

# Spotlight on Arts Audiences

Wave 1 Results: Regional Alberta  
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:

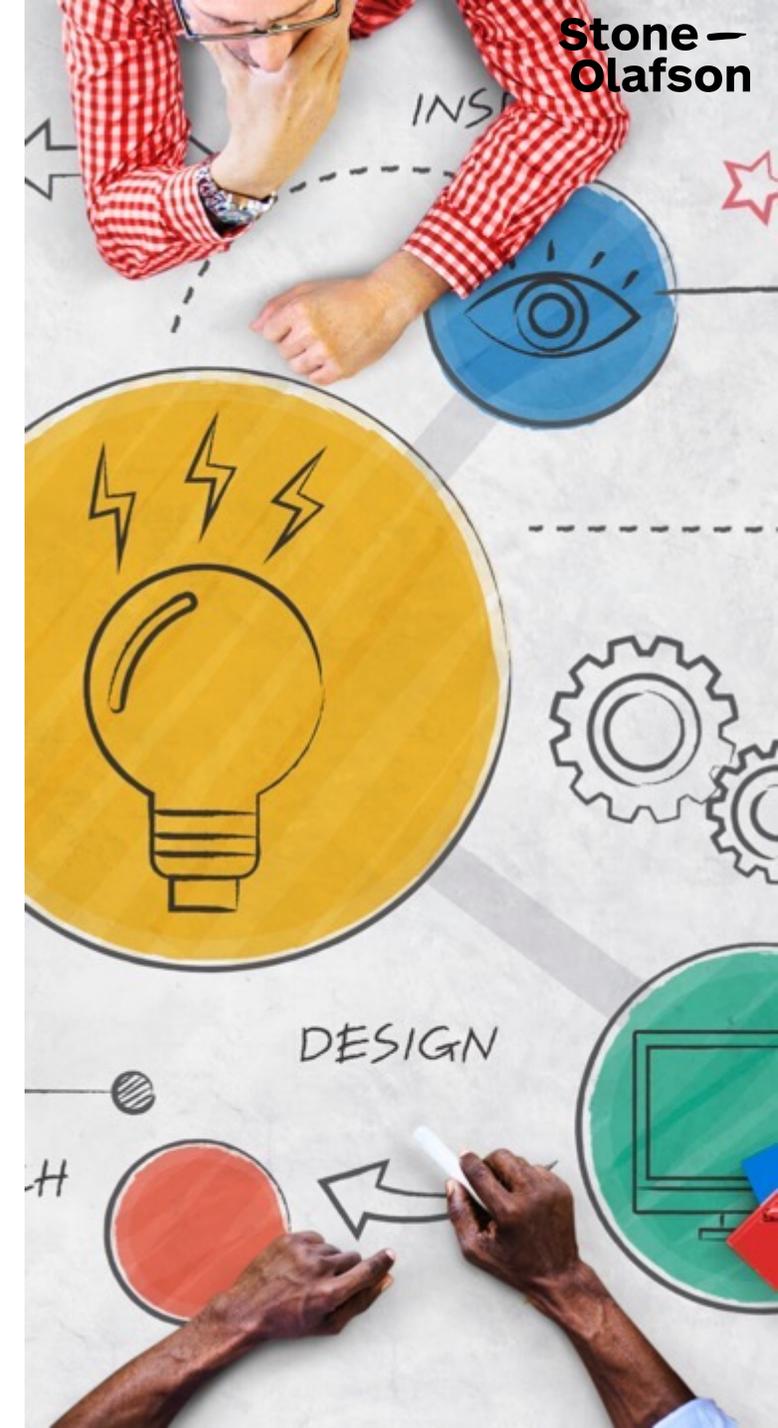
Alberta continues to be at a crossroads brought on by a pandemic that has changed public life and re-shaped our economy. This is especially true in the arts sector which continues to experience a decline in engagement with events and activities. This work was developed for this sector exclusively. It 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 Northern, Central, and Southern Alberta regions only. Results are shown alongside total results to provide a directional comparison to other areas of the province.***

***For the purpose of this report only, the collective group will be referred to as Regional AB (to separate from Calgary and Edmonton).***



The image features three dark silhouettes of people against a light, vertically-pleated background that resembles curtains. 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 is walking towards the viewer, carrying a long, thin object, possibly a cane or a walking stick, over their shoulder.

# Key Findings and Implications

# What is the story with Regional Albertans?

## Slightly less engaged

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The vast majority of Albertans are engaged with arts and the same is true for residents in the North/Central/South regions. However, the level of engagement is slightly softer overall, which may be partly a reflection of arts offerings in certain locations.

This is supported by slightly lower levels of attendance. However, this is not to say this is a disengaged audience in any way. Rather, the intensity of engagement is just slightly lower than in major cities.

## Time constraints still a barrier

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Like the rest of the province, most Albertans in North, South, and Central regions would like to attend more frequently, but simply do not have the time (56% among Regional residents and 61% among Albertans). This is slightly more muted than the rest of the province (particularly in the North region) but still a notable proportion.

Also unique to regional residents is a stronger preference to stay close to home/neighbours. This is a barrier for engagement that is more pronounced in these regions, so focusing on convenience and ease may play a bigger role outside of Edmonton and Calgary.

## Perceptions on par with the rest of the province

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While the intensity of attitudes towards the arts is softer in regional areas of the province, perceptions are still on par with the rest of the province. A full 77% agree that the arts offer something unique and 73% agree that arts make lives richer.

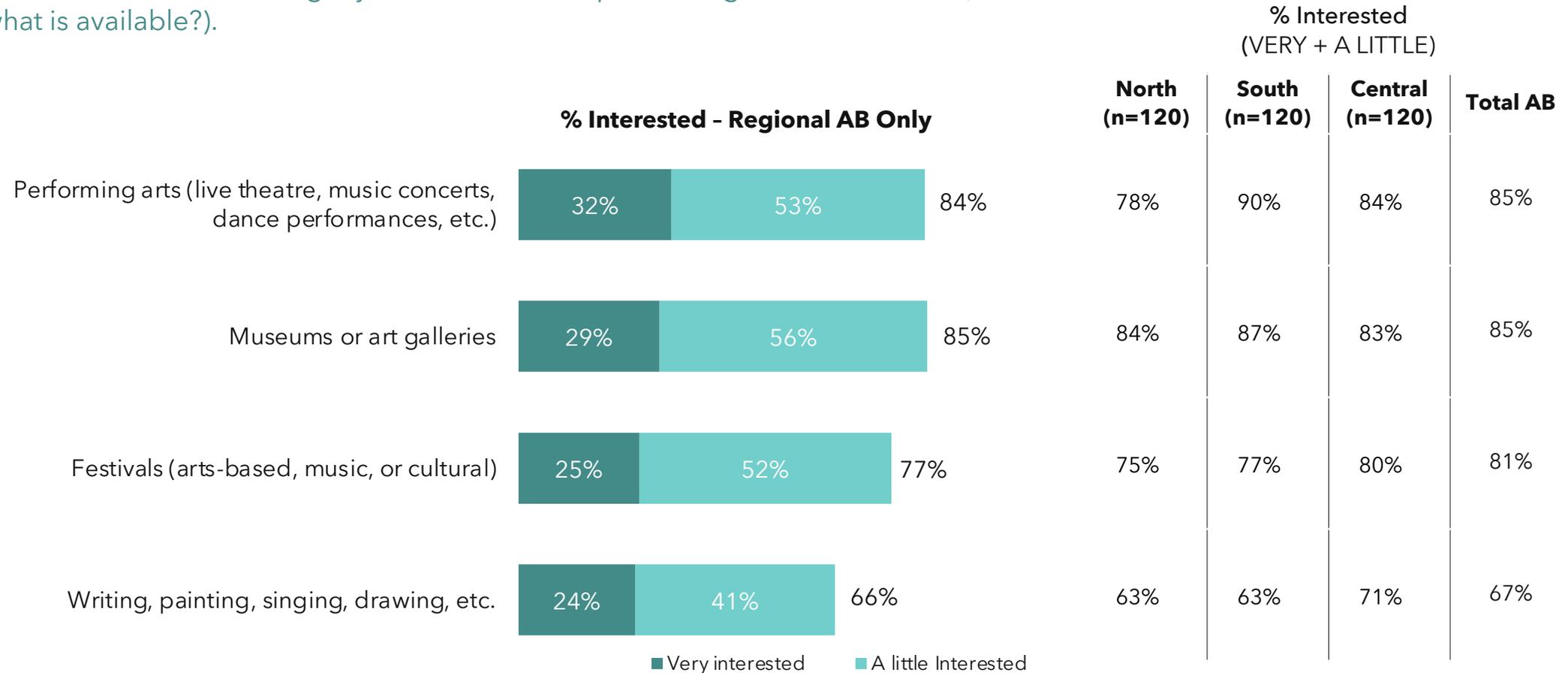
And while emotional benefits of the arts are still a key component of creating remarkable experiences, some regions (Central in particular), place a slightly higher priority on practical benefits (service, perks, etc.)

An abstract graphic consisting of several overlapping, semi-transparent, rounded shapes in shades of gray. The shapes are layered, creating a sense of depth and movement. One large shape is in the foreground, partially obscuring others behind it. The overall composition is dynamic and modern.

