

Spotlight on Arts Audiences

Wave 2: Spring 2024
Calgary results



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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 and Objectives:

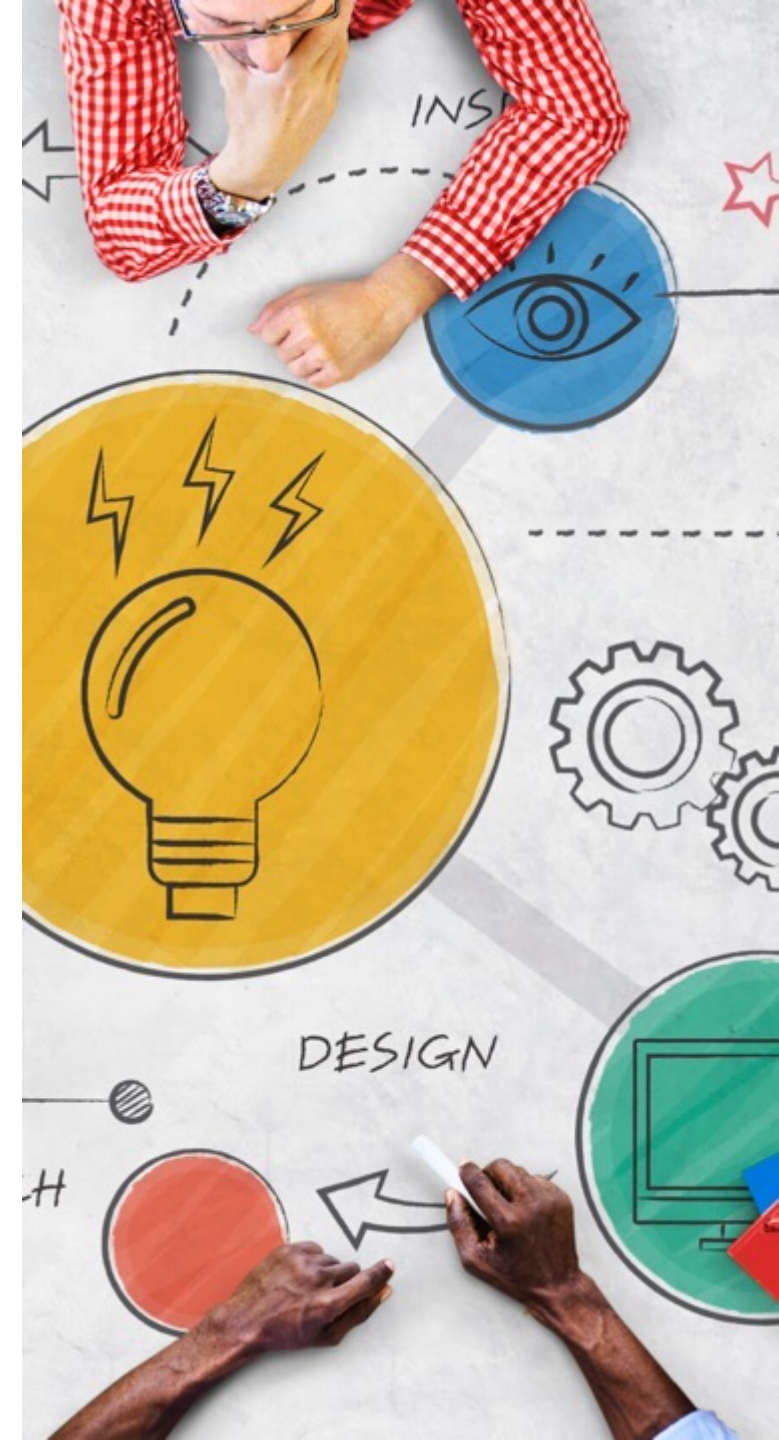
Alberta continues to be at a crossroads brought by a pandemic that has changed public life and re-shaped our economy. This is especially true in the arts sector which continues to experience a decline in engagement with events and activities. This work was developed for this sector exclusively. It builds 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 2:

- Exploring arts engagement and general perceptions
- Understand audiences' preferences for content, programming and ticket purchasing
- Understanding opportunities for increasing support and engagement

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 second 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 March 13th -21st, 2024.

An approximate margin error for a typical sample size of n=1,160 is +/- 2.9% and for n=400 is +/- 4.9% (which is not typically applicable for online non-probability samples).

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.



What is different in Calgary?

In short, very little! Arts-interested individuals across Alberta have very similar behaviours when it comes to digital arts experiences, attitudes and interest in programming content, interest in ticket bundling options, and charitable giving. There are very few regional differences this wave. A summary of what we learned is below:

- 1** **Arts-related online content can be the start of a journey.** Online content specific to the arts (and outside of mainstream offerings such as Netflix and Spotify, as an example) is readily available and audiences are accessing it. Understanding digital and content preferences can kickstart programming decisions or be an opportunity to begin engagement close to home (that leads to an in-person experience). But live is the differentiator and reminding audiences what emotional benefits are derived from live performances is going to be key to driving in-person engagement (and moving beyond online engagement only).
- 2** **Reaching new audiences through diverse programming.** While the sentiment is strong for all arts audiences, visible minorities are even more keen to support arts experiences that showcase their own cultural groups. In fact, this audience is taking in online community meetings/discussions more often than other Albertans. This represents one opportunity to expand into potentially new audiences.
- 3** **The market craves flexibility.** Whether it is the type of content (the preference being a mix of new works and familiar programming), interest in a ticket bundling package (giving flexibility to select performances of interest and the number of performances they can realistically take in), or even ways to support, audiences are looking for variety and choice.

Engaging in Arts Experiences



A reminder on engagement levels

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.

IMMERSED

This is a group that is **eager** to connect with the arts. They take in a **variety of arts** content and are active supporters of artists and art organizations.

ENGAGED

They like arts experiences and **frequently** attend events or activities, consume arts content, make art, and support the arts.

PASSIVES

This group makes up the largest proportion of Albertans. Their engagement with the arts is **occasional** and they attend arts events, watch arts content or pursue arts experiences.

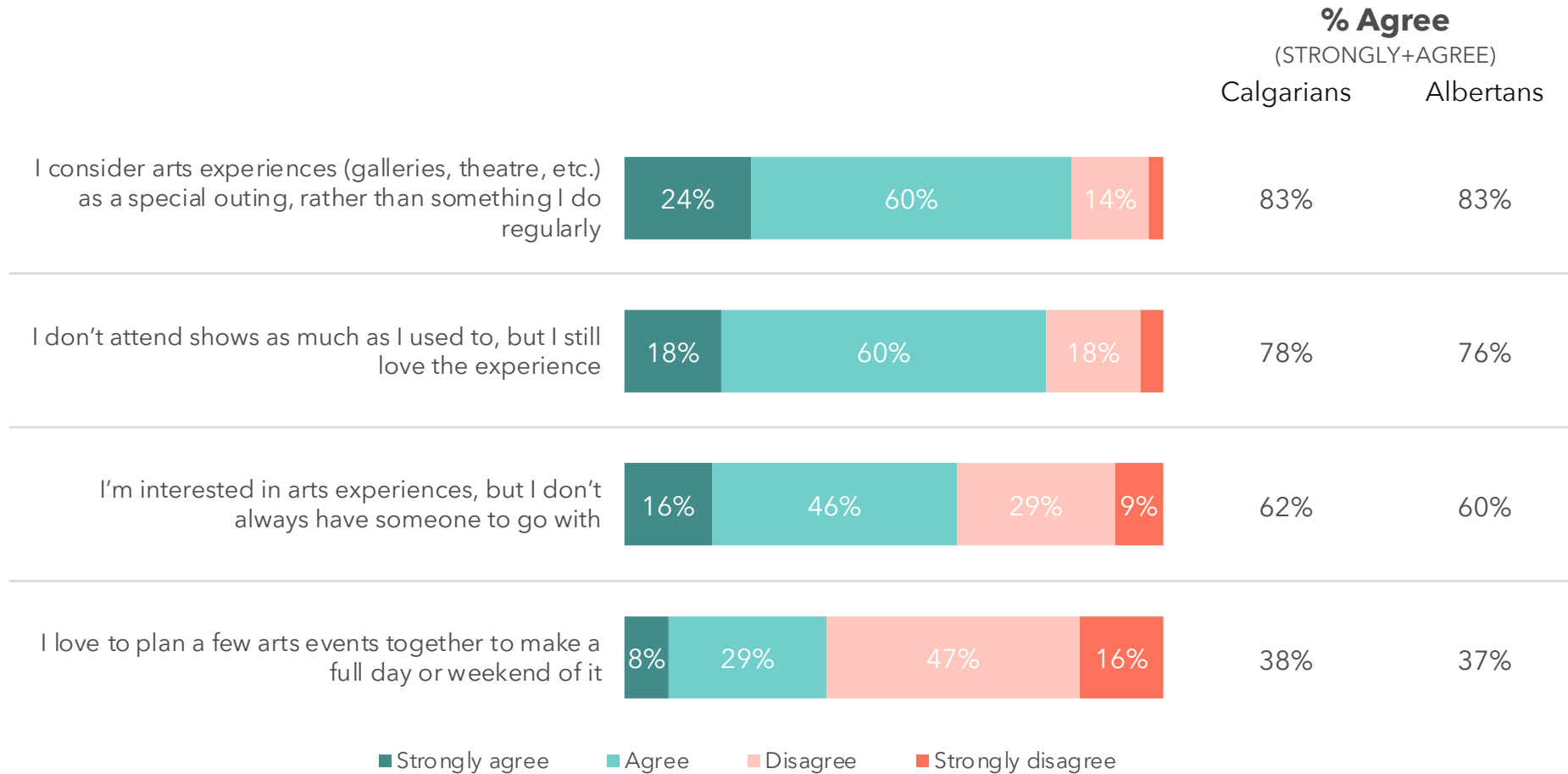
INFREQUENT

They have an interest in the arts but **rarely** attend arts events, consume arts content, make any type of art or take any classes.



Many Calgarians consider arts experiences as a special outing

Calgarians are similar to Albertans in many of their attitudes towards experiencing events. Over three quarters indicate they don't attend as much as they used to, and many have interest but look for someone to attend with.



Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)

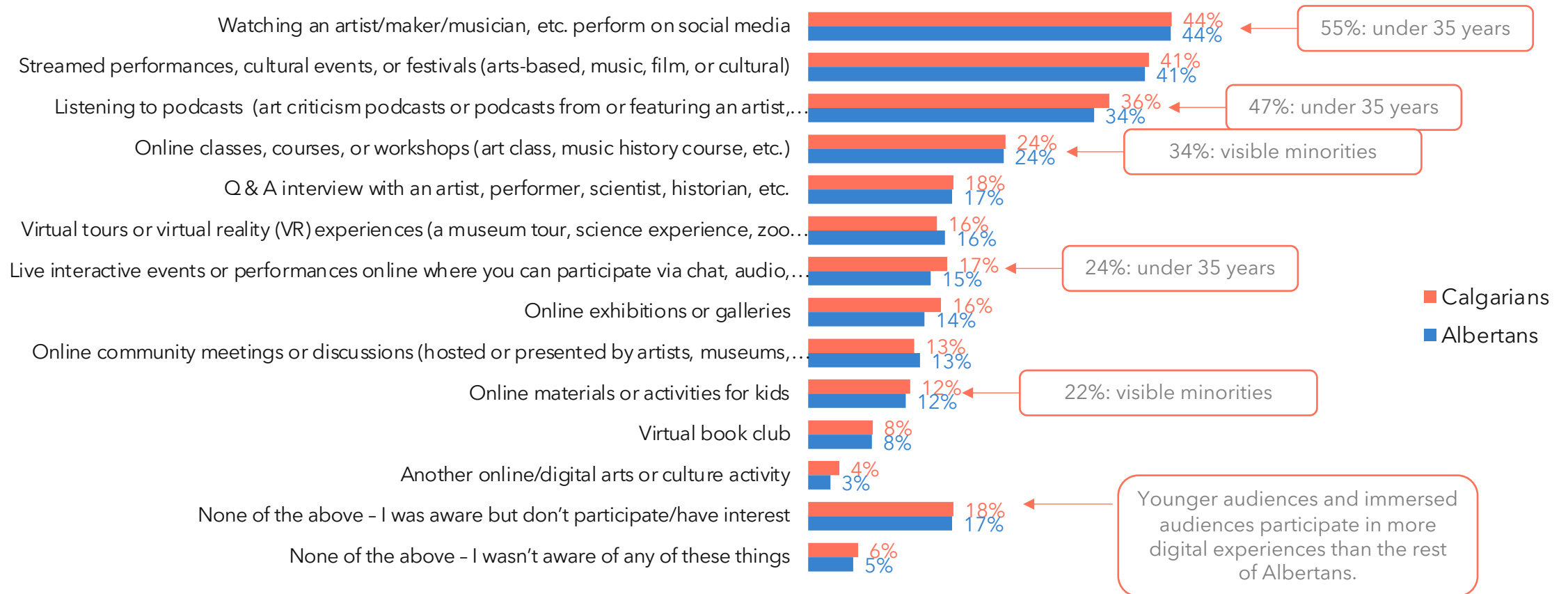
Q12. Here are some statements that some people make about what types of performances or events they like to experience. Please indicate your level of agreement with each statement



Is digital participation in the arts still prevalent?

In short, yes. Calgarians are participating in digital arts experiences in a similar manner to Albertans. Most often, they are watching artists on social channels, streaming art performances, and listening to arts content via podcasts. Compared to all Albertans, they are listening to arts podcasts, experiencing live interactive performances, and visiting online exhibits/galleries slightly more often. Digital arts experiences are still present and are an easy way for arts-interested Albertans to participate.

Digital Arts Related Activities - % Participation



Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)

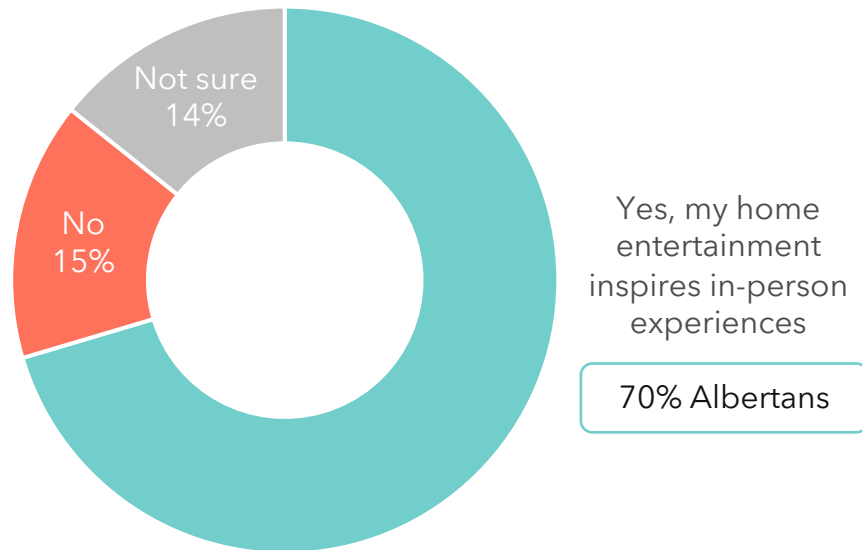
Q10. Thinking about arts-related activities specifically, which of the following do you participate in digitally? This might be via your computer, a streaming service, TV, mobile phone or tablet.



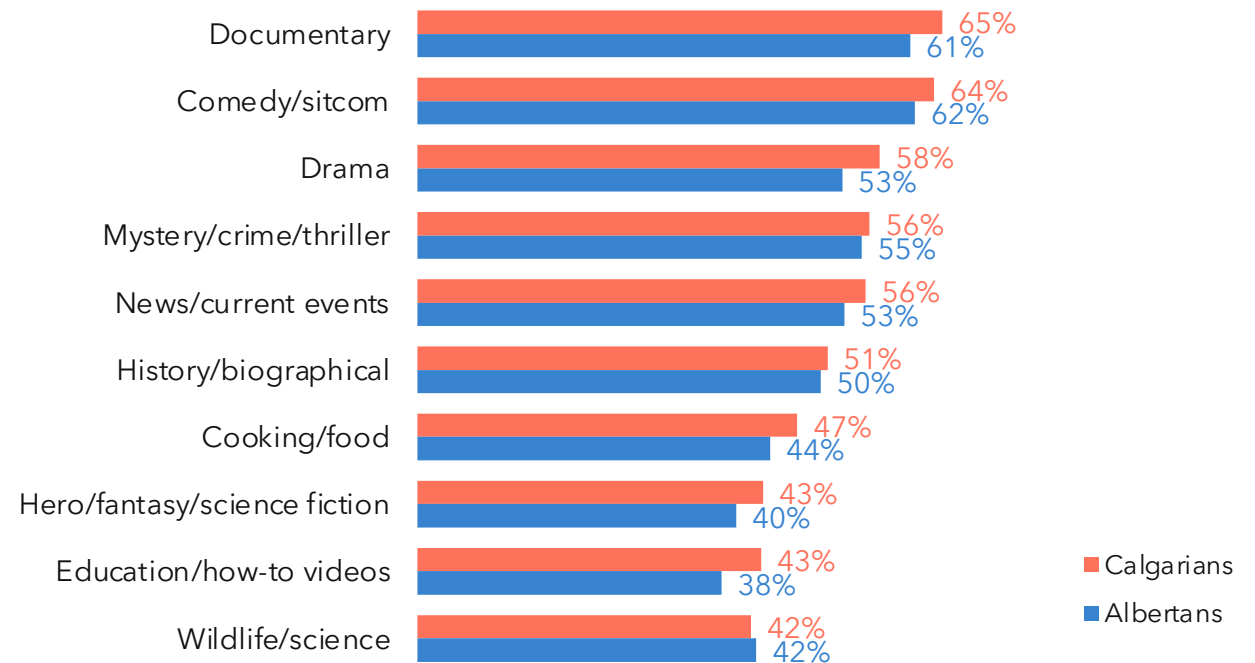
And at-home behaviour influences interest in live events

Since Calgarians may be inspired to attend live events based on what they enjoy in their home, it is important to understand at-home preferences. Their interest align with others in the province, but they stand out slightly on their preference for documentaries, dramas, and educational/how-to videos.

At home entertainment impact on in-person experiences



% Genre - watch at home regularly (Top 10 genres for Calgarians)



Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)

Q11. At any point, has anything you've watched or listened to on TV, online or on the radio inspired you to think about live experiences you can see in person?

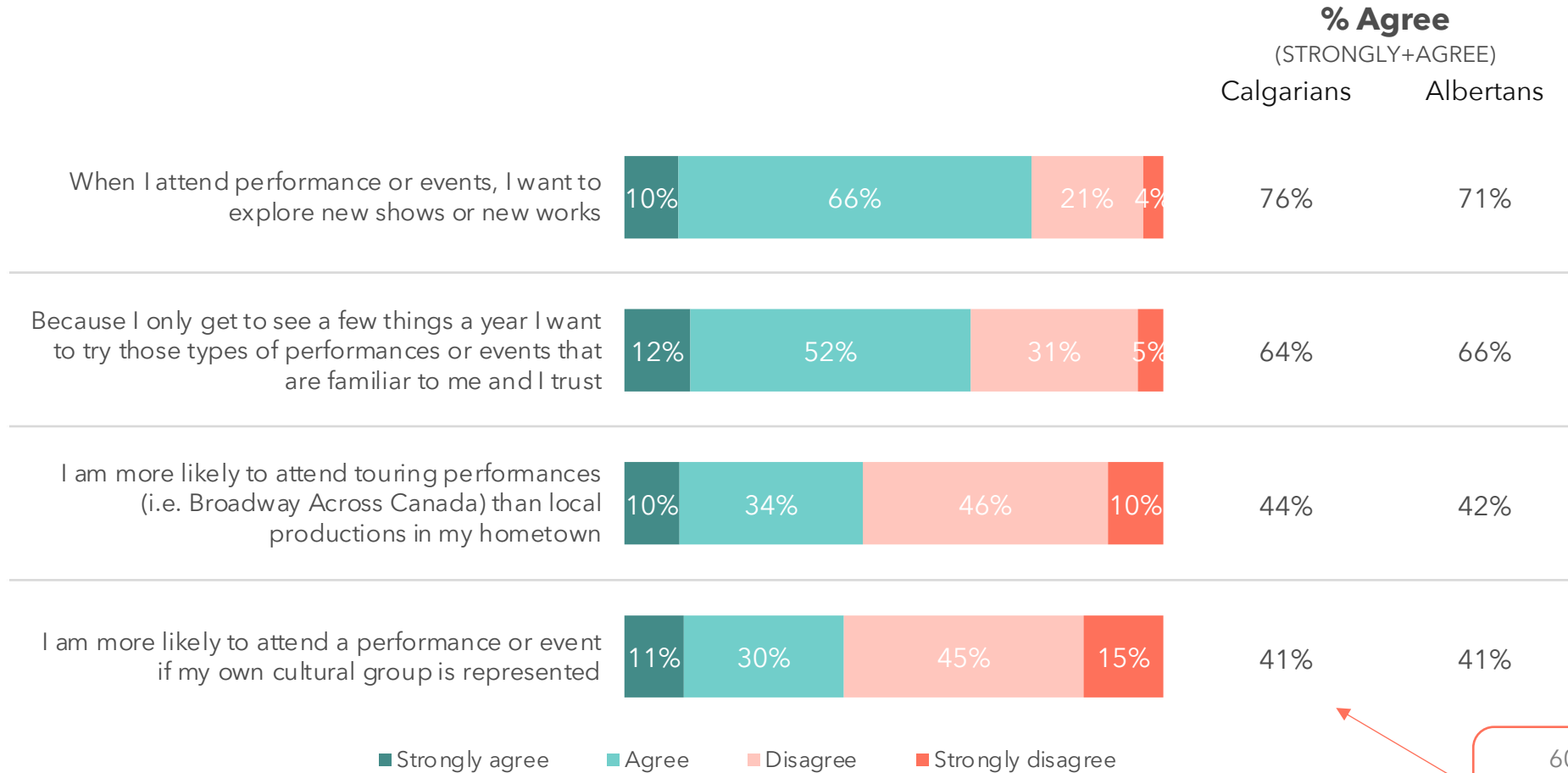
Q8. When it comes to entertainment and media, what types of content do you regularly watch at home?

