

# Spotlight on Arts Audiences

Wave 3: Summer/Fall 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 & Objectives:

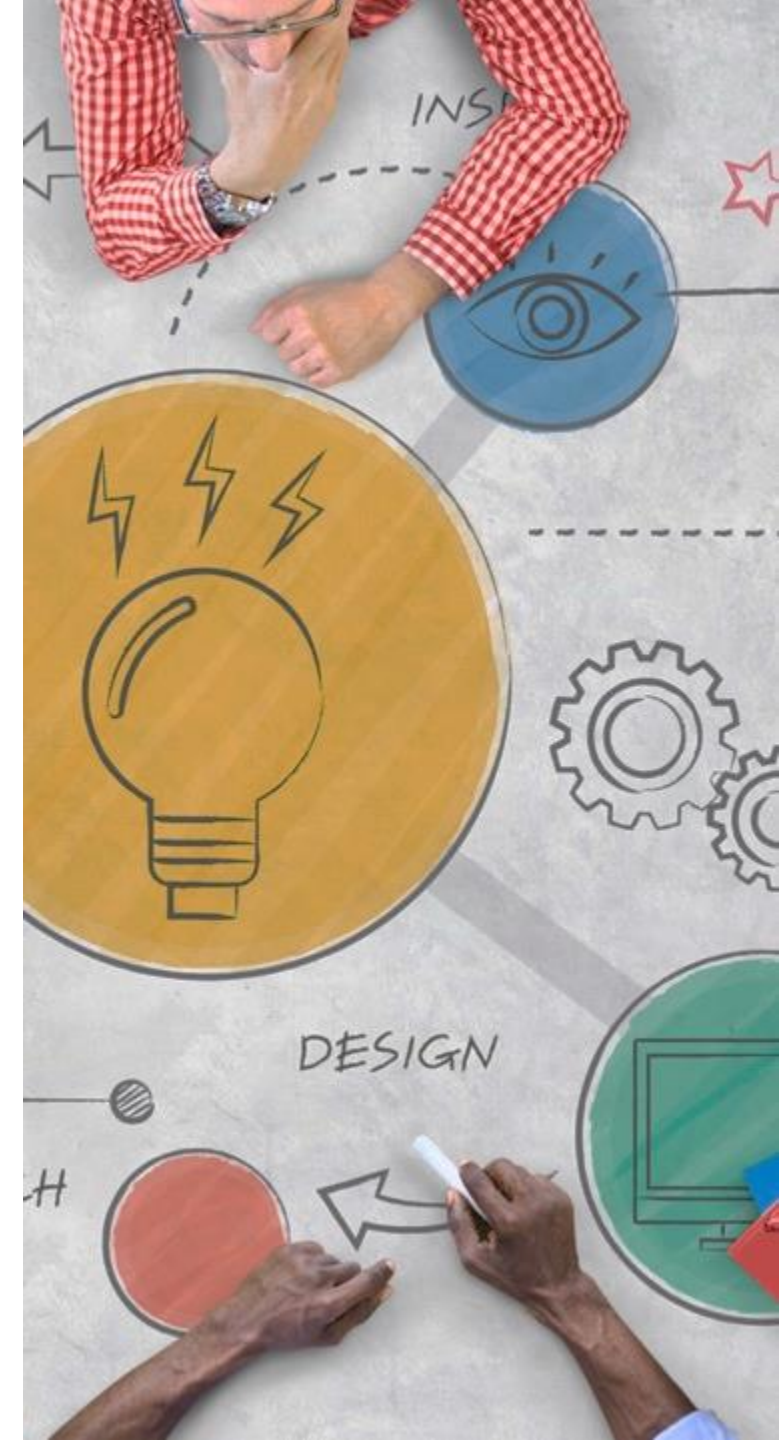
Alberta continues to be at a crossroads brought by a pandemic that has changed public life and re-shaped our economy. This is especially true in the arts sector which continues to experience a decline in engagement with events and activities. This work was developed for this sector exclusively. It builds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

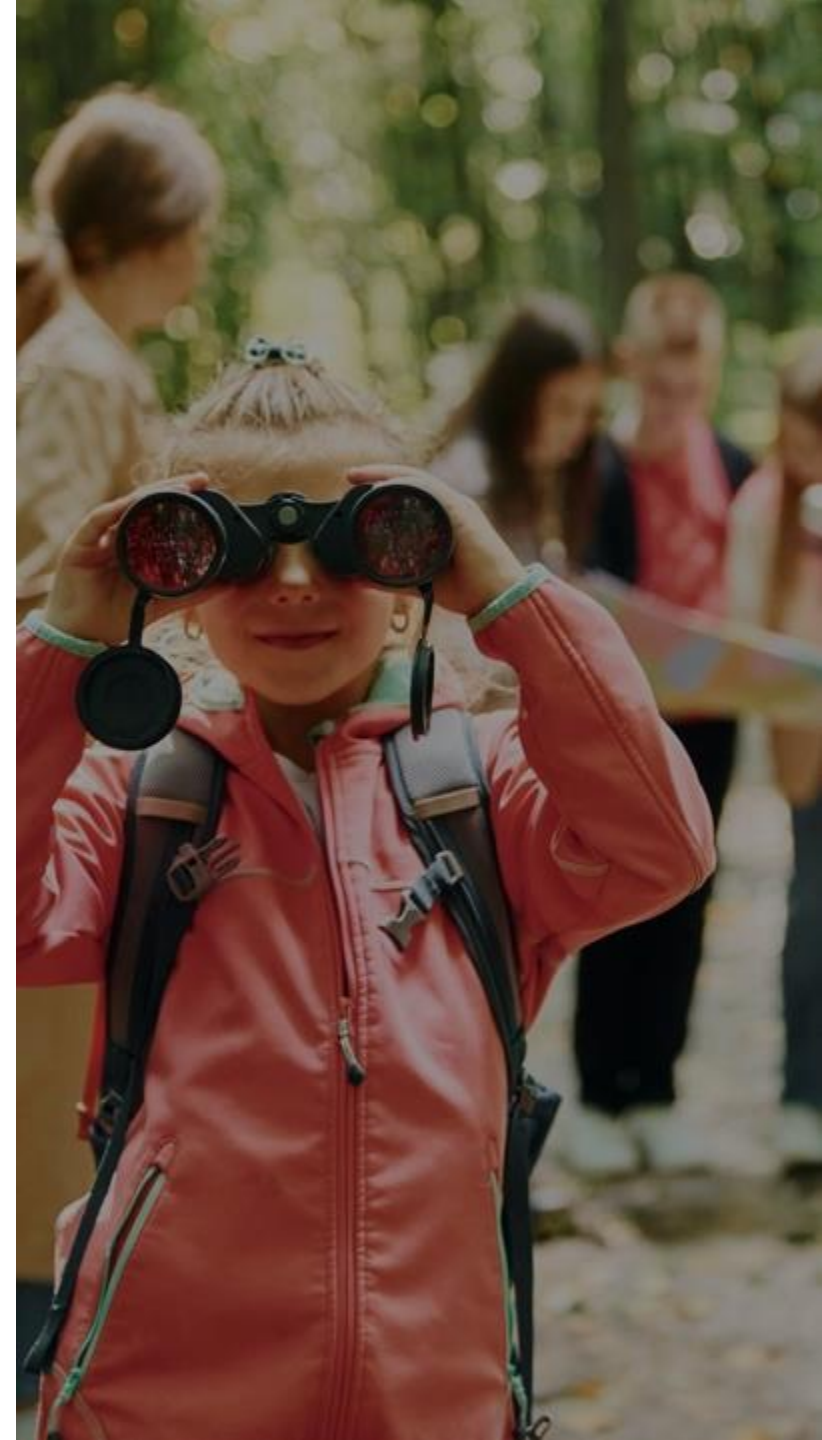
A total of n=1,160 surveys were collected across the following regions:

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

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**. Calgarians also have an added interest for **transformative experiences**.

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 Calgary this fall?

**In short, not a lot!** 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 Calgarians through the door. The primary reason(s) adult Calgarians to participate in arts activities are overwhelmingly related to fun, social, and entertainment. In addition, there is a greater emphasis (just slightly) on wanting unique and different experiences in this market. 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.** Cost of living remains a top issue both nationally and provincially. On a local level, we learned that 43% of Calgarians feel like they are 'just getting by' financially or 'falling behind.' The good news is Calgarians have a propensity to spend and are not necessarily looking at cost alone. Instead, they are considering the experiences or activities and then deciding what fits into their somewhat flexible budget. It is a strong reminder that organizations have to show they are worthy of Calgarians spending what time and money they have on them 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 impulse decisions. Most are decided more than one week before an activity and deciding is a shared task. While some may lead individually in doing the research, the vast majority share the final decision with other people in their household. Because the final decision to commit is shared, organizations will have to keep showing the shared benefits too (i.e., fun together, enjoyment together, something unique together, learn together, etc.)
- 4 Cost is not the only barrier - address the hassle factor.** Not surprisingly, cost is the most frequently mentioned reason for not engaging, but it is rarely (less than 1%) mentioned on its own. Although it is part of the equation for many, the 'hassle' factor is a prominent consideration as well. The importance of making it easy and/or showing how easy it is to engage has not diminished and making them comfortable if they are uncertain also remains.

