

# Spotlight on Arts Audiences

Wave 3: Summer/Fall 2024  
Calgary results



# Thank you to our generous partners

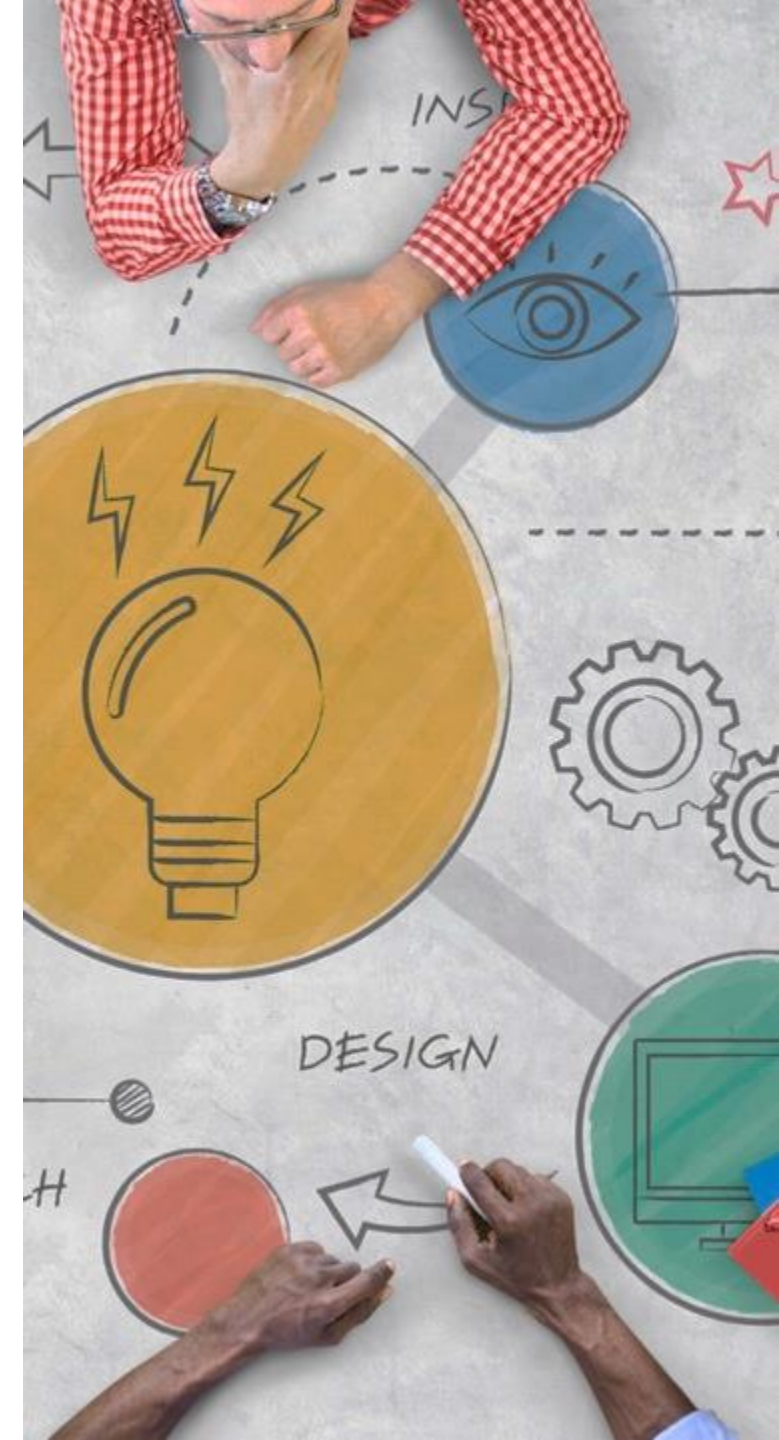
This initiative is being funded by arts funders who are keen to use data to drive engagement and growth strategies across Alberta.

**We thank them for their generous support.**



**The point of this work is to help leaders like you reach more people.**

**The data is yours to leverage and should be applied along with other inputs - put it to work!**



# Our approach.



**n=1,600**

These are results  
from **Calgary only**  
(n=400)

**+/- 4.9%**



**August**  
**5 - 15<sup>th</sup>**



**Representative**  
**sample of Arts**  
**Interested**  
**Calgarians**



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.



There are two primary currencies of engagement: **time** and **money**.

**The competition for time is fierce:** audiences only have 16 hours of free time a week to invest.

While some time is devoted to arts experiences, audiences **aspire to investing more.**

Audience growth will hinge on reaching audiences who need to hear about experiences in more personal terms.

1

**Emotional benefits** are key to garnering greater investments of time and dollars.

2

Audiences **want to see themselves in the activity**. Help them see it.

3

The market **craves flexibility**. Consider ways to meet their expectations by providing choice.

4

Philanthropic support will be a challenge but not impossible. **Evolve messages** past the personal motivations to show impact, create urgency & make it easy.



# Exploring engagement this fall.



## Back to School

Growing engagement through arts learning.



## Making Choices

Understanding when decisions are made to engage.



