Stone — Olafson

Spotlight on Arts Audiences

Wave 1 Results: Calgary
Winter 2023-2024

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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 leadership.

A collaborative and evolving resource:

Purpose & Objectives:

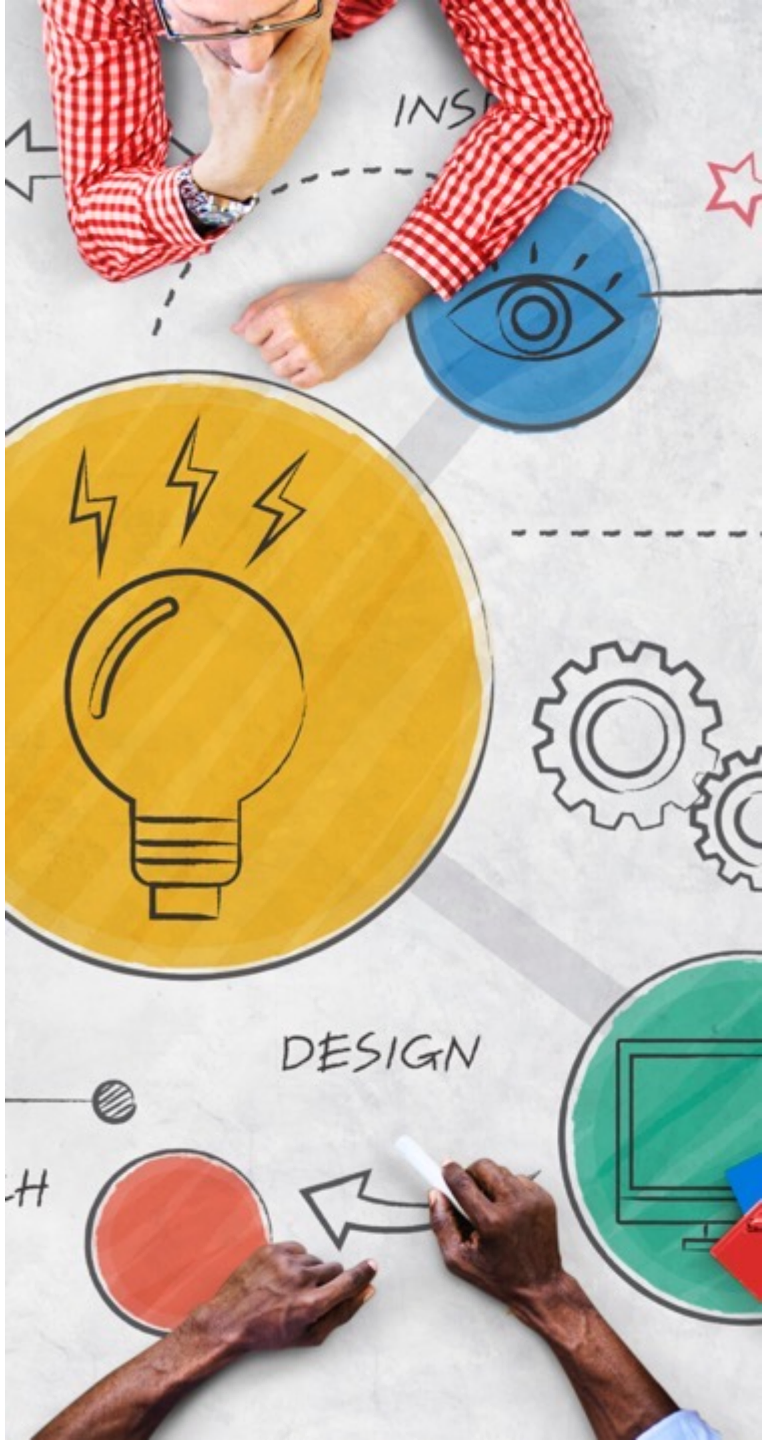
Alberta continues to be at a crossroads brought by a pandemic that has changed public life and re-shaped our economy. This is especially true in the arts sector which continues to experience a decline in engagement with events and activities. This work was developed for this sector exclusively. It builds 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 6th -16th, 2023.

An approximate margin error for a typical sample size of n=1,160 is +/- 2.9%. An approximate margin of error for a typical sample size of n=400 is +/- 4.9% (although margin of errors are not typically applicable for online non-probability samples. This is directional guidance only).

This report focuses on the Calgary region only. Results are shown alongside total results to provide a directional comparison to other areas of the province.

Key Findings and Implications

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What is different in Calgary?

Similar engagement levels but slightly higher commitment

While general engagement levels in Calgary are very similar to the rest of the province, there is a slightly greater number of subscribers/members to arts organizations can be found in Calgary (21%) compared to the rest of the province (16%). *Please note this is still a modest difference.*

In addition, Calgarians indicate slightly higher level of perceived knowledge of the arts.

Competition is prevalent

On average, Albertans indicate they have 15 hours per week for recreation activities; Calgarians indicate they have 16 hours per week.

Arts organizations in Calgary are still competing with a variety of activities and experiences to fill their recreational time. As with the rest of the province, it will remain critical for organizations to focus on removing barriers to participation – value, relevance, and convenience.

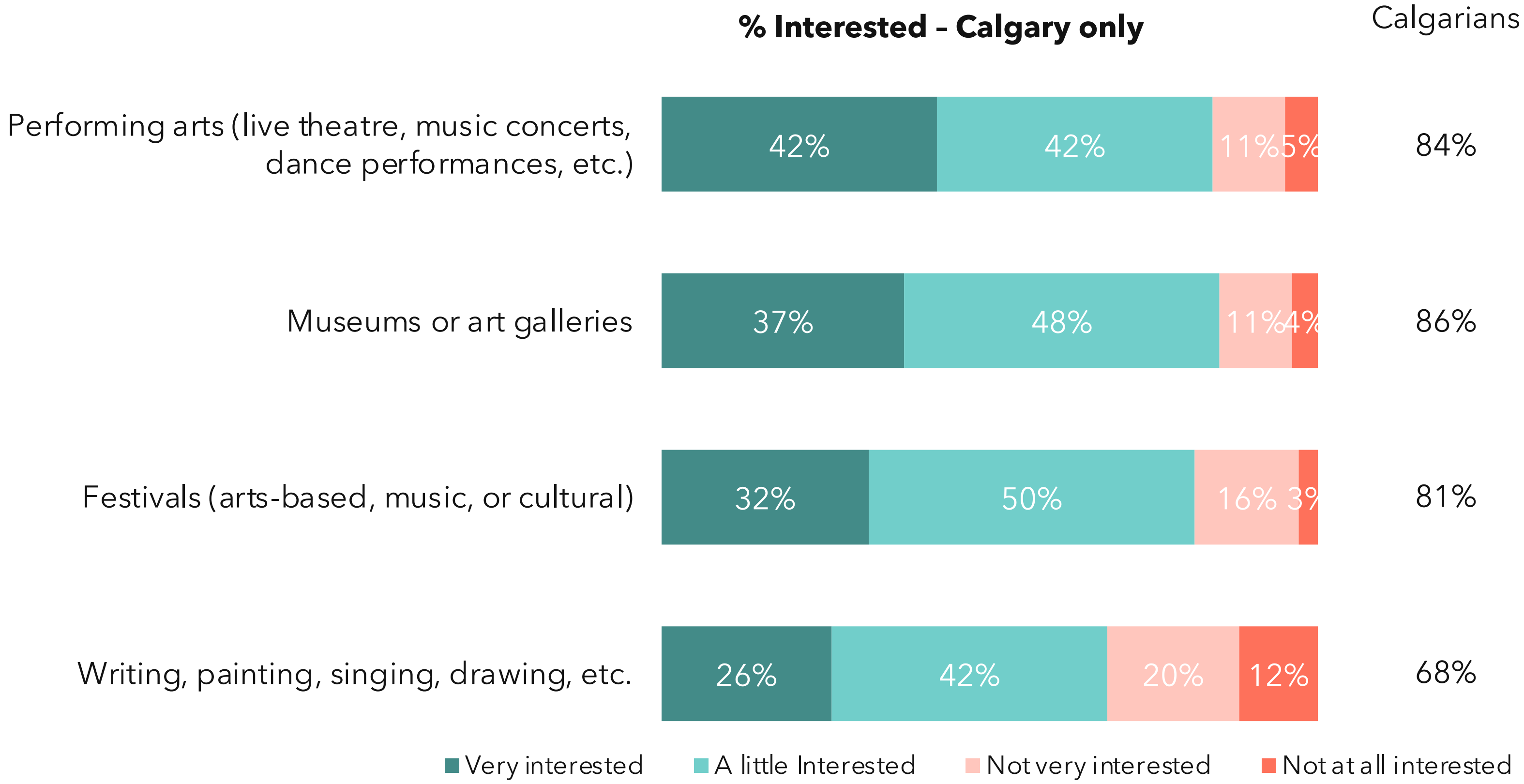
Remarkable has a different meaning

The top descriptors for a remarkable experience for Calgarians is one that makes them "feel" and is "fun".

There is an added interest for experiences that are transformative to make them feel differently than before and be able to immerse themselves into the activity. These are important for arts organizations to consider as they create their programming and communication strategies.

Profiling Calgarians based on their engagement with the arts

Calgarians reflect the rest of the province with their interest level in the arts



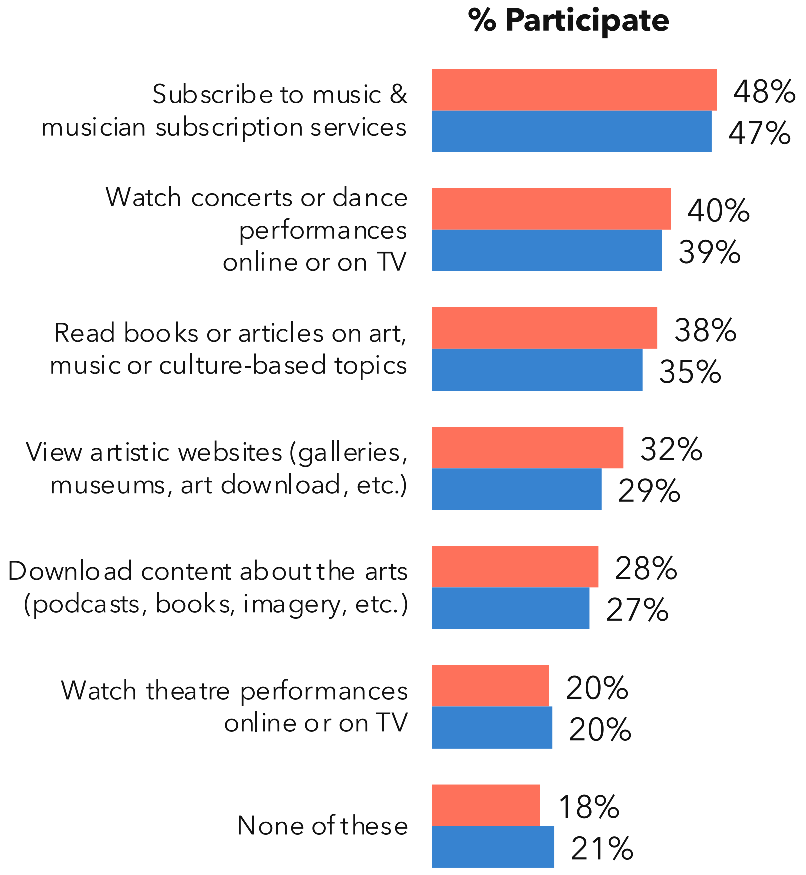
% Interested (VERY + A LITTLE)