# Engaging in Arts Education

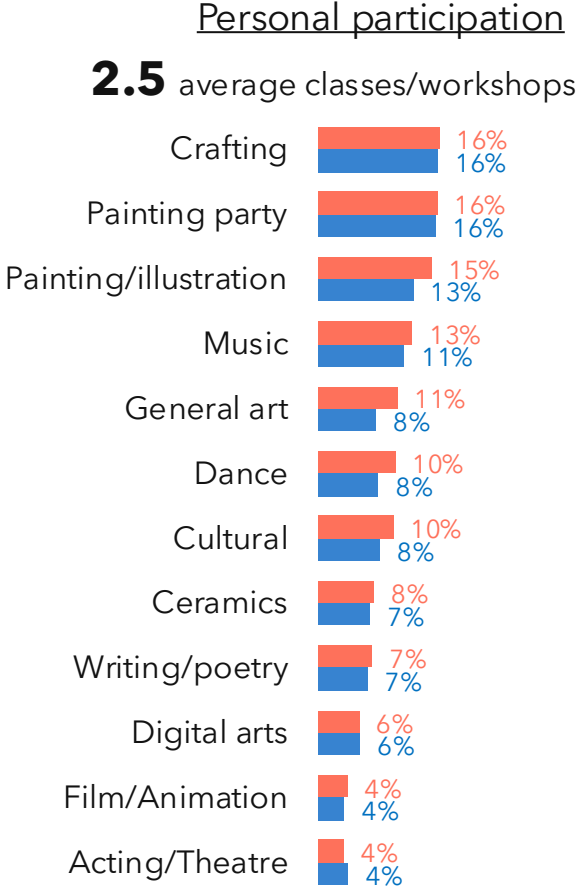




# Children participate in more than double the number of classes/workshops than adults

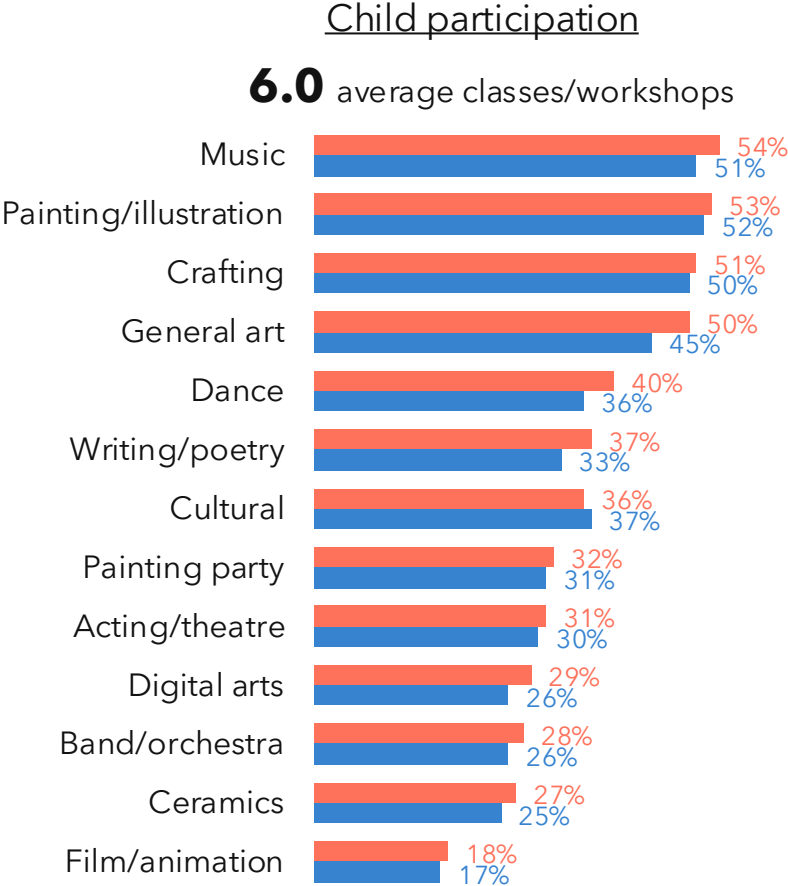
Calgarians are participating in classes and workshops at similar rates as the rest of the province.

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



**48%** have participated in at least one activity

**46%** Albertans



**81%** have participated in at least one activity

**80%** Albertans

■ Calgarians ■ Albertans

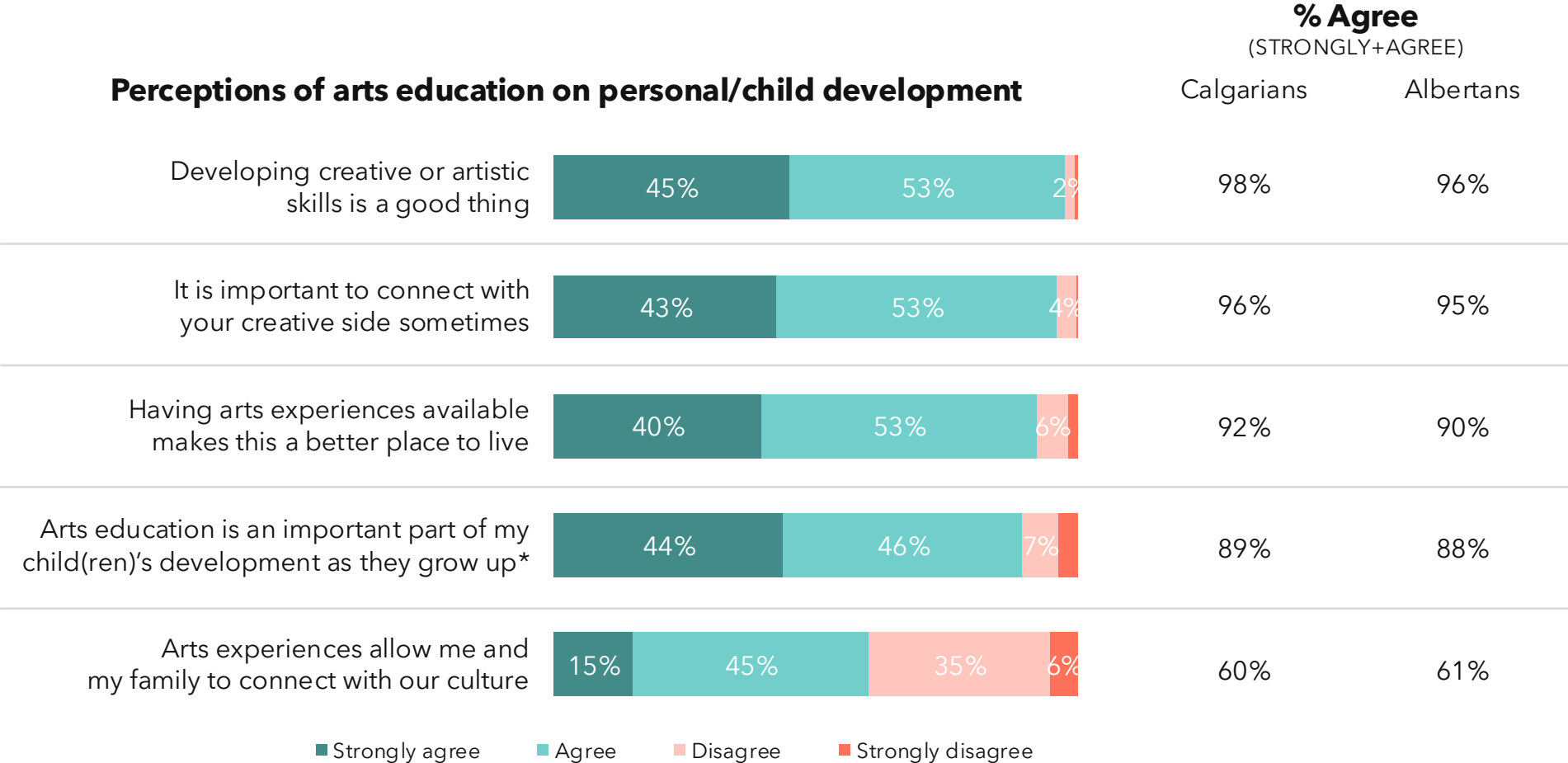
■ Calgarian (Children) ■ Albertan (Children)

Q11. Which of the following have you personally done in the last two years? Base: Calgarian 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 - Calgarian respondents (n=103); Albertan respondents (n=303)



# There are strong benefits to engaging with arts education

Calgarians are very similar to the rest of Albertans in many of their attitudes towards arts education, although they 'strongly agree' more than the rest of Albertans when it comes to being important to connect with creativity, or arts education being important part of child development.

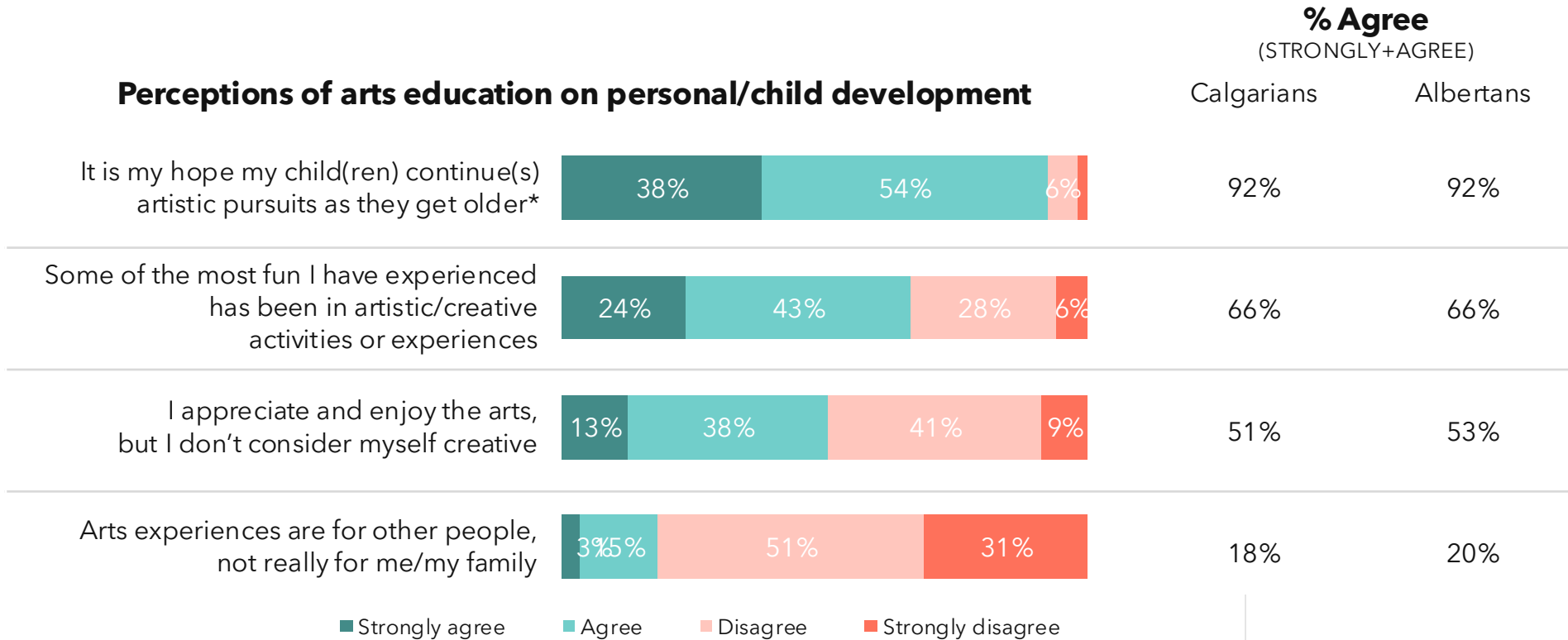


Base: Calgarian respondents (n=400); \*Have children under 18 in household (n=103)  
Q15. Below are a few statements about arts education; please review them and tell us if you agree or disagree with each one.



