Stone Olafson

Spotlight on Arts Audiences

Wave 3: Summer/Fall 2024

Regional Alberta results

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Thank you to our generous partners

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

We thank them for their generous support.

A collaborative and evolving resource:

Purpose & Objectives:

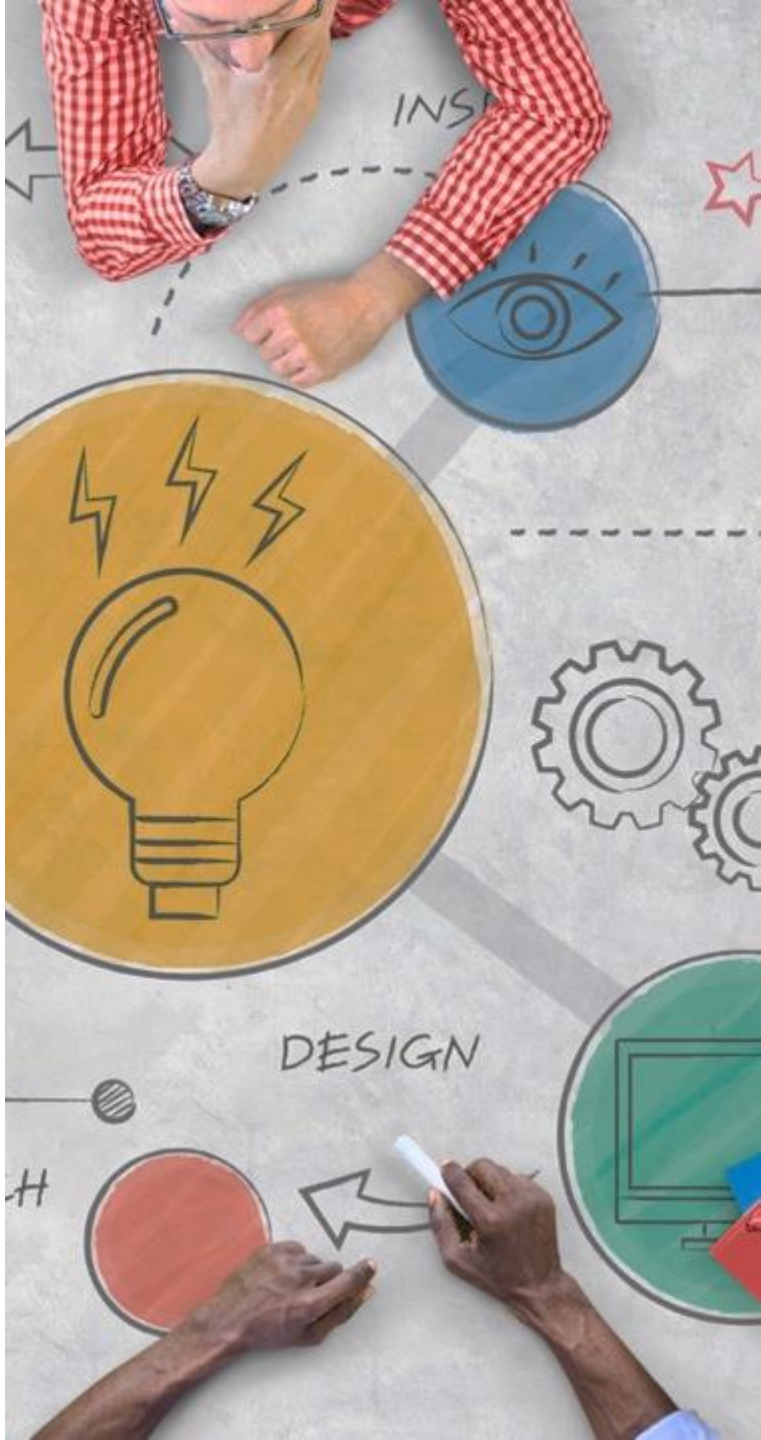
Alberta continues to be at a crossroads brought by a pandemic that has changed public life and re-shaped our economy. This is especially true in the arts sector which continues to experience a decline in engagement with events and activities. This work was developed for this sector exclusively. It builds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

Regional AB

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 Northern, Central, and Southern Alberta regions only. Results are shown alongside total results to provide a directional comparison to other areas of the province.

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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**.

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 outside of Edmonton and Calgary this fall?

Overall, audiences in these regions are very similar those in city centres, but small differences between regional areas are noted. Residents in Northern Alberta have softer viewpoints when evaluating the benefits of arts education. In addition, messages of ease and flexibility have slightly greater importance for Northern audiences while Central and Southern audiences place slightly greater importance on experiences that make them feel something and shareable experiences. Still, the themes already identified across the province are very much present and applicable. A summary of these 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 Albertans through the door. The primary reasons adults participate in arts activities are overwhelmingly related to fun, social interaction, and entertainment. In addition, there is a slightly greater emphasis on wanting unique and different experiences in this market. Communication efforts should focus on entertainment and uniqueness factors first, with skill development simply coming 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 48% of Albertans outside of major city centres feel like they are 'just getting by' financially or 'falling behind'—this is higher in Central and Southern Alberta compared to Northern Alberta. The good news is that Albertans 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 Albertans spending the 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 participants comfortable if they are uncertain also remains important.

Engaging in Arts Education

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

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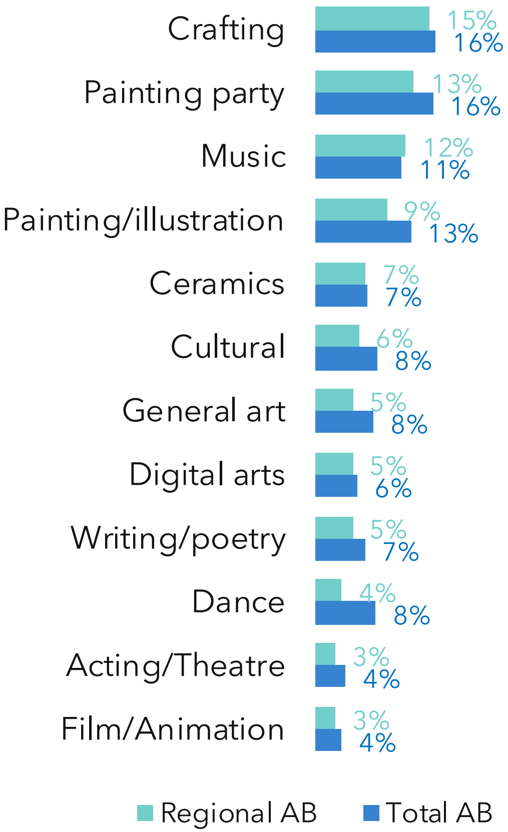
Class/workshop participation - % participated in the past two years

Personal participation

2.0 average classes/workshops

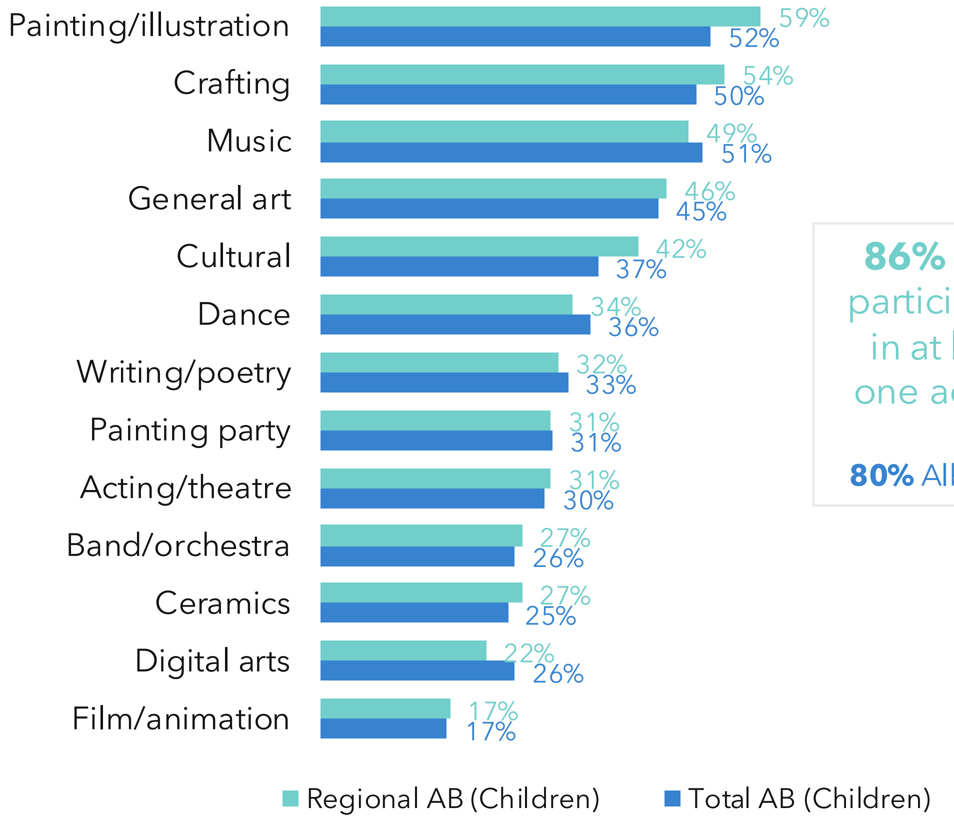


43% have participated in at least one activity

46% Albertans

Child participation

5.8 average classes/workshops



86% have participated in at least one activity

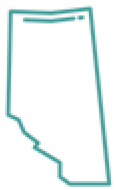
80% Albertans

Q11. Which of the following have you personally done in the last two years? Base: Regional AB (n=360); 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 – Regional AB respondents (n=104); Total AB respondents (n=303)

