

Nearly two thirds of culture-goers say attending arts and cultural events has a positive or a somewhat positive on their sense of belonging to Canada.

National Survey | Summary

Conducted by Nanos for Business / Arts and the NAC

Field: July 29th to August 1st, 2024

Submission 2024-2647

Business / Arts



NATIONAL ARTS CENTRE
CENTRE NATIONAL DES ARTS
Canada is our stage. Le Canada en scène.





The Arts Response Tracking Study is a regular monitor of the environment in the arts and culture sector.

The study focuses on culture-goers who have attended an indoor cultural gathering, an outdoor cultural gathering or a gallery or museum in the past three years.

This wave of research gauged the opinions among Canadian culture-goers on their expected frequency of attendance to art and culture performances in the upcoming year as well as expectations for arts and culture experiences, barriers, emotions, preferred types of venues for attendance, and the impact of attending arts and cultural events on sense of belonging to Canada.

Nanos conducted an RDD dual frame (land and cell-lines) hybrid telephone and online random survey of 1,035 Canadians, 18 years of age or older, between July 29th and August 1st, 2024 as part of an omnibus survey. The margin of error for a random survey of 1,035 Canadians is ± 3.1 percentage points, 19 times out of 20.

The study was sponsored by Business / Arts and the National Arts Centre, the Founding Arts Partner for this project.

KEY FINDINGS

1

IMPACT OF ARTS AND CULTURE ON SENSE OF BELONGING TO CANADA

Close to two in three culture-goers say that attending arts and cultural events has a positive (30%) or somewhat positive (33%) impact on their sense of belonging to Canada, and just under one in three think it has no impact (30%). Under one in ten say it has a negative or somewhat negative impact (2% each). Culture-goers from Quebec are more likely to say that attending arts and culture events has impact on their sense of belonging to Canada (39%) than culture-goers from the Atlantic region (22%).

4

ART AND CULTURAL ORGANISATIONS WELCOMING A DIVERSITY OF CANADIANS

Culture-goers are most likely to say that arts and cultural institutions in Canada are doing a very good (13%) or good (34%) job in creating experiences that are welcoming to a diversity of Canadians, while one in three say these institutions are doing an average (34%) job at this. This is on par with the previous wave in May 2023 (10%, 33% and 34% respectively). Less than one in ten report a poor or very poor job (5% and 2% respectively).

2

MOTIVATORS FOR ATTENDING ARTS AND CULTURAL EVENTS

Asked to rank the most important benefits that motivate them to attend arts or cultural events, culture-goers most frequently rank first socializing with friends or family (18%) and learning new things (18%) which is consistent with the previous wave in January 2024 (16% and 15% respectively). This was followed by a change of scene or escape from everyday life and relaxing and destressing (14%, each).

5

PREFERRED VENUES FOR ATTENDING ARTS AND CULTURAL EVENTS

One fifth of culture-goers say that they prefer large performance venues and local theatres (20%, each) as the type of venue for attending arts and cultural events. This was closely followed by outdoor spaces (18%) and galleries and museums (14%). Under one in ten preferred bars and nights clubs (5%) and community centres (4%). Nearly one in four younger culture-goers say they prefer outdoor spaces (23% for those 18 to 34).