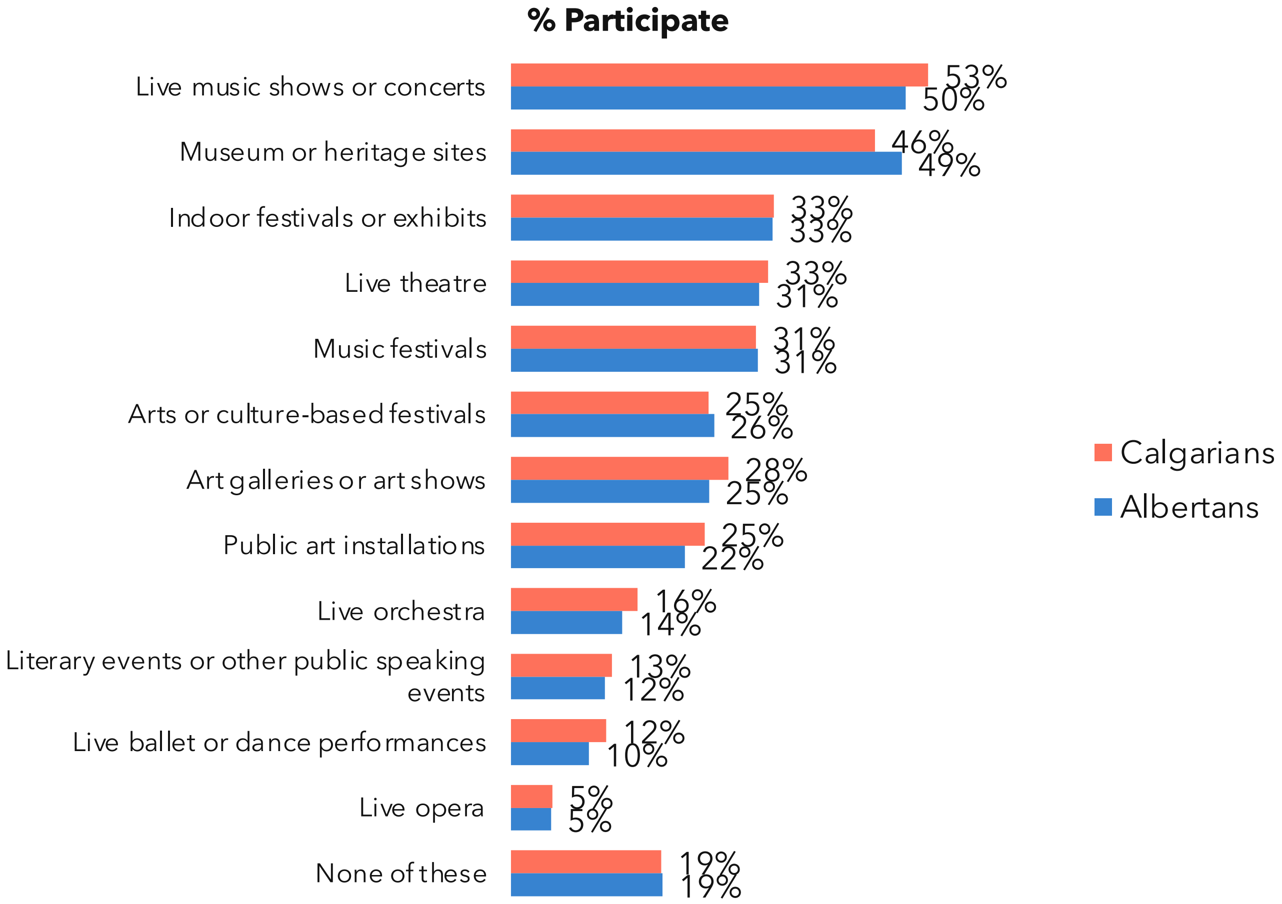
Calgarians	Albertans
84%	85%
86%	85%
81%	81%
68%	67%

Base: Calgarians (n=400)
Q7. Thinking about the following areas, how personally interested are you in....?

Calgary Engagement (Observation and Attendance)

Calgarians observe and attend the arts at very similar levels to the rest of the province.



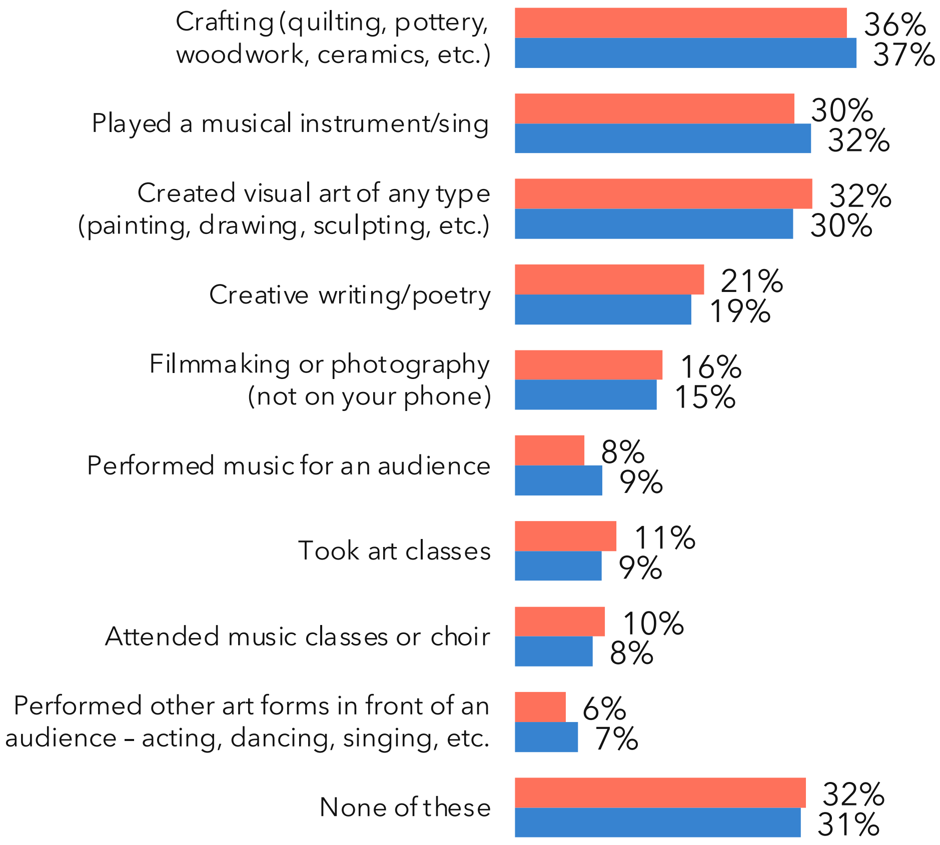


Base: Calgarians (n=400); Albertans (n=1,160)
Q10. Which of the following activities do you participate in on a regular basis? Q9. Which of the following arts activities or events do you attend or visit on a regular basis?

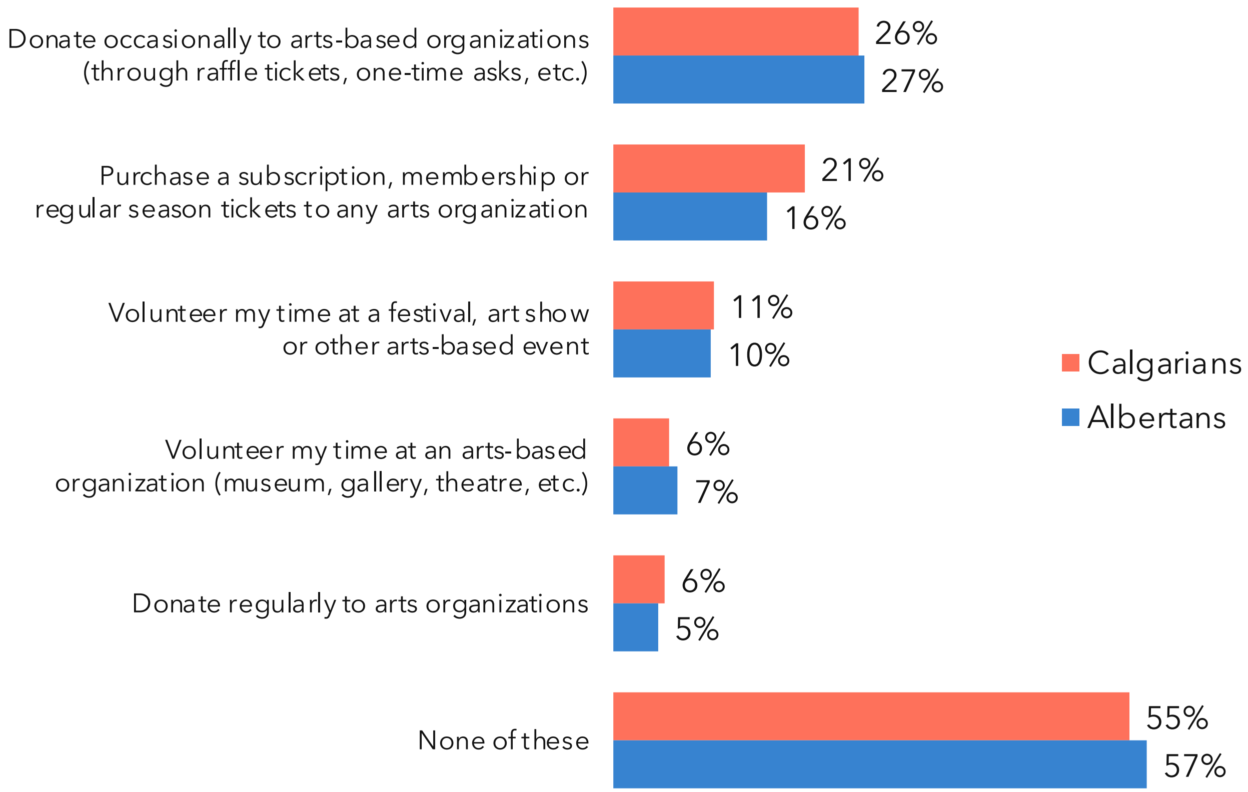
Calgary Engagement (Creation and Support)

The same is true with respect to creation and support levels – little difference compared to the rest of the province.

% Done – Past Year (Create)



% Selected (Support)



Base: Calgarians (n=400); Albertans (n=1,160)
Q11. Which of the following, if any, have done in the past year ? Q12. And, do you do any of the following to engage with arts and culture organizations ?

Summarizing engagement in Calgary

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Nearly all (95%) of Calgarians 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.

