

# Spotlight on Arts Audiences

Wave 1 Results: Edmonton  
Winter 2023-2024



# Table of contents

4	Purpose & Objectives
5	Research Approach
6	Key Findings & Implications
7	Key Findings & Implications
8	Profiling Calgarians Based on Engagement
15	Audience Habits & Patterns
21	How Have Behaviours Shifted?
25	Understanding Support
31	(Re) defining Experiences
35	Respondent Profile

# 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:

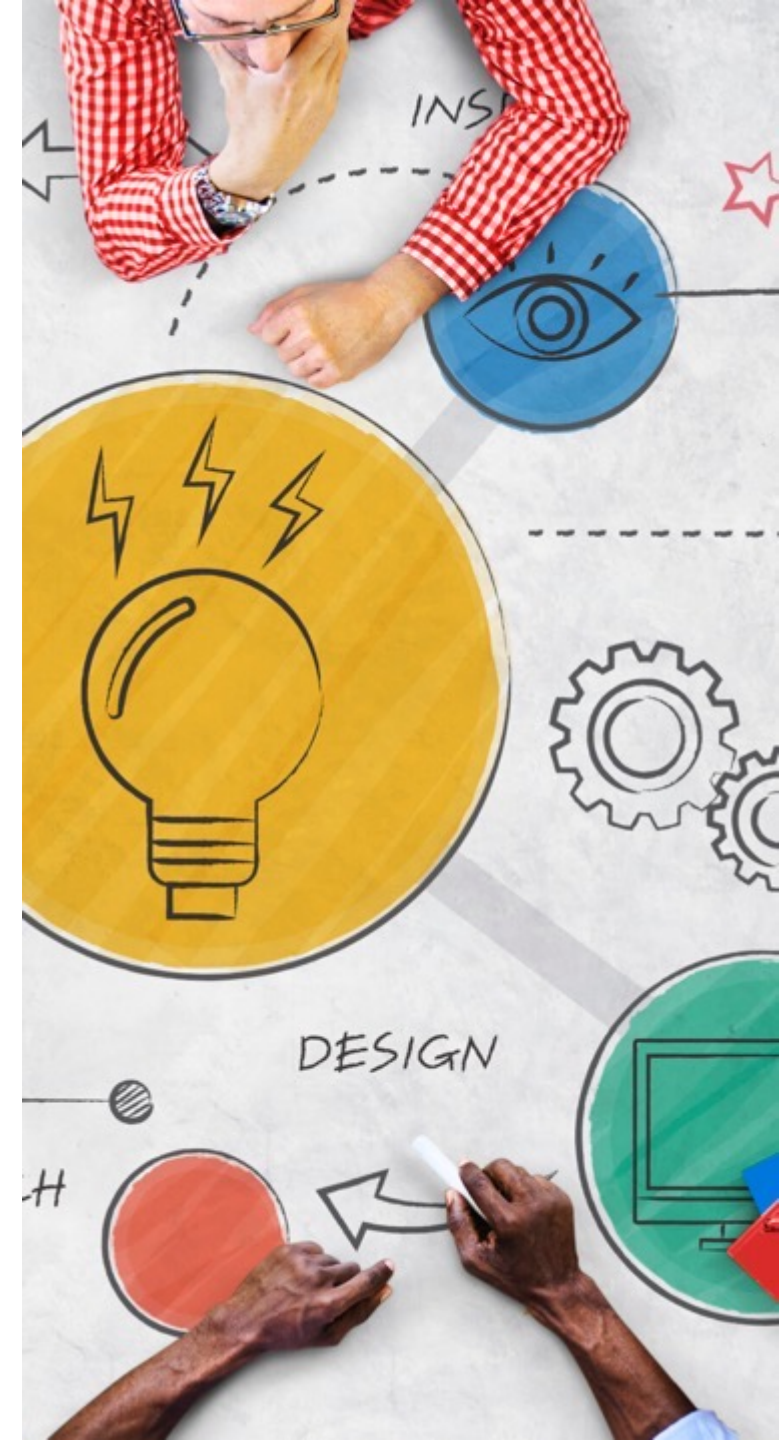
Alberta continues to be at a crossroads brought by a pandemic that has changed public life and re-shaped our economy. This is especially true in the arts sector which continues to experience a decline in engagement with events and activities. This work was developed for this sector exclusively. It builds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

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

**The survey was conducted between November 6<sup>th</sup> -16<sup>th</sup>, 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 **Edmonton region** only. Results are shown alongside total results to provide a directional comparison to other areas of the province.***



The image features three dark silhouettes of people against a light, textured background. On the left, a person is walking away from the viewer. In the center, a person stands with their back to the viewer, their right arm raised and hand open. On the right, a person stands with their back to the viewer, holding a cane or umbrella over their shoulder. The overall mood is artistic and contemplative.

# Key Findings and Implications

# What is different in Edmonton?

## Slightly more engaged and desire unique

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The vast majority of Albertans are engaged with arts and Edmontonians are no different. In fact, they are slightly more active in attendance of art events and creation.

To them, a remarkable experience is one that let's them feel, is fun, and makes them laugh. In addition, they appreciate new or unique experiences slightly more than the rest of Alberta.

## The most constrained for time

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Edmontonians indicate they *want* to attend more frequently, but simply do not have the time (67% among Edmontonians and 61% among Albertans). In fact, they state they have slightly less time for recreation activities (14 hours per week) than the rest of the province (15 hours per week). The competitive landscape is a challenge to overcome.

This means it is important to demonstrate the value and relevance of your programming.

## Continue momentum with varied art forms

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Half of Edmontonians feel like they do not know enough to take in a lot of art forms (44% of Albertans). They have an open mind to pop-culture art forms over “high arts” and some find arts enriching but not always entertaining.

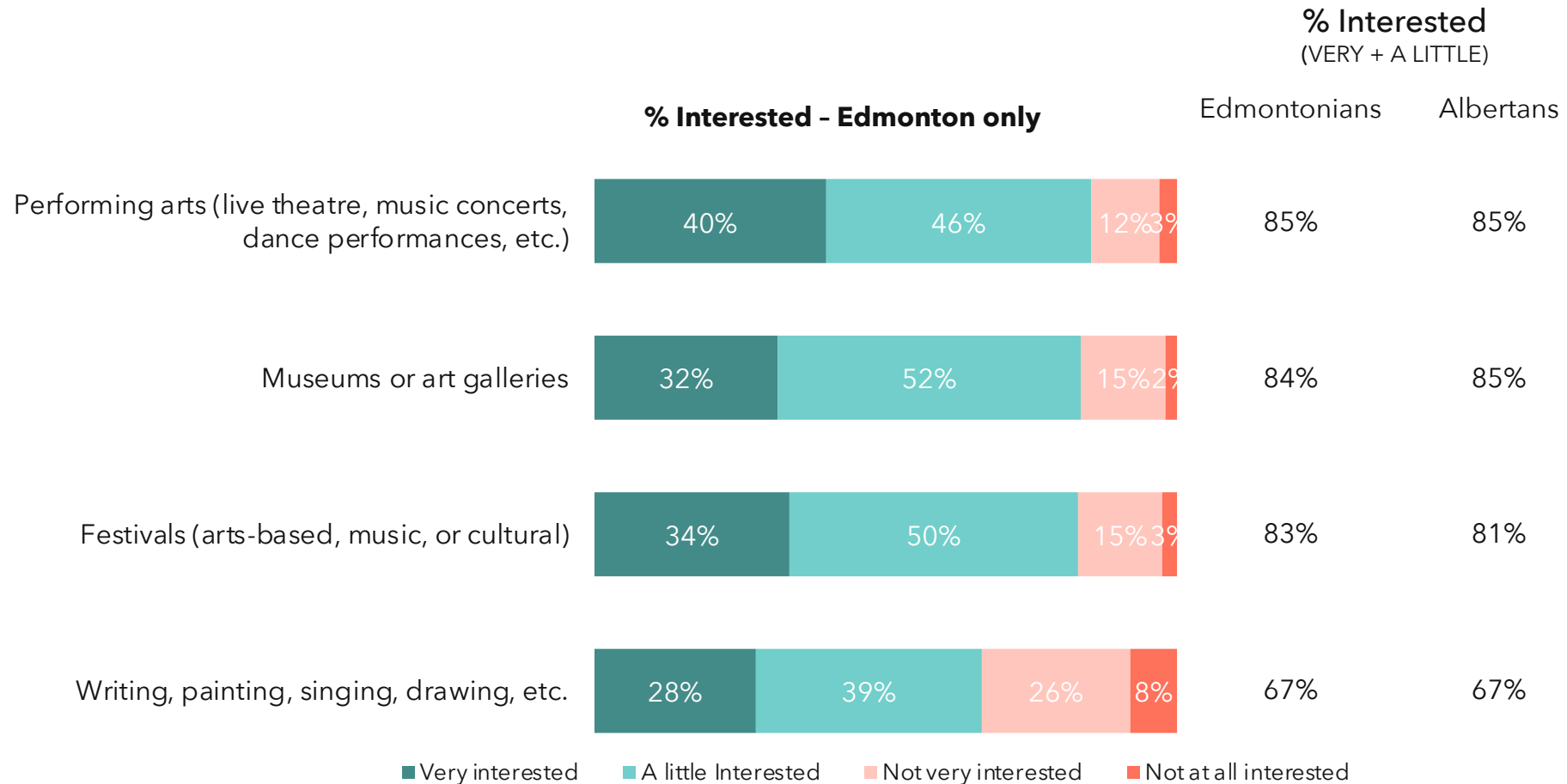
There is potential to increase engagement with greater ease of finding out about events going on. 68% wish there was an easy and trusted place to access this information (63% of Albertans).



