

Spotlight on Arts Audiences

Wave 4: Winter 2025

Calgary results

March 2025



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.**



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A collaborative and evolving resource

Purpose and Objectives:

As Alberta continues to recover from a pandemic five years ago that changed public life and reshaped the economy, market conditions continue to be volatile and unpredictable. This work was developed exclusively for the arts sector to help arts organizations understand the market and their audiences. 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 4:

- Explore general interest in the arts/current levels of arts participation
- Capture updated understanding of consumer mindset
- Assess how well consumers expectations are being met in the arts
- Explore methods to inspire potential audiences (mid-funnel marketing)

How to use this report:

- This work is designed to be shared and applied. We encourage our partners to distribute and actively apply the insights to their business.
- Incorporate your data to deepen the application of this information for your needs. Adding ticket sales data or audience profiling helps extend and customize the insights for your organization.



Research Approach

This report represents the fourth 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.

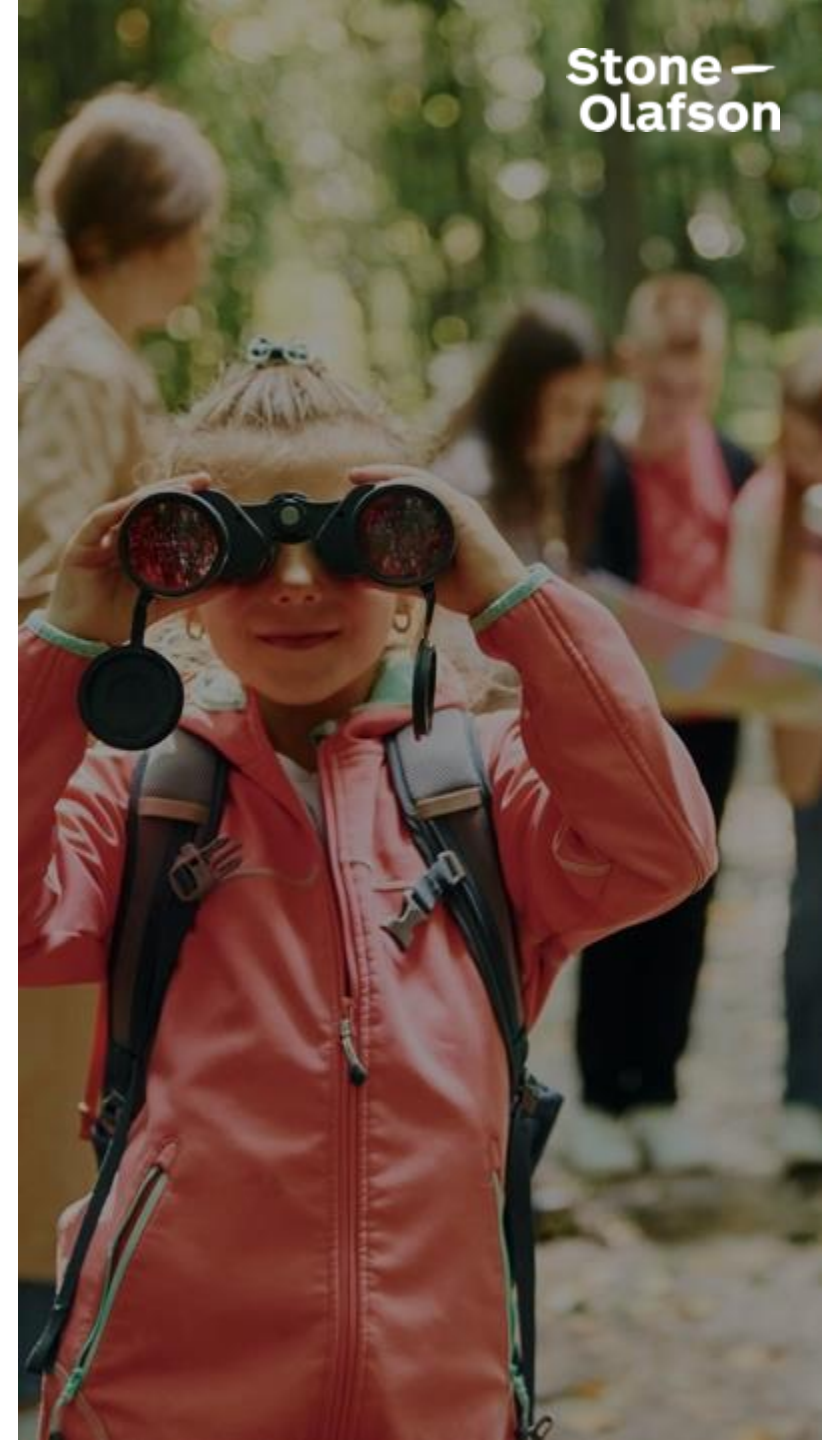
A total of n=1,160 surveys were collected across the following regions:

- **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 January 17th - 27th, 2025.

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 **Calgary region** only. Results are shown alongside total results to provide a directional comparison to other areas of the province.





A reminder of what we've
learned so far

Each phase of this work is designed to build on what we learned before. Outcomes do not replace findings from earlier phases. This research is most useful when all waves are considered. Some important points from previous waves:



1. Not everyone engages to the same degree. We know we already attract audiences who are deeply engaged or immersed in the arts. Our goal is to inspire more connections with the 51% who are passively engaged.



2. There are two currencies of engagement: time and money. And competition for the 16 hours a week and the \$200/month is fierce.



3. Showing value for time and money is not about dollars and cents – it's about emotional and personal resonance. Show the benefits of connecting and you will be able to show value in a more meaningful way.



4. Arts education can be a valuable way to attract more audiences but it's about the benefits (experience, enjoyment, memorable, novel) more than the learning.



5. Affordability is a challenge that is not going away. Spending is constrained but it is happening. Offering savings is helpful but it's not the whole story. Remember to also talk about the return on their investment – which are the benefits.



6. The planning window has shortened, and audiences are committing much closer to the event. But they are considering it way before they choose to commit. Inspire consideration early but be ready for a last-minute decision.



What are we seeing
this winter?

The mindset of Albertans has shifted decidedly negative...

- A lack of economic stability and ongoing uncertainty is causing difficulties for Albertans. This is leading to feelings of lethargy and unease, which creates a challenge to showcase the value of experiential offerings to residents who are becoming more and more strict about their time and money.
- In the midst of challenging conditions, this data shows how important arts and culture are to the overall health of the community and helping audiences deal with uncertainty. The effort put forth by artists and those within the experience economy positively impact one's attitudes. The arts are, in effect, a salve.
- Albertans are clear: our communities need to come together now more than ever. Given the ability of arts experiences to bring people together, arts and cultural experiences are essential for one's quality of life.
- Why does this matter? Albertans want an escape, to have fun, but they remain sensitive to economic conditions. They want to know exactly what they are getting, and how easy it will be. Your tone, language, and specific message must cater to these variables.



...which leads to some unique considerations as you look to engage them

- Albertans are tired, uneasy, and pessimistic, but they also believe **arts and cultural experiences are important for the quality of life** within the community.
- These **negative emotions are largely tied to weakened personal economics** for many and general instability that is very prominent right now.
- But audiences also **recognize that arts and culture are essential to their community**—offering an opportunity to escape negativity, feel connected, and experience joy.
- 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.
- Remember, Albertans are busy and stressed. As they look for things to do, **they want to know exactly what to expect, and how much it's going to cost**. Be upfront and make it easy.
- **Passive audiences are naturally less informed** than those who are more engaged. They also tend to receive and retain information differently. Building basic awareness with more direct and traditional media like community signage, news media, and billboards will be important.



AUDIENCE

What does this mean for arts organizations?

While this is a period of significant uncertainty, there are real opportunities for enhancing your marketing and engagement activities. Those that build relationships with their audience now are most likely to grow when things are more stable and positive.

- 1. Be empathetic:** The audience is in a difficult spot and marketing choices need to take this into consideration. Recognize they are likely to respond best to those messages and opportunities that alleviate their current state of mind. Comfort, reassurance, levity and appealing to their motivations will be key.
- 2. Be nimble:** Conditions are changing quickly. Consider a strategy that incorporates room for timely messages that can reflect external conditions and resonate with audiences.
- 3. Getting the attention of passives:** Your loyal audiences are likely only going to need a reminder. Reaching new and passive audiences are going to need more – it will be important to get their attention first with media that can reach – radio and out-of-home can be cost-effective for achieving this.
- 4. Continuing the focus on simple sequences of messages:**
 - ✓ Show the experience and benefits first. This is not the activity. This is what people will feel, experience or get out of the engagement.
 - ✓ Make the value clear: financial stresses are paramount right now. Show value, promotions or offers that can incent audiences who may have less to spend. (Perceptions of good value will climb when this follows the promise of experience and benefits.)
 - ✓ Make it easy: Build on findings from the last wave and make their planning easy – give the information they need to have a hassle-free experience. This can help audiences with limited time to invest.
 - ✓ Help them see themselves in the activity: This is where you can show the activity – but where possible put them in it.