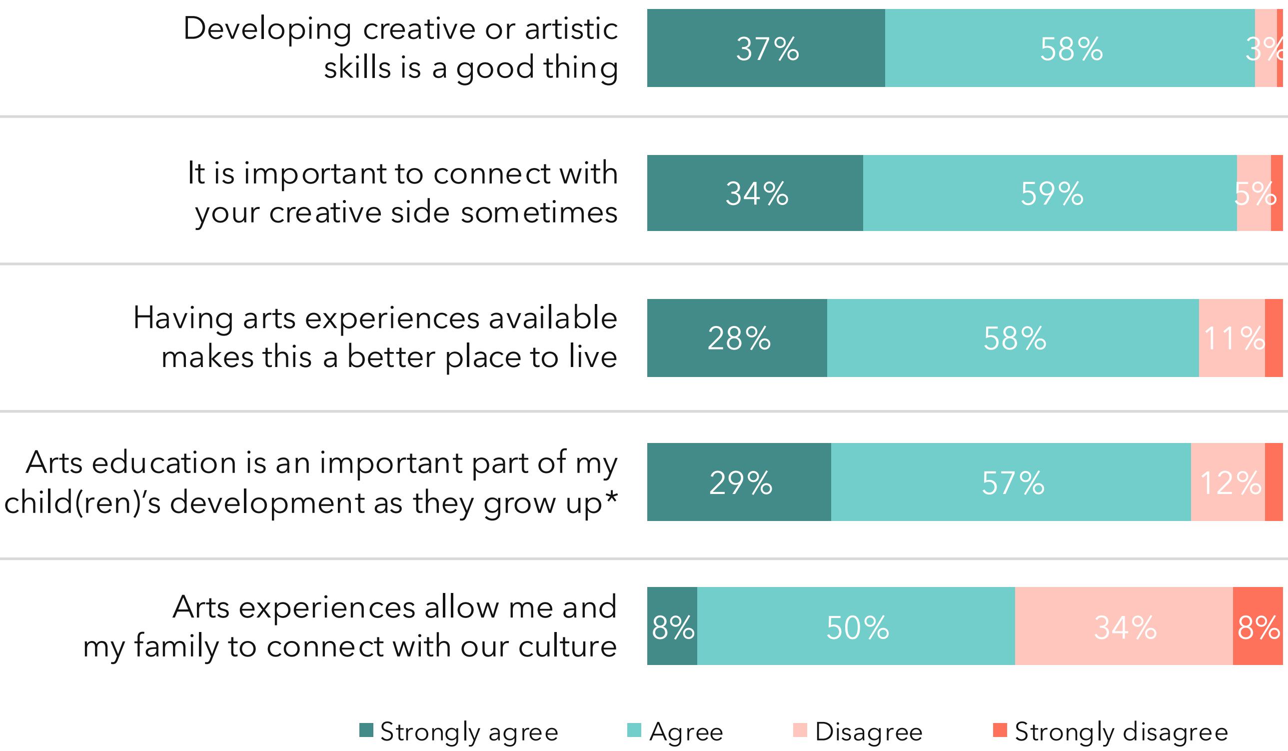
Stone — Olafson

There are strong benefits to engaging with arts education.

Central and Southern audiences recognize the benefits slightly more than Northern audiences who tend to have softer proportions who 'strongly agree' across many attitudes.



Perceptions of arts education on personal/child development



% Agree
(STRONGLY+AGREE)

	Regional AB	Total AB
Developing creative or artistic skills is a good thing	96%	96%
It is important to connect with your creative side sometimes	93%	95%
Having arts experiences available makes this a better place to live	87%	90%
Arts education is an important part of my child(ren)'s development as they grow up*	86%	88%
Arts experiences allow me and my family to connect with our culture	58%	61%

Base: Regional AB respondents (n=360); *Have children under 18 in household (n=104)
Q15. Below are a few statements about arts education; please review them and tell us if you agree or disagree with each one.

Relevance of artistic experiences is seen across Alberta.

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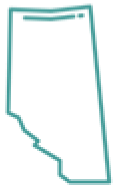
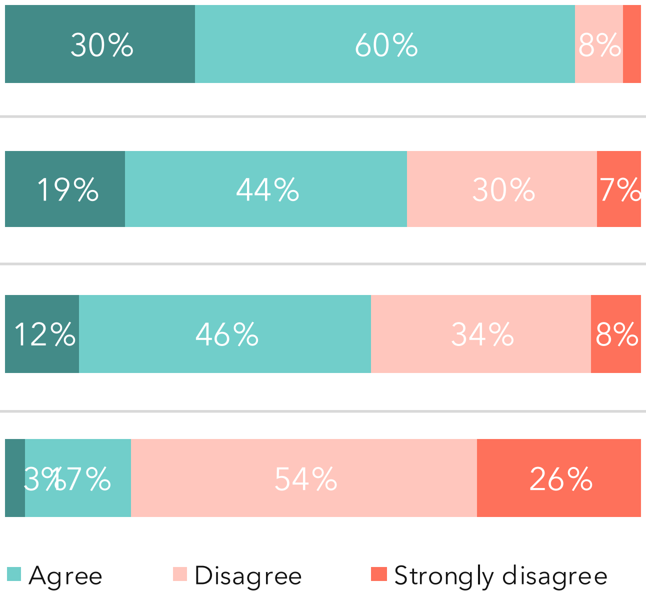


However, audiences are mixed when considering themselves as creative. This is a common sentiment across the province and suggests creativity *can* be intimidating and the idea of not considering themselves creative could be a limiting factor to participation in activities.

Perceptions of arts education on personal/child development



	% Agree (STRONGLY+AGREE) Regional AB	Total AB
It is my hope my child(ren) continue(s) artistic pursuits as they get older*	89%	92%
Some of the most fun I have experienced has been in artistic/creative activities or experiences	63%	66%
I appreciate and enjoy the arts, but I don't consider myself creative	58%	53%
Arts experiences are for other people, not really for me/my family	20%	20%

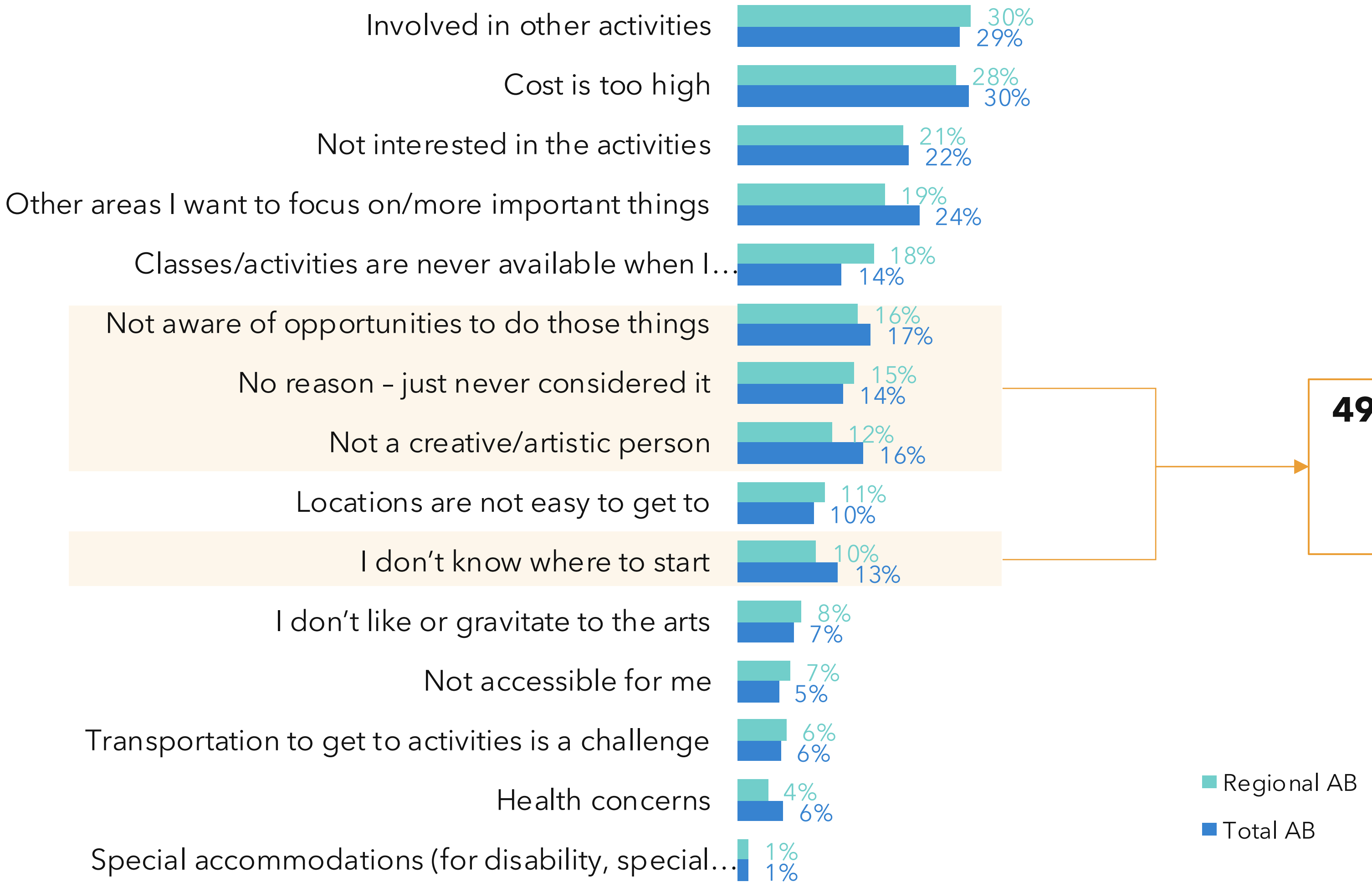
Note: As a negative statement, reversed, this translates to 80% agree that arts experiences <u>are</u> relevant to them

Base: Regional AB respondents (n=360); *Have children under 18 in household (n=104)
Q15. Below are a few statements about arts education; please review them and tell us if you agree or disagree with each one.

Many adults across the province are simply unaware or complacent, which presents a significant opportunity.

Regional Alberta audiences have a higher propensity to identify availability as a reason to not engage.

Reasons for NOT participating in arts education activities



49% identify lack of awareness or need for reassurance.