# Profiling Edmontonians based on their engagement with the arts



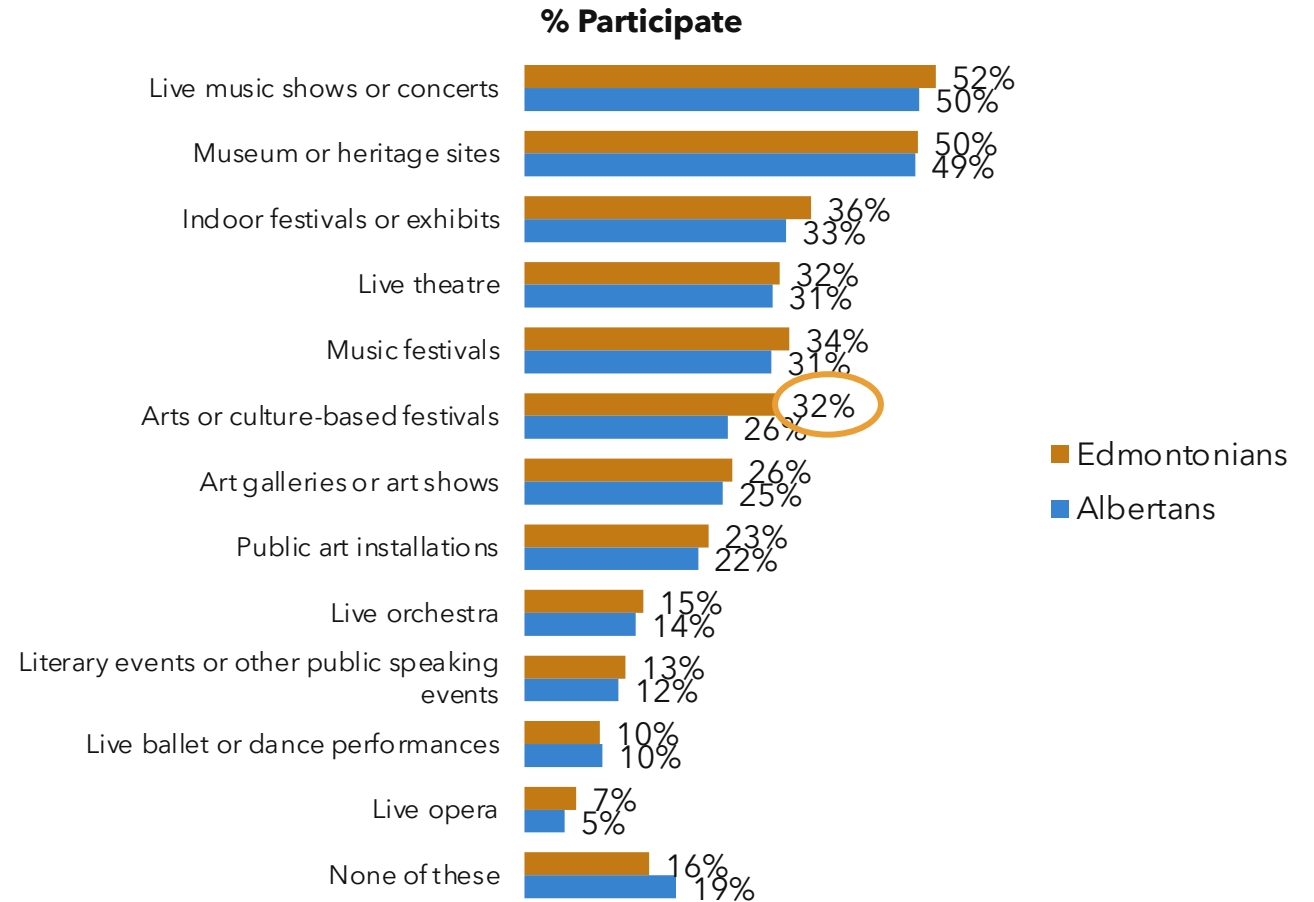
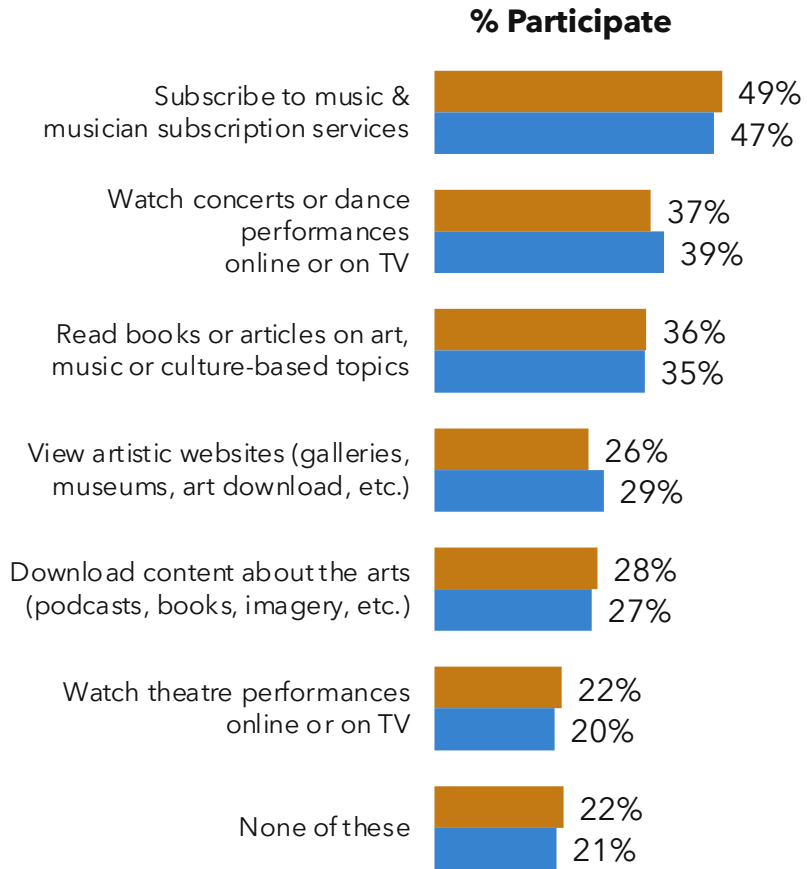
# Edmontonians reflect the rest of the province with their interest level in the arts





# Edmonton Engagement (Observation and Attendance)

Edmontonians observe at very similar levels to the rest of the province, but they attend more activities and events more frequently – only slightly more among many events, but significantly greater participation with festivals.



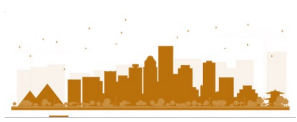
Base: Edmontonians (n=400); Albertans (n=1,160)

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?

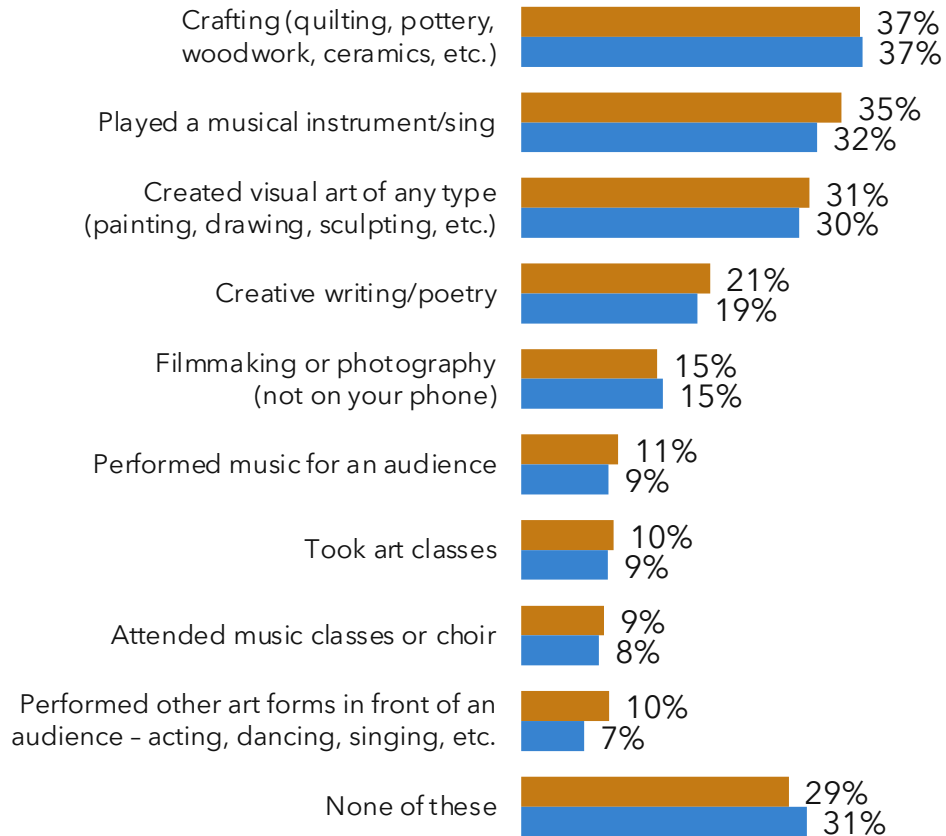


# Edmonton Engagement (Creation and Support)

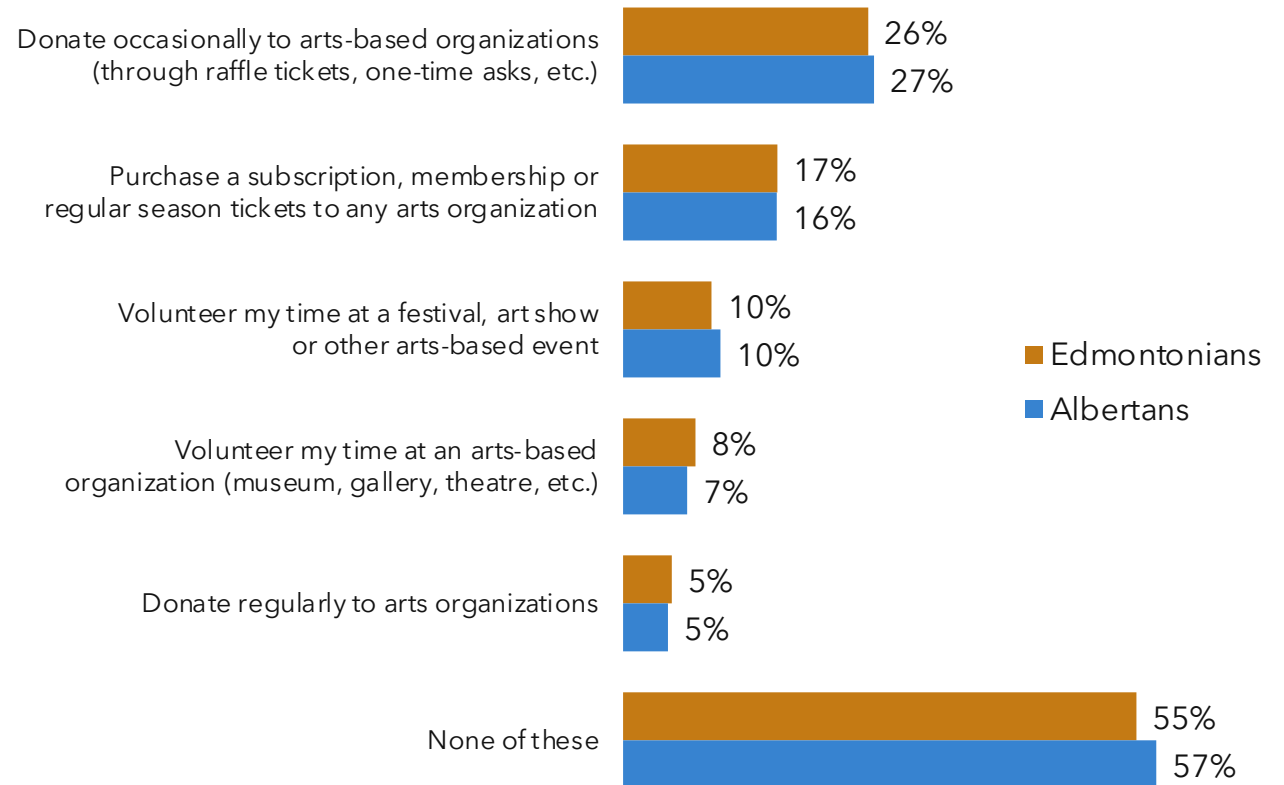
They also create slightly more than the rest of Alberta, while support levels show little difference compared to the rest of the province.



