

Spotlight on Arts Audiences

Wave 2: Spring 2024
Regional Alberta 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:

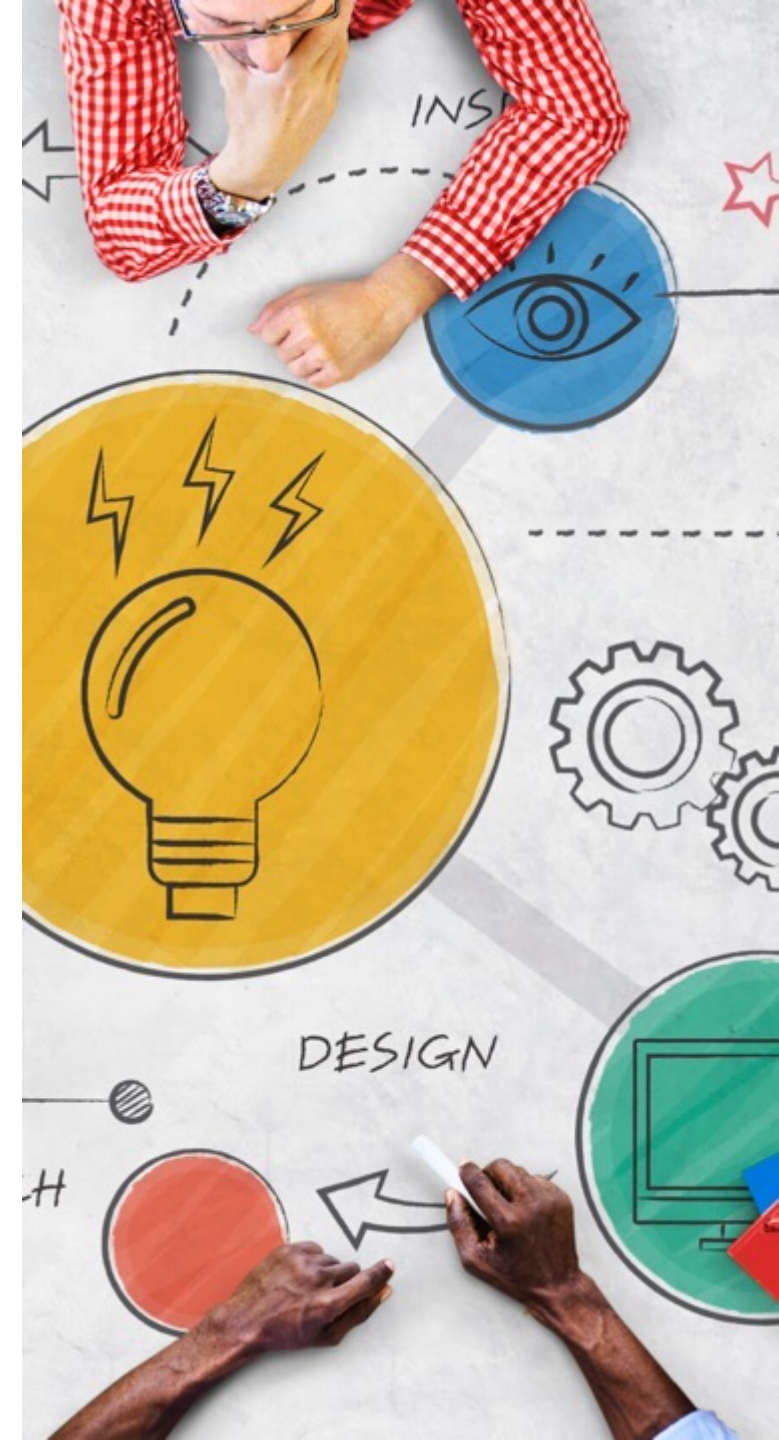
Alberta continues to be at a crossroads brought by a pandemic that has changed public life and re-shaped our economy. This is especially true in the arts sector which continues to experience a decline in engagement with events and activities. This work was developed for this sector exclusively. It builds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

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=120 is +/- 8.9% (which is not typically applicable for online non-probability samples).

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.



What is different outside of Edmonton and Calgary?

There are small differences noted. For example, Northern Alberta residents have a greater desire to see their own cultural groups represented (and they have a higher Indigenous representation in the survey). Regions outside Edmonton and Calgary also have slightly different priorities for giving and are more likely to believe that the arts are already well funded. Still, the themes already identified across the province are very much present and applicable. A summary of these 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 large crowd of people is shown from behind, participating in a colorful festival. Many individuals have their faces and clothing covered in bright, multi-colored paint splatters. Their arms are raised in the air, some holding up smartphones to capture photos or videos. The background is filled with thick, vibrant plumes of colored smoke or paint in shades of purple, pink, orange, and green, creating a dynamic and festive atmosphere.

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

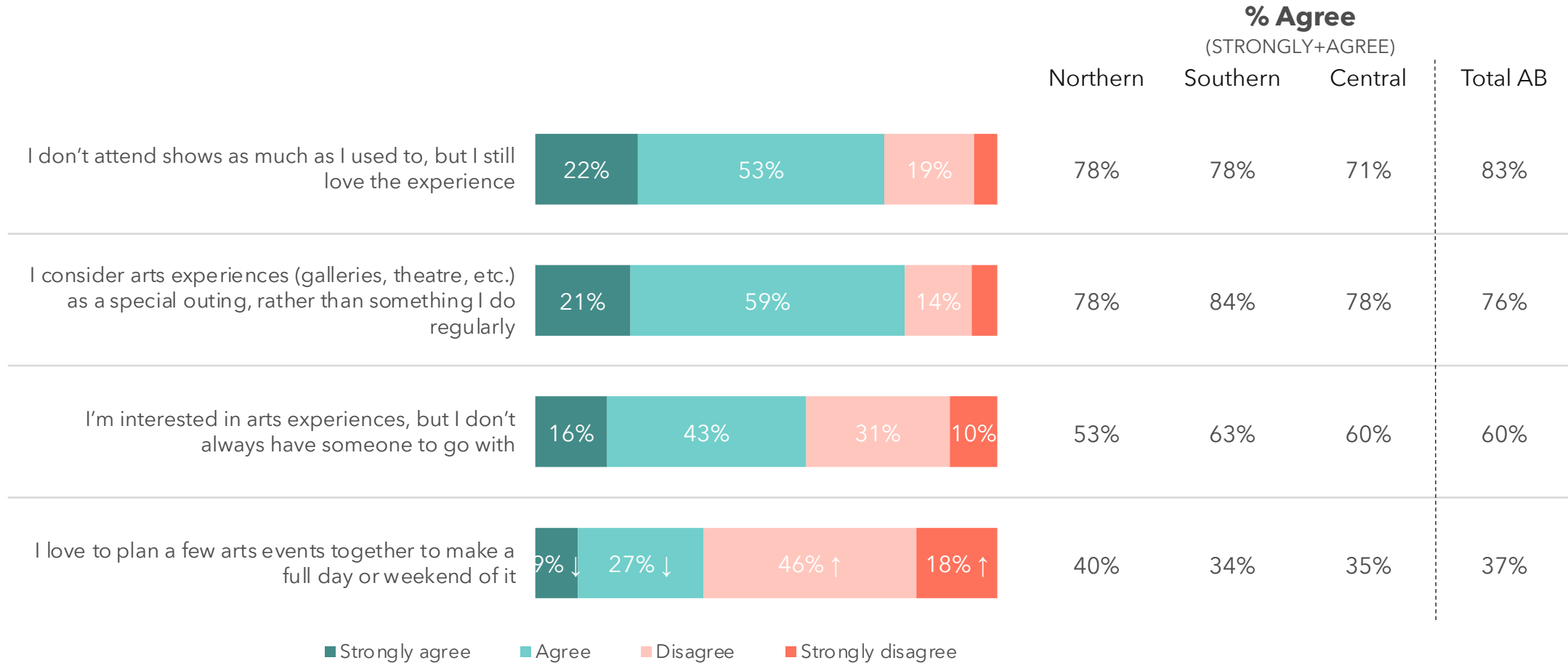
This group makes up the largest proportion of Albertans. Their engagement with the arts is **occasional** and they attend arts events, watch arts content or pursue arts experiences.

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.

Albertans across the province see arts experiences as a special outing

This sentiment is most pronounced in Southern Alberta.

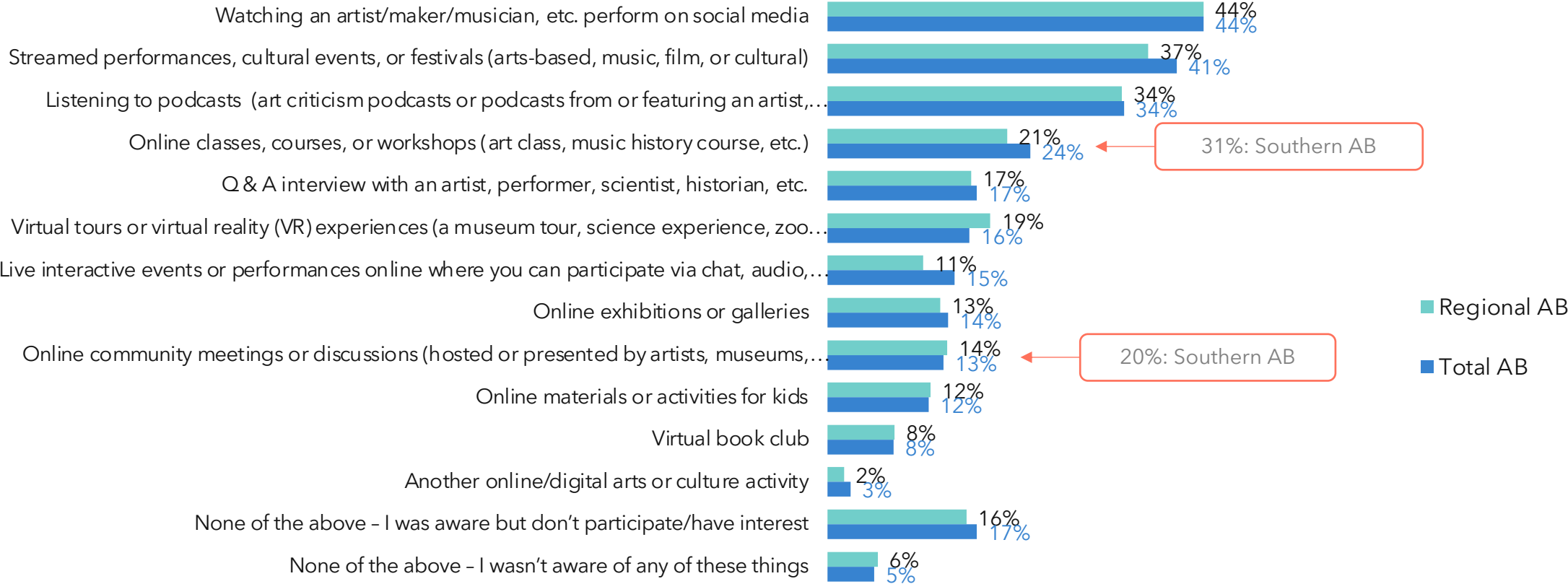


Is digital participation in the arts still prevalent?