# Profiling Regional Albertans based on their engagement with the arts

# Overall, regional residents reflect the rest of the province with their interest level in the arts.

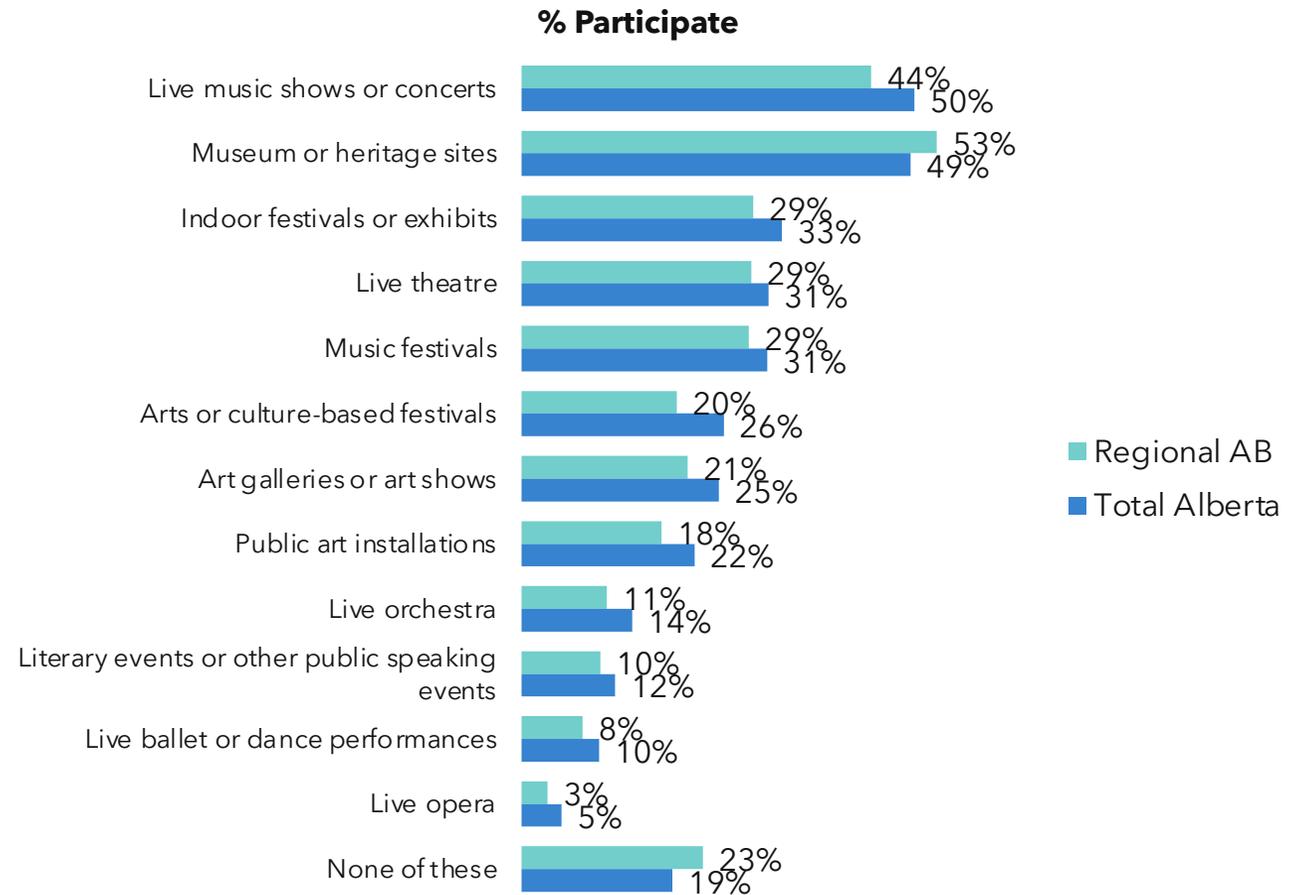
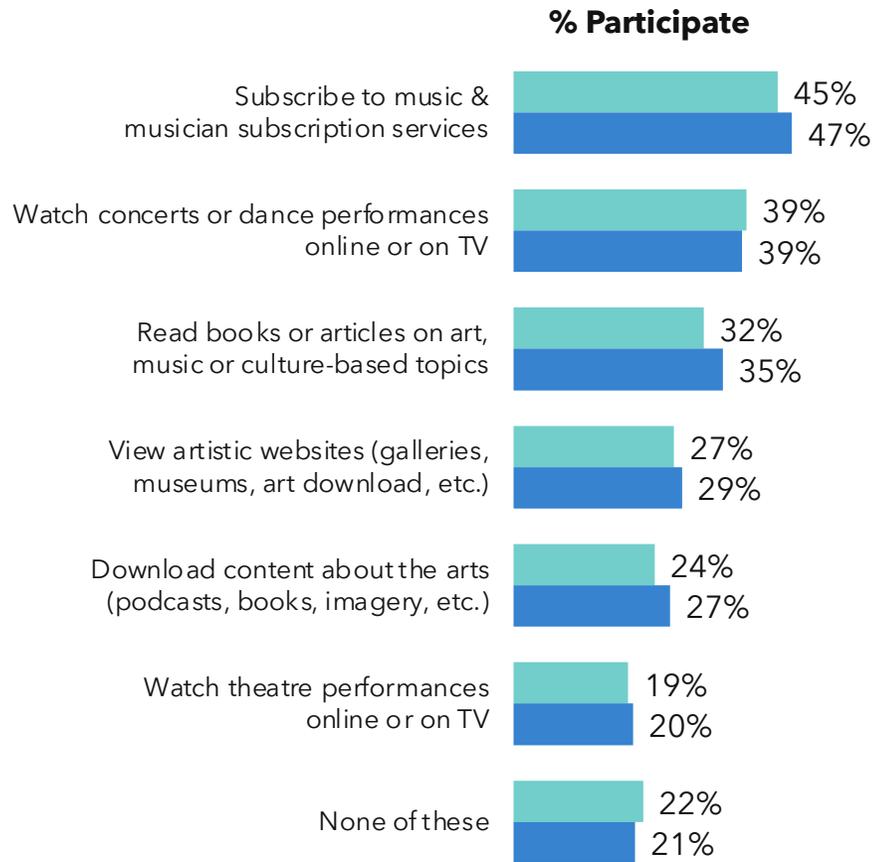
Northern Albertans are slightly less interested in performing arts and festivals (does this reflect what is available?).





# Regional Engagement (Observation and Attendance)

Regional Albertans observe at very similar levels to the rest of the province, but they attend fewer activities and events. However, Southern Albertans are visiting museums or heritage sites more than all other Albertans.



Base: Regional Albertans (n=360); Albertans (n=1,160)

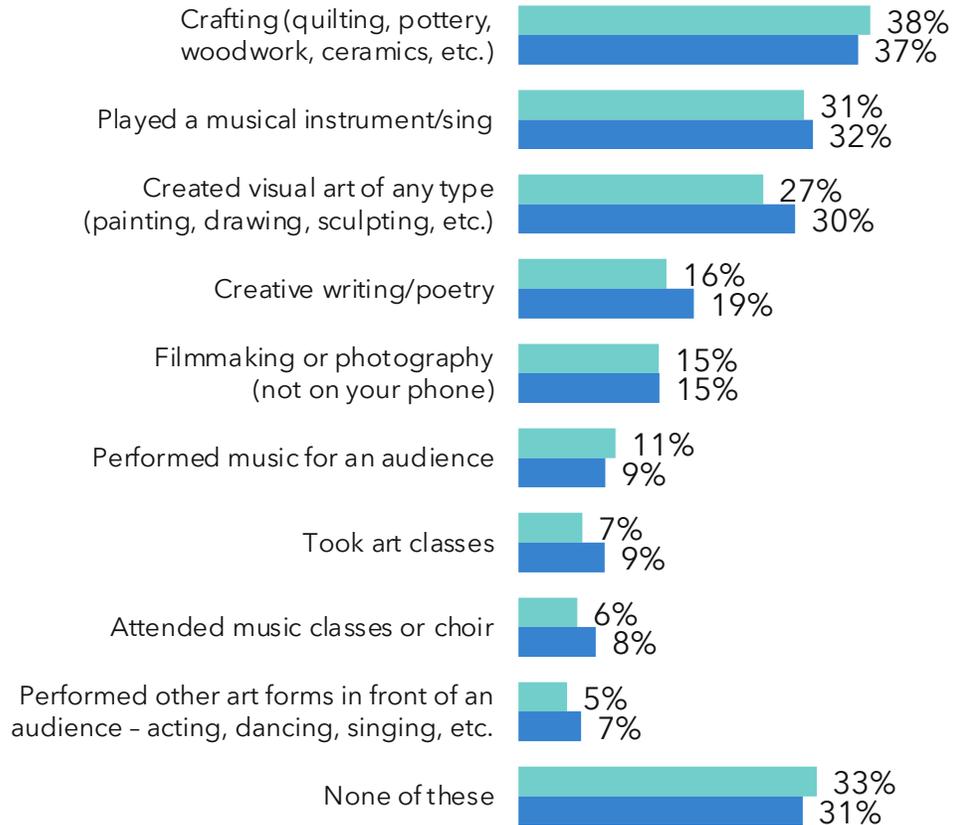
Q10. Which of the following activities do you participate in on a regular basis? Q9. Which of the following arts activities or events do you attend or visit on a regular basis?



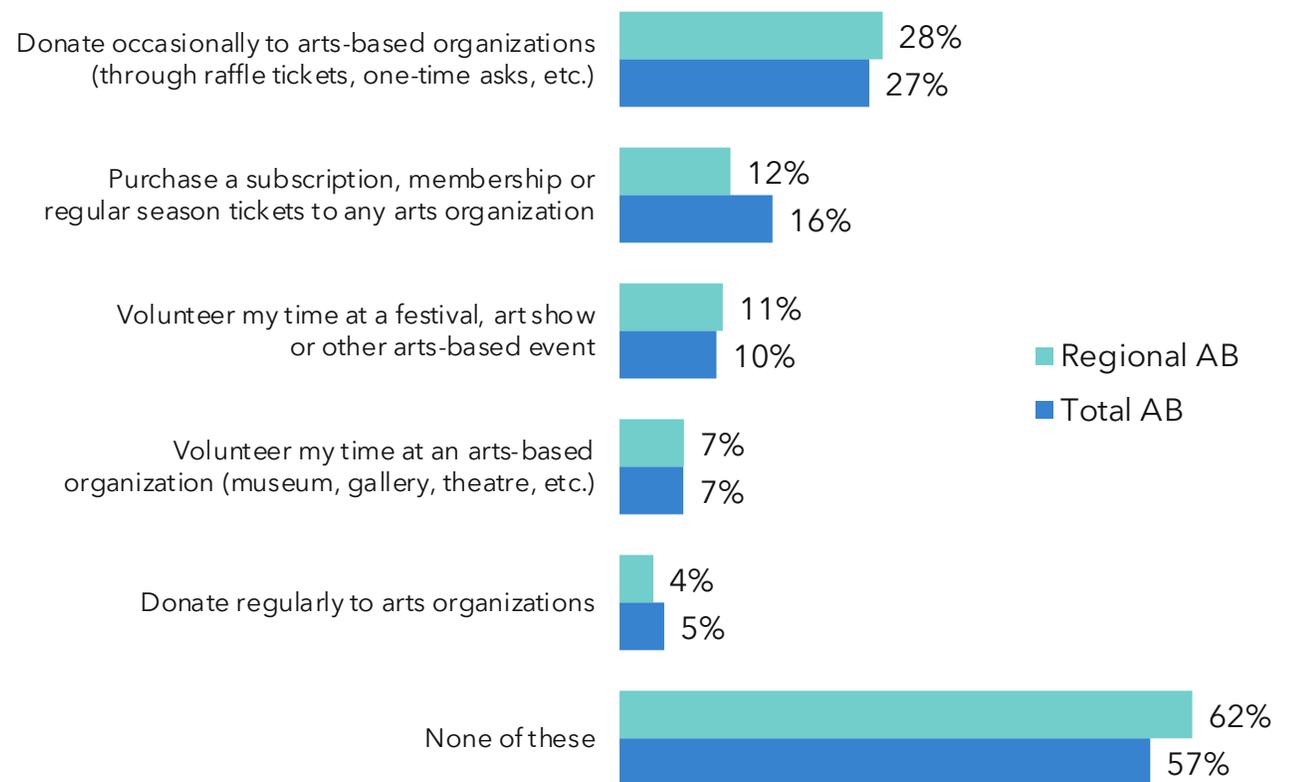
# Regional Engagement (Creation and Support)

Central Albertans create more than those in other regional areas. Levels of support by donating or volunteering show little difference compared to the rest of the province, but committing to a subscription of membership is less frequent.