- 1. Take a holistic approach to the experience:** Audiences – particularly the passive ones, are there for more than the artistic offer. Their motivations are broader and want the whole experience: escape, social, emotional, etc. Critically review the ENTIRE experience from early stages of planning to going home afterwards and identify any features that inhibit their motivations and strive to address them.
 - For example: Digital tools that make it difficult to plan create frustration and inhibit experiences.
 - For example: line-ups that increase angst or cause patrons to wonder if they will have enough time to be served create uncertainty. (The uncertainty they are looking to escape from.) That has a negative impact on experiences.
- 2. Adjust experiences to reflect motivations for different kinds of activities:** People will engage with different types of experiences for different reasons – identify how you can cater to those.
 - Recognize those that want to DO (arts education, creation) are mostly looking for escape, novelty and social.
 - Those ATTENDING (performances, events, festivals) are looking for social, positive and escapist benefits.
 - Those simply OBSERVING (media, galleries) are there for contentment and relaxation.

What is different in Calgary this winter?

In short, attitudes and perceptions are quite consistent across the province (which we have seen before). Where Calgarians show some differences is with respect to their outlook on finances and the activities they participate in.

1

Calgarians display similar attitudes and perspective on overall mood in their community but experience slightly more gratitude. They are also slightly more optimistic about their personal financial situation over the next year.

2

Calgarians engage in activities at a similar rate to the rest of province but do go to community festivals more often, which might reflect the number of festival offerings in the region.

3

Calgarians are also slightly more likely to indicate a willingness to try new arts experiences (although it is not pronounced – 54% vs. 51% for the rest of Alberta).

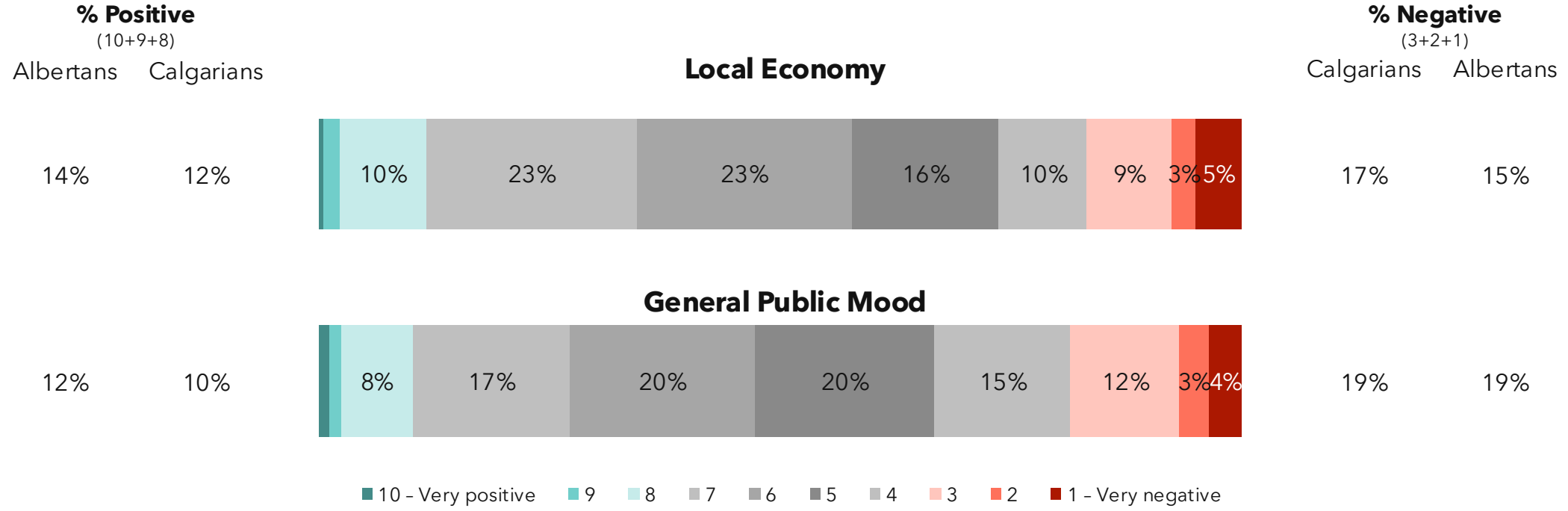
Understanding Community Sentiment





The majority of Calgarians have a neutral general mood

This is similar to all Albertans and suggests a level of ambivalence in the current state. Residents may be taking a pragmatic approach as they deal with an uncertain future.



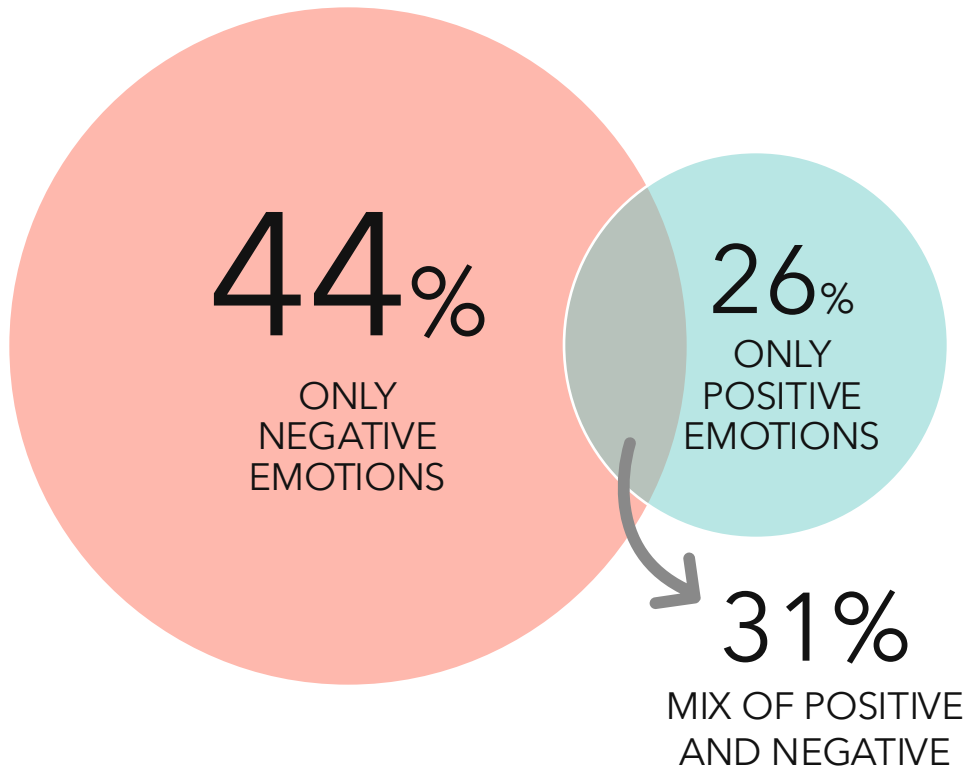
Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)
 Q10.. Using a scale of 1 to 10 where 1 is very negative and 10 is very positive, how would you rate both the local economy and the general public mood in your community?



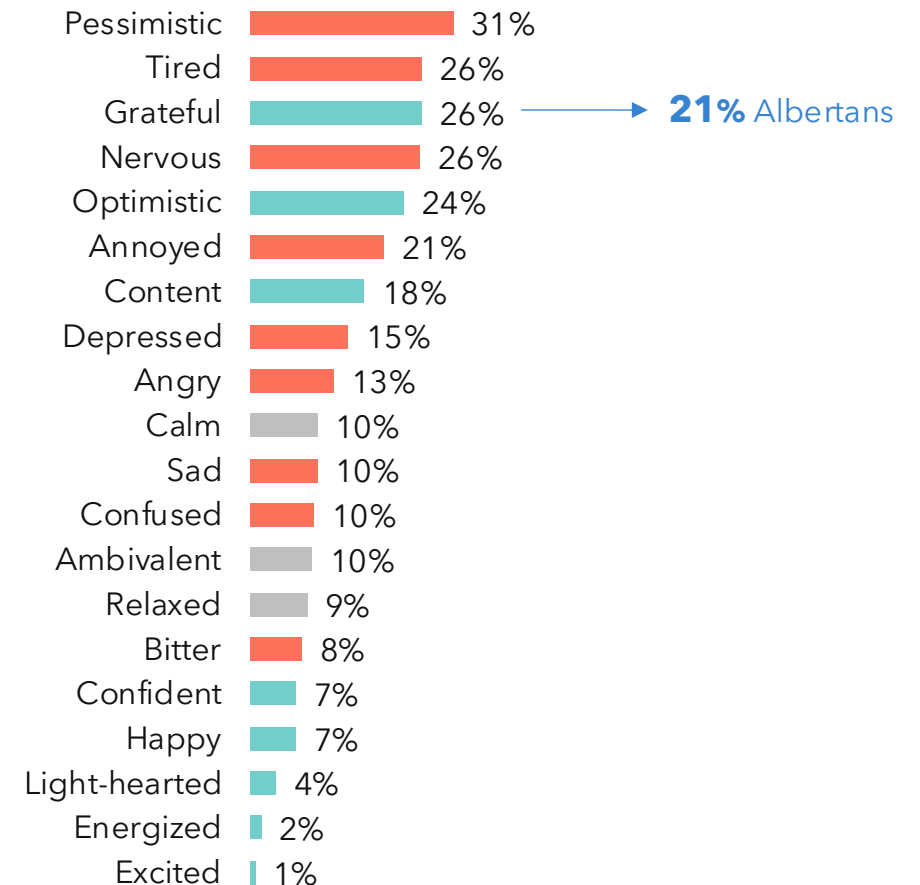
Attitudes are generally negative, as with the rest of Alberta

Calgarians are more grateful when thinking about their life and community than Albertans overall but otherwise exhibit generally similar attitudes.