In short, yes. Trends are very similar across the province. The only notable difference is Southern Alberta residents are slightly more likely to participate in online classes or workshops.



Digital Arts Related Activities - % Participation



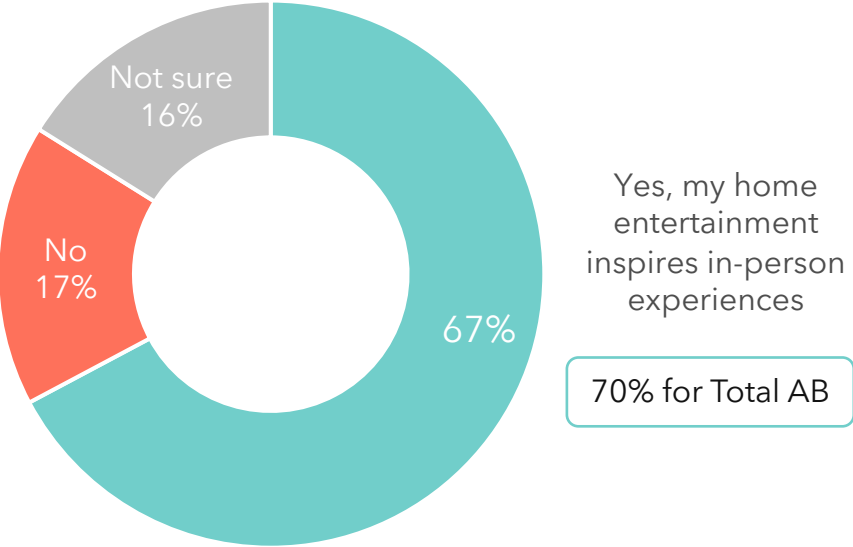
Base: Regional AB respondents (n=360), Albertan respondents (n=1,160)
 Q10. Thinking about arts-related activities specifically, which of the following do you participate in digitally? This might be via your computer, a streaming service, TV, mobile phone or tablet.

And at-home behaviour influences interest in live events

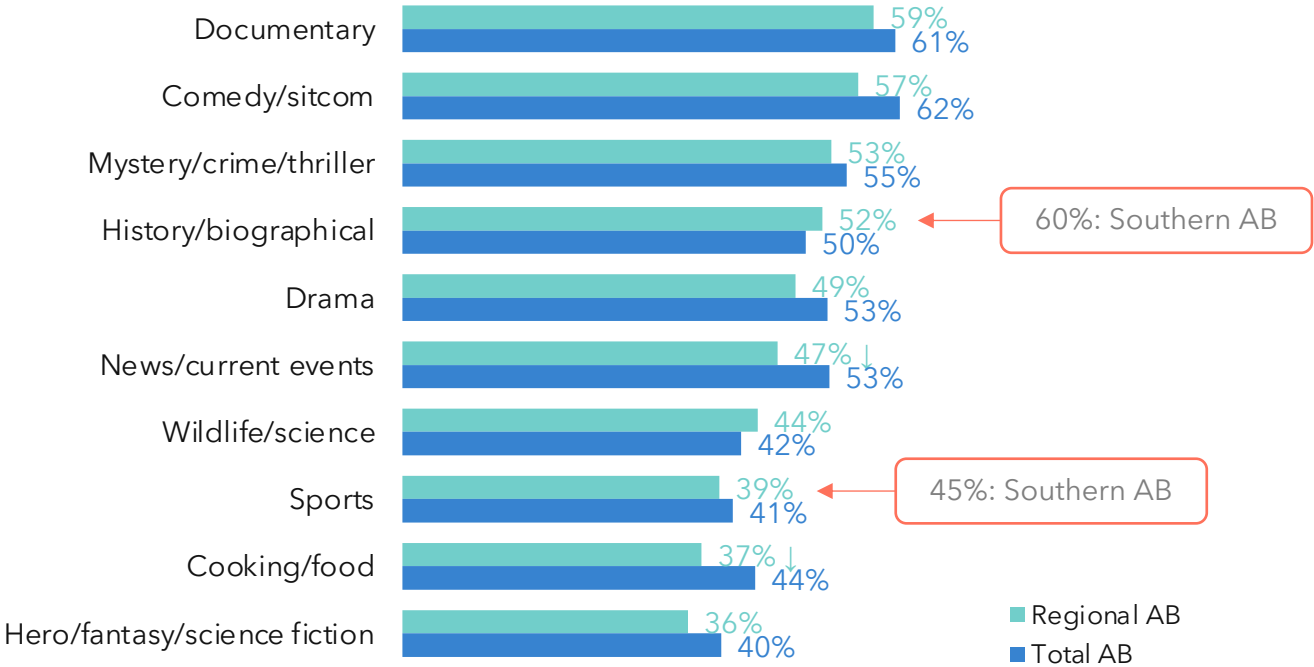
Since all Albertans (including those in city centres) may be inspired to attend live events based on what they enjoy in their home, it is important to understand at-home preferences. Interest in genres is similar across those who live outside of Calgary and Edmonton, but Southern Albertans enjoy history and sports content more than others.



At home entertainment impact on in-person experiences



% Genre - watch at home regularly (Top 10 genres Regional AB)



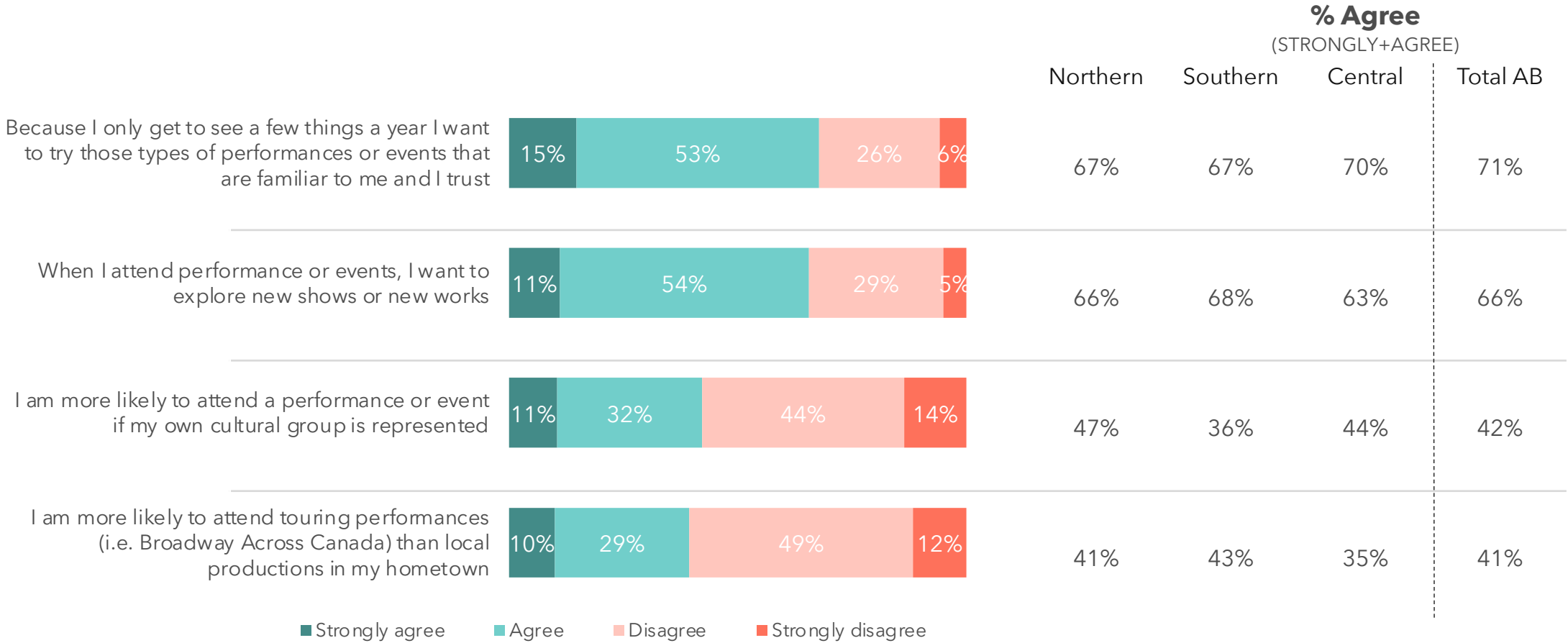
Base: : Regional AB respondents (n=360), Albertan respondents (n=1,160)
 Q11. At any point, has anything you've watched or listened to on TV, online or on the radio inspired you to think about live experiences you can see in person?
 Q8. When it comes to entertainment and media, what types of content do you regularly watch at home?

