Content and products offered are most important part of relationship Culture-goers have with arts and culture organizations - personal or cultural connection is most likely to influence attendance.

National Survey | Summary
Conducted by Nanos for Business / Arts and the NAC, May 2024
Field April 28th to May 1st, 2024
Submission 2024-2588

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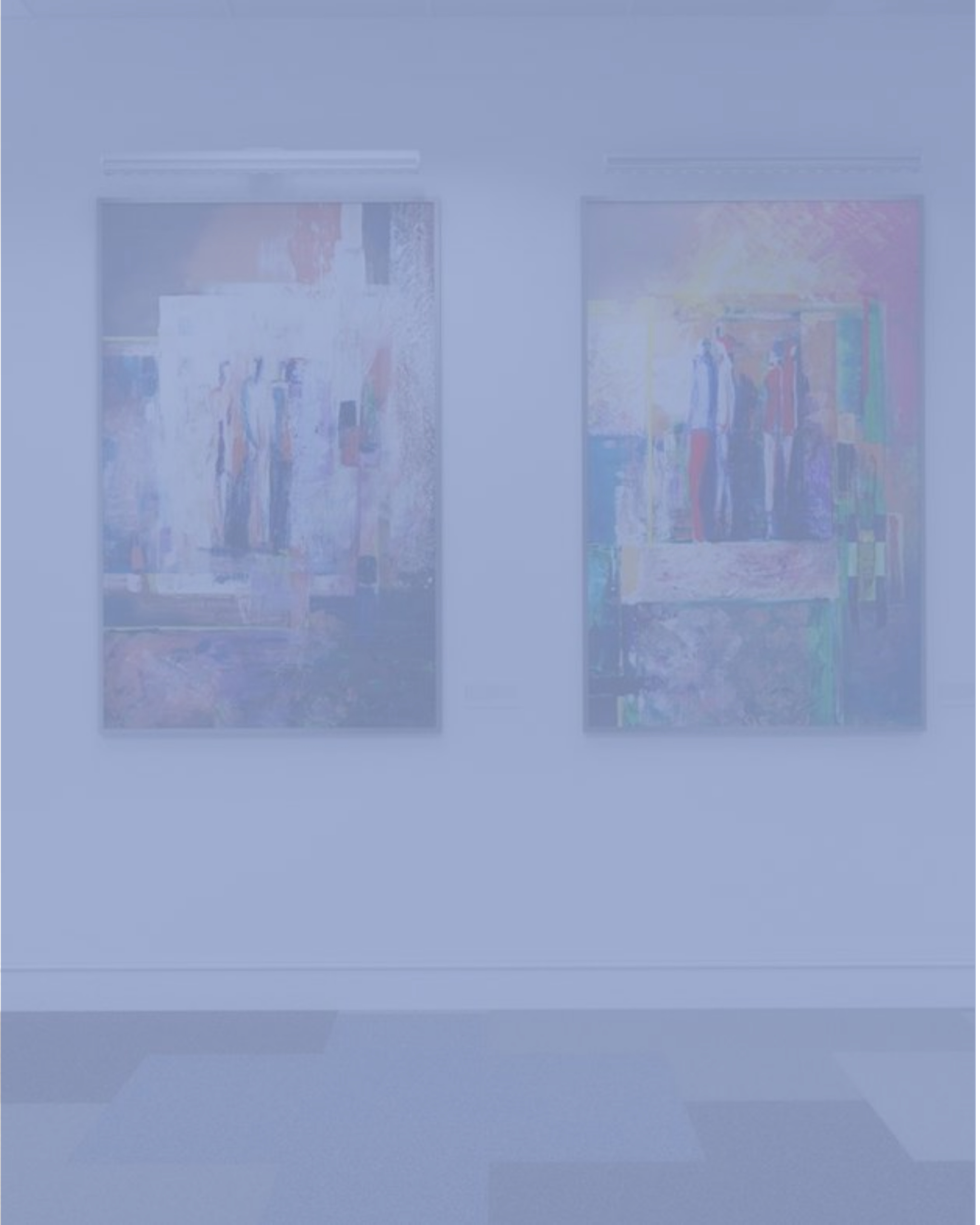

Overview

Nanos conducted an RDD dual frame (land and cell-lines) hybrid telephone and online random survey of 1,086 Canadians, 18 years of age or older, between April 28th to May 1st, 2024 as part of an omnibus survey. The margin of error for a random survey of 1,086 Canadians is ±3.0 percentage points, 19 times out of 20.