Current State of Mind



Feelings Towards Life and Community



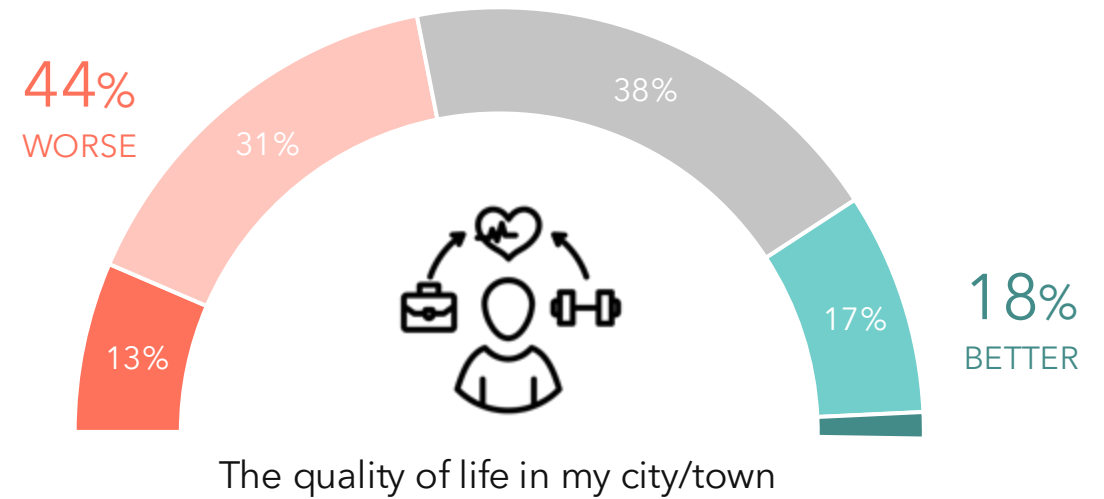
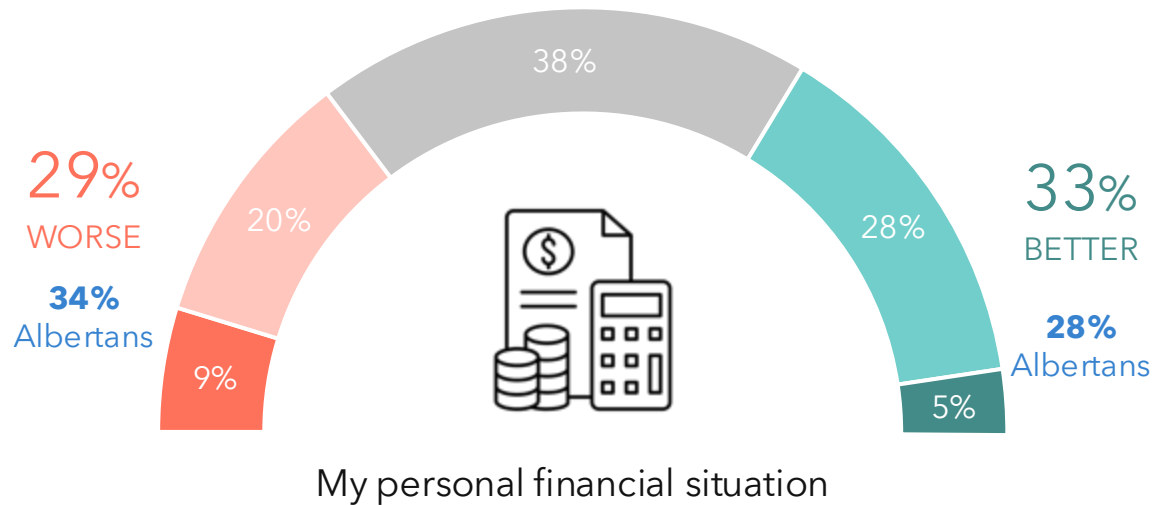
Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)

Q11. When it comes to how you are feeling about life and your community in general, what word or words would you use to describe your overall mood? Select up to 3 choices (please scroll to see the full list)



And while there is a more negative view for the future of their quality of life, Calgarians are more optimistic about their financial situation in the year ahead compared to the rest of Alberta.

Personal and Community Outlook



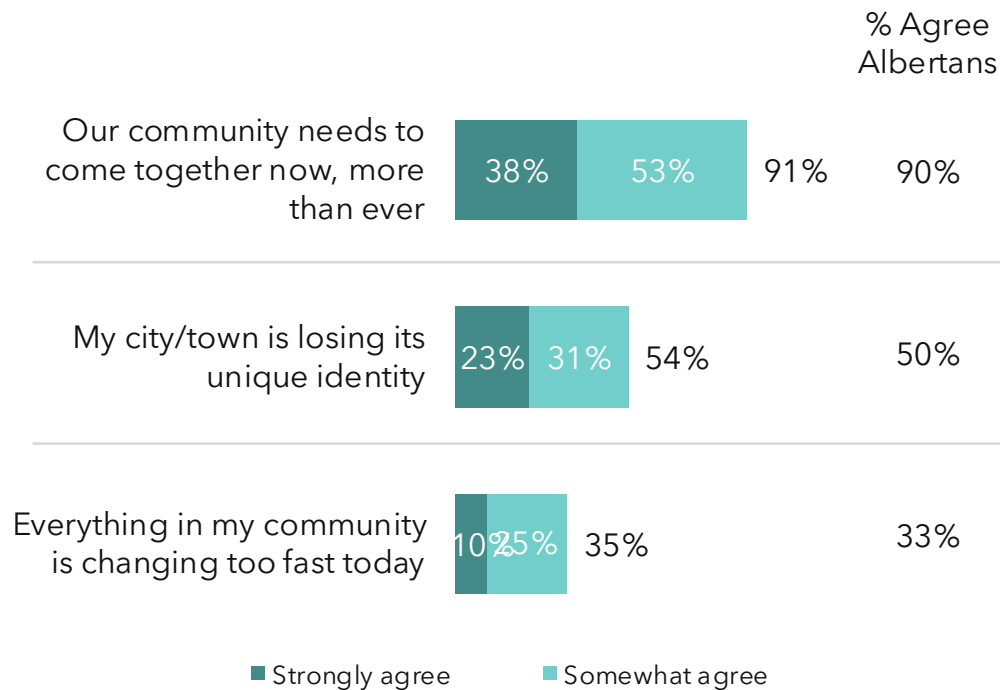
■ Get a lot worse ■ Get a little worse ■ Stay the same ■ Get a little better ■ Get a lot better

Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)
Q12. Now thinking ahead over the next year, how do you think things will be for the following for you and in your local community?

