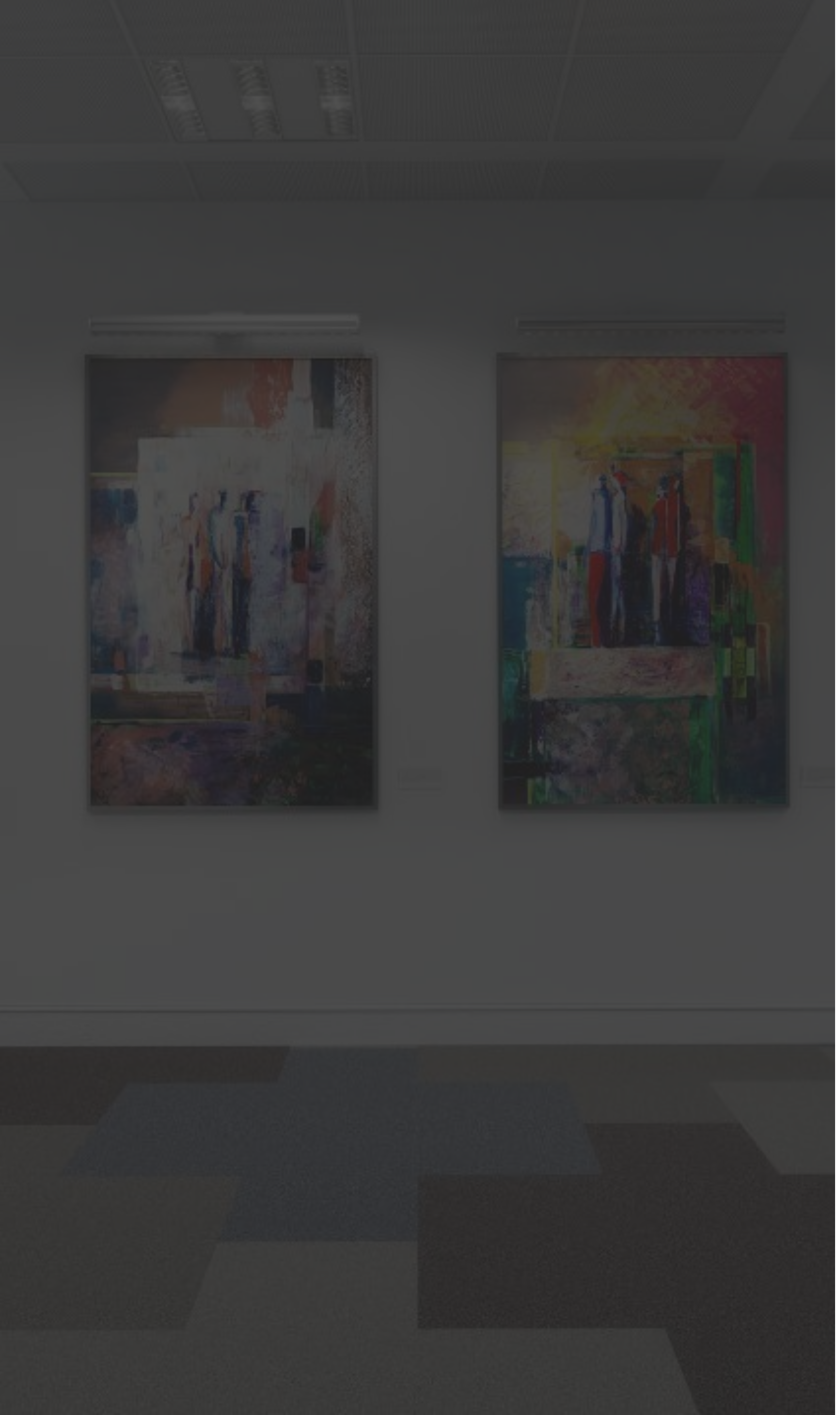
A strong majority of culture-goers who attended an exhibit or performance for the first time say it was a positive experience.

National Survey | Summary
Conducted by Nanos for Business / Arts and the NAC, January 2025
Field: December 30th, 2024 to January 5th, 2025
Submission 2024-2761

Business / Arts

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

NANOS



Summary

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, spending on arts and culture, and views on new experiences.

Nanos conducted an RDD dual frame (land and cell-lines) hybrid telephone and online random survey of 1,045 Canadians, 18 years of age or older, between December 30th, 2024, to January 5th, 2025, as part of an omnibus survey. The margin of error for a random survey of 1,045 Canadians is ±3.0 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.

In the past year, **half** of culture-goers report attending an exhibit or performance at a cultural organization for the first time, where they didn't have previous familiarity or experience with that cultural organization. Most said their experience was positive.

Frequency of attending exhibits or performances at a cultural organization for the first time

50%	50%
Once or more	Zero

First experience attending an exhibit or performance at a cultural organization

66%	Positive
28%	Somewhat positive
1%	Somewhat negative
0%	Negative
4%	Unsure

Expected frequency of attendance in next 12 months for culture-goers – January 2025

	Indoor events	Outdoor events	Museums/galleries
At least once a month	17% ▲ 1 point	10% ▲ 2 points	9% ▲ 2 points
Every 2-3 months	32% ▲ 2 points	23% ▲ 6 points	19% ▲ 1 point
Once every 6 months or less	45% ▼ 2 points	61% ▼ 3 points	63% ▼ 1 points
Unsure	5% ▼ 1 point	6% ▼ 4 points	9% ▼ 2 points

*Comparison done between this wave of data (January 2025) and previous wave (November 2024).

Spending on arts and cultural events in 2025

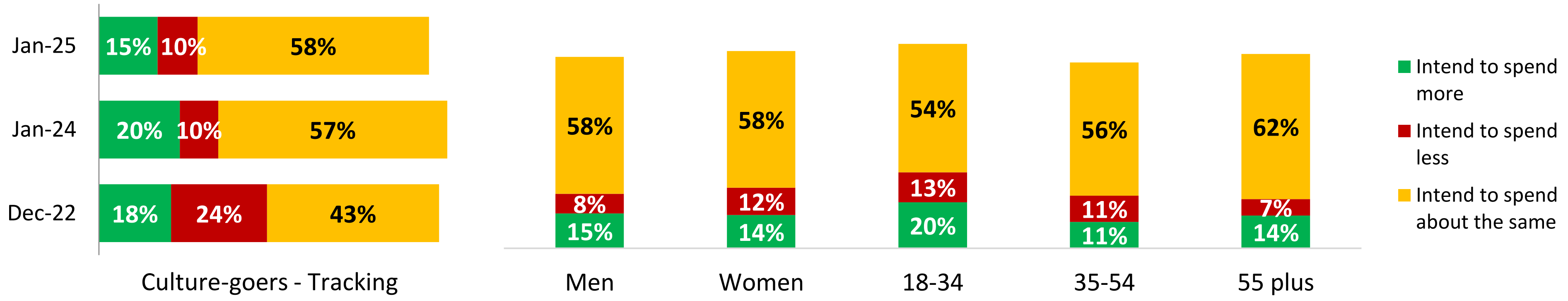
Overall, the median amount culture-goers plan to spend on arts and cultural events remains the same compared to 2024.

Culture-goers aged 18 to 34 are marginally more likely to say they plan on spending more this year than culture-goers aged 35 to 54.

Expected 2025 budget for arts and cultural events among culture-goers who report spending on these events

	Culture-goers		Men		Women		18-34		35-54		55 plus	
	2025	2024	**2025**	2024	**2025**	2024	**2025**	2024	**2025**	2024	**2025**	2024
Mean	**$1028**	$1376	**$1011**	$1480	**$1037**	$1278	**$1157**	$1489	**$1013**	$1501	**$937**	$1202
Median	**$500**	$500	**$500**	$500	**$500**	$500	**$500**	$500	**$500**	$500	**$500**	$500

Intentions to spend on arts and culture in 2025



Areas where culture-goers spend most of their annual budget for leisure and entertainment

33% Travelling
(34% in 2024)

25% Dining out, restaurants and/or nightlife
(20% in 2024)

9% Subscriptions to streaming services
(12% in 2024)

8% Hobbies
(8% in 2024)

7% Attending indoor performing arts venues
(8% in 2024)

2% Attending outdoor music festivals
(2% in 2024)

Q – Thinking about your total personal annual budget for leisure and entertainment activities, please rank the top three areas where you spend most of your budget, where 1 is the area you spend the most on, 2 the area you spend the second most and 3 the third most: [RANDOMIZE]

Sources of information

Just under two in three culture-goers searched online to learn about arts and cultural events. Younger culture-goers are more likely to learn about arts and culture events through social media, while older culture-goers are more likely to do so through emails and newsletters.