Content Preferences and Informing Programming



Calgarians are interested in new works as well as what is familiar to them

This is similar sentiment as others in Alberta and may appear to provide limited guidance to arts organizations, but the soft levels of agreement suggests audiences are willing to experience a variety of works.



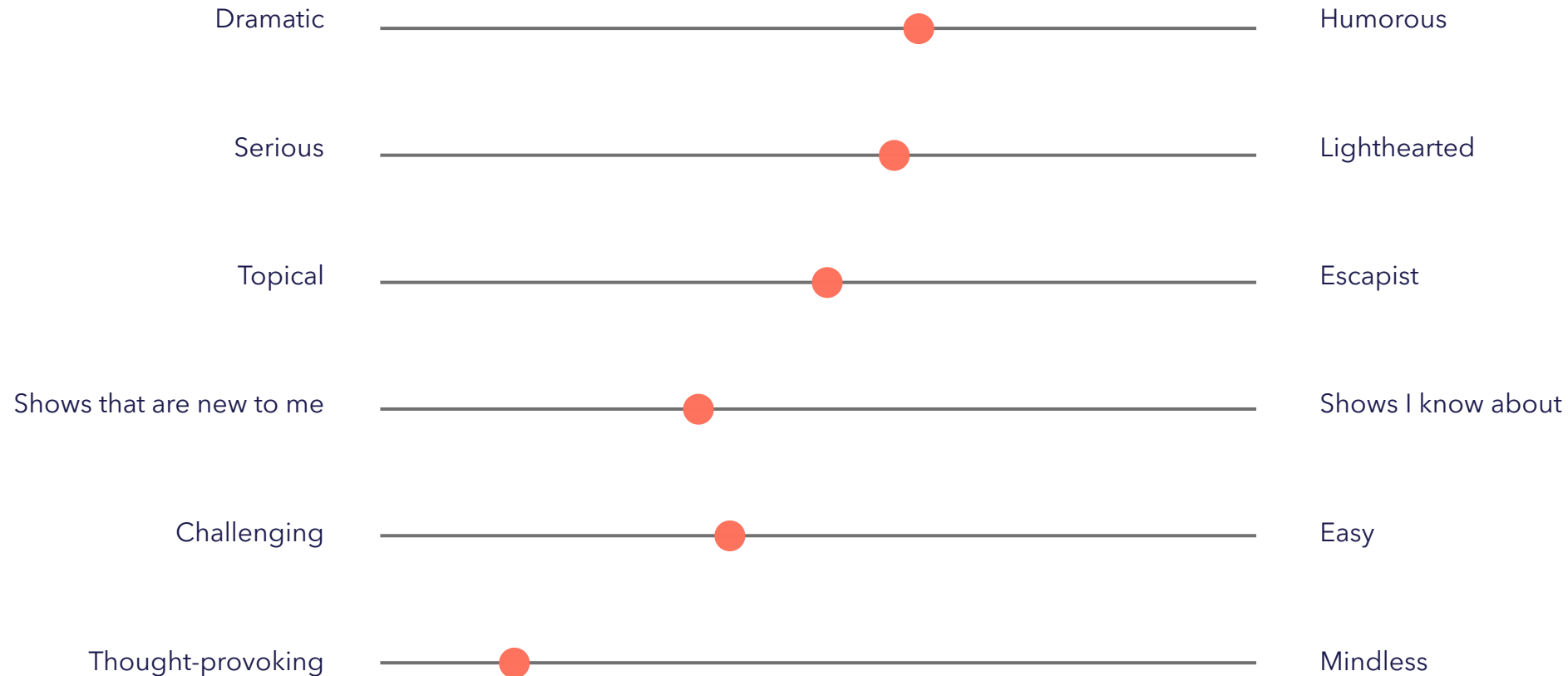
60% of visible minorities in Calgary agree



Content preferences for Calgarians aligns with the types of works Albertans want to see

Generally, audiences like challenging and thought-provoking but want balance with lighthearted content. This suggests emotive is key; audiences are clearly open to thought-provoking content but still want an element of humour, whether that is in the same performance or separate works. In short, **variety** may be something audiences are looking for.

What do they want to see?



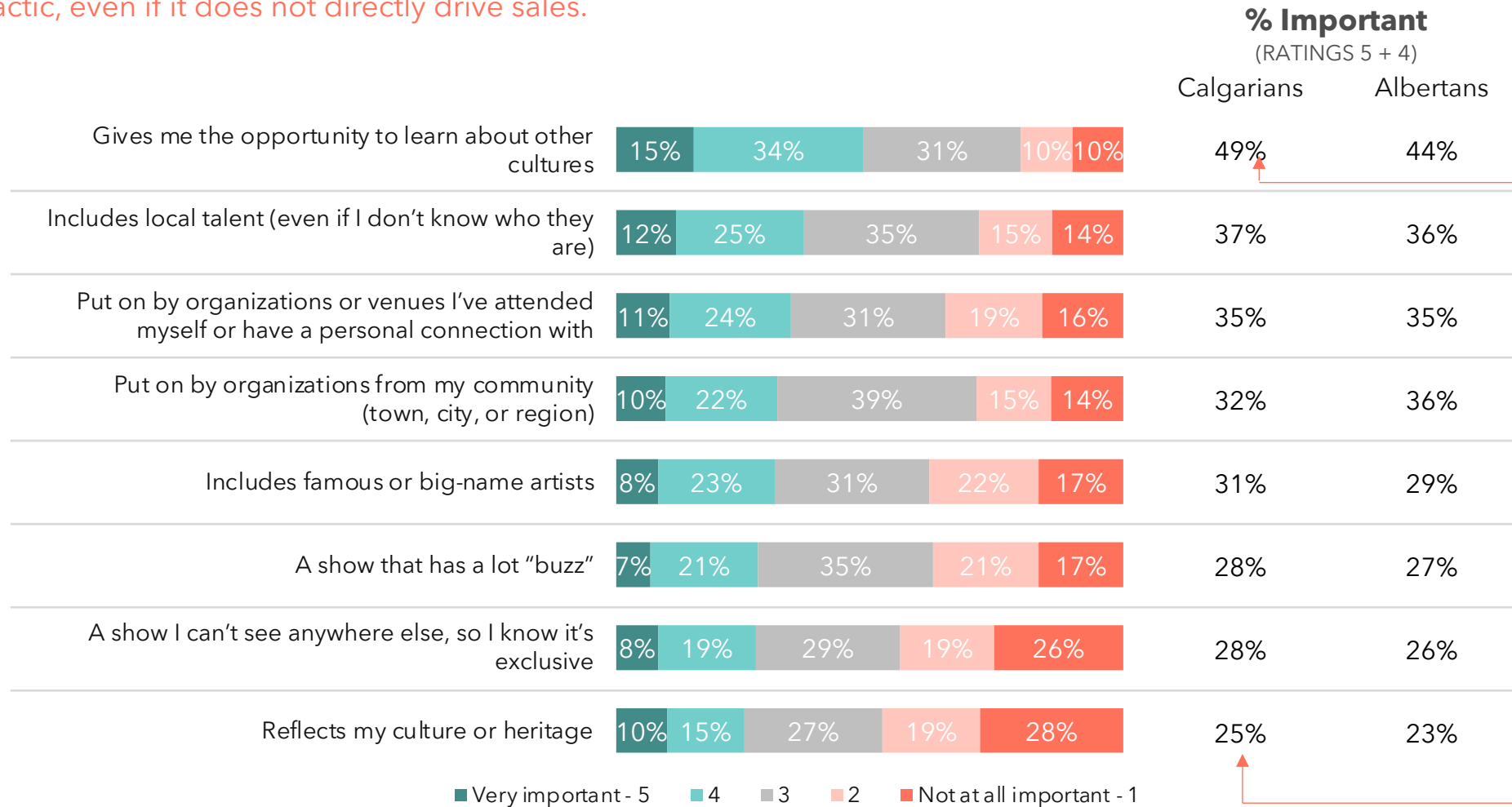
Key differences:

- Female respondents are more likely to consider new works and dramatic works over male respondents (prefer familiar, humorous, escapist).
- Immersed respondents are more likely to prefer works that are easy, lighthearted, familiar, and mindless.
- Respondents from minority communities are more likely to prefer humor, lighthearted, and familiar.



Cultural diversity and including local talent are important show elements for Calgarians

Calgarians find learning about other cultures slightly more important than the rest of the province, but overall the local component may be a differentiator for organizations across Alberta. This can be used as a messaging tactic, even if it does not directly drive sales.