# And Calgarians also see relevance in artistic experiences

Similar to the rest of the province, a larger proportion (71%) of younger Calgarians (ages 18-34) agree on the element of fun they have experienced while being artistic or creative. That said, creativity *can* be intimidating and the idea of not considering themselves creative could be a limiting factor to participation in activities.



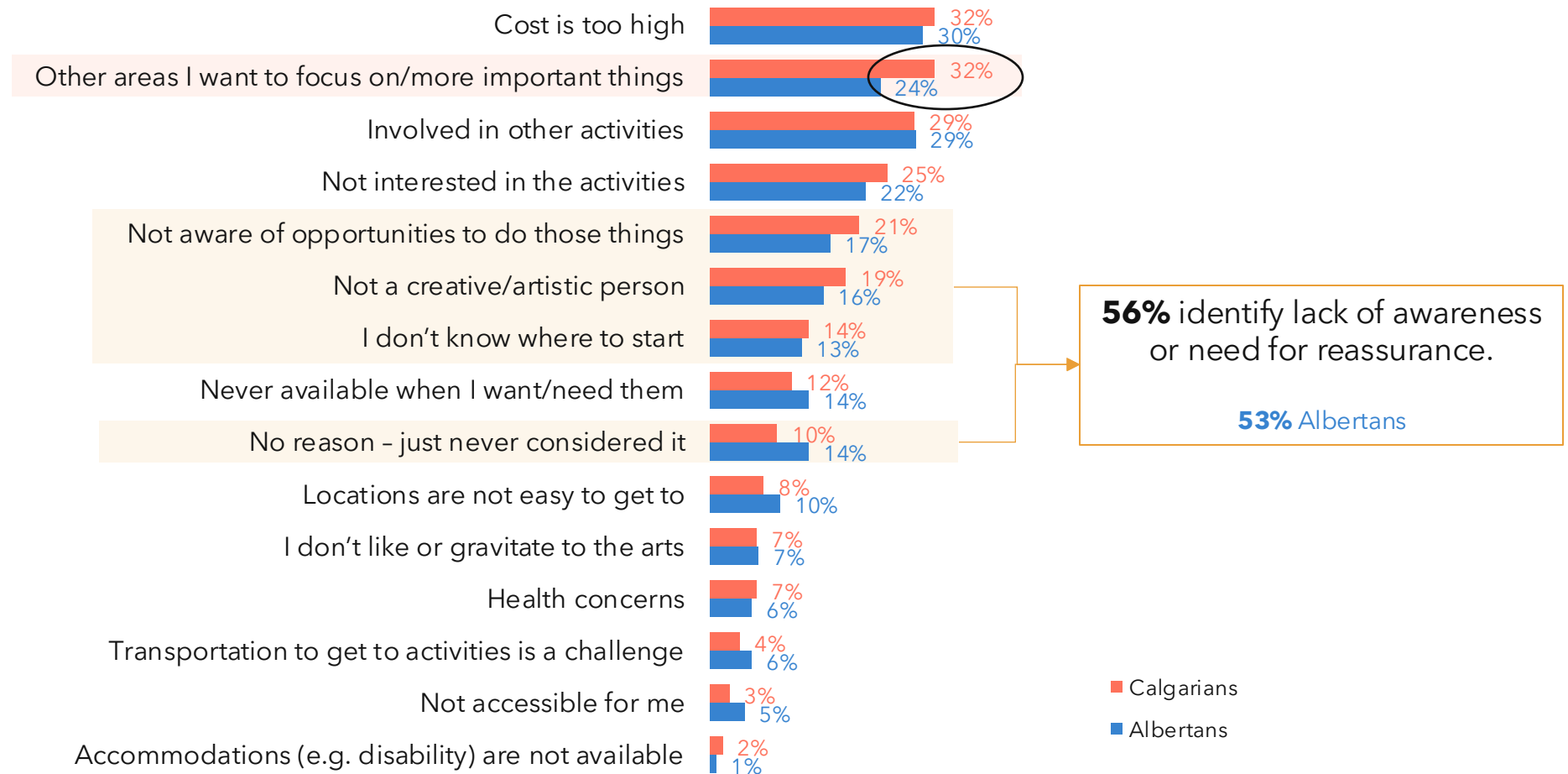
Note: As a negative statement, reversed, this translates to 82% agree that arts experiences are relevant to them



# Many adults are simply unaware or complacent, which presents a significant opportunity

The opportunity is greater in city centres (Calgary and Edmonton) where there is a slightly higher propensity to be unaware or options or not consider themselves creative. However, in this market time is a barrier as Calgarians have a higher propensity to have other areas they want to focus on.

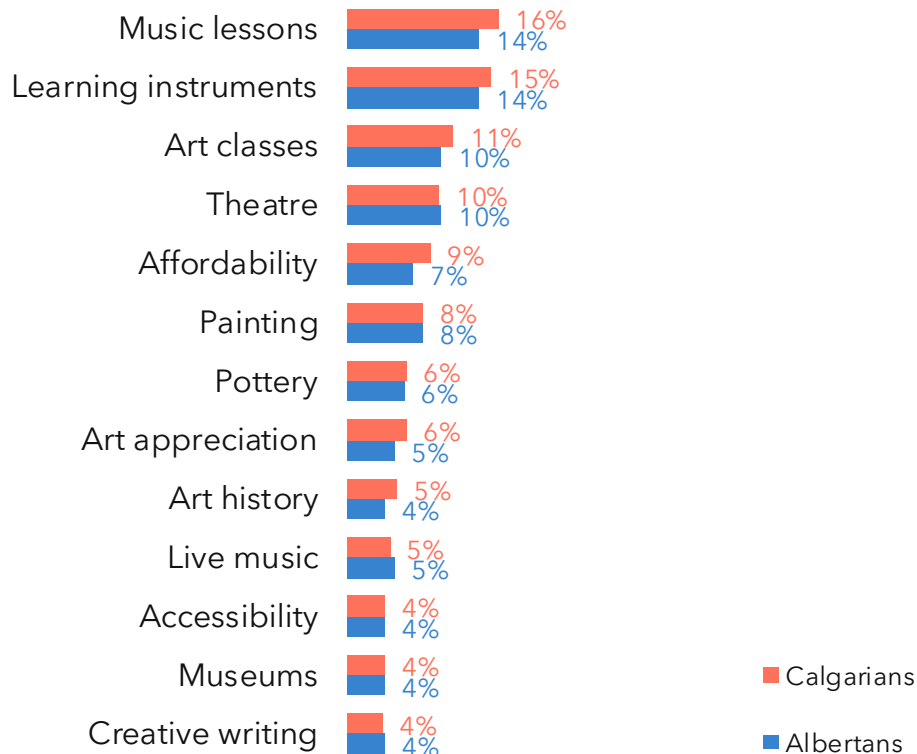
## Reasons for NOT participating in arts education activities



# What art experiences do Calgarians want available?

Calgarians 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: Calgarian 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.

*I would love affordable classes to play an instrument.*

*Music experiences and learning beyond what is taught in schools, also learning a specific instrument in depth. Drawing, painting, sculpting, crafting classes for kids should be more available, and more affordable. I would love to have our child take a fun/casual drama/theatre class.*

*Opportunities to try out musical instruments with guidance / lessons without having to commit a lot of cash up front.*

*Courses in Art/Music history and music/instrument lessons, would be useful.*

*More performances available from home. Like broadcasting Broadway so I can watch at home.*

*Open jams for acoustic guitar, ukulele. there used to be one at the library, but it shut down during covid and never started again.*