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



**% Selected (Support)**



Regional AB  
Total AB

Base: Regional Albertans (n=360); 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 Regional Alberta

Nearly all (94%) of Regional 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.



2.4 activities on average



### ATTEND

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



3.6 activities on average



### CREATE

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



2.3 activities on average



### SUPPORT

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



1.6 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

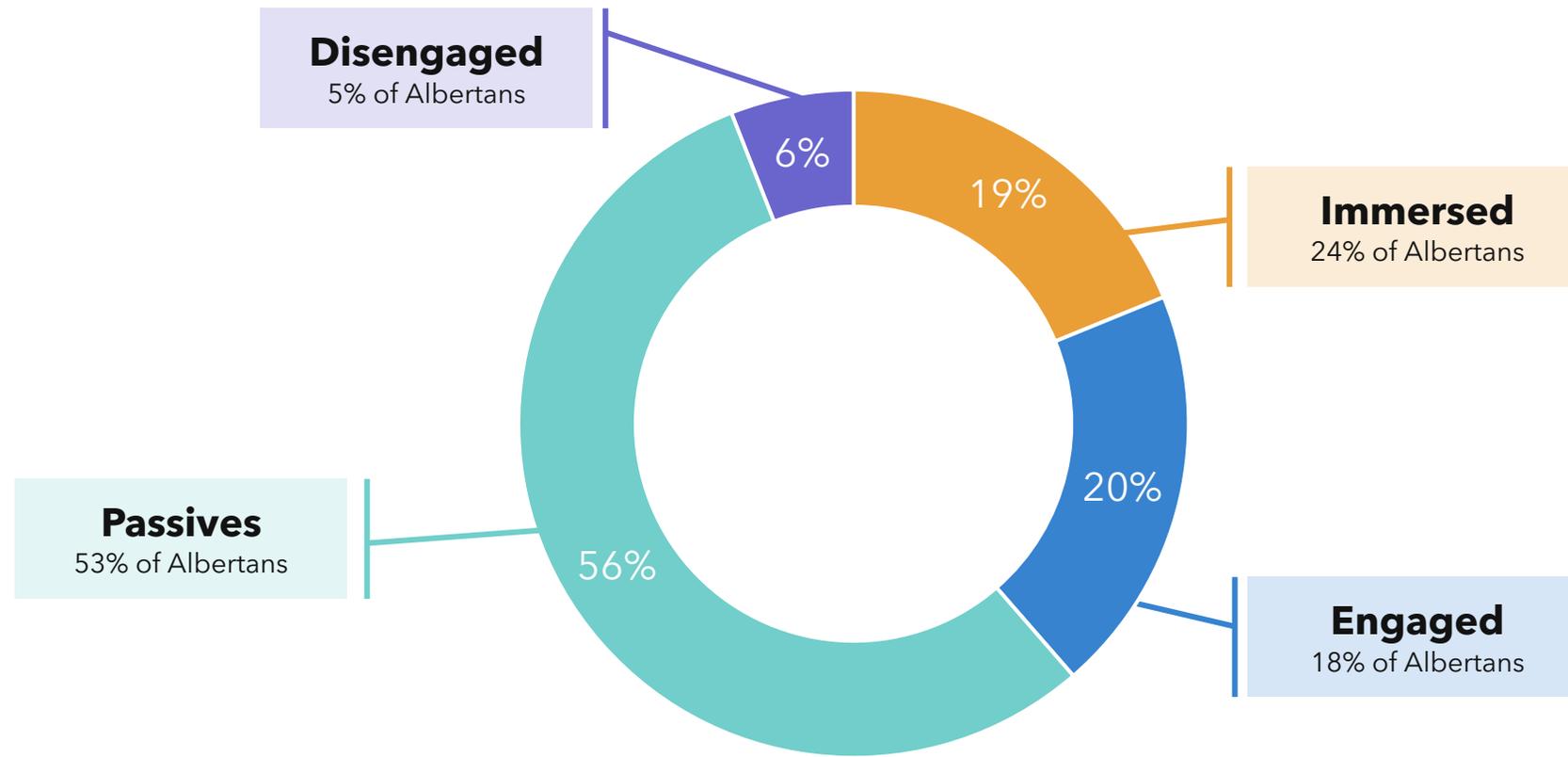
These are people who frequently engage in arts in only **one category** (so less engagement than the average person).

## Disengaged

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

# Compared to major urban centres, Albertans in other regions show slightly less engagement overall.

While the difference is not stark, the proportion of Albertans outside Edmonton and Calgary show slightly lower levels of being “immersed” in the arts.

