Stone — Olafson

Spotlight on Arts Audiences

Wave 3: Summer/Fall 2024

Edmonton results

Table of contents

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.

ROZSA FOUNDATION

EDMONTON COMMUNITY FOUNDATION

CALGARY FOUNDATION FOR COMMUNITY, FOREVER

edmonton arts council

calgaryarts development

Alberta Foundation for the Arts

A collaborative and evolving resource:

Purpose & Objectives:

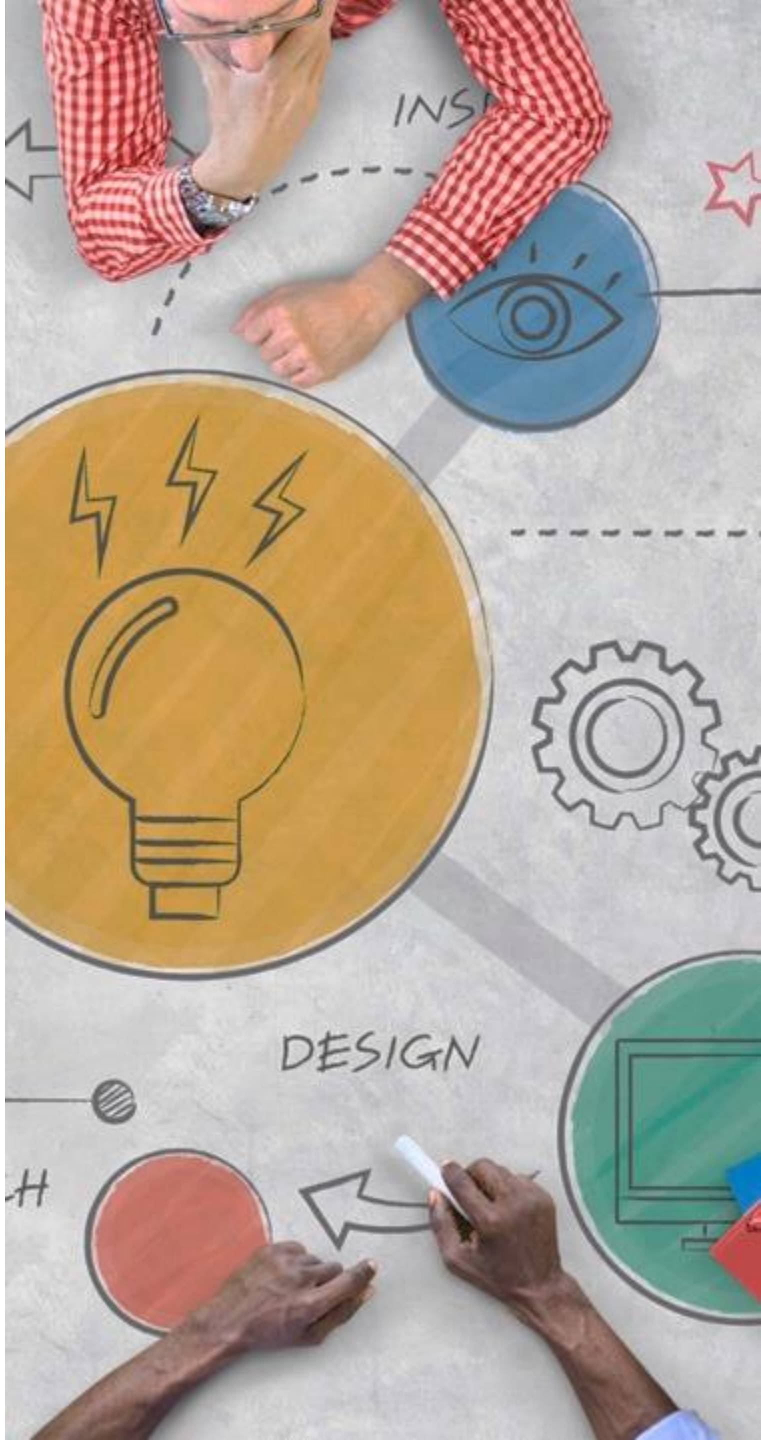
Alberta continues to be at a crossroads brought by a pandemic that has changed public life and re-shaped our economy. This is especially true in the arts sector which continues to experience a decline in engagement with events and activities. This work was developed for this sector exclusively. It builds 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 3:

- Assess interest and engagement with arts related education opportunities
- Understand spending habits and how they've altered
- Identify current barriers to last minute engagement
- Understand ad hoc decision variables

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 third 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 August 5th – 15th, 2024.

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

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.

Stone — Olafson

A reminder of what we’ve learned so far

First, not all audiences will engage in the same way or to the same degree…….

IMMERSED: The **most active,** eager, and supportive.

ENGAGED: They are **active but not as enthusiastic**.

PASSIVES: They will need to be **inspired to engage more**.

INFREQUENT: They may be interested but **rarely** engage.

Inspiring more engagement requires widening our reach to audiences who need to understand experiences in more personal and emotional terms.

1. **Promises of emotional benefits** are key to garnering greater investments of time and dollars. Edmontonians indicate they are the most constrained for time.

2. In a market with less time, success is likely to hinge **deepening connections** with those who are already engaging and **widening reach** to inspire attendance from passive audiences.

3. The journey to a special live experience starts at home. Audiences are not after empty experiences. They **want to see themselves in the activity**. Help them see it.

4. Some form of subscription has a future – it just doesn't look like what it used to. The market **craves flexibility**. Consider ways to meet their expectations **by providing choice**.

5. Philanthropic support will be a challenge but not impossible. **Evolve messages** past the personal motivations which drive support now. Show impact, create urgency, make it easy.

What is different in Edmonton this fall?

In short, very little! Arts-interested individuals across Alberta have very similar behaviours and motivations when it comes to arts education, spending on discretionary activities, and making last-minutes decisions. Similar to last wave, there are very few regional differences this wave. A summary of what we learned is below:

1. **Communicate the 'fun' factor for greater engagement.** Promotions for arts activities are often focused on learning and development. While self-development and personal growth are indeed key benefits of participation, this may not be enough to get Edmontonians through the door. The primary reason(s) adult Edmontonians participate in arts activities are overwhelmingly related to fun, social, and entertainment. Communication efforts should be focused on entertainment and uniqueness factors first, and that skill development simply comes along as an added benefit of participation.

2. **Show value to compete with other entertainment options.** The cost of living remains a top issue both nationally and provincially. On a local level, we learned that 52% of Edmontonians feel they are "just getting by" financially or "falling behind"—a figure slightly higher than that of the rest of the province. However, the good news is that Edmontonians have a propensity to spend and are not necessarily focused on cost alone. Instead, they consider the experiences or activities available to them and then decide what fits into their somewhat flexible budgets. This serves as a strong reminder that organizations must demonstrate their worthiness of Edmontonians' time and money by making experiences easy, attractive, social, and timely.

3. **Decisions are shared, just like experiences.** Findings show that only a small number of experience decisions are actually made impulsively. Most decisions are made more than a week before an activity, and the process of deciding is typically a shared task. While some individuals may take the lead in researching options, the vast majority share the final decision with others in their household. Because the commitment to participate is a collective decision, organizations must continually emphasize the shared benefits, such as having fun together, enjoying unique experiences, and learning together.

4. **Cost is not the only barrier; addressing the hassle factor is also essential.** Not surprisingly, cost is the most frequently mentioned reason for not engaging, but it is rarely cited as the sole reason (less than 1%). Although it is part of the equation for many, the "hassle" factor is a significant consideration as well. The importance of making engagement easy—and demonstrating how simple it is to participate—has not diminished, and organizations must also ensure that potential participants feel comfortable, especially if they are uncertain.

Stone — Olafson

Engaging in Arts Education

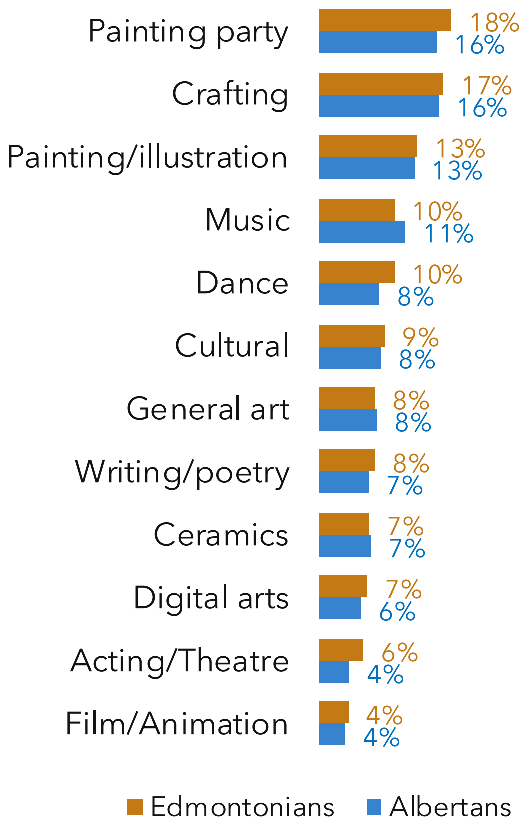
Children participate in more than double the number of classes/workshops than adults.

However, children in Edmonton participate at a slightly lower rate than children in the rest of the province.