Content Preferences and Informing Programming



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

This is a common sentiment across the province and suggests that audiences are willing to experience a variety of works.



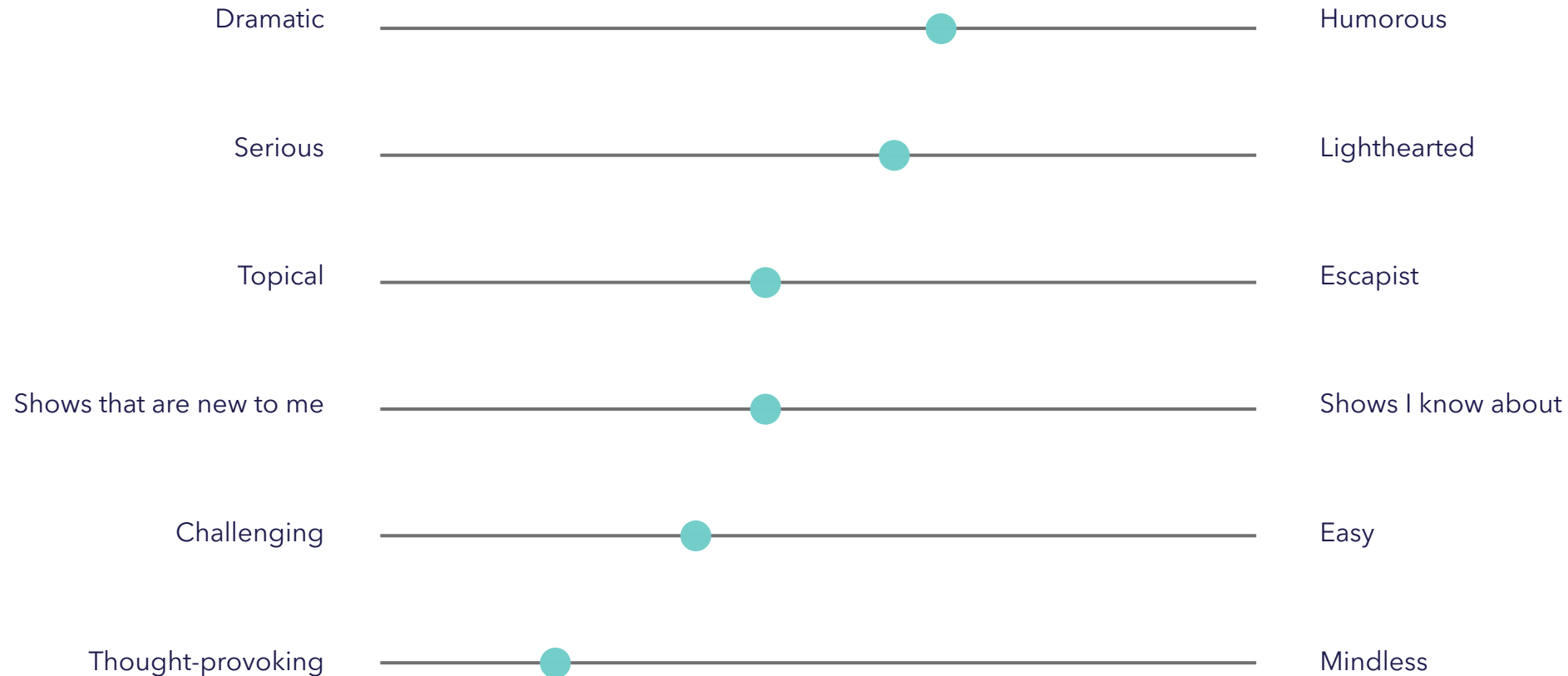
Base: Regional AB respondents (n=360), Albertan respondents (n=1,160)
 Q12. Here are some statements that some people make about what types of performances or events they like to experience. Please indicate your level of agreement with each statement

Content preferences for Albertans confirm a desire for variety

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.



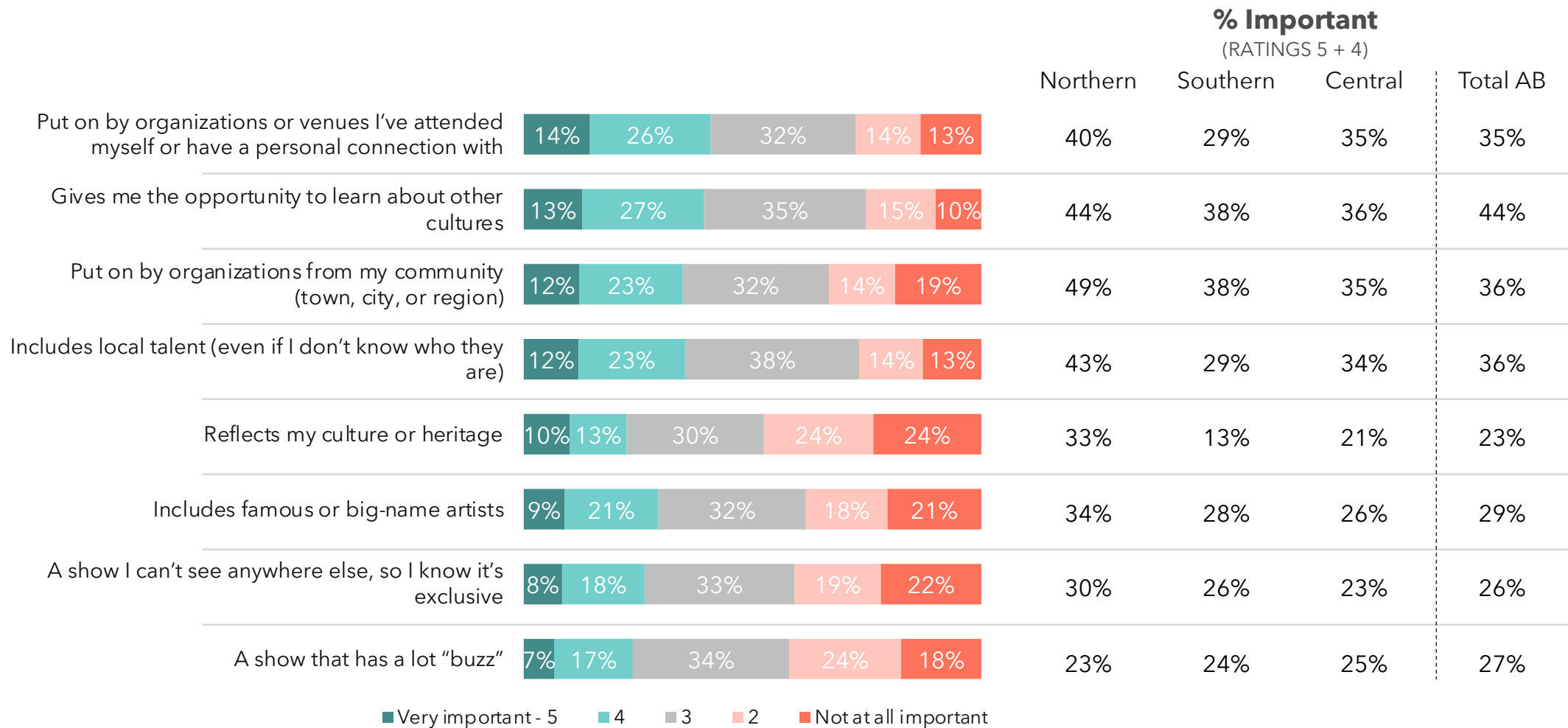
What do they want to see?



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



Northern audiences are keener to value local talent and local community organizations.



Base: : Regional AB respondents (n=360), 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?

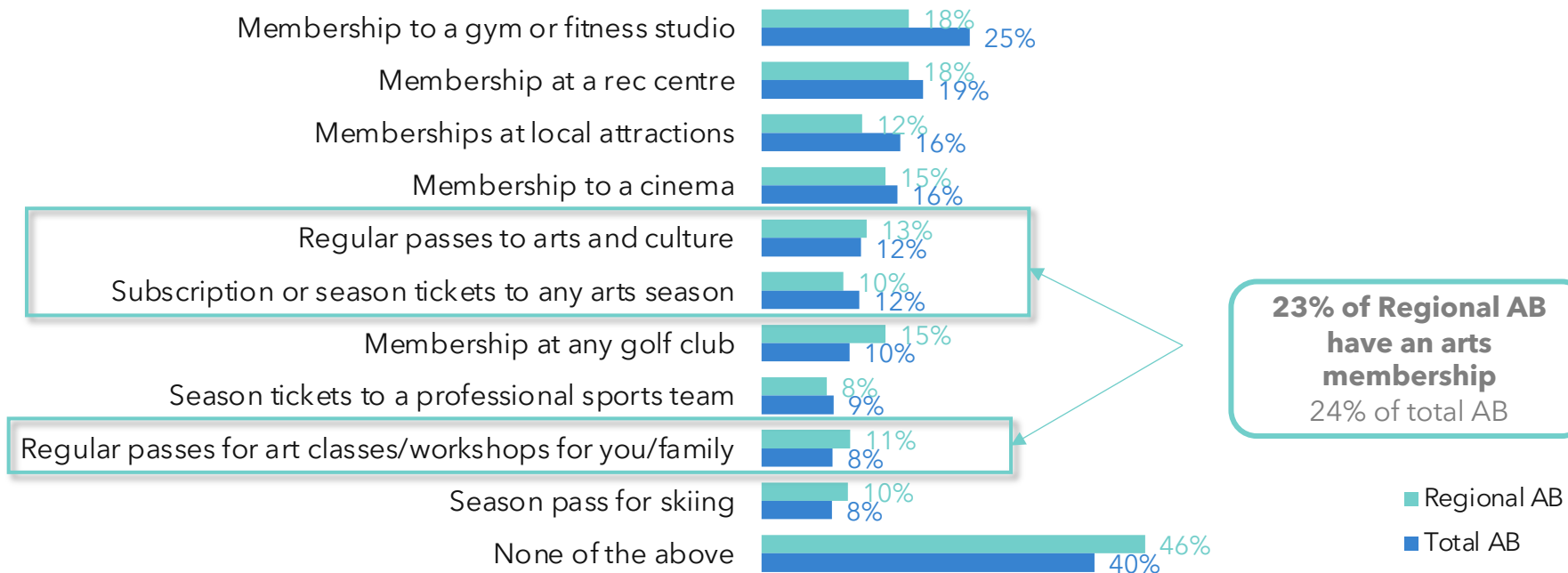
Memberships and Ticket Bundling Options

The category of memberships is quite consistent across Alberta



While the proportion who have an arts membership is consistent across the province, Albertans outside of Edmonton and Calgary are slightly less likely to hold memberships or subscriptions overall.