**% Done - Past Year (Create)**



**% Selected (Support)**



Base: Edmontonians (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 Edmonton



Nearly all (97%) of Edmontonians 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.

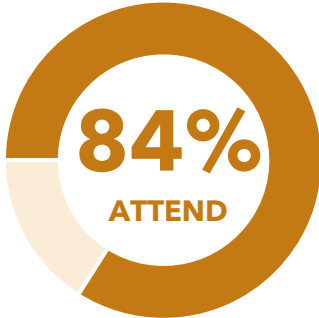


2.5 activities on average



### ATTEND

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

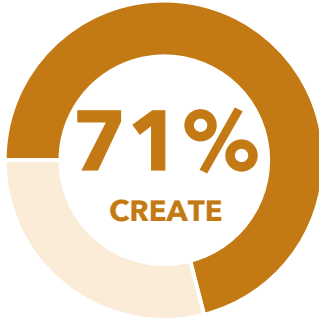


3.9 activities on average



### CREATE

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



2.5 activities on average



### SUPPORT

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



1.5 activities on average

# Creating segments based on engagement



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).

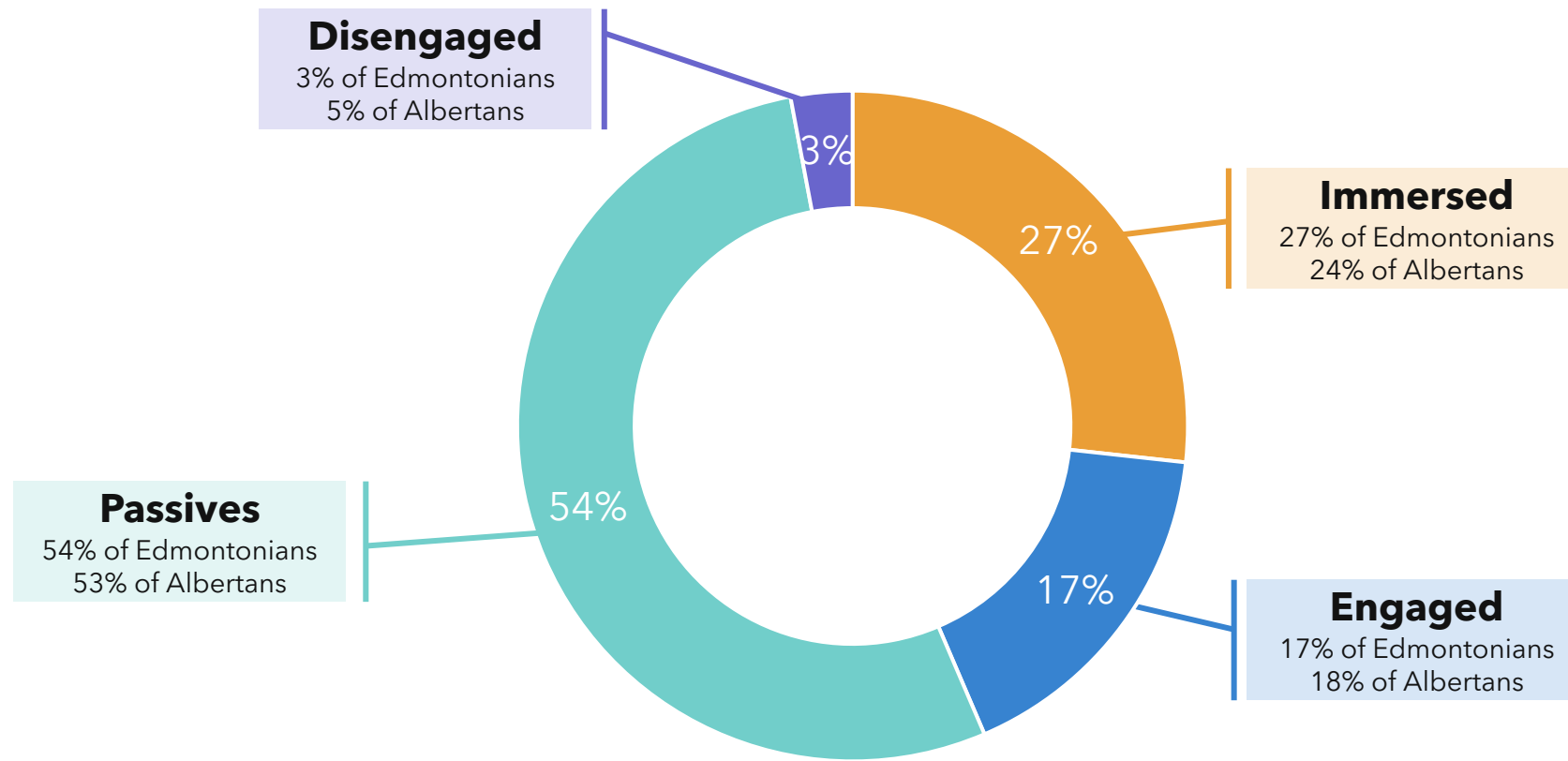
## Disengaged

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 Edmontonians)

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 Edmonton market.

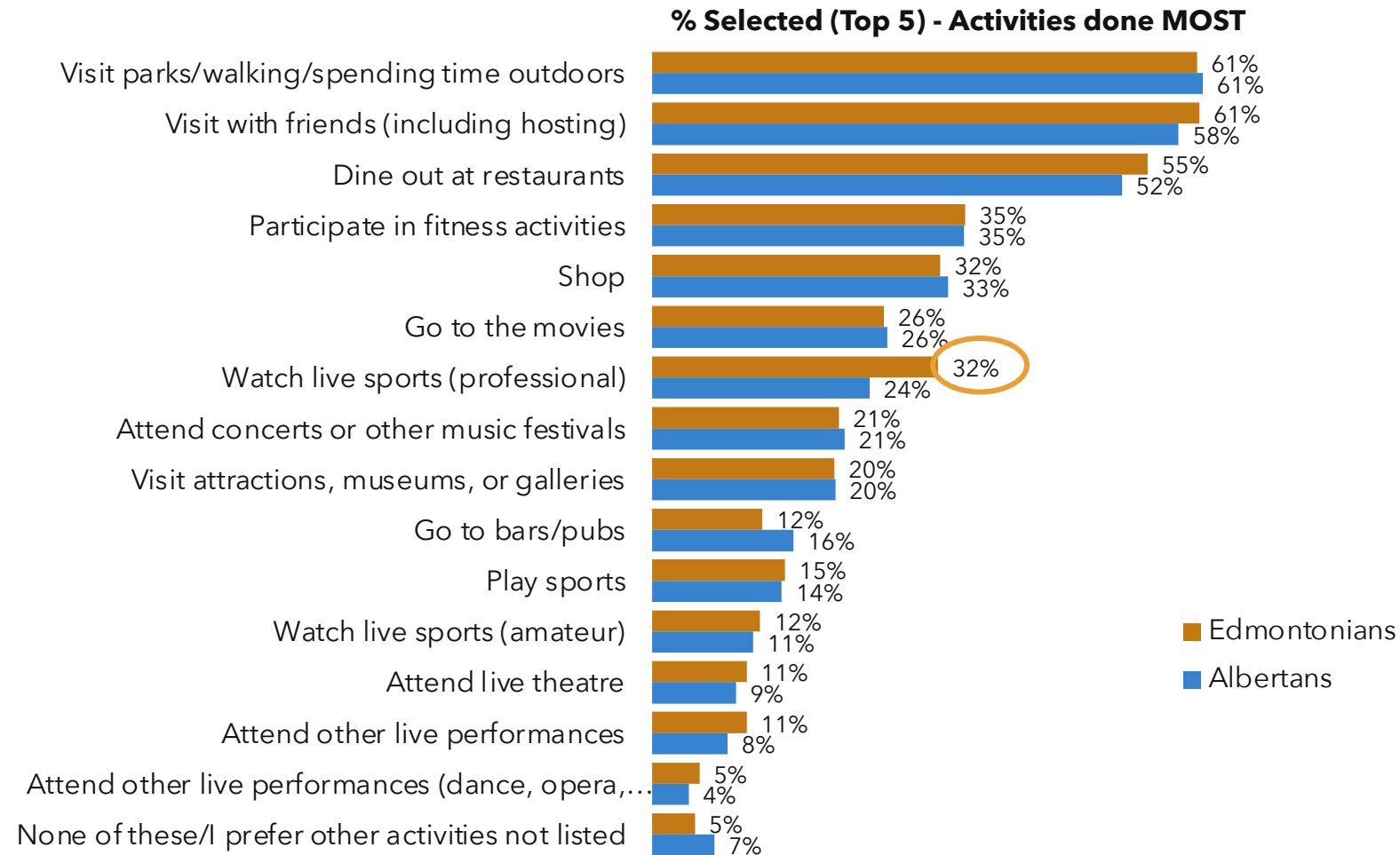


# Audience Habits & Patterns



# What are arts-engaged Edmontonians doing today?

In terms of recreational activities, Edmontonians spend more time watching live professional sports than the rest of Albertans.