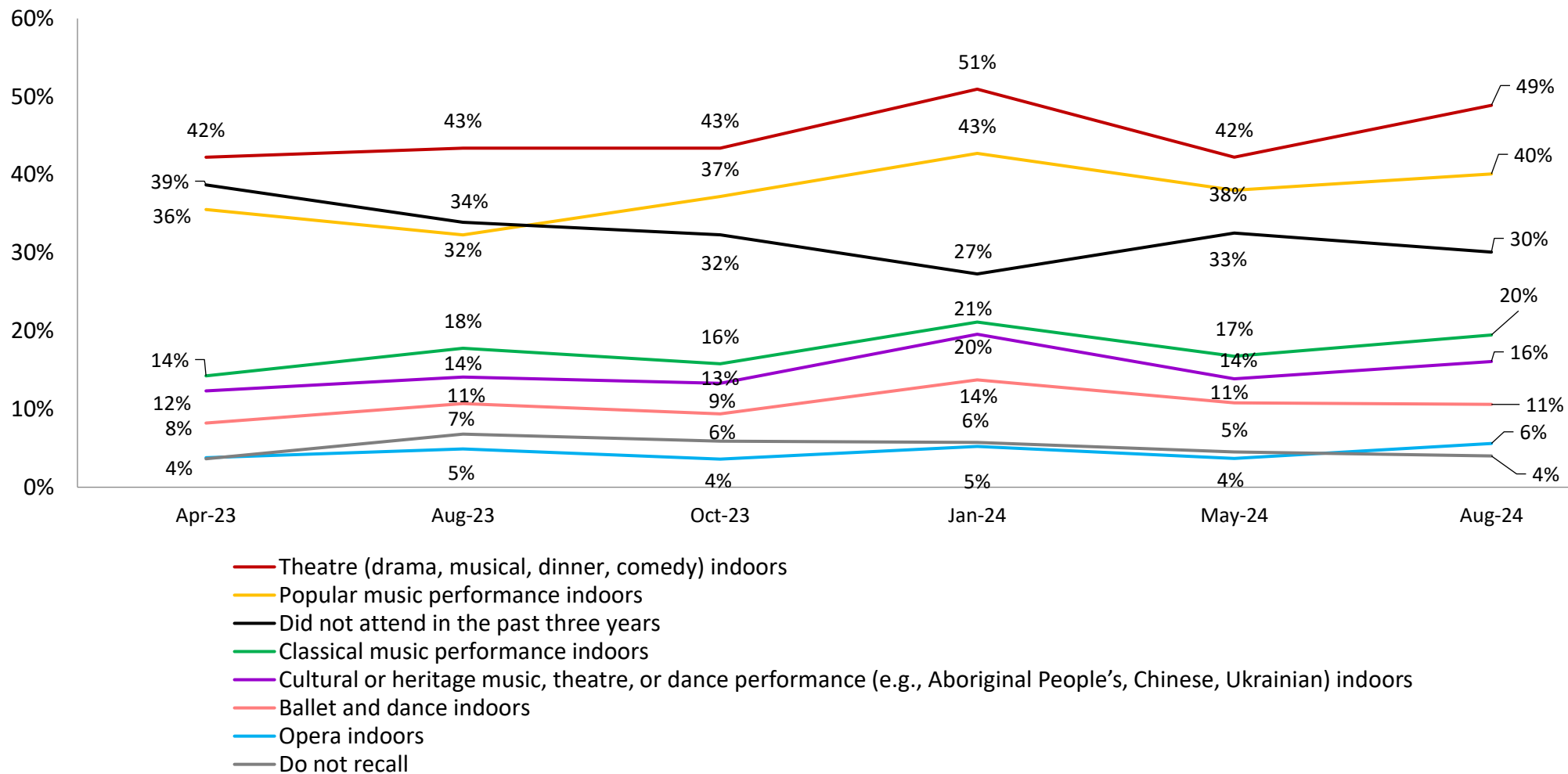
3

BARRIERS TO ATTENDING ARTS AND CULTURAL EVENTS

Culture-goers overall rank first the location of event being too far (35%) when asked to rank the top barriers to attending arts and cultural events. This was followed by standing in lines from just over a fifth of culture-goers (21%) and a little over one in ten stated none of the above (12%). Compared to the last wave in January 2024, the frequency of those who said standing in lines has almost doubled (12% in January 2024, 21% in August 2024). This was closely followed by not knowing if they would enjoy the event (11%). Less than one in 20 (3%) culture-goers say that not feeling like they belong is a barrier to attending these events.

Attendance at indoor cultural gatherings – All Canadians

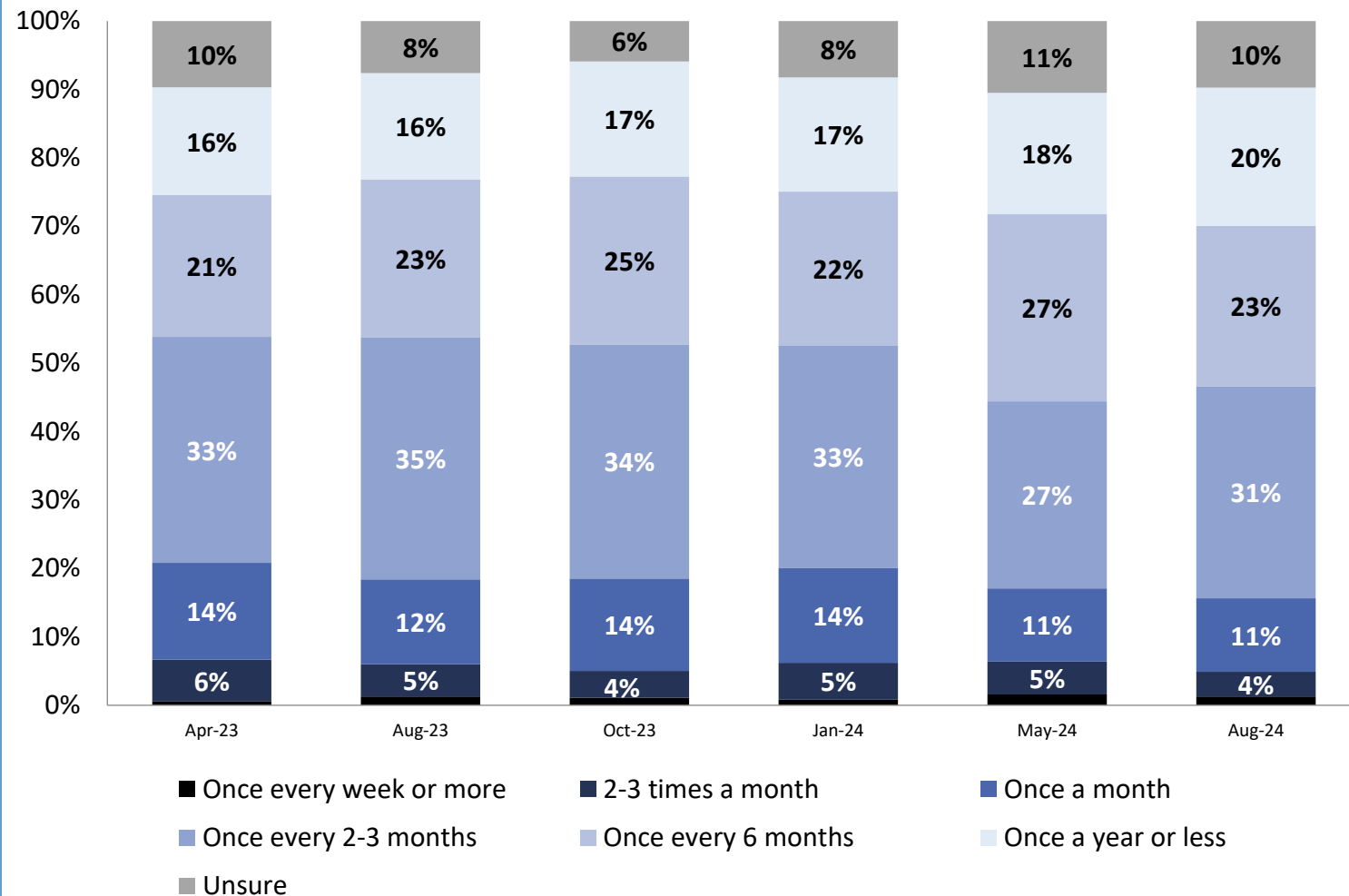
Q – Did you attend any of the following INDOOR cultural gatherings in the past three years? [RANDOMIZE](select all that apply)



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1,035 Canadians, accurate 3.1 percentage points plus or minus, 19 times out of 20.

The frequency of planned attendance has remained consistent with the last wave conducted in May 2024 with over a third of indoor culture-goers (31%) who say they will attend indoor events once every 2-3 months (27% in May 2024). Older indoor culture-goers (55 plus) are more likely to attend an indoor arts or cultural performance once every 2-3 months in the next 12 months (35%) than younger indoor culture-goers (18 to 34) (25%).

Frequency of planned attendance – Indoor events – Indoor culture-goers - Tracking



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=678 indoor culture-goers, accurate 3.8 percentage points plus or minus, 19 times out of 20.