Learning about other cultures is important among visible minorities (60%)

Greater importance among visible minorities with 50% say it is important to see their culture or heritage represented

Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)
Q14. Thinking about different kinds of arts activities and how you decide what to attend, how important are the following qualities?

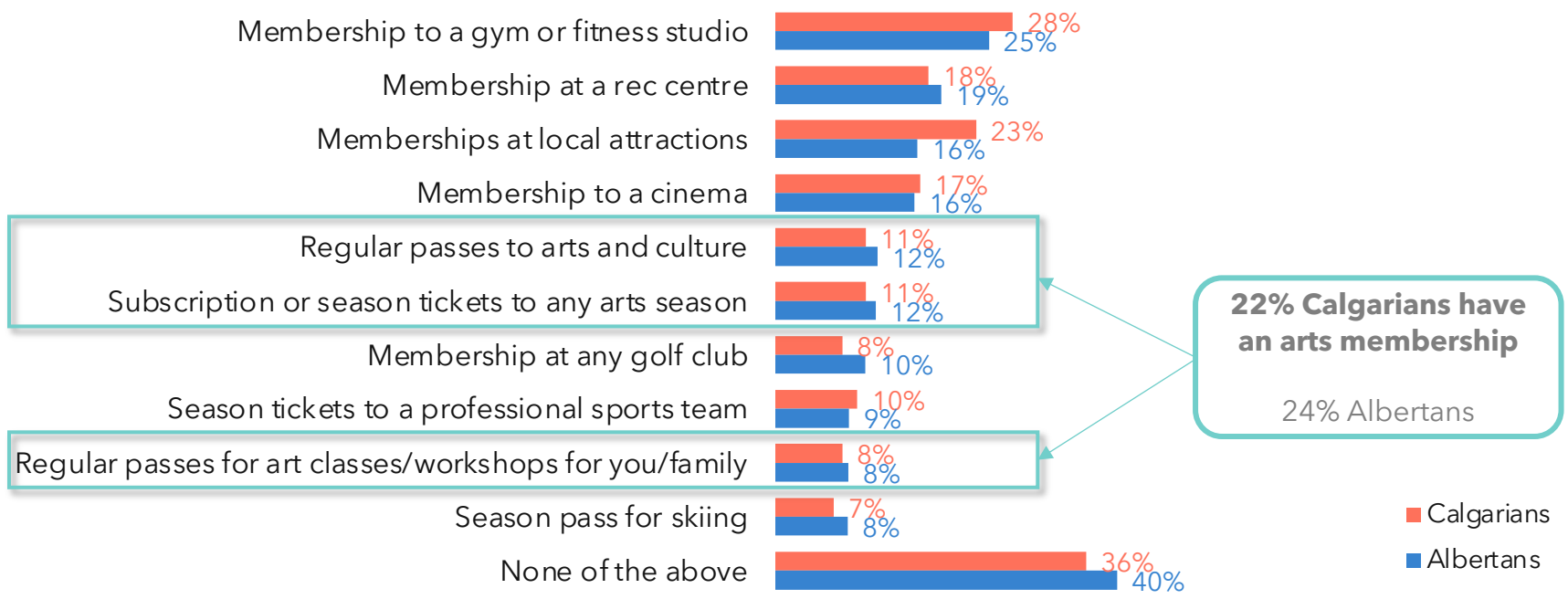
Memberships and Ticket Bundling Options



Calgarians hold memberships at fitness or recreation facilities as well as local attractions

Arts memberships or season tickets are much less common across the province (Wave 1 research indicated this is also on the decline).

% Selected - Type of membership



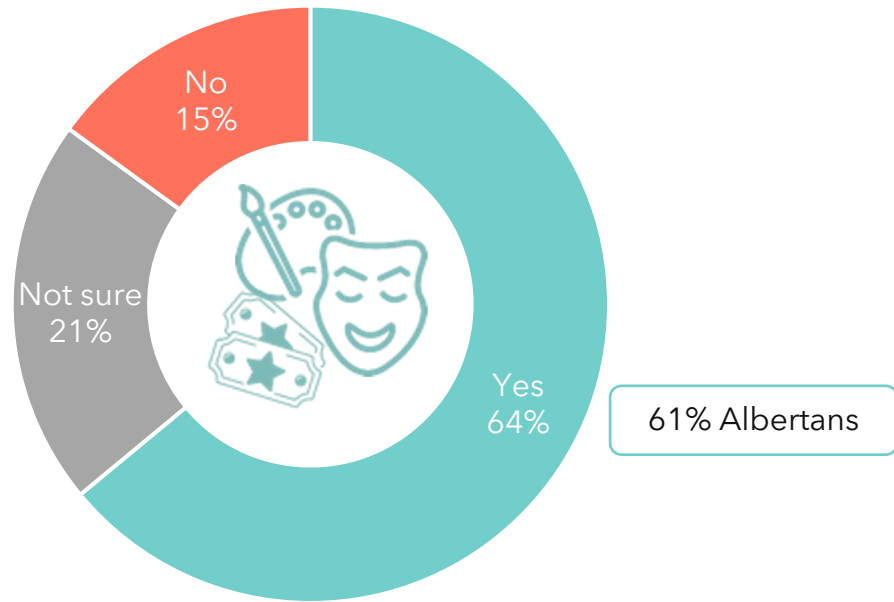
Base: All respondents Calgary (n=400), Alberta (n=1,160)
Q15. Looking at the list below, do you have a membership, subscription, season pass, or something similar to any of the following?



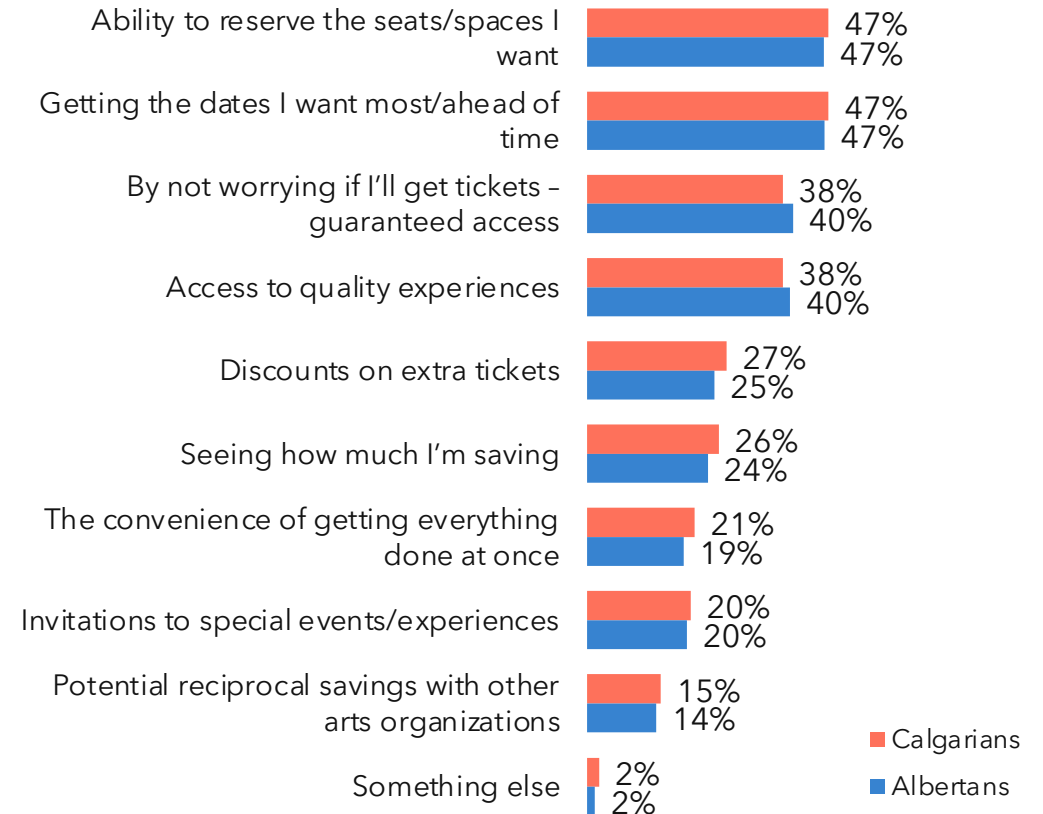
But there is opportunity for a bundling ticket options for arts experiences

A more flexible configuration may be more palatable than a full subscription because it offers inherent **value** and **flexibility**.

Consider an Arts Ticket Bundle



% Selected Benefits - Top 3



Q16. Thinking about the arts, would you ever consider buying something that gives you access to more than one show but may not commit you to all performances in a season (similar to a ticket bundle, but not a full subscription)? Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)

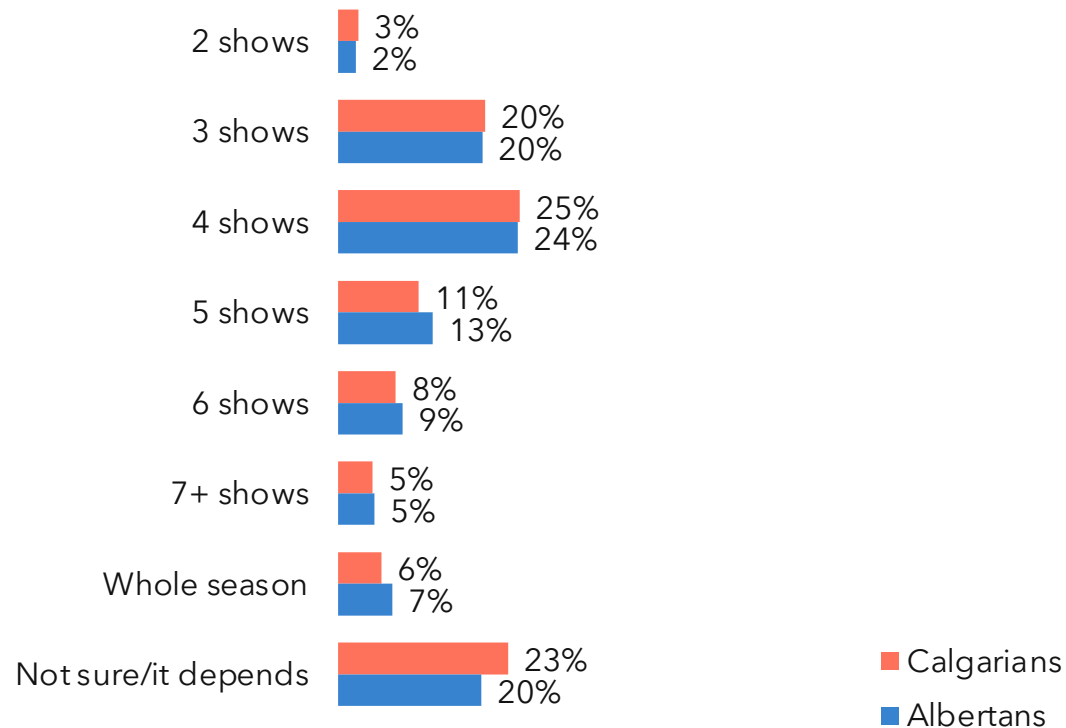
Q21. When you think about paying for this type of multi-show option, what benefits do you value most? Please select up to 3. Base: Would consider an art ticket bundle (n=707)