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

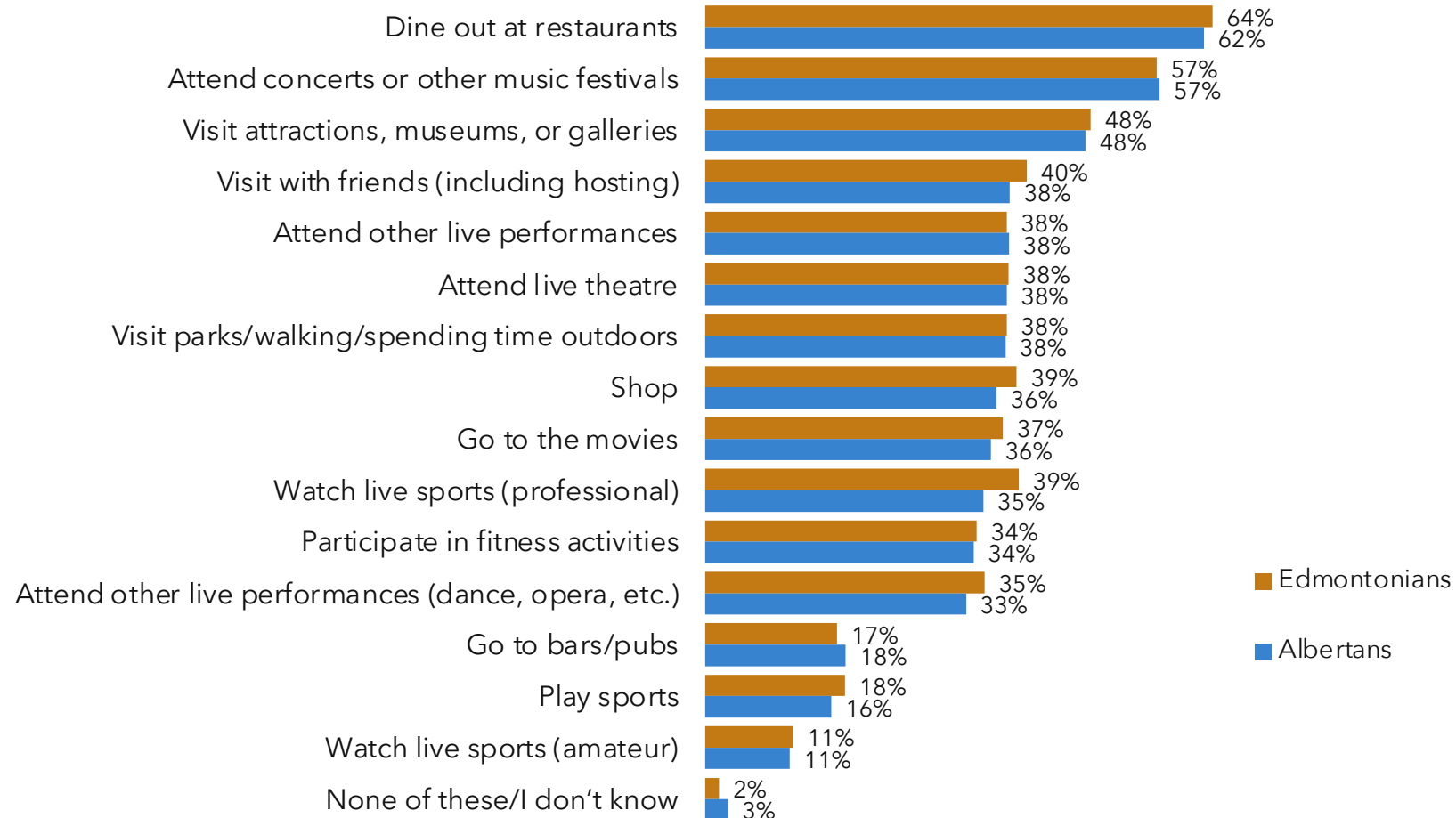
Q15. In terms of recreation/discretionary activities, please select the activities you do MOST in this category (select your top 5 activities).



# But increasing participation in the arts is what Edmontonians are looking to do (as with the rest of the province)



**% Selected - Like to Do More Often**



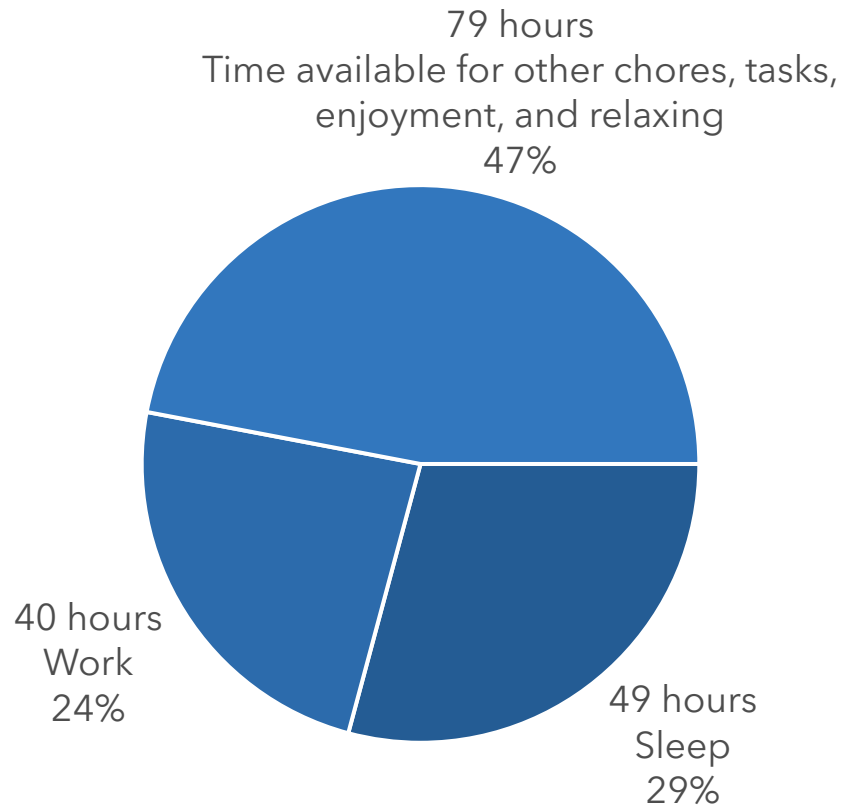
Base: Edmontonians (n=400); Albertans (n=1,160)  
Q16. If money or time were no object, which of the following would you like to do more often?

# 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...



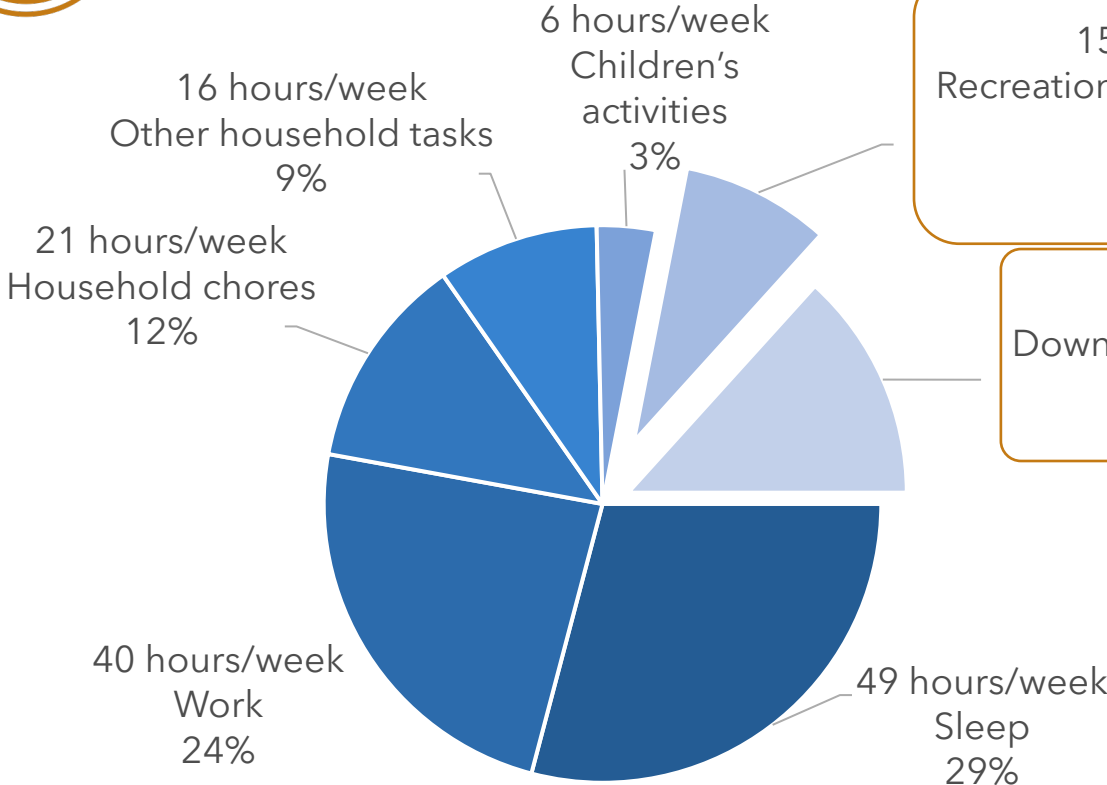
**What do they do during the available hours each week...**

# Albertans feel constrained with time, Edmontonians do too

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...



15 hours/week  
Recreation, fitness and hobbies  
9%

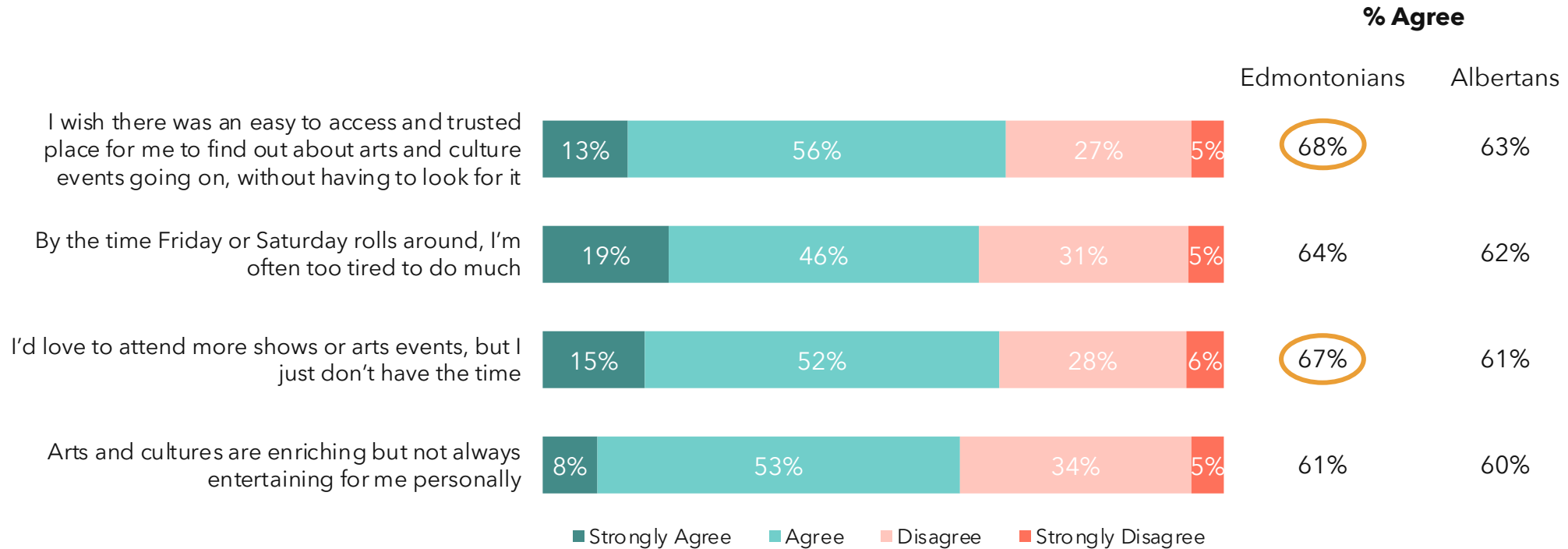
Organizations are **competing for just 15 hours** of Albertan's time (**14 hours for Edmontonians**). Those with greater engagement with the arts identify more time allotted to rec and hobbies.