Frequency of planned attendance – Indoor events – Indoor culture-goers - Demographics

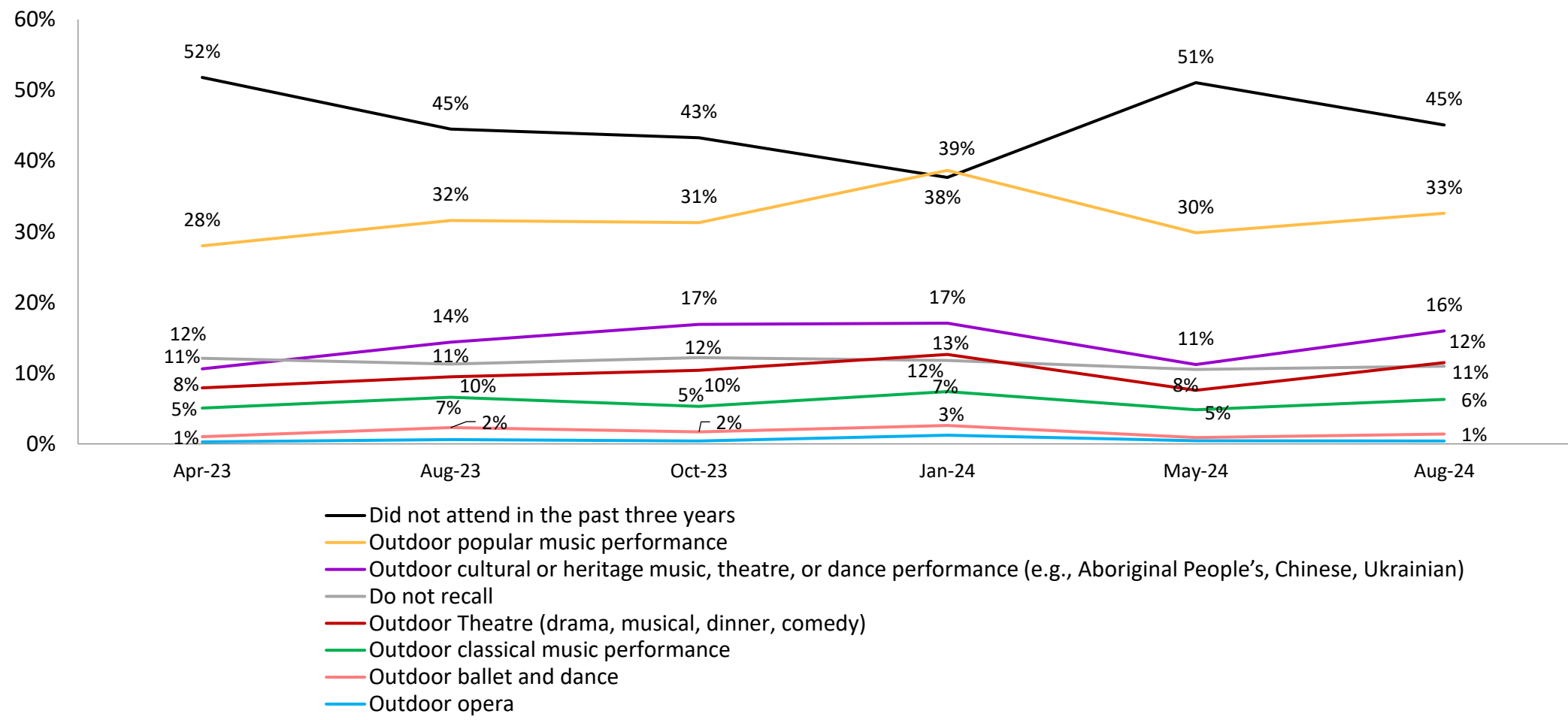
Q – How often do you plan on attending an INDOOR arts or cultural performance in the next 12 months?

	Indoor culture-goers (n=678)	Atlantic (n=53)	Quebec (n=149)	Ontario (n=237)	Prairies (n=140)	BC (n=99)	Men (n=343)	Women (n=335)	18 to 34 (n=111)	35 to 54 (n=237)	55 plus (n=330)
Once every week or more	1.3%	1.4%	1.3%	1.0%	3.2%	-	1.7%	1.0%	1.7%	2.1%	0.5%
2-3 times a month	3.6%	2.0%	6.2%	4.0%	0.3%	3.0%	4.0%	3.2%	6.2%	1.3%	3.7%
Once a month	10.7%	10.7%	8.2%	11.1%	3.6%	22.4%	8.7%	12.4%	9.9%	9.4%	12.2%
Once every 2-3 months	31.0%	38.7%	36.4%	25.5%	30.1%	36.1%	28.5%	33.3%	25.1%	31.0%	35.0%
Once every 6 months	23.4%	25.3%	22.6%	25.9%	24.0%	15.8%	26.1%	21.0%	25.4%	23.2%	22.2%
Once a year or less	20.2%	12.9%	17.2%	23.8%	22.9%	14.6%	21.9%	18.6%	24.3%	23.1%	15.2%
Unsure	9.7%	8.9%	8.1%	8.7%	15.9%	8.1%	9.0%	10.4%	7.4%	9.9%	11.2%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=678 indoor culture-goers, accurate 3.8 percentage points plus or minus, 19 times out of 20.