The research was commissioned by Business and the Arts and the National Arts Centre and was conducted by Nanos Research.

- **Importance of arts and culture organizations**
- **Past and future engagement with arts and culture organizations**
- **Ticket purchasing personas**
- **Influences on attendance**

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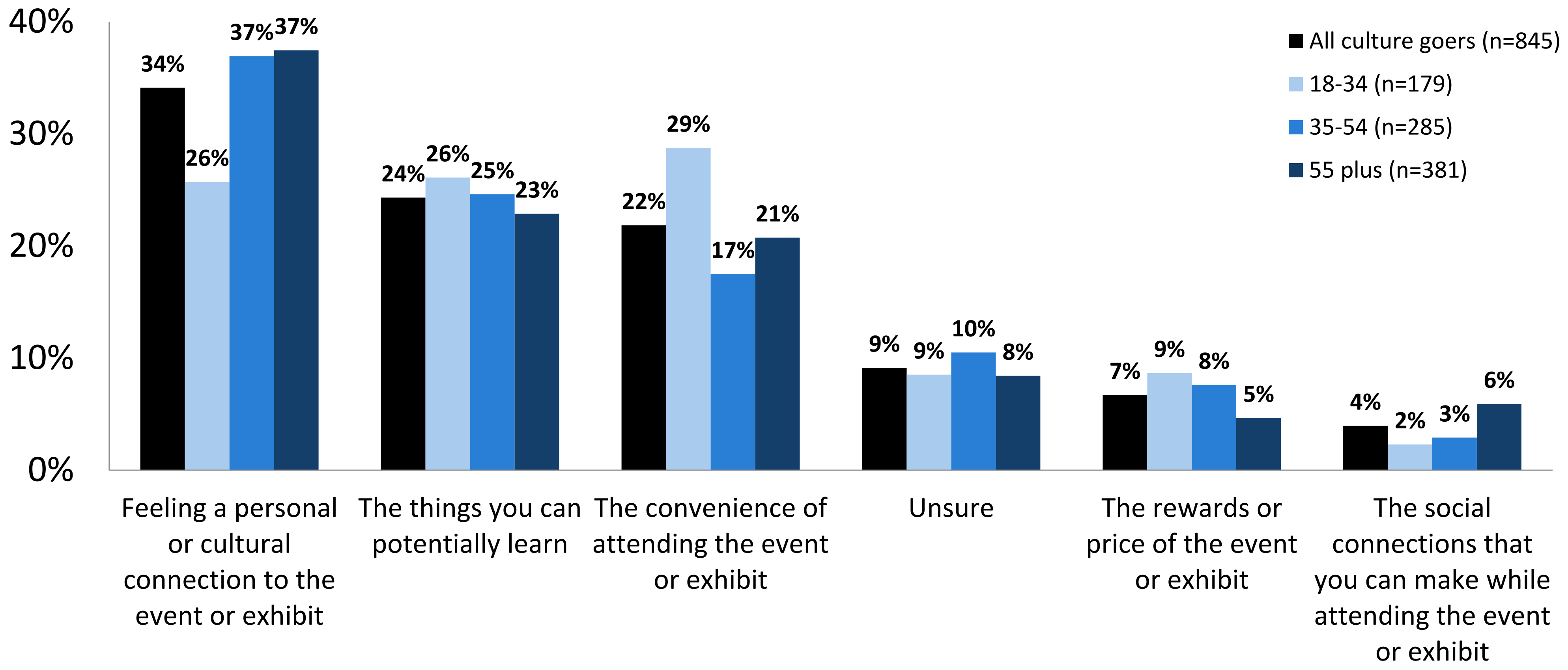
Influence on which arts and cultural event to attend

Q – Which of the following is most likely to influence which arts and cultural event or exhibit you attend (Select one)



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, April 28th to May 1st, 2024, n=845 Culture-goers, accurate 3.4 percentage points plus or minus, 19 times out of 20.

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Close to one in three Culture-goers say the most important part of the relationship they have with arts and cultural organizations is the content/ products they offer.