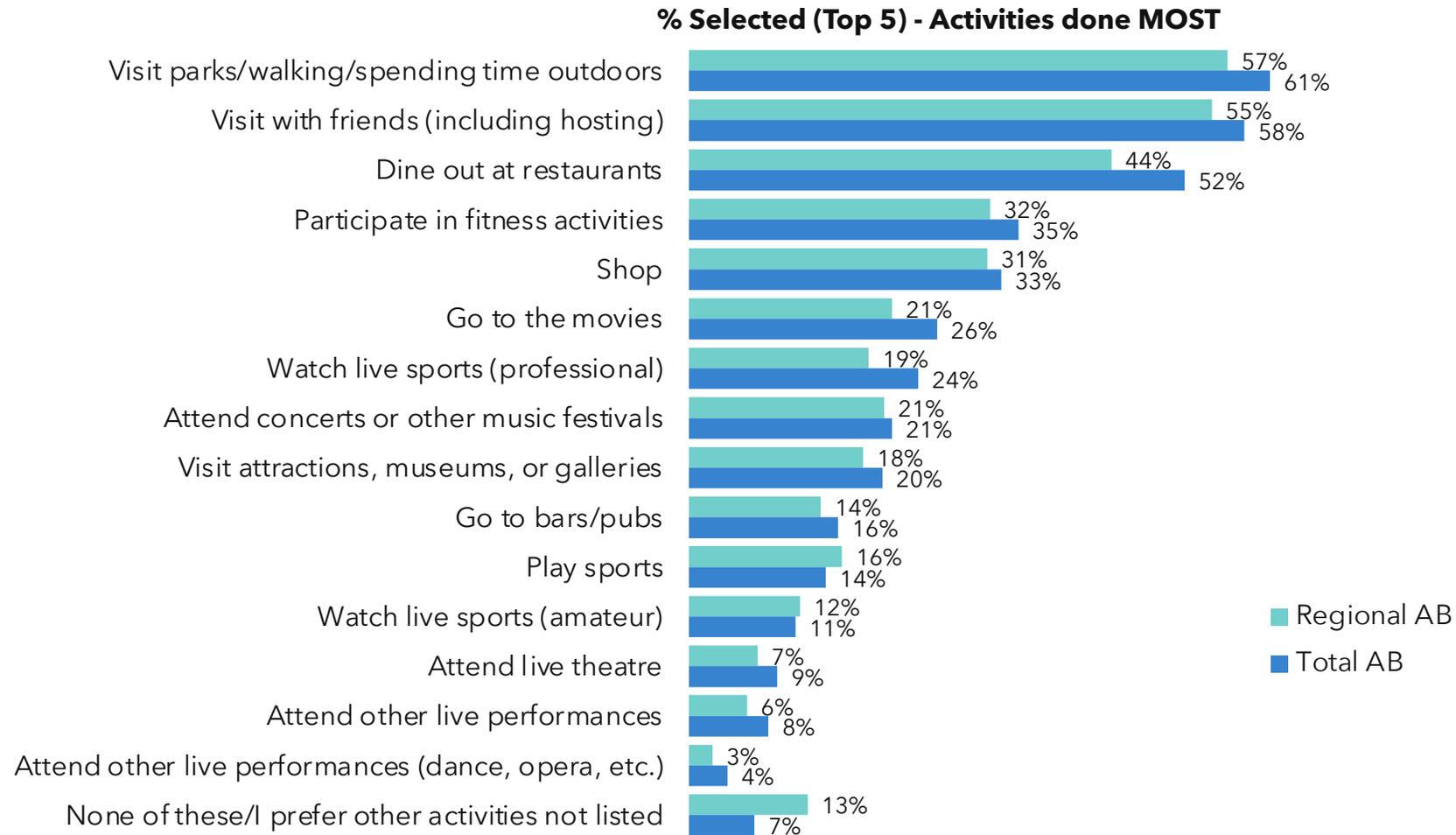


# Audience Habits & Patterns

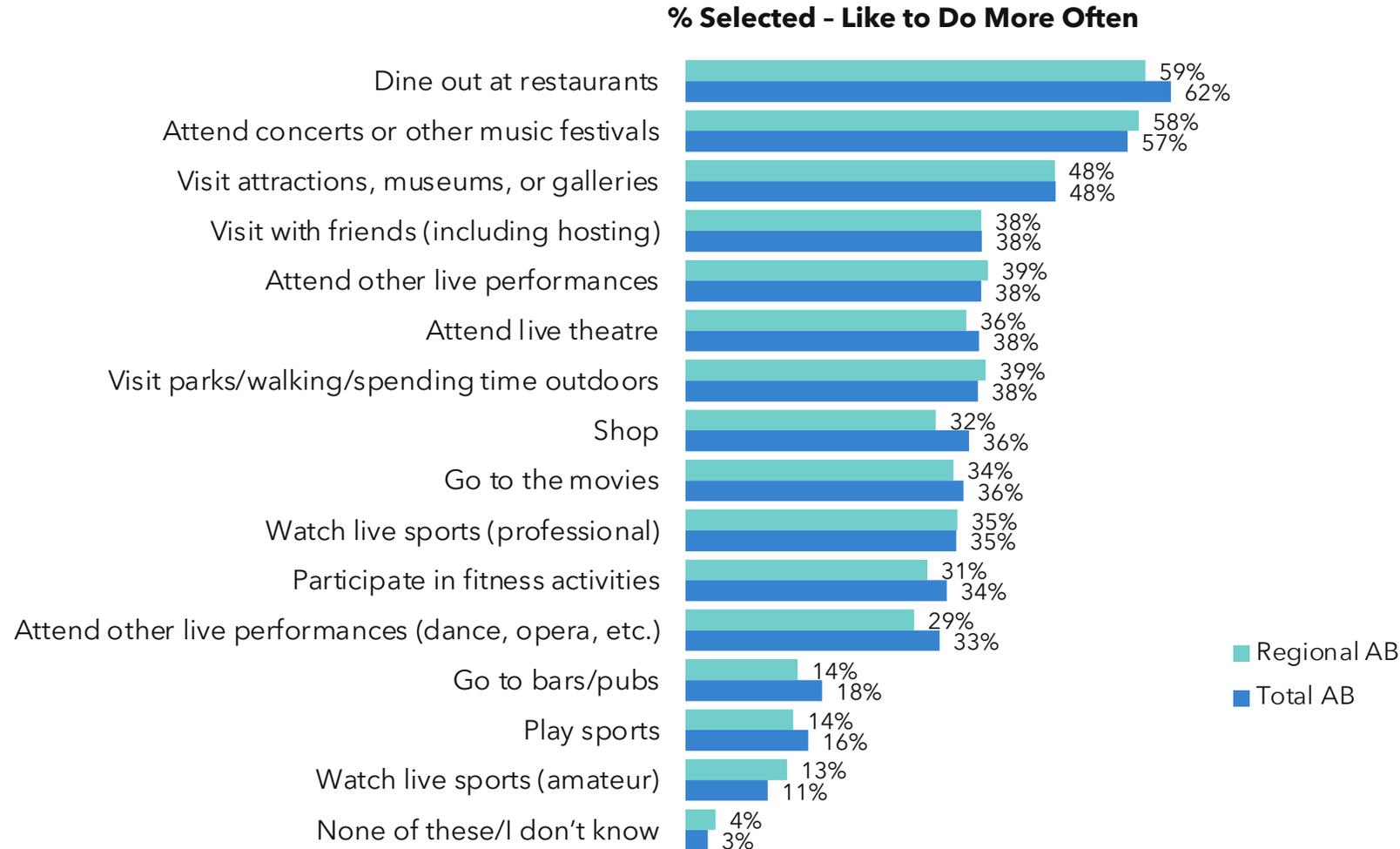


# What are arts-engaged regional Albertans doing today?

In terms of recreational activities, residents in regional Alberta tend to participate at slightly lower rates than the province as a whole.



# But increasing participation in the arts is what most are looking to do (as is the case across the entire province).

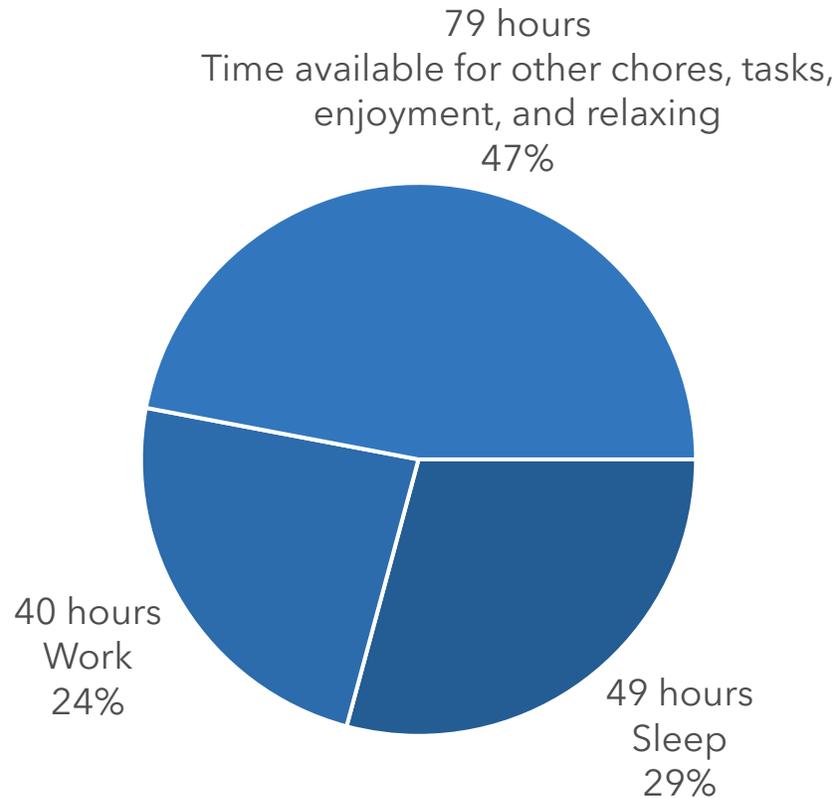


# Understanding Albertan's time

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...



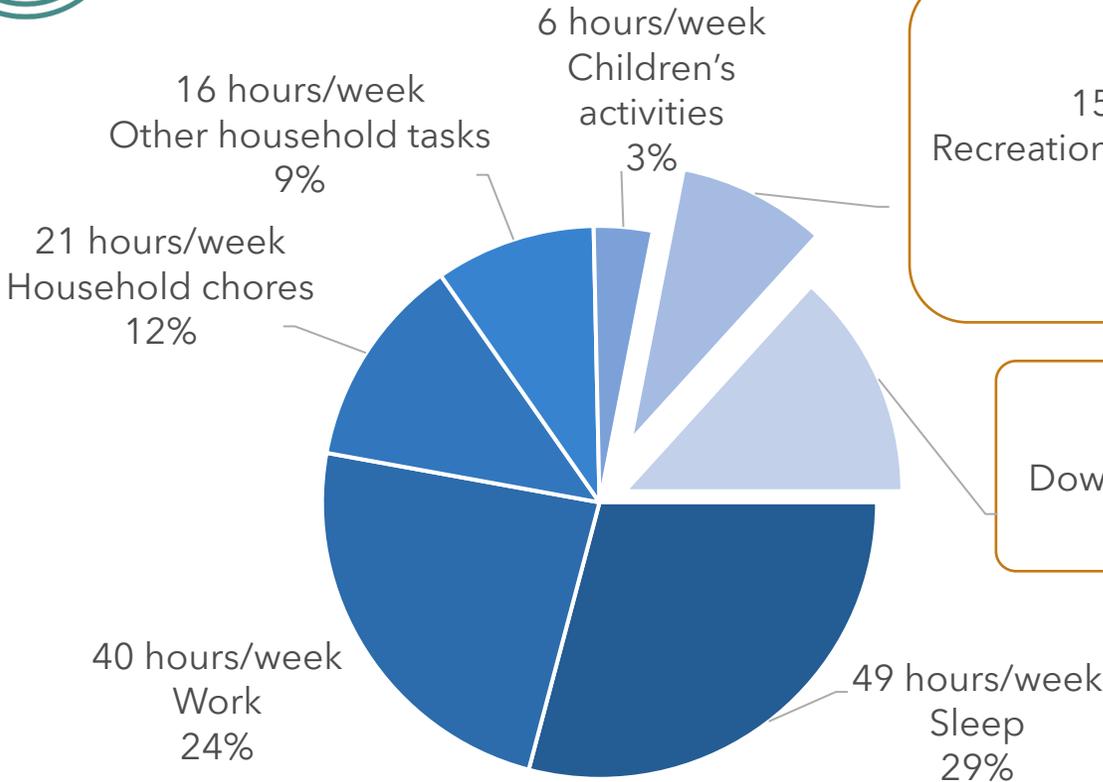
**What do they do during the available hours each week...**

# All 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 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...



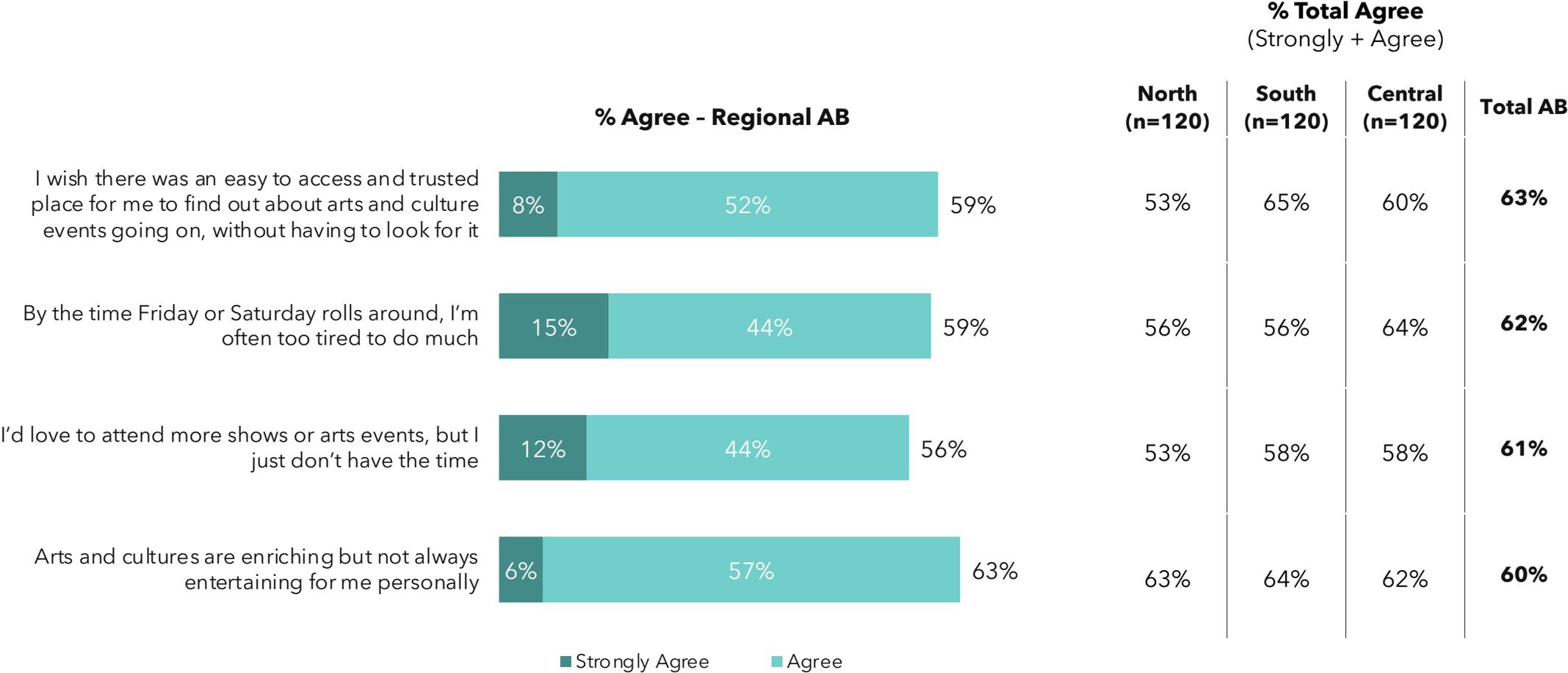
Organizations are **competing for just 15 hours** of Albertan's time (**13 hours for Northern AB and Central AB residents, while Southern AB residents identify having 15 hours**). Those with greater engagement with the arts identify more time allotted to rec and hobbies.