Attendance at outdoor cultural gatherings – All Canadians

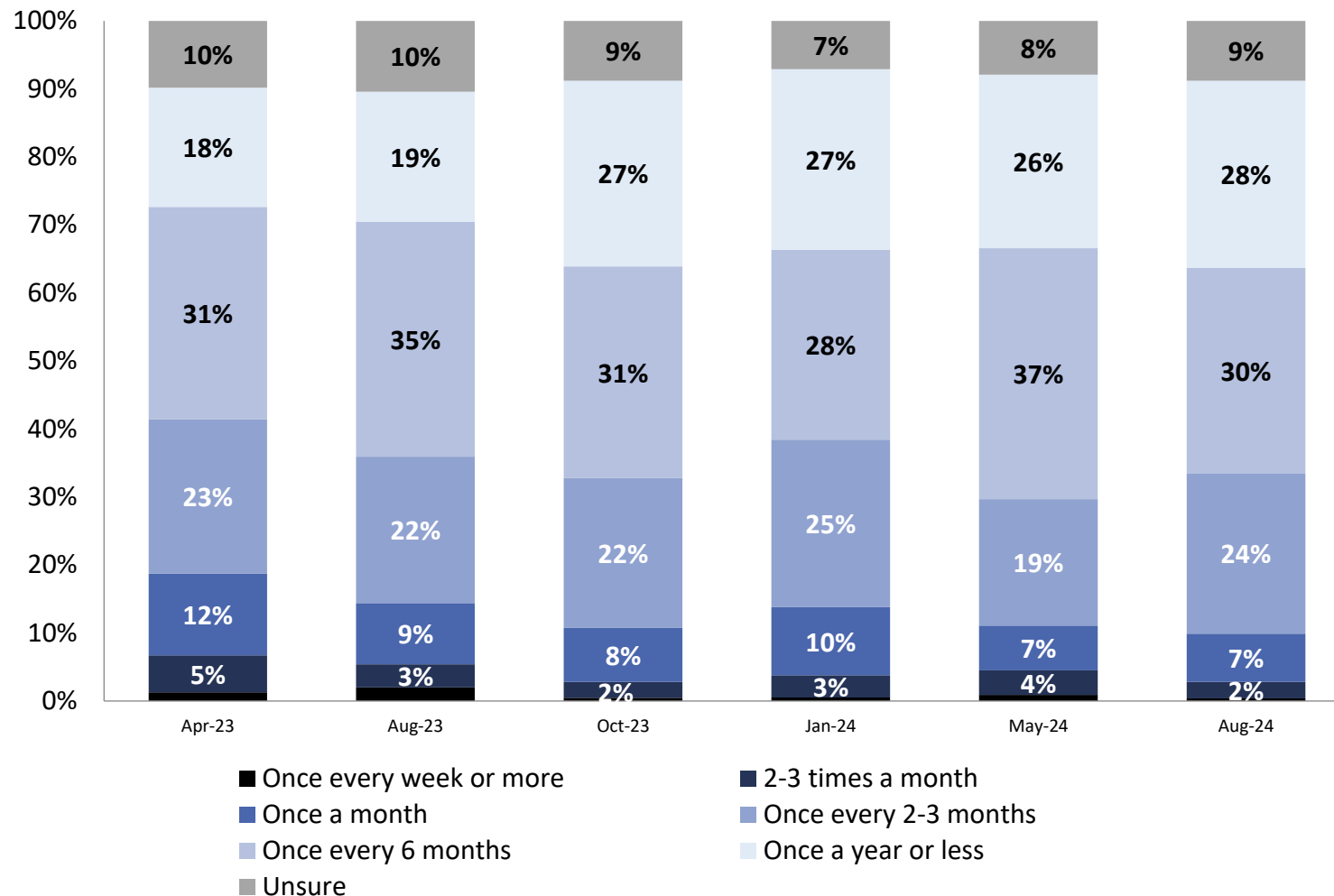
Q – Did you attend any of the following OUTDOOR cultural gatherings in the past three years? [RANDOMIZE](select all that apply)



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1,035 Canadians, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Frequency of planned attendance – Outdoor events – Outdoor culture-goers - Tracking

The frequency of planned attendance among outdoor culture-goers has remained consistent compared to the last wave conducted in May 2024 with now one third of outdoor culture-goers (34%) who say they will attend outdoor events at least once every 2-3 months (30% in May 2024). Less than one in ten (7%) say they will attend once a month, on par with the previous wave in May 2024 (7%).



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=450 outdoor culture-goers, accurate 4.7 percentage points plus or minus, 19 times out of 20.

Q – How often do you plan on attending an OUTDOOR ARTS OR CULTURAL PERFORMANCE in the next 12 months?

Frequency of planned attendance – Outdoor events – Outdoor culture-goers - Demographics

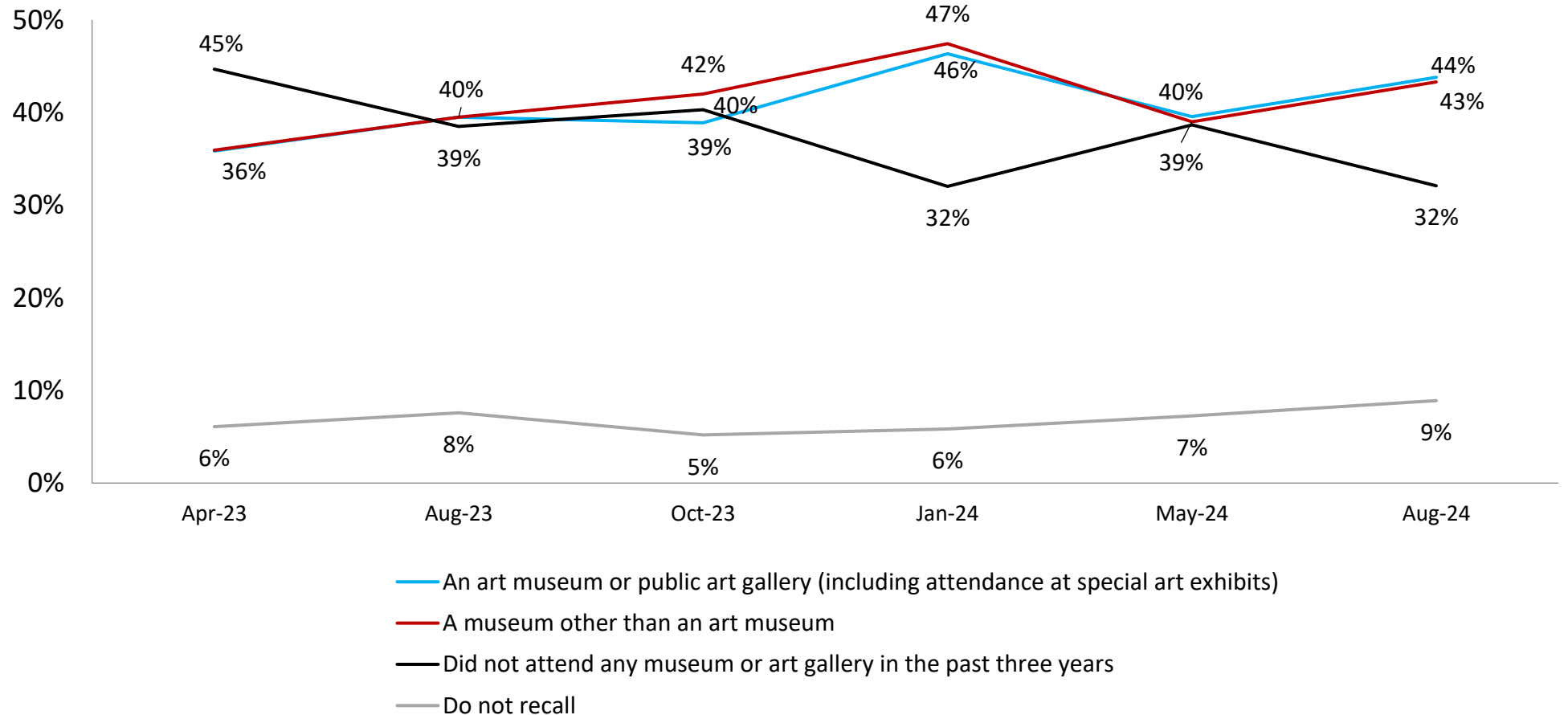
Q – How often do you plan on attending an OUTDOOR arts or cultural performance in the next 12 months?