Those who rate arts and culture organizations as important are less likely to say discounts are important part of the relationship they have with such organizations

9%	5%	1%
Culture-goers who reported low importance of arts and cultural org. (0-3)	Culture-goers who reported average importance of arts and cultural org. (4-6)	Culture-goers who reported high importance of arts and cultural org. (7-10)

Important parts of the relationship Culture-goers have with an arts and cultural organization (first rank)

32%	Content/products they offer
15%	They are essential to my life and/or community
14%	Consistent quality of offerings
9%	Alignment of social values
9%	Reputation of the organization or company

Q – Please rank the top three most important parts of the relationship you might have with an arts and cultural organization where 1 is the most important, 2 the second most important and 3 the third most important. [RANDOMIZE]

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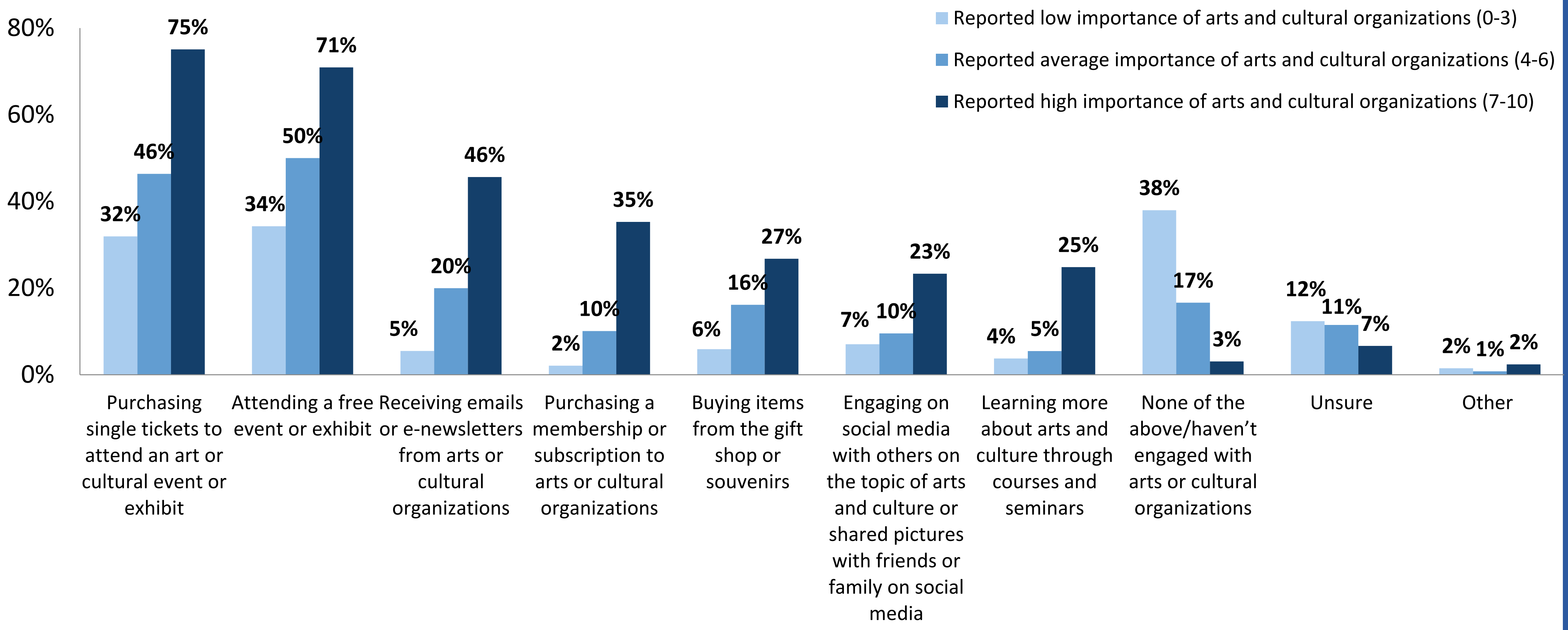
Past and future engagement of culture-goers with arts and cultural organizations

Culture-goers expect their engagement with arts and cultural organizations to change the most through an increase in attending free events and a decrease of engagement through emails and e-newsletters.

	Reported engaging in past year	Expected to engage in next year	Difference
Attended a free event or exhibit	**39.0%**	**59.2%**	**+20.2**
Purchased single tickets to attend an art or cultural event or exhibit	**49.7%**	**59.7%**	**+10.0**
Learned more about arts and culture through courses and seminars	**9.2%**	**16.0%**	**+6.8**
Purchased a membership or subscription at arts or cultural organizations	**19.4%**	**22.8%**	**+3.4**
Engaged on social media with others on the topic of arts and culture or shared pictures with friends or family on social	**18.6%**	**16.9%**	**-1.7**
Bought items from the gift shop or souvenirs	**24.0%**	**20.4%**	**-3.6**
Received emails or e-newsletters from arts or cultural organizations	**45.3%**	**32.0%**	**-13.3**

Interest in engaging with arts and cultural organizations – By profile

Q – Which of the following would you be interested in doing in the next year when it comes to arts and cultural organizations? (Select all that apply) [RANDOMIZE]



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, April 28th to May 1st, 2024, n=843 culture-goers, accurate 3.4 percentage points plus or minus, 19 times out of 20.