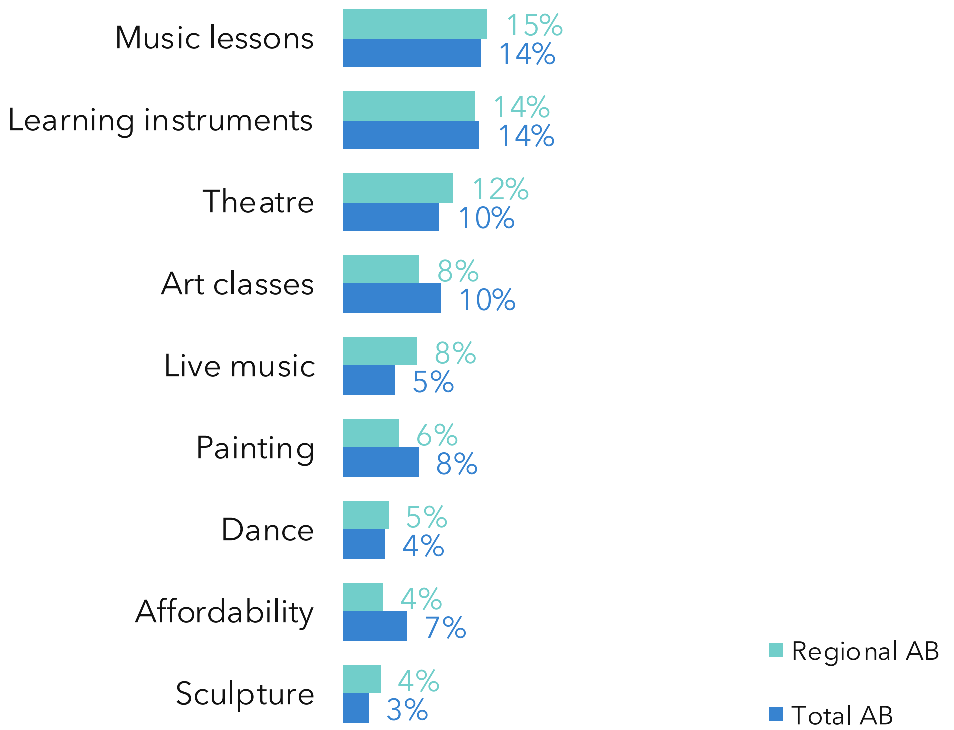
53% Albertans

Base: Have not participated in arts related activities or experiences in the past two years- Regional AB (n=205); Total AB (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?

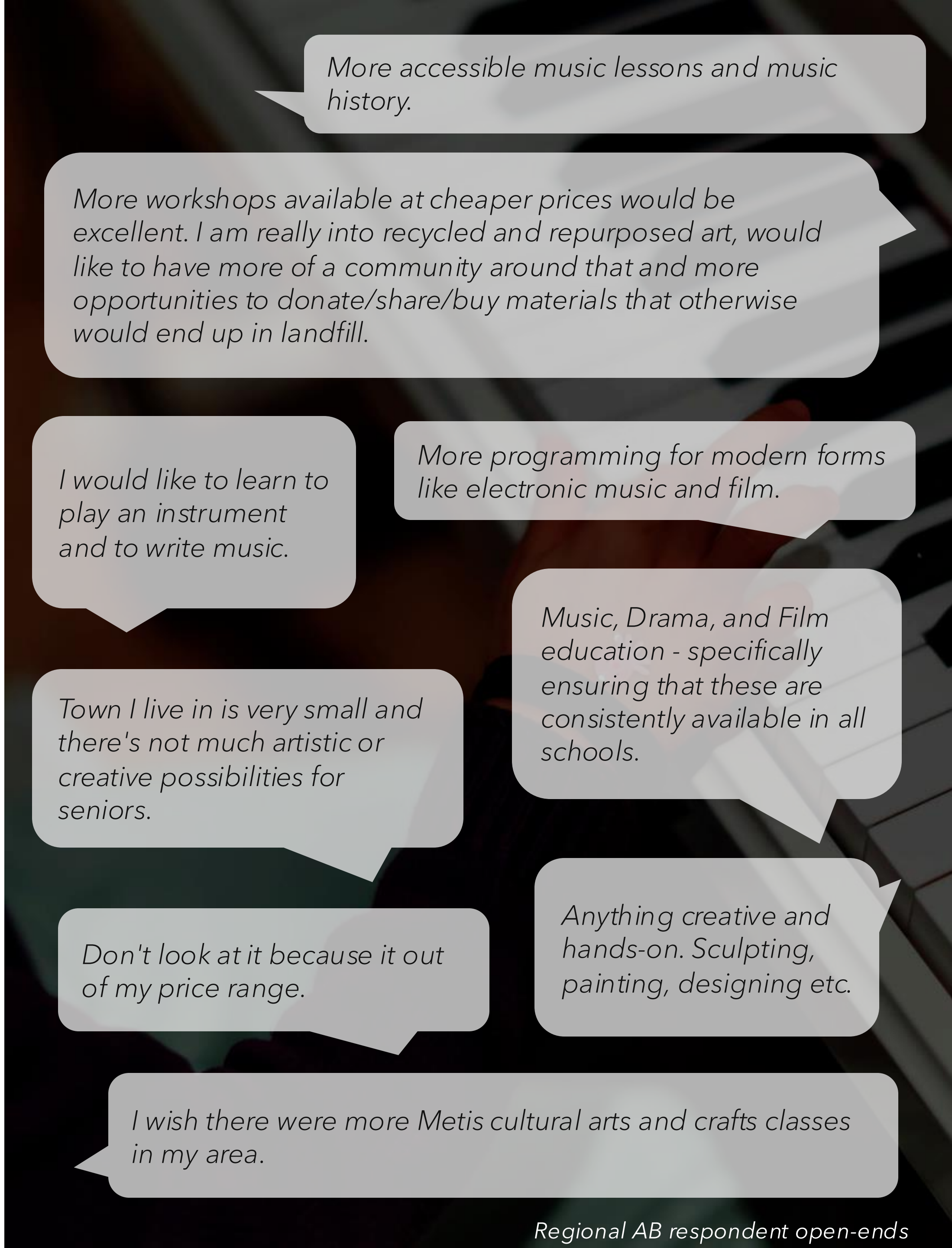
What art experiences do Albertans want available?

In general, desires are similar across the province when it comes to art experiences – specific art forms are mentioned most often. There is slightly greater preference for regional audiences to want theatre and live music available to them.

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



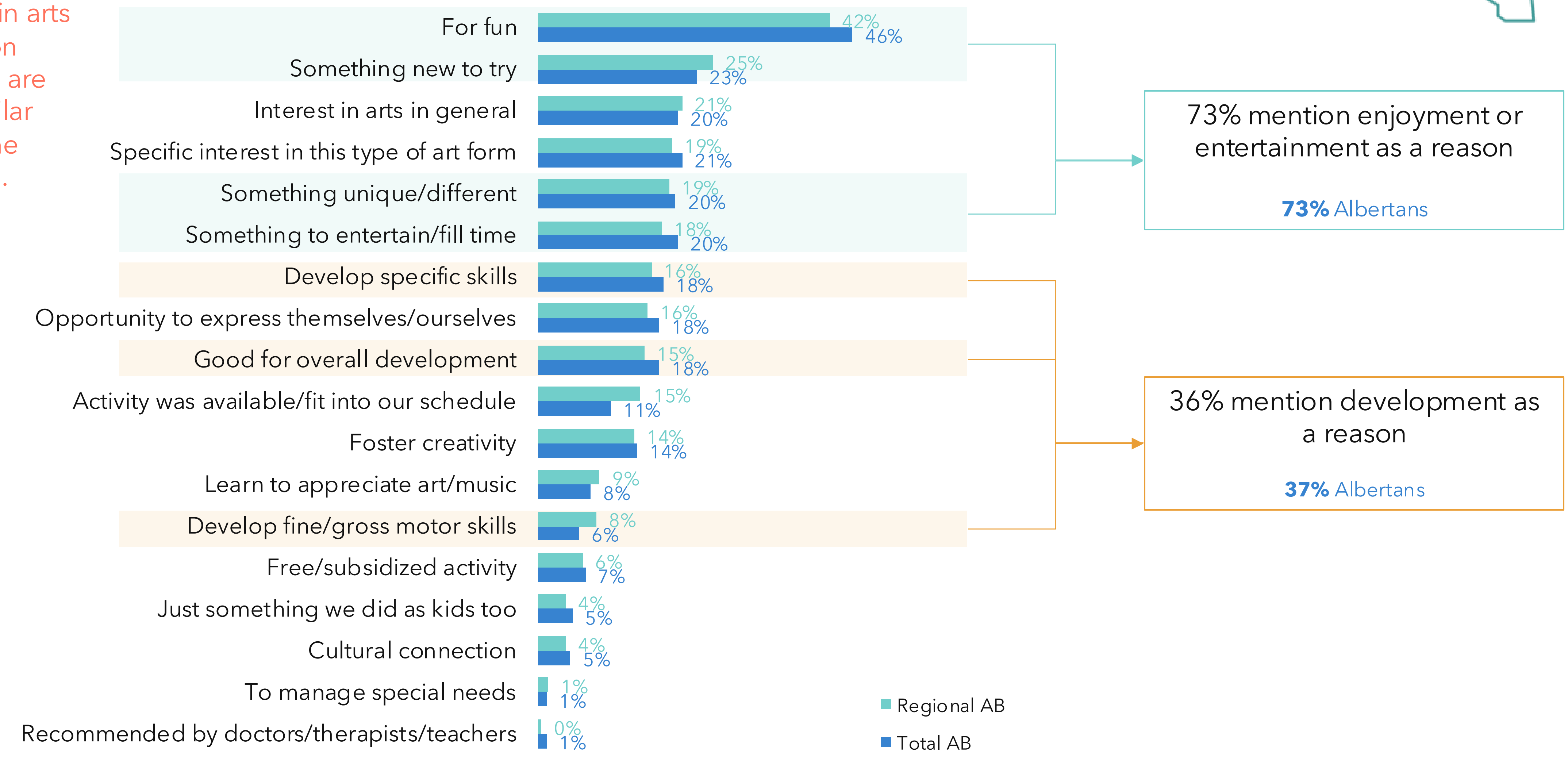
Base: Regional AB (n=360); Total AB (n=1,160)
Q16. What types of arts education experiences, if any, do you wish were available to you and/or your family? This could be anything – playing or learning an instrument, general learning about art or music history, trying or learning about a new art form, art appreciation class, theatre, etc.