## Feeling the Pinch

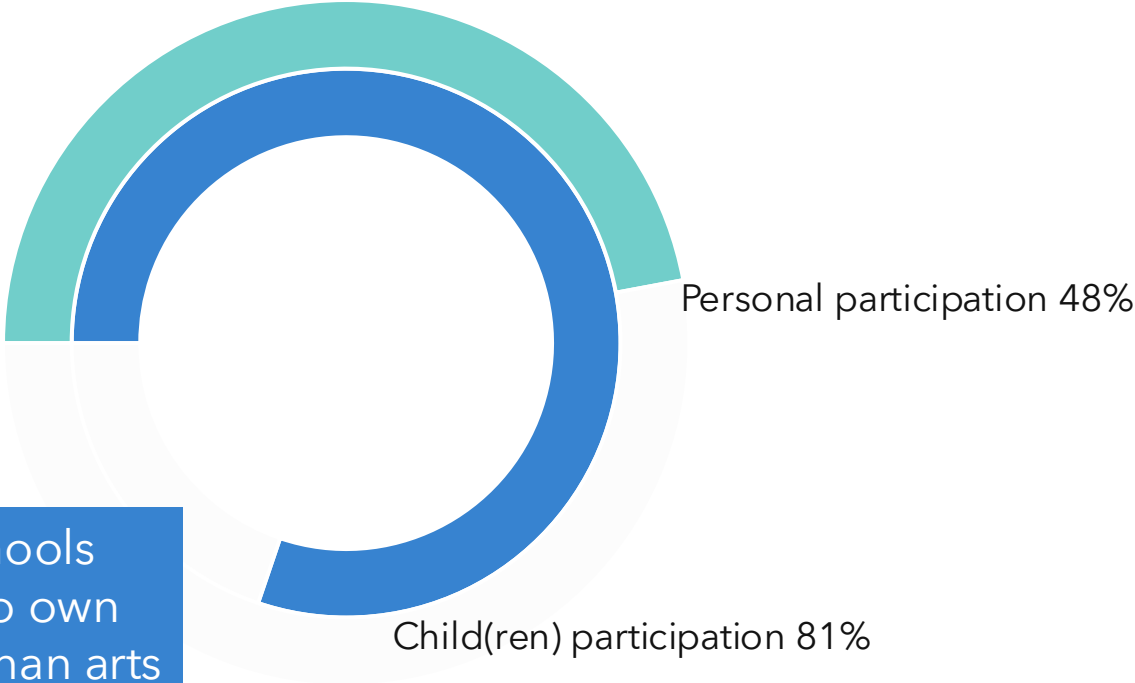
More on spending habits.

# Engaging in Arts Education



# Children are much more likely to be engaging in hands on learning in the arts than adults.

**Participation in art classes or workshops**  
% in the past two years



And schools appear to own this more than arts organizations.



**Audiences clearly  
see the value,**

**98%**

Developing creative  
skills is a good thing.

**96%**

Important to connect to  
creative side.

**89%**

Arts education is important  
part development.

**and most see the  
experiential benefits**

**92%**

Arts experiences make  
this a better place to live.

**66%**

Some of the most fun I've had is  
in creative activities/experiences

**and the personal  
relevance.**

**18%**

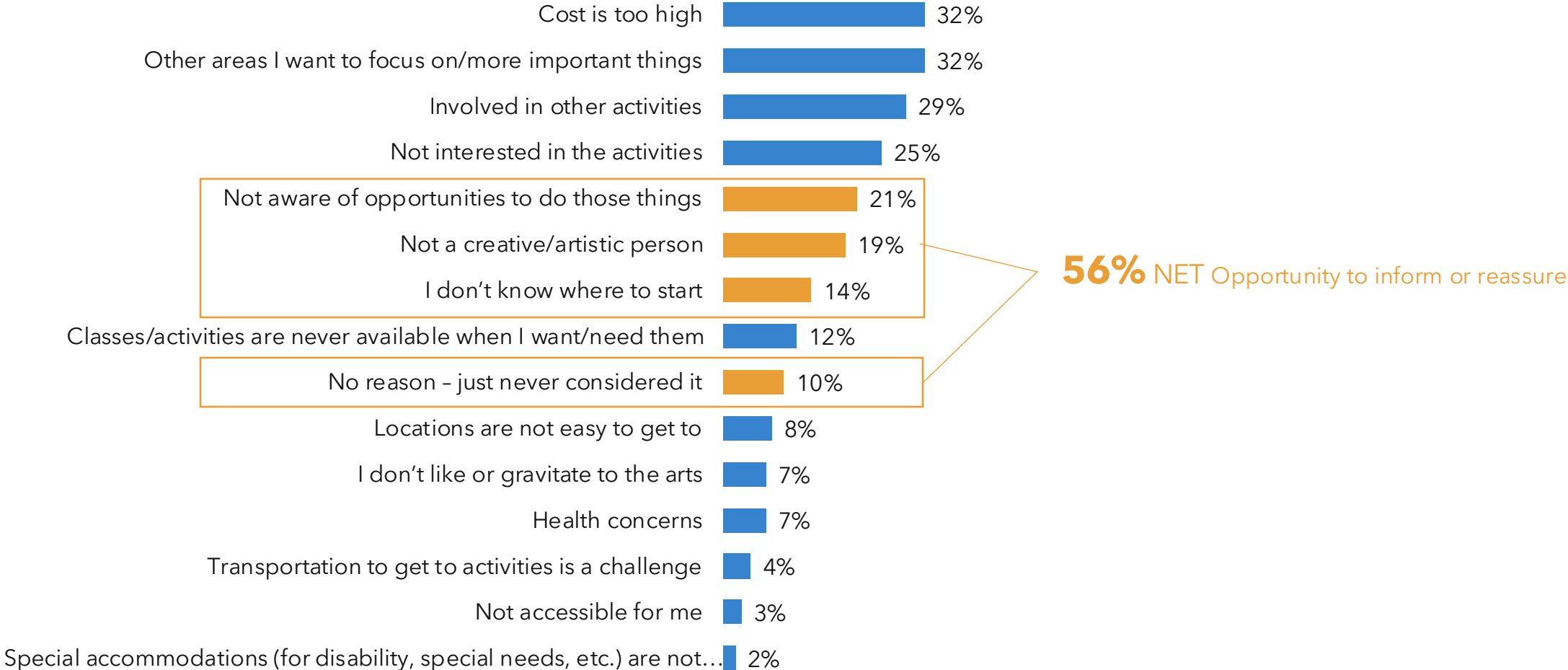
Arts experiences are for other  
people - not really for me or my  
family.