2.2 activities
on average

ATTEND

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

3.4 activities
on average

CREATE

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

2.0 activities
on average

SUPPORT

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

1.5 activities
on average

Base: Calgarians (n=400)

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 (and Calgarians)

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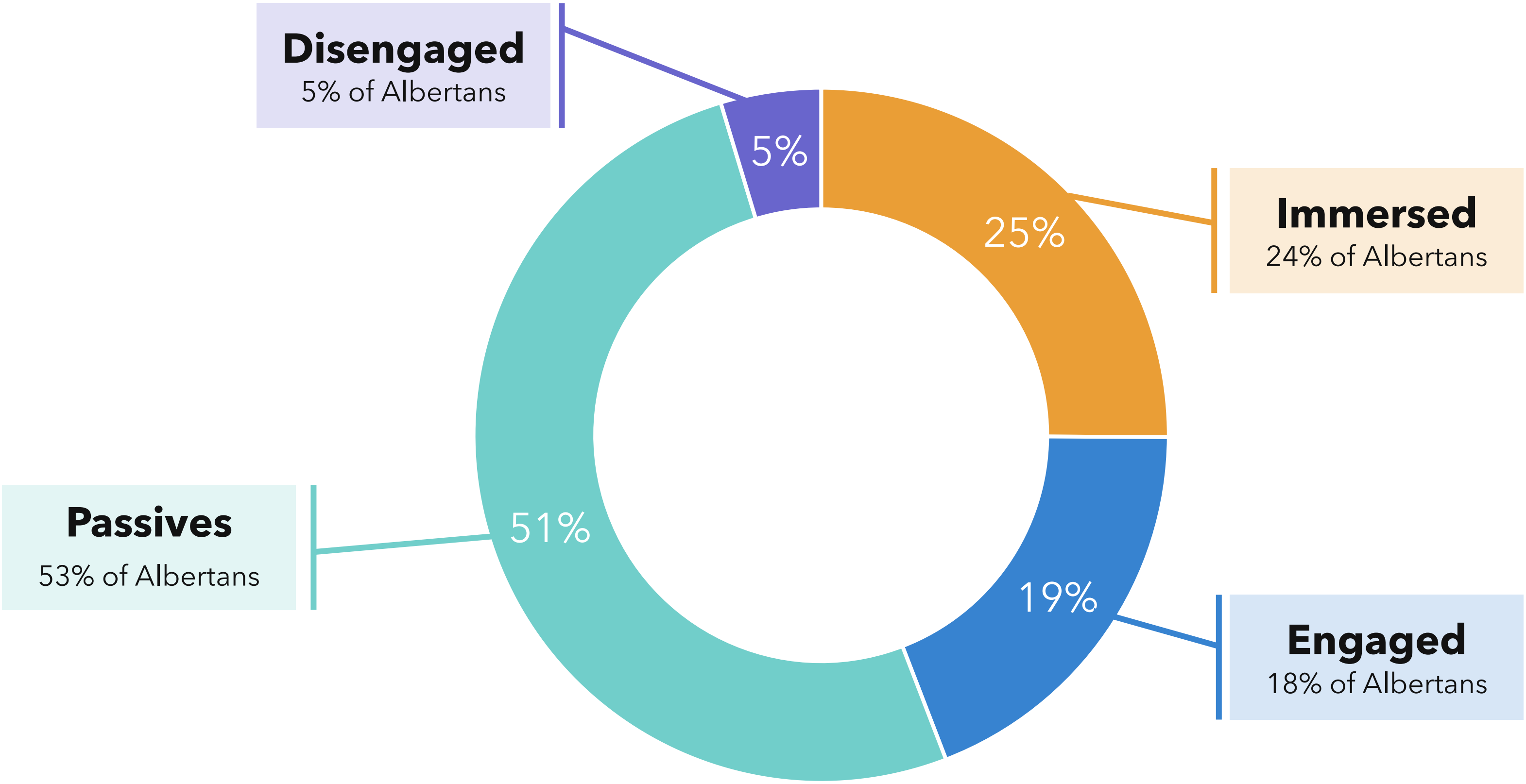
Just over 4-in-10 Albertans are quite engaged with the arts and are connected in at least two ways. And while disengagement is quite low, just over half tend to be more passive in their engagement with the arts. The same breakdown is reflected in the Calgary market.



Base: All respondents (n=1,160)

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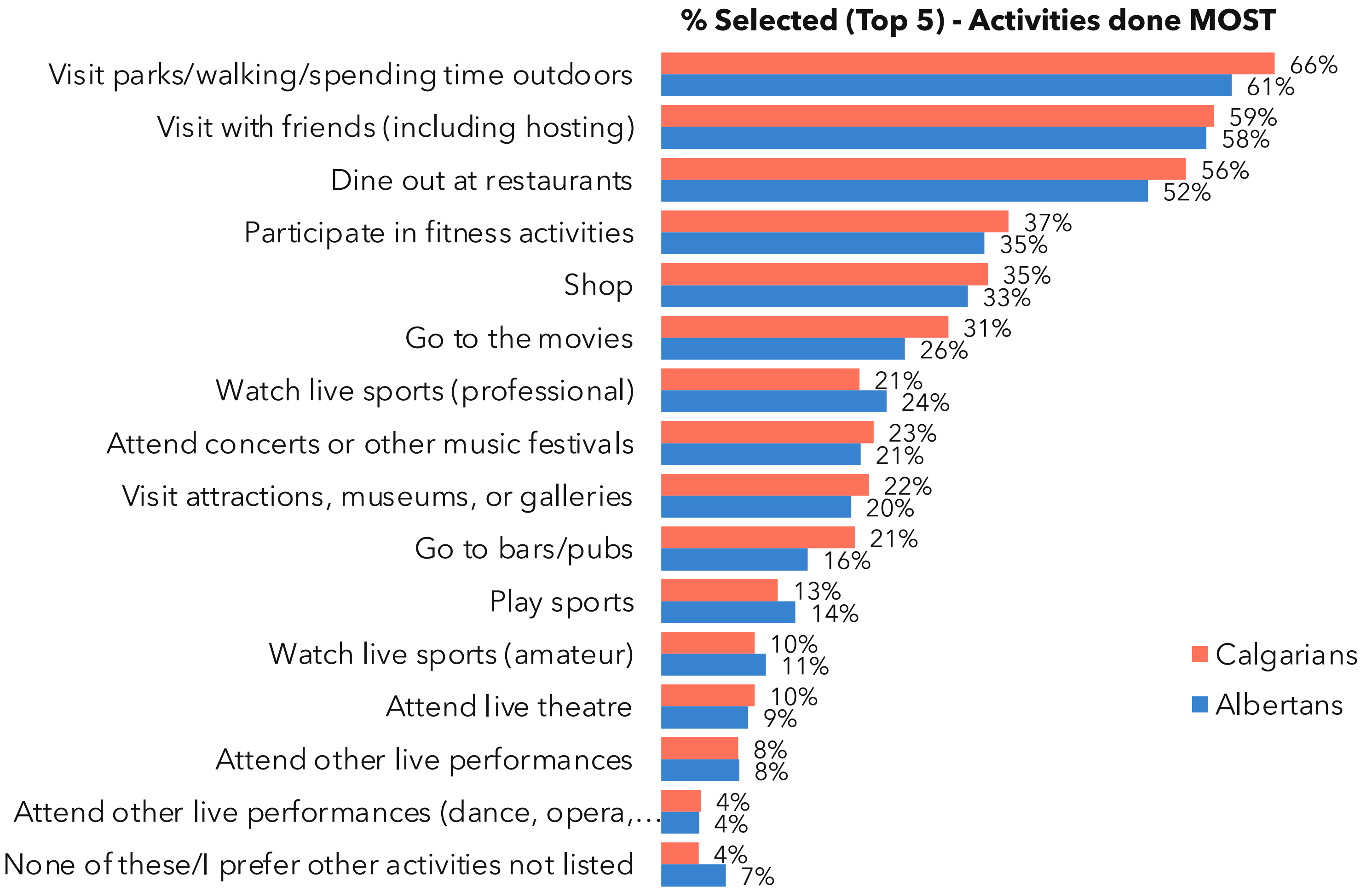
Audience Habits & Patterns

What are arts-engaged Calgarians doing today?

In terms of recreational activities, Calgarians spend slightly more time doing outdoor activities and dining out than the rest of Albertans.



Base: Calgarians (n=400); Albertans (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 Calgarians are looking to do (as with the rest of the province)