64%
Searching online

59%
Friends and family

58%
Social media
(74% for those 18-34)

40%
Emails/newsletter
(53% for those 55 plus)

Q – What sources do you go to in order to learn about arts and cultural events to attend? [RANDOMIZE] (Select all that apply)

Culture-goers personas – First-timers vs Regular Patrons

Regular Patrons
(46% of culture-goers)

Report not attending any new exhibit or performance at a cultural organization for the first time this past year

- Less likely to have completed University or graduate studies (52%).
- More likely be older (44% are 55 plus compared to 31% of regular patrons).
- Nearly one in five don’t expect to spend any money to attend arts and cultural events in 2025 (17%).
- As likely to say they will spend more (10%) or less (11%) in 2025 on arts and cultural performances.

First-timers
(54% of Culture-goers)

Report attending at least one new exhibit or performance at a cultural organization for the first time this past year

- Are more likely to have completed University or graduate studies (66%).
- More likely to be younger (36% are 18 to 34 compared to 25% of first-timers).
- More likely to prioritize spending on traveling (39% compared to 28% of first-timers).
- Twice as likely to say they will spend more (20%) rather than less (10%) in 2025 on arts and cultural performances.

KEY FINDINGS

1

HALF OF CULTURE-GOERS REPORT ATTENDING AN EXHIBIT OR PERFORMANCE AT A CULTURAL ORGANIZATION FOR THE FIRST TIME; WITH VAST MAJORITY REPORTING A POSITIVE EXPERIENCE

On average, culture-goers reported attending one exhibit or performance at a cultural organization for the first time in the past year, where they didn't have previous familiarity/experience with that cultural organization. Over nine in ten first time attendees to a new experience reported a positive (67%) or somewhat positive (28%) first experience. Only 1% reported a somewhat negative first experience and 4% were unsure.

2

FIRST TIMERS REPORT SATISFACTION WITH FIRST TIME EXPERIENCE; MORE ADVERTISEMENT COULD HAVE ENHANCED THEIR EXPERIENCE

Among culture-goers who report having attended a new experience for the first time in the past year, nearly one third report being satisfied and that no improvement are needed to enhance their experience (32%). The top suggestion for enhancing their first experience was having more advertisement and more details about the program (15%). This was followed by lower costs (6%) and better artists and entertainment (6%).

3

NEARLY THREE IN FIVE CULTURE-GOERS PLAN TO SPEND THE SAME AMOUNT ON LEISURE AND ENTERTAINMENT THIS YEAR COMPARED TO LAST YEAR

On average, culture-goers report that they expect to spend $1028 this year to attend arts and cultural events (median of $500) (mean of $1376, median of $500 in 2024). When asked to compare to the previous year, just under three in five culture-goers say they plan on spending about the same (58%), while over one in ten say they plan on spending more this year (15%; 20% in January 2024). A similar proportion say they plan on spending less (10%) compared to when this question was asked in January 2024.

4

TRAVELLING OR DINING OUT ARE THE AREAS THAT OVER HALF OF CULTURE-GOERS SPEND THE MOST ON IN TERMS OF THEIR ENTERTAINMENT AND LEISURE BUDGET

When asked to rank the top three areas where they spend most of their personal leisure and entertainment budget, about one third of culture-goers rank travelling (33%) first on their list, followed by dining out, which sits atop the list of one in four (25%) culture-goers. Just under one in ten culture-goers say the area they spend the most on is streaming services (9%). Likewise, 8% of culture-goers say the area they spend the most on is hobbies, including video games and arts and crafts. These results are all consistent with results from January 2024.

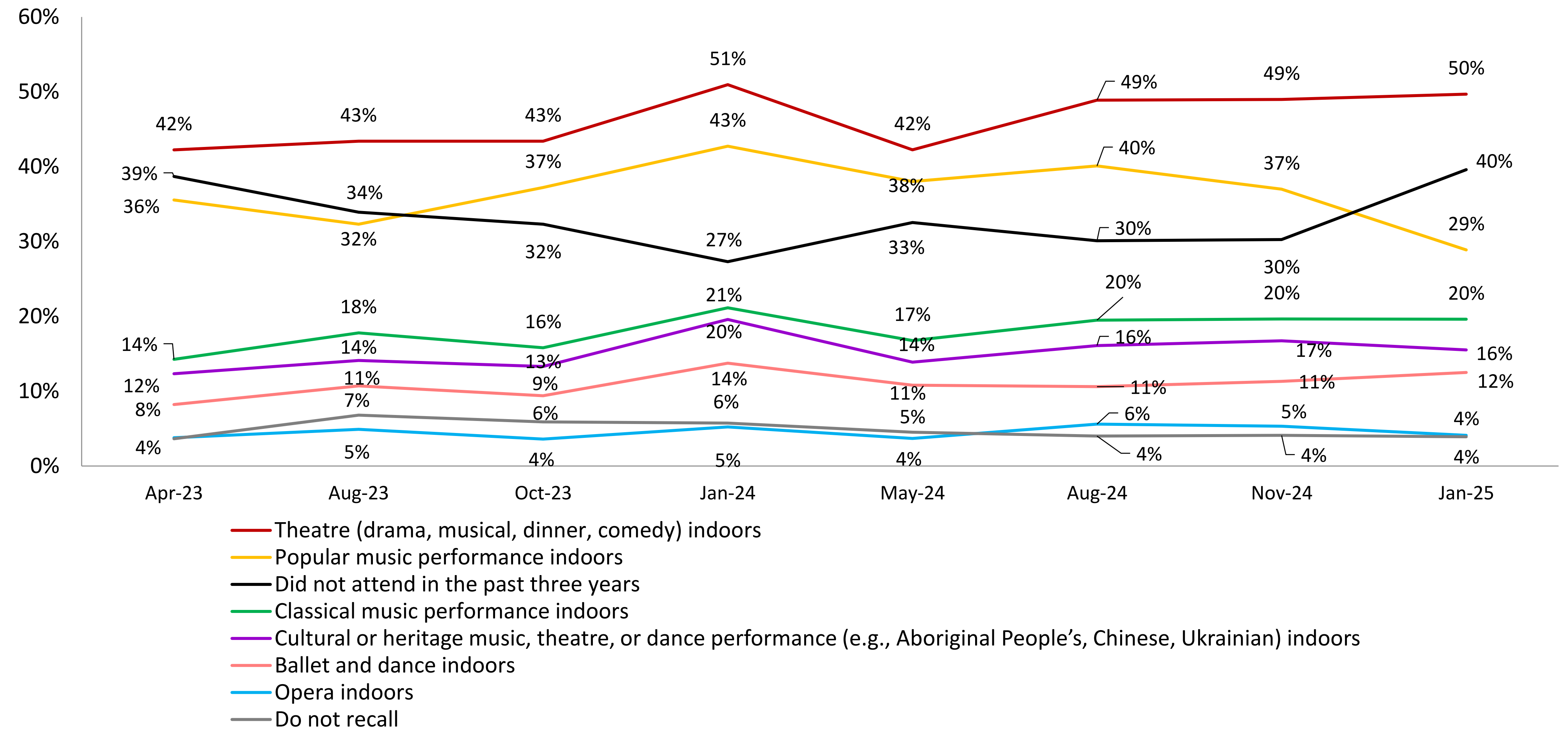
5

SEARCHING ONLINE REMAINS TOP SOURCE OF INFORMATION FOR CULTURE-GOERS COMPARED TO THE JANUARY 2024 WAVE

Searching online (64%) through friends and family (59%) and social media (58%) are the top sources of information for learning about new arts and cultural events for culture-goers overall. Culture-goers aged 18 to 34 (74%) are more likely than culture-goers aged 55 and over (44%) to lean on social media. Two in five culture-goers (40%) reported turning to emails/newsletters, with culture-goers aged 55 and over (53%) being more likely than culture-goers aged 18 to 34 (27%) to use this source to learn more about cultural events and performances.