22 hours/week  
Downtime/relaxation time  
13%

**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: Edmontonians (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%)

# Edmontonians are feeling the time constraints more than the rest of Albertans. They also have a greater interest in having one source of information to find out about arts and culture events



Base: Edmontonians (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.



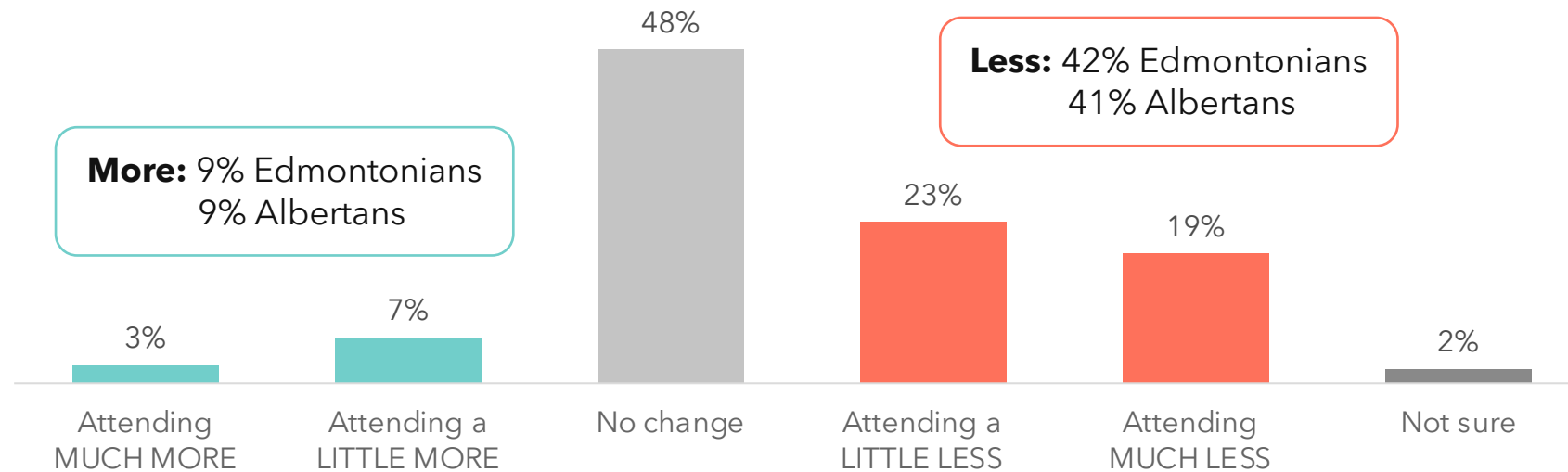
**How have behaviours and  
perceptions shifted post-COVID?**

# Post-COVID, Edmontonians are attending arts event at the same frequency as the rest of the province

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



## Art & Culture Event Attendance - Post-COVID-19



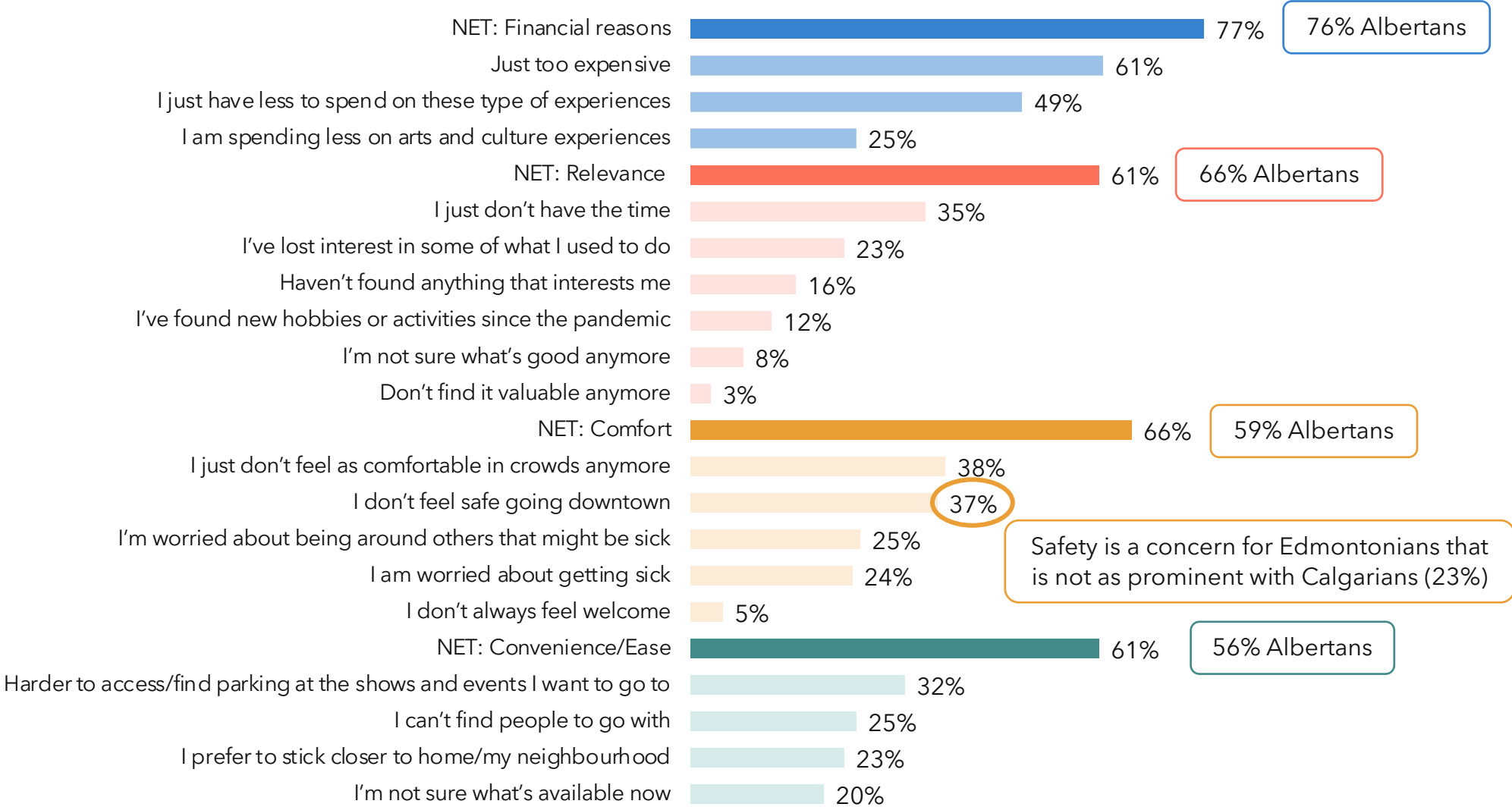
Base: Edmontonians (n=400); Albertans (n=1,160)

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 Edmontonian audiences from attending?



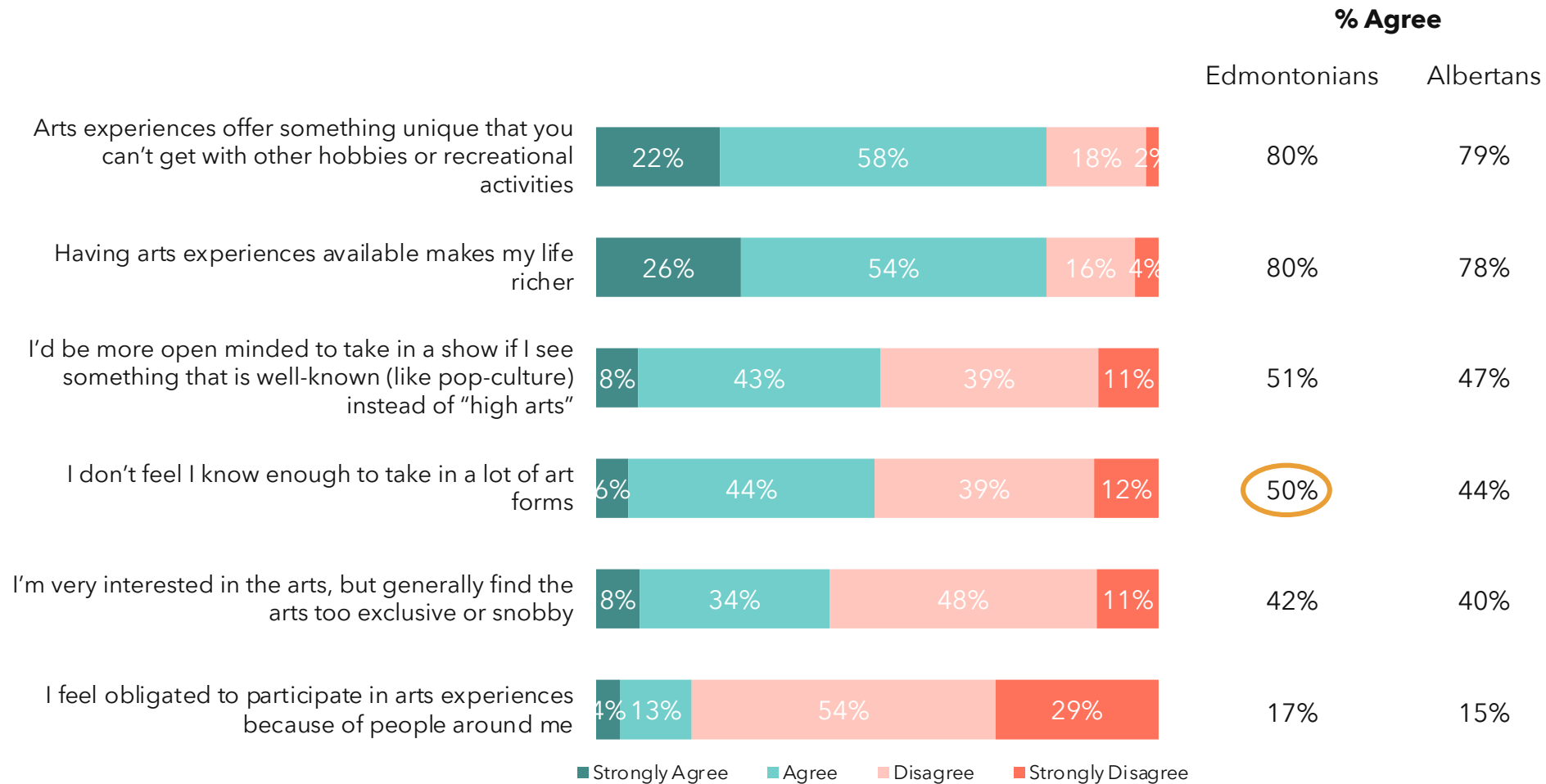
**% Selected - Reasons for attending less**



Base: Attend fewer arts events since Covid-19, Edmontonians (n=166); Albertans (n=472)  
 Q22. Earlier you mentioned you attend fewer arts events than you used to. What are some of the reasons for this?