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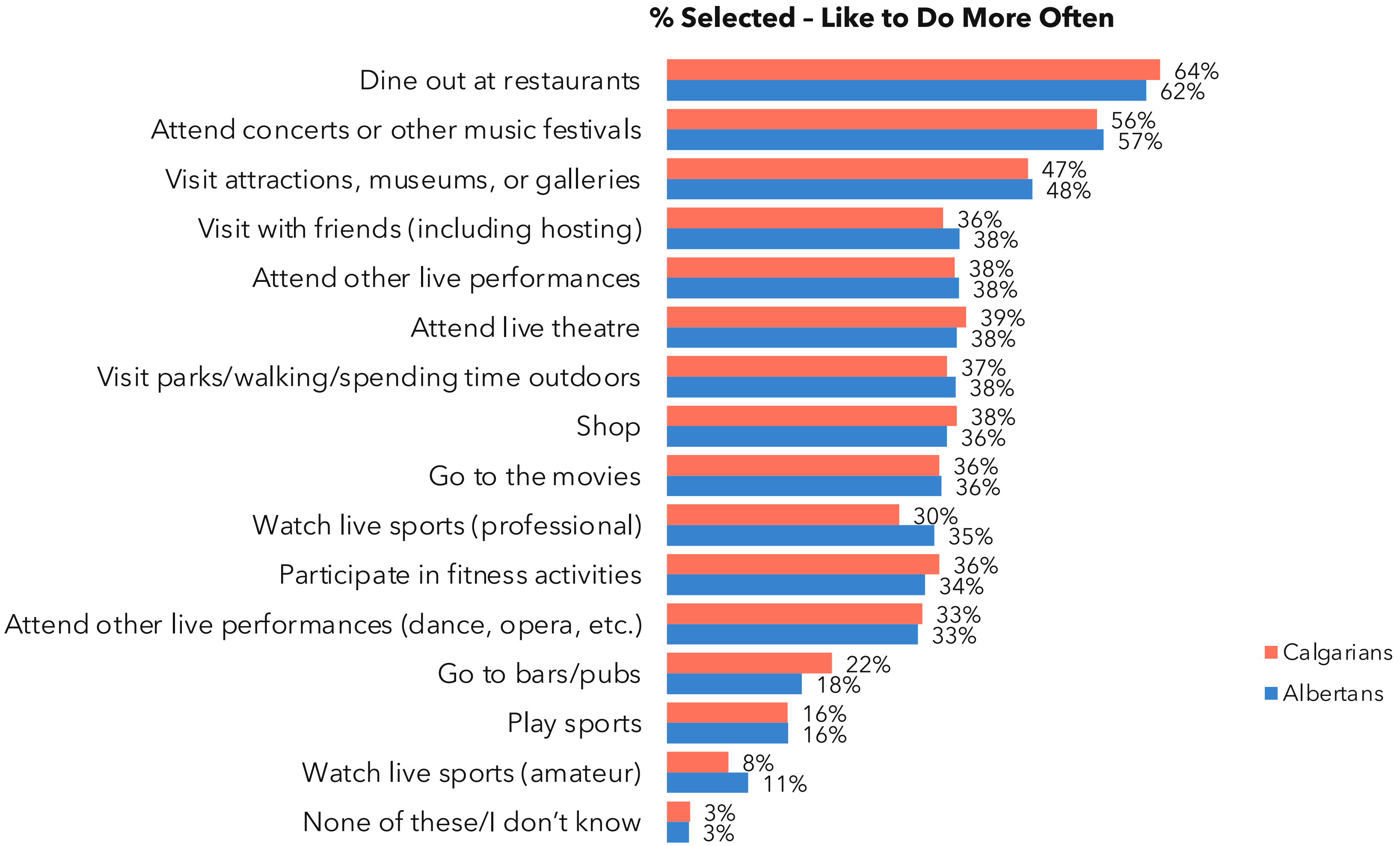
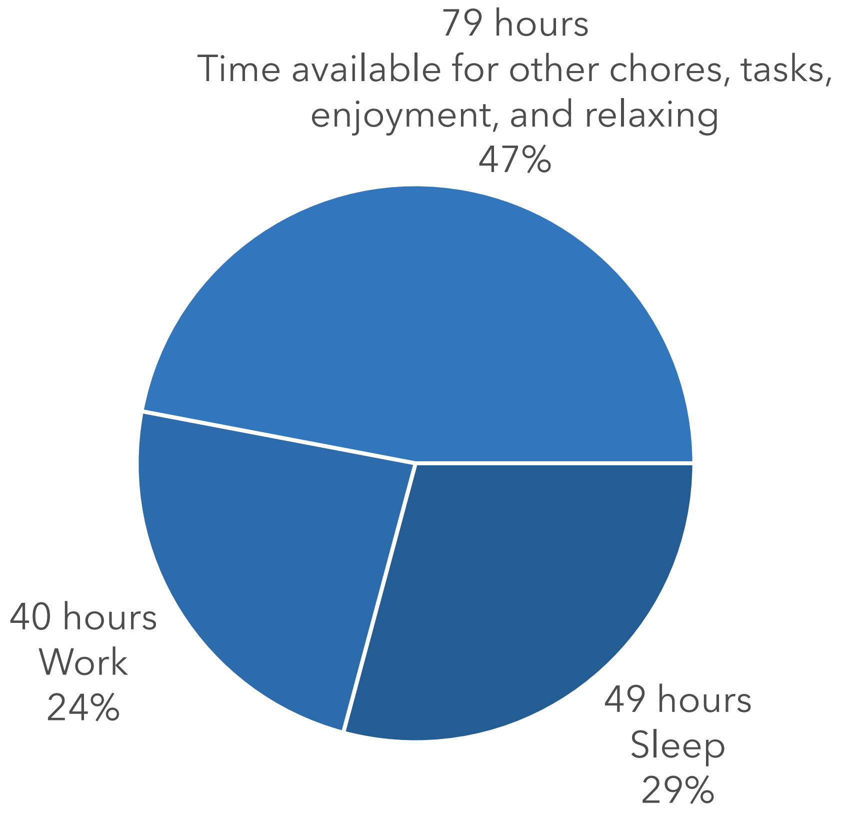


Base: Calgarians (n=400); Albertans (n=1,160)
Q16. If money or time were no object, which of the following would you like to do more often?

Understanding Albertan's 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, all Albertans spend their time…



What do they do during the available hours each week…

Albertans are feeling constrained with time, Calgarians are too

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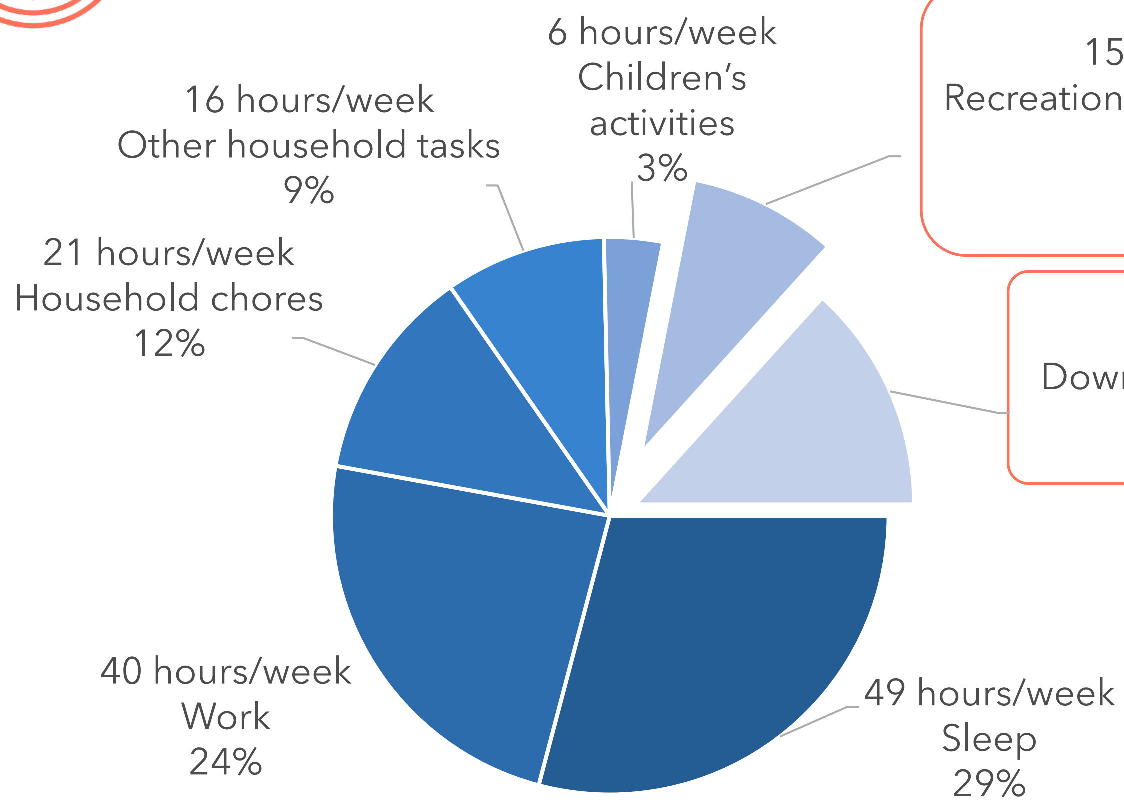
Previous research already demonstrated how intertwined elements of the experience economy are. An exploration of how Albertans spend their time shows the space for recreational activities is limited and the breadth of experiences that Albertans want to engage in. Carving out time for an audience that you don't own exclusively is a challenge; arts organizations are essentially competing for a small proportion of hours in a week.

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

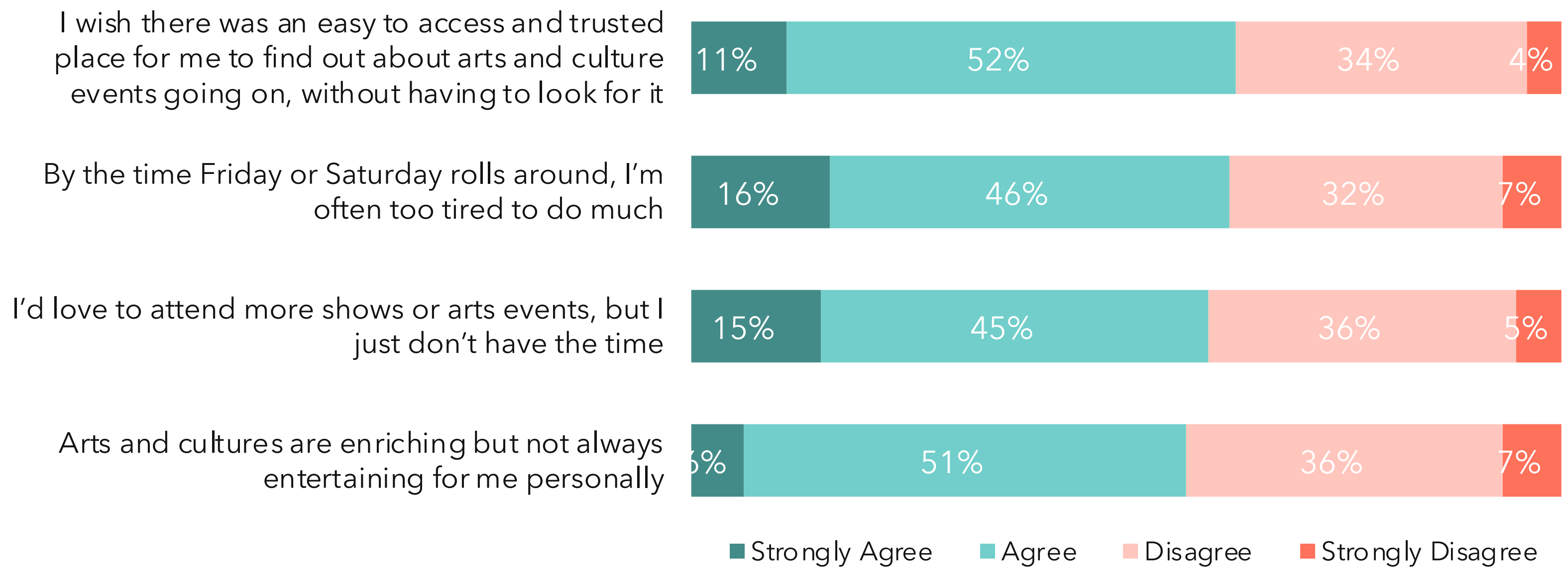


Organizations are **competing for just 15 hours** of Albertan's time **(16 hours for Calgarians)**. Those with greater engagement with the arts identify more time allotted to rec and hobbies.

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: Calgarians (n=400); Albertans (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%)

Attitudes towards time and entertainment value of the arts are similar to the rest of the province



% Agree

Calgarians	Albertans
63%	63%
62%	62%
59%	61%
57%	60%

Base: Calgarians (n=400); Albertans (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.