Attendance at indoor cultural gatherings – All Canadians – Tracking

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



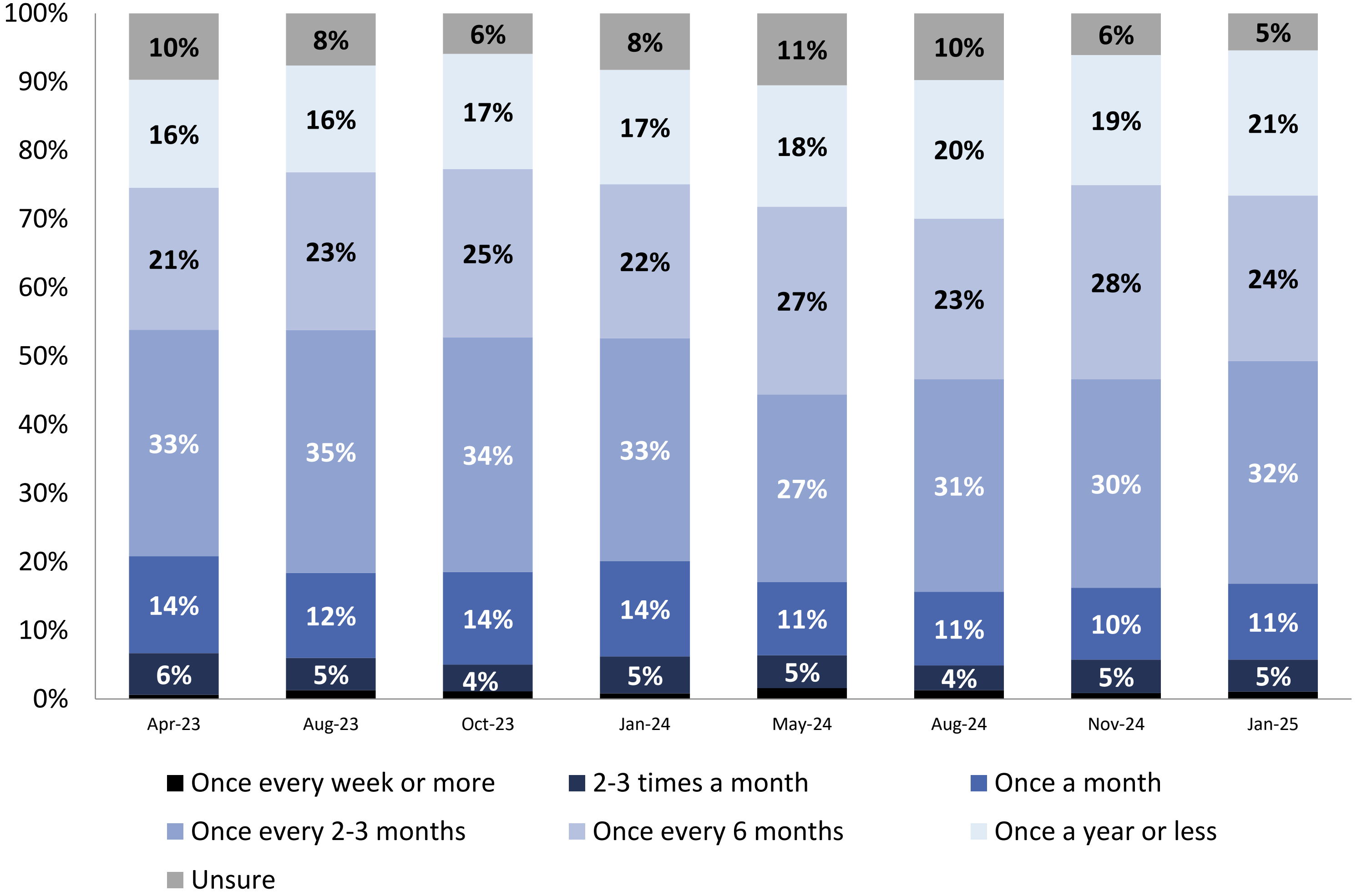
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th 2025, n=1045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Business/Arts NATIONAL ARTS CENTRE CENTRE NATIONAL DES ARTS NANOS

Around one in six culture-goers (17%) say they plan on attending indoor arts or cultural performances at least once a month in the next year, which remains consistent since the start of tracking in April 2023. Women are more likely to say this (20%) than men (13%). Consistent with the previous wave in November 2024, over one in two say they plan on attending either once every 2 to 3 months (32%) or once every 6 months (24%).

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

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, December 30th, 2024 to January 5th 2025, n=681 indoor culture-goers, accurate 3.8 percentage points plus or minus, 19 times out of 20.

Business/Arts NATIONAL ARTS CENTRE CENTRE NATIONAL DES ARTS NANOS

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

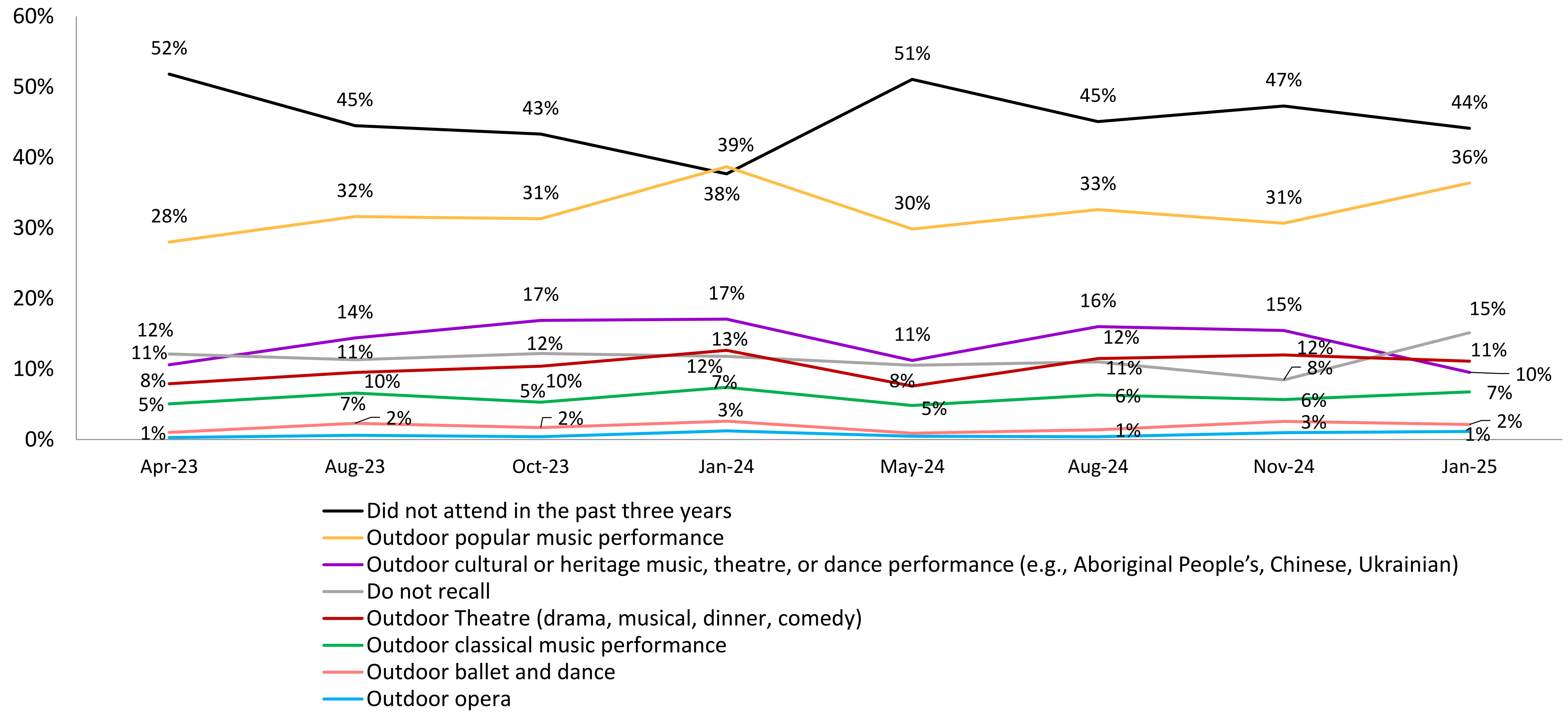
Q – How often do you plan on attending an INDOOR arts or cultural performance in the next 12 months?