Class/workshop participation - % participated in the past two years

Personal participation

2.4 average classes/workshops

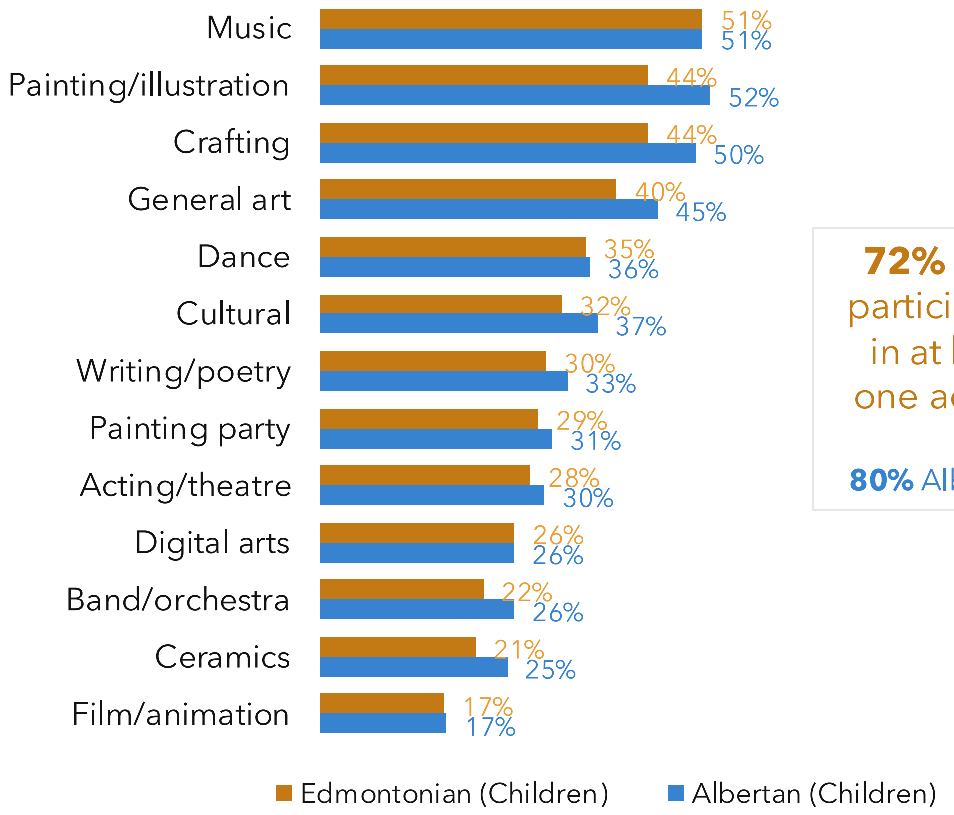


48% have participated in at least one activity

46% Albertans

Child participation

5.8 average classes/workshops



72% have participated in at least one activity

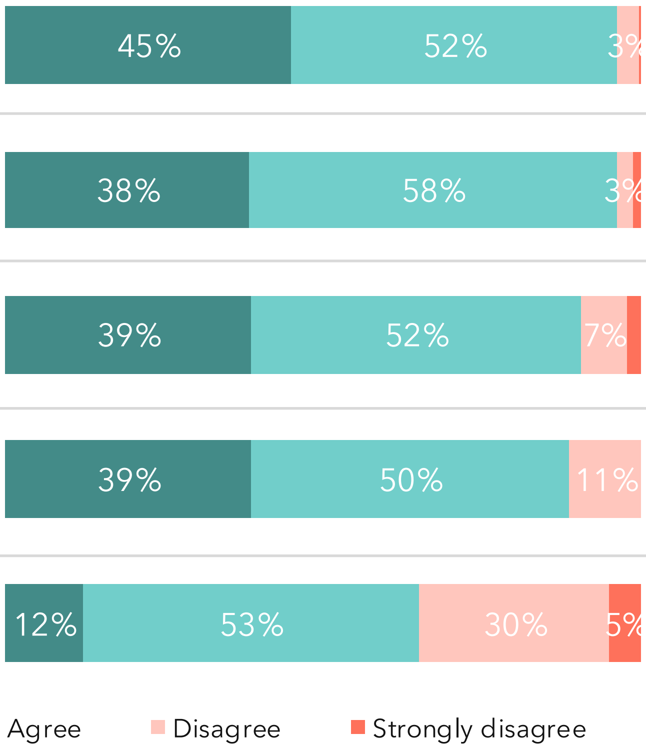
80% Albertans

Q11. Which of the following have you personally done in the last two years? Base: Edmontonian respondents (n=400); Albertan respondents (n=1,160)
Q13. How about for your children? Have they participated in any of the following within a school setting or outside of school in the past two years? Base: Have children under 18 in household – Edmontonian respondents (n=96); Albertan respondents (n=303)

There are strong benefits to engaging with arts education.

Edmontonians hold a view similar to that of the rest of Albertans regarding arts education, although they agree slightly more than other Albertans that arts experiences facilitate a cultural connection.

Perceptions of arts education on personal/child development



Statement	% Agree (STRONGLY+AGREE) Edmontonians	Albertans
Developing creative or artistic skills is a good thing	96%	96%
It is important to connect with your creative side sometimes	96%	95%
Having arts experiences available makes this a better place to live	91%	90%
Arts education is an important part of my child(ren)'s development as they grow up*	89%	88%
Arts experiences allow me and my family to connect with our culture	65%	61%

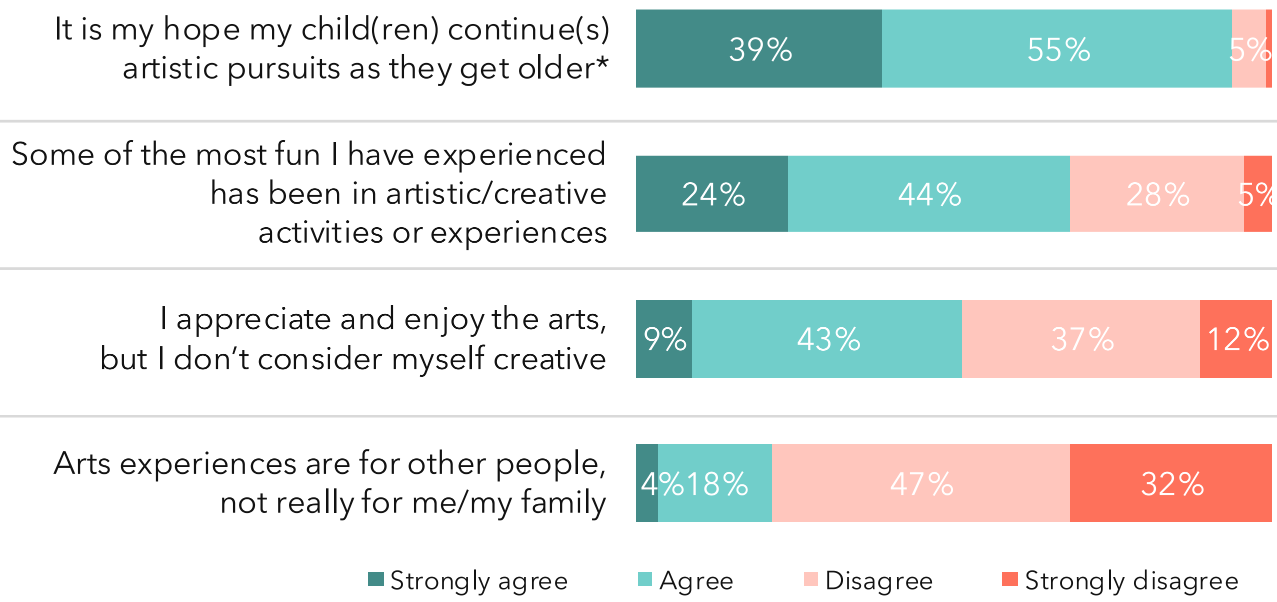
Base: Edmontonian respondents (n=400); *Have children under 18 in household - Edmontonians (n=96)
Q15. Below are a few statements about arts education; please review them and tell us if you agree or disagree with each one.

Edmontonians also see relevance in artistic experiences.

Stone — Olafson

Similar to the rest of the province, a larger proportion (78%) of younger Edmontonians (ages 18-34) agree on the element of fun they have experienced while being artistic or creative. This is a higher proportion when compared to the same age group in Calgary (71%) or regional Alberta (69%).

Perceptions of arts education on personal/child development



% Agree
(STRONGLY+AGREE)

	Edmontonians	Albertans
It is my hope my child(ren) continue(s) artistic pursuits as they get older*	94%	92%
Some of the most fun I have experienced has been in artistic/creative activities or experiences	68%	66%
I appreciate and enjoy the arts, but I don't consider myself creative	51%	53%
Arts experiences are for other people, not really for me/my family	21%	20%

Note: As a negative statement, reversed, this translates to 79% agree that arts experiences are relevant to them

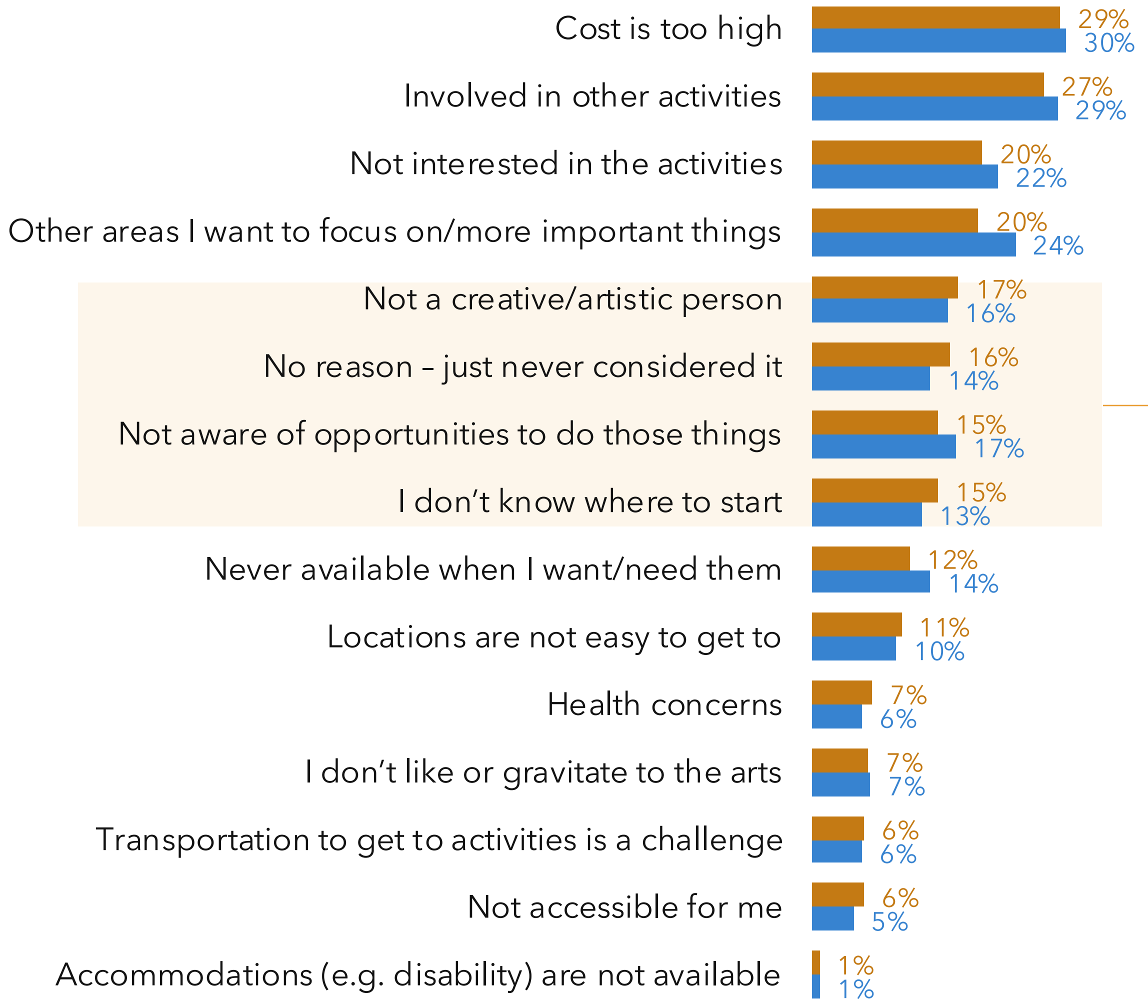
Base: Edmontonian respondents (n=400); *Have children under 18 in household (n=96)
Q15. Below are a few statements about arts education; please review them and tell us if you agree or disagree with each one.