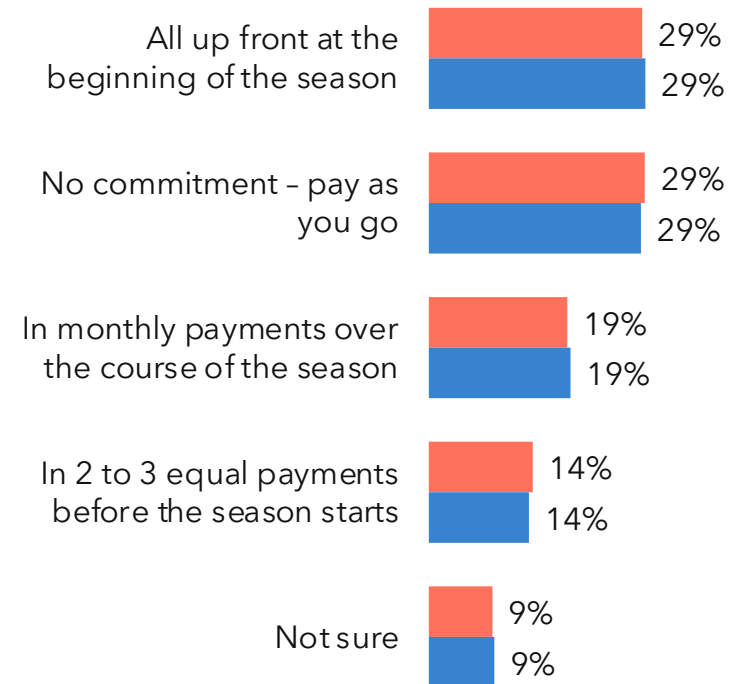
What makes up the ideal ticket bundle?

An economic climate that is still challenging for audiences reflects split preferences on payment and the need for flexibility (those with higher income are more willing to pay upfront).

Number of experiences *Most are looking for 3-4 events*



Preference for payment *Payment preferences are split*



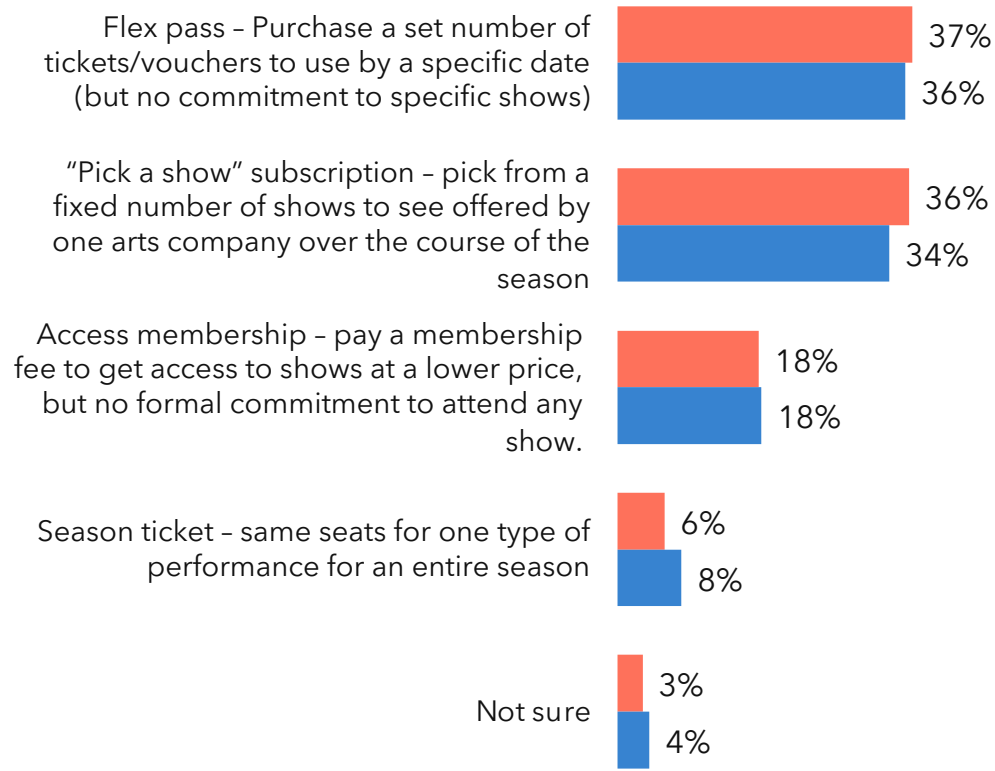
Base: Would consider an art ticket bundle: Calgary (n=255), Alberta (n=707)
 Q17. If you did commit to more than one performance, how many shows would you like to have access to?
 Q20. Given that this type of commitment beyond one show, how would you most prefer to pay for this?



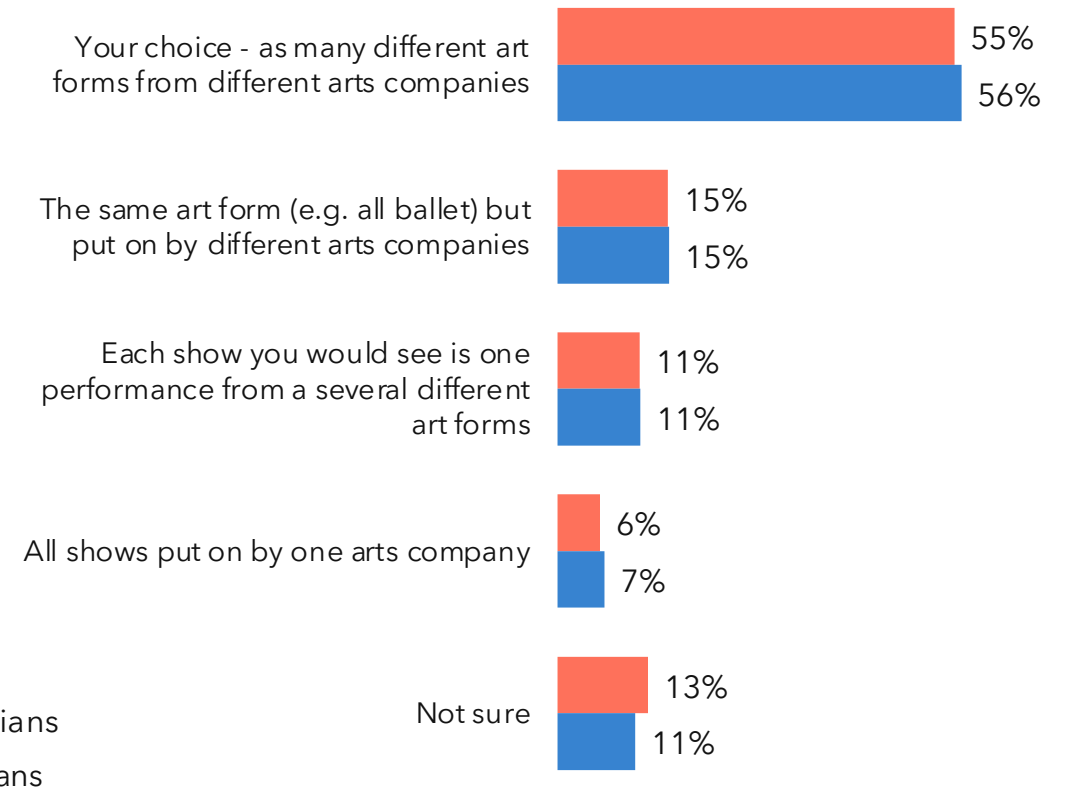
The ability to have choice is most preferred

Choice also reflects flexibility. And when arts experiences are a special outing, the ability to have a flexible array of options to choose from might be more appealing to audiences.

Bundling preference *Flex options*



Types of experiences *Different art forms and different companies*



■ Calgarians
■ Albertans

Base: Would consider an art ticket bundle: Calgary (n=255), Alberta (n=707)

Q18. Below are some options that offer different flexibility in the number of shows you might attend. Which of these do you prefer most?

Q19. Now, below are a few options for types of experiences you can build with this type of multi-show option. Which of these would you prefer?