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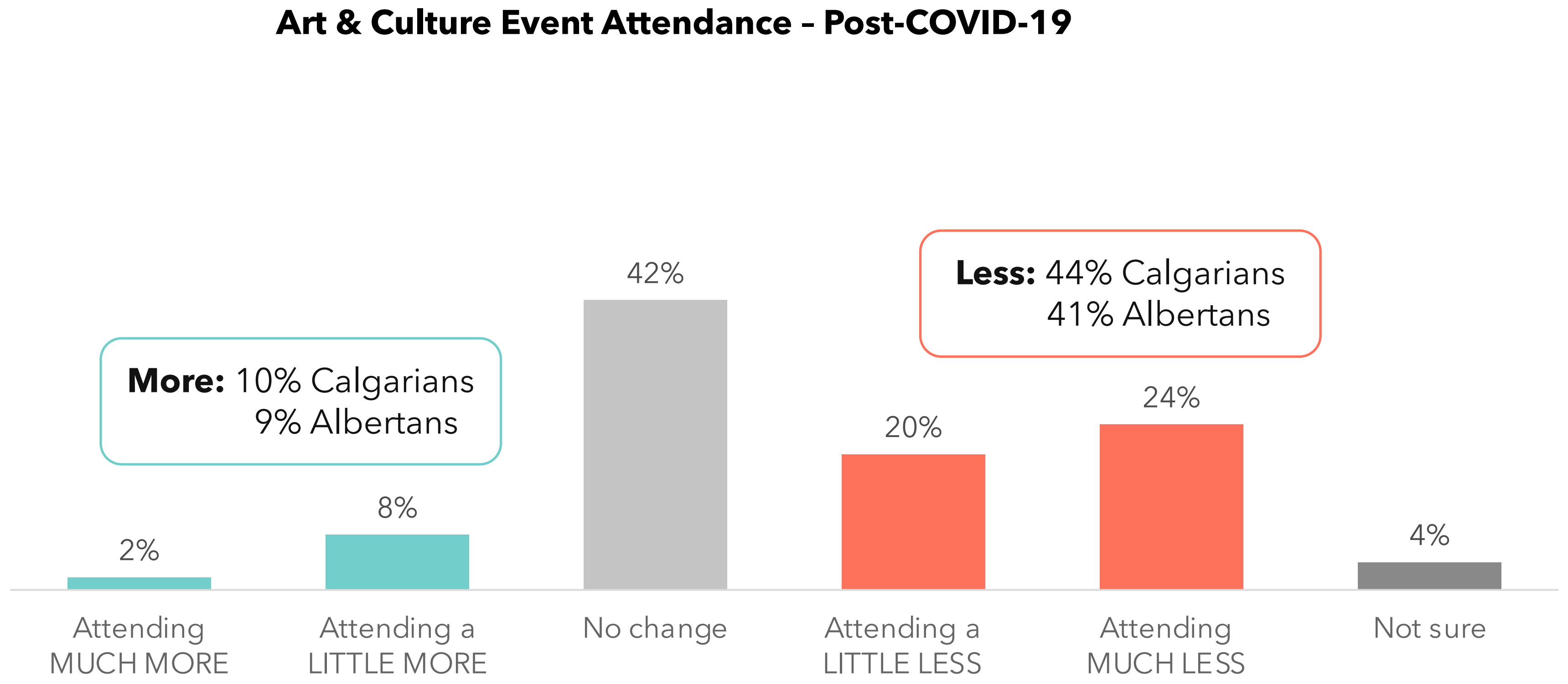
How have behaviours and perceptions shifted post-COVID?

Post-COVID, Calgarians are attending arts event even less than the rest of the province

The data supports what most arts organizations already know to be true – audiences are coming less often.



Base: Calgarians (n=400); Albertans (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 Calgary audiences from attending?

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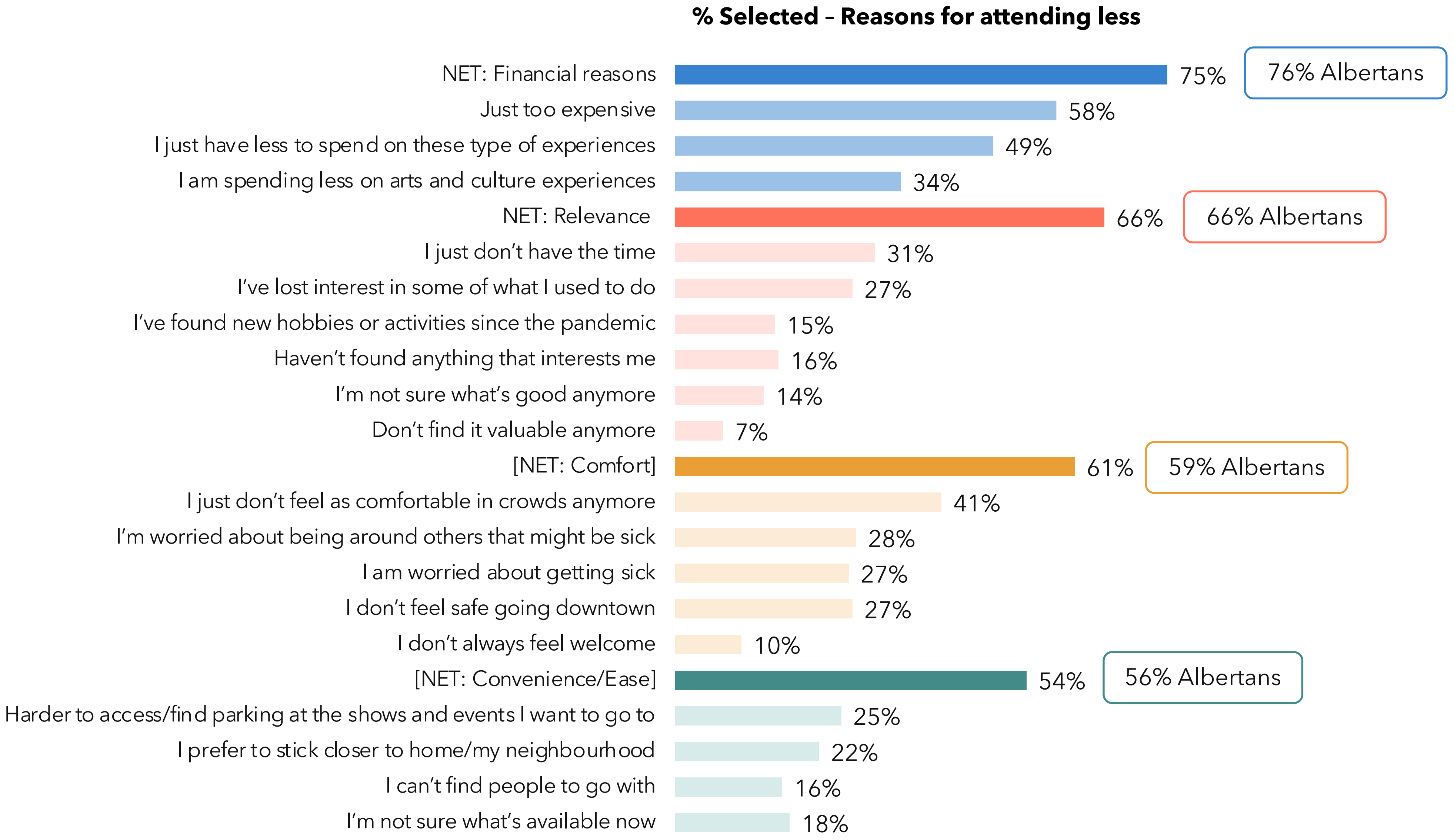

Base: Attend fewer arts events since Covid-19, Calgarians (n=117); Albertans (n=472)
Q22. Earlier you mentioned you attend fewer arts events than you used to. What are some of the reasons for this?

Calgarians indicate they feel slightly more knowledgeable about the arts but otherwise, attitudes do not vary dramatically

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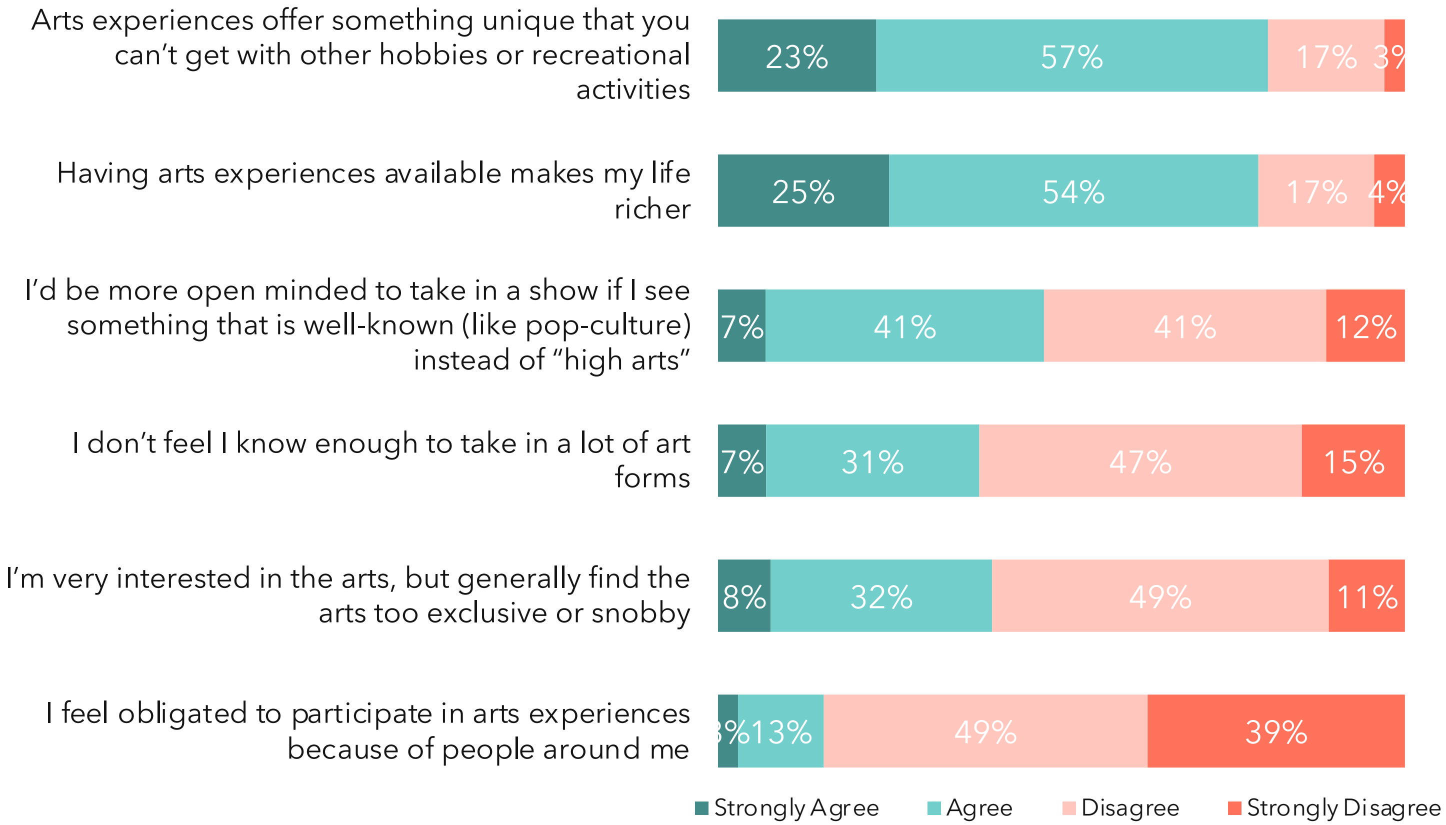

% Agree

Calgarians	Albertans
80%	79%
79%	78%
48%	47%
39%	44%
38%	40%
15%	15%

Base: Calgarians (n=400); Albertans (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.