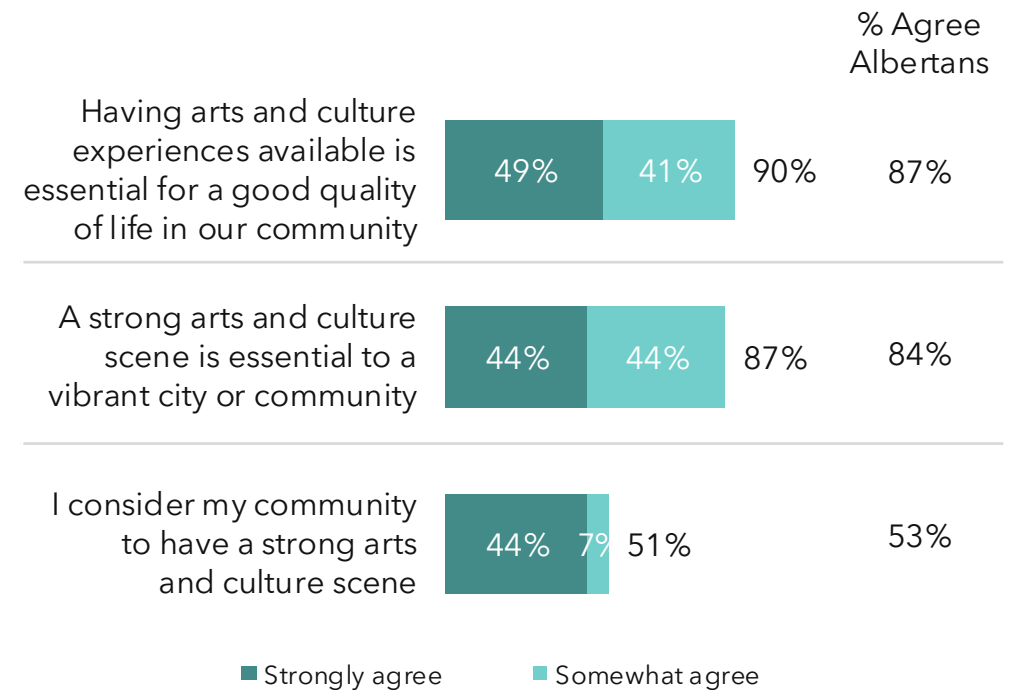


Attitudes reinforce the need for arts and culture experiences and togetherness in Calgary

General Community Perceptions



Perceptions of Arts and Culture in Community Today



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

Q13. Below are a series of statements that could be made about your community and things to do. Please indicate if you agree or disagree with each statement



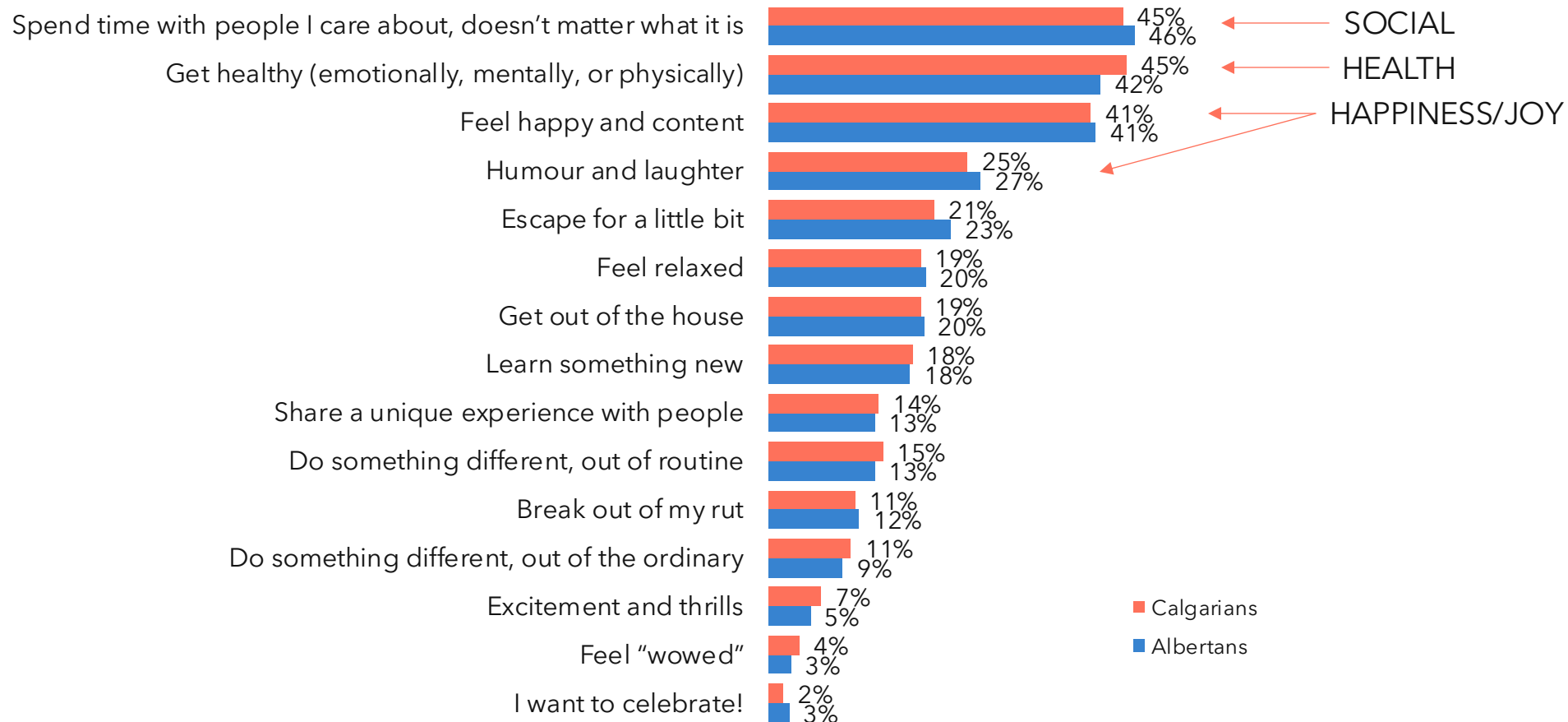
**What benefits can the arts
provide?**



Desired outcomes are similar across the province; most look for social benefits and positive emotional relief

Desired Outcome From Activities

RANKED TOP THREE



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

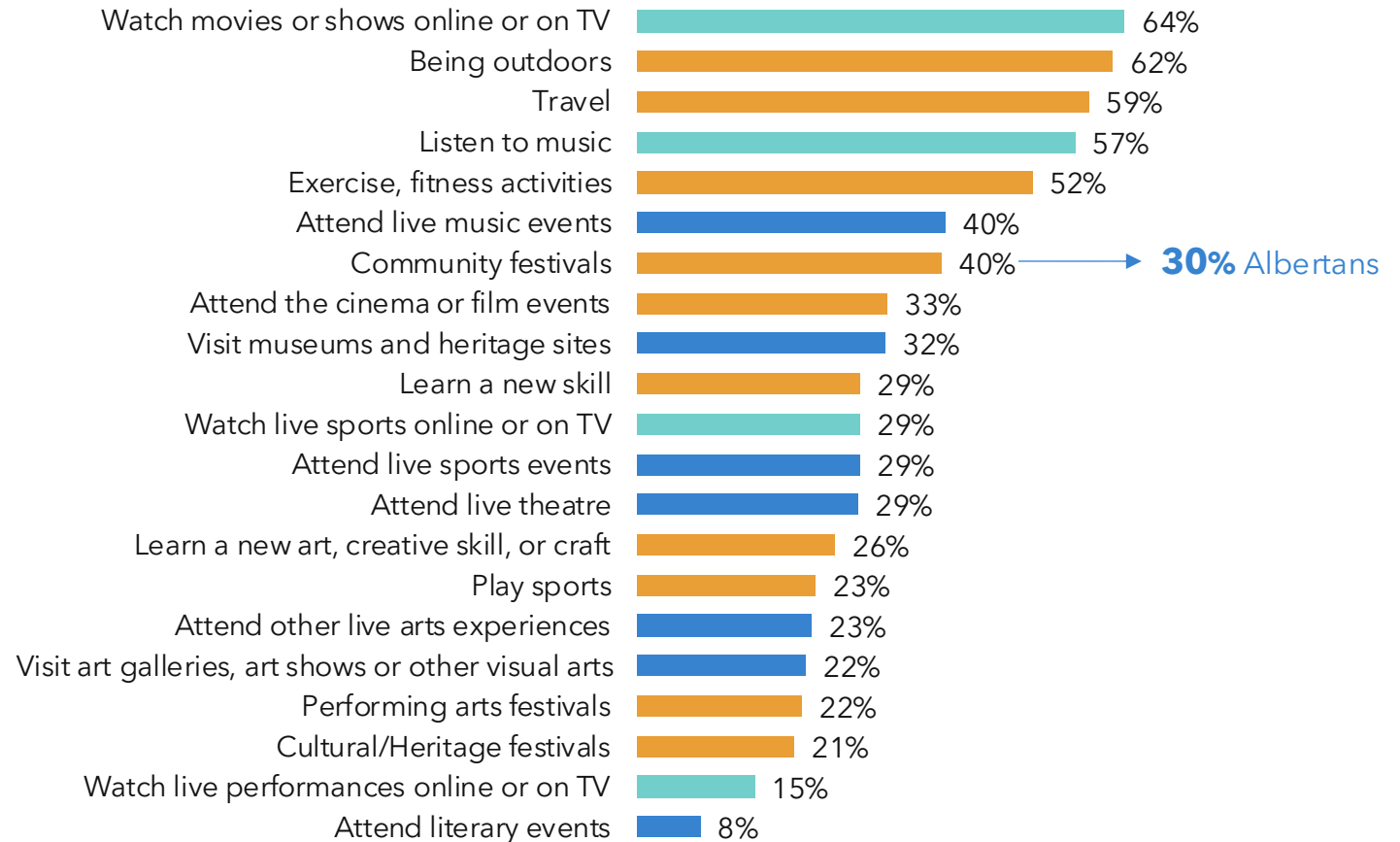
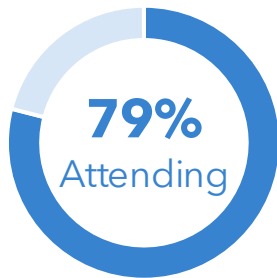
Q14. When you think about doing activities that you love to do, what are the things you MOST want to feel or get out of the activity, given your current mood right now? Select and rank up to three, in order of importance with 1 being the most important thing you want, 2 being the second most important, and 3 being the third most important - 1 + 2 + 3



To achieve social and emotional outcomes, Calgarians engage in a variety of activities

They do, observe, and attend at similar rates to all Albertans, but Calgarians are going to community festivals more often which is likely due to the availability of festivals in Calgary.