Many Edmontonians are simply unaware or complacent, which presents a significant opportunity.

Stone — Olafson

The opportunity is greater in city centres (Edmonton as well as Calgary) where there is a slightly higher propensity to be uncertain of where to start or just haven't considered these types of activities.

Reasons for NOT participating in arts education activities



56% identify lack of awareness or need for reassurance

53% Albertans

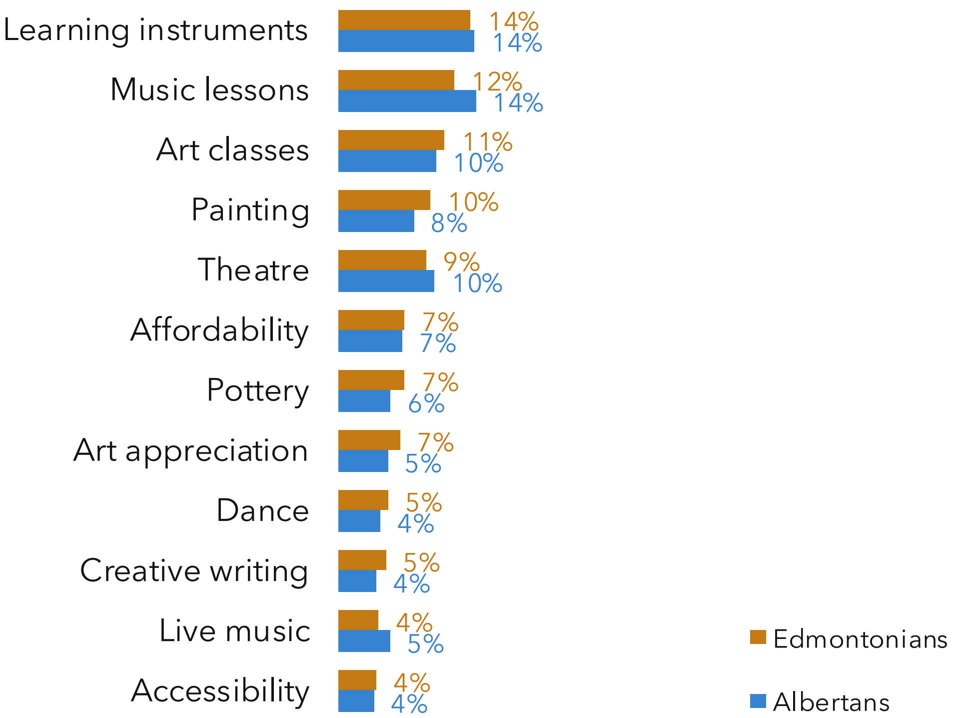
Edmontonians
Albertans

Base: Have not participated in arts related activities or experiences in the past two years- Edmontonian respondents (n=208); Albertan respondents (n=621)
Q12. Which of the following best describes why you personally have not participated in any of the listed arts related activities or experiences?

What art experiences do Edmontonians want available?

Edmontonians share the same desires as the rest of the province when it comes to art experiences – specific art forms are mentioned most often. However as most of these are likely available in some form, it suggests awareness and reach might be a more prevalent issue than availability.

Desired arts education experiences
(mentions of 4% or more)



Base: Edmontonian respondents (n=400); Albertan respondents (n=1,160)
Q16. What types of arts education experiences, if any, do you wish were available to you and/or your family? This could be anything – playing or learning an instrument, general learning about art or music history, trying or learning about a new art form, art appreciation class, theatre, etc.

Enjoyment is of superior importance for adults compared to development.

However, Edmontonians stand out slightly for identifying interest in a specific art form or developing a specific skill. That said, like the rest of Albertans, having fun is the most important.

Reasons for participating in arts education – % selected (top 3)

69% mention enjoyment or entertainment as a reason

73% Albertans

36% mention development as a reason

37% Albertans

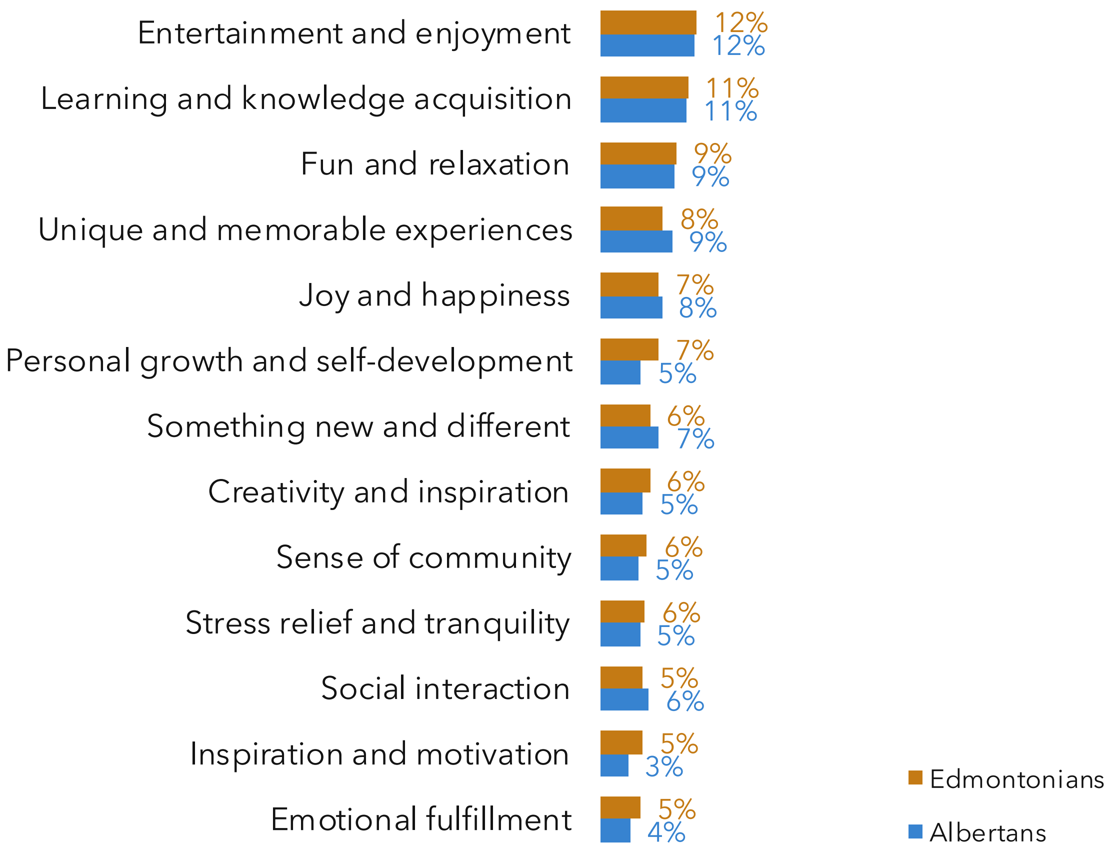
Base: Participated (personally or children) in arts related activities or experiences in the past two years – Edmontonian respondents (n=225); Albertan respondents (n=655)
Q14. What are some of the MAIN reasons [you/your child(ren)/you and your child(ren)] participated in the arts related activities or experiences selected? (select up to three reasons only).

What do Edmontonians get out of attending arts experiences?