**51%**

Appreciate the arts but don't  
consider themselves creative

# But why are 52% of adults still not participating?

## Reasons for NOT participating in arts education activities



# When it comes to participating in arts education, personal development takes a back seat to basic enjoyment.

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



# There are more benefits than just learning.



*Emotionally charged experience.*

*Doing something creative that's not part of our day-to-day experience.*

*Being able to enjoy an experience and create memories with people I want to spend time with.*

*Being able to express my creative side.*

*You usually are focused and in the moment. Also, an experience that you can share and discuss with others.*

*Learning something new, meet new people and get to personally experience the process.*

*Relaxation and peace from doing stuff i enjoy and want to be around. Something I can just enjoy without being coerced into other obligations or commitments (sold stuff).*



## Back to School

- ✓ Audiences understand the value and relevance, so a market exists.
- ✓ Too often the message is about the feature: development.
- ✓ Align with the benefits and motivations instead: **enjoyment, memorable, new.**

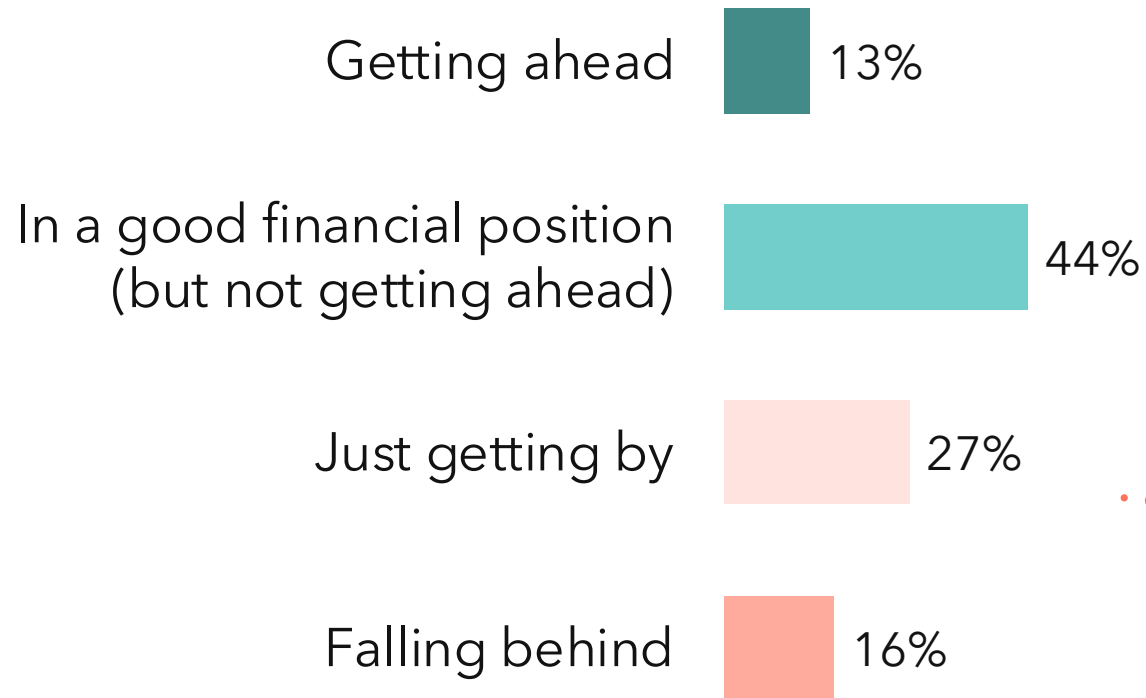


BOX OFFICE

# Understanding Spending and Affordability



# Financial optimism continues to wane in Calgary. And how people feel about their finances shapes how they engage.



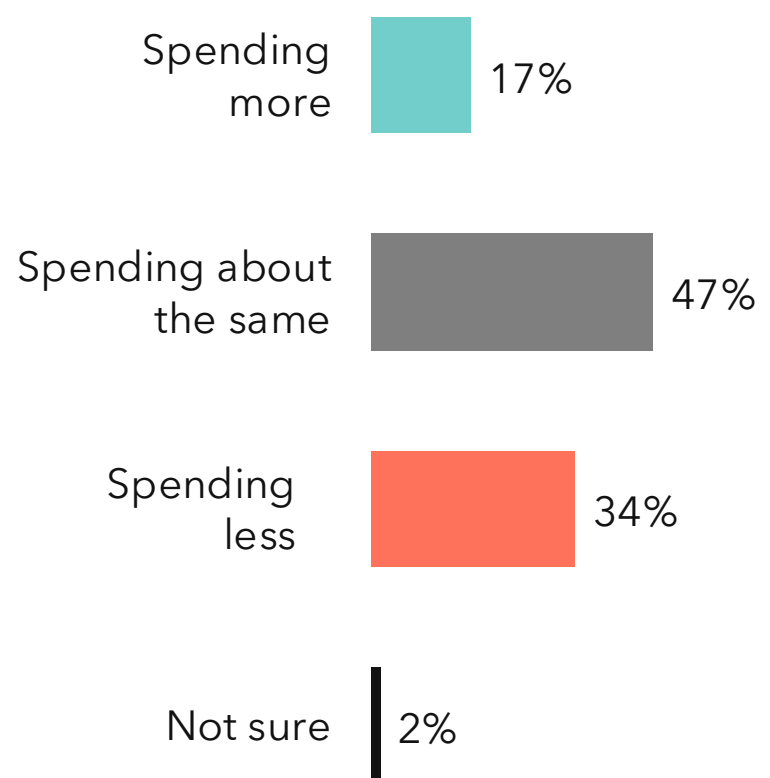
- Stricter budgets with set limits.
- Increased desire for flexibility.
- Focus on lower cost.
- Less likely to commit.

# Spending habits are shifting.

How does that compare to last year?

How much are they spending?  
**\$219**

How much on the arts?  
**\$61**



**How about next year?**

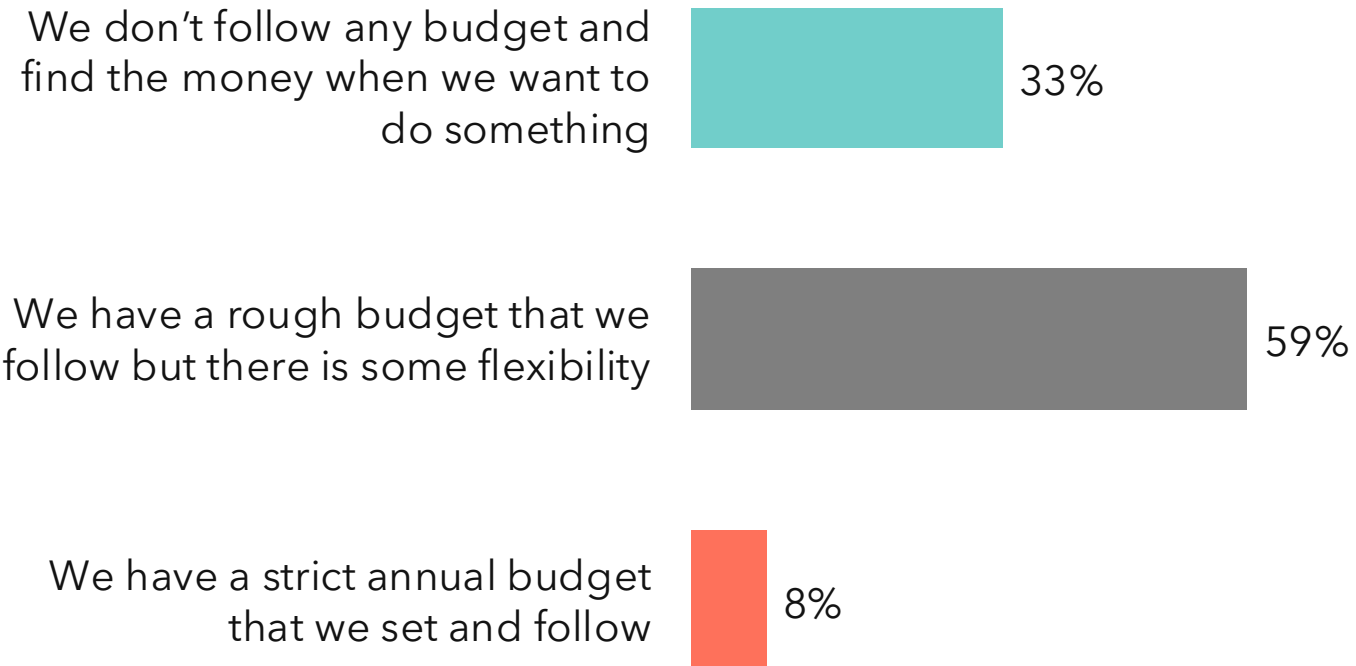
9% extremely or very likely to spend more.

47% Unlikely

45% on the fence

# Many budgets aren't strict – there is flexibility and an open-mind with budgeting

## Budget for discretionary experiences and activities



# Attitudes about spending reveal a hesitant consumer base.

Only a small proportion (**33%**) are deciding on price alone.

**83%** first find something they want to do, then find a price option that fits.

Many (**86%**) are willing to spend but it must be appealing and unique.

Many (**63%**) are trying to get many experiences at lower prices.