	Outdoor culture-goers (n=450)	Atlantic (n=35)	Quebec (n=103)	Ontario (n=147)	Prairies (n=87)	BC (n=78)	Men (n=234)	Women (n=216)	18 to 34 (n=77)	35 to 54 (n=164)	55 plus (n=209)
Once every week or more	0.4%	-	1.8%	-	-	-	-	0.8%	0.9%	0.6%	-
2-3 times a month	2.4%	-	1.8%	2.3%	2.9%	3.7%	2.2%	2.5%	5.3%	1.3%	1.3%
Once a month	7.1%	7.1%	9.2%	6.8%	1.4%	10.5%	9.3%	5.0%	13.1%	6.9%	3.1%
Once every 2-3 months	23.6%	22.8%	17.6%	26.5%	17.4%	31.6%	20.4%	26.7%	25.5%	20.5%	24.9%
Once every 6 months	30.2%	29.3%	43.1%	24.3%	33.8%	22.0%	29.2%	31.1%	25.3%	28.6%	34.9%
Once a year or less	27.5%	32.4%	20.4%	31.6%	33.1%	20.9%	30.5%	24.7%	25.4%	31.9%	25.2%
Unsure	8.8%	8.3%	6.0%	8.5%	11.3%	11.4%	8.4%	9.2%	4.4%	10.3%	10.6%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=450 outdoor culture-goers, accurate 4.7 percentage points plus or minus, 19 times out of 20.

Attendance at art museum/gallery – All Canadians

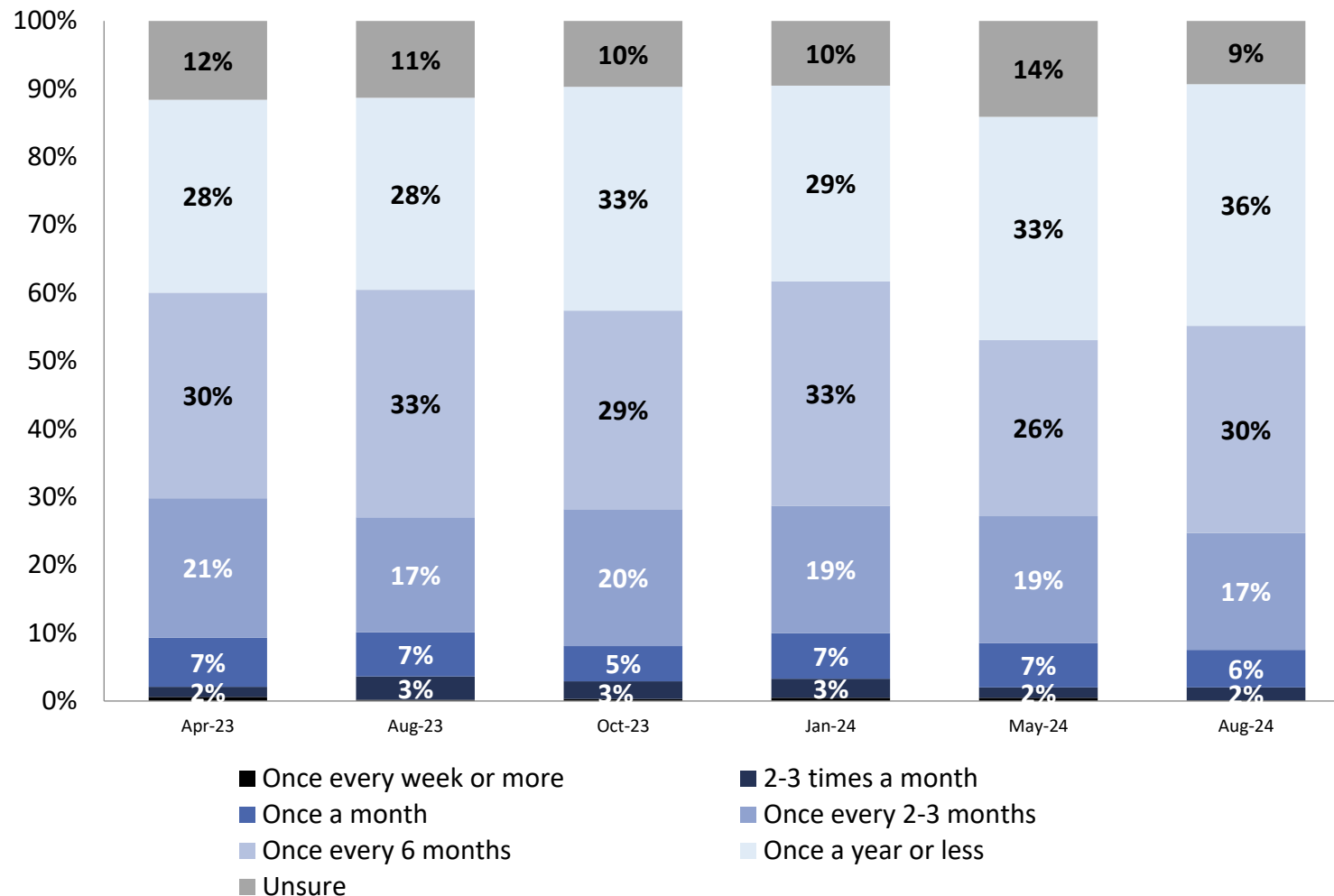
Q – Did you attend any of the following in the past three years? [RANDOMIZE] (select all that apply)



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1,035 Canadians, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Frequency of planned attendance – Art Gallery/Museum-goers - Tracking

Among art gallery/museum-goers, the frequency of planned attendance has remained consistent compared to the last wave conducted in May 2024 with under one fifth of art gallery/museum-goers (17%) who say they will attend an art gallery/museum once every 2-3 months (19% in May 2024). Expected attendance is consistent for museum-goers who say they will attend once a month. (6% for current wave and 7% in May 2024).