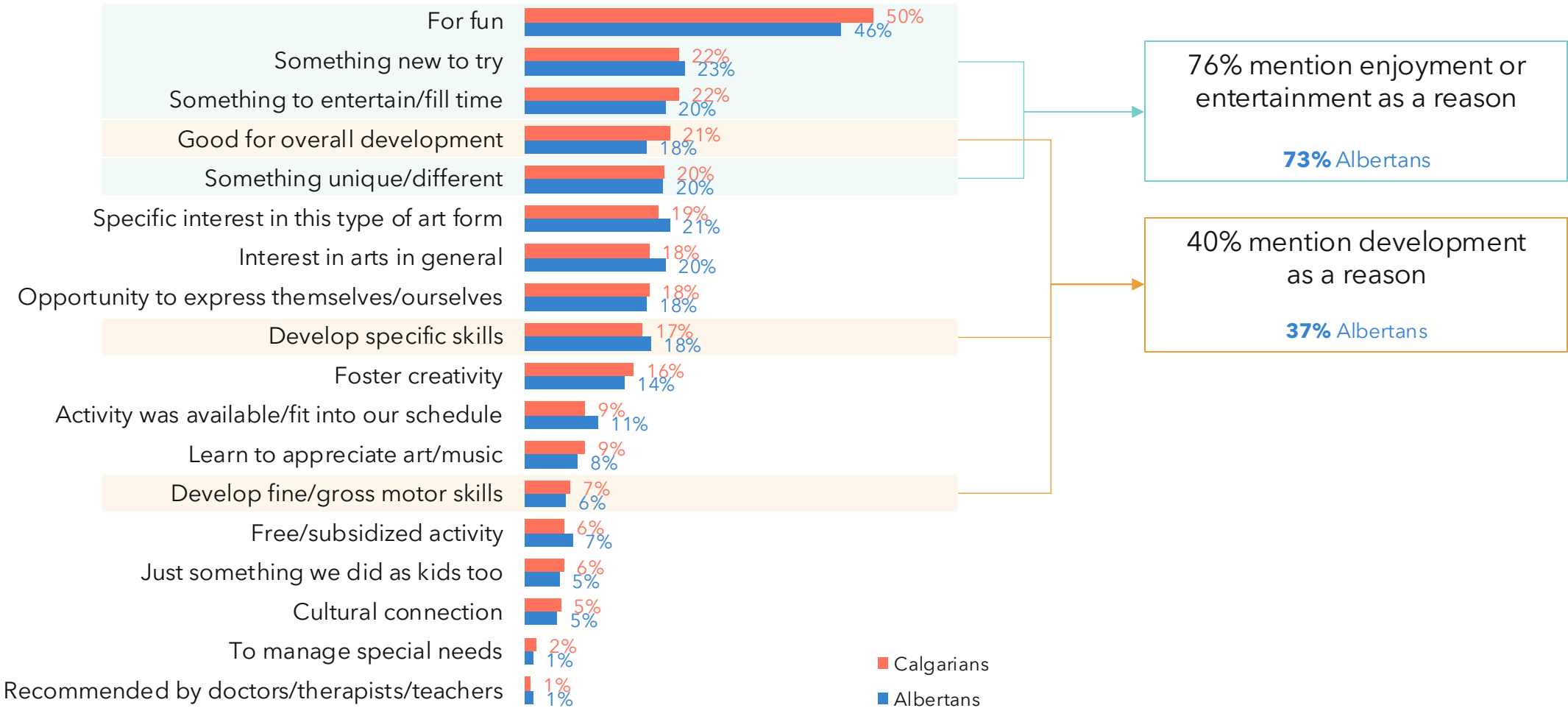
*I wish all Artistic experiences, classes and instruction were more affordable. Both my Children are interested in Year-Round Musical Theatre and the program is too expensive for me to register two children.*

*Mentoring programs wherein local artists and musicians are paired up with adults 50+ who have always wanted to pursue art or music or who want to pick it up again.*



# Similar to all Albertans, the idea of having fun and being entertained is of superior importance for adults compared to development

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



Base: Participated (personally or children) in arts related activities or experiences in the past two years - Calgarian respondents (n=229); 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 Calgarians get out of attending arts experiences?

For the most part, it's the combination of benefits and personal development that makes art experiences different than other activities. Calgarians mention unique and different experiences slightly more often.

## Personal outcomes from experiencing/participating in arts

Mentions of 5% or more



Base: Calgarian 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.)

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

Emotionally charged experience.

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

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

Being able to express my creative side.

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).

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

Memories with my kids.

Theater gives me a chance to contemplate and become engrossed in a story with no distractions.

Calgarian respondent open-ends

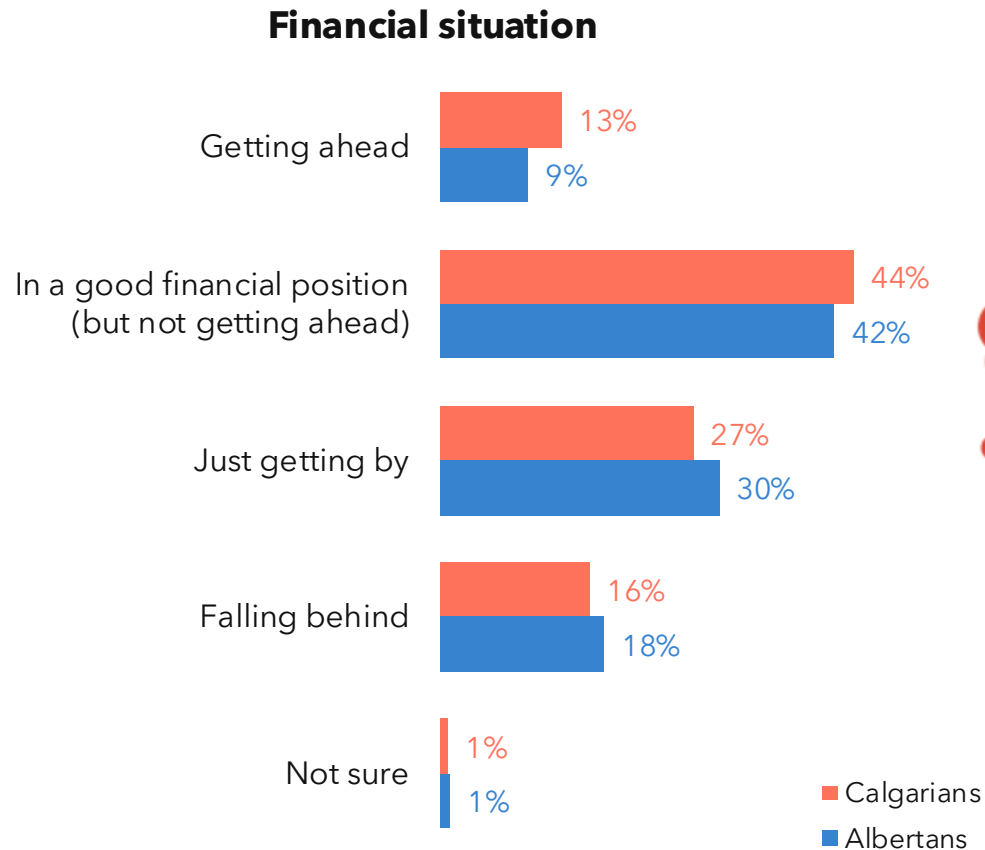
A man with a beard and a blue button-down shirt is smiling and holding a smartphone. He is standing at a retail counter. To his left, a woman with dark hair is smiling and looking at a computer monitor. To his right, a cashier wearing a red cap and a red uniform is partially visible, holding a payment terminal. The background shows a retail store with shelves and other customers.

# Understanding Spending and Affordability



# Financial situations can be described as stable or struggling

A higher proportion of Calgarians feel as though they are getting ahead but this proportion is still small. More than two-in-five Calgarians feel 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.



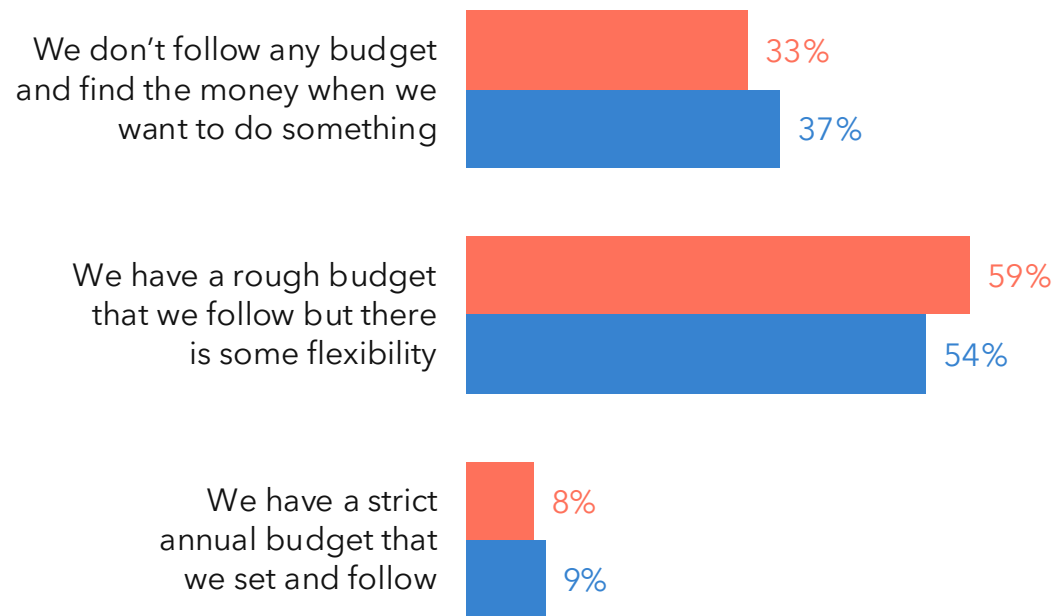
Habits among Calgarians who are getting by or falling behind are similar across the province. They tend to have a **strict budget** and have a specific amount they want to spend on activities and are more thoughtful when selecting what fits into the budget. Show them the value. In addition, they seek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



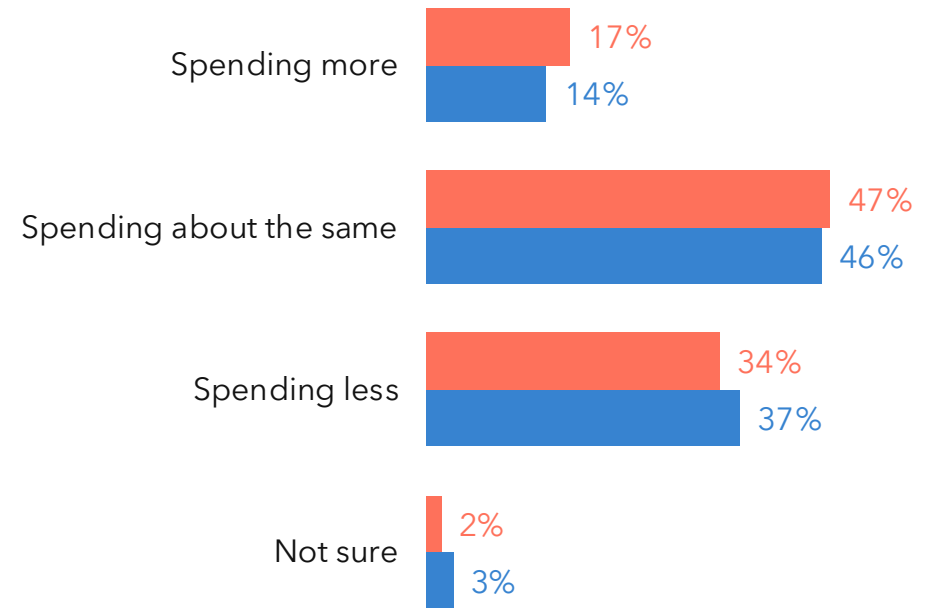
# There is flexibility with how Calgarians budget

Compared to the rest of Alberta, more Calgarians have a rough budget which tells us this is not just about spending, but rather how arts experiences fit into their budget. In fact, just under two thirds (64%) are spending the same or more on discretionary activities than last year. This tells us Calgarians **are** spending, but they are making very informed and sensible decisions on which activities they will engage in by looking at the value. As an arts organization, it is critical to show Calgarians your offerings are 'worth it'.