**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: Regional Albertans (n=360); 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%)

# Regional Albertans indicate slightly lower levels of desire to attend more arts events than the rest of the province.

By region, Northern AB residents may have slightly less interest in a curated arts and culture information source.



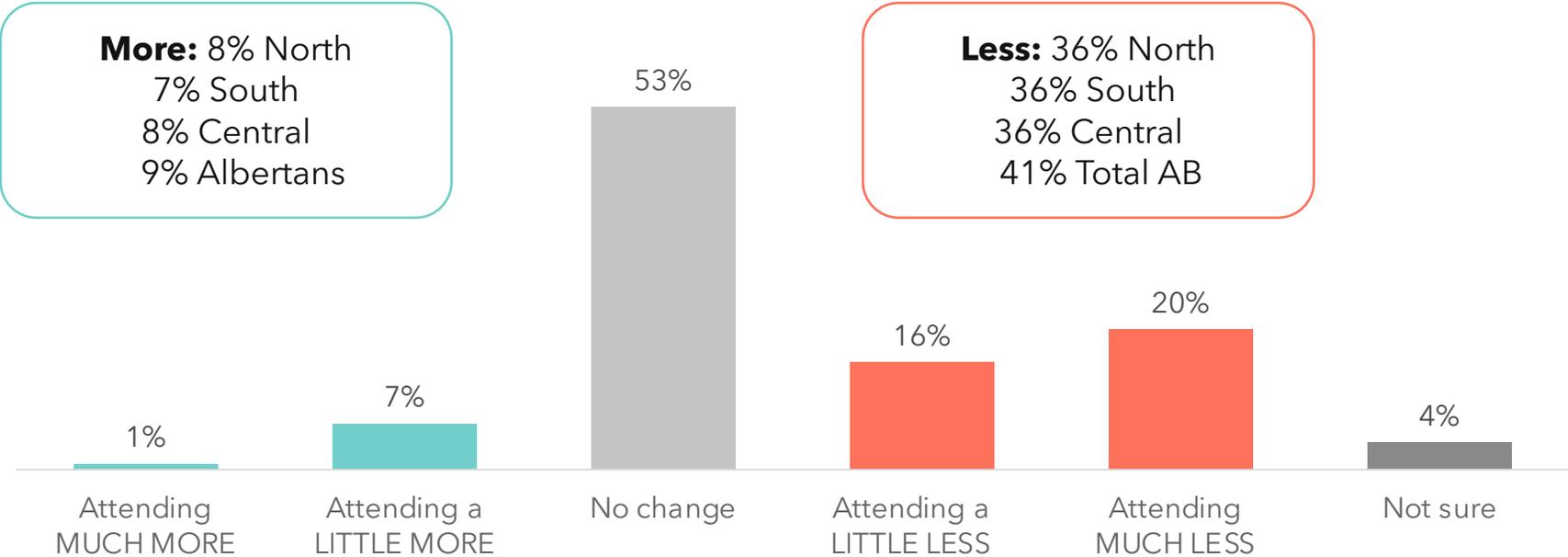
Base: Regional Albertans (n=360); Albertans (n=1,160)  
Q21. Here are some additional statements that some people might make about how they use their time. Please indicate your level of agreement with each of the following.



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

# Post-COVID, regional Albertans are attending events less often, as with the rest of the province.

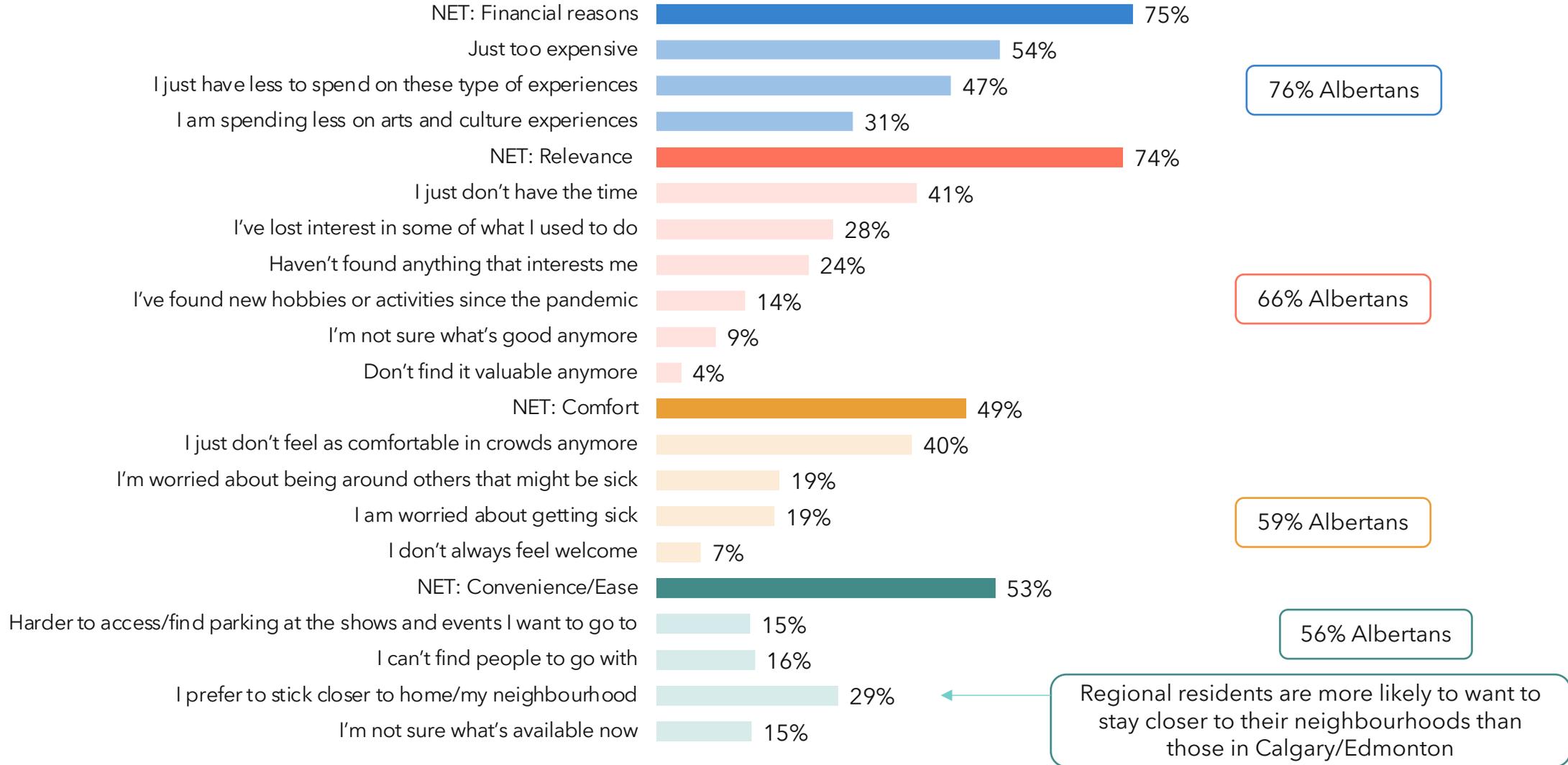
## Arts and Culture Event Attendance - Post-COVID-19



Base: Regional Albertans (n=360) 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 regional audiences from attending?

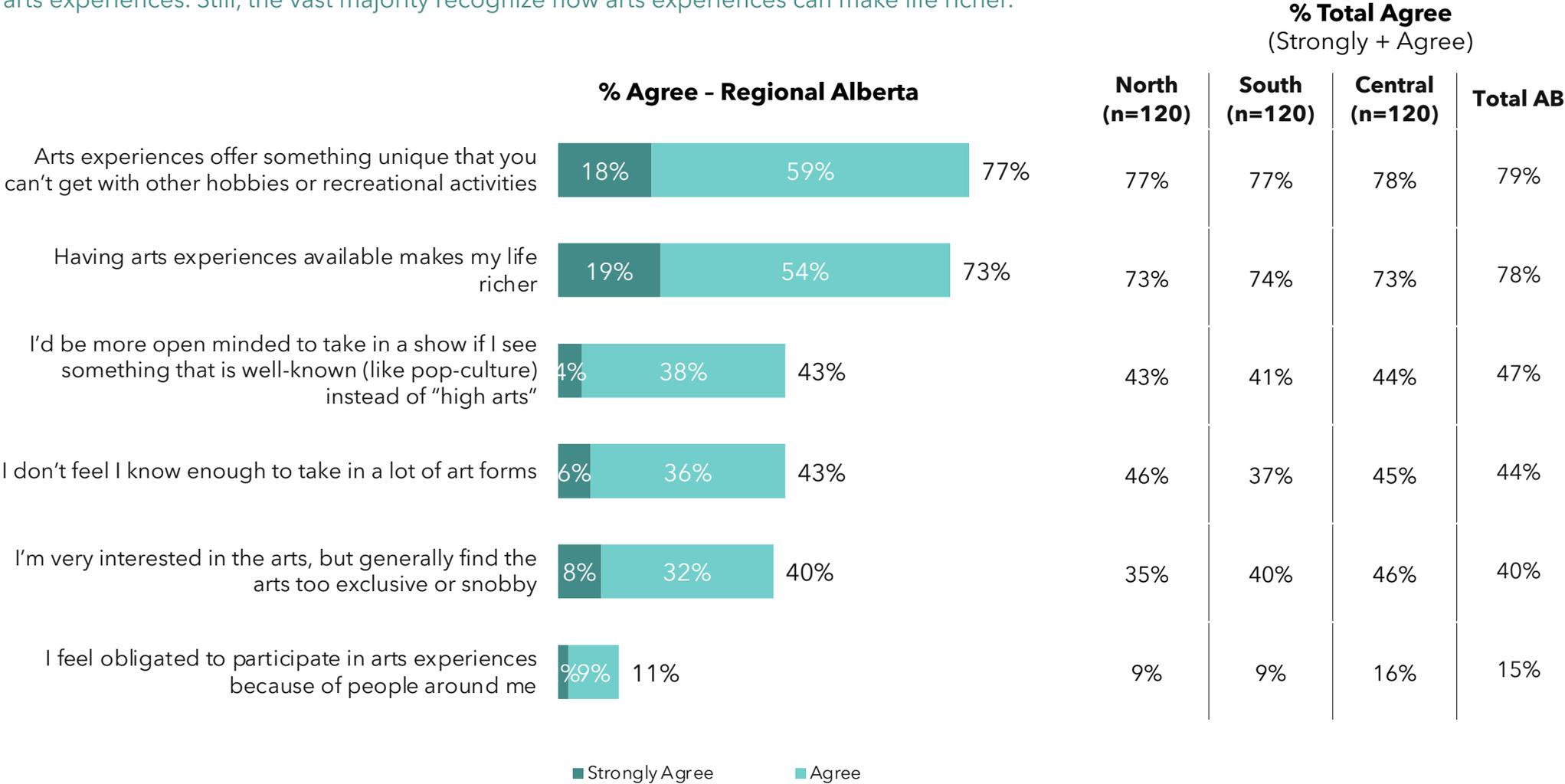
## % Selected - Reasons for attending less



Base: Attend fewer arts events since Covid-19, Regional Albertans (n=129); Albertans (n=472)  
Q22. Earlier you mentioned you attend fewer arts events than you used to. What are some of the reasons for this?