# Messages that are likely to compel spending have more to do with value than price.

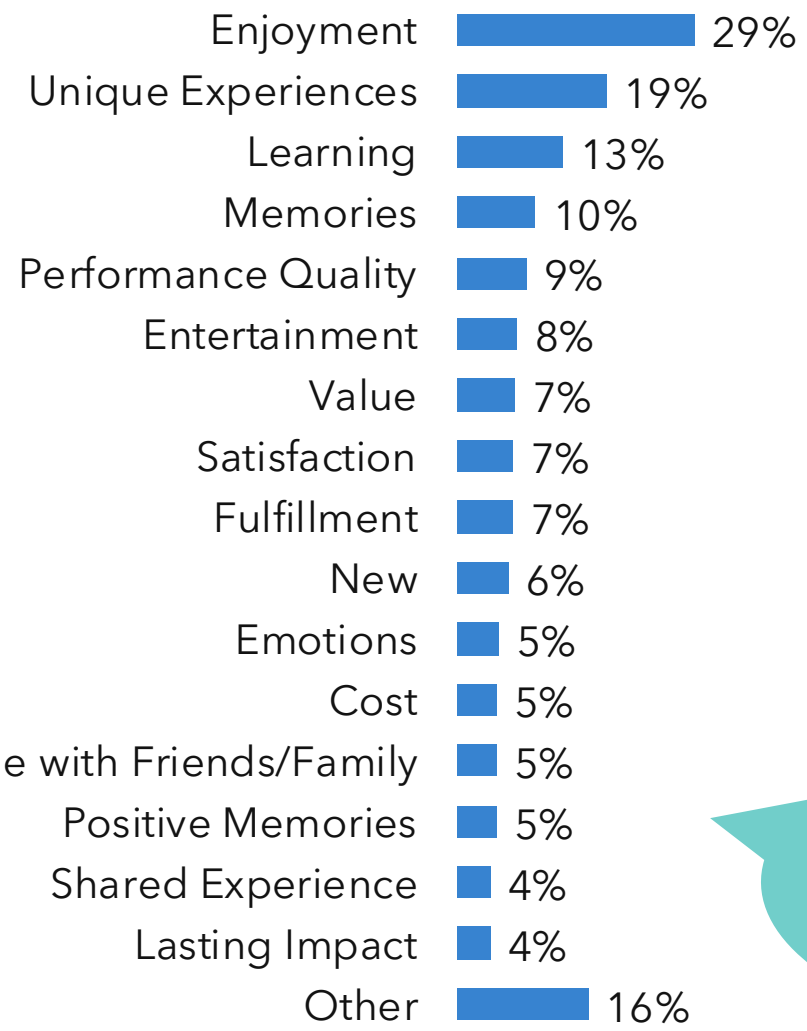


# How do audiences judge if something is worth their time and money?

*Being able to express or appreciate creativity and getting something meaningful out of it (could be material like a painting or not, like a good memory).*

*There's something for my kids to appreciate, AND myself. Shows a new perspective.*

*Connection with others.*



*If it's high quality, easy to attend and offers something all the family can enjoy.*

*Leaving with the feeling that I learned something new or really 'felt' something from the performance or piece.*

*Something that is engaging while being cost friendly and something the offers new experiences.*



## Feeling the Pinch

\$ Affordability is a challenge that is not going away.

\$ Spending is constrained, but it is happening. Interest drives the decision, not the wallet.

\$ Lower price helps, but the conversation starts with showing value & benefit more than price on its own.

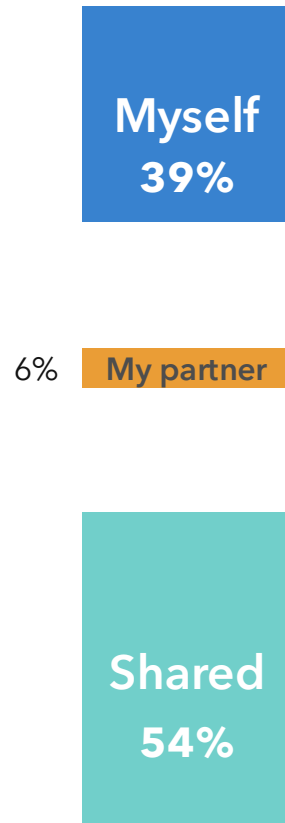


A woman with red hair is sitting on a brown couch. She is holding a baby in her left arm and a toddler in her right arm. They are all looking at a tablet computer that the toddler is holding. The background is a blurred living room.