Understanding support for the arts

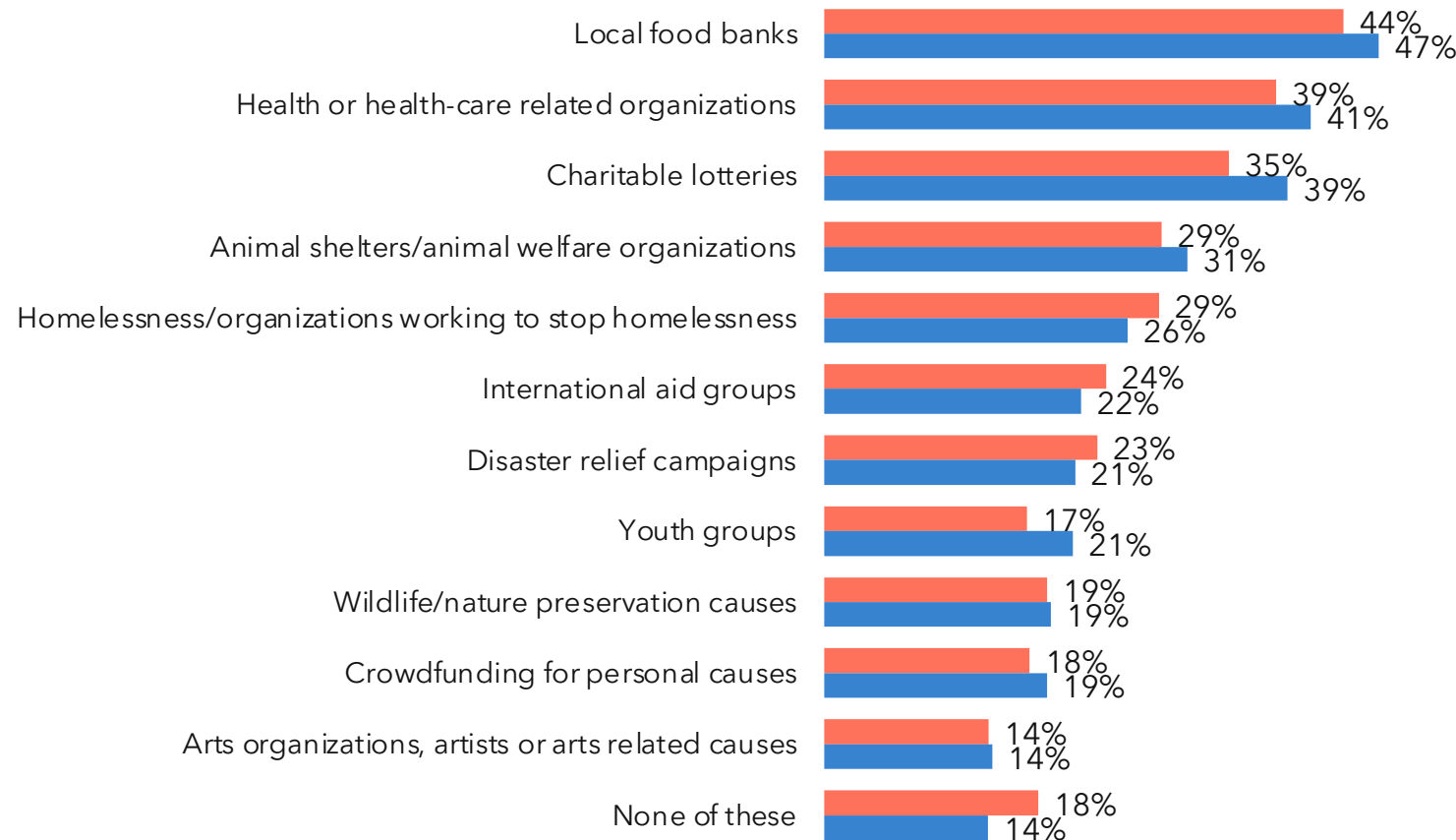


Calgarians appear slightly less charitable than Albertans as a whole (but not by a considerable amount)

But like the rest of the province, arts related causes are less of a priority than other causes to Calgarians right now.



Causes Supported



Alberta remains one of the most charitable provinces in Canada, donating an average of \$3,180 per donor (second on average annual amount).

■ Calgarians
■ Albertans

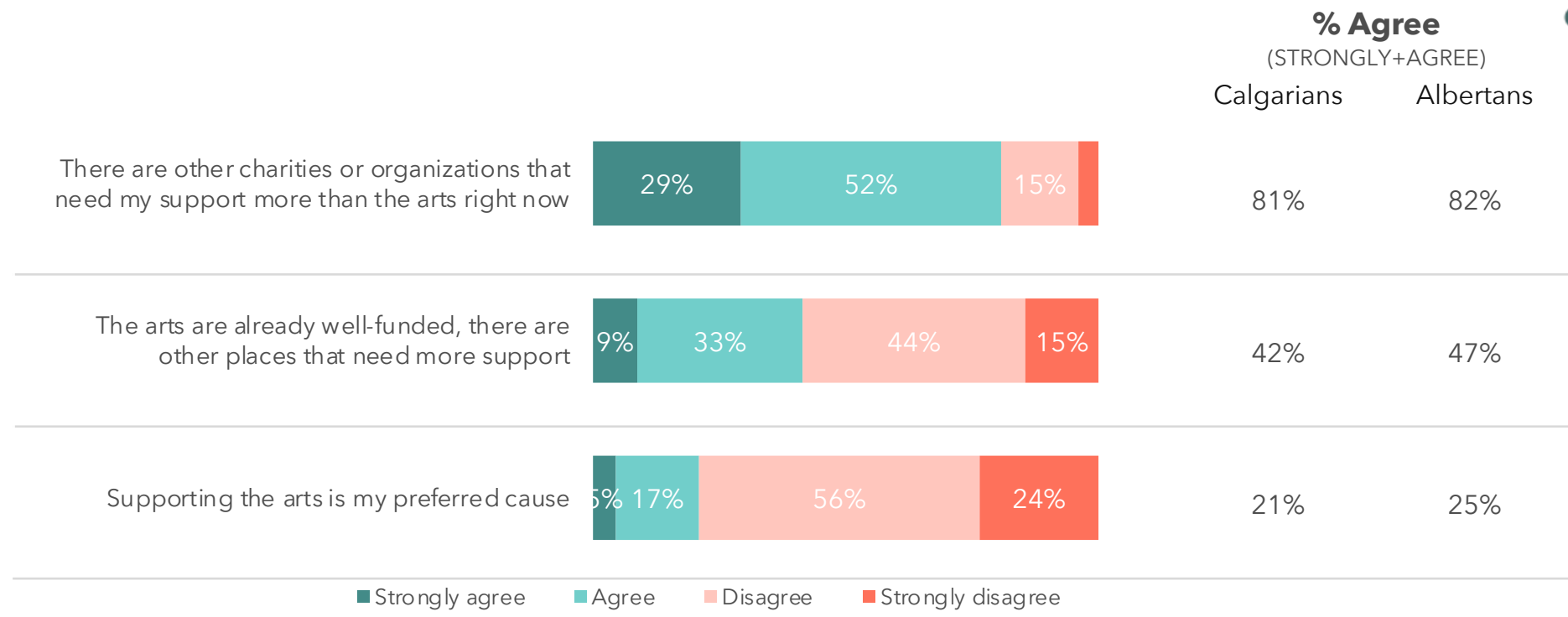


Many Calgarians see greater need for causes other than the arts

Slightly fewer Calgarians agree that the arts are well funded, but even then, they have a perception that their support is needed across other organizations than with the arts.



It will remain a challenge to position the arts are worthy over other causes (particularly social causes), so efforts likely need to focus on smaller ways to support *in conjunction* with other causes.



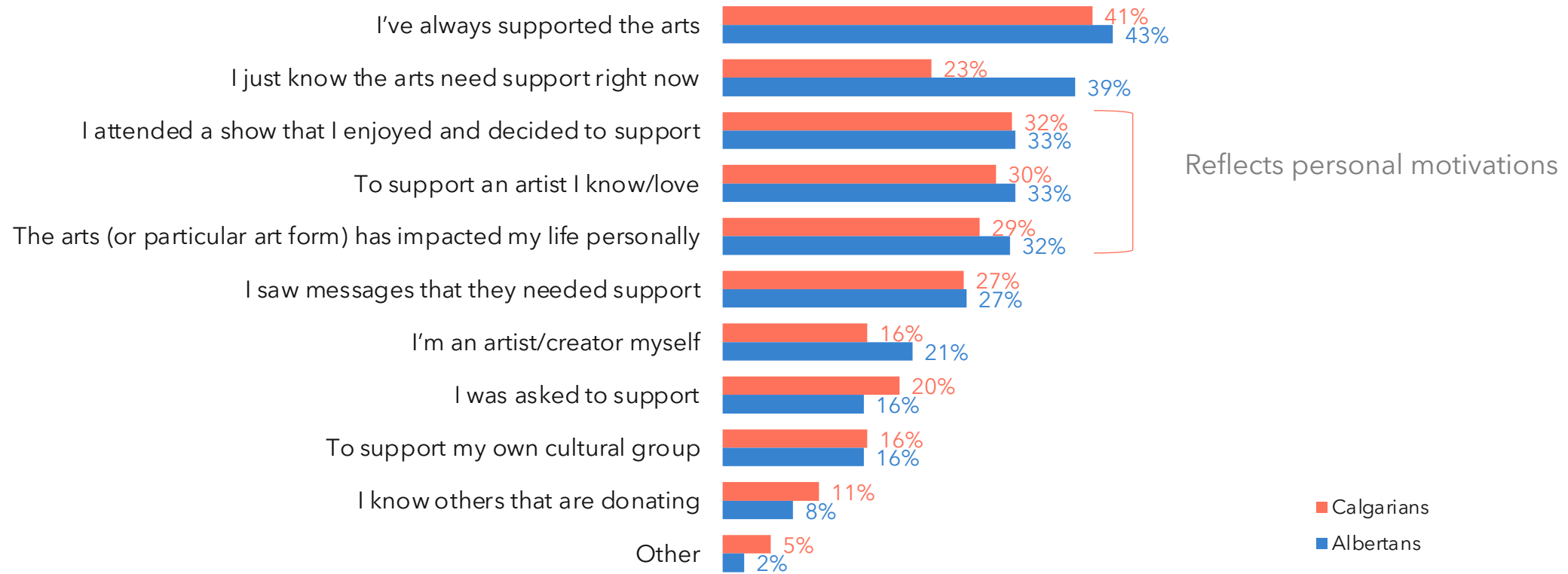
Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)
 Q28. Below are a few statements about supporting the arts. Please indicate your level of agreement with each.



Most often those who support the arts do so because they have a history of giving to the arts

Interestingly, Calgarians are not aware of how much support arts organizations need right now compared to all Albertans. However, focusing on **personal relevancy** will also be key to encouraging support.