# Regional Albertans demonstrate slightly less intense attitudes towards perceptions of the arts.

Overall, audiences in regions outside Edmonton and Calgary are less likely to feel obligated to participate in arts experiences. Still, the vast majority recognize how arts experiences can make life richer.



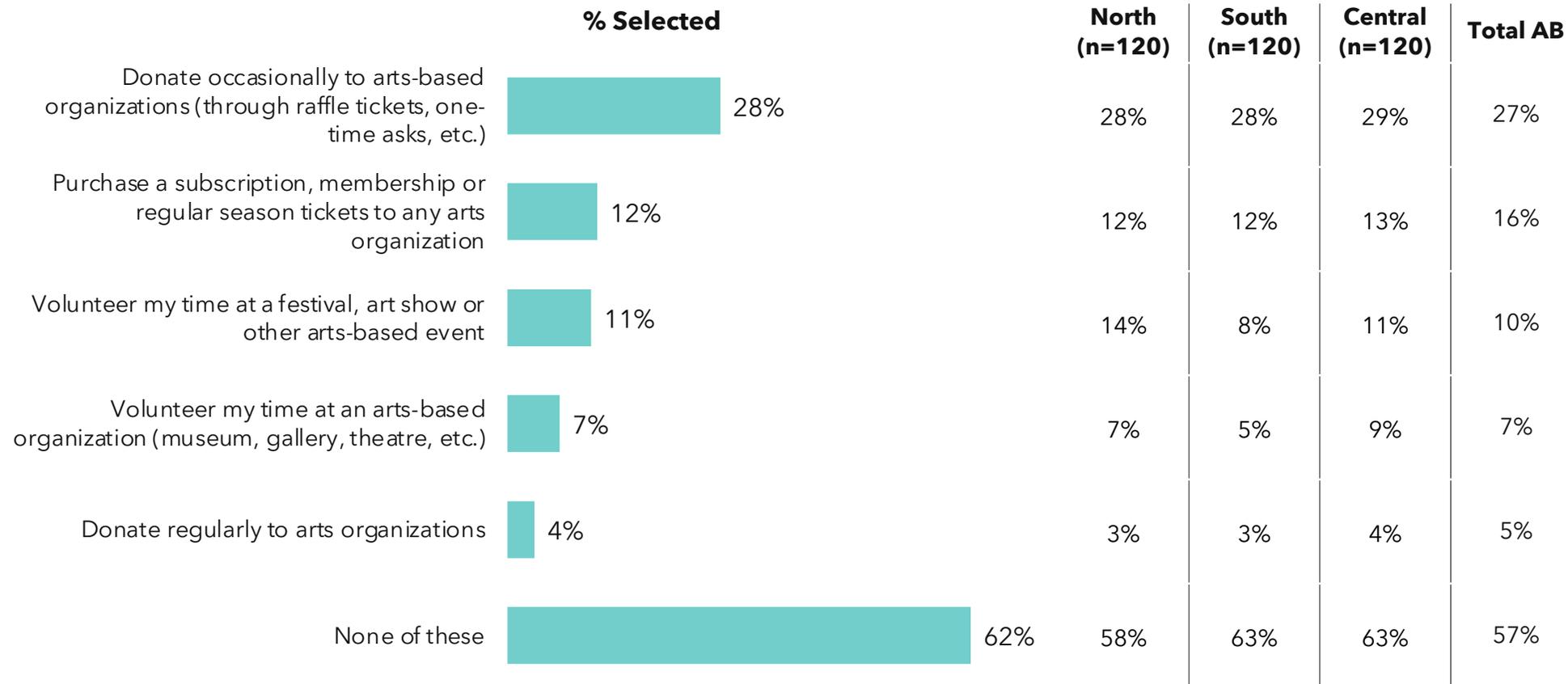
Base: Regional Albertans (n=360) Albertans (n=1,160)  
Q20. Here are some statements that some people make about the arts. Please indicate your level of agreement with each of the following.

# Understanding Support



# Aside from attendance, how do regional Albertans support arts organizations?

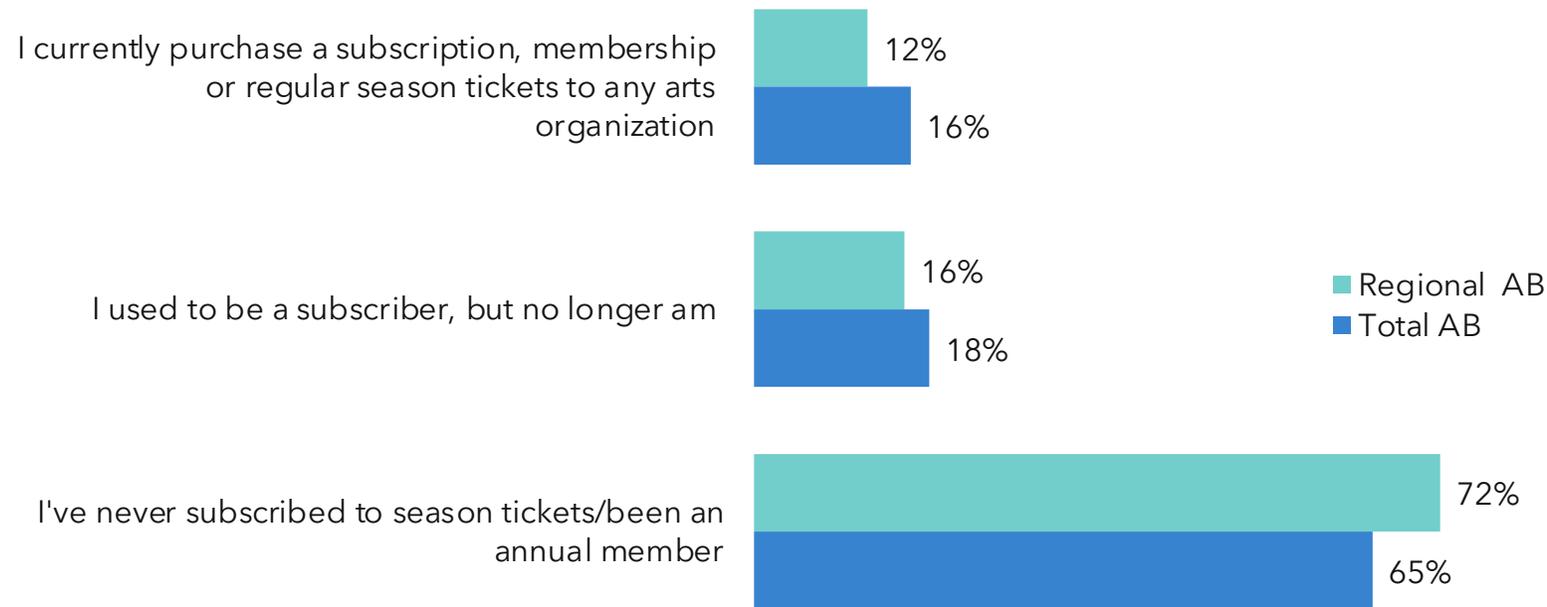
Donation and support behaviours are very similar to the rest of the province, but Northern Albertans tend to volunteer at higher rates other regions.



Base: Regional AB (n=360); Albertans (n=1,160)  
Q12. And, do you do any of the following to engage with arts and culture organizations?

# Subscriptions levels are slightly softer among regional residents than other areas of the province, but not by a large margin.

**% Subscription Purchase**



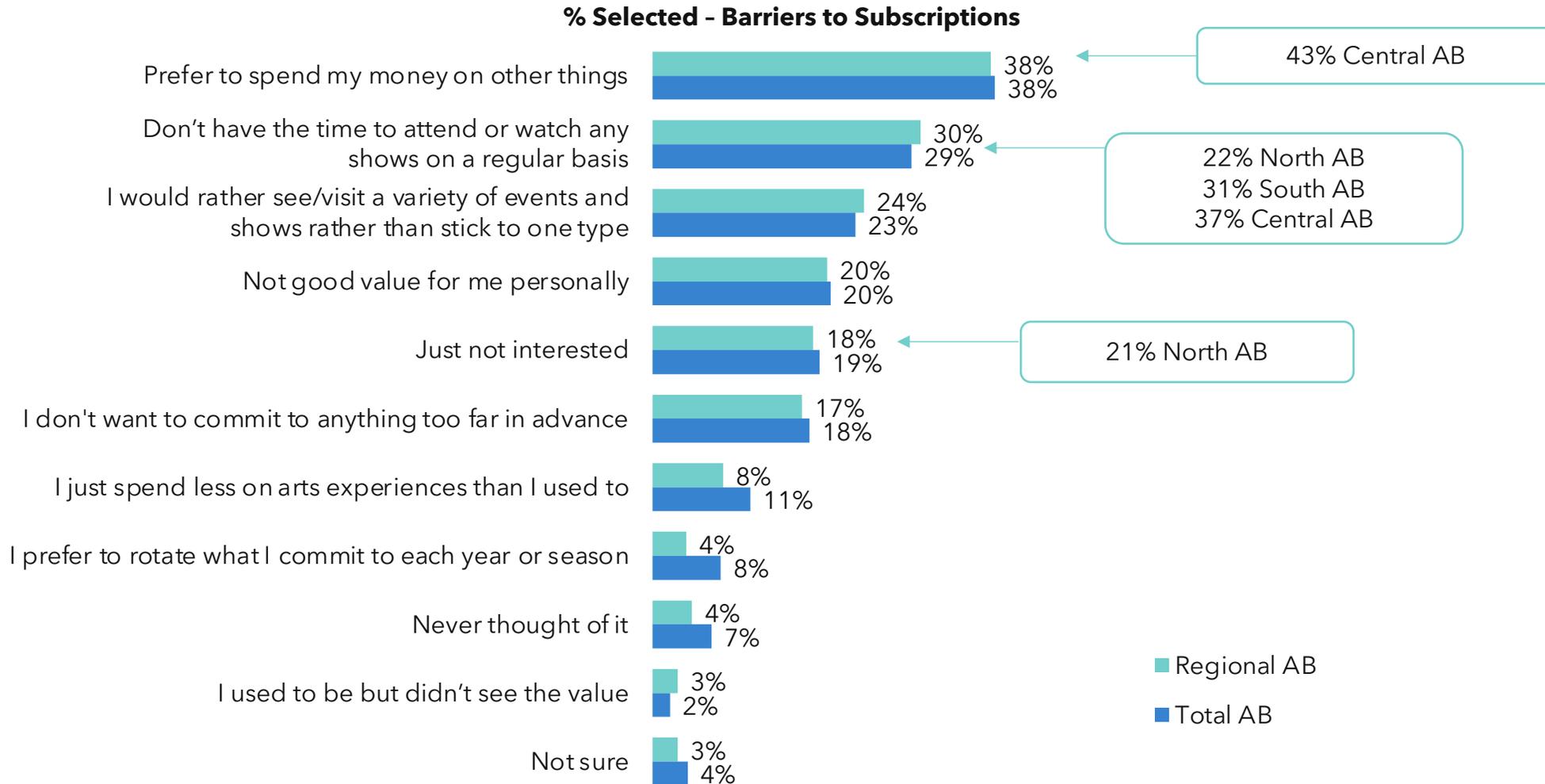
Base: Regional Albertans (n=360); Albertans (n=1,160)