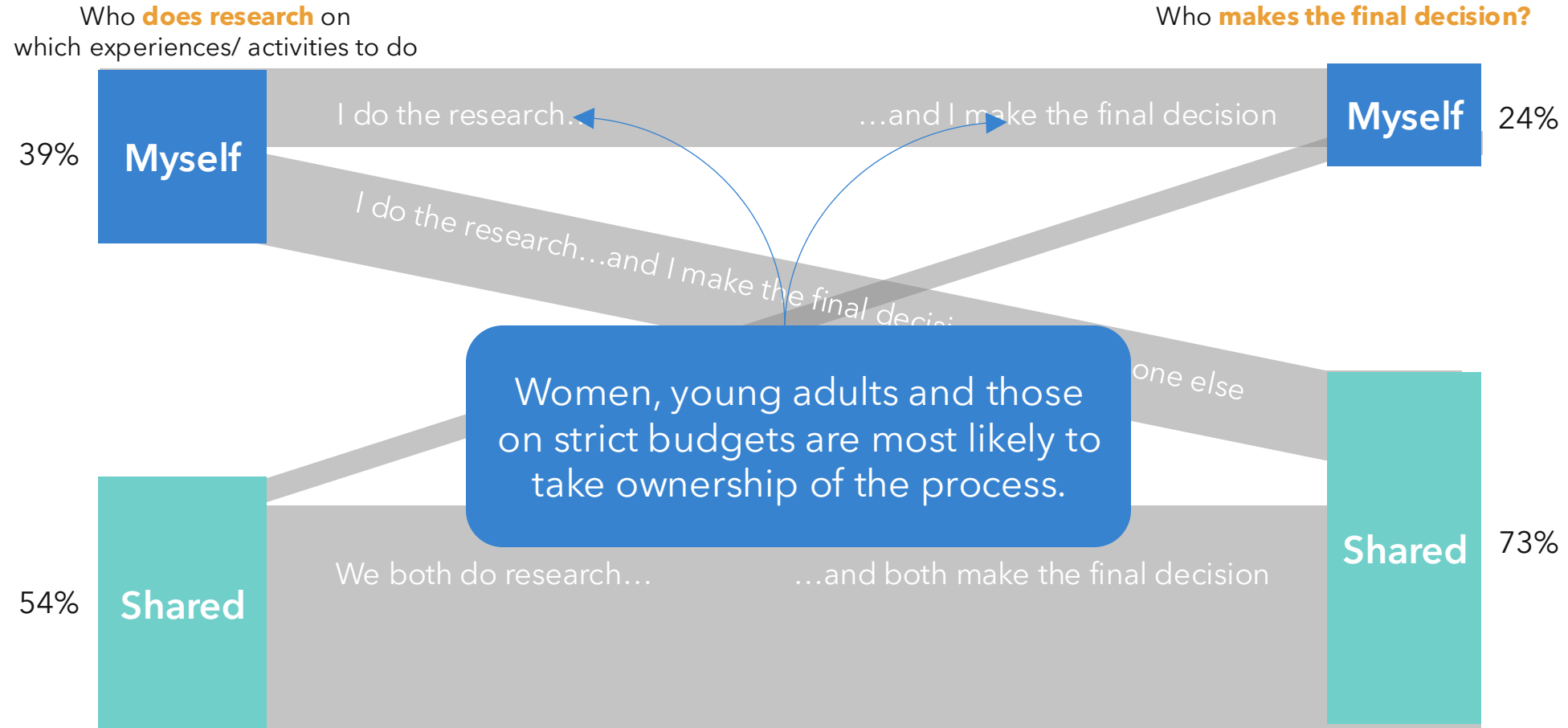
# Decision Making and Last-minute Activities