*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=615 art gallery/museum-goers, accurate 4.0 percentage points plus or minus, 19 times out of 20.

Q – How often do you plan on attending an ART GALLERY OR MUSEUM in the next 12 months?

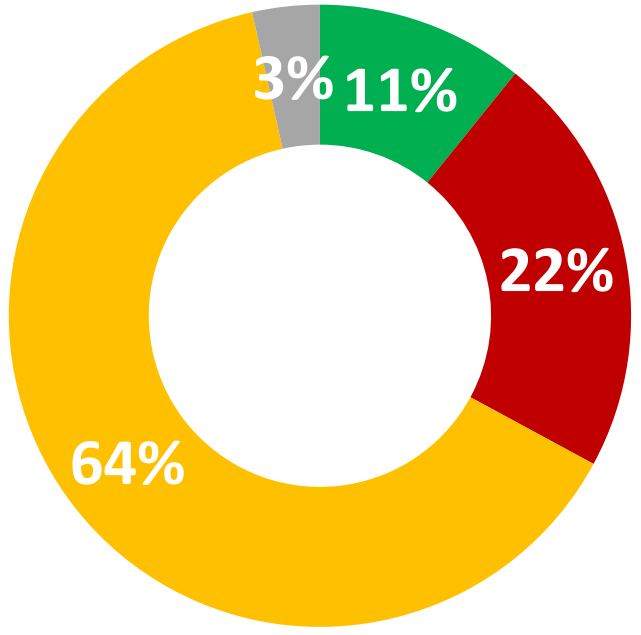
Frequency of planned attendance – Art Gallery/Museum – Museum-goers - Demographics

Q – How often do you plan on attending an ART GALLERY OR MUSEUM in the next 12 months?

Art gallery/ Museum- goers (n=615)	Atlantic (n=50)	Quebec (n=122)	Ontario (n=213)	Prairies (n=122)	BC (n=108)	Men (n=312)	Women (n=303)	18 to 34 (n=101)	35 to 54 (n=202)	55 plus (n=312)
Once every week of more	0.1%	1.6%	-	-	-	-	0.2%	-	0.4%	-
2-3 times a month	1.9%	6.0%	0.7%	2.0%	1.7%	2.0%	1.4%	2.4%	0.8%	1.9%
Once a month	5.5%	2.2%	7.4%	6.1%	3.3%	5.1%	4.8%	6.2%	4.2%	6.9%
Once every 2-3 months	17.2%	17.7%	18.4%	18.9%	7.3%	20.4%	16.3%	18.0%	17.1%	17.1%
Once every 6 months	30.4%	16.6%	36.3%	26.7%	31.4%	36.8%	33.9%	27.2%	33.4%	28.3%
Once a year or less	35.5%	47.7%	29.8%	37.8%	42.9%	25.4%	35.9%	35.2%	37.9%	33.8%
Unsure	9.3%	8.3%	7.5%	8.5%	13.4%	10.2%	7.7%	10.7%	6.6%	12.0%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=615 art gallery/museum-goers, accurate 4.0 percentage points plus or minus, 19 times out of 20.

Time attending arts and cultural performances



- More time
- Less time
- About the same amount of time
- Unsure

	Atlantic (n=63)	Quebec (n=181)	Ontario (n=284)	Prairies (n=171)	BC (n=127)
About the same amount of time	65.8%	71.0%	58.7%	66.1%	61.4%
	Men (n=434)	Women (n=392)	18 to 34 (n=131)	35 to 54 (n=286)	55 plus (n=409)
Less time	21.1%	16.7%	25.6%	21.8%	22.0%
	20.1%	24.1%	16.2%	23.5%	24.7%

*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

Q – Compared to a year ago, are you spending more time, less time or about the same amount of time attending arts and cultural performances?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=826 culture-goers, accurate 3.4 percentage points plus or minus, 19 times out of 20.

Preferred venues for attending arts and cultural events

Q – Please rank the following venues in order of preference, where 1 is the type of venue you most prefer when attending arts and cultural events, 2 the second most preferred and 3 the third most. [RANDOMIZE]

	Rank 1 (n=804)	Rank 2 (n=744)	Rank 3 (n=675)	
Top mentions	Large performance venues such as Place des Arts, Massey Hall and the National Arts Centre	20.2%	14.2%	12.8%
	Local theatres	19.5%	21.1%	16.1%
	Outdoor spaces	17.5%	17.8%	18.3%
	Galleries and museums	14.2%	17.0%	15.5%
	Stadiums an arenas	12.6%	14.3%	14.5%
	Bars and night clubs	5.4%	7.7%	8.3%
	Community centres	4.2%	7.8%	14.5%
	None/I do not attend arts and culture performances	3.7%	-	-
	Unsure	1.4%	-	-
	Other	0.1%	-	-

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=804 culture-goers, accurate 3.5 percentage points plus or minus, 19 times out of 20.



Expected benefits of attending arts and cultural events

Q – What do you want to get out of the experience of attending arts and cultural events, where 1 is the most important benefit that motivates you to attend and 2 the second most important. [RANDOMIZE]

Top mentions		Rank 1		Rank 2	
		2024-08 (n=807)	2024-01 (n=896)	2024-08 (n=741)	2024-01 (n=834)
		Socializing with friends or family	17.8%	15.0%	16.2%
Learning new things	17.6%	19.8%	14.5%	15.0%	
A change of scene/escape from the everyday	13.8%	19.2%	19.4%	18.3%	
Relaxing, de-stressing or relieving anxiety	14.2%	13.0%	13.2%	13.7%	
Indulging, pampering or treating yourself	11.0%	11.3%	10.7%	8.9%	
Having a date night	9.7%	7.2%	8.5%	8.8%	
Celebrating and reconnecting with your heritage and culture	6.0%	7.0%	6.5%	8.4%	
Meeting new people and connecting with others in the community	3.0%	3.6%	7.0%	6.3%	
Unsure	2.9%	0.9%	-	-	
Feeling a sense of belonging	2.3%	-	3.4%	-	
Other	0.1%	2.9%	-	1.0%	

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=807 culture-goers, accurate 3.5 percentage points plus or minus, 19 times out of 20.