% Selected - Type of membership



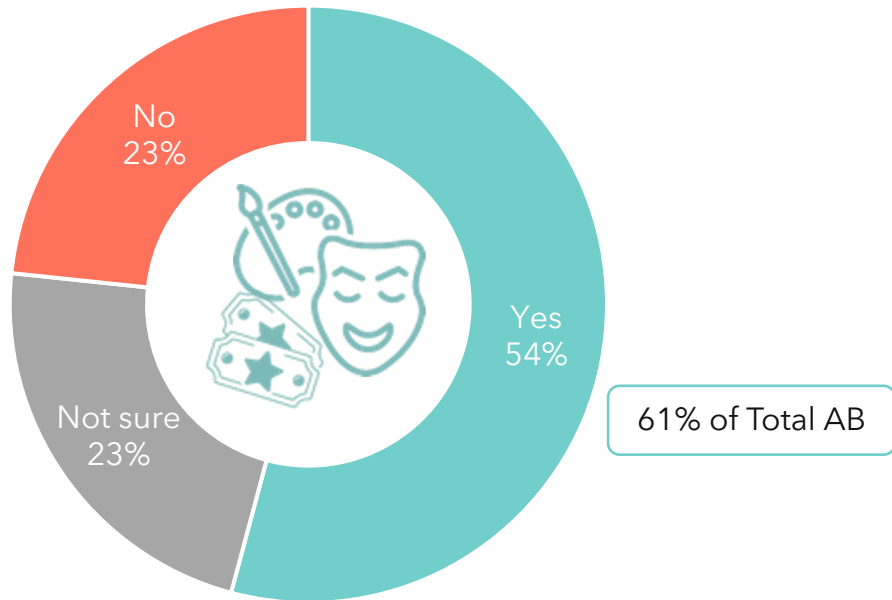
Base: Regional AB respondents (n=360), Alberta (n=1,160)

Q15. Looking at the list below, do you have a membership, subscription, season pass, or something similar to any of the following?

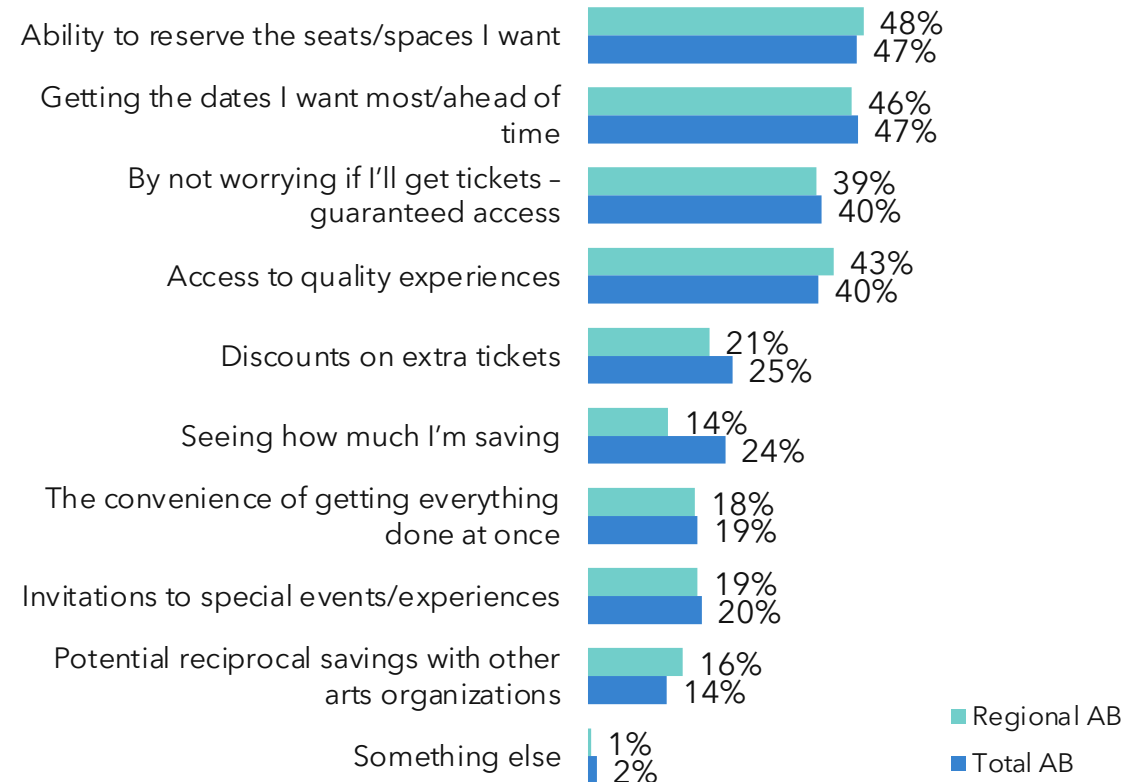


There is an opportunity for bundling ticket options for arts experiences, but consideration is slightly lower than in Edmonton and Calgary

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 Regional AB respondents (n=360), Albertan respondents (n=1,160)

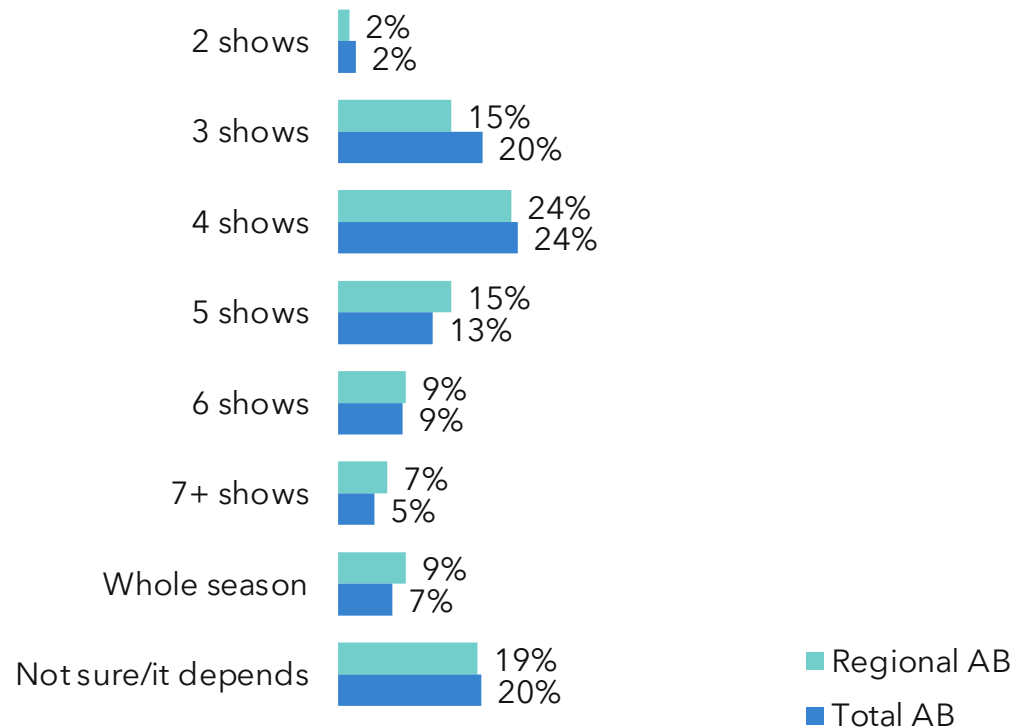
Q21. When you think about paying for this type of multi-show option, what benefits do you value most? Please select up to 3. Base: Regional AB - Would consider an art ticket bundle (n=195), Total AB - Would consider an art ticket bundle (n=707)



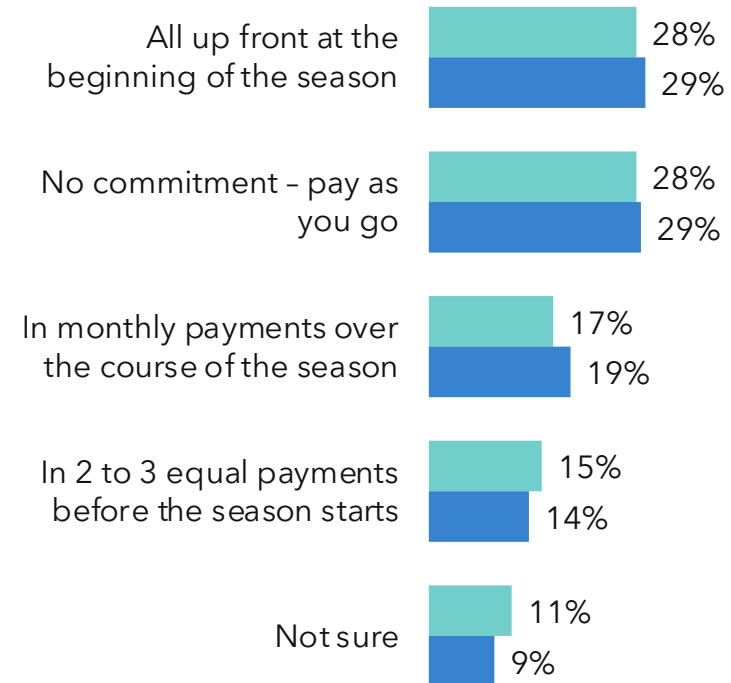
What makes up the ideal ticket bundle?