# Not everyone approaches the planning process the same way.

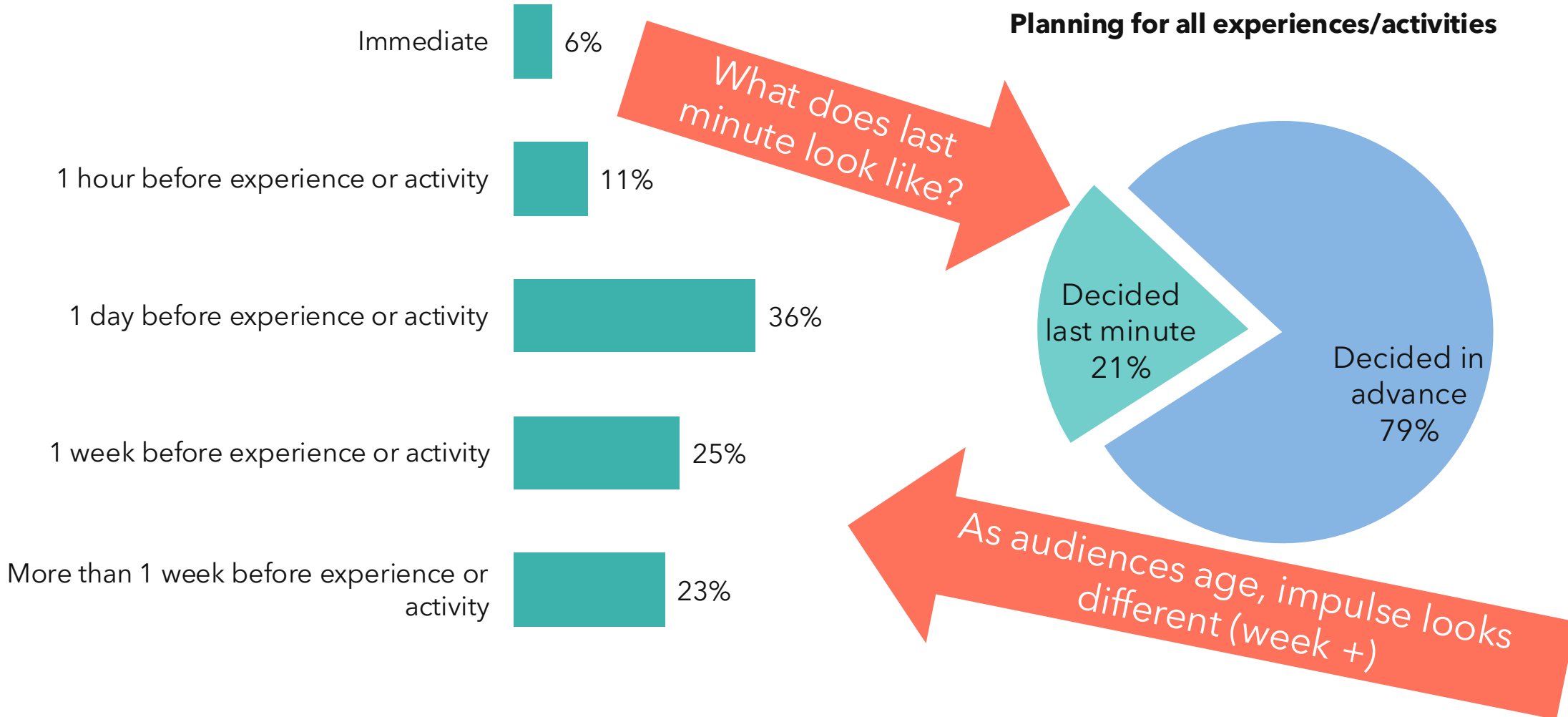
Who **does the research?**



# In most cases, the final decision is shared. Just like the experience.

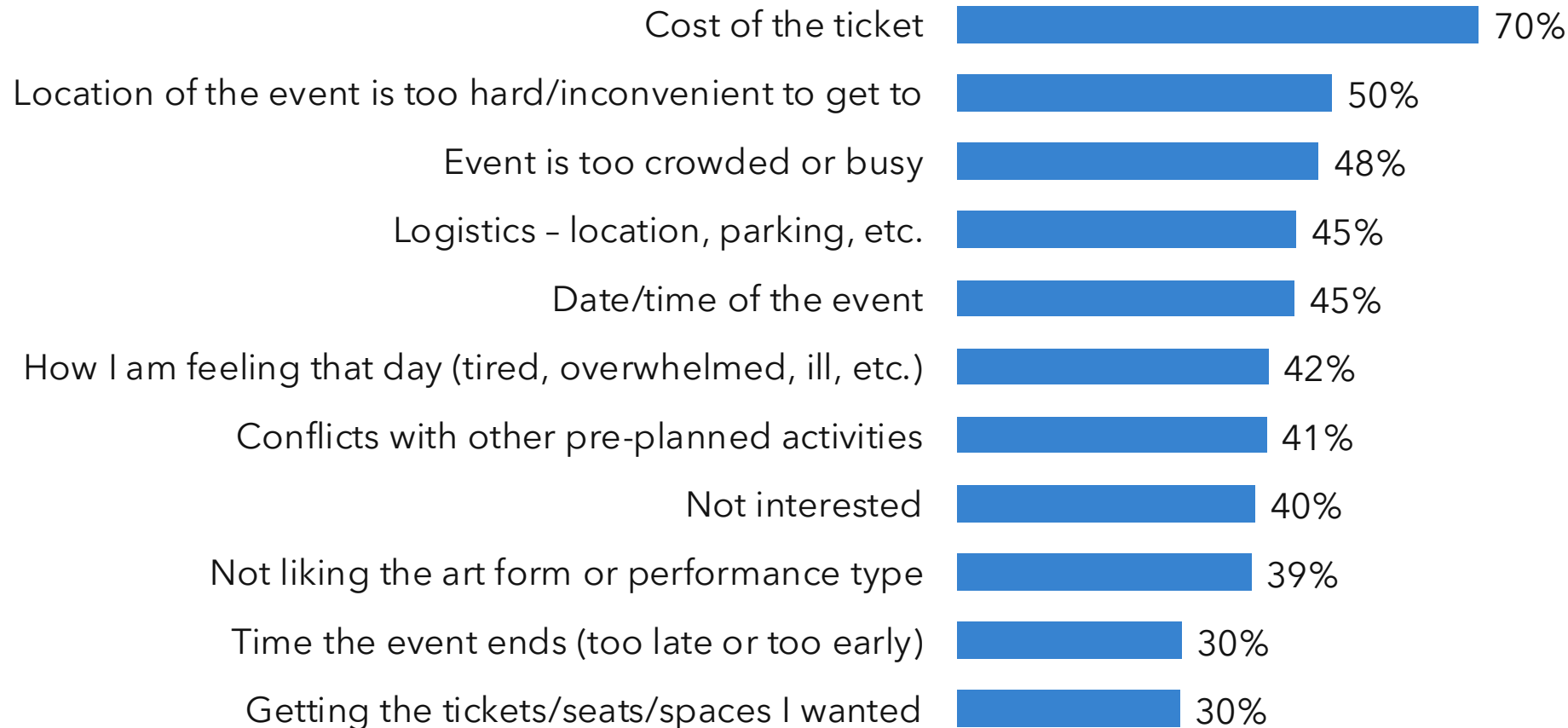


# Consumers appear to make decisions in advance, but may be only committing at the very end.



# While cost is an obvious factor, things like friction, overly crowded, and logistics are key too.

## Factors that impact consideration



**0.5%**  
mention  
cost as the  
only reason  
to not  
consider an  
activity.

# What are the top things that can inspire an impulse decision?

## Shareable

Being invited by a friend or family member  
**59%**

## Promise of Quality

Knowing the experiences would be of high quality  
**29%**

## Word of Mouth

Hearing others talk about the experience  
**24%**

## Uniqueness

Seeing an offer of a unique/exclusive experience  
**22%**

## Savings

Seeing an offer that promised significant savings  
**22%**



# Making Choices



Consumers may be making decisions later, but they are planning. The journey may not be shorter – just different.