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Difference based on ticket purchasing personas

Familiar friends

(Usually purchases many tickets for events/exhibits that interest them throughout the year - 33% of culture-goers)

They are most likely to rank the content/products offered as the most important part of the relationship they have with arts and cultural organizations (42%). Nearly one quarter (23%) are interested in engaging on social media with others on the topic of arts and culture.

Social attendees

(Usually only purchases tickets for events/exhibits if someone else invites them - 17% of culture-goers)

The content/products offered is the most important part of the relationship they have with arts and cultural organizations (36%). Feeling a personal or cultural connection to the event or exhibit is most important to them when it comes to choosing which arts and cultural events and exhibits to attend (32%).

Bed rock subscribers

(Usually purchases yearly ticket memberships, subscriptions, and packages - 9% of culture-goers)

Two in five say feeling a personal or cultural connection to the event or exhibit is the likely to influence which arts and cultural event or exhibit they attend (42%). A majority are interested in receiving emails/e-newsletters (65%), more so than the other profiles. They are also the most likely to rank “They are essential to my life and/or community” as the most important part of the relationship they have with arts and cultural organizations (31%).

Special scene

(Usually purchases tickets for events and exhibits that are big blockbusters only - 8% of culture-goers)

Nearly one third say the convenience of attending the event or exhibit is most likely to influence their attendance (32%). They are more likely than other profiles to rank the alignment of social values first (21%) as the most important part of the relationship they have with arts and cultural organizations.

Difference based on ticket purchasing personas - Continued

Rare attendees

(Does not usually purchase tickets for or attend arts and cultural performances - 14% of culture-goers)

Just over one in ten say arts and cultural organizations are important to them (12%), the lowest of any of the profiles. Nearly three in four (73%) say they haven't engaged with arts or cultural organizations in the past year, however, over one in three (38%) report being interested in doing so in the next year.

Free attendees

(Usually only attends free events and exhibits - 12% of culture-goers)

The convenience of attending (29%), and the things they can learn (25%) are most likely to influence which arts and cultural events or exhibit they attend. Two thirds are interested in attending a free event/exhibit in the next year (67%) and just over one third are interested in purchasing tickets (38%).