Enjoyment is of superior importance for adults compared to development.

Reasons to engage in arts education activities are very similar across the province.

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 – Regional AB (n=201); Total AB (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).

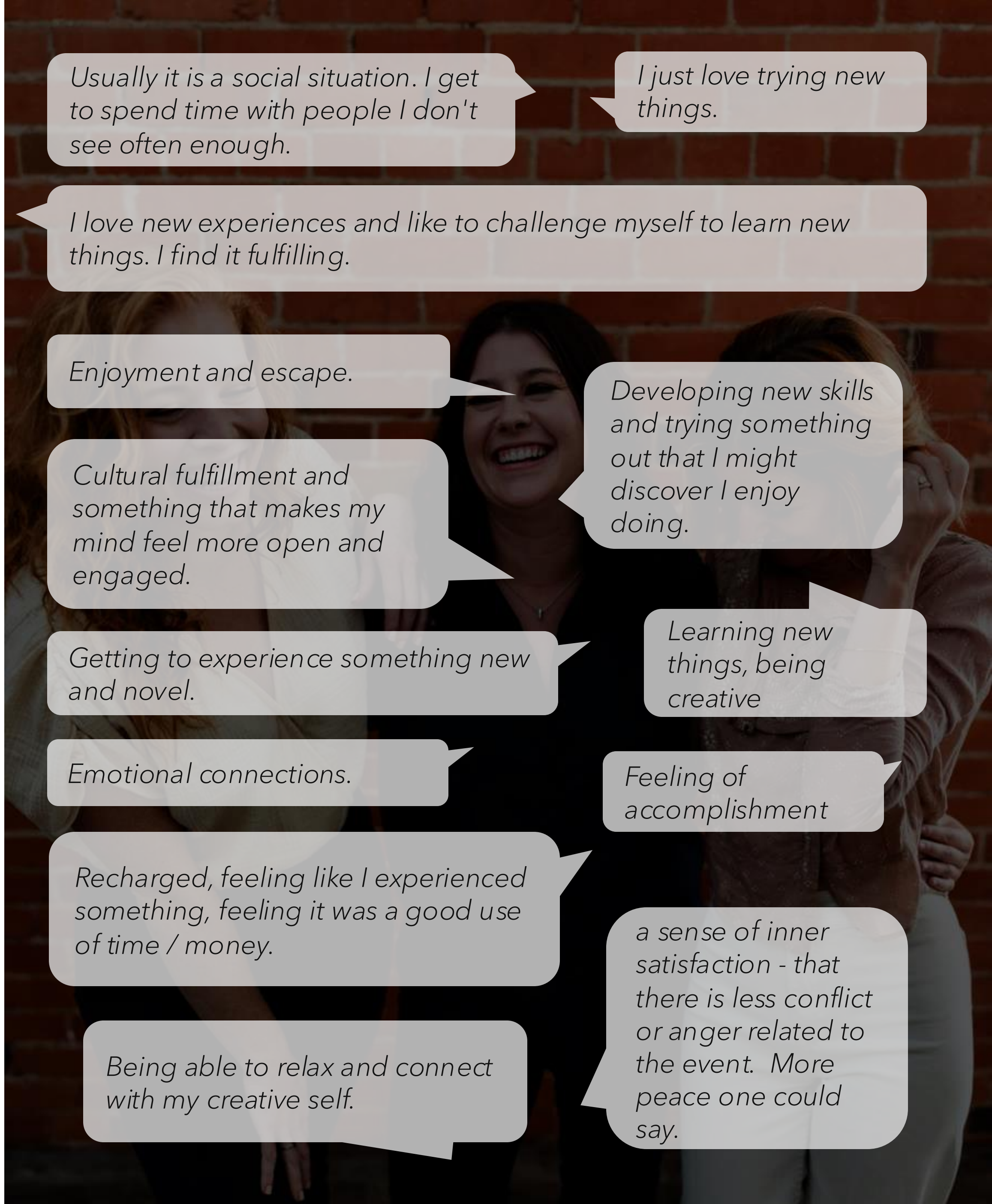
What do Albertans get out of attending arts experiences?

For the most part, it's the combination of benefits and personal development that makes art experiences different than other activities.

Personal outcomes from experiencing/participating in arts

Mentions of 5% or more

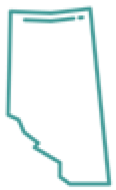
Base: Regional AB respondents (n=360); Total AB respondents (n=1,160)
Q32. What is it that you personally get out of attending an arts related experience or participating in an arts related activity that you do not get from other types of experiences/activities? (This could be anything.)



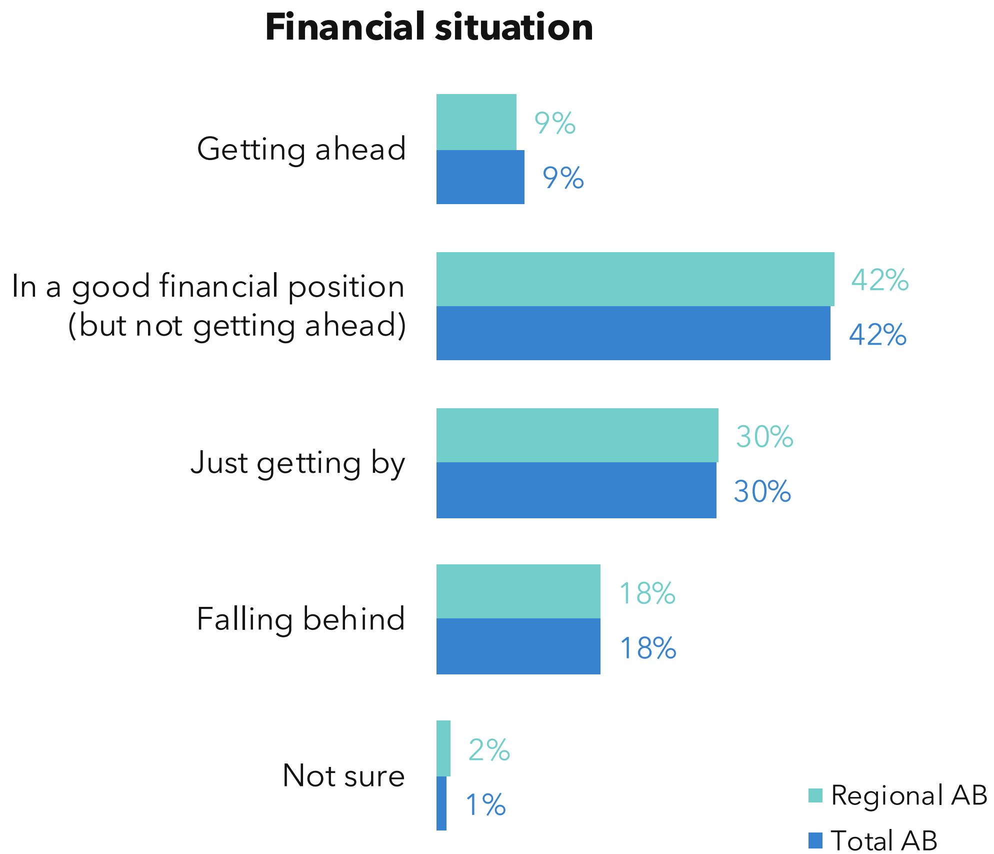
Regional AB respondent open-ends

Understanding Spending and Affordability

Financial situations can be described as stable or struggling.



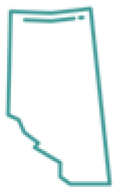
A slightly higher proportion of Central and Southern Albertans feel as though they are 'just getting by' or 'falling behind' which serves as a reminder of the consumer mindset while facing challenging economic conditions and gives insight into how they will spend.



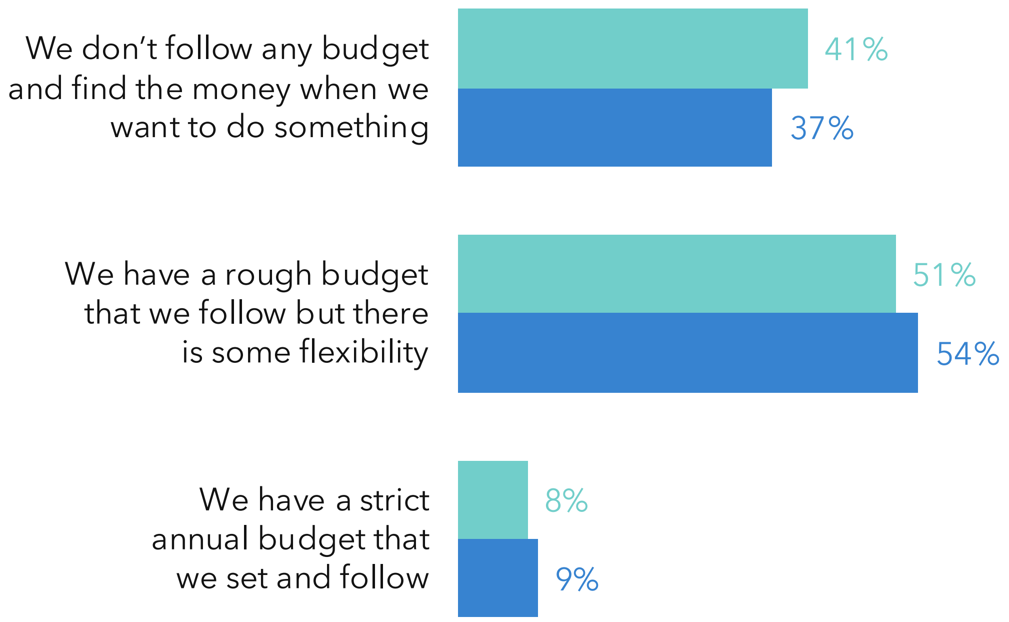
Base: Regional AB respondents (n=360); Total AB respondents (n=1,160)
Q36. Thinking about your own financial situation and the overall cost of living, are you...?