What are Calgarians doing?



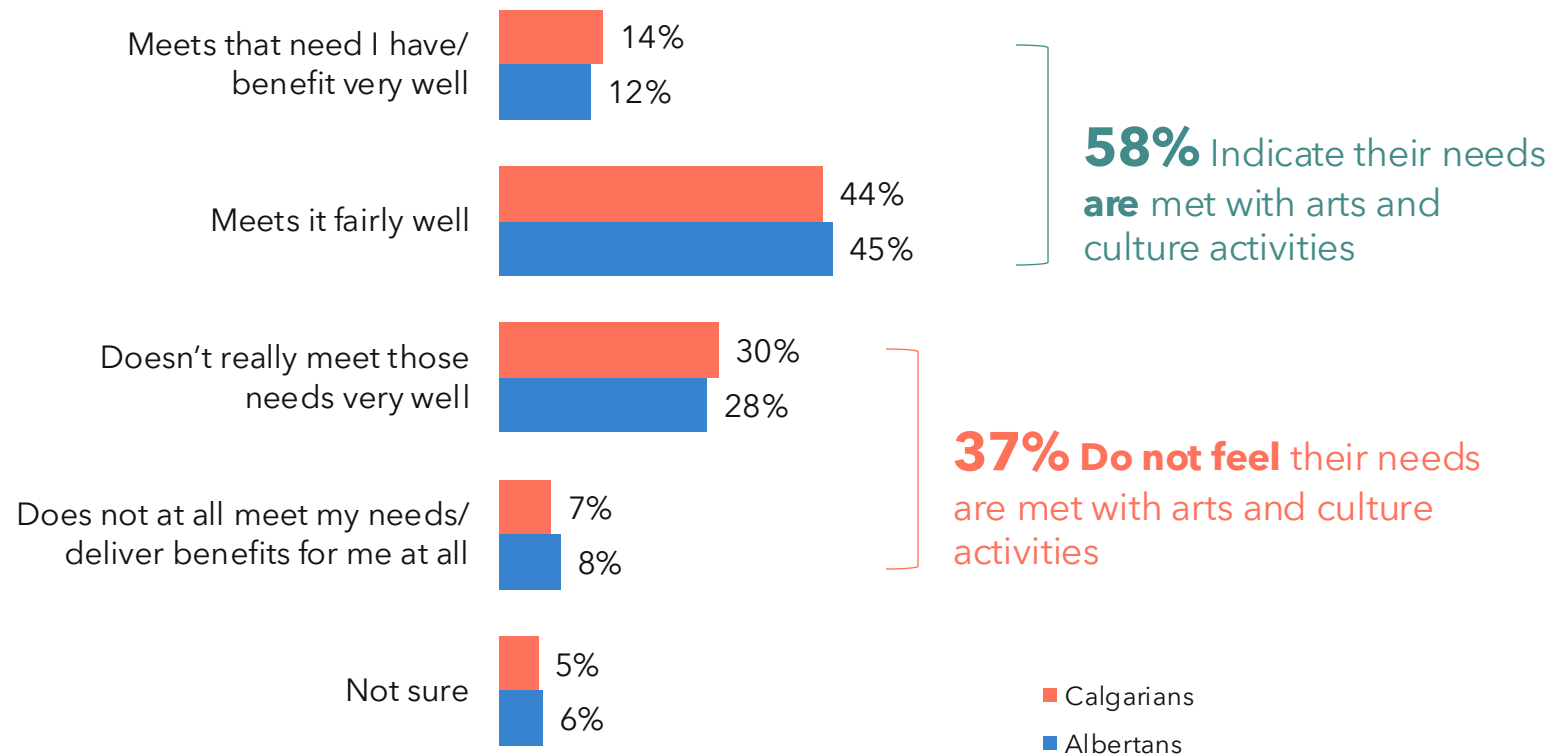
Base: Selected at least one activity at Q14 - Calgarians (n=397); Albertans (n=1,148)

Q15. What types of activities do you regularly do to achieve the outcomes you selected (listed below)? Select as many as apply that help you get what you are looking for.



There is a gap between the benefits Calgarians seek from doing, observing, and attending and how well those needs are being met by arts and culture experiences

Role of Arts and Culture to Achieve Outcomes



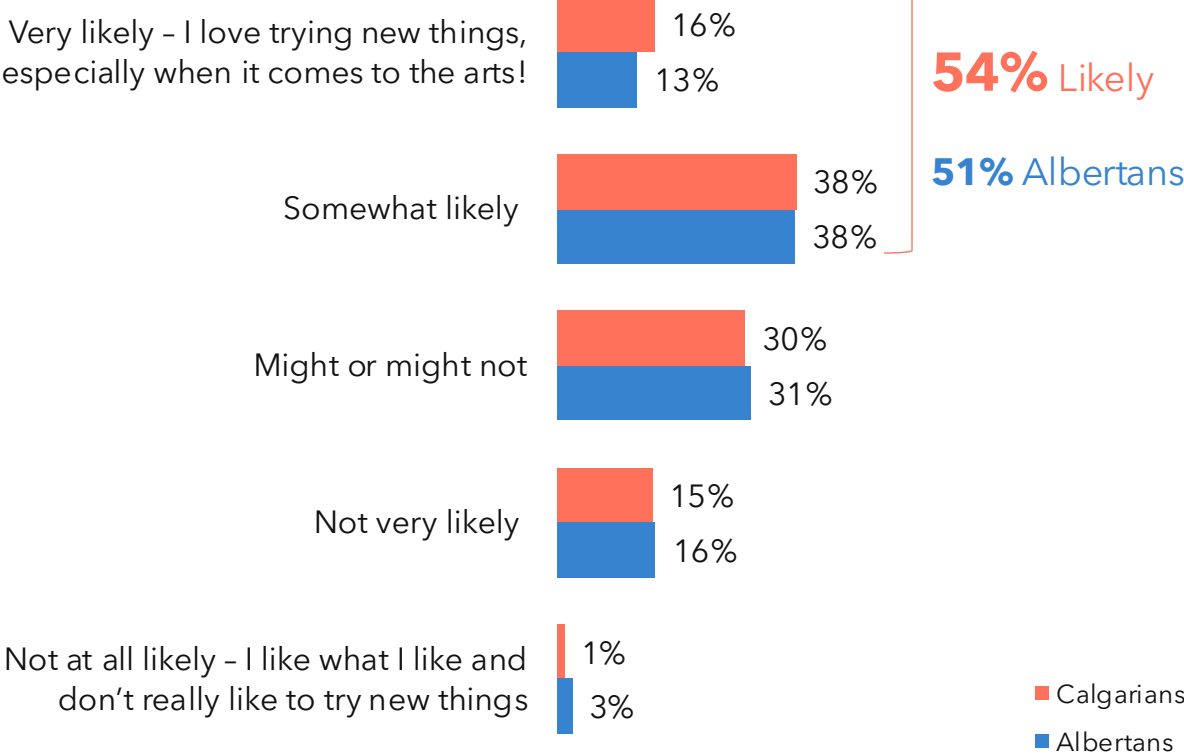
Base: Selected at least one activity at Q14 - Calgarians (n=397); Albertans (n=1,148)

Q16. Earlier you indicated [ANSWER FROM Q14] was the most important thing you were looking to get out of the activities you participate in. Overall, how well do the arts and culture activities you engage in meet that need? This could be any arts and cultural experience, activity, event you participate in, or event you attend.