Barriers to attendance

Q – Please rank the following potential barriers to attending live arts and cultural events that would likely stop you from attending an event **that interests you and that you could afford**, where 1 is the most likely to stop you from attending and 2 the second most likely. [RANDOMIZE]

	Rank 1		Rank 2	
	2024-08 (n=811)	2024-01 (n=891)	2024-08 (n=512)	2024-01 (n=521)
Location is too far	35.2%	33.1%	25.4%	24.2%
Standing in lines	21.1%	12.2%	22.4%	19.8%
None of the above	11.9%	20.0%	-	5.5%
Not knowing if I will enjoy it	11.2%	12.0%	17.7%	21.1%
Lack of childcare	3.1%	4.8%	2.4%	3.8%
Not feeling like I belong*	3.0%	N/A	8.0%	N/A
Not knowing how long it will be and/or if there will be breaks	2.1%	2.0%	8.7%	7.2%
Unsure	1.8%	1.7%	-	-
Not being able to bring my kid	1.3%	2.5%	1.0%	5.2%
Not understanding etiquette /rules for attendance	1.1%	1.0%	2.1%	3.1%

TOP RESPONSES

*Not feeling like I belong is a new response option added on this wave.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=811 culture-goers, accurate 3.4 percentage points plus or minus, 19 times out of 20.

Improving the appeal of the arts and culture sector

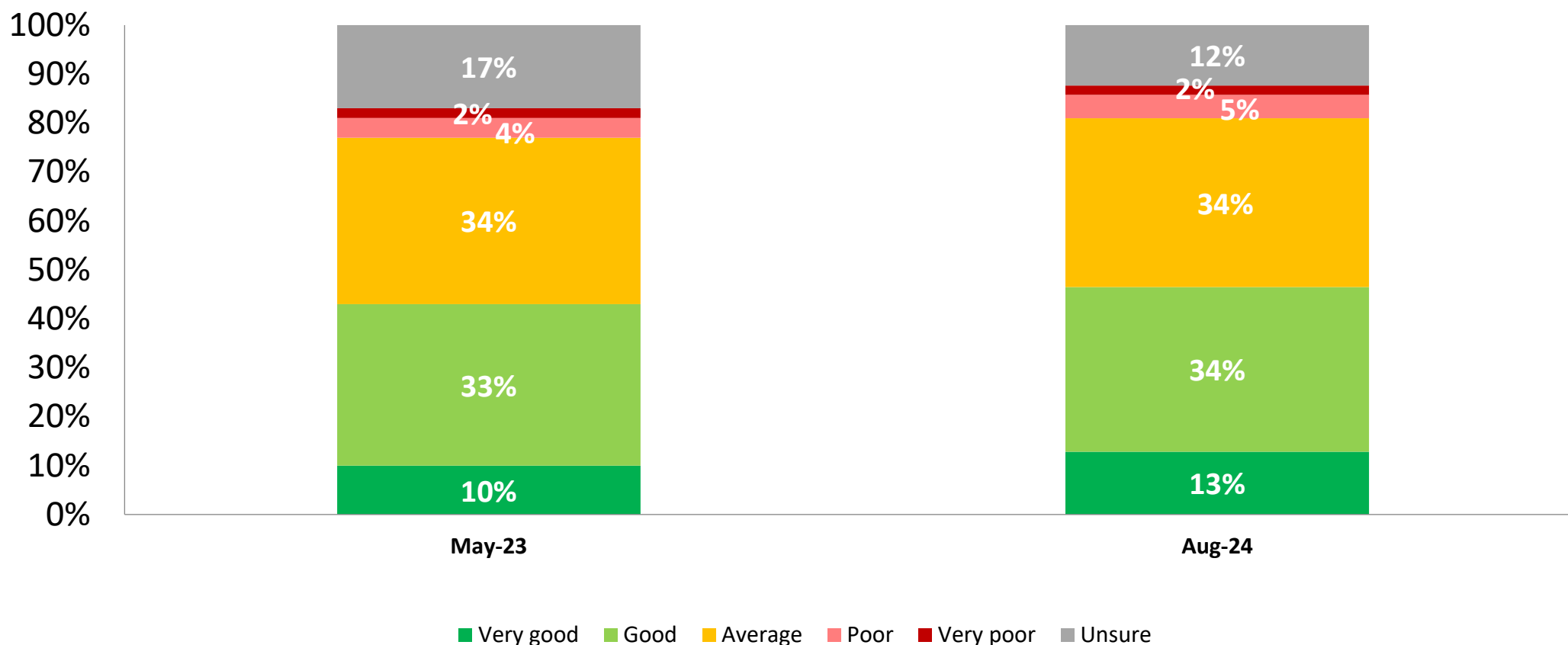
Q – What is one thing you would like to see the arts and culture sector do to appeal more to you? [OPEN]

		Frequency	
		2024-08 (n=576)	2023-04 (n=540)
TOP RESPONSES	Affordability/free events	23.4%	21.6%
	Unsure	9.2%	14.3%
	Nothing	7.3%	3.4%
	Having to travel less/more events closer to me/rural areas	7.2%	8.9%
	Advertise/more awareness of events	5.1%	4.7%
	More variety	4.6%	5.0%
	Doing fine/satisfied already	3.8%	3.7%
	Smaller events/fewer people	2.9%	0.2%
	Inclusiveness	2.9%	2.3%
	Remove politics for the arts/culture, less "woke"	2.8%	3.4%
	Support local artists/artisan work	2.6%	1.8%
	Accessibility for individuals with reduced mobility/hearing loss	2.4%	-

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=576 culture-goers, accurate 4.1 percentage points plus or minus, 19 times out of 20, respectively.