However, Albertans are still spending on activities.

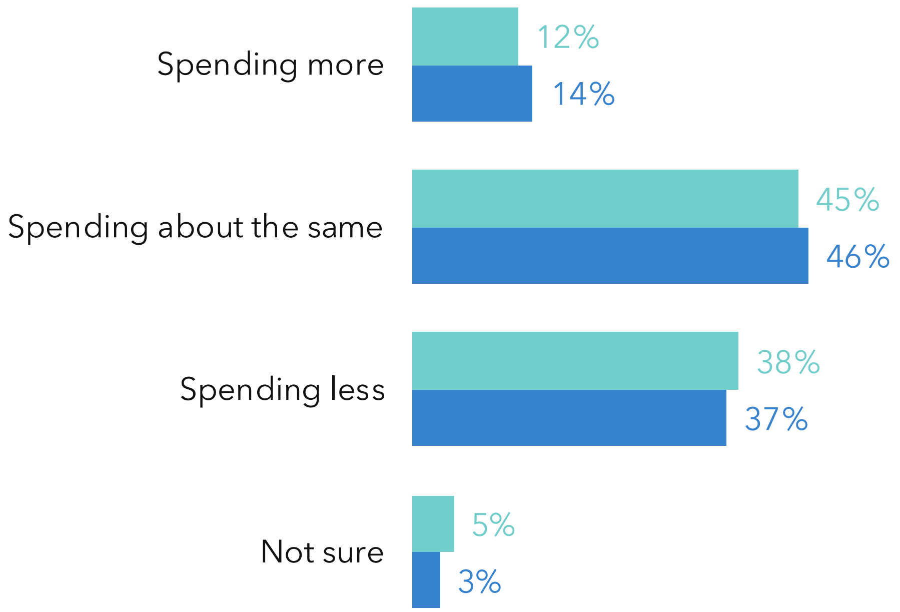
Even with a ‘getting by’ or ‘falling behind’ mindset, 63% of Central Albertans and 60% of Southern Albertans are spending the same or more on discretionary activities as last year – slightly higher than Northern audiences (48%). This tells us Albertans are making very informed and sensible decisions on which activities they will engage in by looking at the value. As an arts organization, it is critical to show audiences that your offerings are ‘worth it’.



Budget for discretionary experiences and activities



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



Regional AB Total AB

Base: Regional AB respondents (n=360); Total AB 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…?

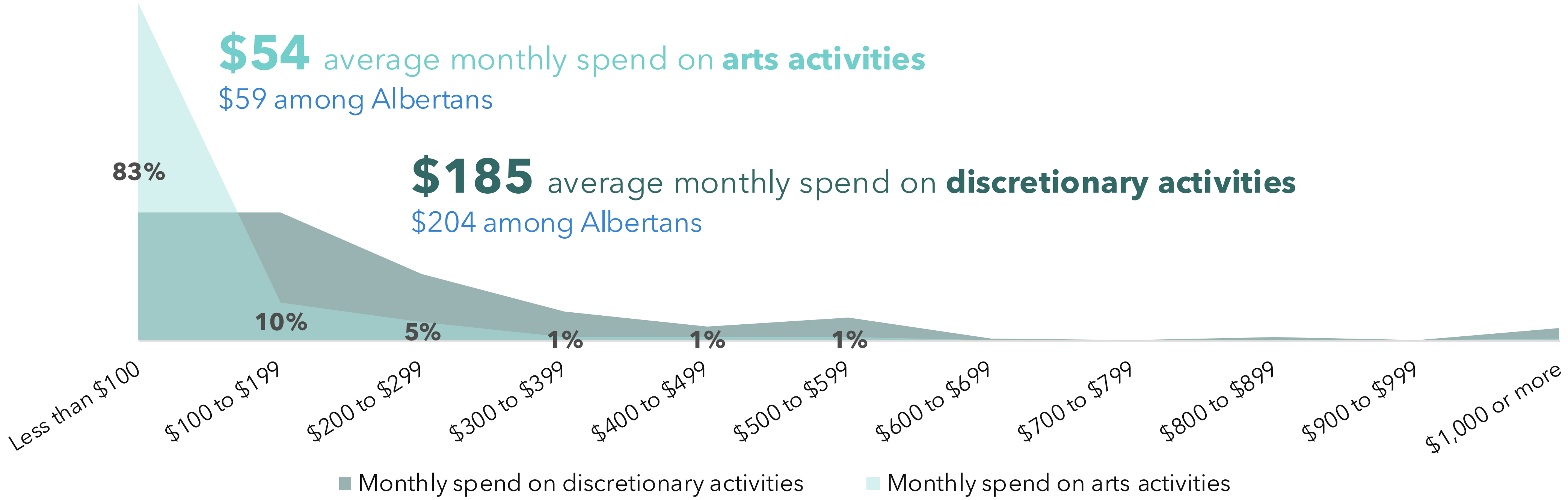
Regional Albertans are only spending slightly less on discretionary activities compared to those in city centres.

Stone—Olafson

How much do you spend on activities?

$54 average monthly spend on **arts activities**
$59 among Albertans

$185 average monthly spend on **discretionary activities**
$204 among Albertans

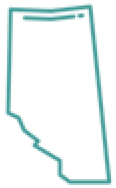


Discretionary activities defined as: Any discretional activity, experience, or thing to do outside of your regular expenses or financial obligations (mortgage, rent, groceries, transportation, debt, etc.). This could include spending on dining, recreation, classes you take, activities, arts and culture,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

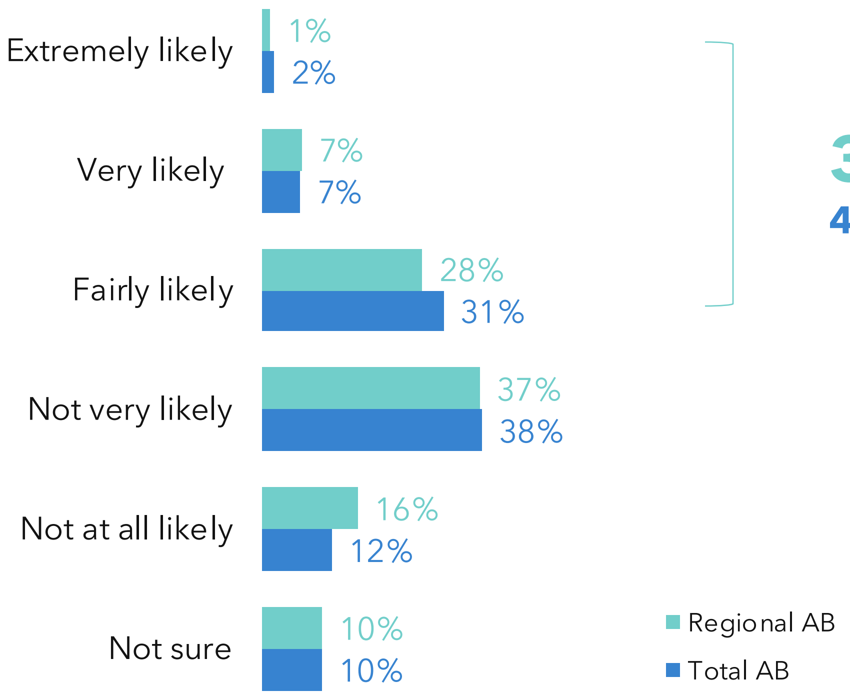
Data reflects self-reported spend. Base: Respondents who spend on discretionary and arts experiences – Regional AB (n=263) – outliers removed
Q17. The next few questions ask you about spending on experiences. Overall, how much would you estimate you spend every month on EXPERIENCES?
Q19. When you think 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.



Across the province, the proportion who are very or extremely likely to spend more is small – and slightly smaller in regional markets. 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



36% 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 – Regional AB (n=348); Total AB (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?

Stone — Olafson

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

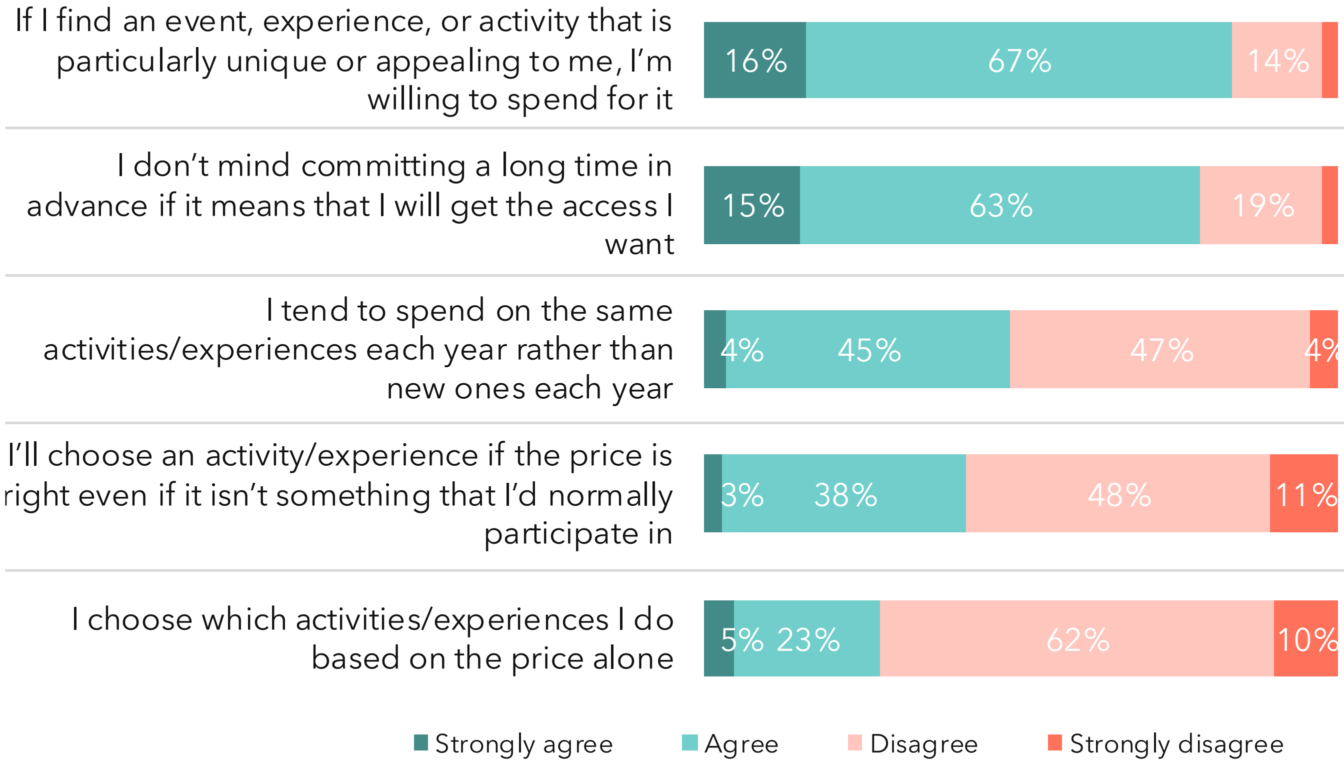
When comparing audiences within these regions, ease and flexibility (which are fundamental for any activity provincially) have slightly greater importance for Northern audiences while Central and Southern audiences place slightly greater importance on experiences that make them feel something and shareable experiences.