Reasons for support arts organizations

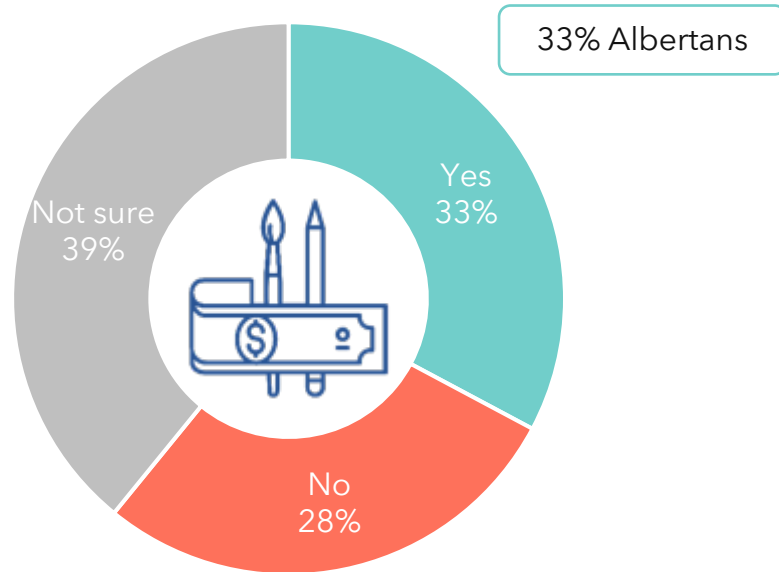




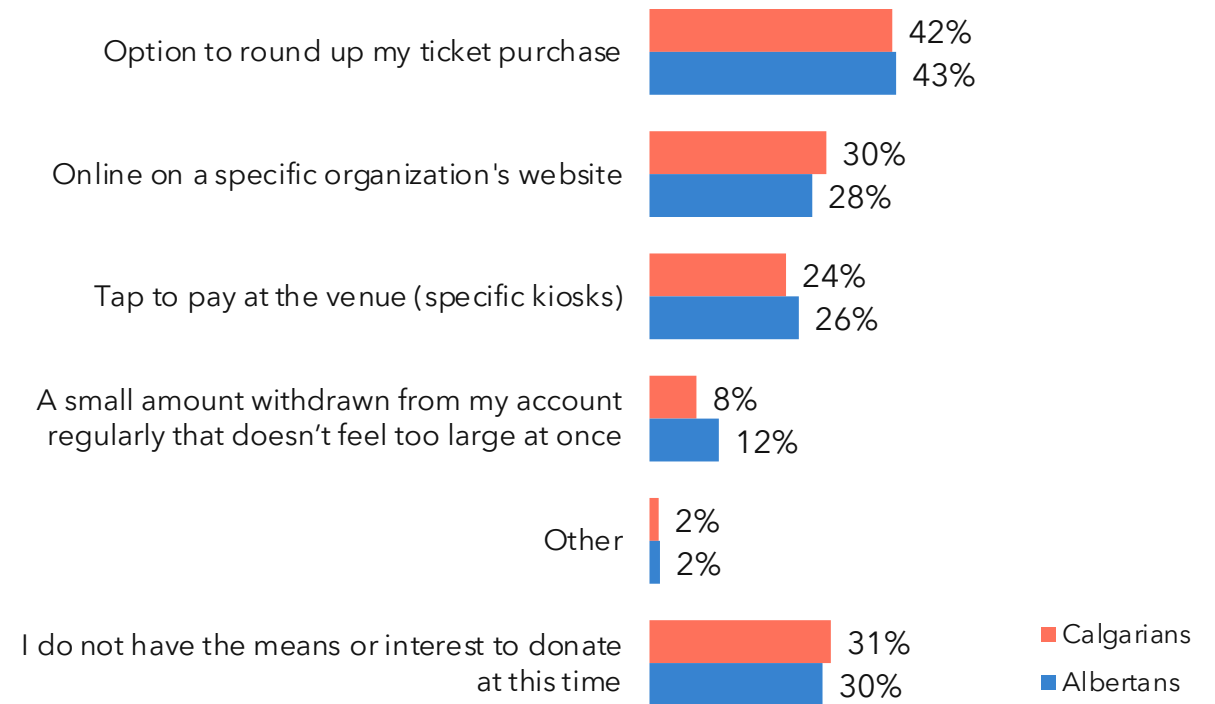
Similar to Albertans, a third of Calgarians indicate a willingness to support the arts

But conversion will be a challenge. Calgarians (and Albertans) are most willing to donate through a small ticket round up option provided at the time of purchase. Although small from a one-time donation standpoint, there is long-term impact as an additional stream of support.

Arts Support Consideration



Preferred Method of Donation



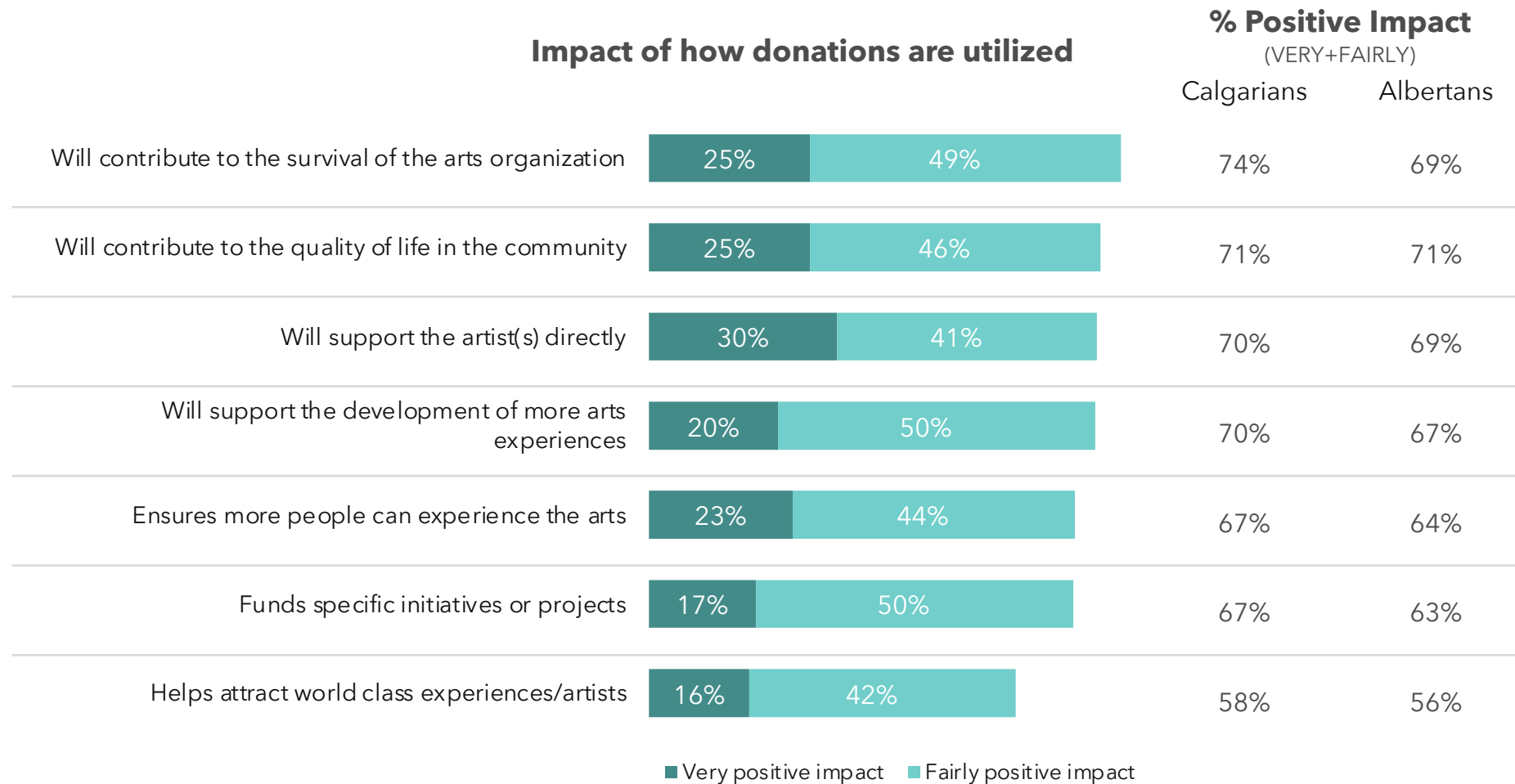
Q23. Would you ever consider donating money to show financial support for an arts organization, artist or related cause? Base: Household doesn't currently support arts organizations: Calgary (n=344), Alberta (n=994)

Q24. There are many ways to donate to an arts-based organization, some are listed below. How would you be willing to donate? Base: Would consider supporting arts organizations or unsure: Calgary (n=246), Alberta (n=703)



Knowing support positively impacts the survival of arts organizations has the greatest impact

Knowing this is important for messaging about needed support and it should focus on impacts of quality of life in the community including the local artists directly.



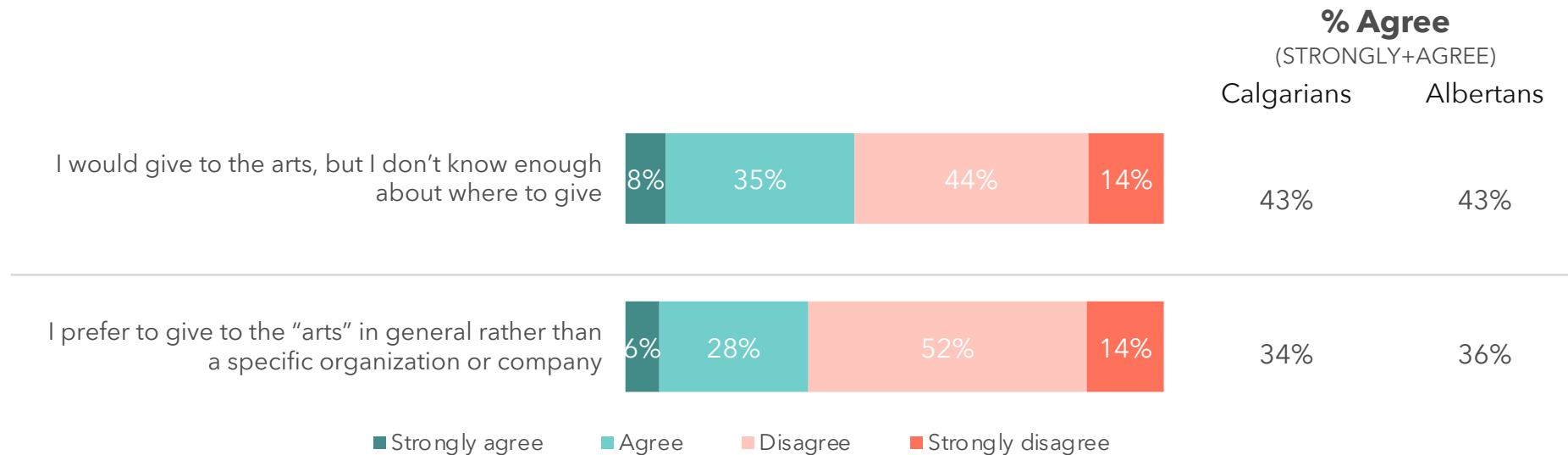
Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)

26. Below are ways arts organizations utilize support they receive. What impact, if any, does knowing each have on your decision to support an arts organization?