	Indoor culture-goers (n=681)	Atlantic (n=67)	Quebec (n=154)	Ontario (n=205)	Prairies (n=139)	BC (n=116)	Men (n=351)	Women (n=328)	18 to 34 (n=95)	35 to 54 (n=253)	55 plus (n=333)
Once every week or more	1.1%	1.7%	-	1.5%	2.3%	-	0.3%	1.8%	1.4%	1.3%	0.7%
2-3 times a month	4.7%	4.8%	6.1%	3.2%	7.0%	3.4%	2.7%	6.5%	3.8%	5.5%	4.6%
Once a month	11.1%	6.0%	11.8%	11.9%	7.4%	14.3%	9.9%	11.9%	9.5%	7.3%	15.4%
Once every 2-3 months	32.5%	34.1%	37.0%	33.1%	25.7%	31.6%	34.7%	30.7%	32.5%	28.6%	35.8%
Once every 6 months	24.1%	26.5%	19.5%	28.0%	22.4%	22.2%	25.0%	23.4%	18.8%	31.3%	22.2%
Once a year or less	21.2%	22.3%	21.3%	17.2%	28.2%	22.1%	22.5%	19.9%	31.7%	18.0%	15.5%
Unsure	5.4%	4.7%	4.4%	5.0%	6.8%	6.4%	4.8%	5.9%	2.3%	8.0%	5.7%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=681 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)

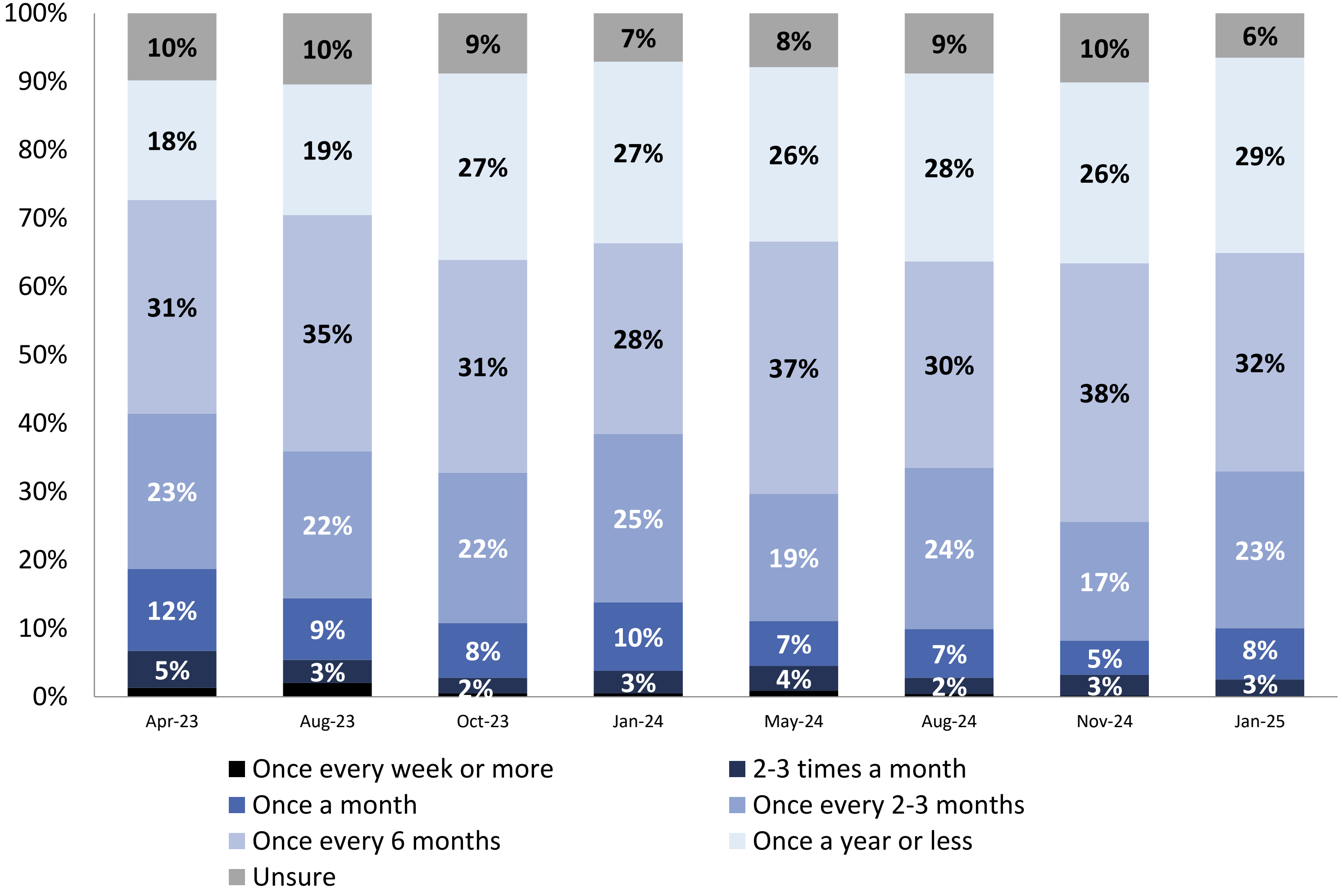


Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th 2025, n=1045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Around one in three outdoor culture-goers say they plan on attending outdoor arts or cultural performance in the next year at least once every couple months (34%), which is an eight per cent increase from the previous wave in November 2024 (26%). Nearly one in three say they plan on attending once every 6 months, which remains consistent with previous waves. Less than one in ten (8%) say they will attend once a month which is also similar to previous waves.

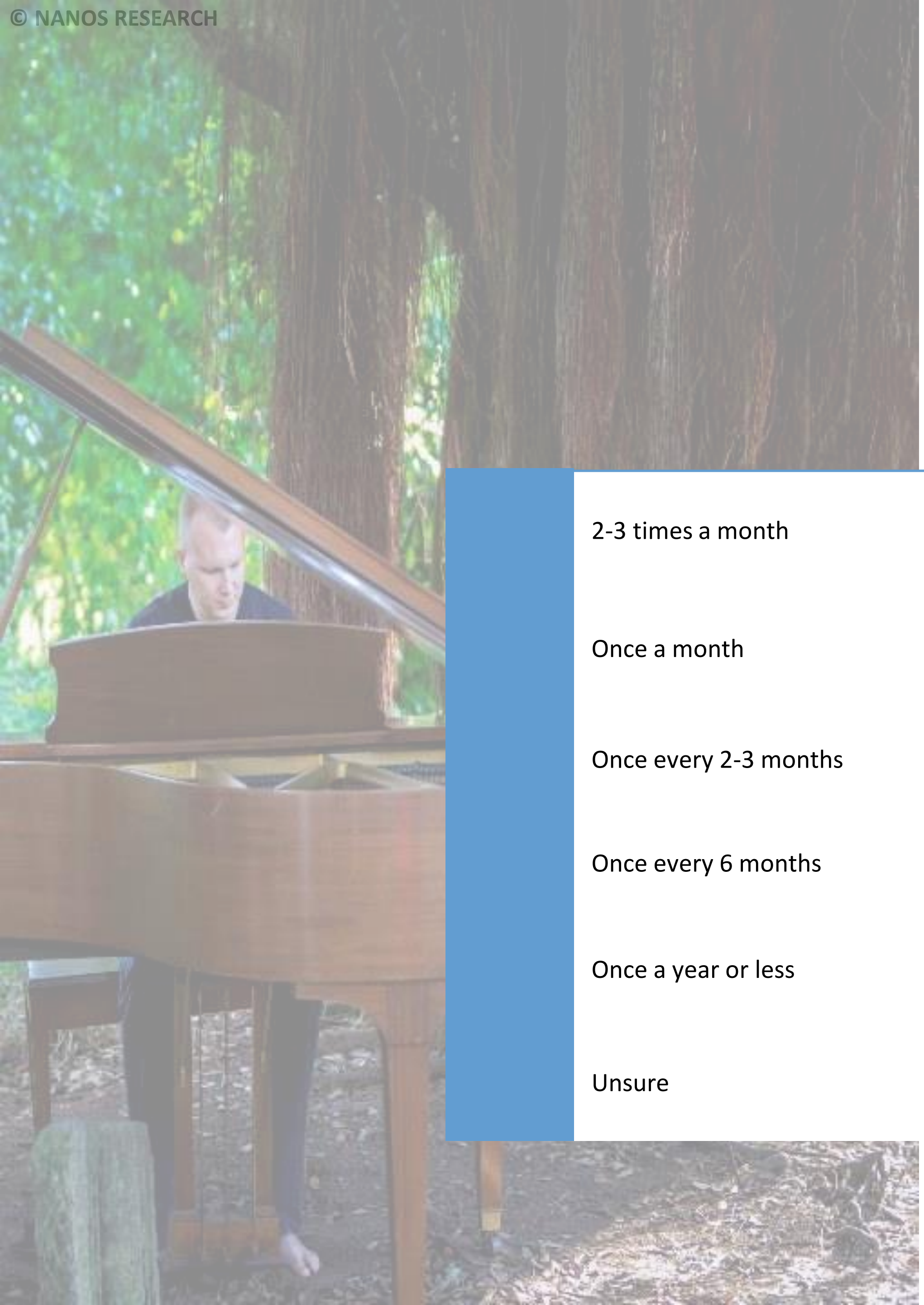
Q – How often do you plan on attending an OUTDOOR ARTS OR CULTURAL PERFORMANCE in the next 12 months?