Messages to increase consideration to spend more on arts experiences/activities	**Regional AB**	**Total AB**
Activities/experiences that are easy to enjoy and do	47%	50%
Activities/experiences that help me learn something new	47%	47%
Something that I can do with my friends/social group	43%	44%
The promise of experience that will make me feel something	40%	41%
Something that also supports a cause in the community	38%	36%
Activities/experiences for your whole family or household	30%	27%
Activities/experiences where 'extras' like parking or refreshments are included	27%	34%
Activities/experiences that are interactive	24%	27%
Activities/experiences that are not available anywhere else	21%	24%
Something I can do over and over	18%	20%
Activities/experiences where 'perks' are included	15%	16%
Packages that cost more but deliver savings for more individual experiences	8%	12%
There is nothing organizations could do to get me to spend more	14%	12%

Base: Regional AB (n=360); Total AB (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 audiences in this province 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. In fact, a slightly smaller proportion of audiences outside of Calgary and Edmonton choose based on price alone. Overall, 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.

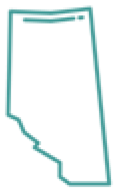


% Agree
(STRONGLY+AGREE)

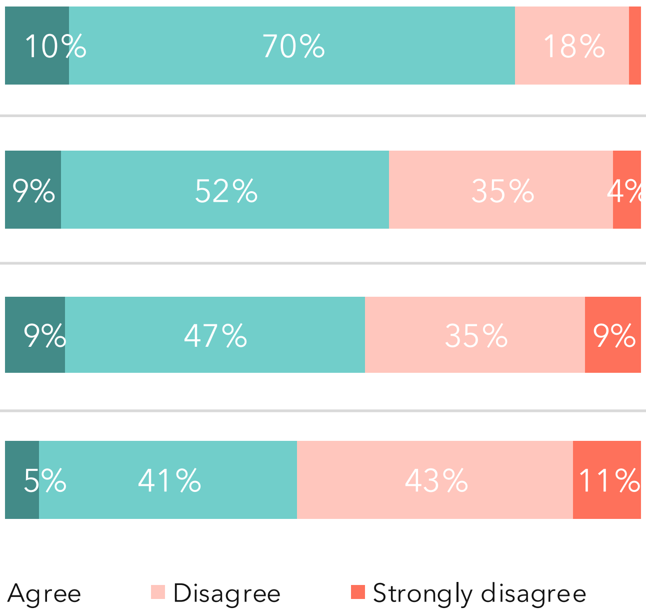
Regional AB	Total AB
83%	85%
78%	79%
48%	51%
41%	43%
28%	32%

Base: Regional AB (n=360); Total AB (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.



Audiences across the province recognize the value of activities and are eager to find price options that fit their budgets. It's not about first determining if they can afford to spend; rather, it's the opposite—they're looking for experiences that align with their financial situation. With tighter budgets, there's a growing desire for a variety of experiences instead of committing a larger share of their spending to just one. Therefore, offering affordable options will be essential for fostering greater engagement and attracting more participants.



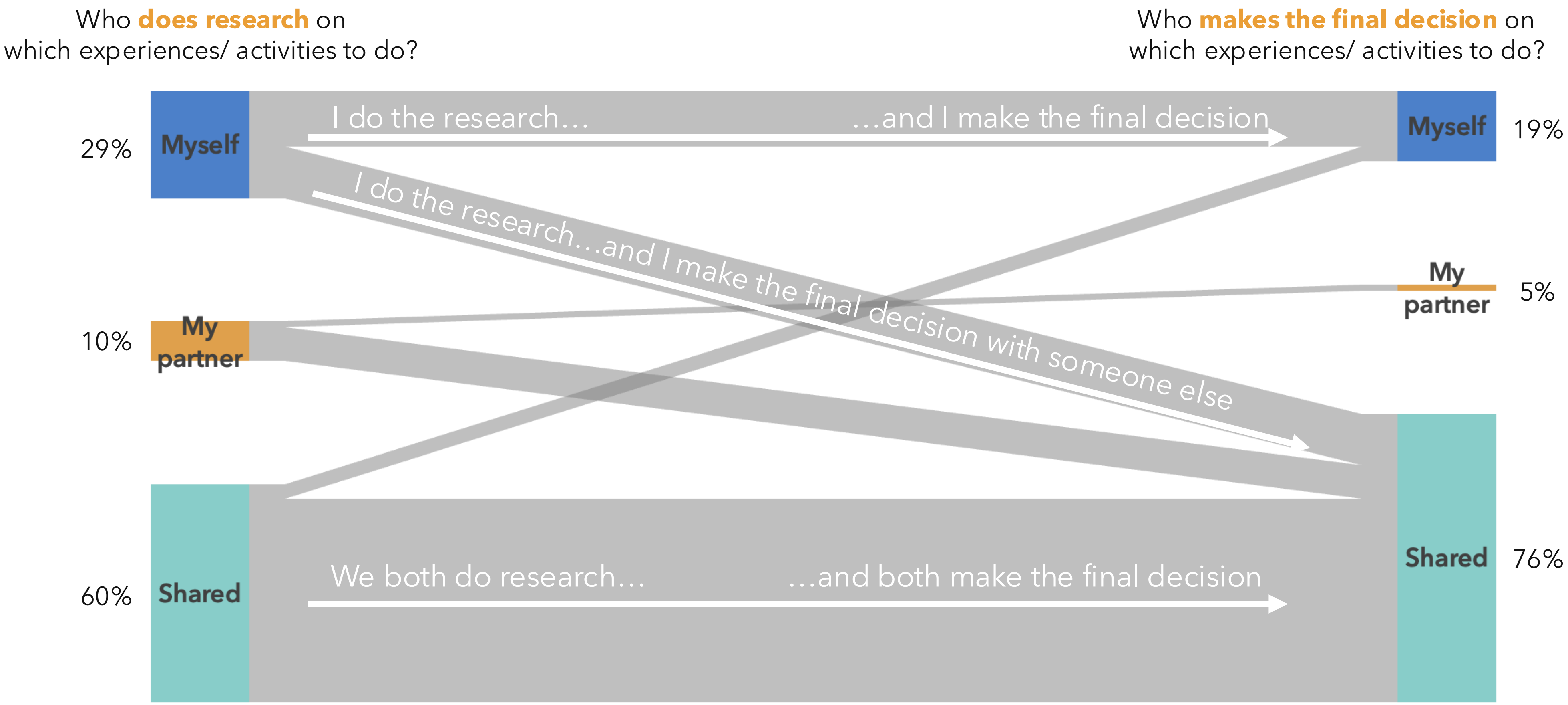
	Strongly agree	Agree	Disagree	Strongly disagree	% Agree (STRONGLY+AGREE) Regional AB	% Agree (STRONGLY+AGREE) Total AB
I first decide on an activity/experience I'm interested in and then will find a price option that works for me	10%	70%	18%		80%	82%
I prefer to budget for many activities/experiences at a lower cost rather than spending it all in one place	9%	52%	35%	4%	60%	63%
I have a specific amount I want to spend on activities/experiences, so I pick and choose what fits into that budget	9%	47%	35%	9%	56%	57%
I'll take advantage of promotions even if it's not the lowest price – I just love a deal!	5%	41%	43%	11%	46%	50%

Base: Regional AB (n=360); Total AB (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.

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.