Overall, preference for the elements of a ticket bundle are similar across all of Alberta. It is important to note that 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 3-5 events*



Preference for payment *Payment preferences are split*



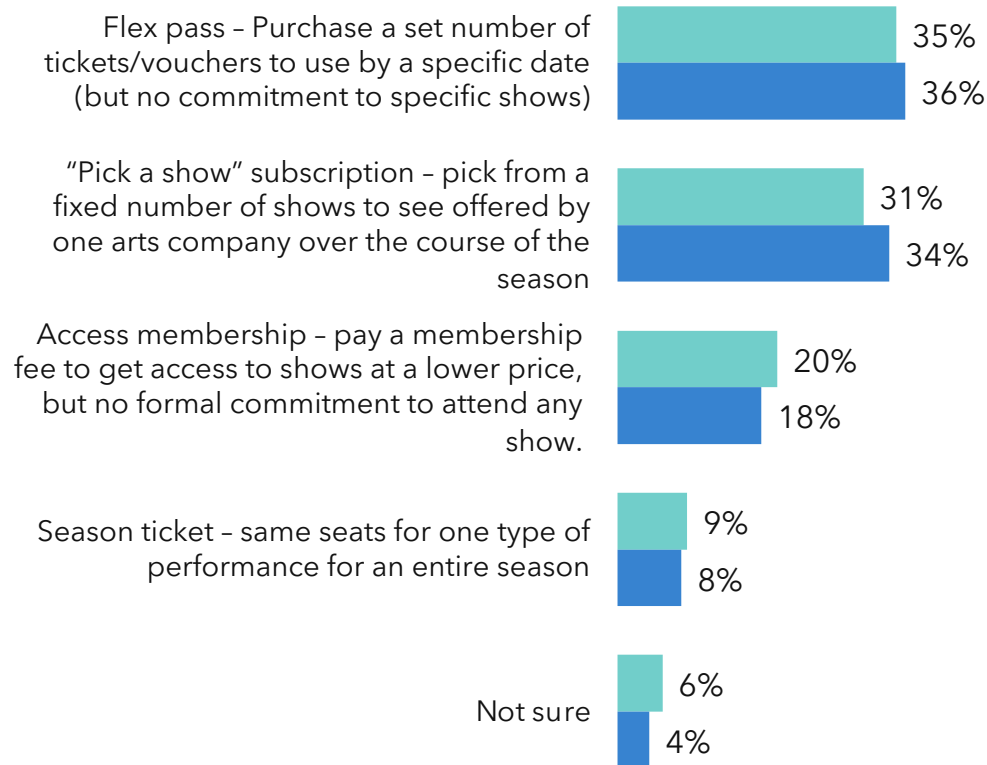
Base: Would consider an art ticket bundle: Regional AB respondents (n=195), Alberta (n=707)
 Q17. If you did commit to more than one performance, how many shows would you like to have access to?
 Q20. Given that this type of commitment beyond one show, how would you most prefer to pay for this?

The ability to have choice is most preferred

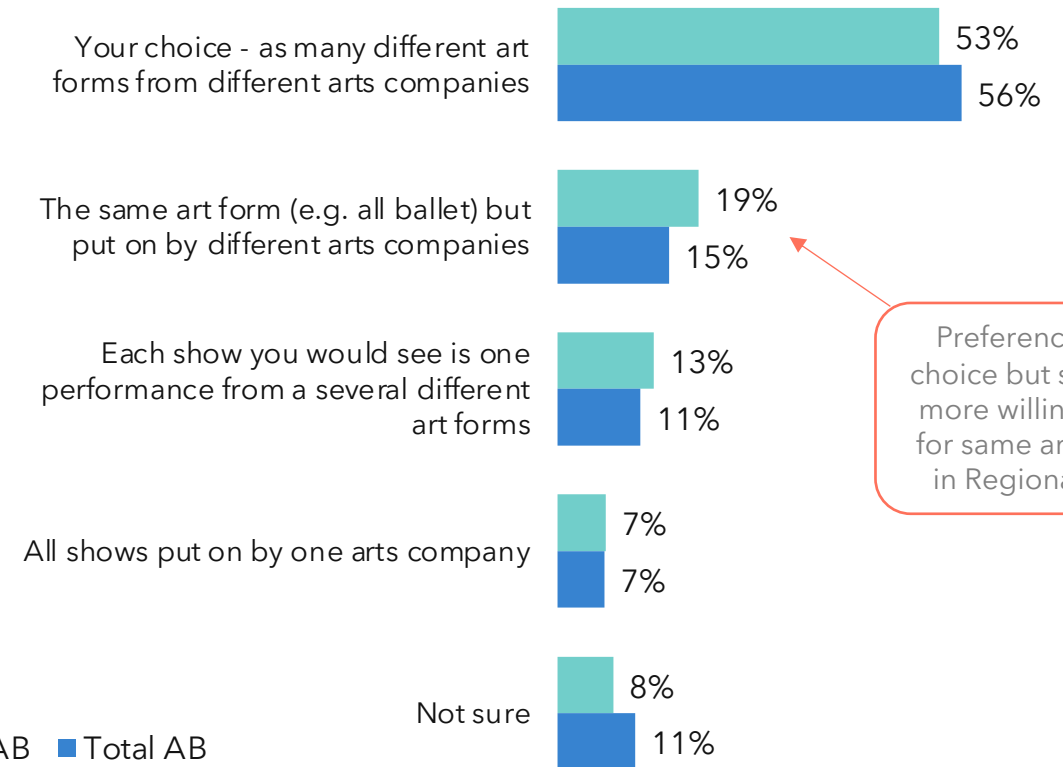
Choice also reflects flexibility. And when arts experiences are a special outing, the ability to have a flexible array of options to choose from might be more appealing to audiences.



Bundling preference *Flex options*



Types of experiences *Different art forms and different companies*



Preference for choice but slightly more willingness for same art form in Regional AB

Base: Would consider an art ticket bundle: Regional AB respondents (n=195), Total AB (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?



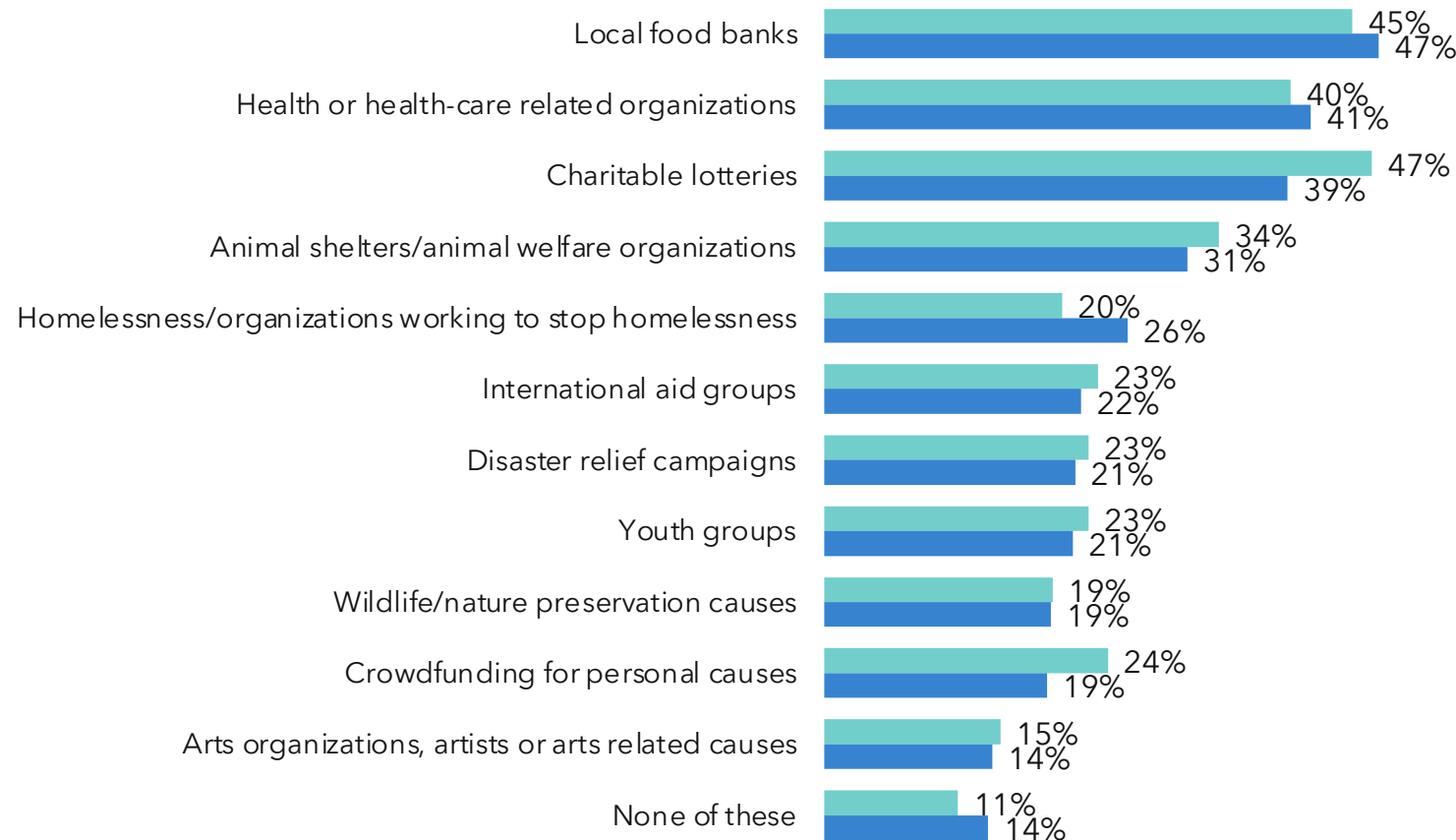
Understanding support for the arts

Charitable lotteries, food banks, and health are top causes outside Edmonton and Calgary

But like the rest of the province, arts related causes are less of a priority than other causes 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).