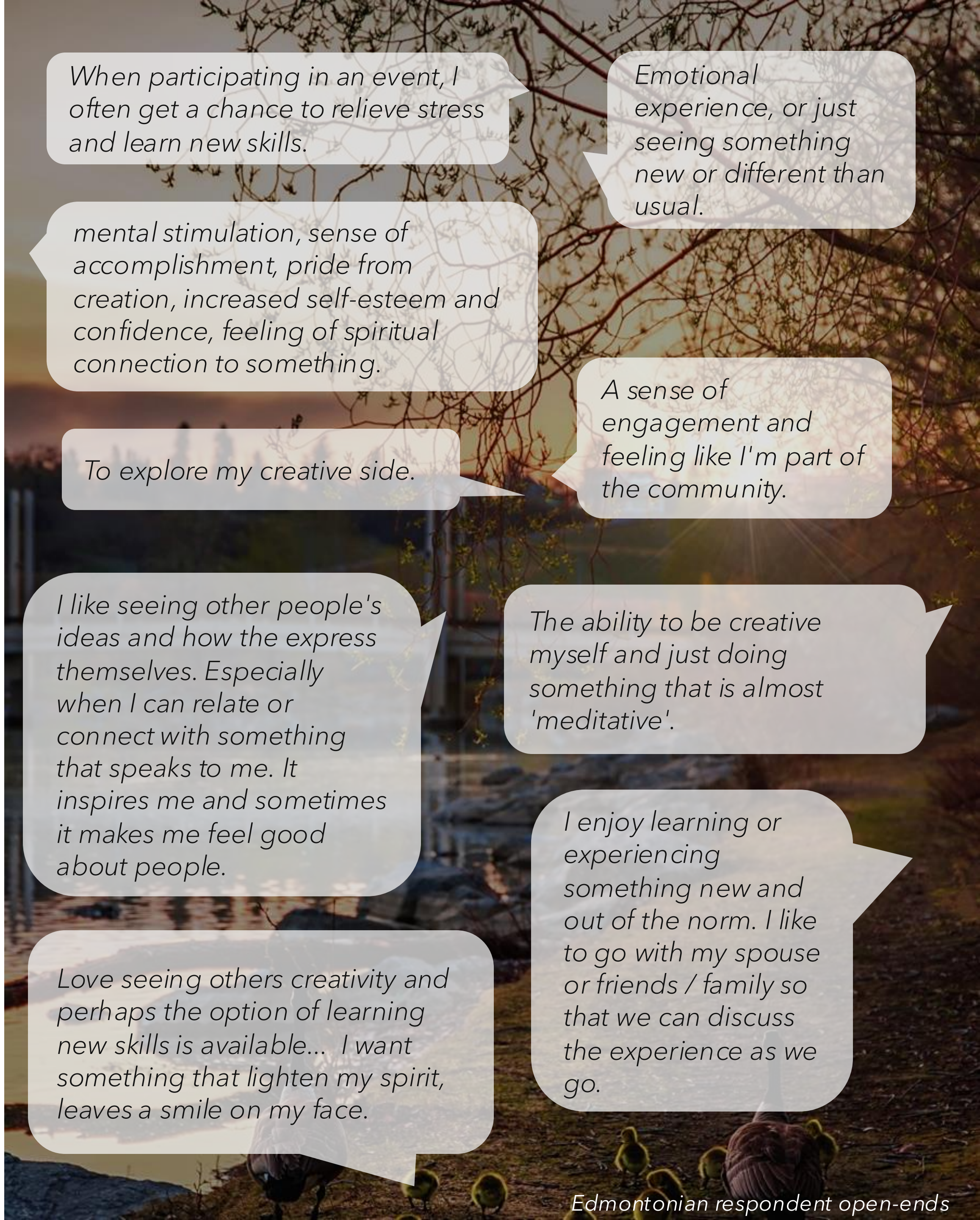
The sentiment is similar across the province – it's the combination of benefits and personal development that makes art experiences different than other activities.

Personal outcomes from experiencing/participating in arts

Mentions of 5% or more



Base: Edmontonian respondents (n=400); Albertan respondents (n=1,160)
Q32. What is it that you personally get out of attending an arts related experience or participating in an arts related activity that you do not get from other types of experiences/activities? (This could be anything.)

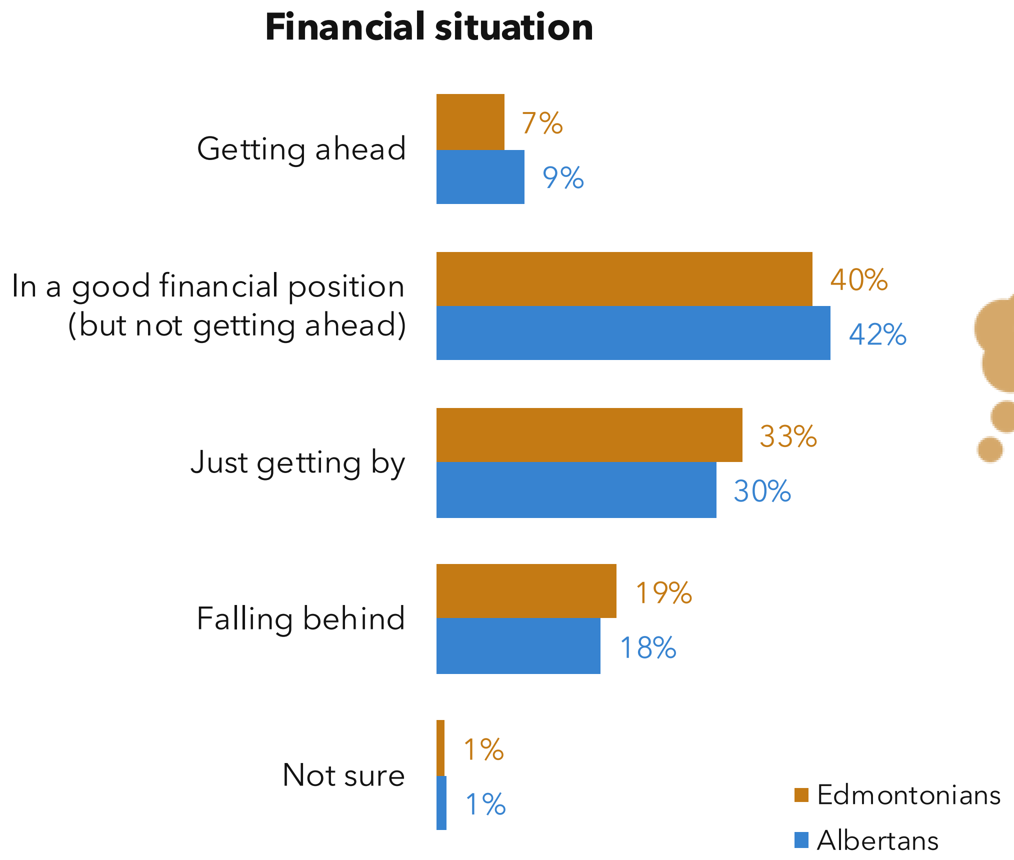


Stone — Olafson

Understanding Spending and Affordability

Financial situations are similar across the province and can be described as stable or struggling.

A slightly higher proportion of Edmontonians feel as though they are 'just getting by' or 'falling behind', which serves as a reminder of the consumer mindset while facing challenging economic conditions and gives insight into how they will spend.



Habits among Edmontonians who are getting by or falling behind are similar across the province. They tend to have a **strict budget** and have a specific amount they want to spend on activities and are more thoughtful when selecting what fits into the budget. Show them the value.

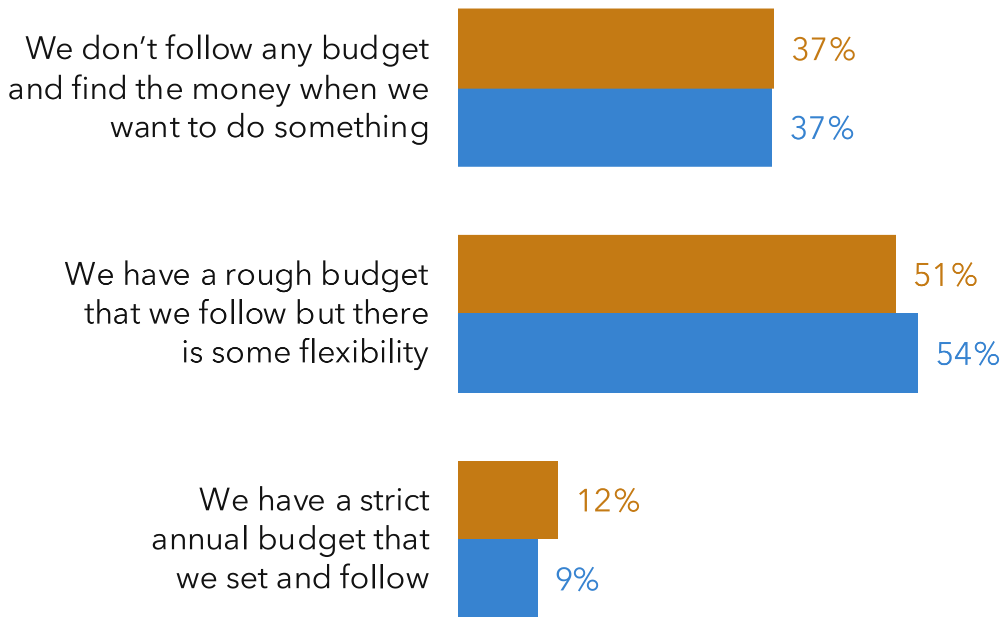
In addition, they seek out **flexibility and options** when it comes to activities. They prefer many activities at a lower cost over one more expensive activity and are less likely to prefer to make a commitment in advance.

Base: Edmontonians respondents (n=400); Albertan respondents (n=1,160)
Q36. Thinking about your own financial situation and the overall cost of living, are you...?

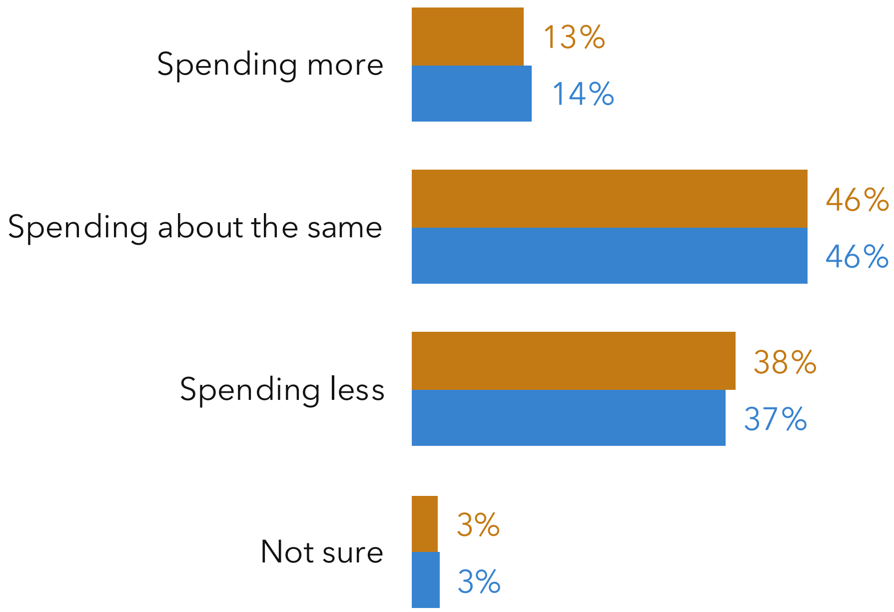
Edmontonians identify flexibility in how they budget.