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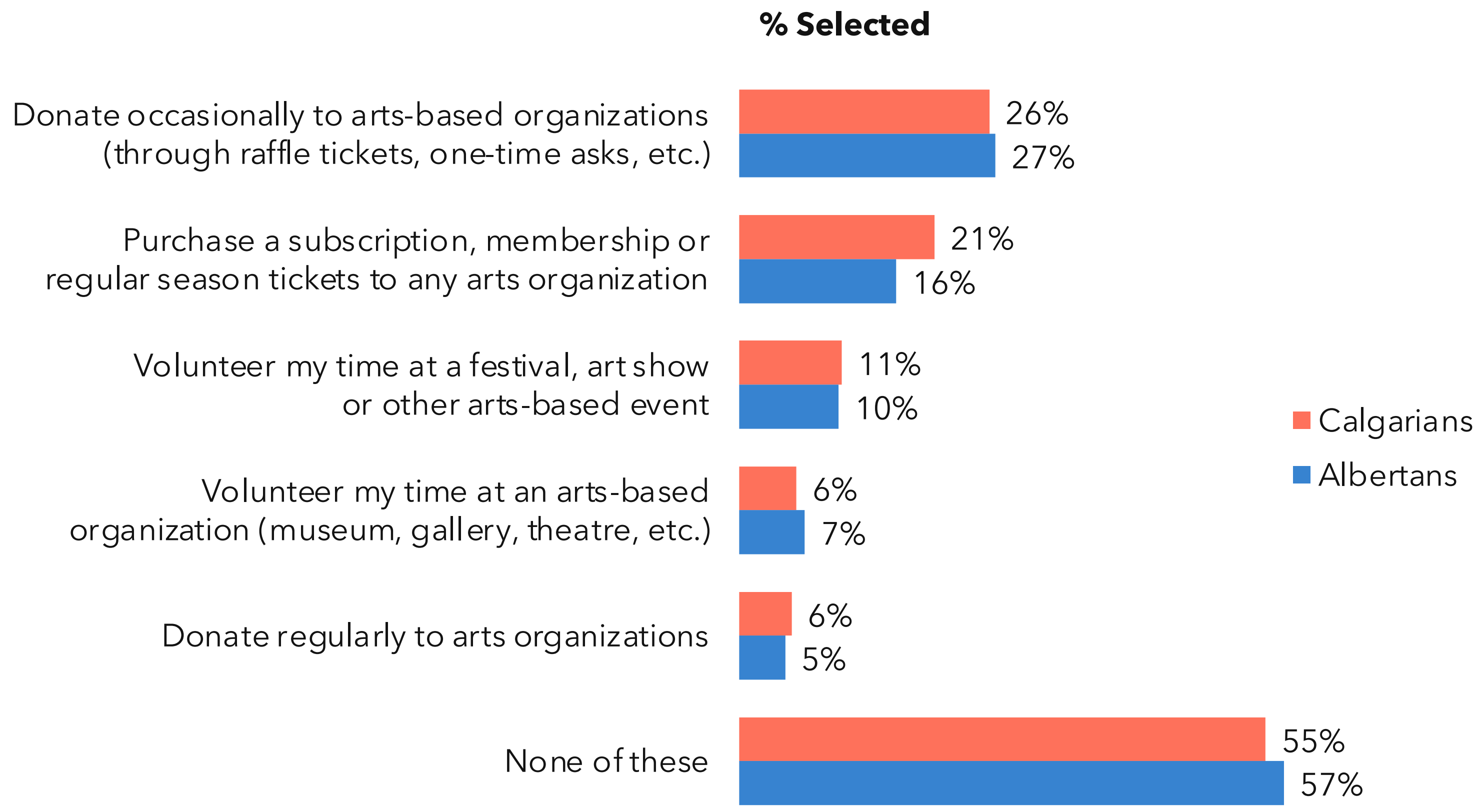
Understanding Support

Aside from attendance, how do Calgarians support arts organizations?

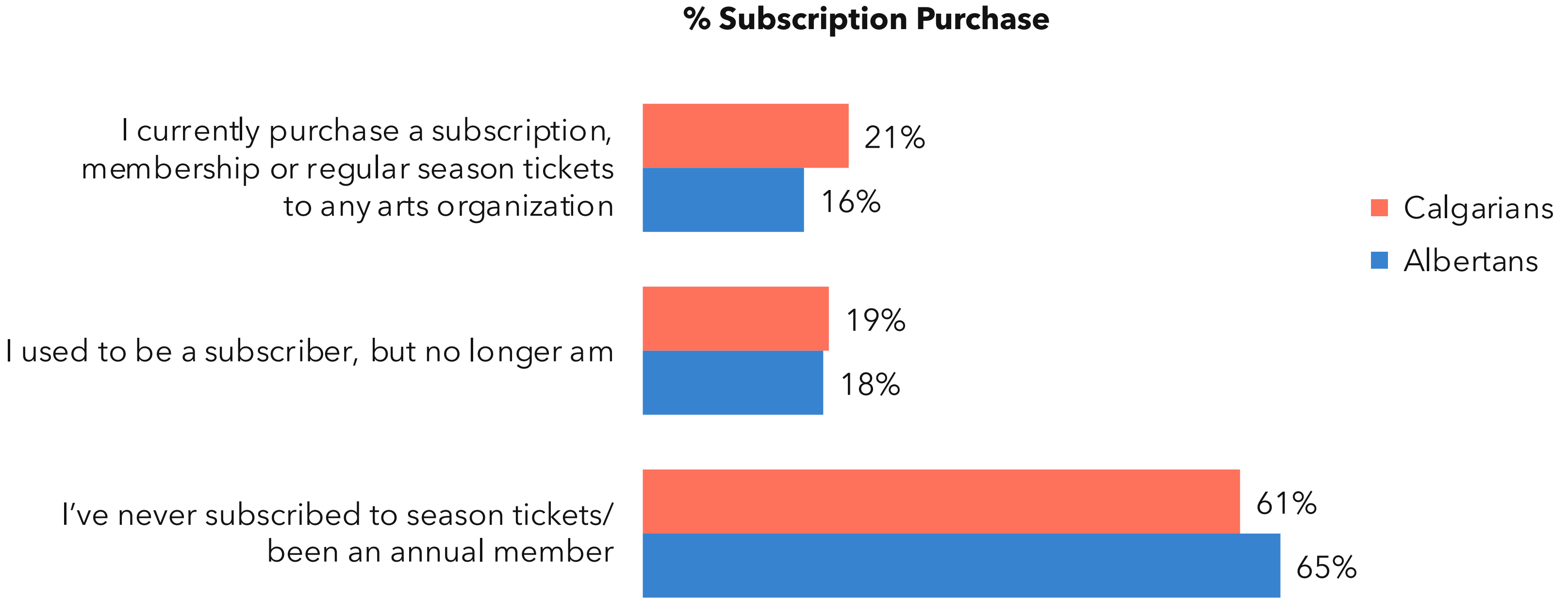
Similar to the rest of the province, just under half (45%) of arts-engaged Calgarians indicate supporting the arts through time or monetary means.



Base: Calgarians (n=400); Albertans (n=1,160)
Q12. And, do you do any of the following to engage with arts and culture organizations?

Subscriptions are highest among arts-engaged Calgarians

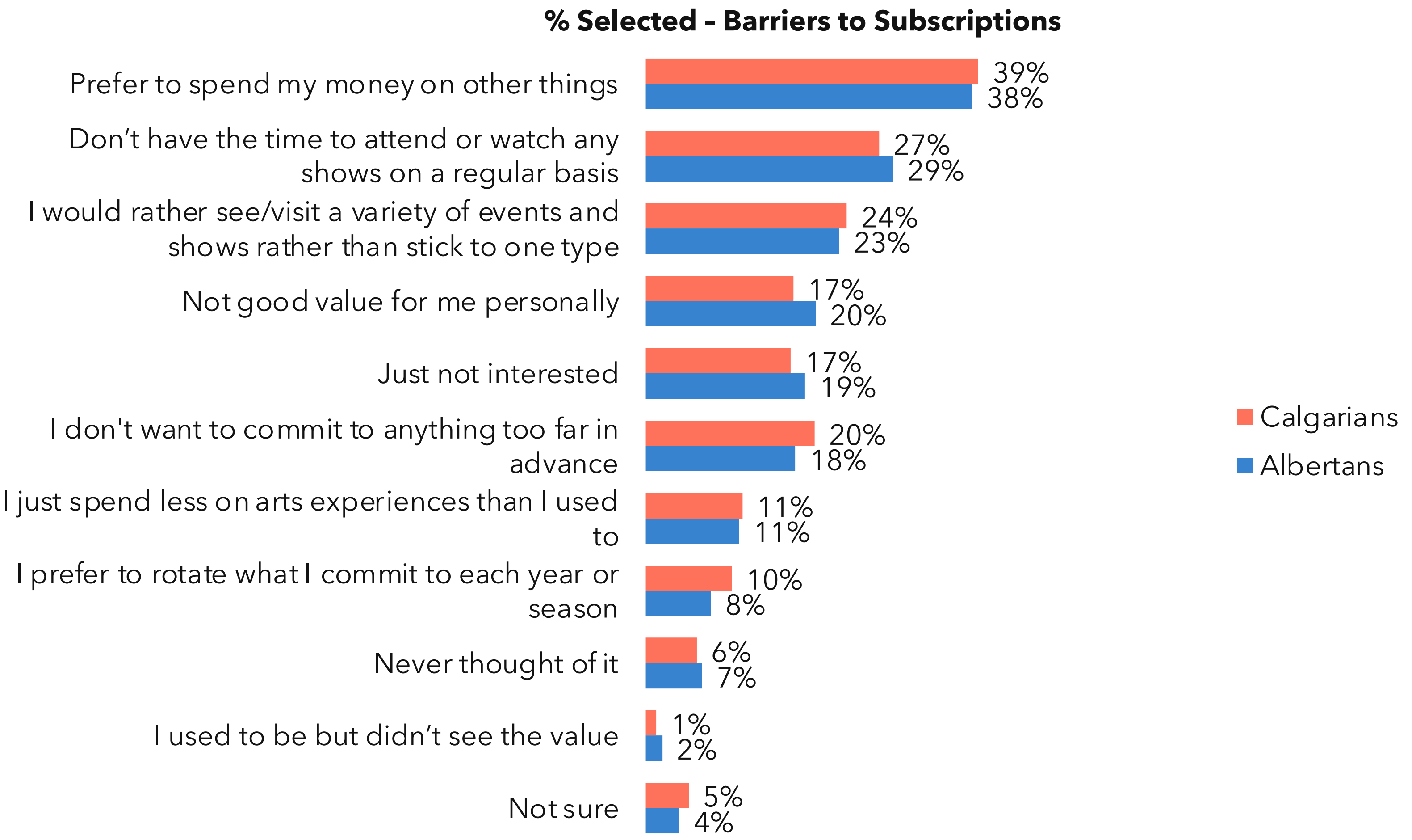
And have a similar proportion to the rest of Alberta of lost subscribers (19%). Many of those who are no longer subscribers are still attending, just in different ways.