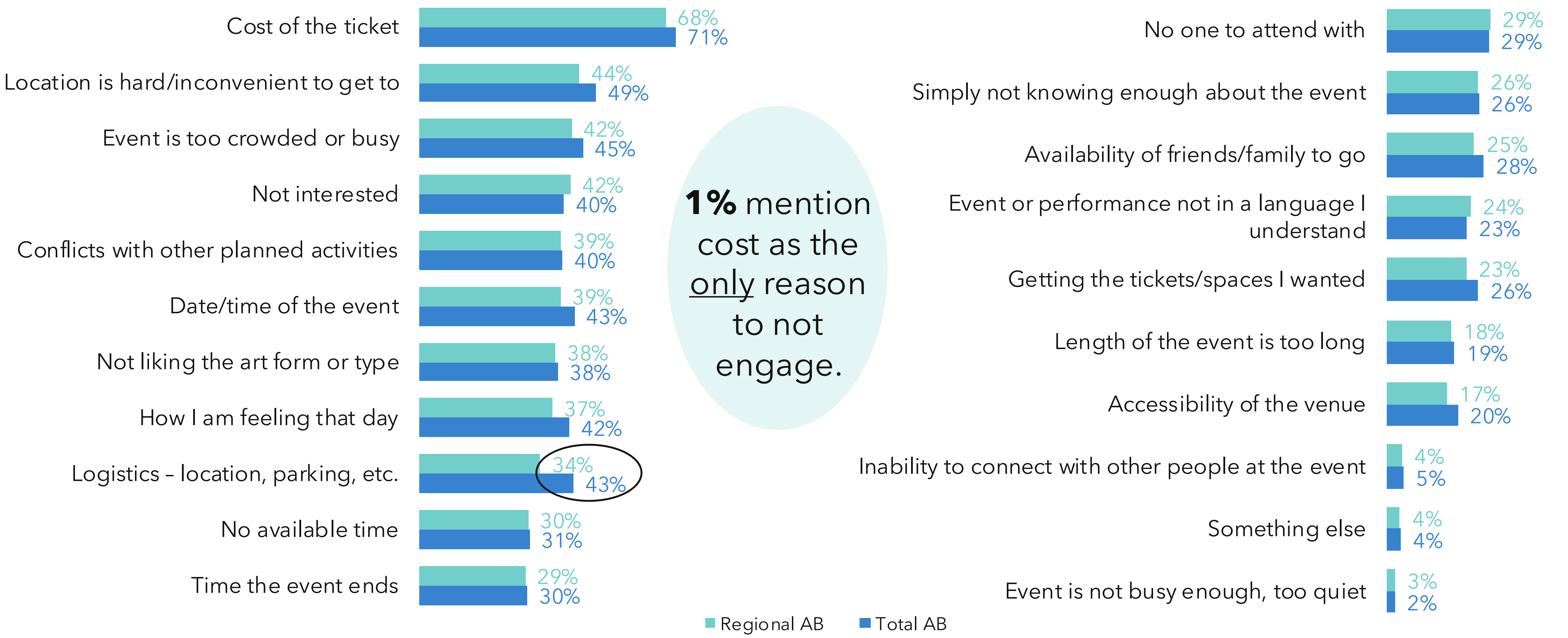
Base: Respondents who live with at least one other person – Regional AB (n=311); Total AB (n=963)
Q25. In your case, who typically does the research and comes up with ideas on what activities and experiences you might do?
Q26. And how about the final decision? Who typically makes the final decision on what activities or experiences to do?

Stone — Olafson

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

Cost is undoubtedly a critical factor, but there are additional barriers that affect all Albertans. Location and convenience also play significant roles, although logistics tends to be less of an issue outside of city centres.

Barriers to participation

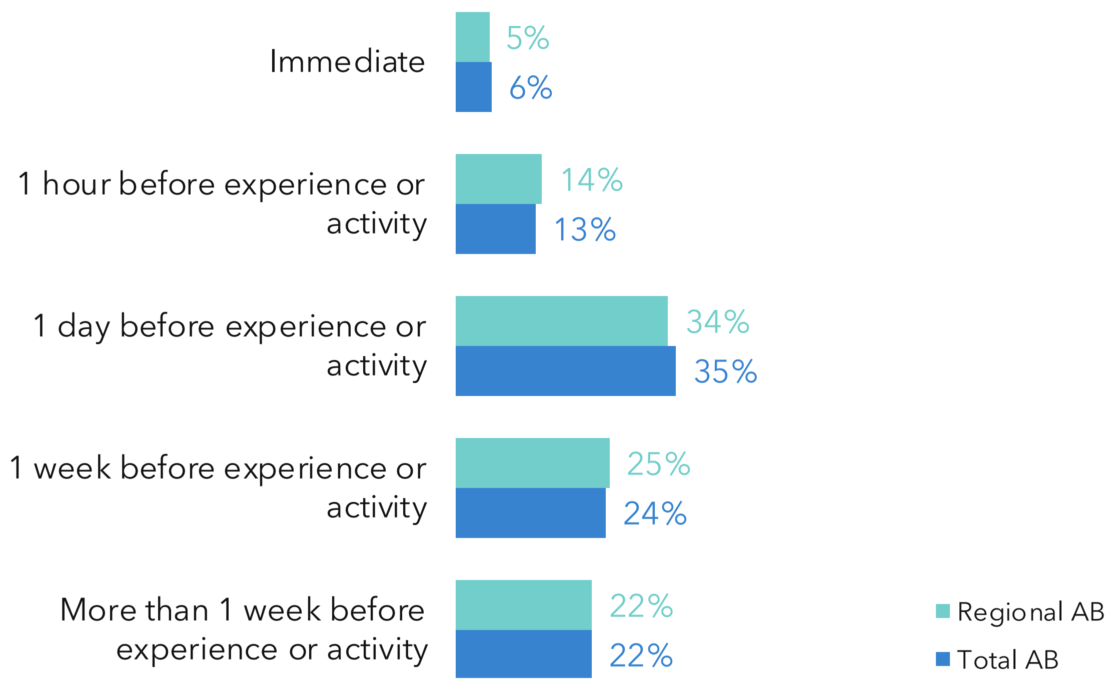


Base: Regional AB (n=360); Total AB (n=1,160)
Q31. Thinking about any decision, short or long term, that you make about attending events or participating in arts related activities/experiences, what are those things that are most likely to prevent you from going? This could be anything that stops you from making that final decision to attend or purchase tickets. Select all that apply.

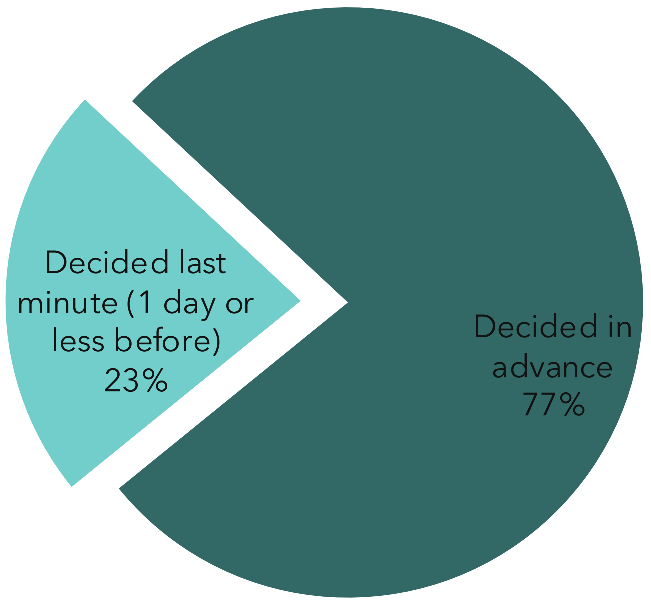
Regional Albertans are mostly planners with with few committing to a 'last-minute' experience.

Planning behaviour is similar across regions in this 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 planning behaviour.

Defining last-minute timeframe for planning experiences/activities



Planning for all experiences/activities



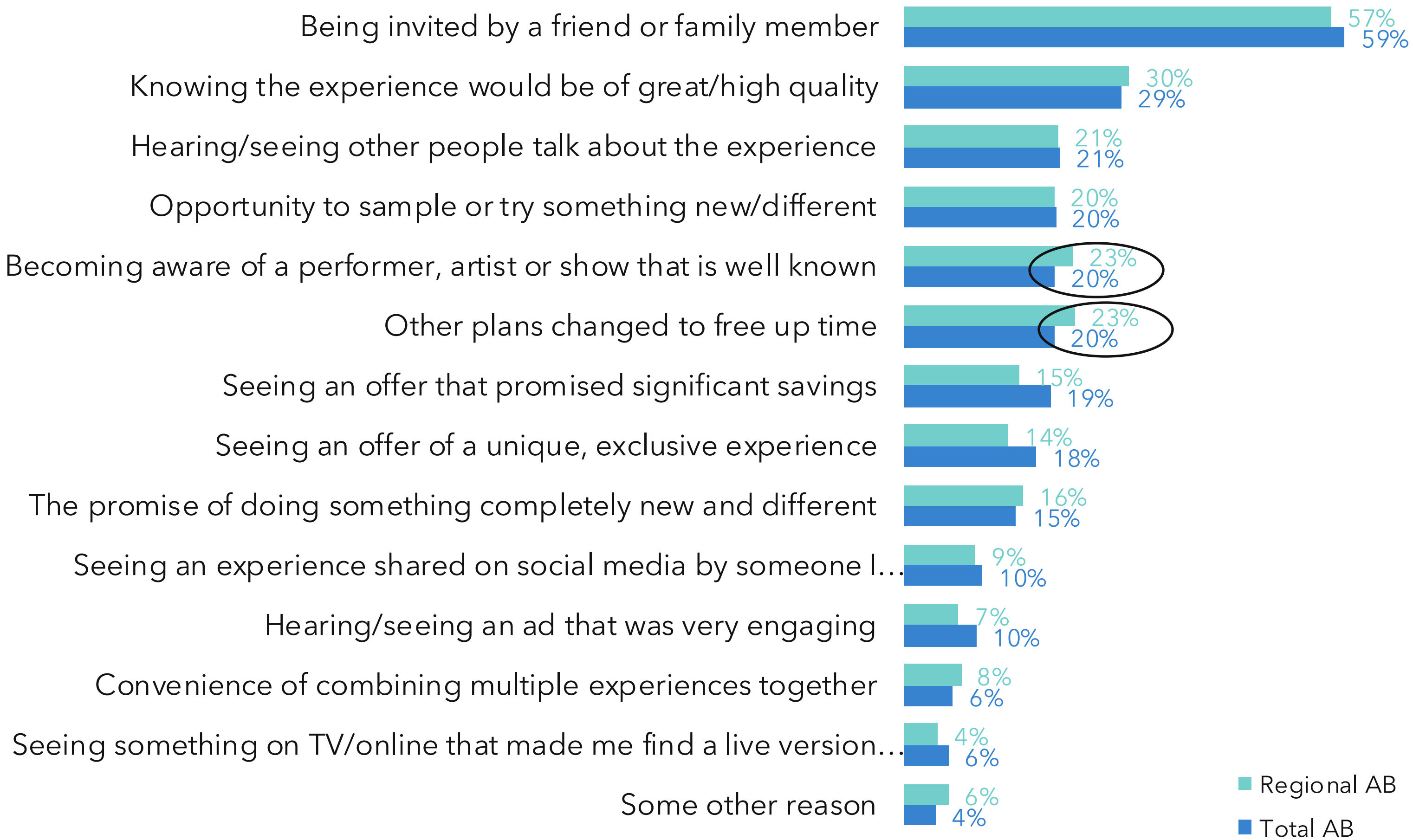
Base: Regional AB (n=360); Total AB (n=1,160)
Q27. Thinking about the timeframe in which you typically make decisions to participate in experiences or activities, what would you consider to be 'last minute' or an 'impulse' decision?
Q28. When you think about all the experiences you typically engage in, what proportion are decided well in advance? How about last minute?