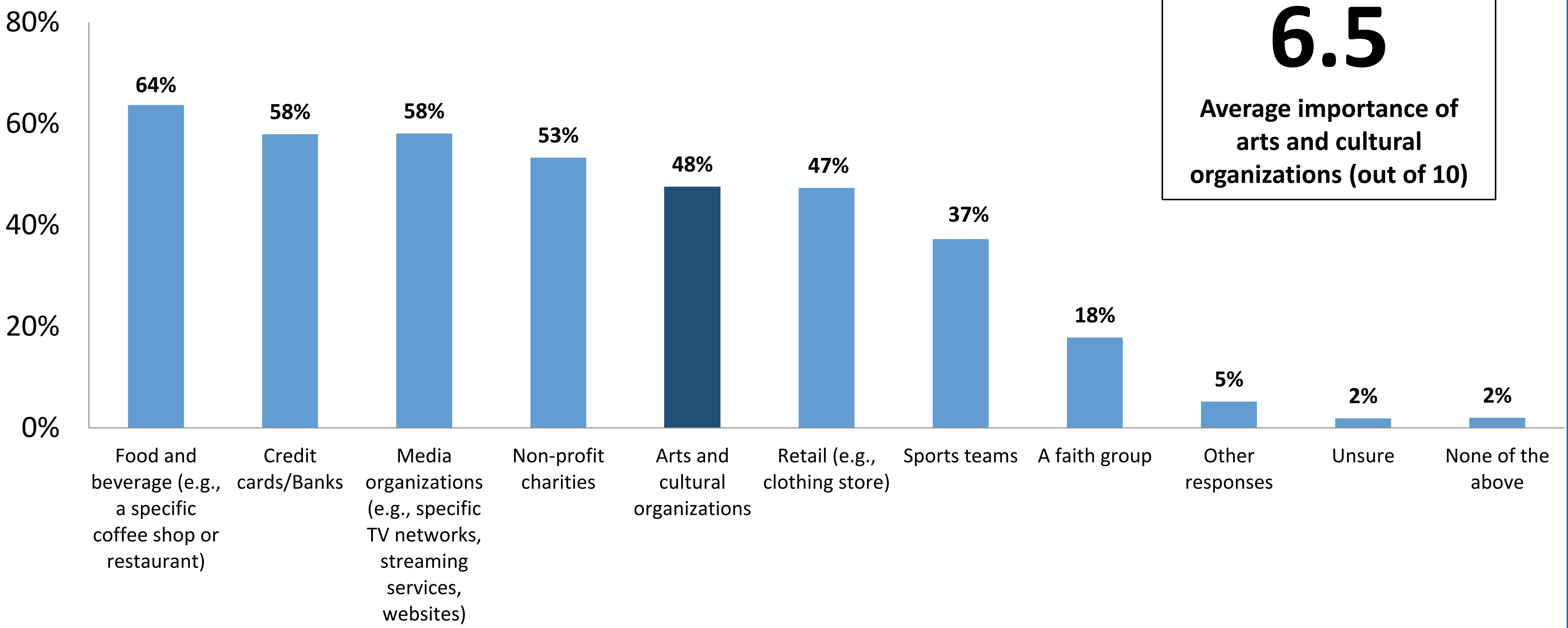
Discount hunters

(Usually only purchases tickets for events and exhibits if they can get a discount or a rebate - 6% of culture-goers)

The content/products being offered and subsequently the essential role those play in the life and/or community are the top two most important parts of the relationship that discount hunters have with arts and cultural organizations. The rewards or price of the event/exhibit is more important to them as a factor when deciding which events/exhibits to attend than other profiles.

Important types of organizations

Q – Which of the following types of organizations or companies do you feel are important to you? [RANDOMIZE] (Select all that apply)



6.5

Average importance of arts and cultural organizations (out of 10)

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, April 28th to May 1st, 2024, n=844 Culture-goers, accurate 3.4 percentage points plus or minus, 19 times out of 20.

Personas – Perceived personal importance of arts and culture organizations for culture-goers

Culture-goers who attribute high importance to arts/culture organizations (7-10)

- They are more likely than the other profile to say non-profit charities are important to them (63%).
- Nearly one in four say the most important part of the relationship they have with arts and cultural organizations is that they are essential to their life and/or community (24%).
- Close to one in two usually purchase many tickets for events and exhibits that interest them throughout the year (45%).
- Over one in ten say they usually purchase yearly tickets and memberships (14%).
- Over one in three (38%) say a personal connection to the event is most likely to influence which arts and cultural event they attend.

Culture-goers who attribute average importance to arts/culture organizations (4-6)

- Over one in five say arts and cultural organizations are important to them (22%). The top important organizations include food and beverage (67%) and credit cards/banks (60%).
- The content/products offered are the most important part of the relationship they have with arts and cultural organizations (40%).
- They are more likely to only purchase tickets for events if someone else invites them (25%) than other profiles.
- In the past year, about one in three say they have purchased single tickets (39%) or attended free events/exhibits (31%). Over one in four received emails or e-newsletters from arts and cultural organization (28%).

Culture-goers who attribute low importance to arts/culture organizations (0-3)

- They report more frequently that credit card/banks (69%), and food and beverage (60%) organizations are important to them. Less than one in twenty (four per cent) say arts and culture organizations are important to them.
- The content/products offered are the most important part of the relationship they have with arts and cultural organizations (23%).
- They are more likely to say they do not purchase tickets or attend arts and cultural performances (45%).
- Over one in two report not having engaged with arts and cultural organizations in the past year (59%). They are most interested in attending free events/exhibits (34%) or purchasing single tickets (32%) in the next year.

Expected frequency of attendance in next 12 months for culture-goers – May 2024

While a majority of Canadians continue to report attending indoor arts and culture events in the past three years (62% for indoor events, 54% for museums), expected frequency of future attendance in the next year is now lower than in January 2024.

	Indoor events	Outdoor events	Museums/galleries
At least once a month	17% ▼ 3 points*	11% ▼ 3 points	9% ▼ 1 point
Every 2-3 months	27% ▼ 6 points	17% ▼ 8 points	19% -
Once every 6 months or less	45% ▲ 6 points	62% ▲ 8 points	59% ▼ 3 points

*Comparison done between this wave of data (May 2024) and previous wave (January 2024).

Thank You

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