But slightly more Calgarians are willing to try new arts experiences

Likelihood to Try a New Arts Experience

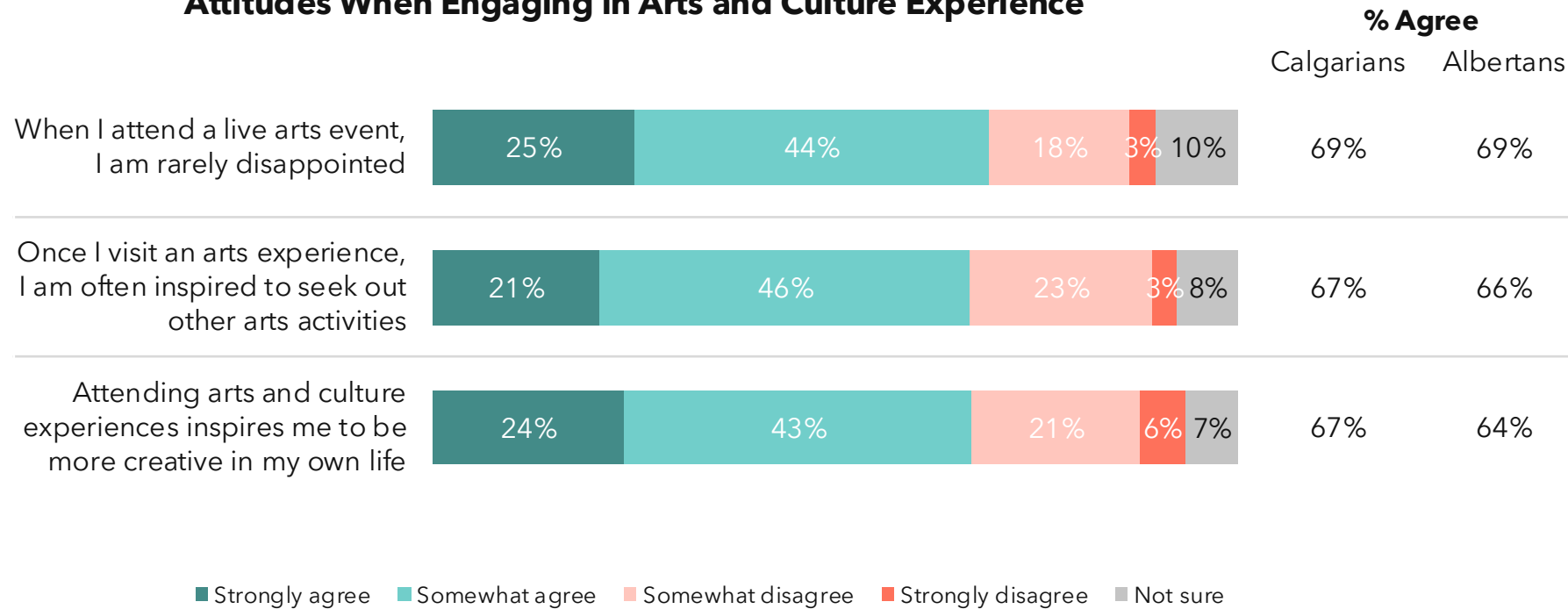


Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)
 Q18. How likely are you to try a brand-new arts experience (a show, exhibit, or even a new art form) that you have never done or seen before?



Most Calgarians report that they are inspired to seek other arts experiences or explore their own creativity after engaging with the arts

Attitudes When Engaging in Arts and Culture Experience



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

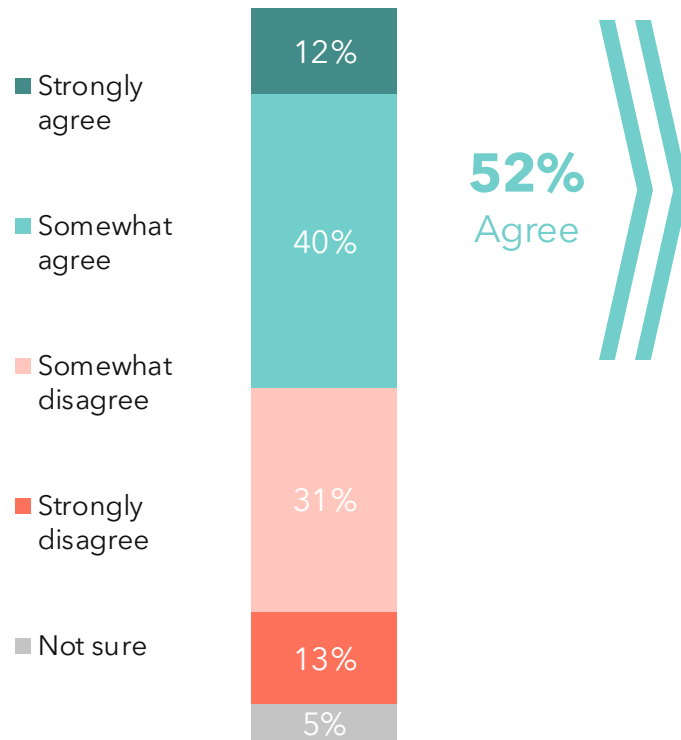
Q19. Below are a series of statements about arts and culture related experiences. Please indicate your level of agreement with each statement



The lack of knowledge is a barrier for some Calgarians to engage in the arts more

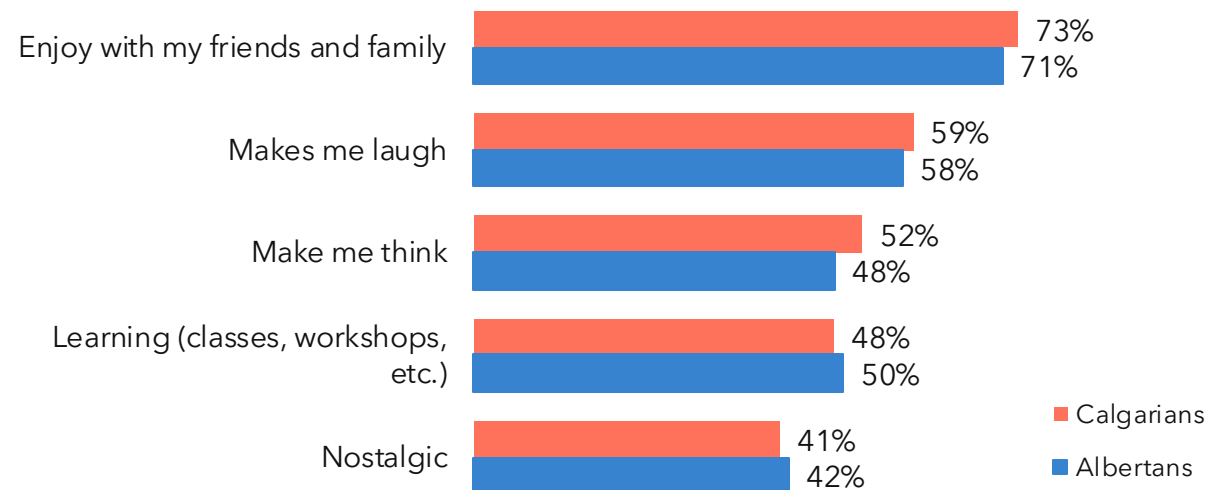
Of those who don't know where to start, messages about social enjoyment and humour are most appealing.

I would like to engage with the arts more, but I just don't know where to start



What would be appealing to those who want to engage more?

(selections of 40% or more)



Q19. Below are a series of statements about arts and culture related experiences. Please indicate your level of agreement with each statement Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)
 Q20. Which of the following arts related experiences are most appealing to you personally and would be something you would want to engage with more? Select all that apply. Base: Want to engage, but don't know where to start - Calgarians (n=207), Albertans (n=556)

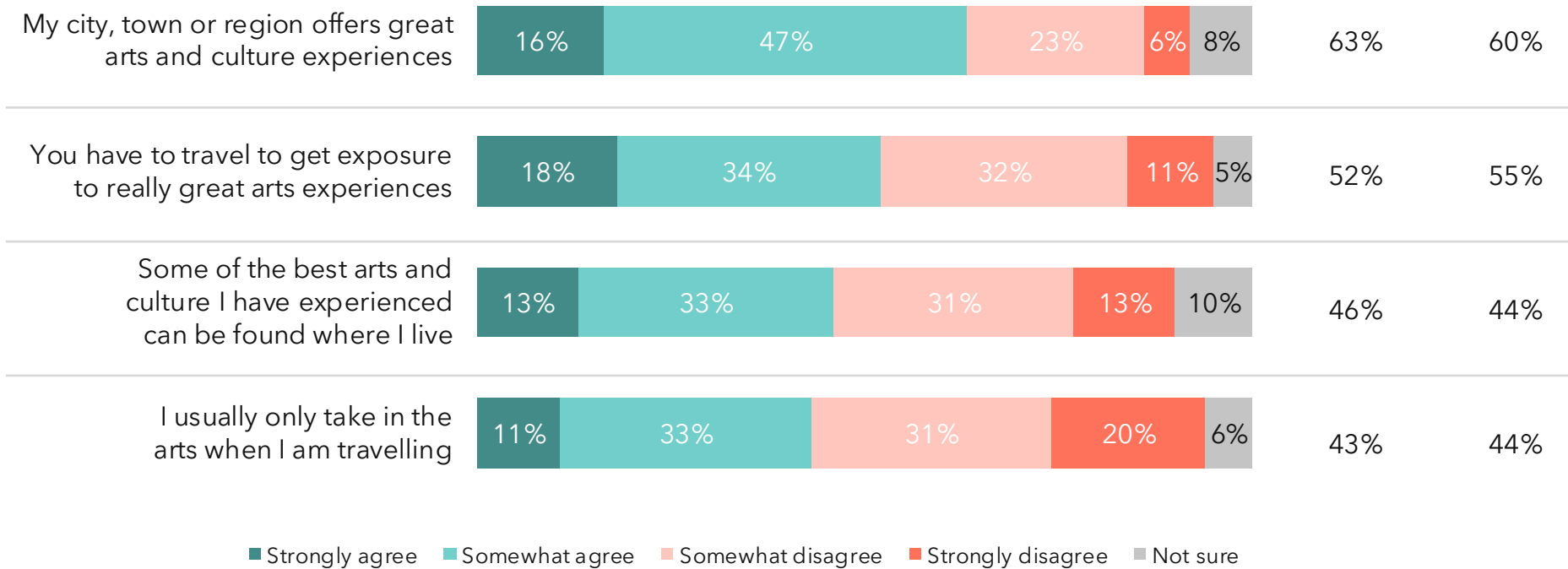


About half of Calgarians believe traveling is the best way to get exposure to the arts, but slightly more also indicate there are great *local* arts experiences

