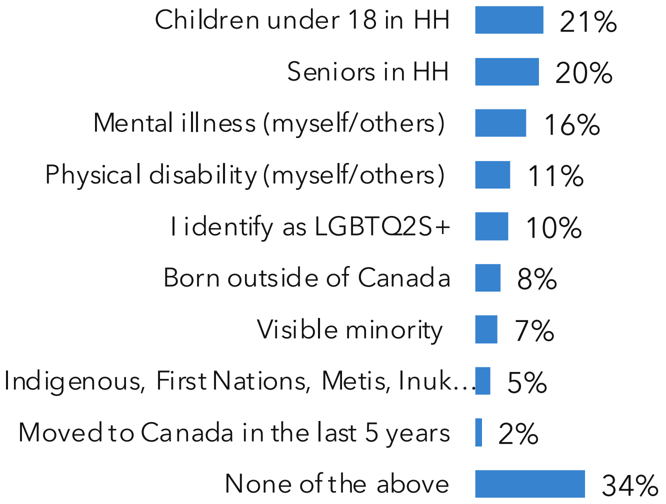
Education



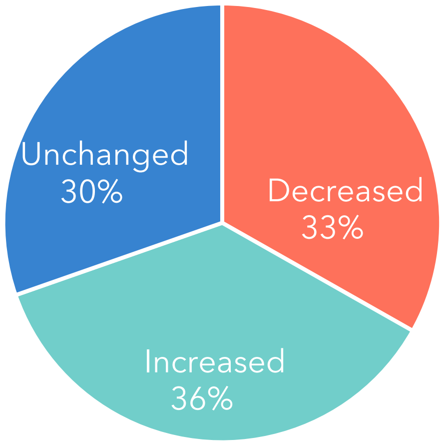
HH Income



Diversity/Identity



Income change – past 3 years



Base: All respondents (n=1,160)

Understanding people.

It's what we do.

Stone Olafson

Questions or Comments?

Please contact kim@stone-olafson.com
megan@stone-olafson.com

Stone — Olafson

Appendix: Engagement Activities by Segment

Engagement by Observation: By Engagement Segment

Stone — Olafson

Streaming and engaging in the arts in more relaxed forms is something the immersed audience likely does by habit (by virtue of their existing connection to the arts). For passives, these activities are likely more supplemental to any in-person arts experiences they engage in.

	% Participate	Immersed	Engaged	Passives
Subscribe to music & musician subscription services	47%	63%	57%	41%
Watch concerts or dance performances online or on TV	39%	64%	44%	29%
Read books or articles on art, music or culture-based topics	35%	71%	46%	19%
View artistic websites (galleries, museums, art download, etc.)	29%	61%	42%	12%
Download content about the arts (podcasts, books, imagery, etc.)	27%	61%	34%	11%
Watch theatre performances online or on TV	20%	46%	22%	10%
None of these	21%	1%	7%	27%

Base: All respondents (n=1,160)
Q10. Which of the following activities do you participate in on a regular basis?

Engagement by Attendance: By Engagement Segment

Passive audiences are more likely to take in live music or visit museums than other activities. Both the immersed and engage groups attend arts events at a much higher rate.

	% Participate	Immersed	Engaged	Passives
Live music shows or concerts	50%	70%	60%	42%
Museum or heritage sites	49%	74%	62%	38%
Indoor festivals or exhibits	33%	62%	43%	20%
Live theatre	31%	54%	45%	19%
Music festivals	31%	57%	42%	19%
Arts or culture-based festivals	26%	59%	37%	9%
Art galleries or art shows	25%	55%	38%	10%
Public art installations	22%	51%	28%	9%
Live orchestra	14%	32%	18%	6%
Literary events or other public speaking events	12%	29%	17%	4%
Live ballet or dance performances	10%	25%	13%	3%
Live opera	5%	15%	5%	1%
None of these	19%	1%	7%	24%

Base: All respondents (n=1,160)
Q9. Which of the following arts activities or events do you attend or visit on a regular basis?

Engagement by Creation: By Engagement Segment

Immersed and engaged audiences tend to be creators as well – a natural extension of their engagement.

Stone — Olafson

	% Done – Past Year	Immersed	Engaged	Passives
Crafting (quilting, pottery, woodwork, ceramics, etc.)	37%	57%	42%	29%
Played a musical instrument/sang	32%	51%	36%	25%
Created visual art of any type (painting, drawing, sculpting, etc.)	30%	57%	36%	19%
Creative writing/poetry	19%	43%	23%	9%
Filmmaking or photography (not on your phone)	15%	28%	21%	9%
Performed music for an audience	9%	20%	10%	5%
Took art classes	9%	24%	9%	4%
Attended music classes or choir	8%	21%	9%	4%
Performed other art forms in front of an audience – acting, dancing, singing, etc.	7%	16%	8%	3%
None of these	31%	7%	20%	39%

Base: All respondents (n=1,160)
Q11. Which of the following, if any, have done in the past year?

Engagement by Support: By Engagement Segment

Stone — Olafson

A full 43% of arts-engaged Albertans indicate supporting the arts through time or monetary means. However, regular donations and subscriptions have dropped off (which is supported by national research data).

	% Selected	Immersed	Engaged	Passives
Donate occasionally to arts-based organizations (through raffle tickets, one-time asks, etc.)	27%	57%	36%	13%
Purchase a subscription, membership or regular season tickets to any arts organization	16%	47%	19%	3%
Volunteer my time at a festival, art show or other arts-based event	10%	29%	12%	3%
Volunteer my time at an arts-based organization (museum, gallery, theatre, etc.)	7%	20%	7%	2%
Donate regularly to arts organizations	5%	15%	4%	1%
None of these	57%	8%	40%	80%

Base: All respondents (n=1,160)
Q12. And, do you do any of the following to engage with arts and culture organizations?