Frequency of planned attendance – Outdoor events – Outdoor culture-goers - 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, December 30th, 2024 to January 5th 2025, n=460 outdoor culture-goers, accurate 4.6 percentage points plus or minus, 19 times out of 20.



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

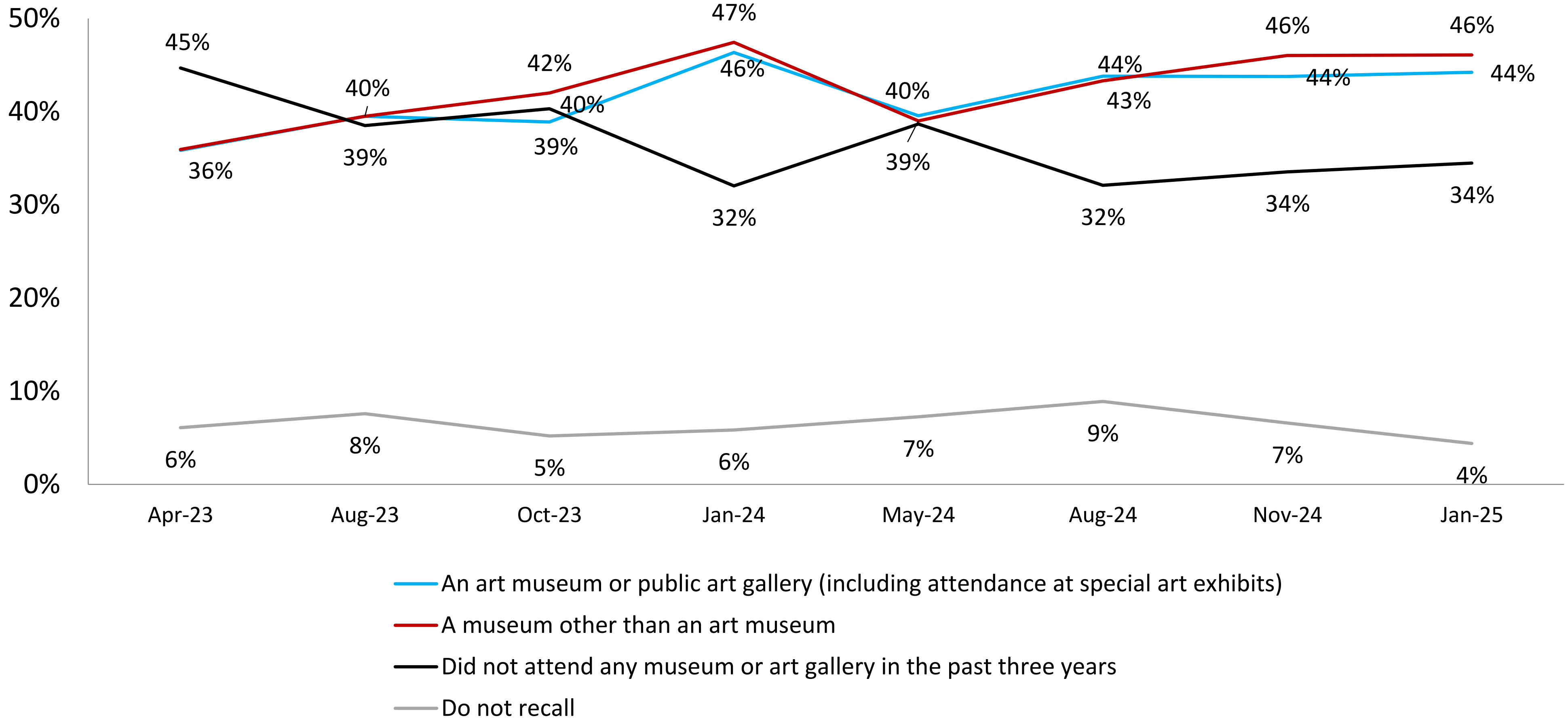
Q – How often do you plan on attending an OUTDOOR arts or cultural performance in the next 12 months?

	Outdoor culture-goers (n=460)	Atlantic (n=50)	Quebec (n=118)	Ontario (n=128)	Prairies (n=86)	BC (n=78)	Men (n=243)	Women (n=217)	18 to 34 (n=75)	35 to 54 (n=181)	55 plus (n=204)
2-3 times a month	2.5%	1.6%	1.2%	3.6%	1.5%	3.8%	2.3%	2.7%	-	3.5%	4.2%
Once a month	7.5%	3.9%	5.1%	9.1%	13.1%	3.8%	8.0%	7.0%	9.2%	8.3%	5.0%
Once every 2-3 months	22.9%	21.6%	24.7%	21.0%	24.5%	23.4%	22.1%	23.7%	23.2%	19.8%	25.8%
Once every 6 months	32.0%	42.5%	36.1%	28.6%	34.3%	25.5%	29.2%	34.6%	27.1%	35.1%	34.0%
Once a year or less	28.6%	22.9%	27.8%	31.3%	21.5%	34.0%	33.8%	23.7%	37.1%	25.9%	22.4%
Unsure	6.5%	7.5%	5.2%	6.5%	5.2%	9.6%	4.6%	8.3%	3.5%	7.5%	8.7%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th 2025, n=460 outdoor culture-goers, accurate 4.6 percentage points plus or minus, 19 times out of 20.

Attendance at art museum/gallery – All Canadians

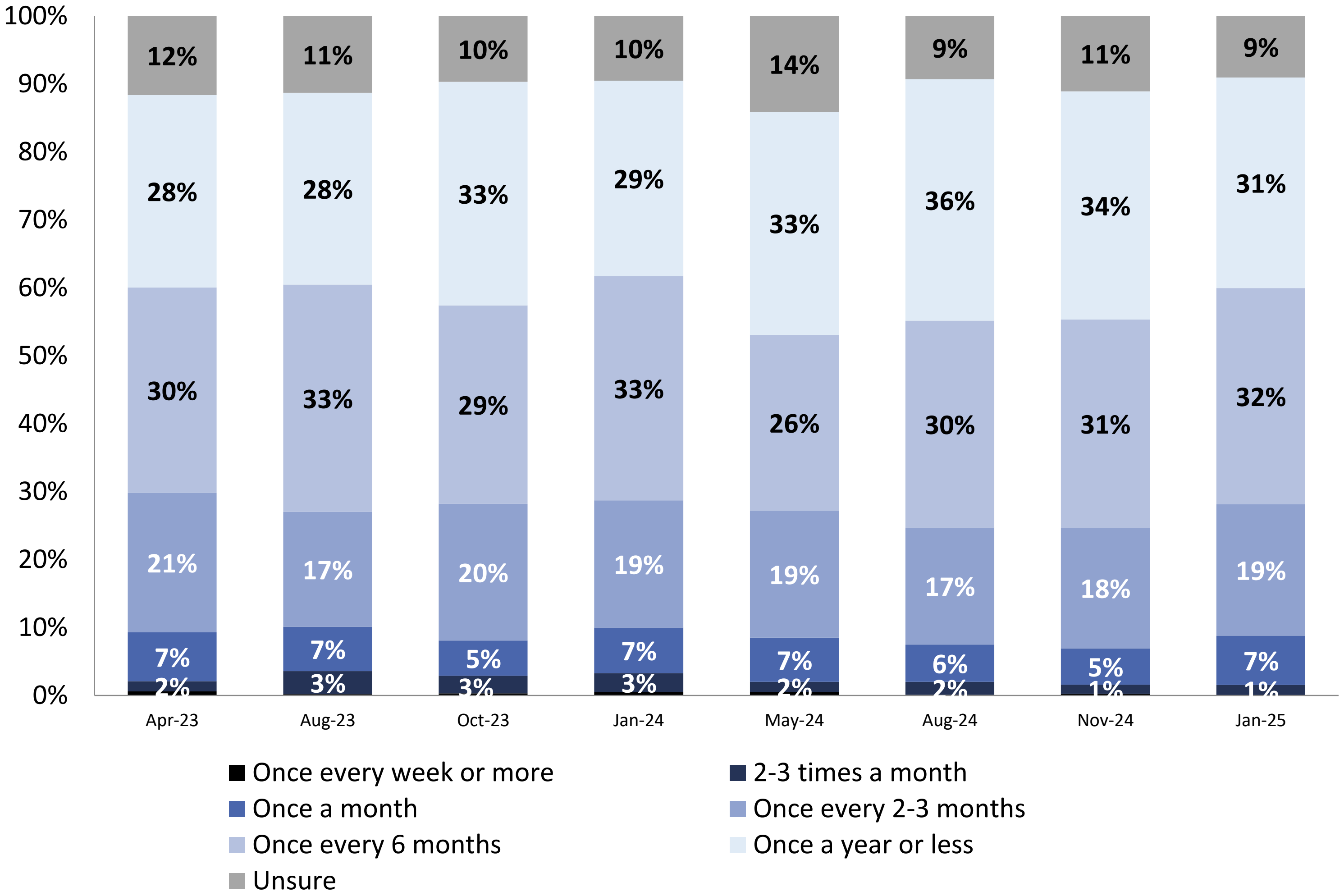
Q – Did you attend any of the following in the past three years? [RANDOMIZE] (select all that apply)



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th 2025, n=1045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

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

Just over one in two museum-goers say they plan on attending an art gallery or museum either once every 2 to 3 months (19%) or once every 6 months (32%), which is consistent with previous waves. Just under one in ten say they plan on attending once a month in the next year (9%), consistent with previous waves.