## Budget for discretionary experiences and activities



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



■ Calgarians ■ Albertans

Base: Calgarian 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?

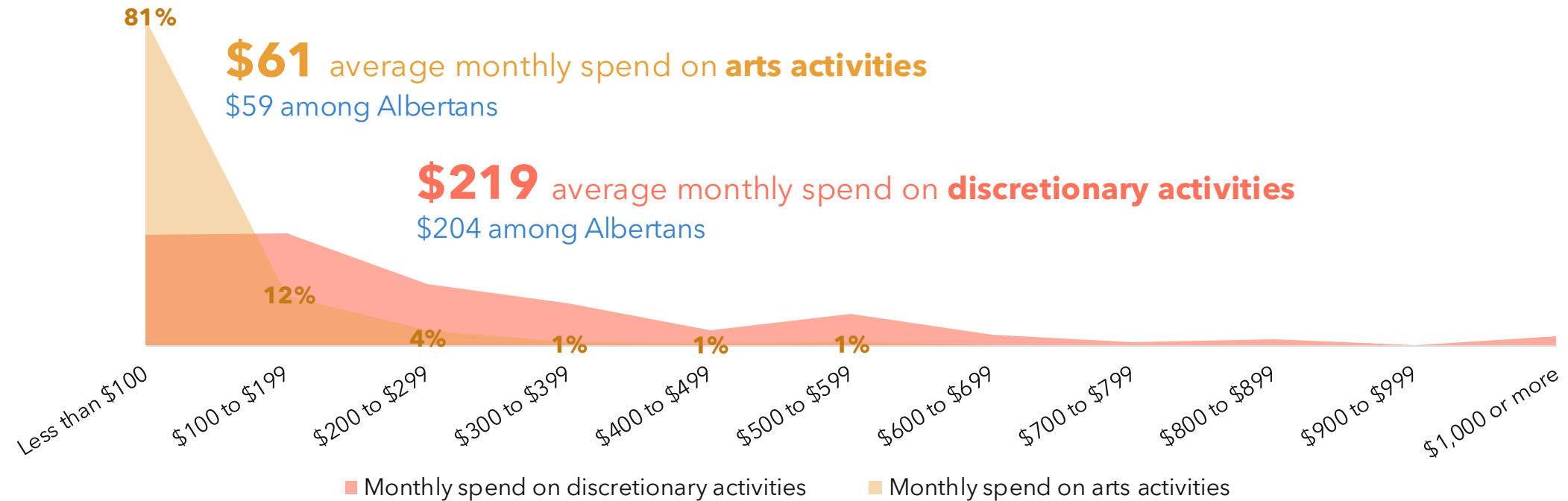
Q18. Thinking about your current situation compared to this time last year and spending on discretionary activities and experiences, are you...?



# Calgarians are spending slightly more on all activities

Although spend is higher in Calgary, the proportion spent on arts activities compared to all activities is similar across the province. Organizations are competing for share of wallet.

## How much do you spend on activities?



**Discretionary activities** defined as: Any discretionary 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 - Calgary (n=318) - 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?

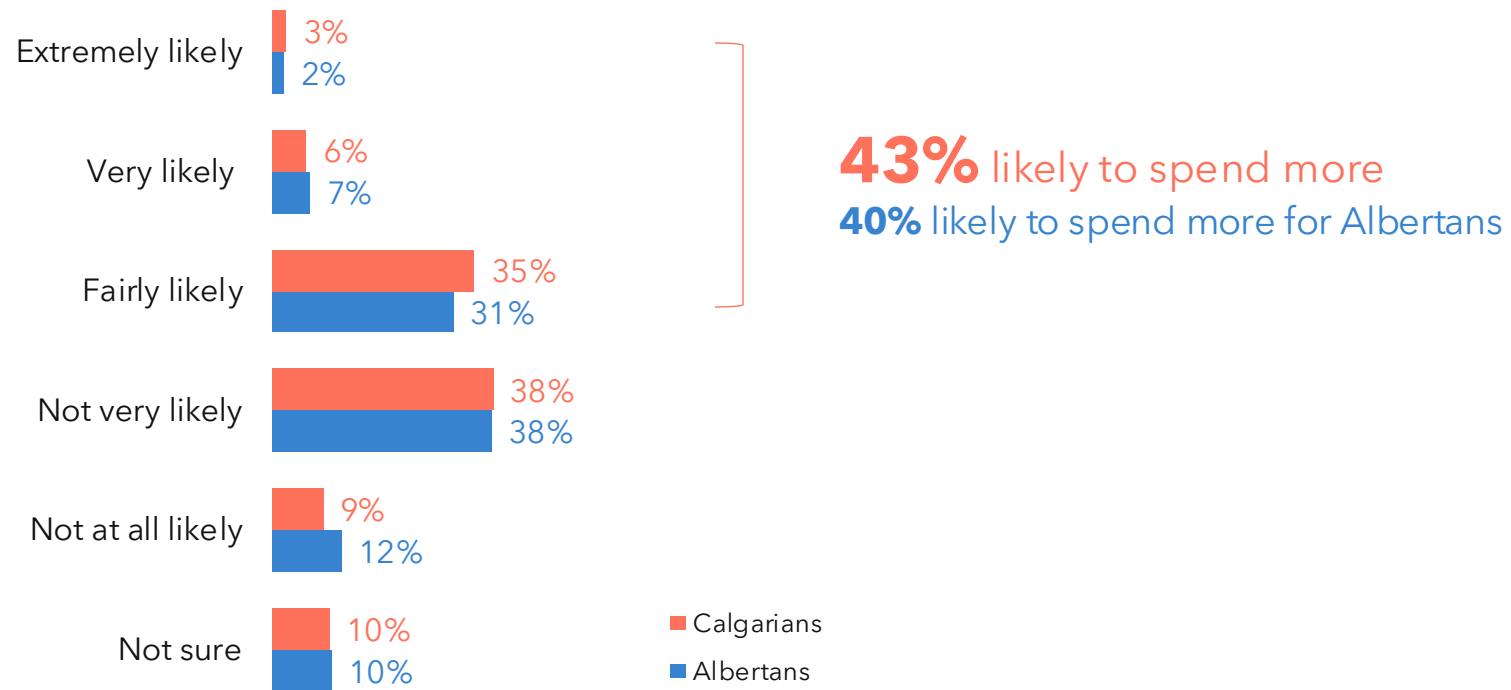
Q19. When you think about all the discretionary experiences and activities and experiences you spend on, about what percent is for arts and culture related activities/experiences?



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

While likelihood to increase spend is slightly higher in this market, Calgarians who are very or extremely likely to spend more is small - which is similar across the province. 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





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

Ease and flexibility (which are fundamental for any activity provincially) have slightly greater importance in Calgary. These elements are critical for the early stages of consideration. In addition, Calgarians put slightly more emphasis on perks and unique experiences.

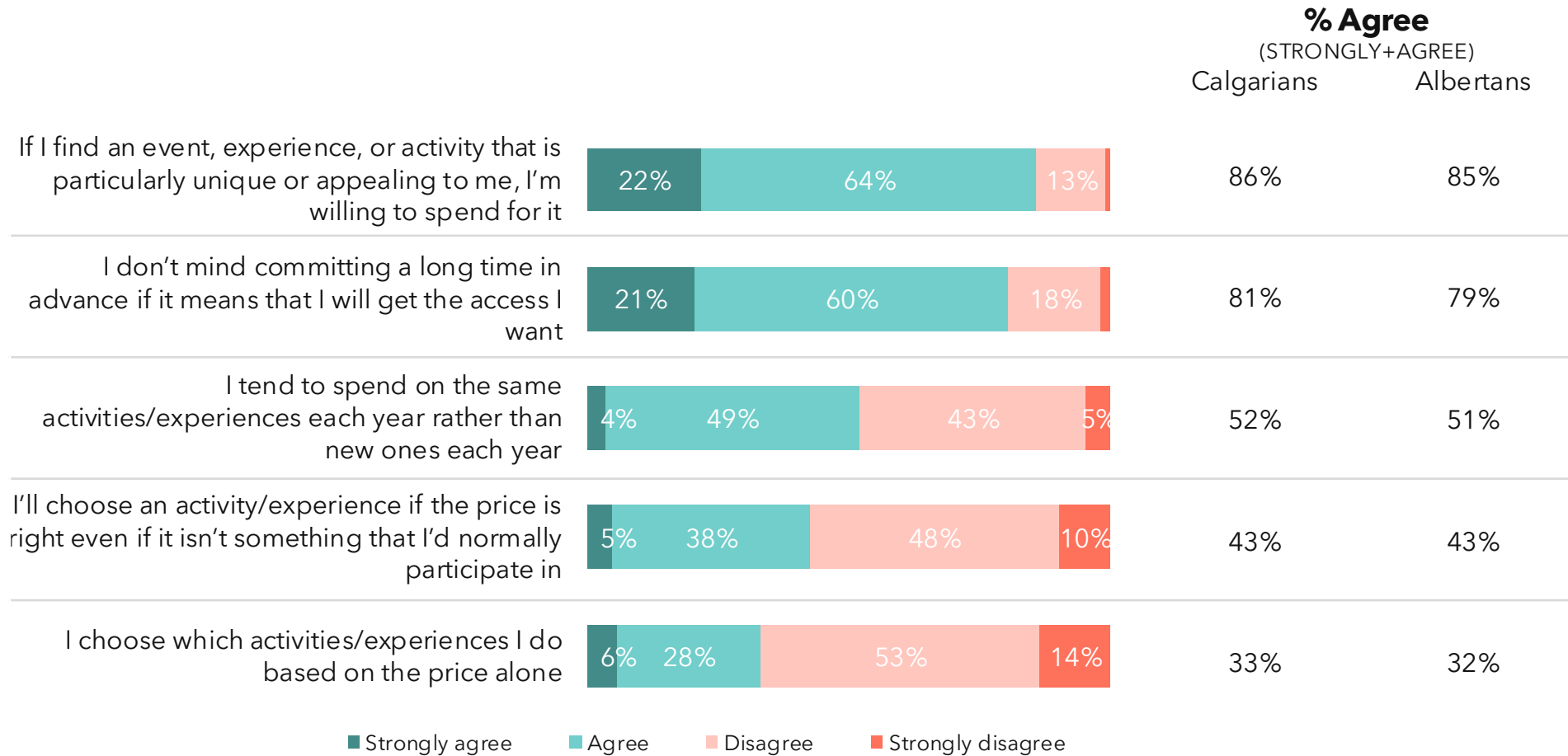
Messages to increase consideration to spend more on arts experiences/activities	Calgarians	Albertans
Activities/experiences that are easy to enjoy and do	54%	50%
Activities/experiences that help me learn something new	48%	47%
Something that I can do with my friends/social group	46%	44%
The promise of experience that will make me feel something	40%	41%
Activities/experiences where 'extras' like parking or refreshments are included	37%	34%
Something that also supports a cause in the community	32%	36%
Activities/experiences that are interactive	28%	27%
Activities/experiences that are not available anywhere else	28%	24%
Activities/experiences for your whole family or household	26%	27%
Activities/experiences where 'perks' are included	19%	16%
Something I can do over and over	18%	20%
Packages that cost more but deliver savings for more individual experiences	9%	10%
There is nothing organizations could do to get me to spend more	10%	12%