Slightly more Edmontonians have a strict budget; however, the majority of consumers in this market either maintain a rough budget or don't follow one at all. This indicates that it's not solely about spending, but rather about how arts experiences align with the money allocated for activities. In fact, just under six in ten Edmontonians (59%) are spending the same as or more than they did last year on discretionary activities. This suggests that they are making informed and sensible choices about which activities to engage in by evaluating their value. As an arts organization, it is critical to demonstrate to Edmontonians that your offerings are 'worth it.'

Budget for discretionary experiences and activities



Spending on discretionary experiences/activities
(compared to a year ago)



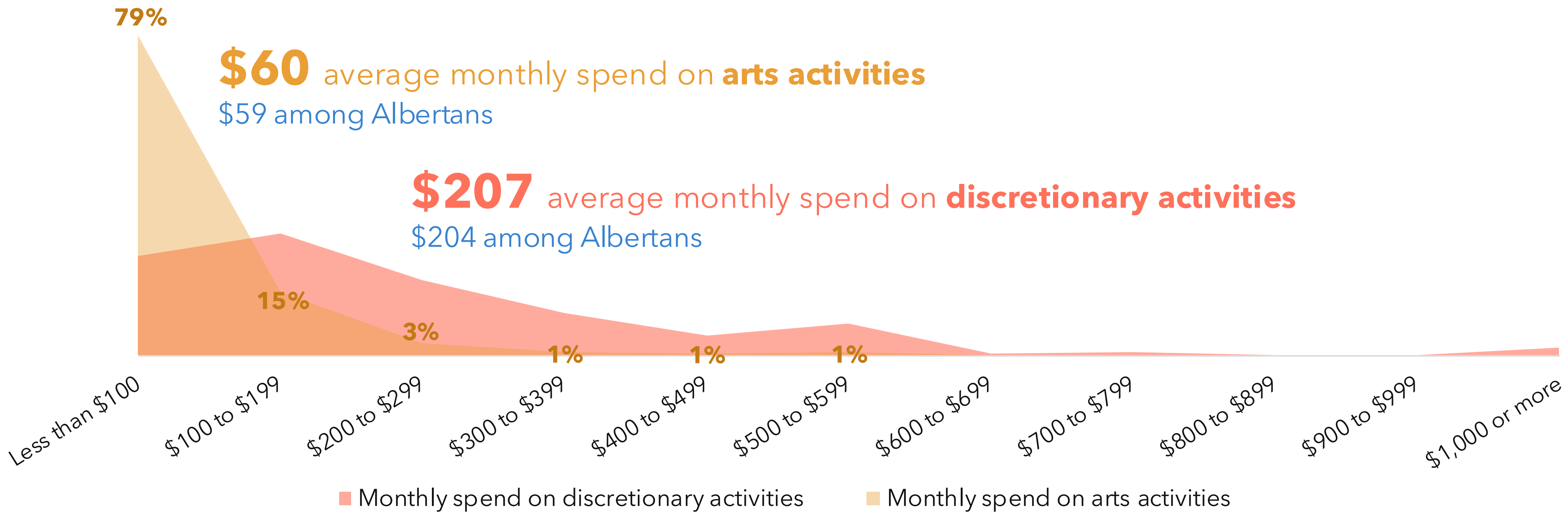
■ Edmontonians ■ Albertans

Base: Edmontonian respondents (n=400); Albertan respondents (n=1,160)
Q21. Which of the following best describes how you decide on spending on discretionary activities and experiences?
Q18. Thinking about your current situation compared to this time last year and spending on discretionary activities and experiences, are you…?

Edmontonians are spending similar amounts on discretionary activities as the rest of Albertans.

The proportion spent on arts activities compared to all activities is also similar across the province. Organizations are competing for share of wallet.

How much do you spend on activities?



Discretionary activities defined as: Any discretional activity, experience, or thing to do outside of your regular expenses or financial obligations (mortgage, rent, groceries, transportation, debt, etc.). This could include spending on dining, recreation, classes you take, activities, arts and culture, concerts, arts creation you may do, dance, etc. - per month on experiences

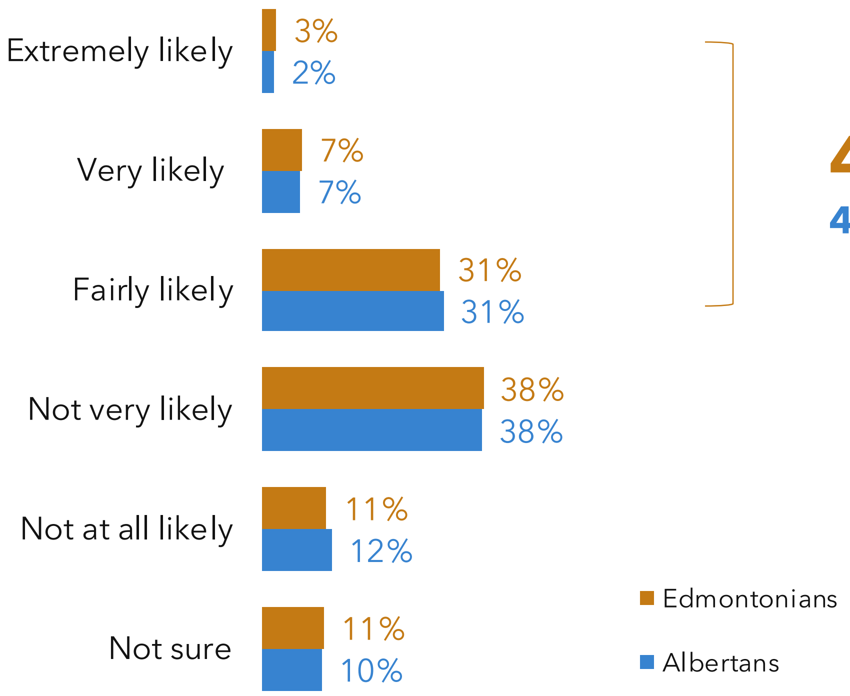
Arts and culture activities/ experiences could include music, concerts, cinema, performances, theatre, museums, galleries, creative writing, arts classes of any kind, cultural festivals, and other similar activities/experiences.

Data reflects self-reported spend. Base: Respondents who spend on discretionary and arts experiences – Edmontonians (n=317) – outliers removed
Q17. The next few questions ask you about spending on experiences. Overall, how much would you estimate you spend every month on EXPERIENCES?
Q19. When you think about all the discretionary experiences and activities and experiences you spend on, about what percent is for arts and culture related activities/experiences?

Spending on arts experiences is unlikely to grow significantly in the next year.

The proportion of Edmontonians who are very or extremely likely to spend more is small. An increase in spend is most likely to happen from those who are already spending. Organizations will likely be collecting from those who attend or participate within the arts in some form.

Consideration to spend MORE on arts experiences



40% likely to spend more

40% likely to spend more for Albertans

Base: Respondents who stated spending less than 100% of total discretionary spend on arts experience – Edmontonians (n=385); Albertans (n=1,118)

Q22. Earlier you indicated you spend about [QID19-TotalSum]% of your discretionary budget on arts related experiences and activities. How likely are you to consider spending more than that in the year ahead on arts experiences?

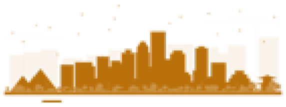
Consider messages about simplicity, being interesting, or catered towards social motivations to increase spend.

Stone – Olafson

These elements are critical for the early stages of consideration for all Albertans, Edmontonians included.

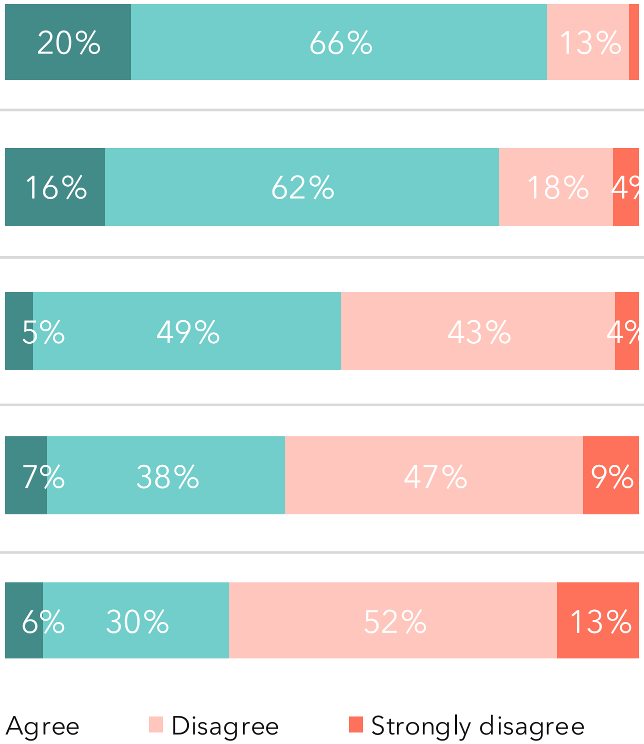
Messages to increase consideration to spend more on arts experiences/activities	Edmontonians	Albertans
Activities/experiences that are easy to enjoy and do	49%	50%
Activities/experiences that help me learn something new	46%	47%
Something that I can do with my friends/social group	45%	44%
The promise of experience that will make me feel something	43%	41%
Something that also supports a cause in the community	37%	36%
Activities/experiences where 'extras' like parking or refreshments are included	36%	34%
Activities/experiences that are interactive	29%	27%
Activities/experiences for your whole family or household	26%	27%
Activities/experiences that are not available anywhere else	24%	24%
Something I can do over and over	22%	20%
Activities/experiences where 'perks' are included	15%	16%
Packages that cost more but deliver savings for more individual experiences	12%	10%
There is nothing organizations could do to get me to spend more	12%	12%

Base: Edmontonian respondents (n=400); Albertan respondents (n=1,160)
Q23. There are different things organizations could say, offer, or do to get consumers, like yourself, to spend more. Which of the following would get you to consider spending more on arts related activities and experiences in the year ahead? Select all that apply.