Base: Calgarians (n=400); Albertans (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?

The barriers for Calgarians do not differ from the rest of Alberta. The value proposition is also a concern for Calgarians, but it is also about exploring new interests.



Base: Currently NOT a subscriber/member of any arts organizations, Calgarians (n=318); Albertans (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

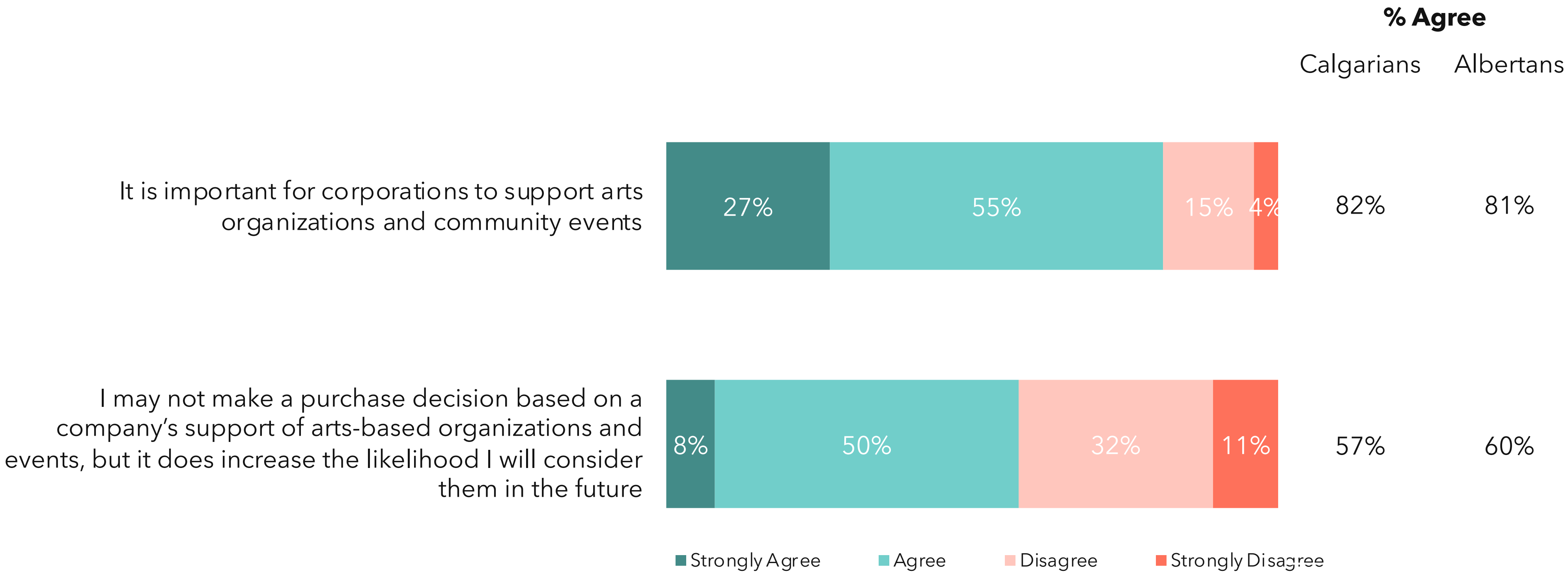
The proportion of Calgarians who have indicated purchasing a subscription for the purpose of supporting (not attending) is significant – similar to arts-engaged Albertans in the rest of the province. Those more likely to support include older Calgarians and immersed audiences.

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

Base: Calgarians (n=400); Albertans (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?

Calgarians indicate businesses have a role to play

Calgarians hold a similar view about the role of businesses. There is strong agreement for the important role businesses play in supporting arts organizations and community events.



Base: Calgarians (n=400); Albertans (n=1,160)
Q27. Please indicate your level of agreement with the following statements on corporate or business support of arts organizations.

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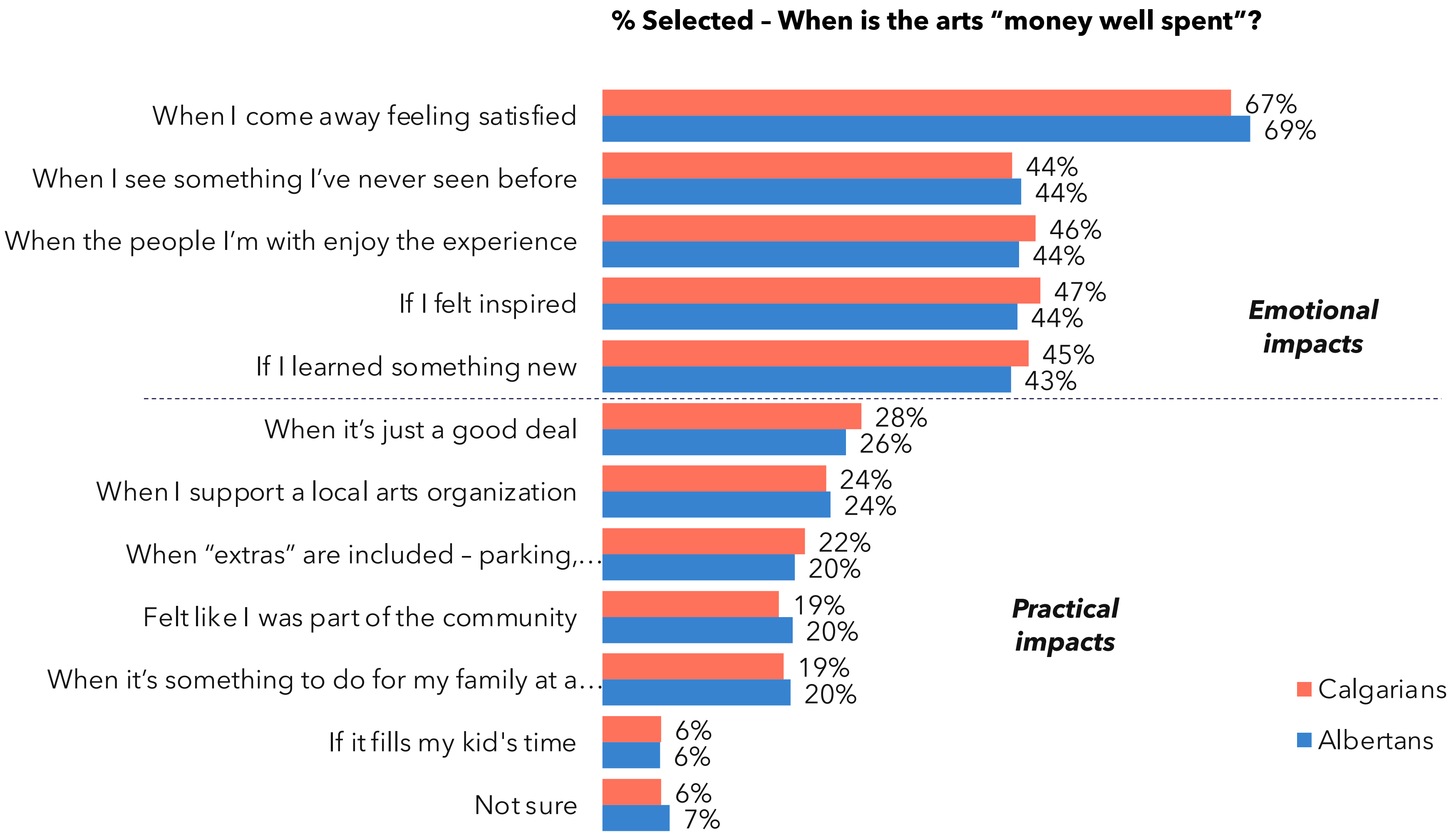
(Re) defining Experiences

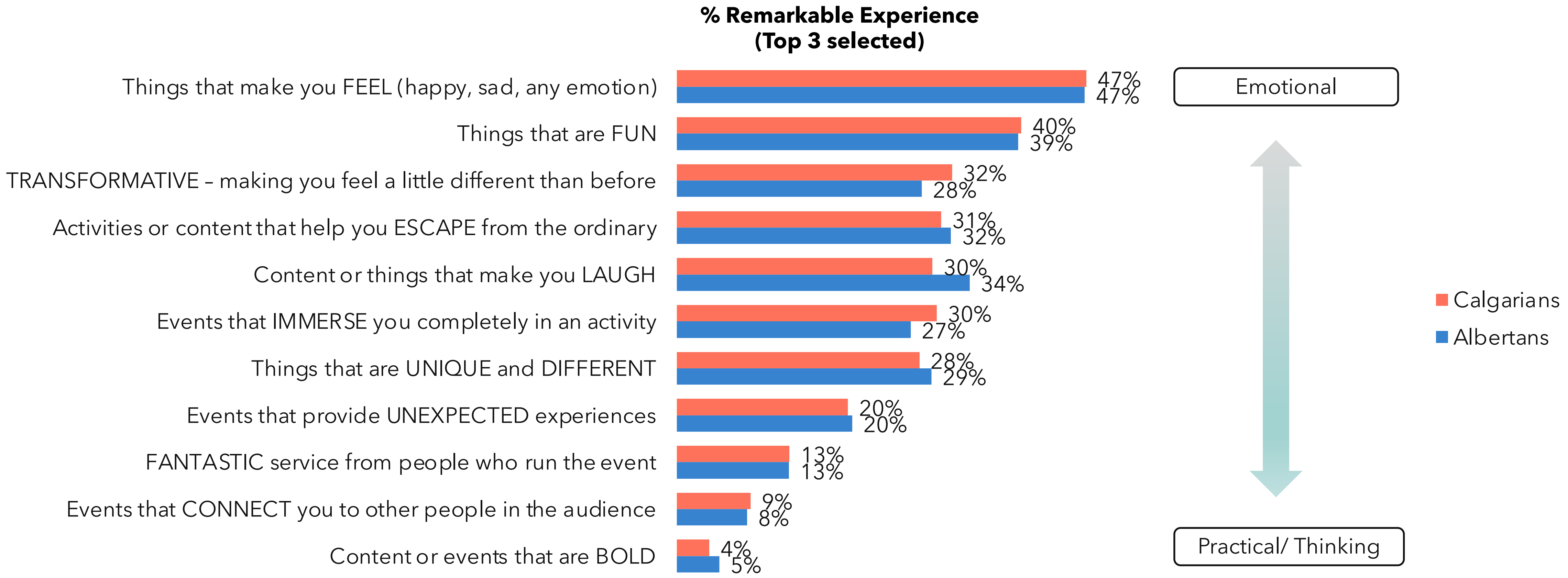
As with the rest of the province, value is driven by emotional impacts to feel it was "worth it"



Base: Calgarians (n=400); Albertans (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

Calgarians only slightly differ from Albertans when it comes to describing a remarkable experience. They are slightly more likely to want transformative and immersive experiences.