Base: Calgarian respondents (n=4-00); 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 Calgarians are budget conscious and hesitant, but they are willing to spend if an activity stands out or feels right for them – price is rarely the sole decision criteria. 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.



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

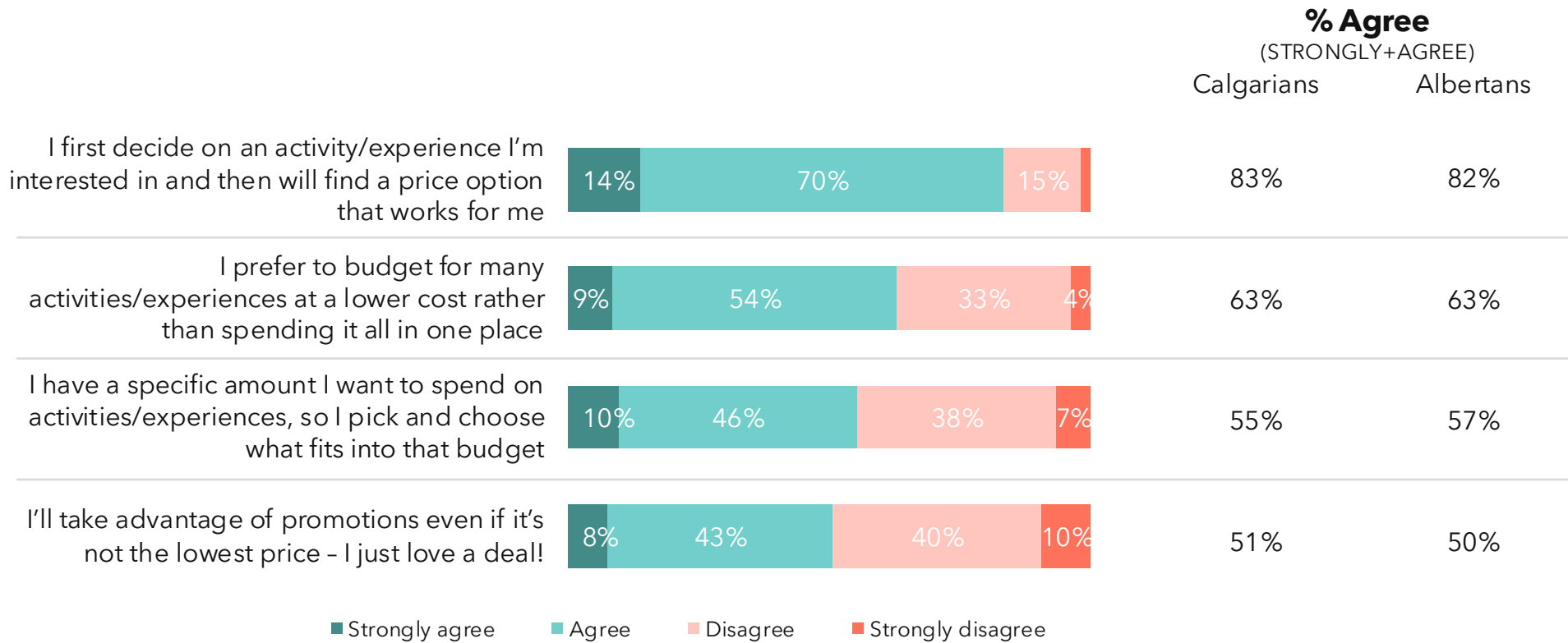
Q20. Below are a few things people might say about how they decide which activities and experiences to spend money on. Please tell us if you agree or disagree with each one.





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

Similar to Albertans, Calgarians see value in an activity, they want to find a price option that fits within what they are able to spend. This is not a matter of first assessing if they can spend, but rather, the opposite. Similarly, with a tighter wallet, there is appetite for a variety of experiences rather than committing a larger share of wallet to one experience. Because of this, considering how to offer affordable options will be key to fostering greater engagement.



Base: Calgarian 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.

A man and a woman are sitting on a light-colored sofa in a living room. The man, who has a beard and is wearing a blue button-down shirt over a green t-shirt and blue jeans, is holding a green tablet and looking at it. The woman, who has short dark hair and is wearing a green sleeveless top and dark jeans, is leaning in and looking at the tablet with him. The room is warmly lit, with a lamp on a side table behind them and a window with curtains in the background. The overall atmosphere is cozy and collaborative.

# Decision Making and Last-Minute Activities

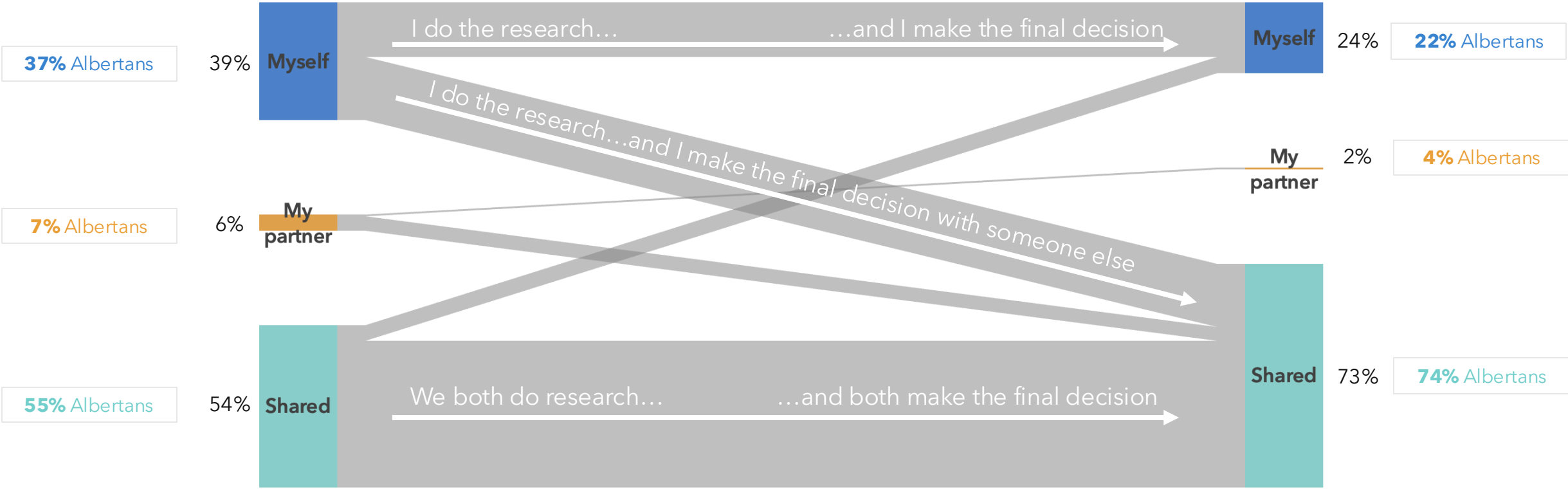


# While individuals are often doing the legwork, the final decision on engagement is usually shared

Sharing this task is true across the province and tells us marketing messages have to resonate with a wider audience but especially those who are most likely doing the research on their own (women) and particularly in family households.

Who **does research** on which experiences/ activities to do?

Who **makes the final decision** on which experiences/ activities to do?