*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, December 30th, 2024 to January 5th,2025, n=621 art gallery/museum-goers, accurate 3.9 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

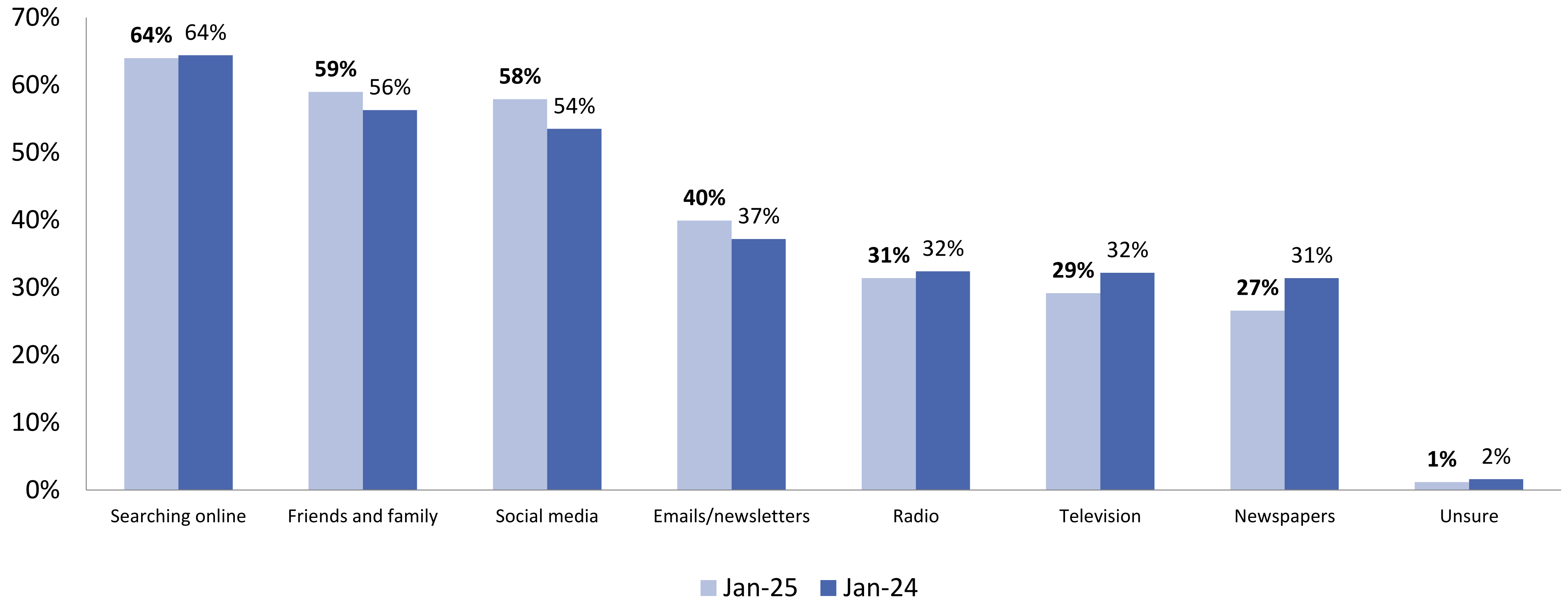
Q – How often do you plan on attending an ART GALLERY OR MUSEUM in the next 12 months?

	Art gallery/ Museum-goers (n=621)	Atlantic (n=60)	Quebec (n=137)	Ontario (n=188)	Prairies (n=125)	BC (n=111)	Men (n=320)	Women (n=299)	18 to 34 (n=93)	35 to 54 (n=228)	55 plus (n=300)
Once every week or more	0.1%	-	-	-	0.3%	-	0.1%	-	-	-	0.1%
2-3 times a month	1.5%	3.7%	3.1%	0.8%	1.5%	-	0.3%	2.5%	1.2%	1.4%	1.8%
Once a month	7.3%	2.9%	7.9%	8.4%	3.7%	8.9%	7.1%	7.4%	8.0%	5.2%	8.3%
Once every 2-3 months	19.4%	18.9%	18.2%	19.9%	20.0%	19.3%	17.5%	20.5%	18.8%	17.2%	21.7%
Once every 6 months	31.8%	40.0%	31.8%	35.2%	25.5%	27.1%	31.6%	32.2%	34.6%	29.1%	31.7%
Once a year or less	31.0%	27.3%	29.0%	26.2%	38.8%	38.3%	34.9%	27.7%	32.8%	37.4%	24.0%
Unsure	9.0%	7.2%	10.0%	9.5%	10.1%	6.4%	8.5%	9.6%	4.6%	9.7%	12.3%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=621 art gallery/museum-goers, accurate 3.9 percentage points plus or minus, 19 times out of 20.

Sources of information on arts and cultural events – Tracking top mentions

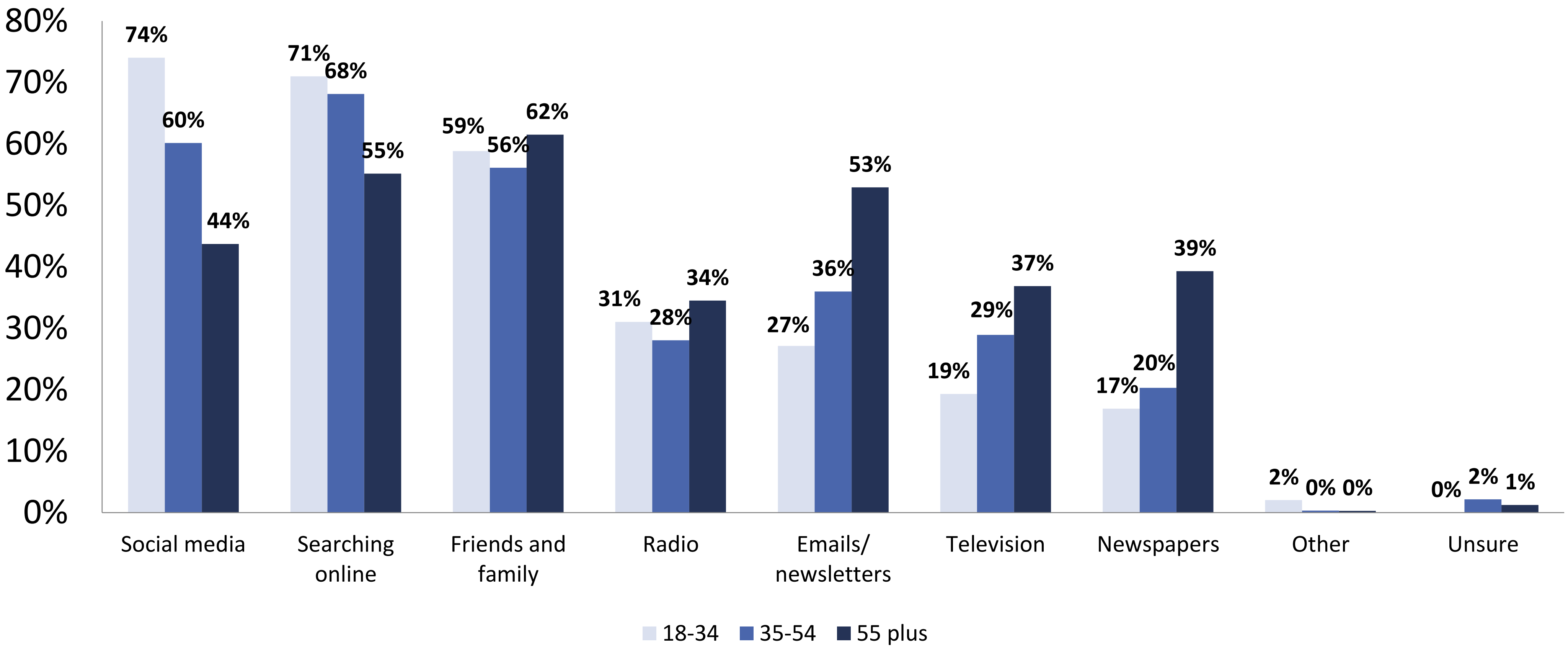
Q – What sources do you go to in order to learn about arts and cultural events to attend? [RANDOMIZE] (Select all that apply)



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=828 culture-goers, accurate 3.4 percentage points plus or minus, 19 times out of 20.