Perceptions of Quality Arts and Culture Experiences

% Agree

Calgarians Albertans



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

Q19. Below are a series of statements about arts and culture related experiences. Please indicate your level of agreement with each statement

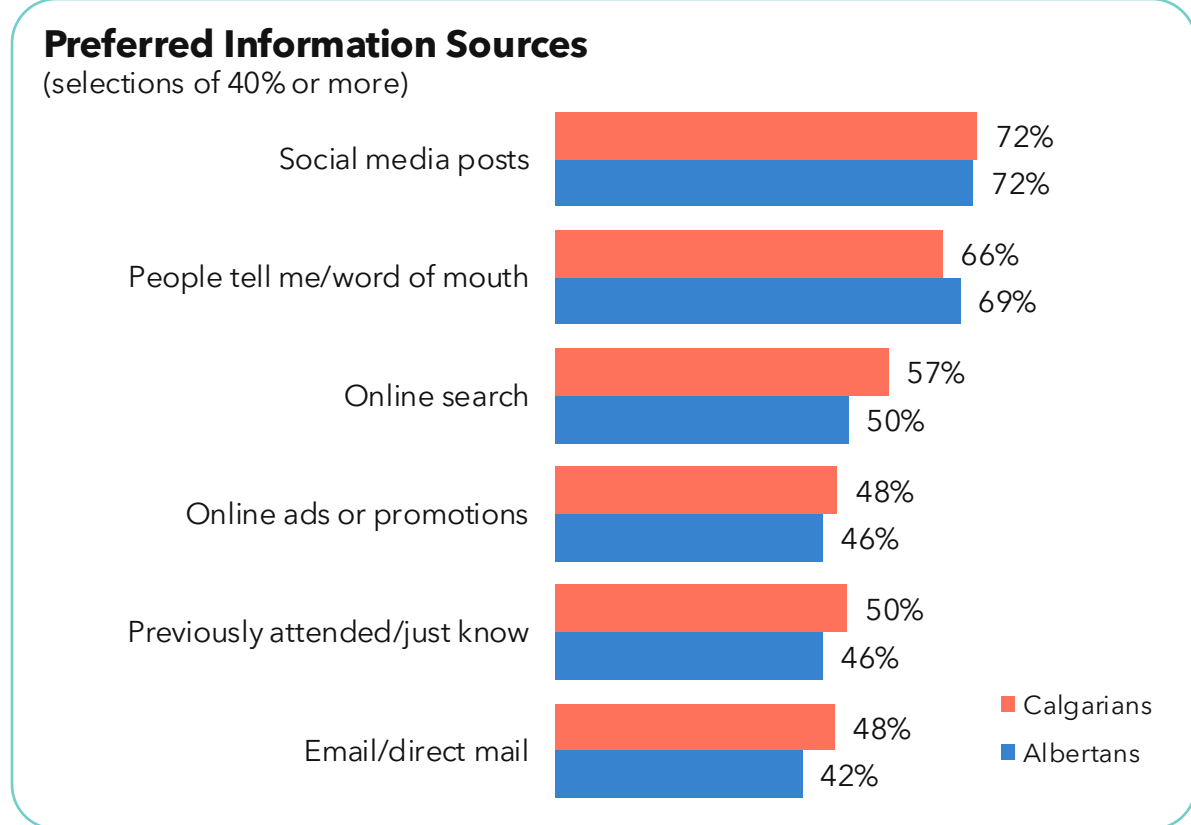
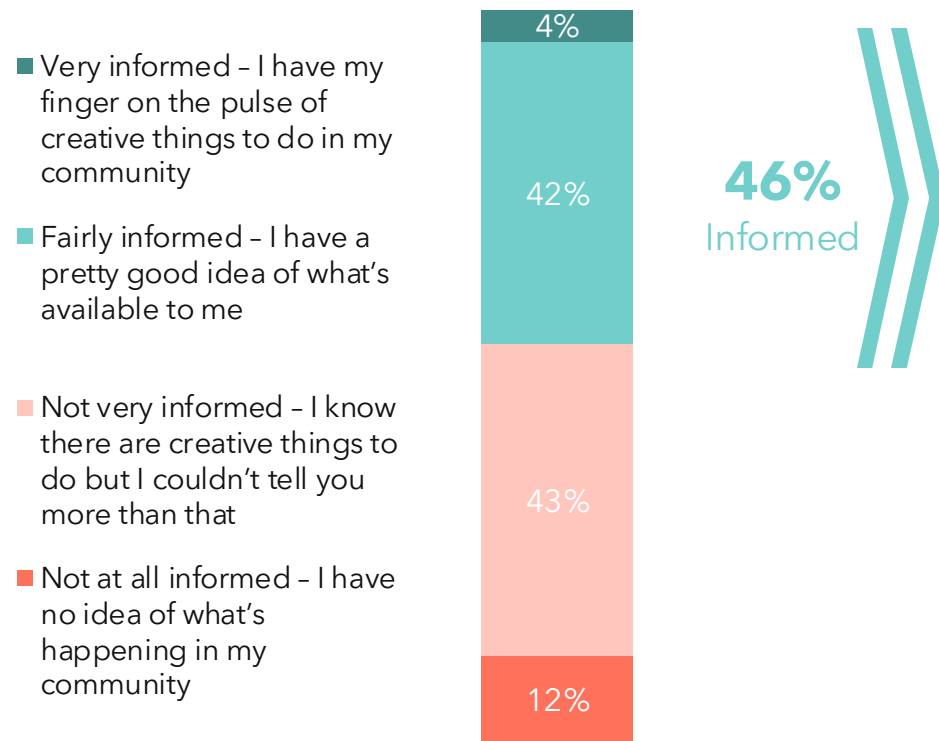
Informing and Inspiring Audiences





For Calgarians who consider themselves “in the know”, they rely on social media and WOM to hear about upcoming experiences

“In the know” on Arts and Culture Experiences



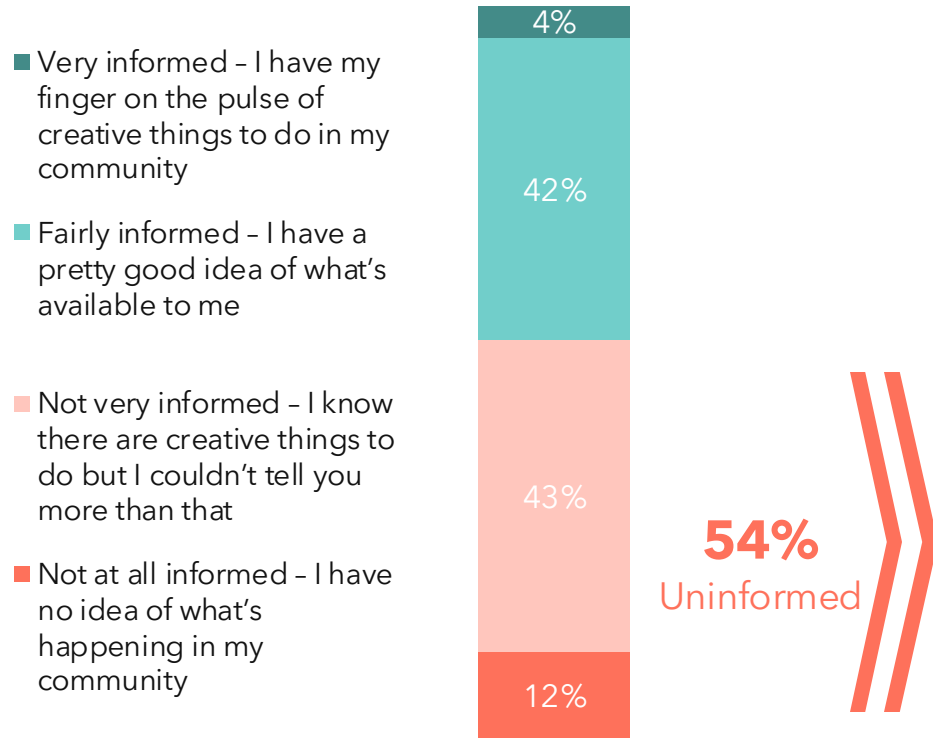
Q21. When it comes to arts and culture experiences, how informed or 'in the know' do you consider yourself to be? Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)