There is a willingness to spend, but it has to be 'worth it'.

This sentiment is similar to others in Alberta and shows Edmontonians are budget conscious and hesitant, but they are willing to spend if an activity stands out or feels right for them. Price as the sole decision criteria is higher in Edmonton, but overall, most are not choosing based on price alone. There is an ongoing tension between financial constraints they face at home and a desire to engage with experiences. This reinforces the priority to communicate the value of an experience – the 'why' messages that speak to intrinsic motivations.

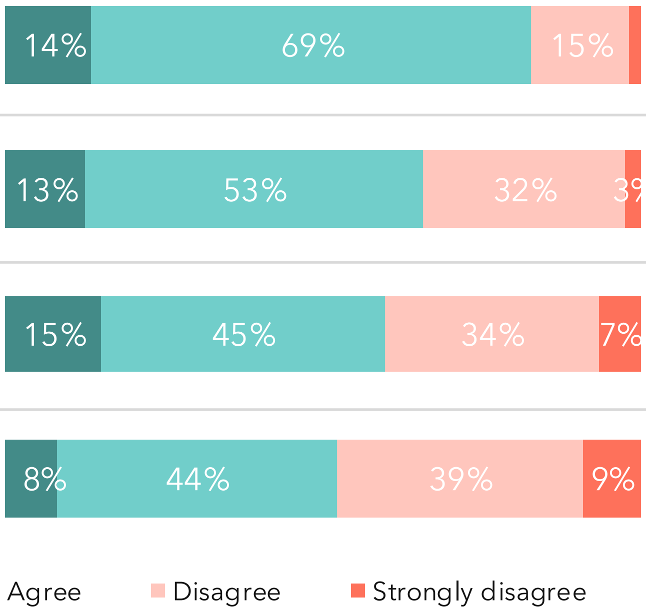


Statement	% Agree (STRONGLY+AGREE) Edmontonians	% Agree (STRONGLY+AGREE) Albertans
If I find an event, experience, or activity that is particularly unique or appealing to me, I'm willing to spend for it	86%	85%
I don't mind committing a long time in advance if it means that I will get the access I want	78%	79%
I tend to spend on the same activities/experiences each year rather than new ones each year	53%	51%
I'll choose an activity/experience if the price is right even if it isn't something that I'd normally participate in	44%	43%
I choose which activities/experiences I do based on the price alone	36%	32%

Base: Edmontonian respondents (n=400); Albertans (n=1,160)
Q20. Below are a few things people might say about how they decide which activities and experiences to spend money on. Please tell us if you agree or disagree with each one.

Flexibility and offering options has a wide appeal, especially to those who are more budget conscious.

Edmontonians are very similar to the rest of Albertans in many of their attitudes towards spending, although they 'strongly agree' more than the rest of Albertans when it comes to their preference to budget for many low-cost experiences rather than spend in one place and picking and choosing what fits into a pre-determined budget. Because of this, considering how to offer affordable options will be key to fostering greater engagement.



	% Agree (STRONGLY+AGREE) Edmontonians	Albertans
I first decide on an activity/experience I'm interested in and then will find a price option that works for me	83%	82%
I prefer to budget for many activities/experiences at a lower cost rather than spending it all in one place	66%	63%
I have a specific amount I want to spend on activities/experiences, so I pick and choose what fits into that budget	60%	57%
I'll take advantage of promotions even if it's not the lowest price – I just love a deal!	52%	50%

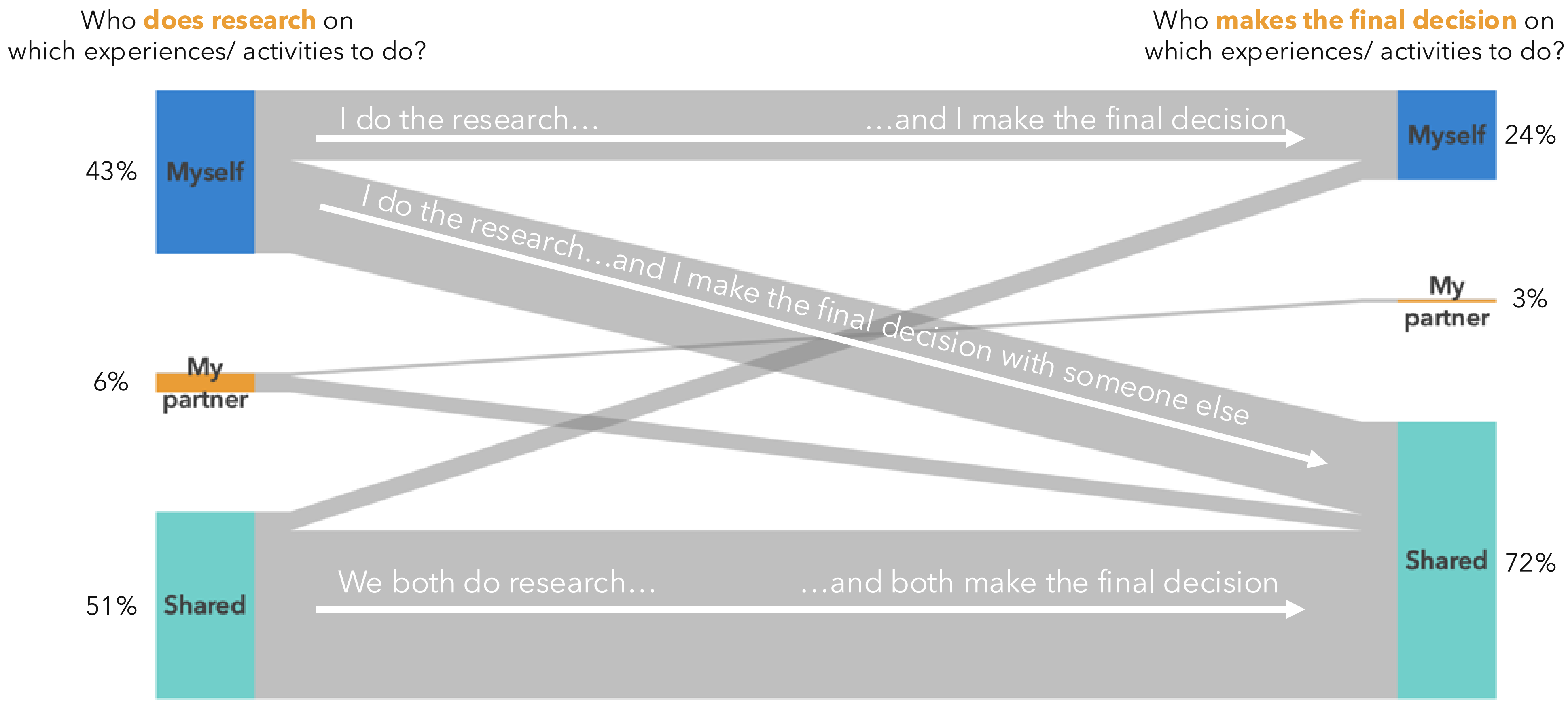
Base: Edmontonian respondents (n=400); Albertans (n=1,160)
Q20. Below are a few things people might say about how they decide which activities and experiences to spend money on. Please tell us if you agree or disagree with each one.

Stone — Olafson

Decision Making and Last-minute Activities

While individuals are often doing the legwork, the final decision on engagement is usually shared.

Sharing the decision-making process is a trend across the province and tells us marketing messages have to resonate with a wider audience.



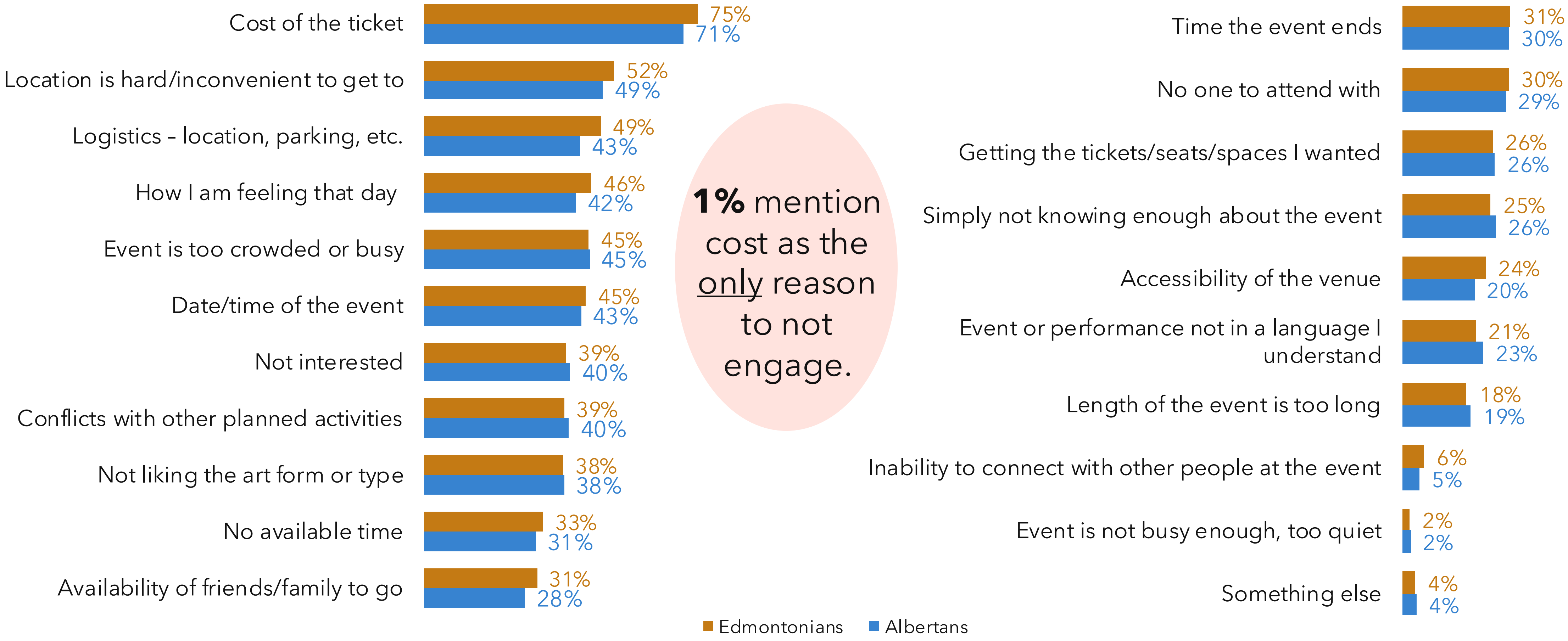
Base: Respondents who live with at least one other person – Edmonton (n=324); Alberta (n=963)
Q25. In your case, who typically does the research and comes up with ideas on what activities and experiences you might do?
Q26. And how about the final decision? Who typically makes the final decision on what activities or experiences to do?