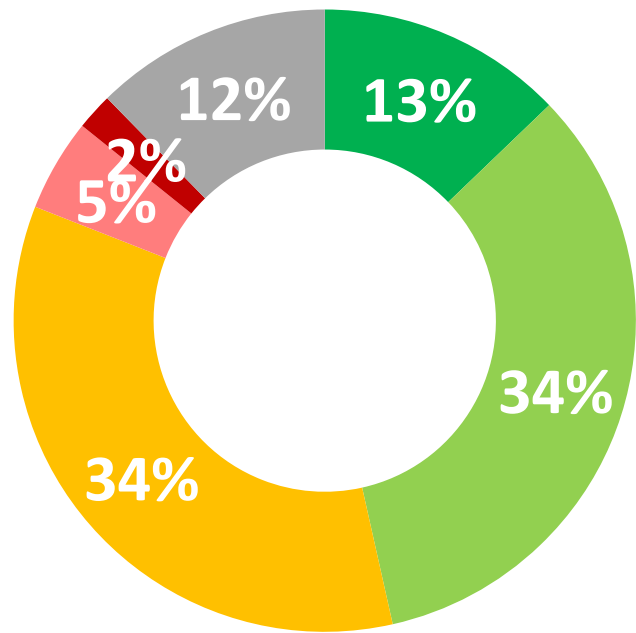
Job of art and cultural institutions welcoming a diversity of Canadians - Tracking

Q – Do you think arts and cultural institutions in Canada are doing a very good, good, average, poor or very poor job at creating experiences that are welcoming to a diversity of Canadians?



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=826 culture-goers, accurate 3.4 percentage points plus or minus, 19 times out of 20.

Job of art and cultural institutions welcoming a diversity of Canadians - by demographics



■ Very good ■ Good ■ Average
■ Poor ■ Very Poor ■ Unsure

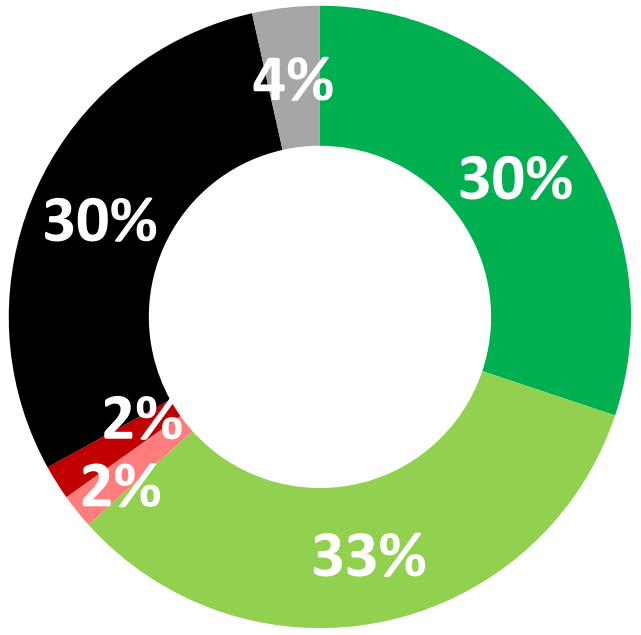
*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

	Atlantic (n=63)	Quebec (n=181)	Ontario (n=284)	Prairies (n=171)	BC (n=127)
Very good/Good	36.6%	64.0%	41.8%	37.2%	46.9%
	Men (n=434)	Women (n=392)	18 to 34 (n=131)	35 to 54 (n=286)	55 plus (n=409)
Average	43.1%	49.6%	46.6%	47.8%	45.4%
	Atlantic (n=63)	Quebec (n=181)	Ontario (n=284)	Prairies (n=171)	BC (n=127)
Average	42.2%	22.9%	37.4%	40.0%	34.4%
	Men (n=434)	Women (n=392)	18 to 34 (n=131)	35 to 54 (n=286)	55 plus (n=409)
Average	35.9%	33.1%	38.2%	31.3%	34.5%

Q – Do you think arts and cultural institutions in Canada are doing a very good, good, average, poor or very poor job at creating experiences that are welcoming to a diversity of Canadians?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=826 culture-goers, accurate 3.4 percentage points plus or minus, 19 times out of 20, respectively.

Arts and cultural events impacting sense of belonging to Canada



- Positive
- Somewhat positive
- Somewhat negative
- Negative
- No impact
- Unsure

	Atlantic (n=63)	Quebec (n=181)	Ontario (n=284)	Prairies (n=171)	BC (n=127)
Positive/Somewhat positive	68.3%	58.8%	63.0%	64.3%	68.1%
	Men (n=434)	Women (n=392)	18 to 34 (n=131)	35 to 54 (n=286)	55 plus (n=409)
No impact	22.4%	39.2%	29.6%	24.1%	23.7%
	Men (n=434)	Women (n=392)	18 to 34 (n=131)	35 to 54 (n=286)	55 plus (n=409)
	31.6%	27.6%	30.3%	30.8%	28.1%

*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

Q – Does attending arts and cultural events have a positive, a somewhat positive, a somewhat negative, a negative or no impact on your sense of belonging to Canada?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=826 culture-goers, accurate 3.4 percentage points plus or minus, 19 times out of 20.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,035 Canadians, 18 years of age or older, between July 29th and August 1st, 2024 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,035 Canadians is ± 3.1 percentage points, 19 times out of 20.

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

Note: Charts may not add up to 100 due to rounding.



Element	Description	Element	Description
Research sponsor	Business / Arts and the National Arts Centre	Weighting of Data	The results were weighted by age and gender using the latest Census information (2021) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure.
Population and Final Sample Size	1,035 Randomly selected individuals.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Source of Sample	Nanos Probability Panel	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not participate.
Type of Sample	Probability	Stratification	By age and gender using the latest Census information (2021) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Estimated Response Rate	Nine percent, consistent with industry norms.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Question Content	Topics on the omnibus ahead of the survey content included: views on political issues, views on economic issues, the environment and energy.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six-digit postal code was used to validate geography.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online	Research/Data Collection Supplier	Nanos Research
Number of Calls	Maximum of five call backs to those recruited.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com .
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Data Tables	By region, age and gender: Excel Tables
Field Dates	July 29 th to August 1 st , 2024.		
Language of Survey	The survey was conducted in both English and French.		
Standards	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. https://canadianresearchinsightscouncil.ca/standards/		



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Any questions?



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