Decisions and planning are also shared. You may have to show the **shared** benefits.



Persuasion can hinge on inspiration (shareable, quality, uniqueness) but also resolving barriers (value, friction, logistics)

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, looking upwards and reaching their right arm towards the top of the frame. On the right, a person is walking away from the viewer, carrying a long, thin object, possibly a cane or a walking stick, over their shoulder.

**What can you take away  
from all this?**





## Widening our reach and diversifying connections with audiences can be a matter of shifting consumer behaviour.

1. **Easy:** Besides cost, hassle is a key factor. Think of **all** the friction points.

Learn more >



Followed by [redacted] and 13.1K others

calgaryphil Where will I park? What if I clap at the wrong moment? Can I wear Crocs?

Taking in a performance at the #CalgaryPhil is meant to be a joyful — not stressful — experience. So don't worry, we've got you covered with the answers to a few of our most frequently asked concert questions.

(and, yes, you can wear Crocs 😊)



## Widening our reach and diversifying connections with audiences can be a matter of shifting consumer behaviour.

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- 2. Attractive:** Consumers may have less money to spend, but their decision journey starts with the inspiration of an experience. Help them see it.



## Contemporary Kids: My Chess, My Rules

October 20 + 27

1-2:30 PM or 3-4:30 PM

Join us for the Chess making Workshop inspired by Marcel Dzama's exhibition [Ghosts of Canoe Lake](#).

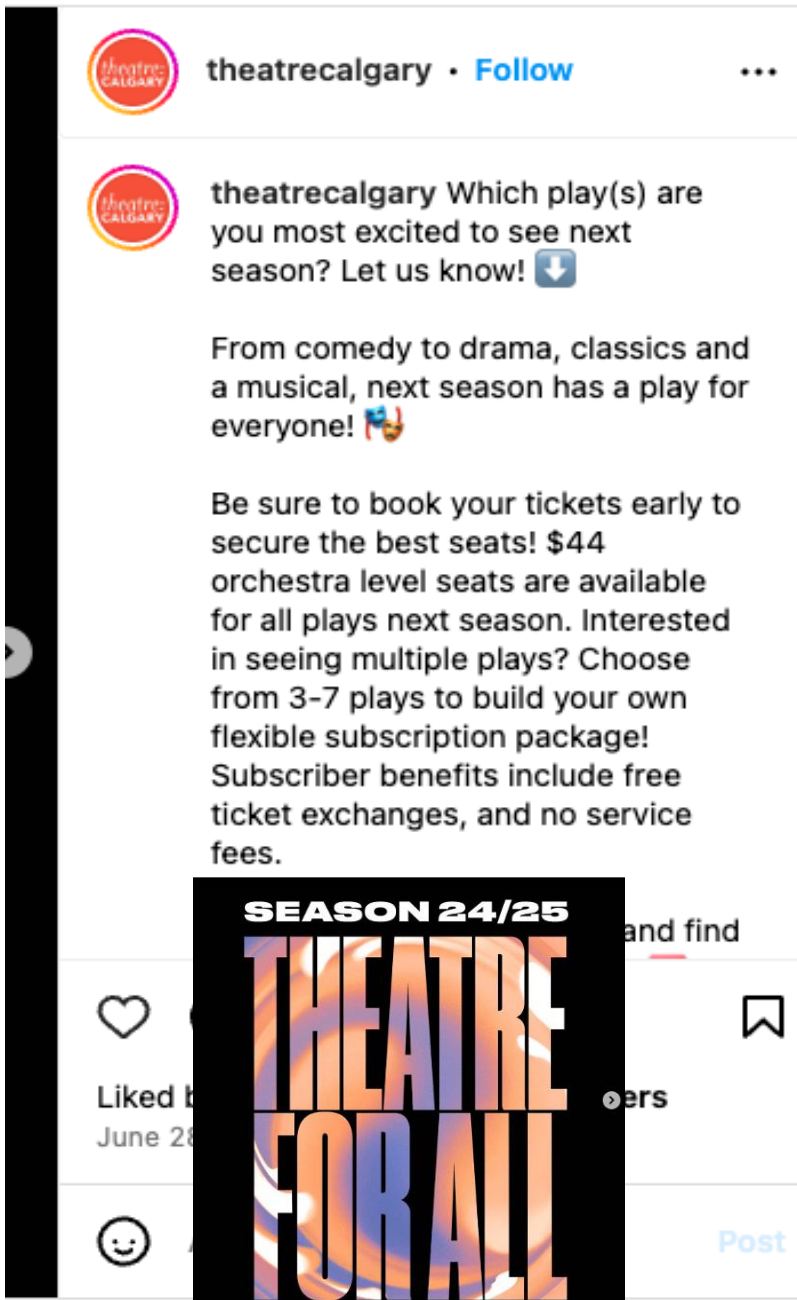
This hands-on workshop invites kids to design their own custom chess boards, create whimsical pieces, and invent fun new rules—like a king who loves to cook or a knight who enjoys dancing. Inspired by Marcel Dzama's video work, children will reimagine traditional chess, using their creations to tell unique stories and infuse the game with humour, fantasy, and personal flair.

Our free onsite Contemporary Kids programs invite children to learn about modern and contemporary art through unique and engaging art activities.

For children ages 5-12. Maximum group of 30 children, with one guardian per child. Questions? [Please visit our FAQ page](#).

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Your input helps design future phases.