Cost is a major consideration, but not the only barrier

Stone Olafson

Not surprisingly, cost plays a critical role. But for Edmontonians, as well as Albertans, there are other barriers to address. Consumers in this market compared to Calgary or regions outside of the city centres are more likely to identify logistics, how they're feeling, and lack of time available as barriers.

Barriers to participation

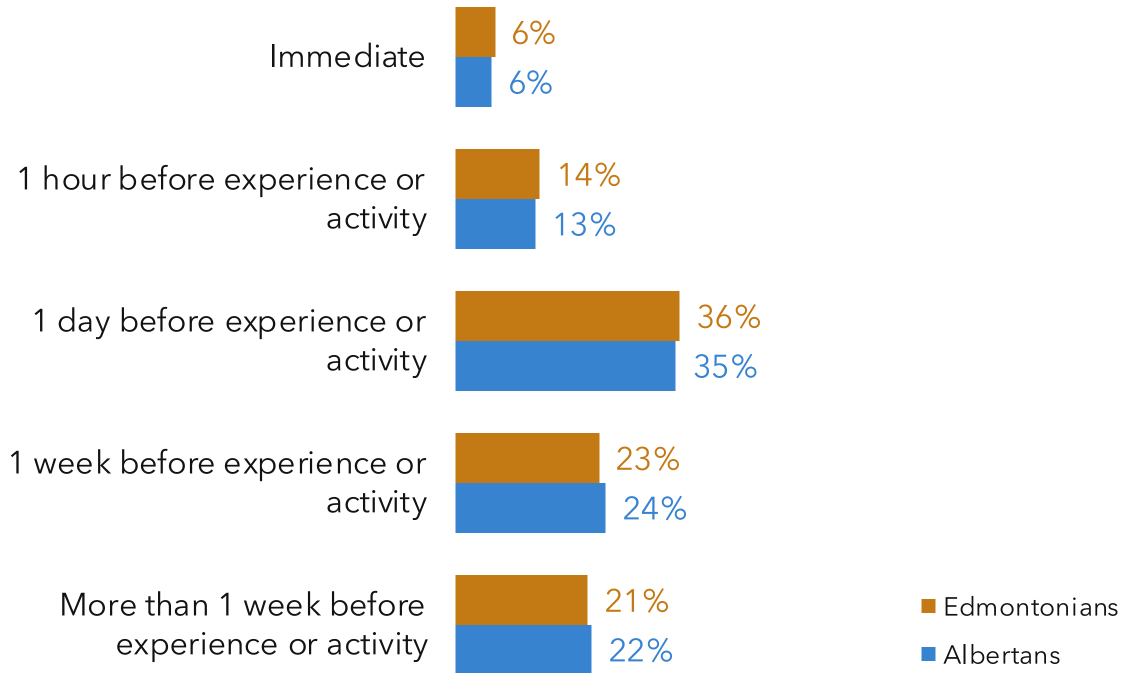


Base: Edmontonian respondents (n=400); Albertan respondents (n=1,160)
Q31. Thinking about any decision, short or long term, that you make about attending events or participating in arts related activities/experiences, what are those things that are most likely to prevent you from going? This could be anything that stops you from making that final decision to attend or purchase tickets. Select all that apply.

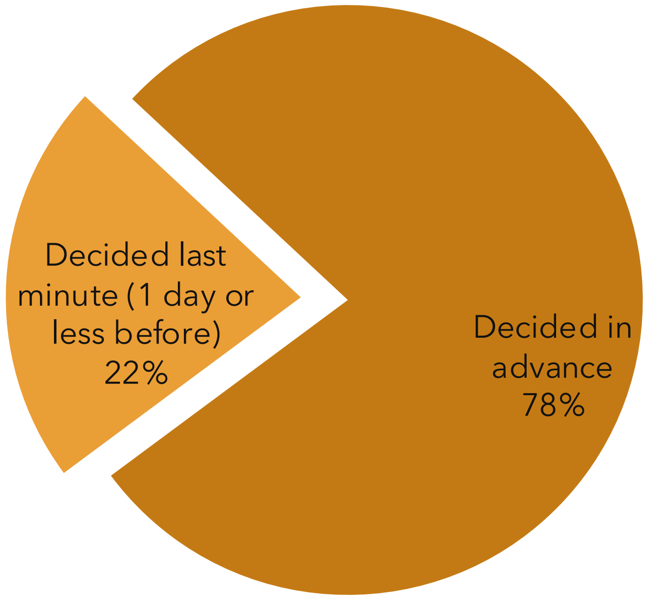
Edmontonians are mostly planners with with few committing to ‘last-minute’ experiences.

Edmontonians’ planning behaviour is similar to that of the whole province. Impulse decisions are fairly elastic with a small proportion thinking in immediate terms. A variety of factors will impact the timing of a decision – besides awareness. Factors like availability of tickets, timing and cost are all things that will impact the planning behaviour.

Defining last-minute timeframe for planning experiences/activities



Planning for all experiences/activities

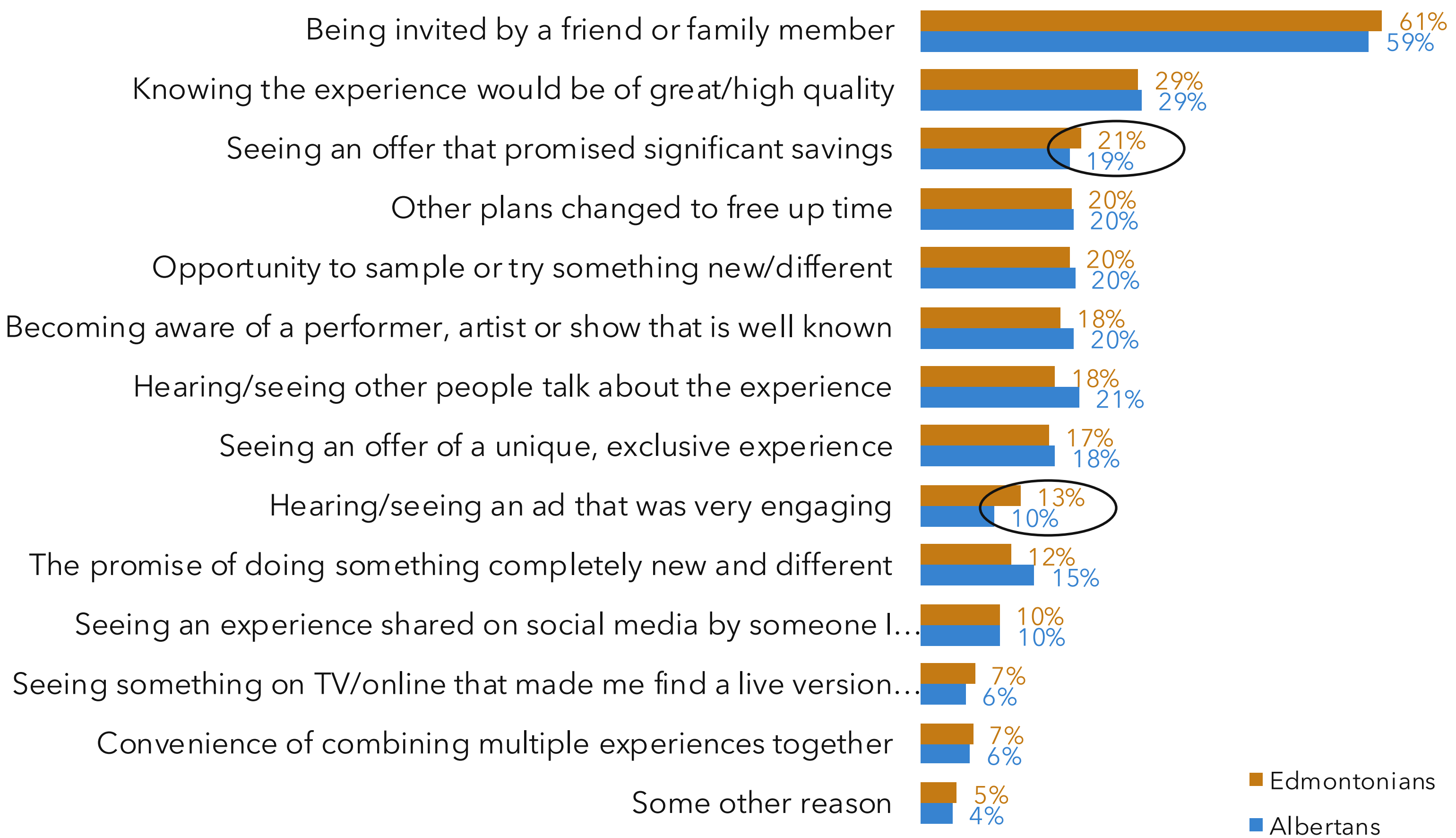


Base: Edmontonian respondents (n=400); Albertan respondents (n=1,160)
Q27. Thinking about the timeframe in which you typically make decisions to participate in experiences or activities, what would you consider to be ‘last minute’ or an ‘impulse’ decision?
Q28. When you think about all the experiences you typically engage in, what proportion are decided well in advance? How about last minute?