Q22. Where do you get your information on what experiences and activities are happening in your community? Select all that apply. Base: Informed or on arts and culture experiences - Calgarians (n=184); Albertans (n=570)



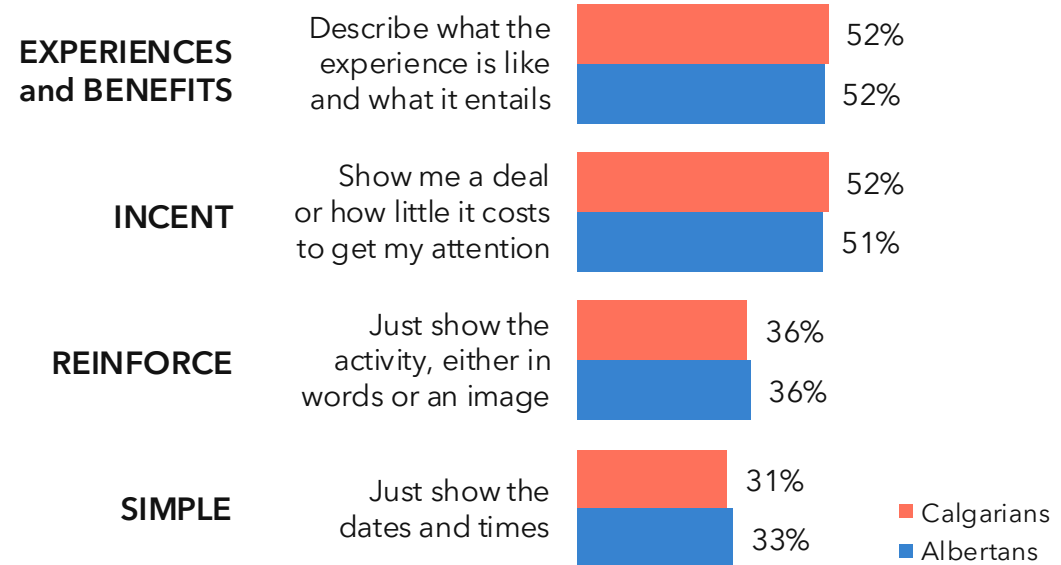
For those less informed, there is a need to communicate basics: lead with the promise of experience, benefits and value

“In the know” on Arts and Culture Experiences



Communication Strategies to Get Attention

(selections of 30% or more)



Q21. When it comes to arts and culture experiences, how informed or 'in the know' do you consider yourself to be? Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)

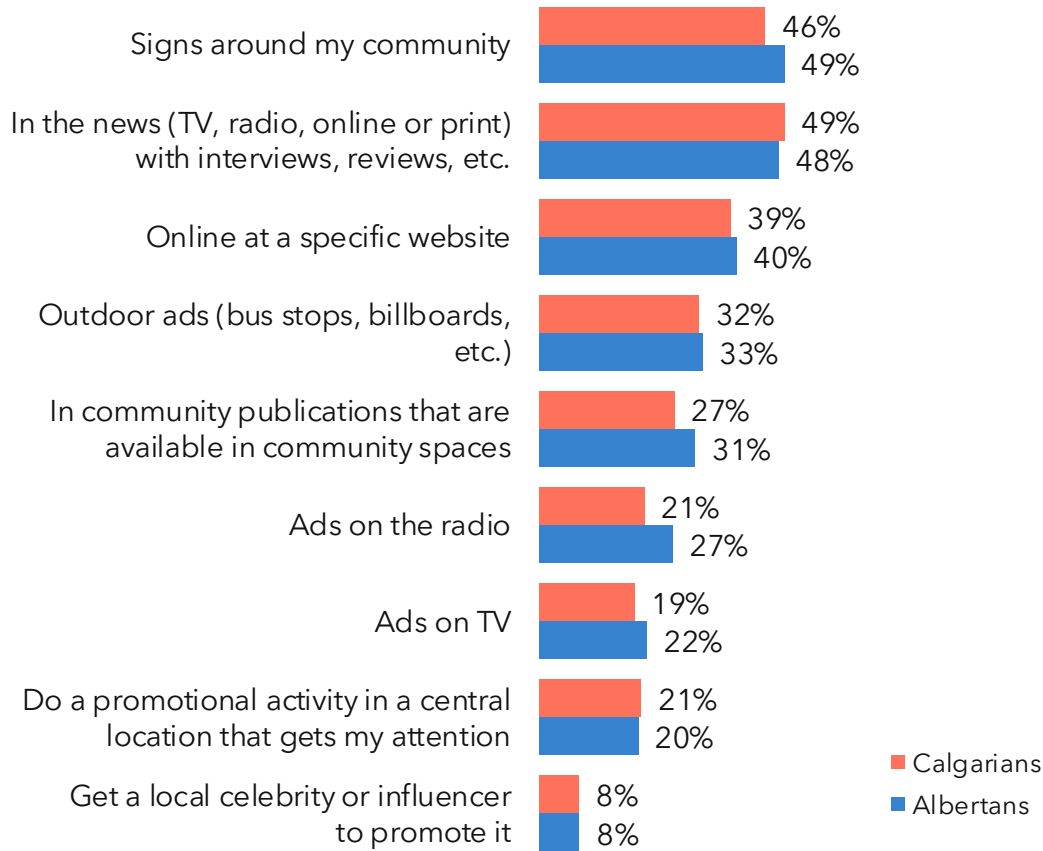
Q23. If a company wanted to get your attention about an activity, event or experience, what would they have to do or say? Please select up to three. Base: Uninformed on arts and culture experiences - Calgarians (n=216), Albertans (n=590)



Where to capture attention? And, what can be leveraged for the consideration phase?

Even though Calgarians have a more positive outlook on their financial situation than others in Alberta, deals are enticing. In addition, ensuring people know how to get there and where to park and offering multiple dates and times can create more opportunities to convert. Consider which levers to pull to eliminate any barriers that exist in the decision process.

Channel Strategies to Get Attention




Elements to Entice Final Decisions to Participate



Q24. If an arts company that you didn't know about wanted to make you aware of a remarkable experience, where would they be most likely to get your attention? Select all that apply.

Q25. What should organizations be doing to finalize your decision to spend your time or money with them? Select up to three choices Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)

Respondent Profile





Respondent Profile

Gender



51% 48%



46% 48%

Another gender / Prefer not to say 3% 3%

Age

34% 27%



18-34 years

37% 34%



35-54 years

30% 40%



55+ years

Diversity / Identity

Indigenous, First Nations, Metis, Inuk (Inuit) 3% 4%

Moved to Canada in the last 5 years 4% 2%

Identify as a visible minority 14% 10%

Seniors over 65 live in my household 19% 24%

Identify as LGBTQ2S+ 12% 10%

Physical or mental disability in my home 12% 14%

Born outside of Canada 18% 11%

Mental illness in my home 17% 15%

Employment

Employed full-time 49% 43%

Employed part-time 9% 9%

Self-employed 8% 8%

Unemployed 4% 5%

Student 5% 5%

Homemaker 2% 2%

Retired 21% 26%

Prefer not to answer 3% 2%

Household Income

Under \$50K 16% 17%

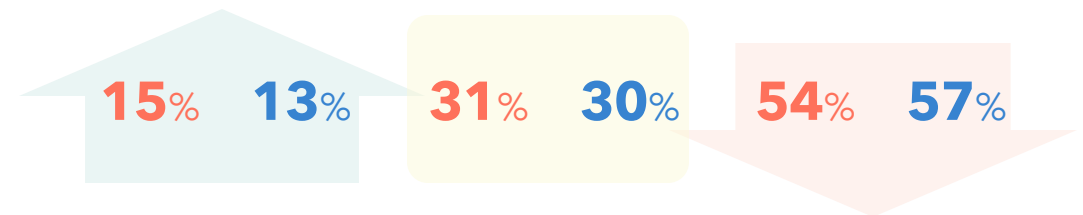
\$50K-\$100K 24% 27%

\$100K-\$200K 30% 29%

Over \$200K 11% 9%

Prefer not to say 17% 18%

Income Change PAST THREE YEARS



Increased

Unchanged

Decreased

Calgarians Albertans

Understanding people.

It's what we do.

**Stone —
Olafson**

Questions or Comments?

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