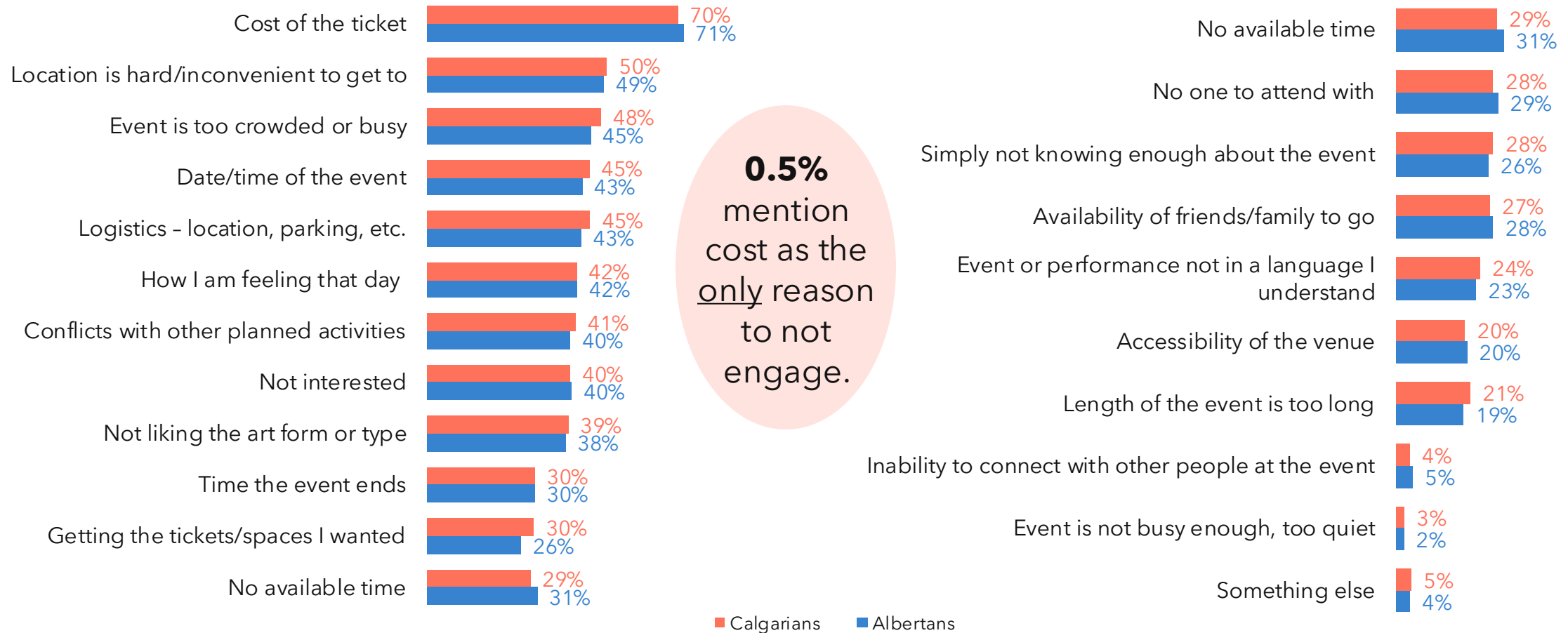
Base: Respondents who live with at least one other person - Calgary (n=328); Alberta (n=963)  
Q25. In your case, who typically does the research and comes up with ideas on what activities and experiences you might do?  
Q26. And how about the final decision? Who typically makes the final decision on what activities or experiences to do?



# Cost is a major consideration, but not the only barrier

Not surprisingly, cost plays a critical role. But for Calgarians, as well as Albertans, there are other barriers to address. The overall hassle factor of convenience, crowded, and logistics is also a very prominent barrier to consider addressing.

## Barriers to participation



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

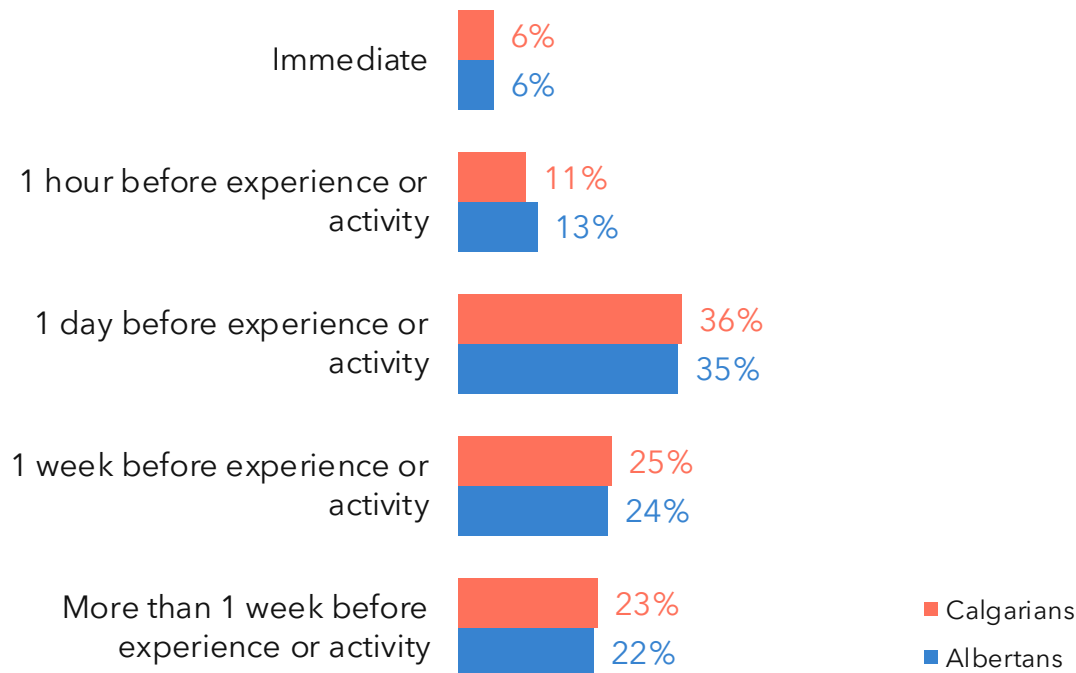
Q31. Thinking about any decision, short or long term, that you make about attending events or participating in arts related activities/experiences, what are those things that are most likely to prevent you from going? This could be anything that stops you from making that final decision to attend or purchase tickets. Select all that apply.



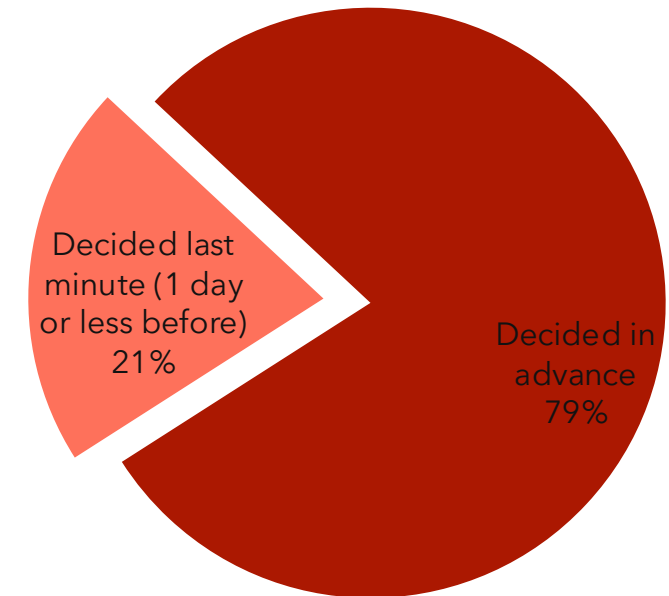
# Calgarians are mostly planners with few committing to a 'last-minute' experience

Calgarians' 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: Calgarian 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?

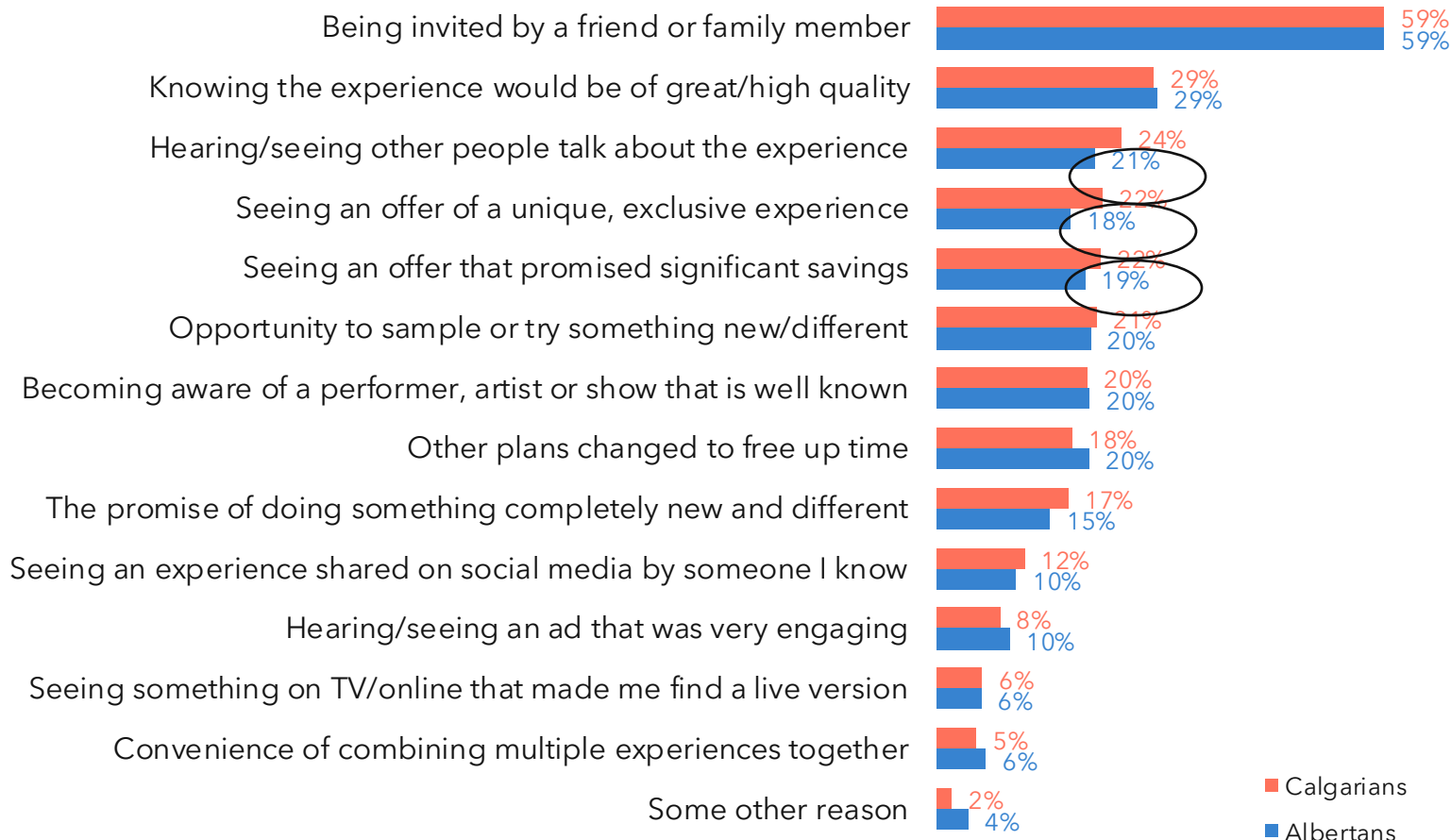


# Awareness and opportunity will be THE factors inspiring impulse engagement in Calgary

Calgarians are also slightly more motivated by factors such as uniqueness, significant savings, and hearing/seeing other people talk about the experience.