Sources of information on arts and cultural events

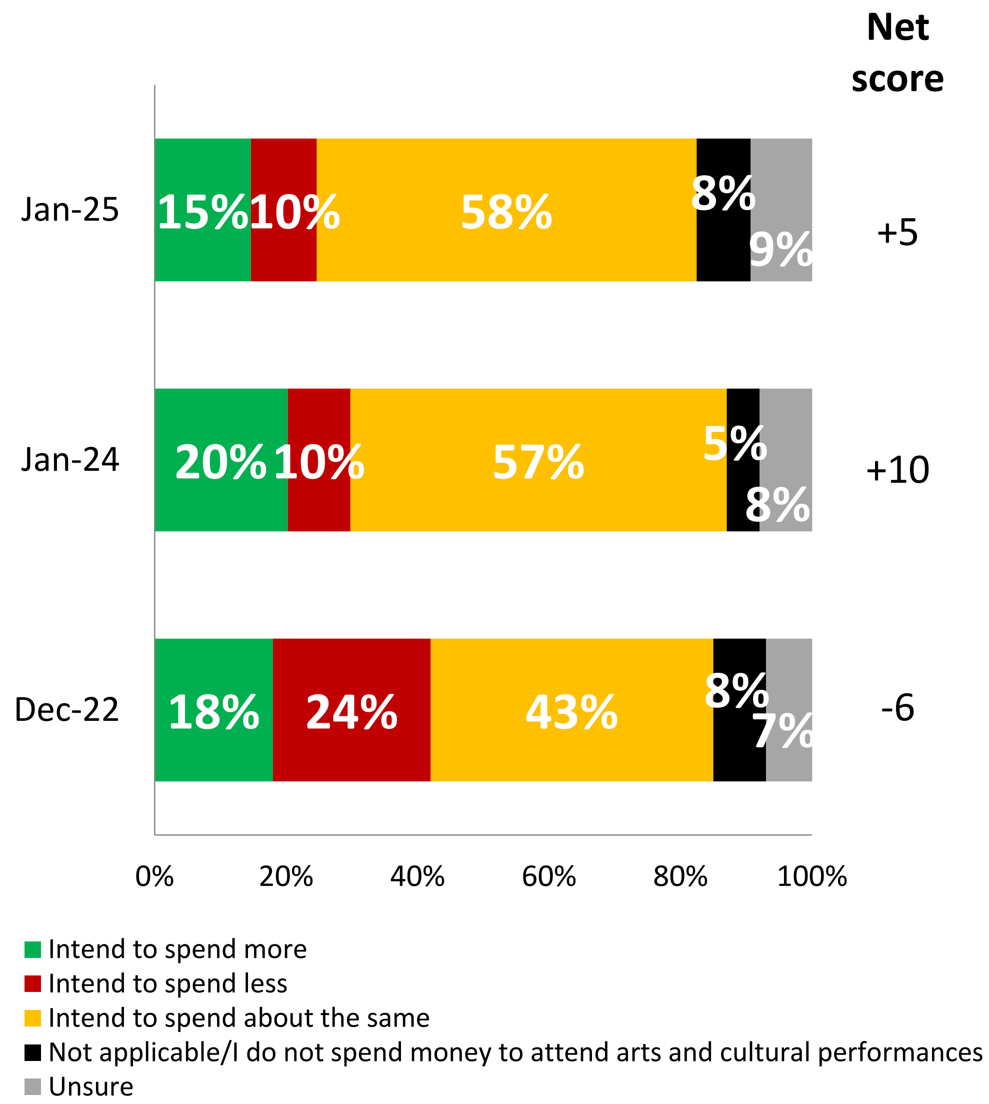
Q – What sources do you go to in order to learn about arts and cultural events to attend? [RANDOMIZE] (Select all that apply)



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=828 culture-goers, accurate 3.4 percentage points plus or minus, 19 times out of 20.

Business/Arts NATIONAL ARTS CENTRE CENTRE NATIONAL DES ARTS NANOS

Intended budget for attending arts and culture in 2025



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

Culture-goers

report a positive net score* of +5 when asked their spending intentions to attend arts and cultural performances. Around three in five culture-goers say they intend to spend about the same amount as they did in 2024 to attend arts and cultural performances (58%), consistent with the previous wave.

January 2024 - In 2024, do you intend to spend more, less or about the same as you did in 2023 to attend arts and cultural performances?
December 2022 - In terms of your total budget, do you intend to spend more, less or about the same in 2023 as you did in 2022 to attend arts and cultural performances?
*The net score is the difference between the positive value (spend more) and the negative value (spend less).

Q – In 2025, do you intend to spend more, less or about the same as you did in 2024 to attend arts and cultural performances?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=828 culture-goers, accurate 3.4 percentage points plus or minus, 19 times out of 20.

Budget breakdown for leisure and entertainment

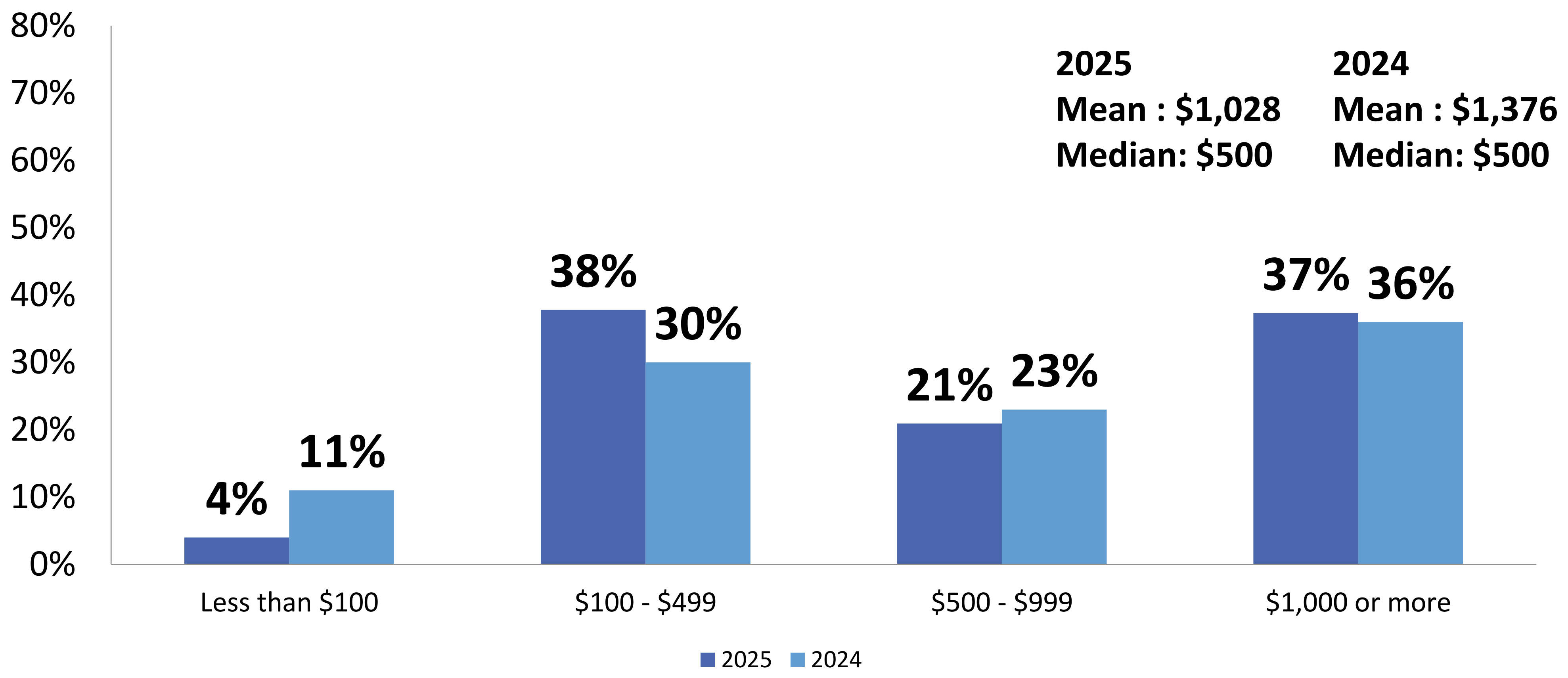
Q – Thinking about your total personal annual budget for leisure and entertainment activities, please rank the top three areas where you spend most of your budget, where 1 is the area you spend the most on, 2 the area you spend the second most and 3 the third most: [RANDOMIZE]

