

Stone —  
Olafson

# Spotlight on Arts Audiences

Looking at Results



# 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.

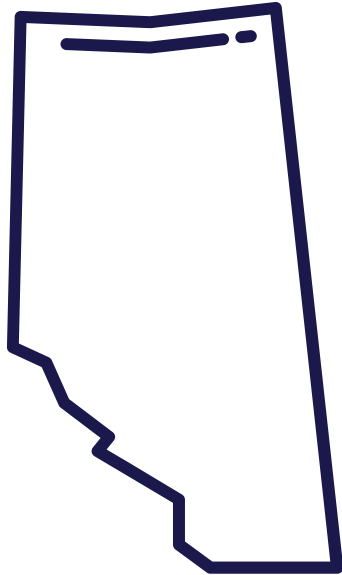
**We thank them for their generous support.**



# How do we conduct the research?

**1,160**

surveys



**400**

surveys





# Repository of research covering a multitude of topics



Audience habits  
and behaviours

Barriers to  
participation

Philanthropic support of the arts

Perceptions  
towards the arts

How to inform and  
reach audiences

Impact of the arts

How to inspire audiences

Consideration  
and decision-  
making process

Community  
sentiment

Content and programming preferences

Arts education

Creating  
remarkable  
experiences

Spending and  
affordability

Subscription and  
ticketing options

Communication  
preferences

Role of  
digital vs. live

Enhancing  
the overall  
experience

The role of  
messaging and  
advertising



Let's start by taking a step back

# Post-Covid Environment:

This period in history caused a **fundamental shift** in how people **interact in the world**.

And we can no longer **expect things to be as they were**.



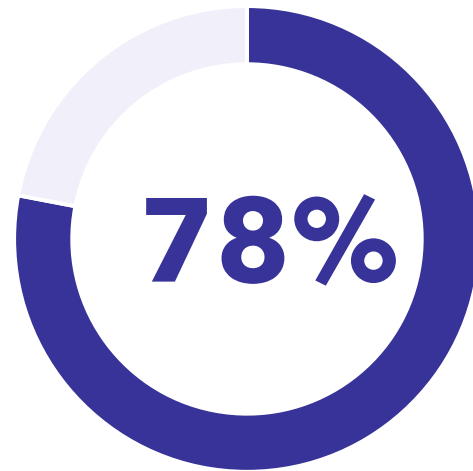




## Some of the key things we have noticed shifting:

- ✓ Attendance patterns have shifted
- ✓ Time is a commodity to consider
- ✓ Preferences for ticketing and subscriptions
- ✓ Increased desire for choice and flexibility

# Audience behaviours have shifted post-covid for a number of reasons



of Calgarians say I don't attend shows as much as I used to but I **still love** the experience



# Audience behaviours have shifted post-covid for a number of reasons

**78%** I don't attend shows as much as I used to but **I still love** the experience

**75%**



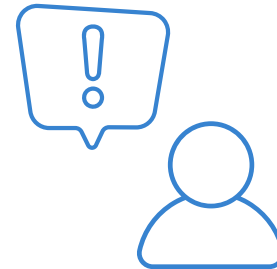
**FINANCIAL  
REASONS**

**66%**



**RELEVANCE**

**61%**



**COMFORT**

**54%**



**CONVENEINCE  
OR EASY**

There are two primary currencies of engagement:



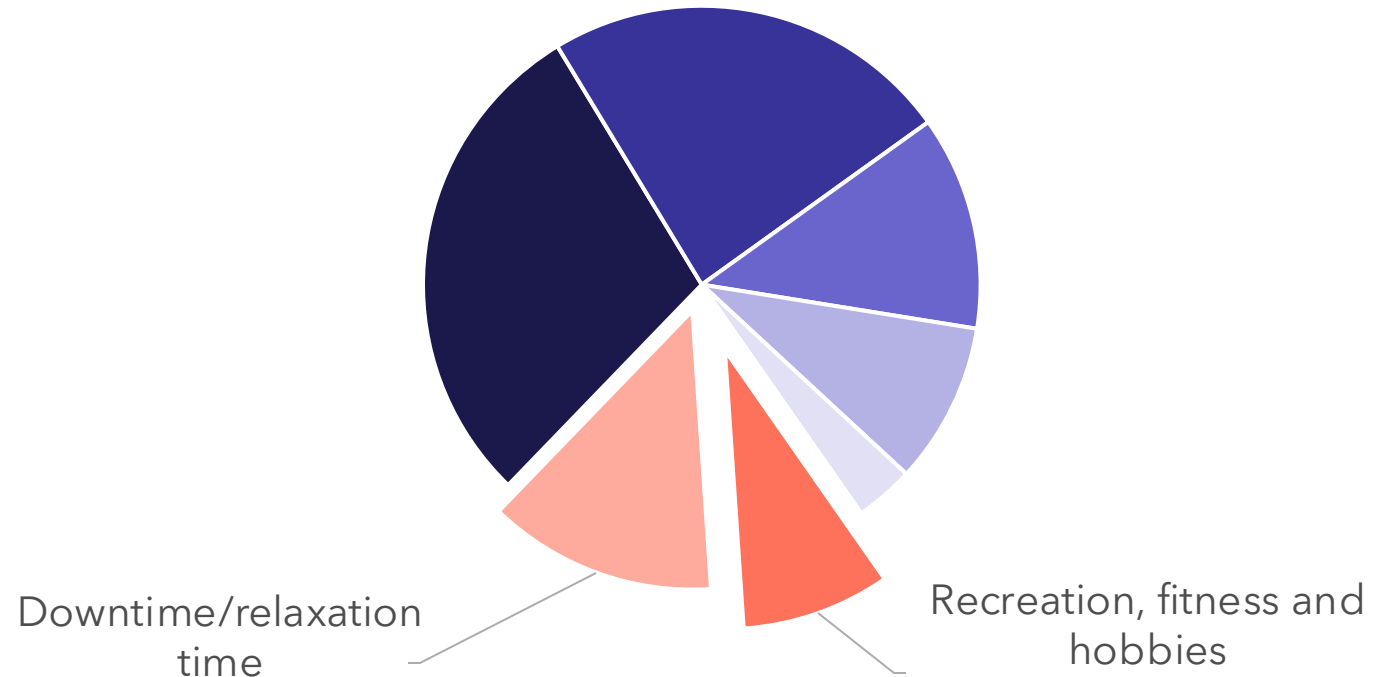
# And the competition for **TIME** is fierce



Audiences only have

**16 hours of free time a week**

to devote to discretionary activities





The proportion of  
those captive to  
**TIME** is notable...

but **NOT**  
insurmountable



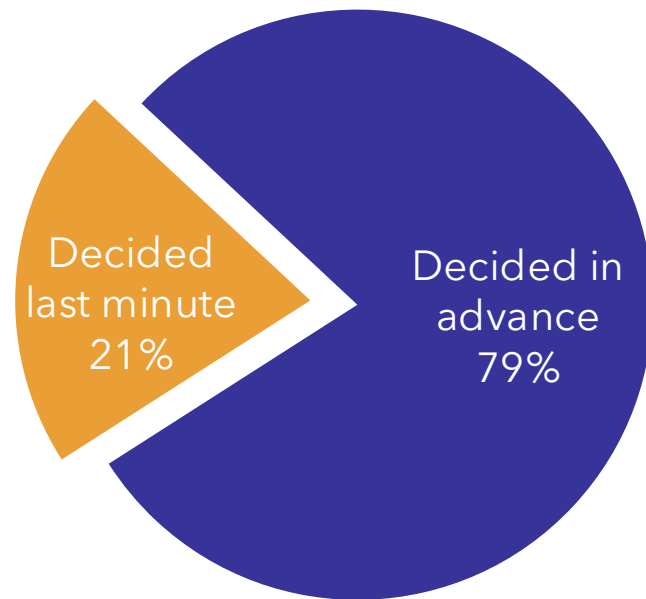
By the time Friday or Saturday rolls around,  
I'm often too tired to do much.



I'd love to attend more shows or events,  
but I just don't have the time.

# Audiences are still making decisions in advance...

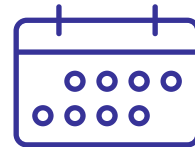
Planning for all experiences/activities



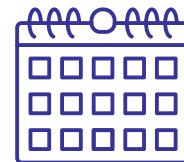
...but may be only committing at the very end.



**53%** Within a day of event



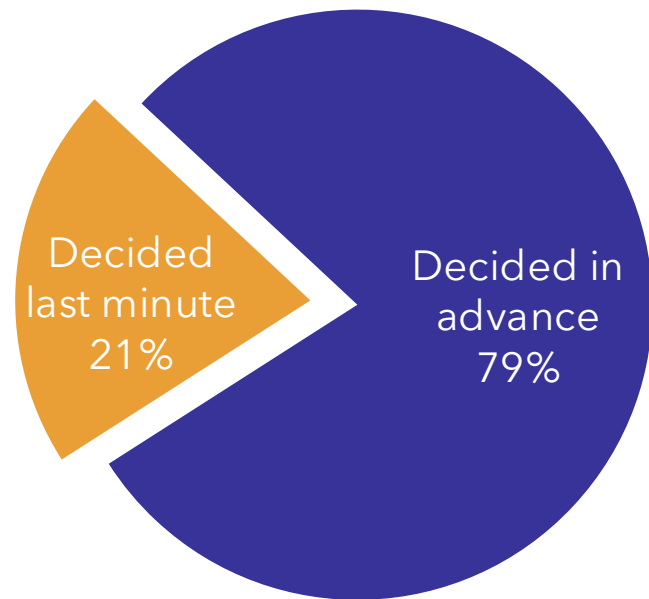
**25%** One week before event



**23%** More than a week before

# Audiences are still making decisions in advance...

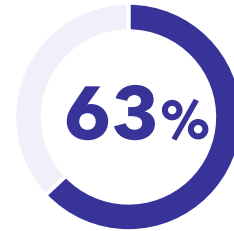
## Planning for all experiences/activities



**And they are looking for more choice and flexibility than ever before.**



Of Calgarians say I prefer a variety of experiences rather than have a season subscription or membership to one thing.