# Edmontonians indicate they feel slightly less knowledgeable about the arts but otherwise, attitudes do not vary dramatically



Base: Edmontonians (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.



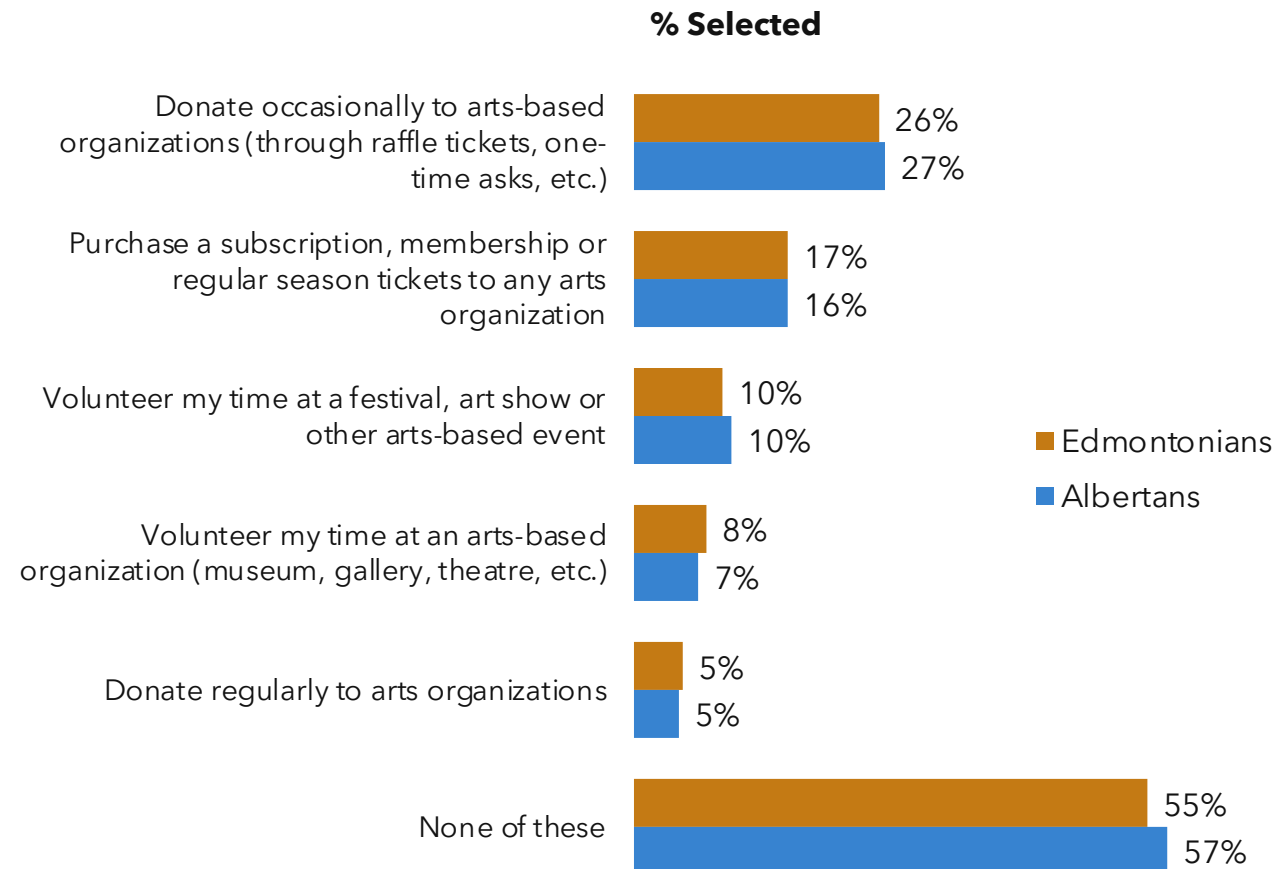
# Understanding Support



# Aside from attendance, how do Edmontonians support arts organizations?

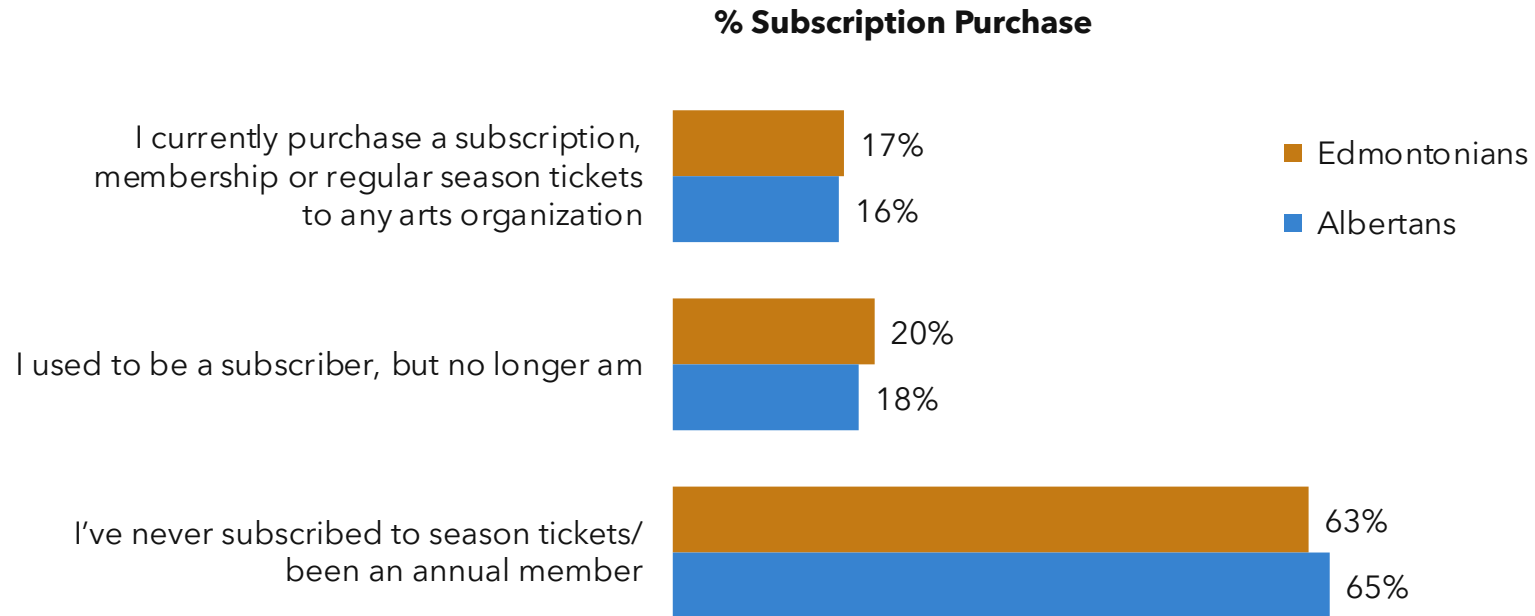


Similar to the rest of the province, just under half (45%) of arts-engaged Edmontonians indicate supporting the arts through time or monetary means.





# Subscriptions levels among Edmontonians have a similar proportion to the rest of Alberta



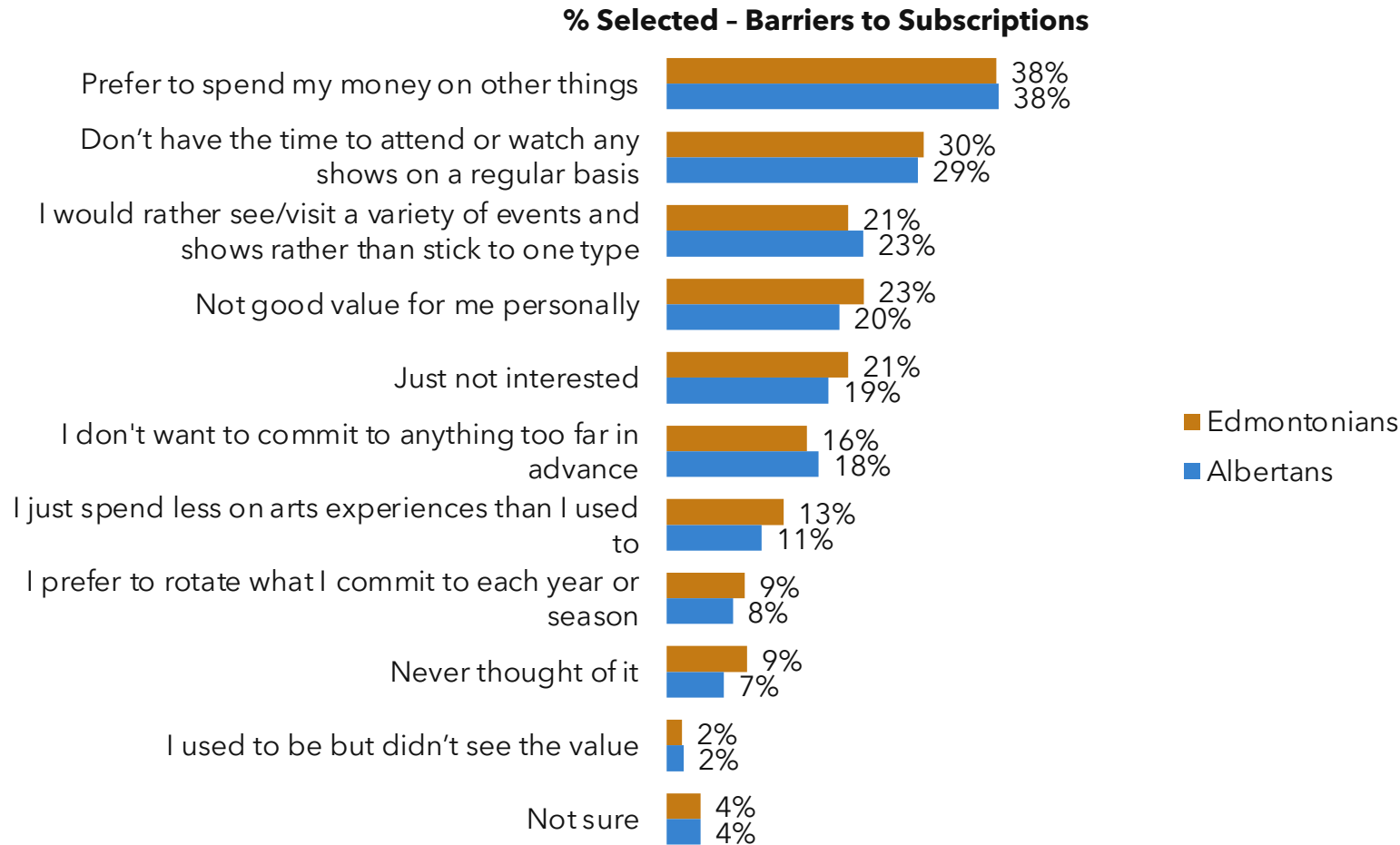
Base: Edmontonians (n=400); Albertans (n=1,160)

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



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

The proportion of Edmontonians 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 those who reside in the southwest or inner city as well as younger Edmontonians.