## Messages to inspire last-minute experiences/activities

Top 3 selections



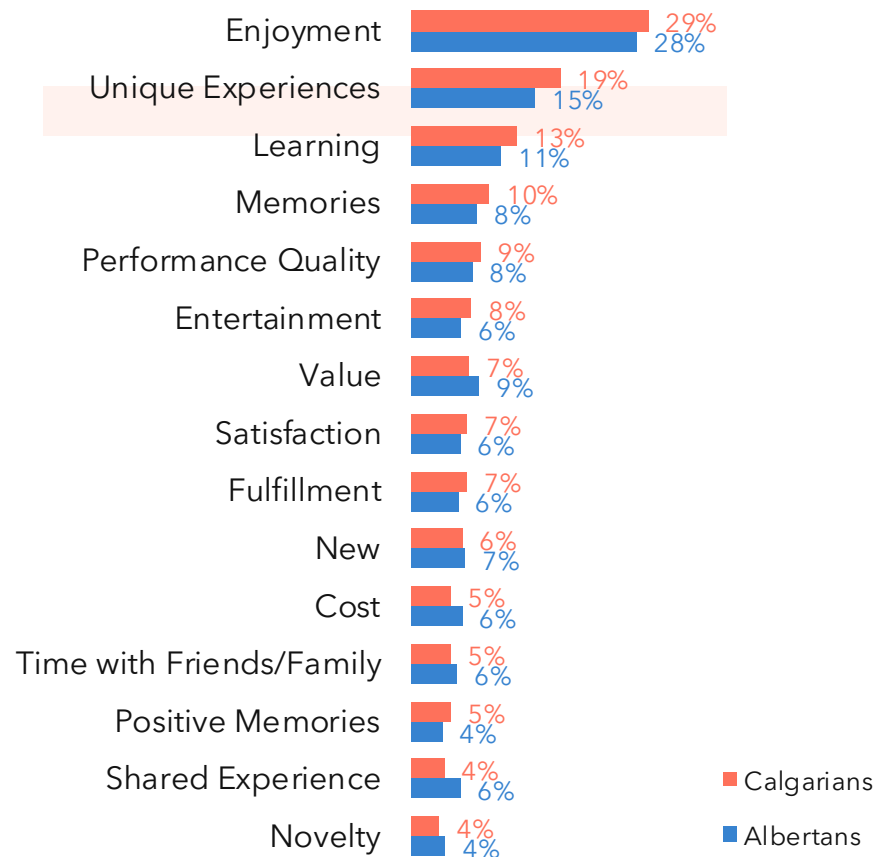
Base: Calgarian respondents (n=400); Albertan respondents (n=1,160)  
 Q30. What is most likely to inspire you to do something at the last minute? Select up to three.

# What makes art experiences or activities worth it?

It will be important to tap into emotions to draw Calgarians in and leave a lasting impression. While sentiment is similar across Albertans, Calgarians again place slightly greater value on unique experiences.

## Defining what makes an arts experience 'worth it'

Mentions of 4% or more - Calgary



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

Money wise and good experience for the event .

Interactive and I am learning from it.

Great for mental health (a change in scenery).

Connection with others.

An enjoyable performance that the cast and crew put a good effort in to making it.

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.

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

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

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).

# Respondent Profile

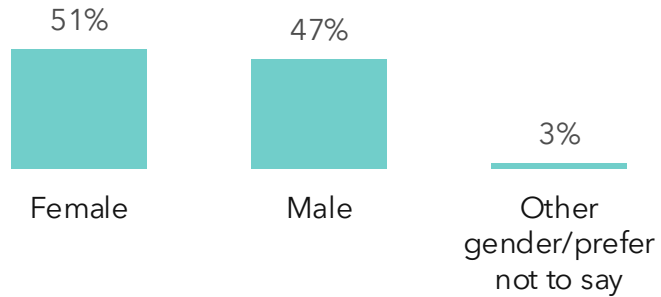




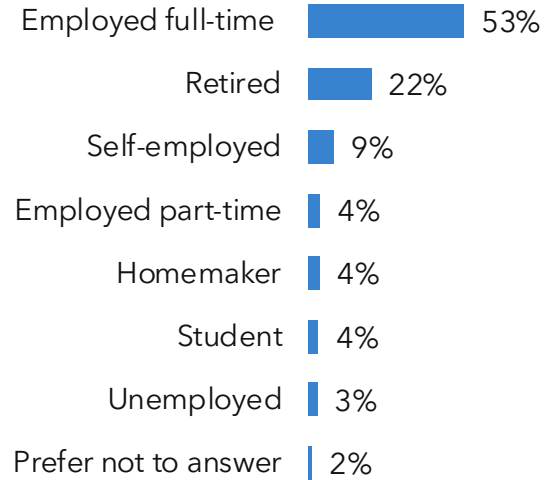
# Respondent Profile: Who We Heard From



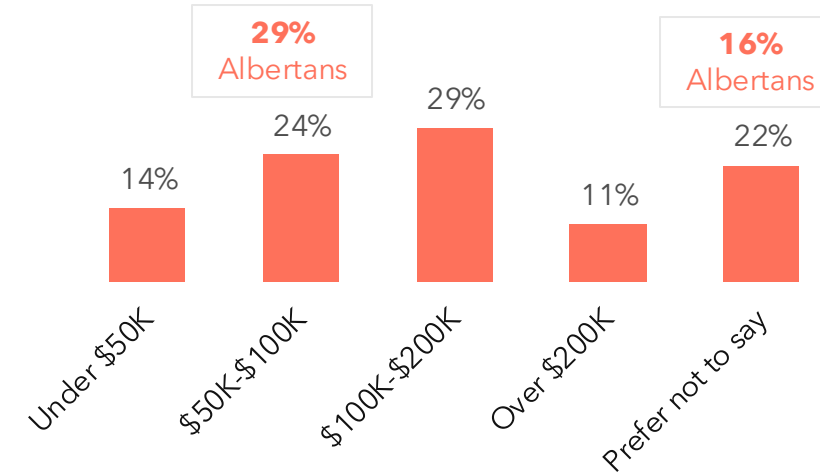
## Gender



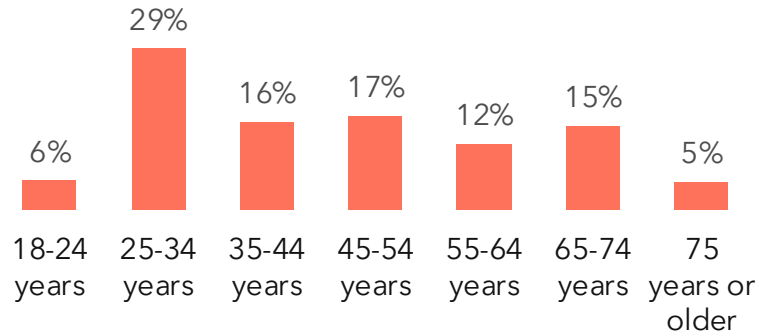
## Employment



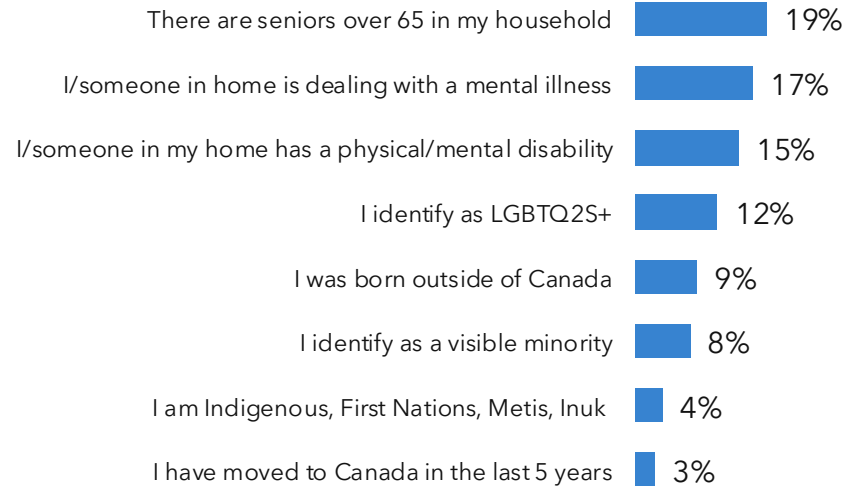
## HH Income



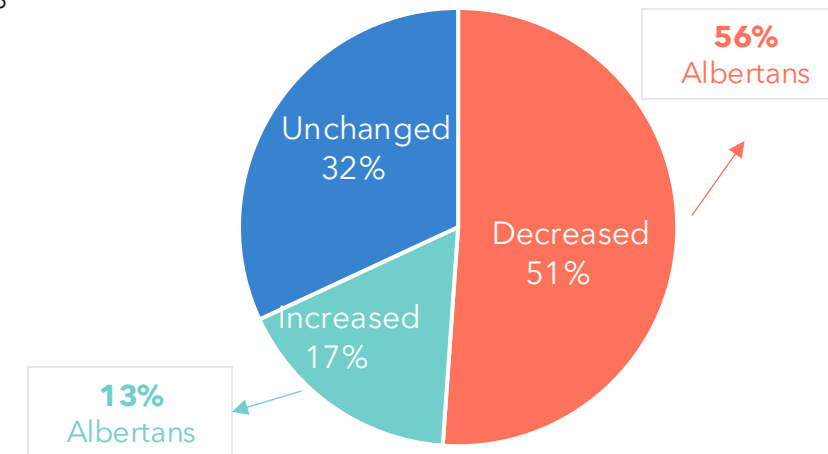
## Age



## Diversity/Identity



## Income Change - Past 3 Years



Base: Calgary respondents (n=400)

# Understanding people.

It's what we do.

**Stone —  
Olafson**

**Questions or Comments?**

Please contact: [mathew@stone-olafson.com](mailto:mathew@stone-olafson.com)

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