■ Regional AB ■ Total AB

There are differences by region in terms of causes supported

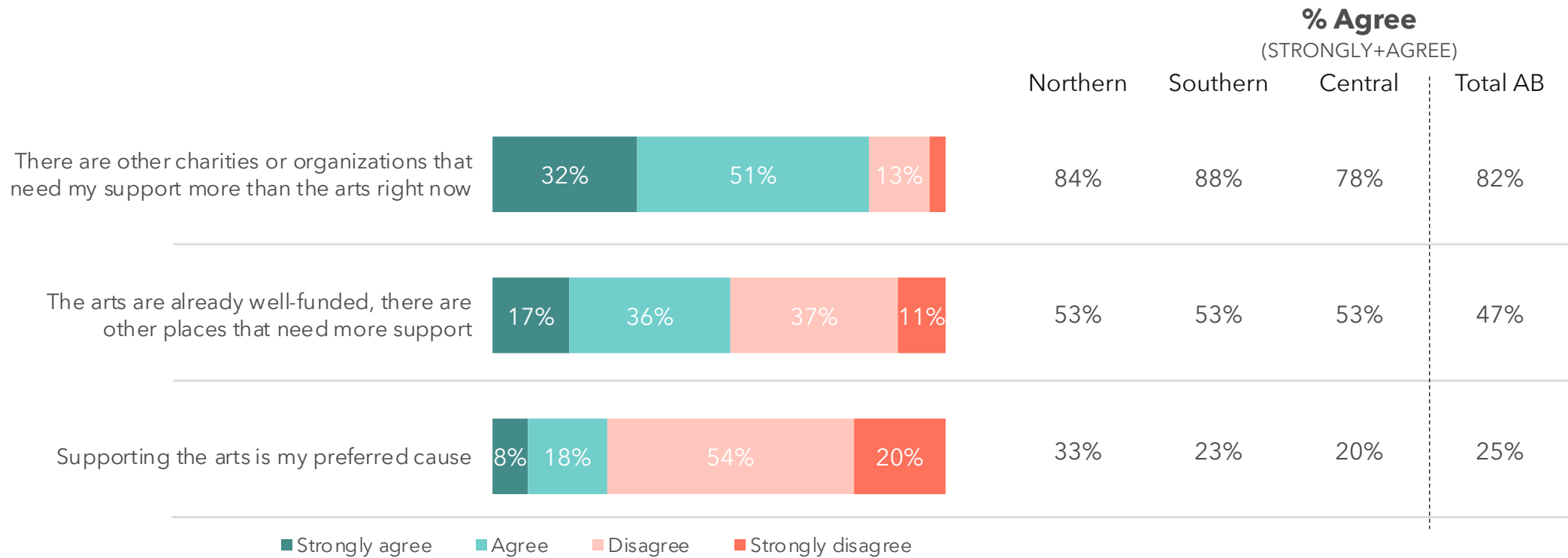


% Selected	Region			
	Regional AB (n=360)	North (n=120)	South (n=120)	Central (n=120)
Charitable lotteries (STARS Lottery, hospital lotteries, etc.)	47%	47%	50%	43%
Local food banks	45%	54%	40%	41%
Health or health-care related organizations (cancer societies, hospital foundations, etc.)	40%	48%	38%	33%
Animal shelters/animal welfare organizations	34%	39%	30%	32%
Crowdfunding for personal causes (medical treatment, supporting a family in need)	24%	26%	27%	20%
International aid groups (amnesty, Red Cross, UNICEF, etc.)	23%	28%	24%	18%
Disaster relief campaigns (such as for natural disasters or other significant events)	23%	24%	23%	21%
Youth groups (Girl Guides or Scouts, church choirs, Boys and Girls Club, etc.)	23%	30%	23%	15%
Homelessness/organizations working to stop homelessness (Homeward Trust, The Alex, drop-in centre, CUPS, etc.)	20%	24%	15%	22%
Wildlife/nature preservation causes	19%	19%	21%	18%
Arts organizations, artists or arts related causes	15%	18%	14%	13%
None of these	11%	5%	13%	17%

Base: Regional AB (n=360),
Q22. Shifting topics, do you or anyone in your household make donations to causes in any of the following areas?



There is stronger agreement in regions outside Edmonton and Calgary that the arts are already well funded



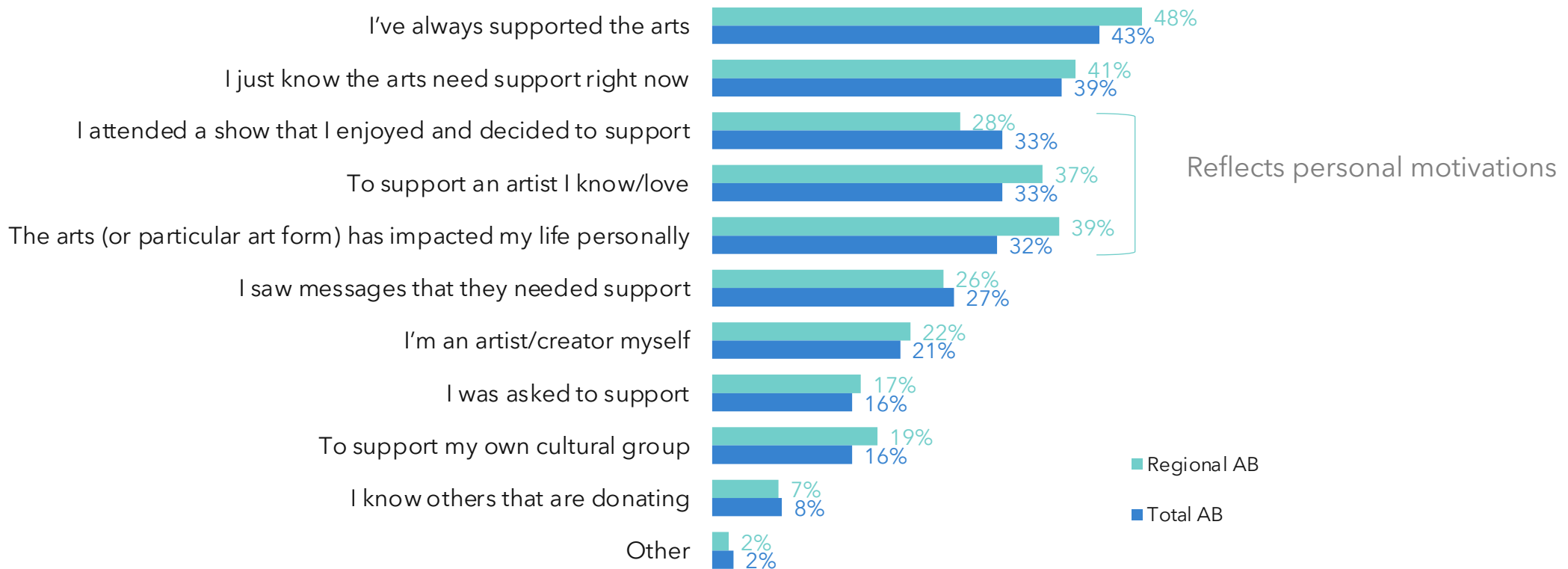
Base: Regional AB (n=360), Total AB (n=1,160)
Q28. Below are a few statements about supporting the arts. Please indicate your level of agreement with each.



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

Personal relevancy continues to be an important motivator, and one arts organizations can leverage to grow support. Specifically, leveraging the impact on their life personally and supporting an artist they are connected with more so than Calgarians and Edmontonians.

Reasons for support arts organizations



Base: Have supported arts organization Regional AB (n = 54), Total AB (n=166)

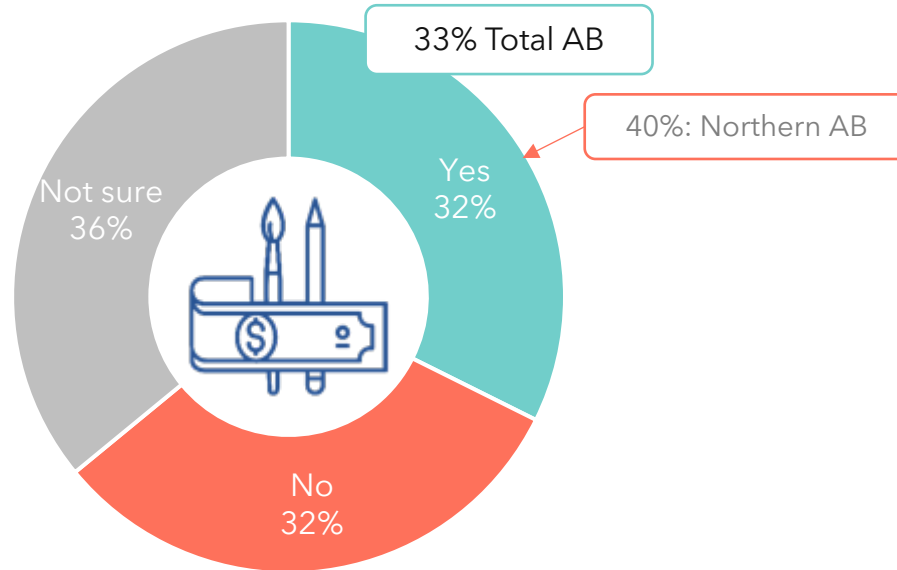
Q25. You mentioned you have donated to an arts-based organization. Tell us what prompts you to support an arts-based organization. You can select as many reasons as you need.