Awareness and opportunity will be THE factors inspiring impulse engagement.

Audiences outside of Calgary and Edmonton are also slightly more motivated by factors such as awareness of well-known performers/artists and adjustments in personal schedules.

Messages to inspire last-minute experiences/activities

Top 3 selections



Base: Regional AB (n=360); Total AB (n=1,160)

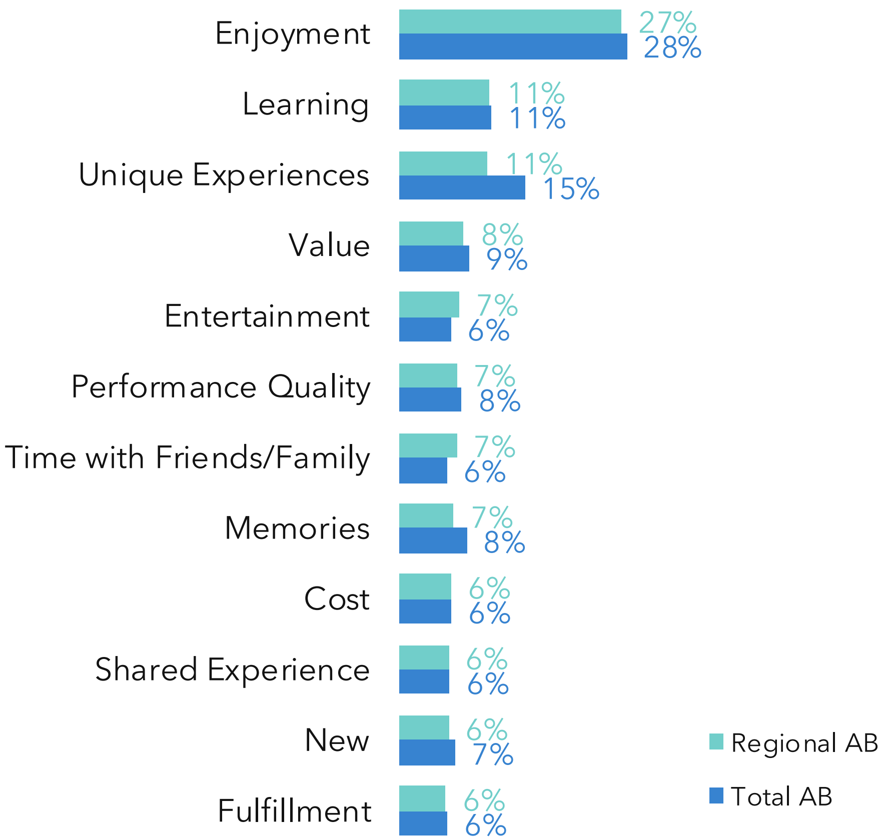
Q30. What is most likely to inspire you to do something at the last minute? Select up to three.

What makes art experiences or activities worth it?

To draw audiences across Alberta in, it will be important to tap into emotions and leave a lasting impression.

Defining what makes an arts experience 'worth it'

Mentions of 6% or more



Base: Regional AB (n=360); Total AB (n=1,160)
Q33. What makes an arts experience or activity worth it (both in time and money)?

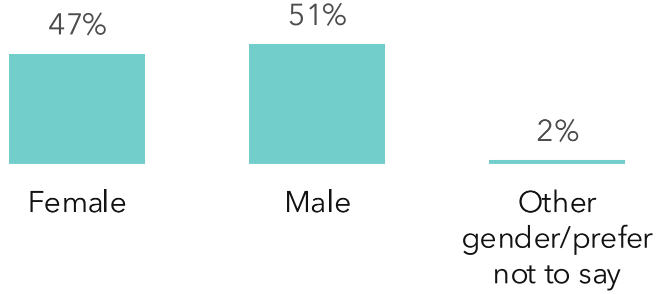
Respondent Profile

Stone — Olafson

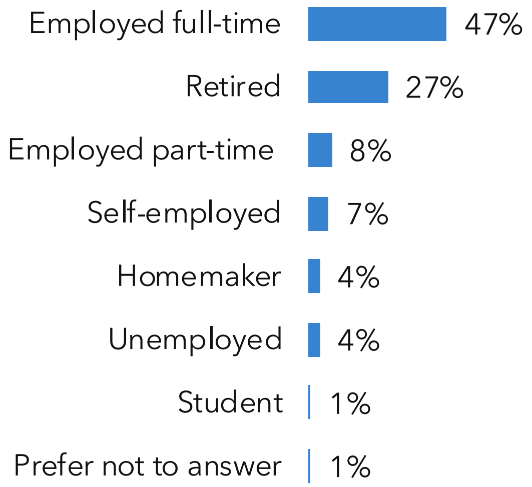
Respondent Profile:
Who We Heard From

Stone — Olafson

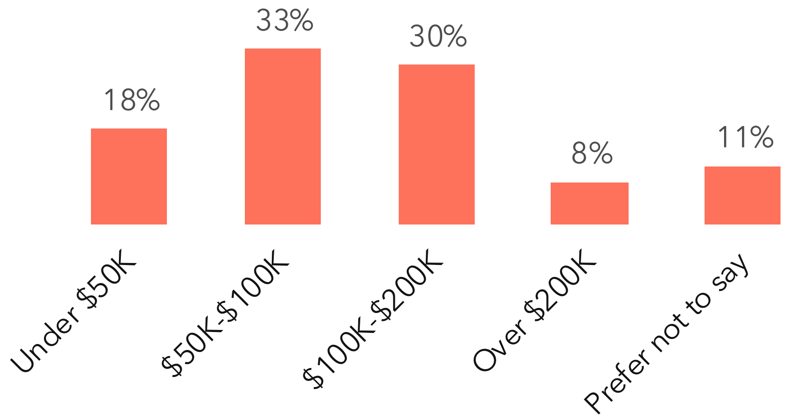
Gender



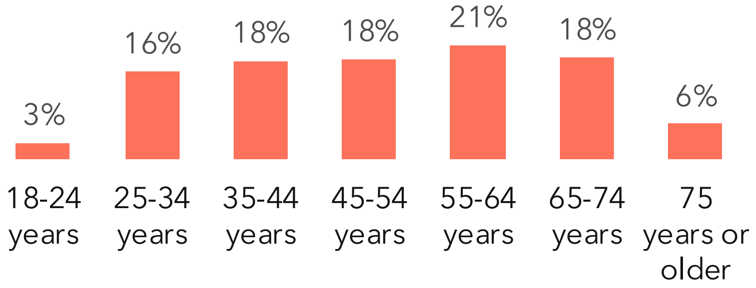
Employment



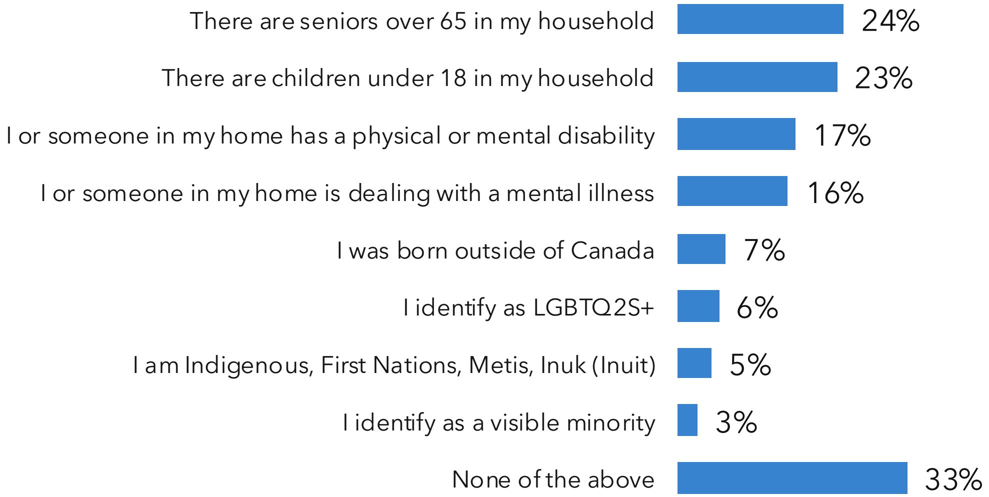
HH Income



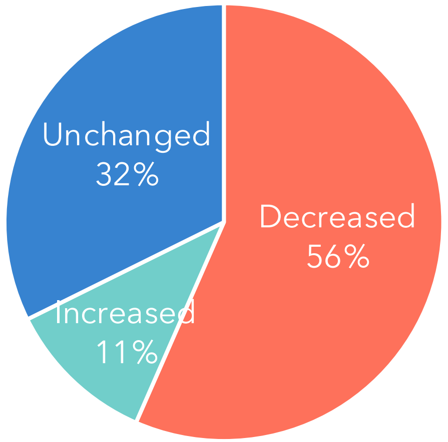
Age



Diversity/Identity



Income Change – Past 3 Years



Base: Regional AB (n=360)

Understanding people.

It's what we do.

Stone — Olafson

Questions or Comments?

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