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?

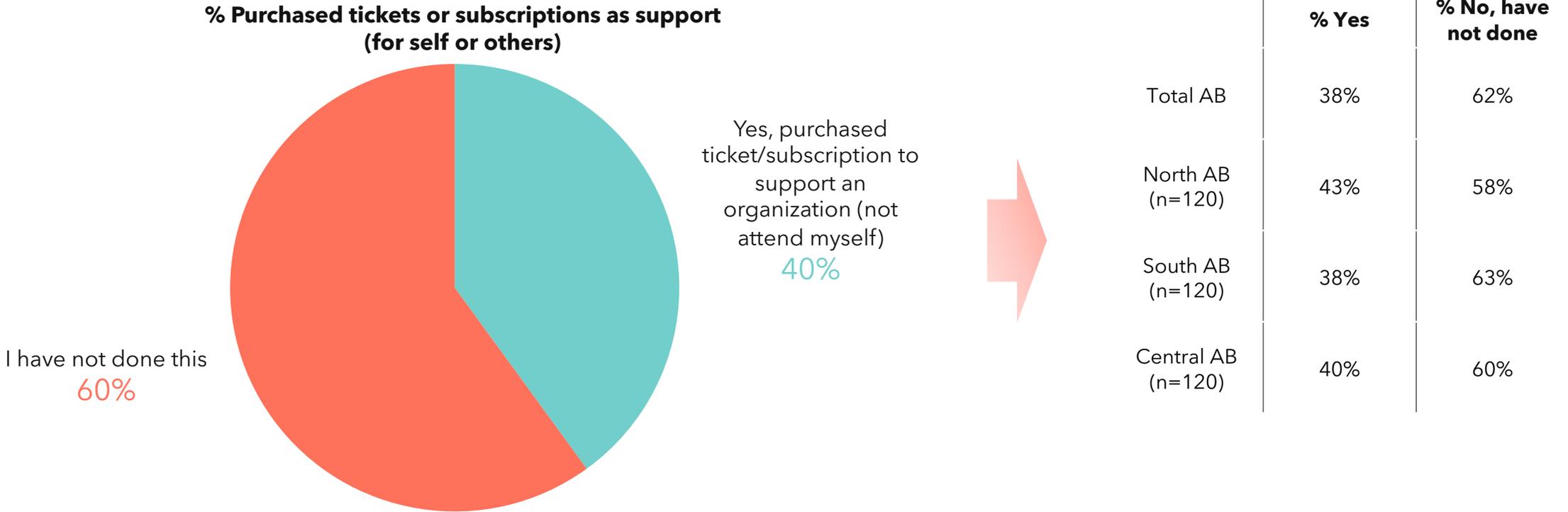
# What are the barriers to the subscription model?

The barriers for regional Albertans do not differ from the rest of Alberta. Interest levels are lower in Northern Alberta and South/Central residents are more likely to cite time as a barrier than other regions.



# However, subscriptions as a means of *support* do still have value.

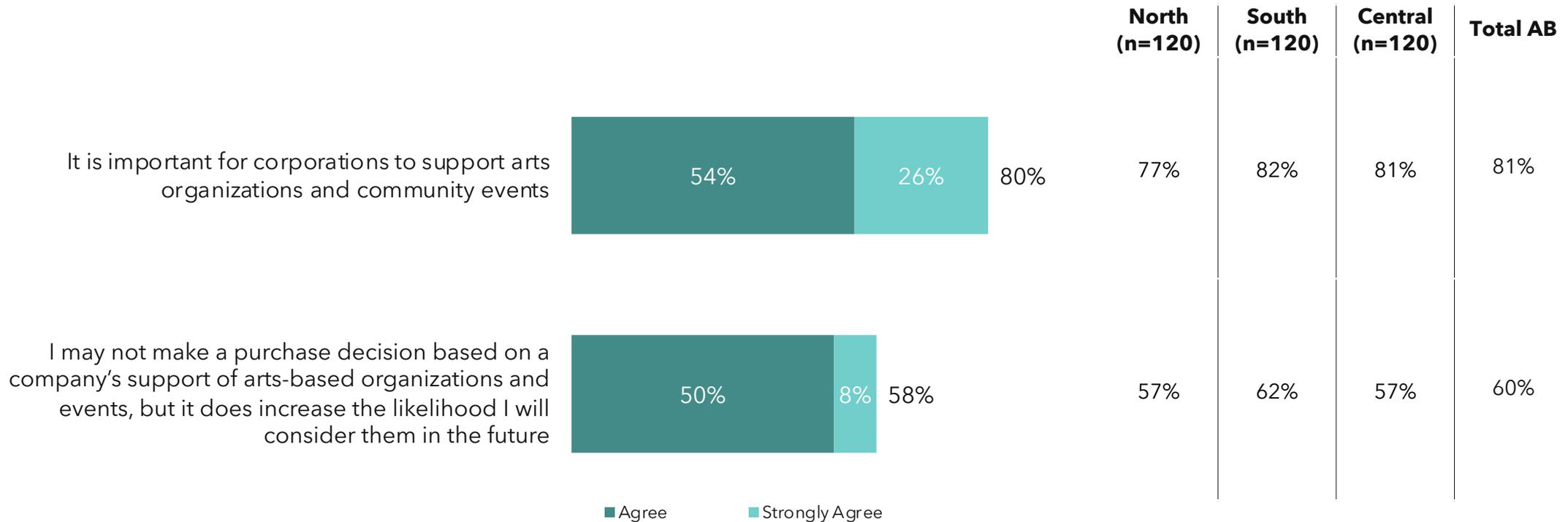
The proportion of regional residents who have indicated purchasing a subscription for the purpose of supporting (not attending) is significant – similar to arts-engaged Albertans in the rest of the province. Interestingly, Southern AB residents are least likely to engage in this type of exercise.



Base: Regional Albertans (n=360) 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?

# There is a role for businesses to play in support.

Regional residents hold a similar view about the role of businesses in supporting the arts whereby there is strong agreement for the importance of businesses to play a role in supporting arts organizations and community events.

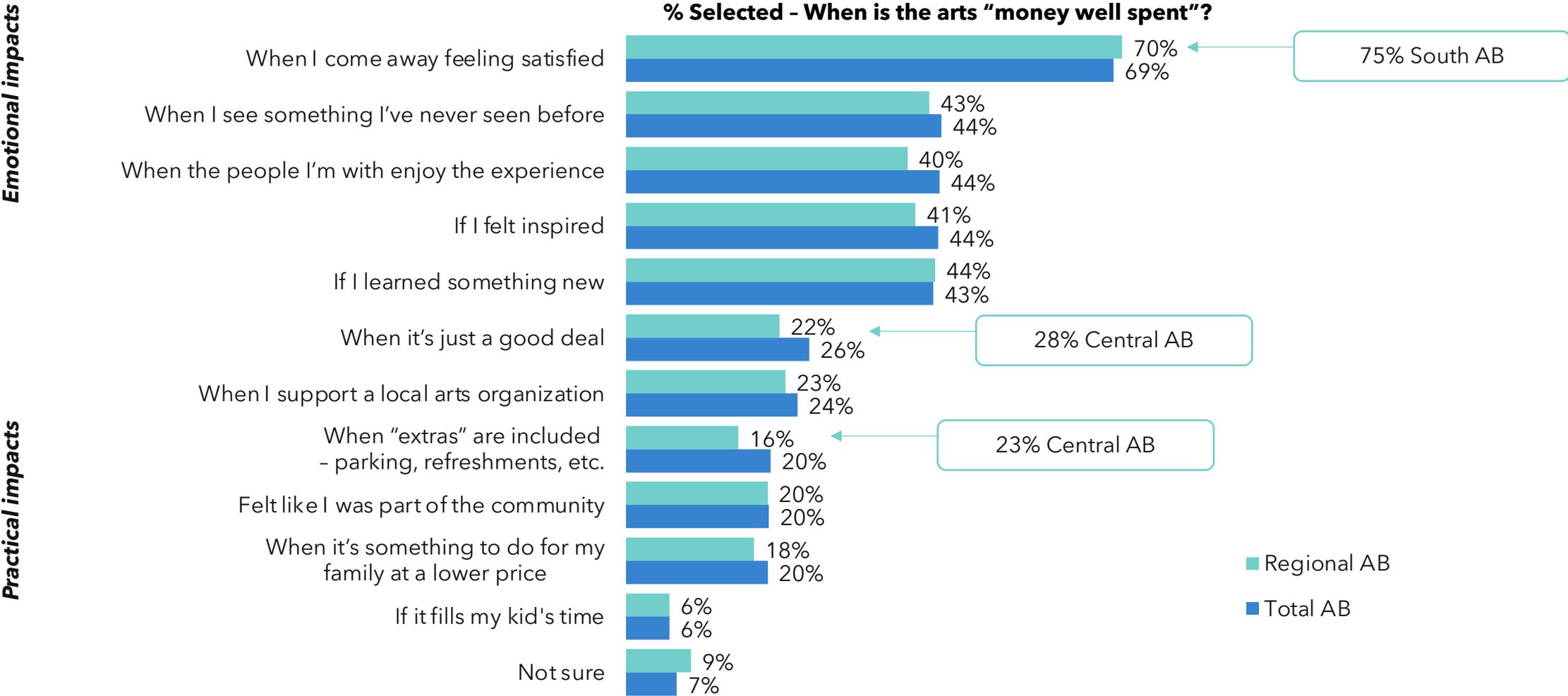


# (Re) defining Experiences

A black and white photograph of an art gallery. A person is seen from behind, standing in the center of the room and looking at a large, central painting on the wall. The painting depicts a mountain range. To the left and right of this central piece are several smaller, framed artworks, including portraits and abstract compositions. The gallery is dimly lit, with the focus on the person and the art.