A third of Albertans outside Calgary and Edmonton are willing to consider donating to the arts

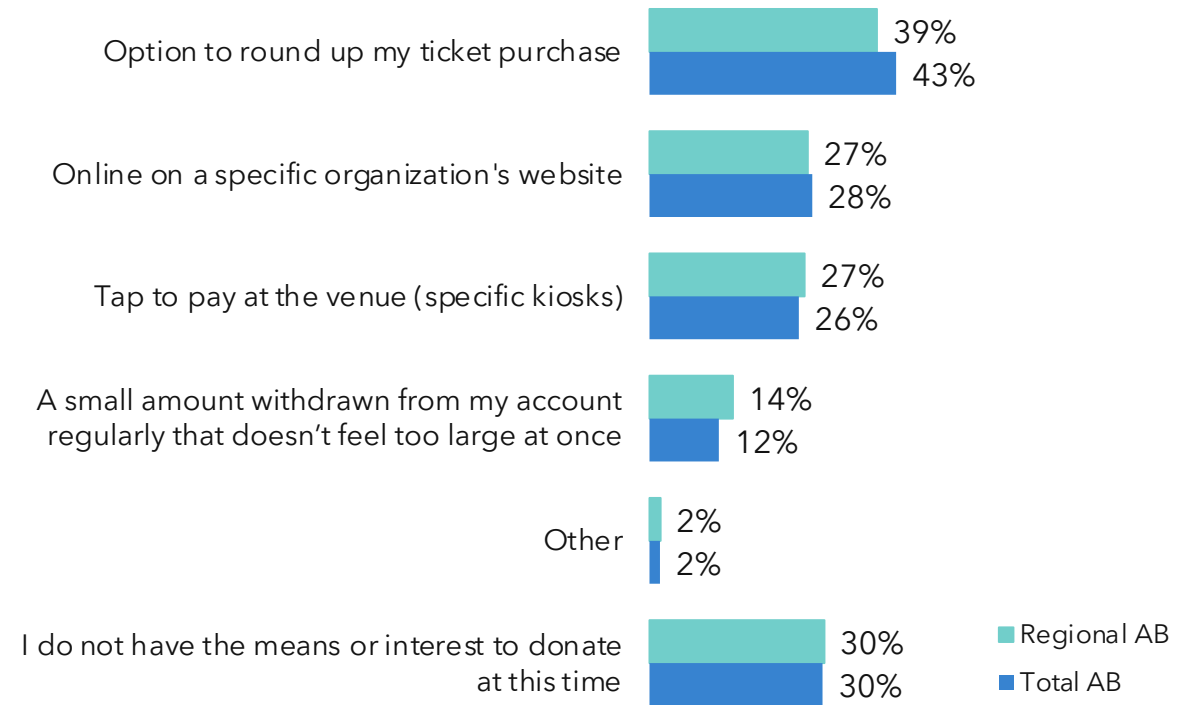


But conversion will still be a challenge to encourage donations from those who do not already donate to the arts. Methods to foster smaller donations include rounding up ticket purchase or website options.

Arts Support Consideration



Preferred Method of Donation



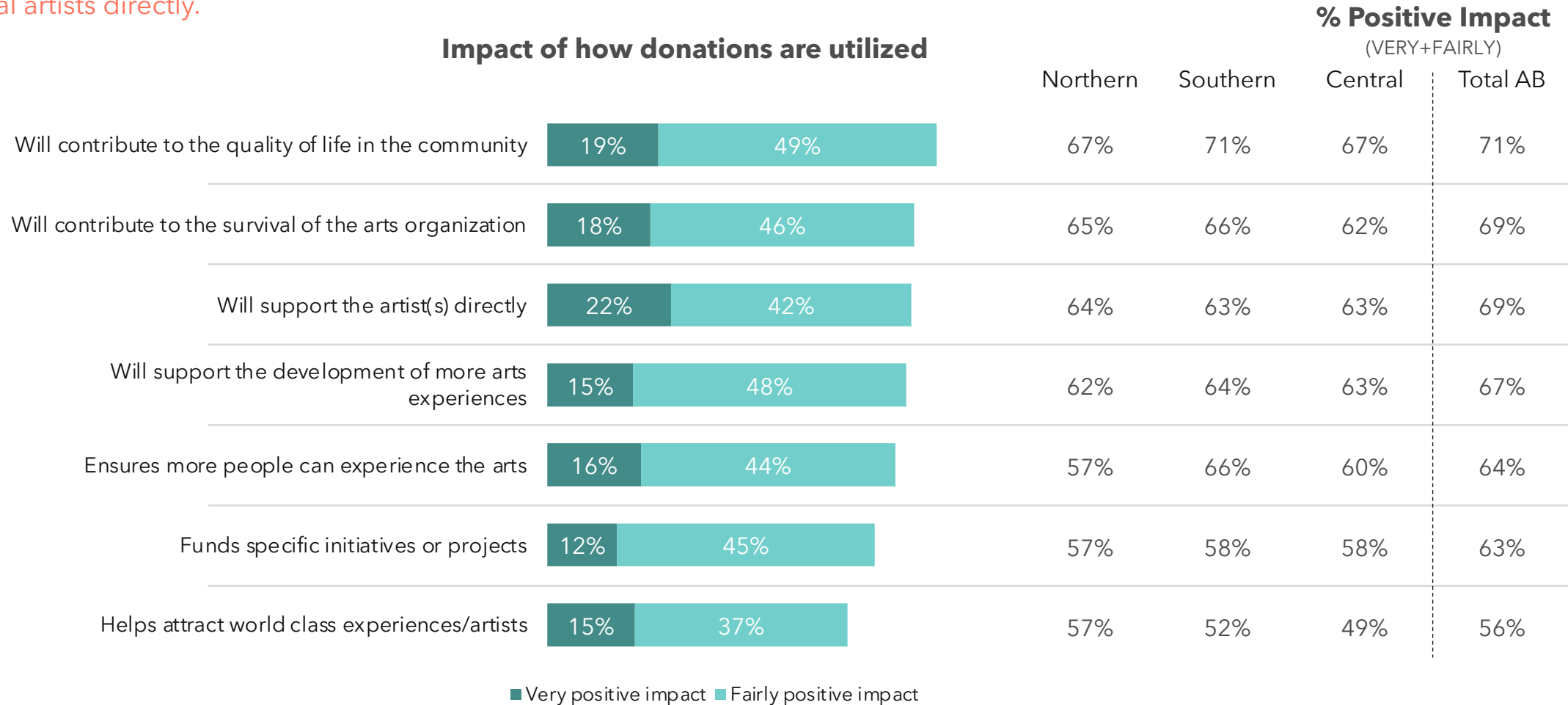
Q23. Would you ever consider donating money to show financial support for an arts organization, artist or related cause? Base: Household doesn't currently support arts organizations: Regional AB (n=306), Total AB (n=994)

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, Regional AB (n=209), Total AB (n=703)

Knowing support positively affects the community will likely have the most impact



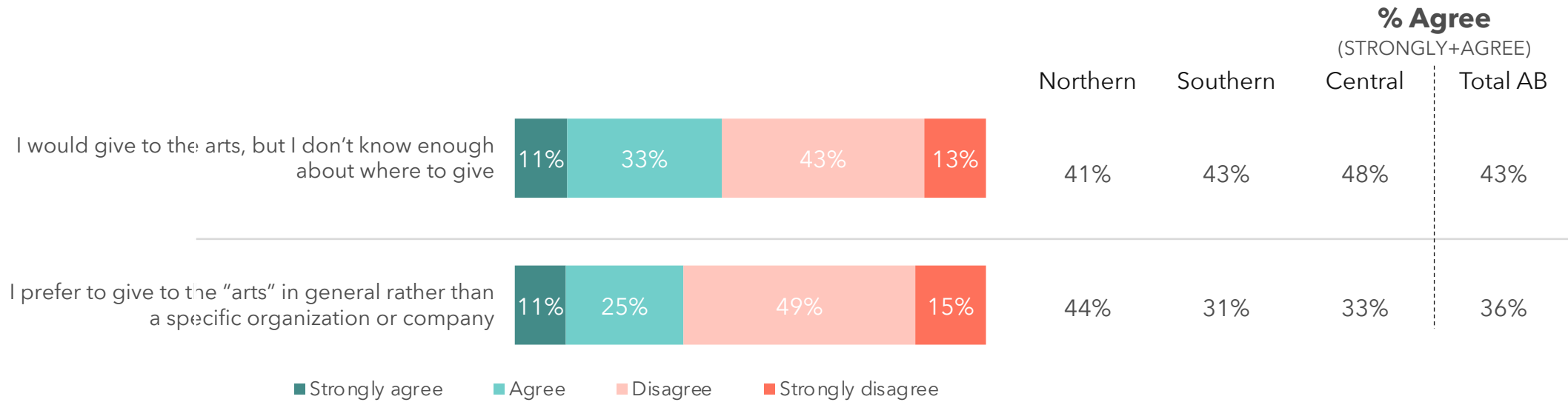
The sentiment is similar across Alberta and knowing this is important for messaging about needed support and it should focus on impacts of quality of life in the community including the local artists directly.



Base: Regional AB (n=360), Total AB (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?