Awareness and opportunity will be THE factors inspiring impulse engagement in Edmonton.

Edmontonians are also slightly more motivated by factors such as cost savings and advertisements.

Messages to inspire last-minute experiences/activities
Top 3 selections



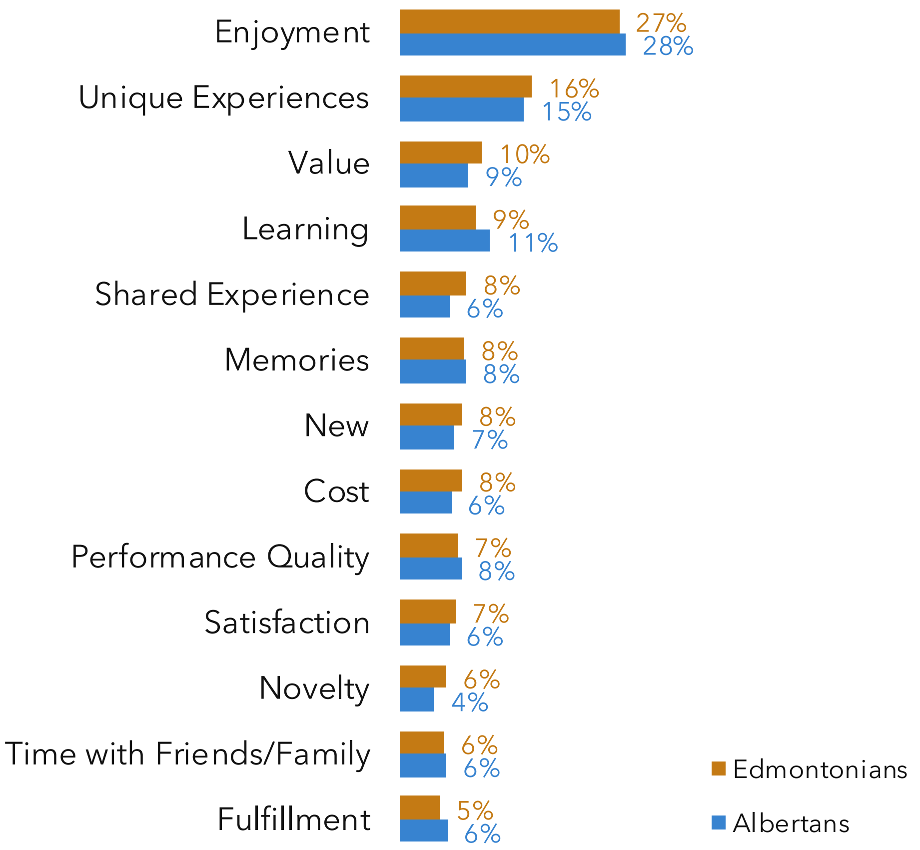
Base: Edmontonian respondents (n=400); Albertan respondents (n=1,160)
Q30. What is most likely to inspire you to do something at the last minute? Select up to three.

What makes art experiences or activities worth it?

Sentiment is similar across Alberta, and it will be important to tap into emotions to draw Edmontonians in and leave a lasting impression.

Defining what makes an arts experience 'worth it'

Mentions of 5% or more

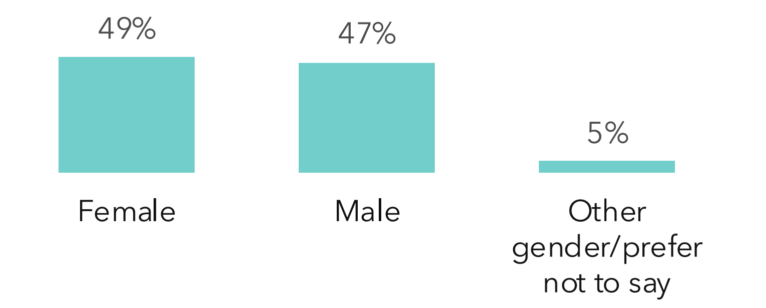


Base: Edmontonian respondents (n=400); Albertan respondents (n=1,160)
Q33. What makes an arts experience or activity worth it (both in time and money)?

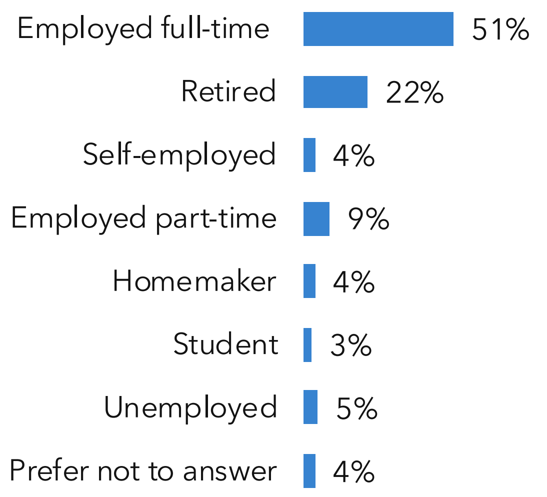
Respondent Profile

Respondent Profile:
Who We Heard From

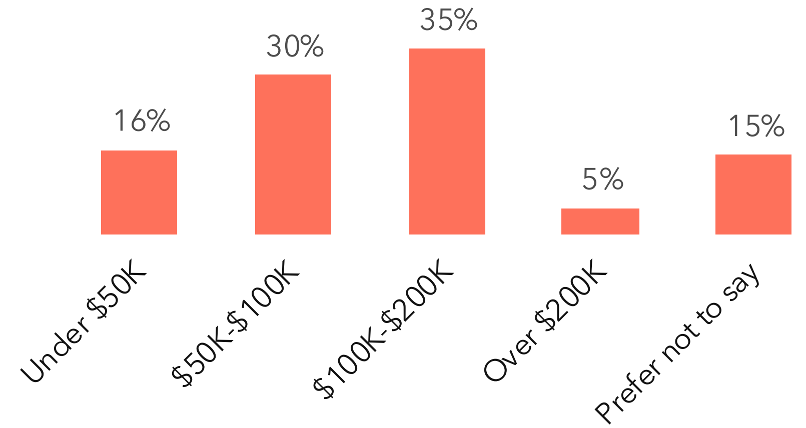
Gender



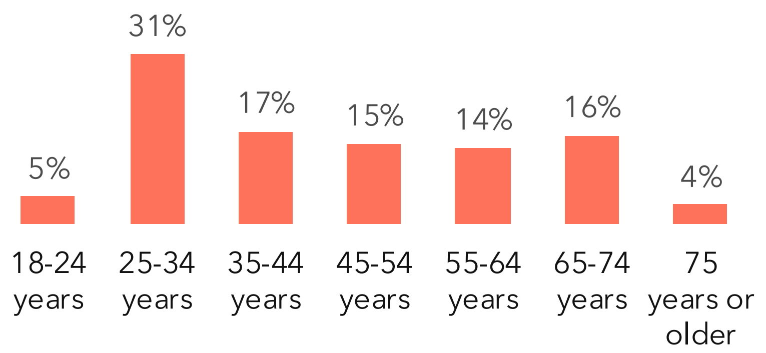
Employment



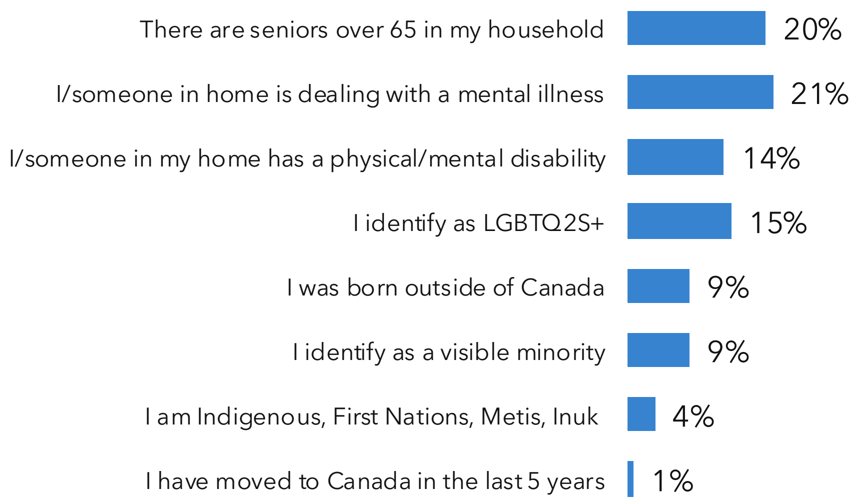
HH Income



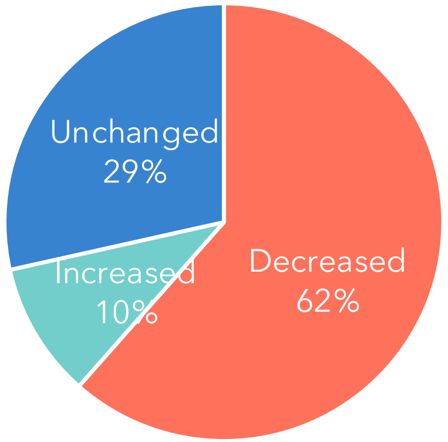
Age



Diversity/Identity



Income Change – Past 3 Years



Base: Edmontonian respondents (n=400)

Understanding people.

It's what we do.

Stone-Olafson

Questions or Comments?

Please contact: mathew@stone-olafson.com
megan@stone-olafson.com
raquel@stone-olafson.com