But Calgarians, and Albertans, lack knowledge about how or where to give to the arts

Providing general support to the arts remains unclear. Making it simple to support the arts when there isn't a direct link to attending a performance is critical for continued support.

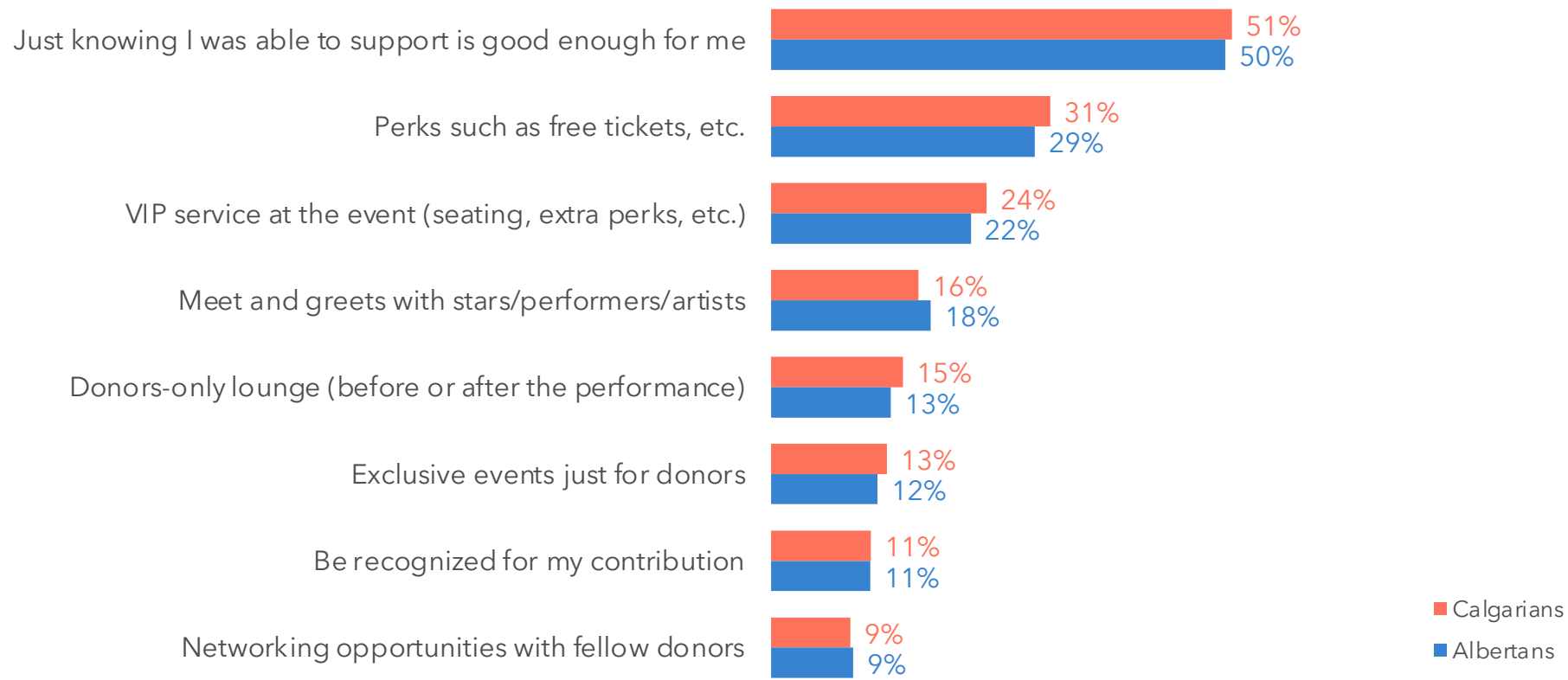




The donation itself is reason enough to support

Most Calgarians that support do so because they see a need and half of respondents indicate that would be sufficient for them. Still, perks and VIP services may tip the balance for some potential donors by creating a sense of exclusivity.

Perceived Benefits to Donating



Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)

Q27. And, suppose you made a donation to a specific arts organization. Aside from small monetary donations, what types of benefits would you expect to receive in return?

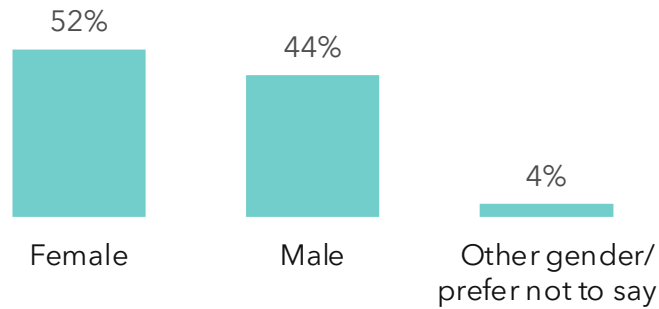


Respondent Profile

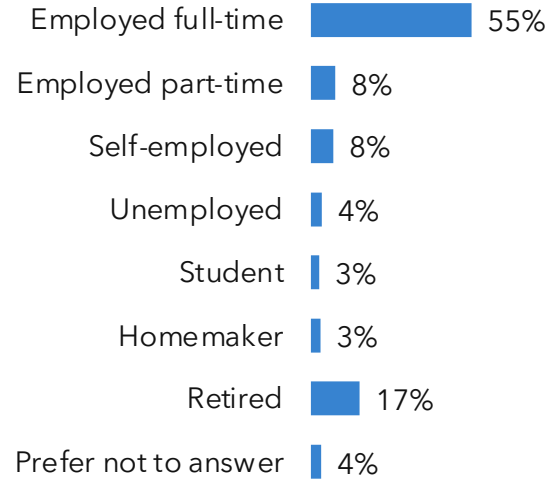
Respondent Profile: Who We Heard From



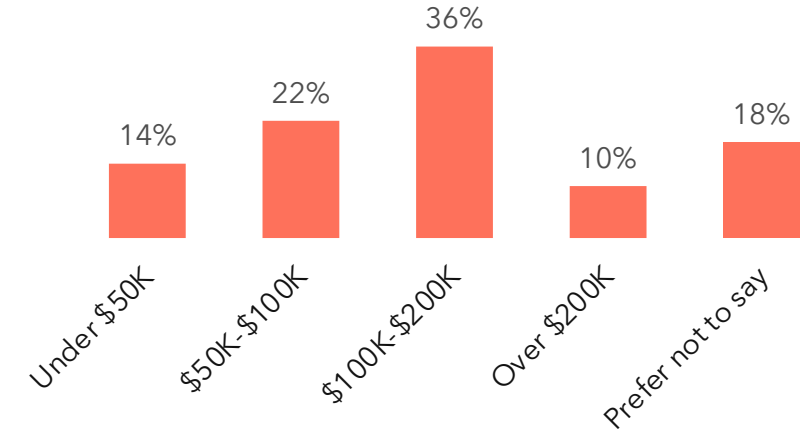
Gender



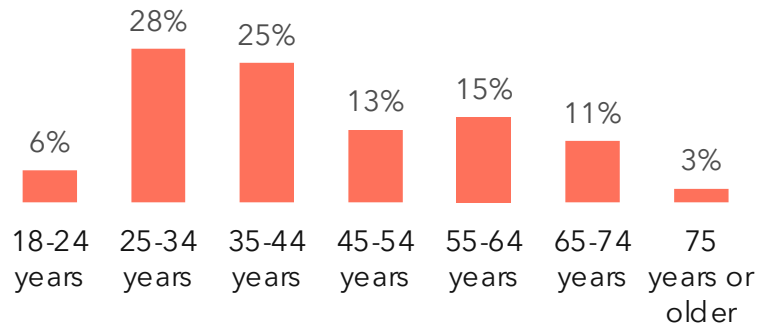
Employment



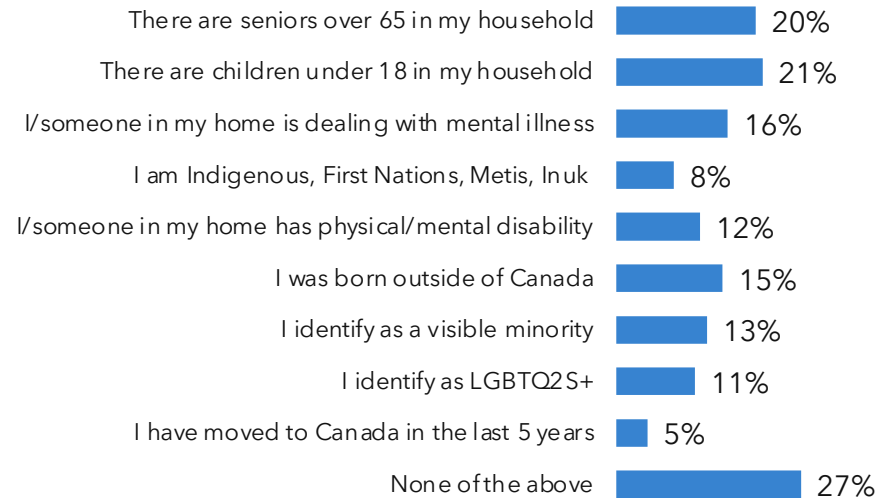
HH Income



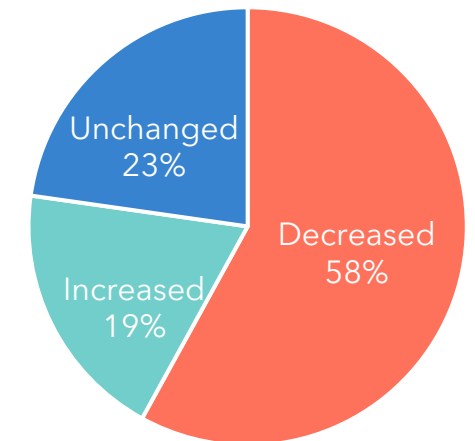
Age



Diversity/Identity



Income Change - Past 3 Years



Understanding people.

It's what we do.

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Questions or Comments?

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