Those in regions outside Edmonton and Calgary lack knowledge about how or where to give to the arts

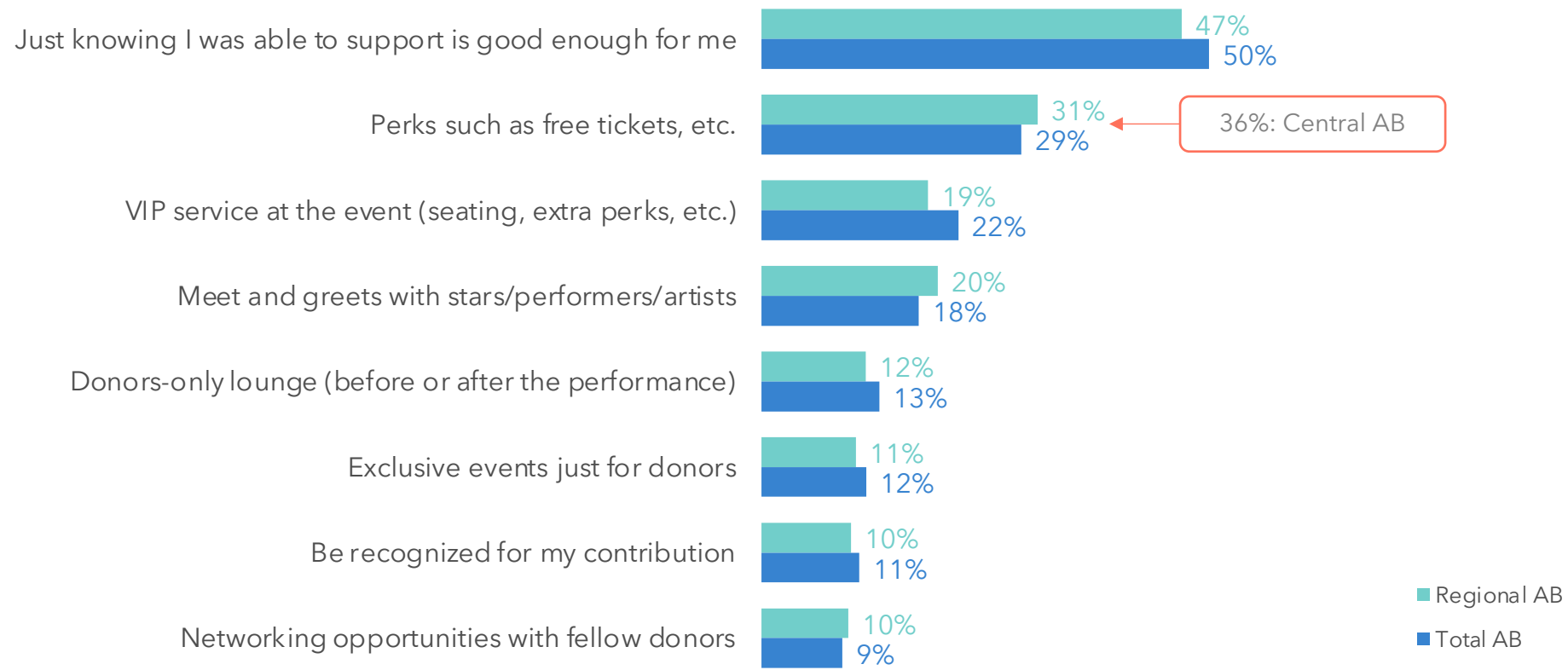




The donation itself is reason enough to support

Similar to Edmonton and Calgary, most that support indicated they don't need additional perks or benefits for donating. Although those in Central Alberta are slightly more likely to expect free tickets in return for donating.

Perceived Benefits to Donating



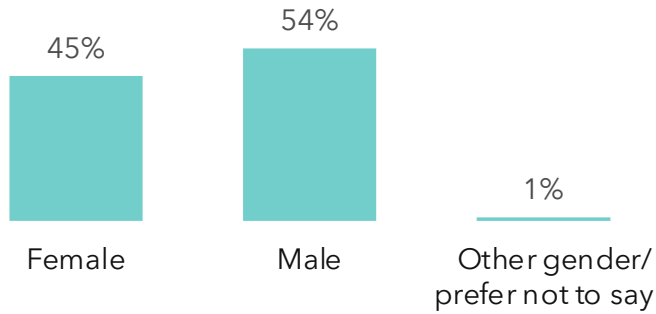


Respondent Profile

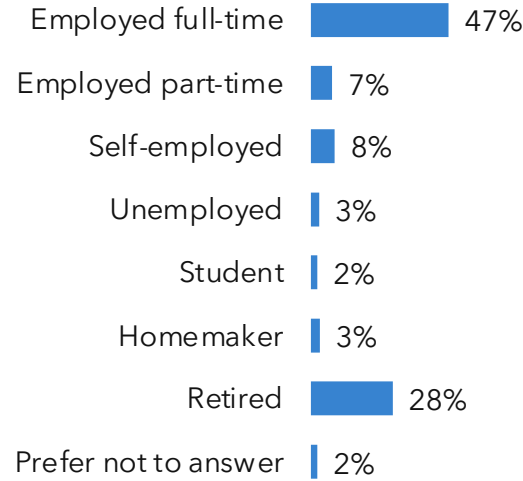
Respondent Profile: Who We Heard From



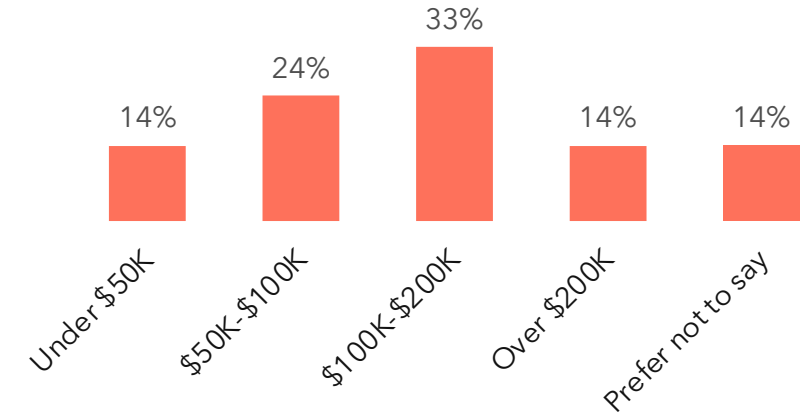
Gender



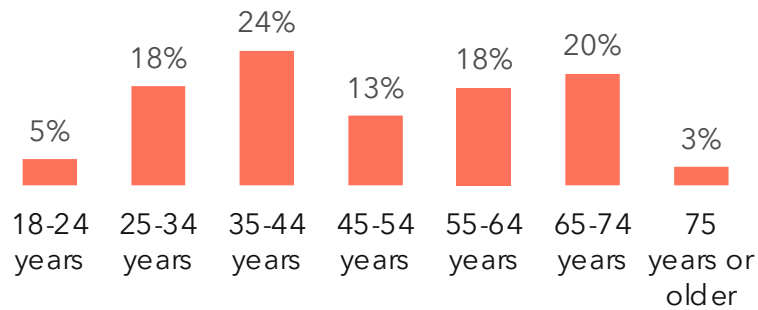
Employment



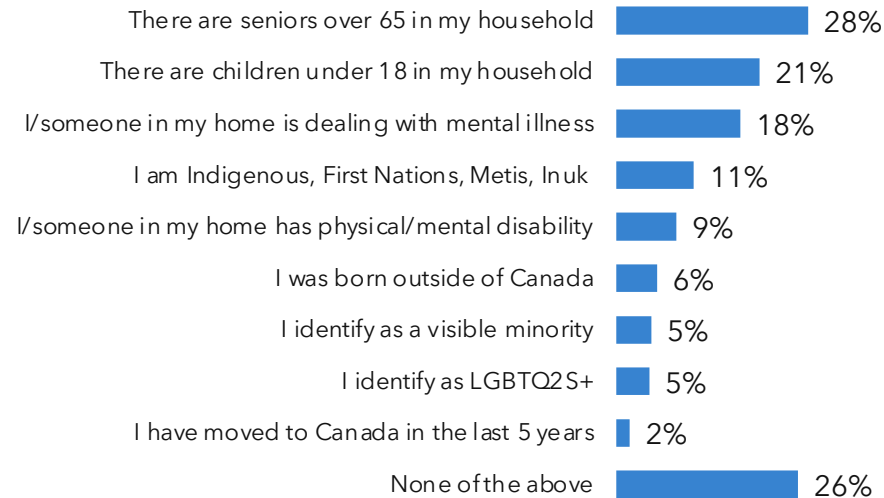
HH Income



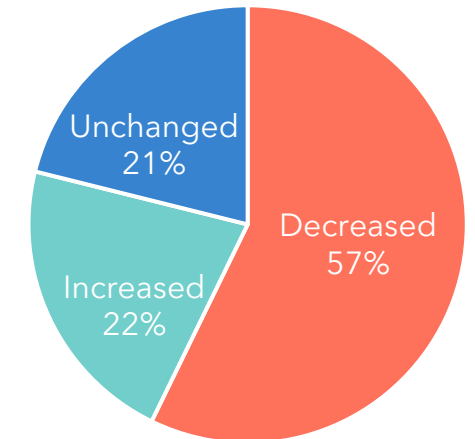
Age



Diversity/Identity



Income Change - Past 3 Years



Respondent Profile: Breakdown by individual region



% Selected			
	North (n=120)	South (n=120)	Central (n=120)
DIVERSITY/IDENTITY			
I am Indigenous, First Nations, Metis, Inuk (Inuit)	26%	13% ↓	23%
I identify as a visible minority	4%	6%	5%
I identify as LGBTQ2S+	3%	8%	3%
I was born outside of Canada	5%	6%	7%
I have moved to Canada in the last 5 years	3%	2%	1%
There are seniors over 65 in my household	29%	28%	25%
There are children under 18 in my household	21%	15%	18%
I or someone in my home has a physical or mental disability	7%	12%	15%
I or someone in my home is dealing with a mental illness	6%	12%	8%
None of the above	23%	26%	29%
AGE			
18-34	14% ↓	33% ↑	20%
35-54	43%	28%	39%
55+	43%	38%	41%
GENDER			
Female	29% ↓	54%	52%
Males	68% ↑	46%	47%
Transgender/Non-Binary/Other genders	3%	0%	1%

Understanding people.

It's what we do.

**Stone —
Olafson**

Questions or Comments?

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megan@stone-olafson.com