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

Central AB residents appear to have a slightly higher priority on practical elements.



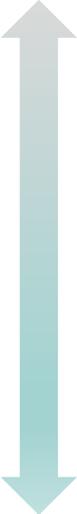
Base: Regional Albertans (n=360)Albertans (n=1,160)  
 Q23. When you spend money on arts activities or events, how do you know it was worth the money spent?

# Anything “remarkable” has an emotional component.

The building blocks for a remarkable experience are similar across the province and need to have an emotional component. Central residents tend to prioritize practice (i.e. service) more than other regions but the desire for emotional benefits is still strong across the board.

	<b>% Remarkable Experience (Top 3 selected)</b>	<b>North (n=120)</b>	<b>South (n=120)</b>	<b>Central (n=120)</b>	<b>Total AB</b>
Things that make you FEEL (happy, sad, any emotion)	 46%	50%	51%	38%	47%
Things that are FUN	 41%	46%	35%	42%	39%
Content or things that make you LAUGH	 38%	37%	38%	41%	34%
Activities or content that help you ESCAPE from the ordinary	 32%	35%	37%	25%	32%
Things that are UNIQUE and DIFFERENT	 29%	28%	30%	30%	29%
TRANSFORMATIVE - making you feel a little different than before	 25%	20%	33%	22%	28%
Events that IMMERSE you completely in an activity	 24%	23%	21%	30%	27%
Events that provide UNEXPECTED experiences	 21%	21%	19%	24%	20%
FANTASTIC service from people who run the event	 12%	8%	8%	18%	13%
Events that CONNECT you to other people in the audience	 8%	8%	8%	8%	8%
Content or events that are BOLD	 5%	3%	5%	7%	5%

Emotional



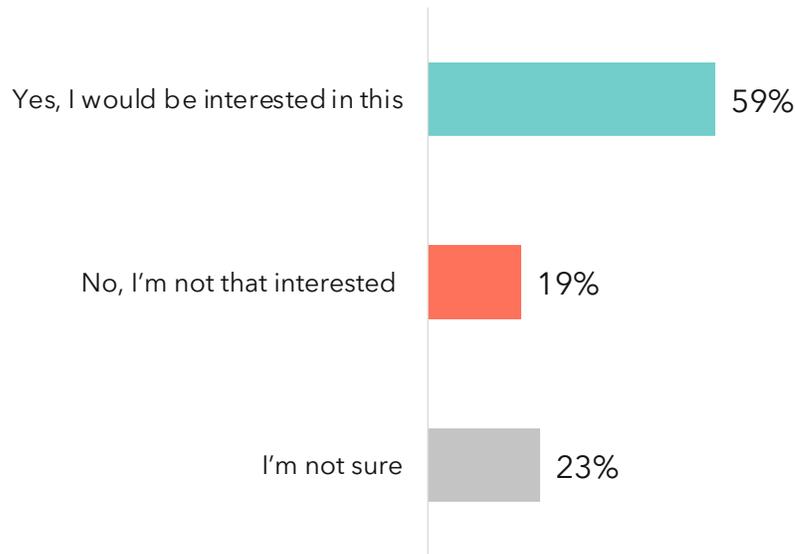
Practical/  
Thinking

Base: Regional Albertans (n=360); 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 majority of regional audiences are keen to have a non-curated information source, but the preferred method for receiving this varies. Central residents have a greater preference for social media compared to the other regions but there is a stronger preference for local publications as well.

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



	% Selected - preferred sources (Among those interested)	North	South	Central	Total AB
		(n=92)	(n=100)	(n=101)	
Direct email	45%	46%	43%	46%	44%
Local publications	50%	52%	51%	47%	41%
Instagram	24%	24%	17%	32%	37%
Local TV news	29%	26%	33%	28%	31%
Cultural organization websites	30%	33%	30%	28%	27%
Newspaper websites	31%	29%	36%	27%	26%
X (formerly Twitter)	15%	9%	15%	22%	18%
Online magazines	12%	12%	10%	15%	14%
TikTok	12%	11%	8%	17%	13%
From local influencers that I follow	11%	11%	8%	13%	12%
Cultural organization blogs	8%	8%	12%	4%	11%
Personal blogs	6%	8%	3%	8%	7%
Something else	16%	20%	13%	15%	12%

Base: Regional Albertans (n=293)  
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?

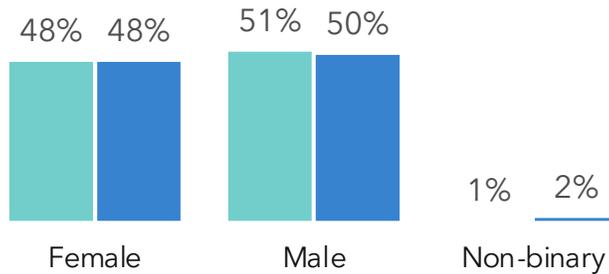
Base: Interested in non-curated sources; Regional Albertans (n=293); Albertans (n=967)  
Q26. Thinking about where you would most want to find out about events in your community, where would that be? Please select all that apply.

# Respondent Profile

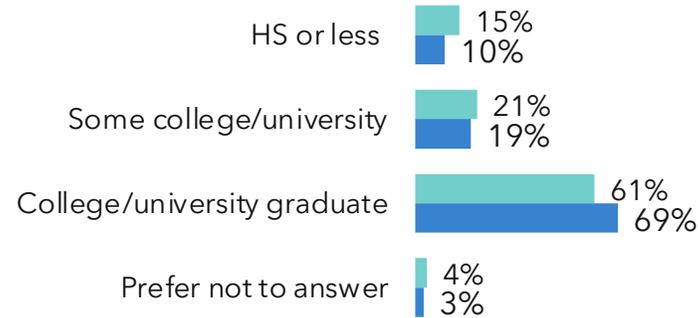


# Respondent Profile: Who We Heard From (North, South, Central AB n=360)

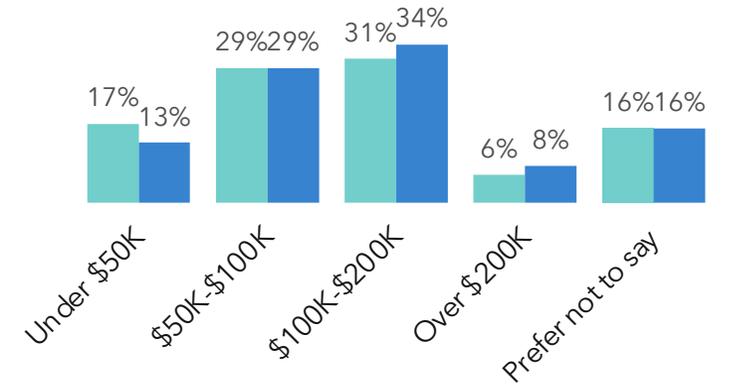
## Gender



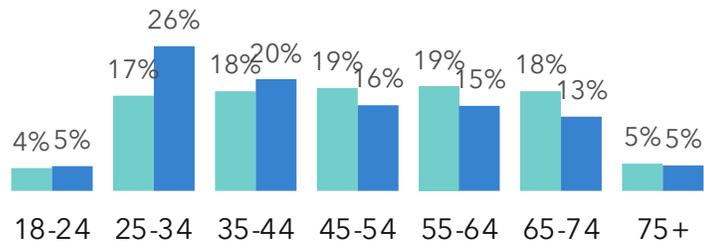
## Education



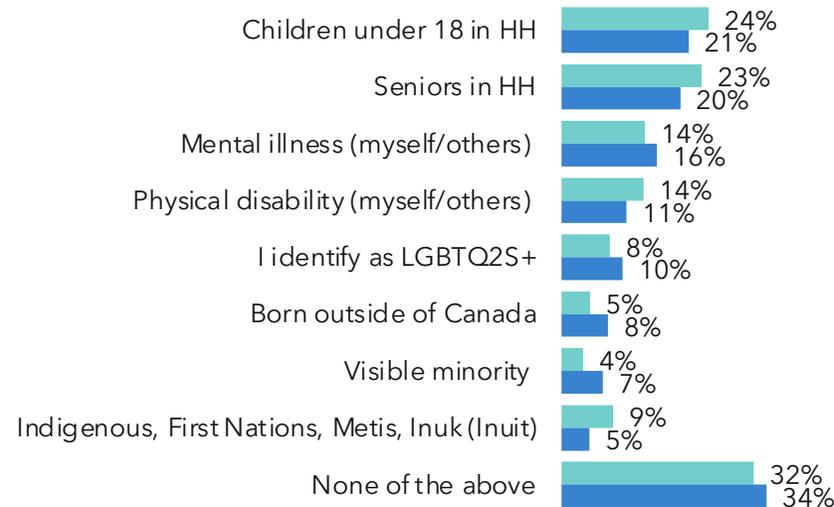
## HH Income



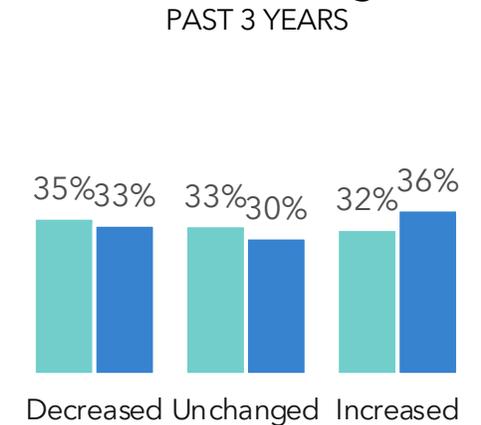
## Age



## Diversity/Identity



## Income Change



**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)