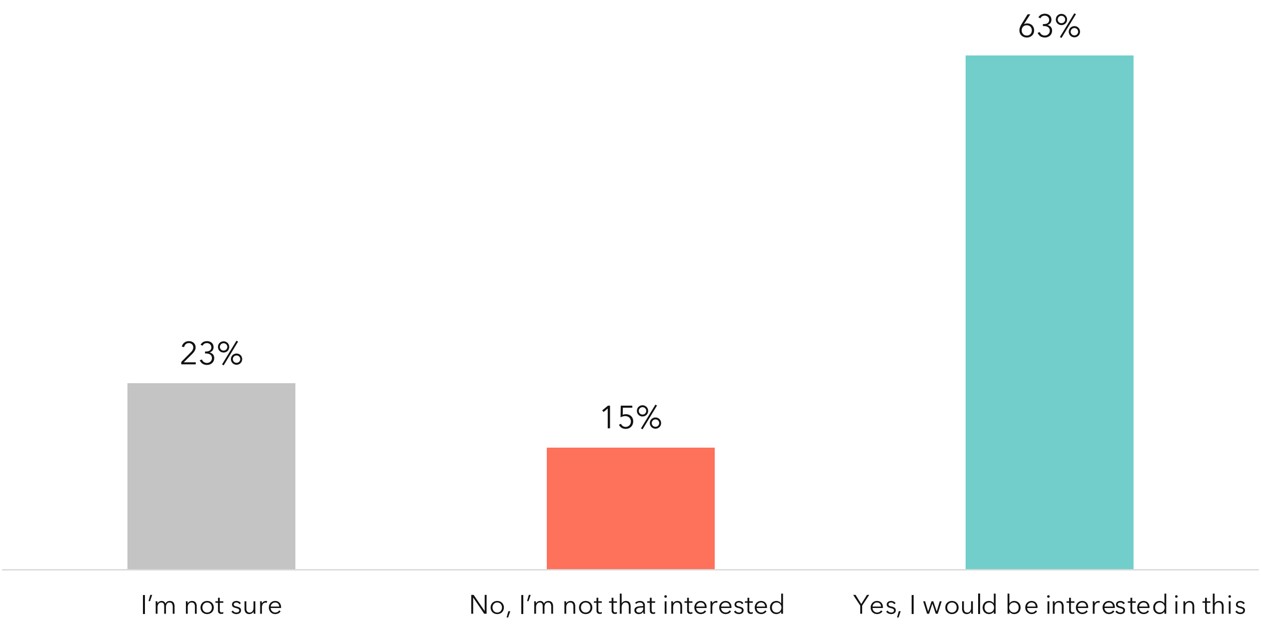


Base: Calgarians (n=400); Albertans (n=1,160)
Q24. Below are a series of words and statements that could be used to describe remarkable experiences people may have when engaging with arts and culture experiences. Thinking about your own experiences and expectations, which words or phrases best describe 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.

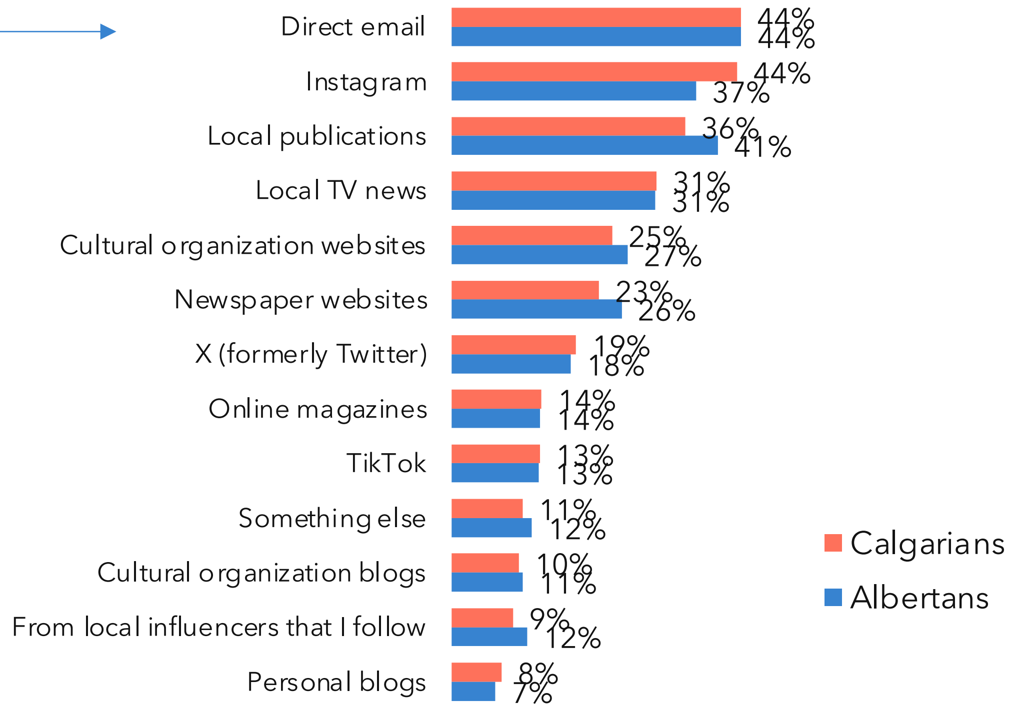
Informing Audiences: moving away from curated sources

The desire for most Calgarian audiences is to use digital sources for information due to the ease and accessibility. The challenge of breaking through with new offerings is similar across Albertan audiences because these opt-in sources are options that audiences have already indicated an interest or preference in.

% Interest – Broad-based experience and events listing



% Selected – preferred sources



Base: Calgarians (n=400)
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; Calgarians (n=341); Albertans(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.

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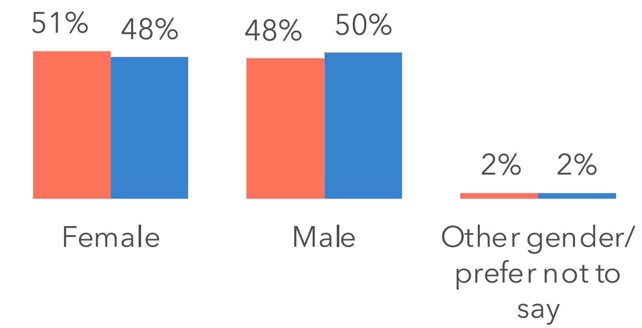
Respondent Profile

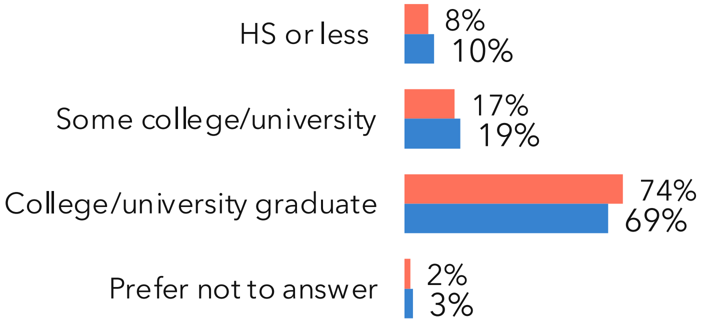
Respondent Profile: Who We Heard From

- Calgarians
- Albertans

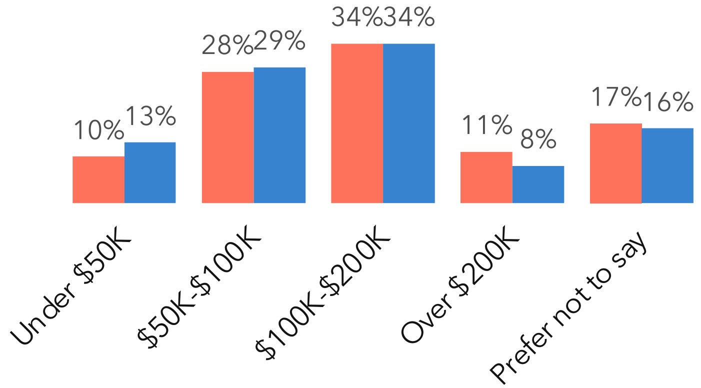
Gender



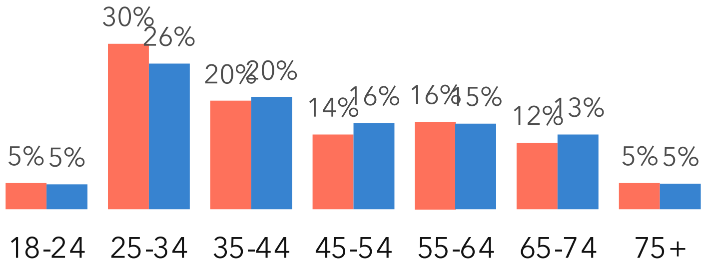
Education



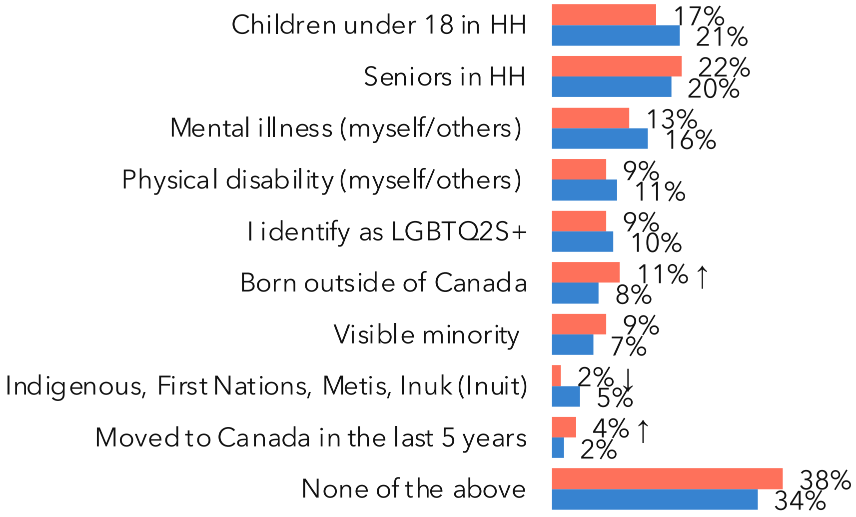
HH Income



Age

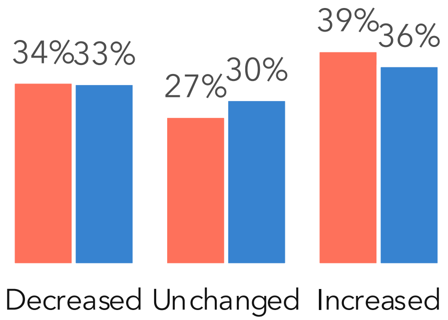


Diversity/Identity



Income Change

PAST 3 YEARS



Base: Calgarians (n=400); Albertans (n=1,160)

Understanding people.

It's what we do.

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Questions or Comments?

Please contact kim@stone-olafson.com
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