TOP RESPONSES	Jan-25 (n=742)	Jan-24 (n=850)
Traveling	33.4%	34.4%
Dining out, restaurants and/or nightlife	25.4%	20.6%
Subscriptions to streaming services	8.7%	12.1%
Attending concert halls or other indoor performing arts venues	6.8%	8.1%
Hobbies	7.7%	7.7%
Sports and gym membership	6.4%	7.6%
Attending live sporting events in-person	3.2%	3.9%
Attending outdoor music festivals	2.0%	2.0%
Going to the movie theatre	3.7%	1.9%
Museums and art galleries	0.7%	1.0%
Other	1.1%	0.3%
Unsure	0.9%	0.5%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=742 culture-goers, accurate 3.6 percentage points plus or minus, 19 times out of 20.

2025 personal annual entertainment budget

Q – Thinking about your total personal annual budget for leisure and entertainment activities, how much do you expect to spend to attend arts and cultural events in 2025? $____



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=725 culture-goers who report spending to attend arts and culture, accurate 3.6 percentage points plus or minus, 19 times out of 20.

Business/Arts NATIONAL ARTS CENTRE CENTRE NATIONAL DES ARTS NANOS

Attending new experiences for the first time

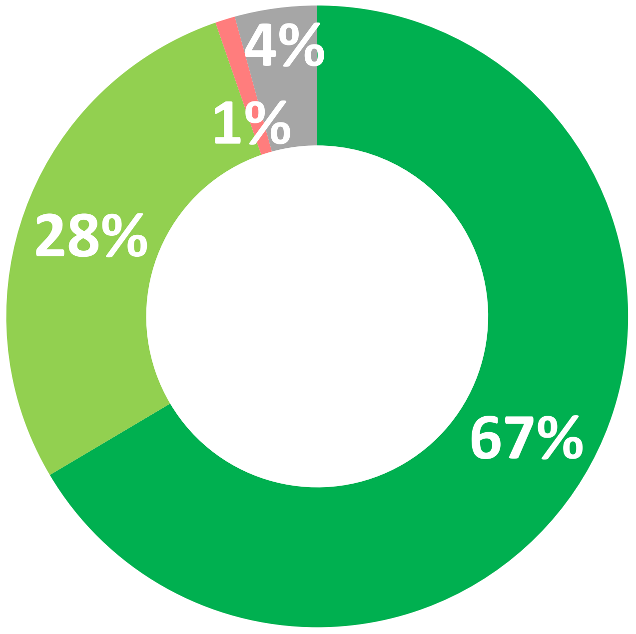
Q – In the past year, on how many occasions, (if any), have you attended an exhibit or performance at a cultural organization for the first time, where you didn't have previous familiarity/experience with that cultural organization?_____

TOP RESPONSES

	Frequency (n=770)
Mean	**1 occasion**
Median	**0 occasions**
No occasions	50.4%
One occasion	26.9%
Two occasions	12.8%
Three occasions	5.3%
Four occasions	1.4%
Five occasions	1.5%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30^{th}, 2024 to January 5^{th}, 2025, n=770 culture-goers, accurate 3.5 percentage points plus or minus, 19 times out of 20.

First experience



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

Positive/Somewhat positive

Atlantic (n=33)	Quebec (n=103)	Ontario (n=106)	Prairies (n=64)	BC (n=63)
92.0%	96.4%	94.0%	94.4%	94.7%
Men (n=190)	Women (n=177)	18 to 34 (n=62)	35 to 54 (n=153)	55 plus (n=154)
92.2%	96.9%	93.7%	94.8%	95.7%

Somewhat negative*

Atlantic (n=33)	Quebec (n=103)	Ontario (n=106)	Prairies (n=64)	BC (n=63)
-	2.4%	0.7%	1.1%	-
Men (n=190)	Women (n=177)	18 to 34 (n=62)	35 to 54 (n=153)	55 plus (n=154)
2.2%	-	-	0.5%	2.7%

*Although the response key included "negative", no respondent selected negative for this question.

Q – [IF ATTENDED NEW EXPERIENCE IN PAST YEAR] Thinking of that first experience, would you rate it as a positive, a somewhat positive, a somewhat negative or a negative experience?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=369 first time attendees to a new experience, accurate 5.2 percentage points plus or minus, 19 times out of 20.

Business/Arts
NATIONAL ARTS CENTRE
CENTRE NATIONAL DES ARTS
Canada is our stage. Le Canada en scène.
NANOS

Enhancing the experience

Q – [IF ATTENDED NEW EXPERIENCE IN PAST YEAR] Thinking of that first experience, what is one thing that the organization could do to enhance your experience? [OPEN]

TOP RESPONSES		Frequency (n=249)
	None/no improvements/I'm satisfied/It is excellent	32.4%
	Advertise more in advanced/improve advertisement/provide more details about the programs	14.9%
	Less expensive/more deals/keep costs low	6.3%
	Better artists/entertainment/greater variety	5.6%
	Organization/more prepared/better planning of the event	5.3%
	More variety in times of shows/more frequent events	4.5%
	Make it more accessible/more wheelchair accessibility/better signage	4.0%
	A different venue/a better facility/a larger venue	3.5%
	Unsure	9.8%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=249 first time attendees to a new experience, accurate 6.3 percentage points plus or minus, 19 times out of 20.

Business/Arts

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

NANOS

METHODOLOGY

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,045 Canadians, 18 years of age or older, between December 30th, 2024 to January 5th 2025 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 dialing with a maximum of five call backs.

The margin of error for a random survey of 1,045 Canadians is ±3.0 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.

TECHNICAL NOTE

Element	Description
Research sponsor	Business / Arts and the National Arts Centre
Population and Final Sample Size	1,045 Randomly selected individuals.
Source of Sample	Nanos Probability Panel
Type of Sample	Probability
Margin of Error	±3.0 percentage points, 19 times out of 20.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.
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.
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online
Number of Calls	Maximum of five call backs to those recruited.
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.
Field Dates	December 30th, 2024 to January 5th 2025.
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/

Element	Description
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.
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.
Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not participate.
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.
Estimated Response Rate	14 percent, consistent with industry norms.
Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Question Content	Topics on the omnibus ahead of the survey content included: views on political issues, views on economic issues, U.S. relations, tax policy and views on the current federal government.
Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Research/Data Collection Supplier	Nanos Research
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.
Data Tables	By region, age and gender By profile

ABOUT NANOS

NANOS RESEARCH

As one of North America's premier market and public opinion research firms, we put strategic intelligence into the hands of decision makers. The majority of our work is for private sector and public facing organizations and ranges from market studies, managing reputation through to leveraging data intelligence. Nanos Research offers a vertically integrated full service quantitative and qualitative research practice to attain the highest standards and the greatest control over the research process. www.nanos.co

nanos dimap analytika

NANOS dimap

This international joint venture between dimap and Nanos brings together top research and data experts from North American and Europe to deliver exceptional data intelligence to clients. The team offers data intelligence services ranging from demographic and sentiment microtargeting; consumer sentiment identification and decision conversion; and, data analytics and profiling for consumer persuasion. www.nanosdimap.com

EthicStrategies

Ethic Strategies was created by the founding partners of PAA Advisory and the Nanos Research Corporation, both recognized leaders in research, advocacy, and advisory. Ethic provides bespoke strategic counsel, advice, and communications strategies to organizations facing serious issues. www.ethicstrategies.com

Any questions?

Nanos Research

(613) 234-4666, ext. 237

ea@nanosresearch.com

For more information on the firm, please visit www.nanos.co

NANOS IS YOUR GO-TO HIGH-STAKES RESEARCH PARTNER.

Delivering world-class solutions since 1987,

we are the leader in high velocity data insights and visualization.

Market | Consumer| Reputation| Policy| Insight

For more information about our services, please visit us at:
www.nanos.co