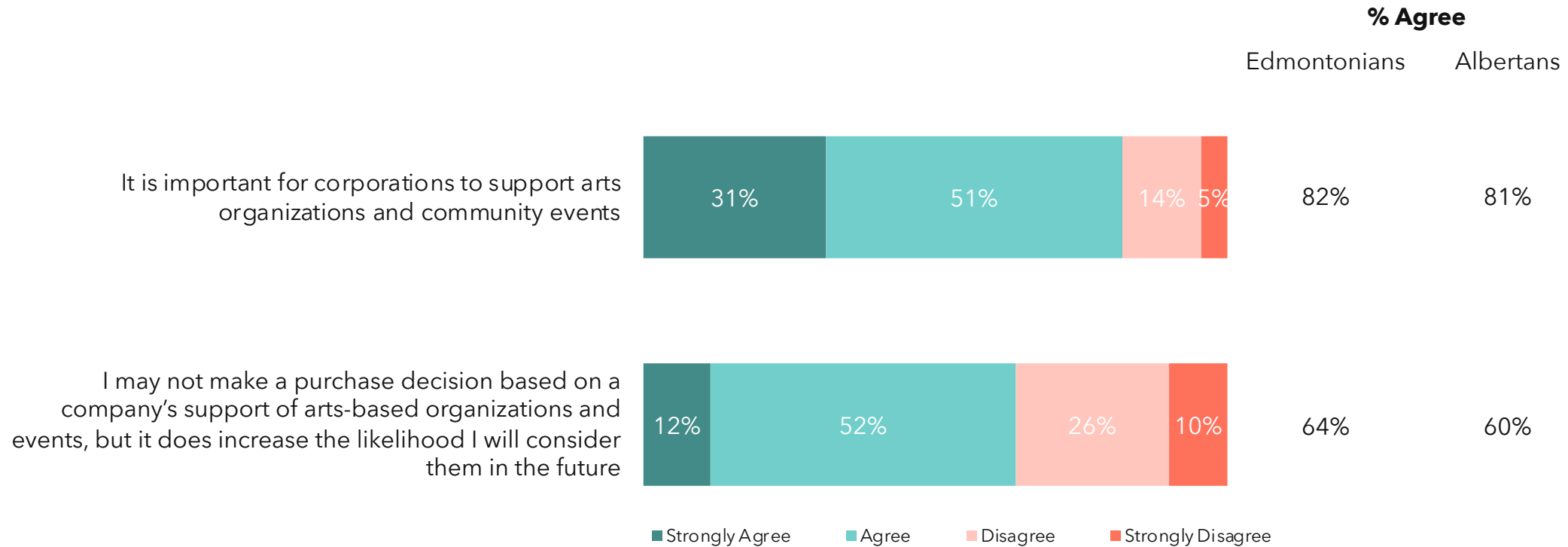
**% Purchased tickets or subscriptions as support  
(for self or others)**





# Edmontonians indicate businesses have a role to play

Edmontonians 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.



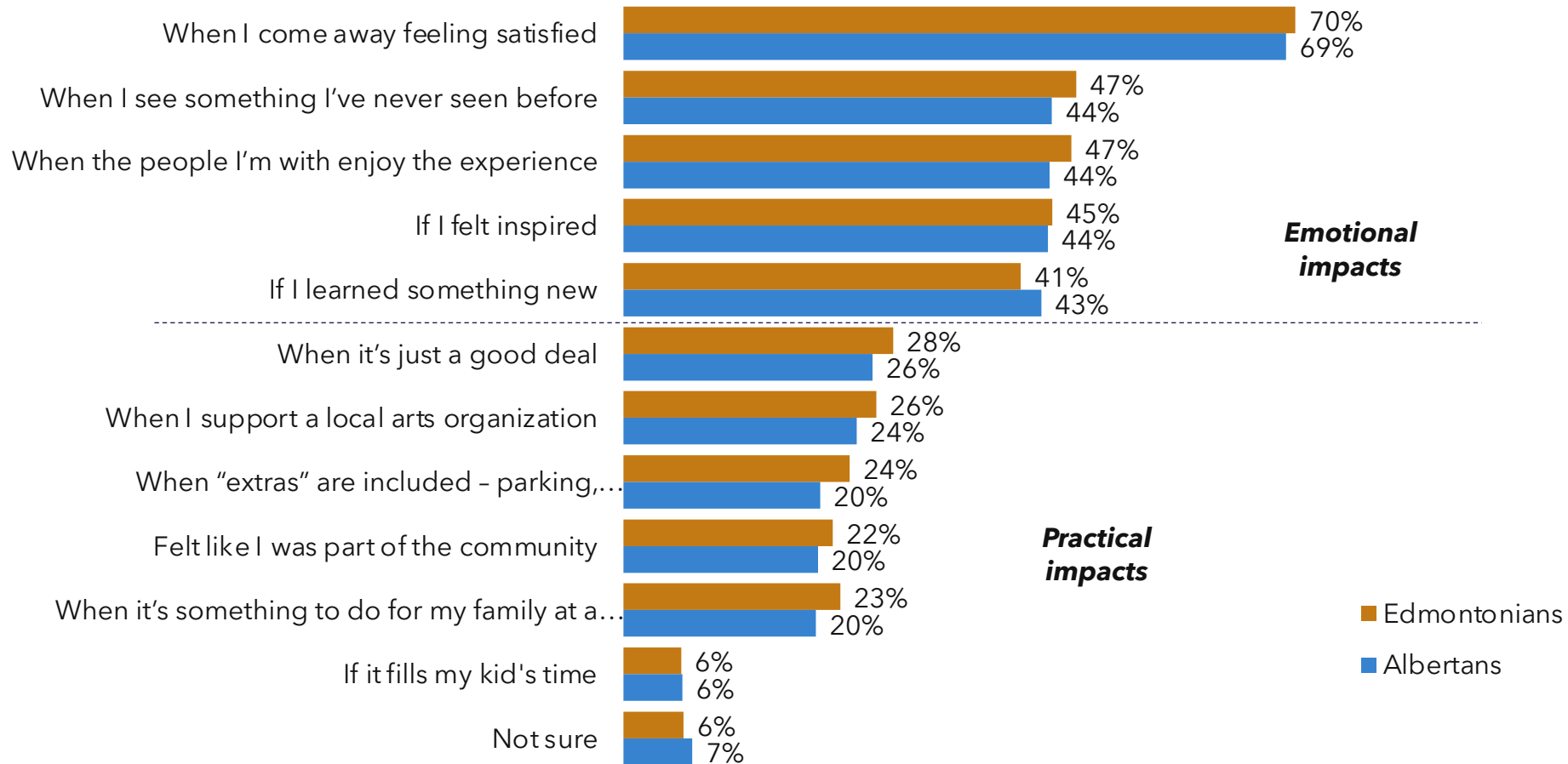
# (Re) defining Experiences



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



**% Selected - When is the arts "money well spent"?**

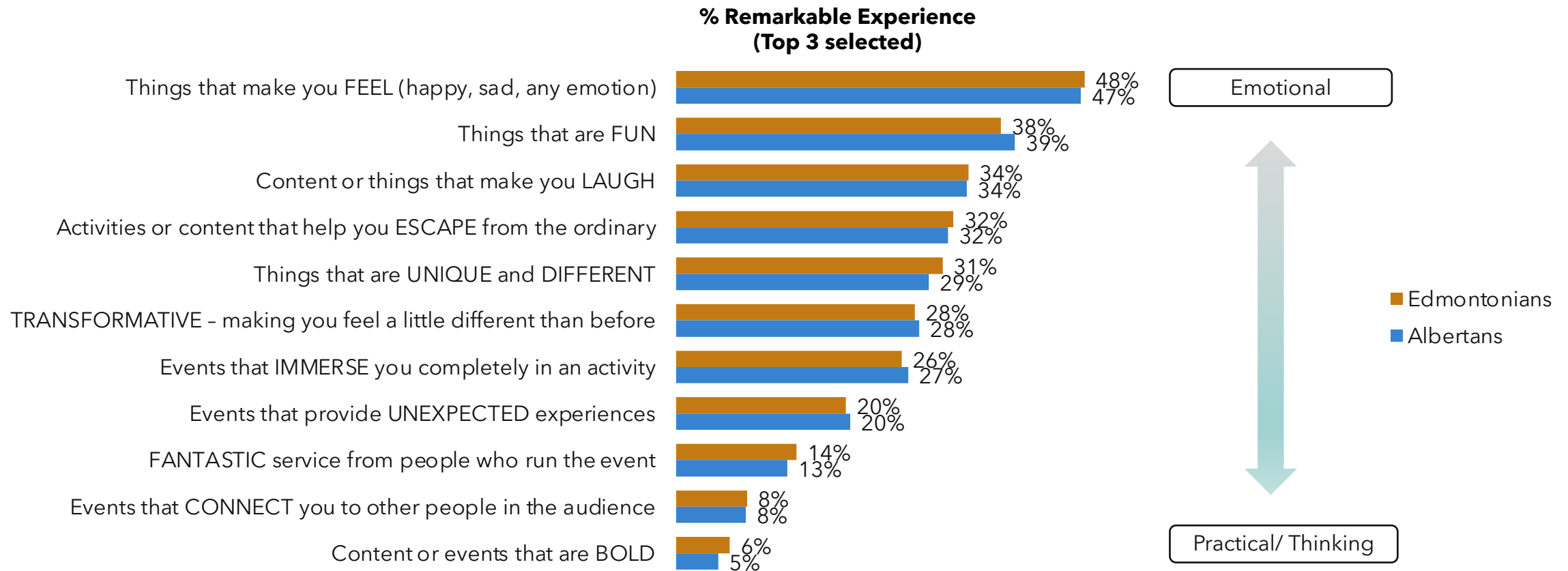


Base: Edmontonians (n=400); Albertans (n=1,160)  
Q23. When you spend money on arts activities or events, how do you know it was worth the money spent?



# Anything “remarkable” has an emotional component

Edmontonians only slightly differ from Albertans when it comes to describing a remarkable experience. They are slightly more likely to unique and different experiences.



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

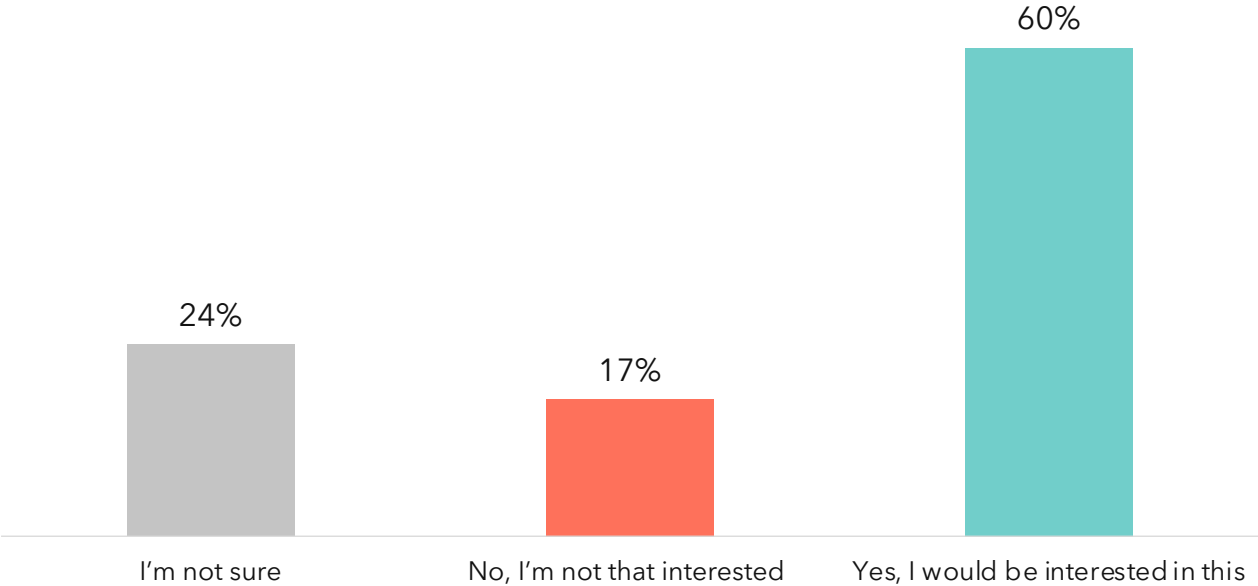
Q24. Below are a series of words and statements that could be used to describe remarkable experiences people may have when engaging with arts and culture experiences. Thinking about your own experiences and expectations, which words or phrases best describe what makes a REMARKABLE experience for you? 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

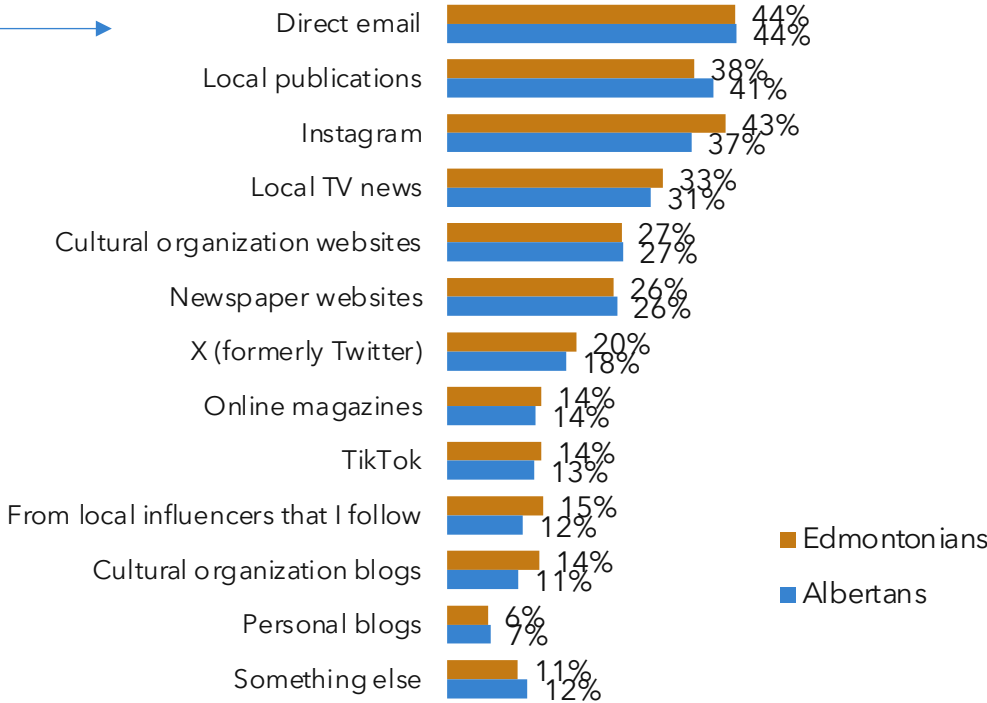
The desire for most Edmontonian audiences is to use digital sources for information due to the ease and accessibility. The challenge of breaking through with new offerings is similar across Albertan audiences because these opt-in sources are options that audiences have already indicated an interest or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



**% Interest - Broad-based experience and events listing**



**% Selected - preferred sources**



Base: Edmontonians (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; Edmontonians (n=333); 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.

# Respondent Profile

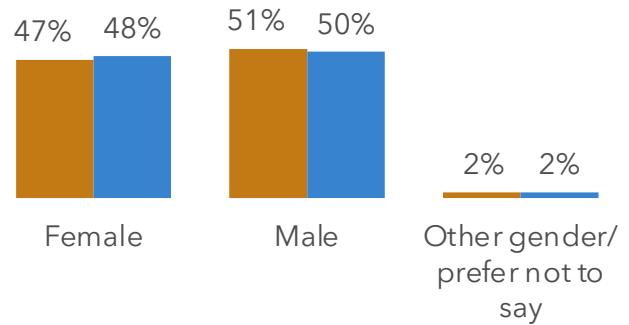


# Respondent Profile: Who We Heard From

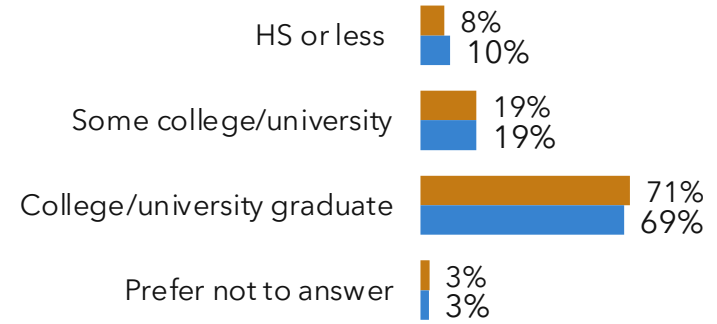
Edmontonians  
Albertans



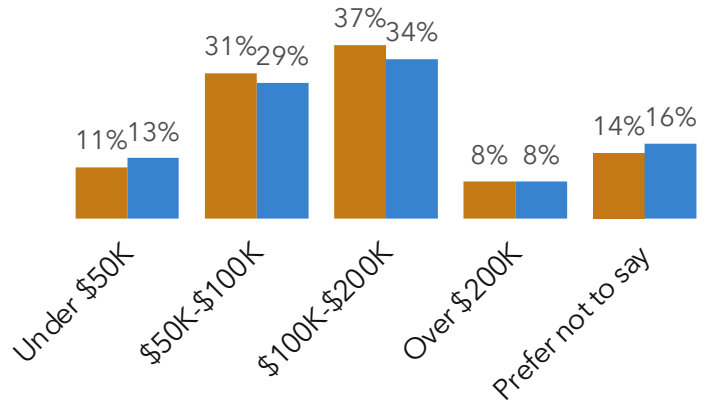
## Gender



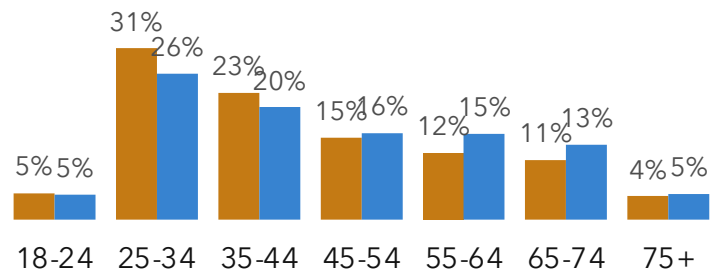
## Education



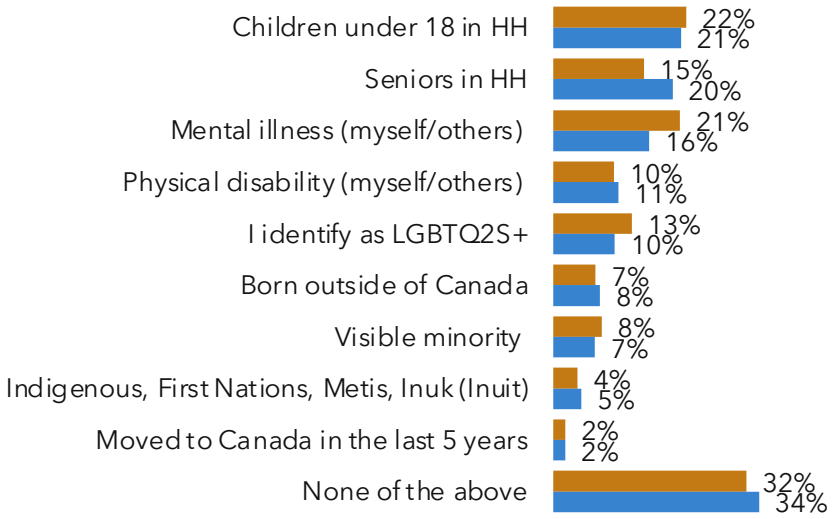
## HH Income



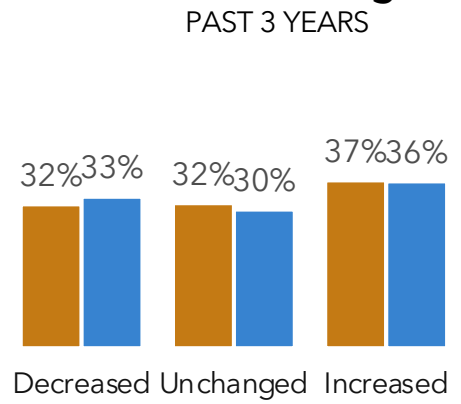
## Age



## Diversity/Identity



## Income Change



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

**Understanding people.**

It's what we do.

**Stone —  
Olafson**

**Questions or Comments?**

Please contact [kim@stone-olafson.com](mailto:kim@stone-olafson.com)

[megan@stone-olafson.com](mailto:megan@stone-olafson.com)