Of Calgarians say I prefer to budget for many activities/experiences at a lower cost rather than spending it all in one place



# What does this mean?



The market has changed dramatically since 2020.



Audiences are **eager for experiences** but still selective.



Organizations across the experience economy have to operate in much more **competitive circumstances.**







**Reframing how...and who...  
you engage**



We know 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.

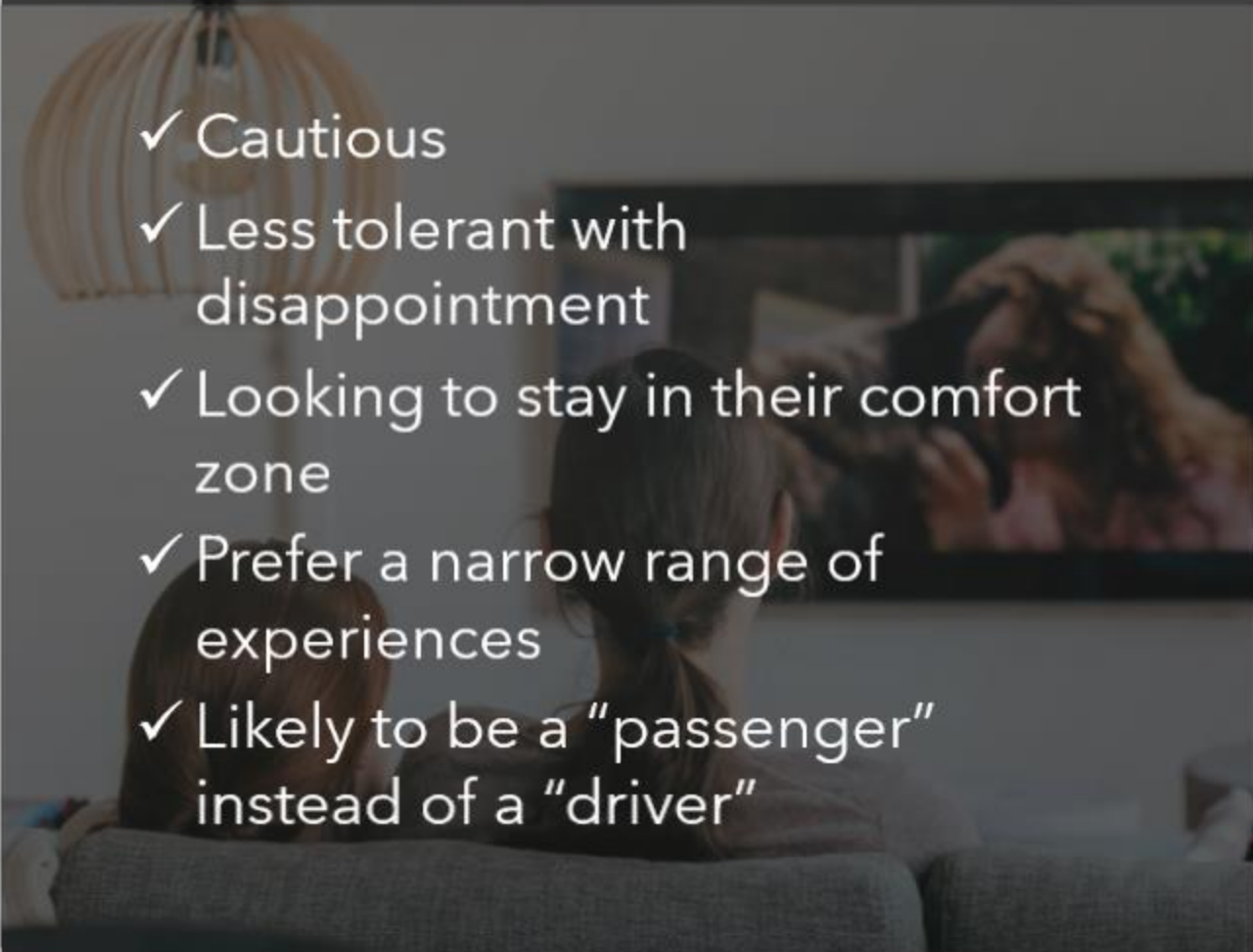


# But luckily there is a large, untapped audience to reach

## Younger audiences...

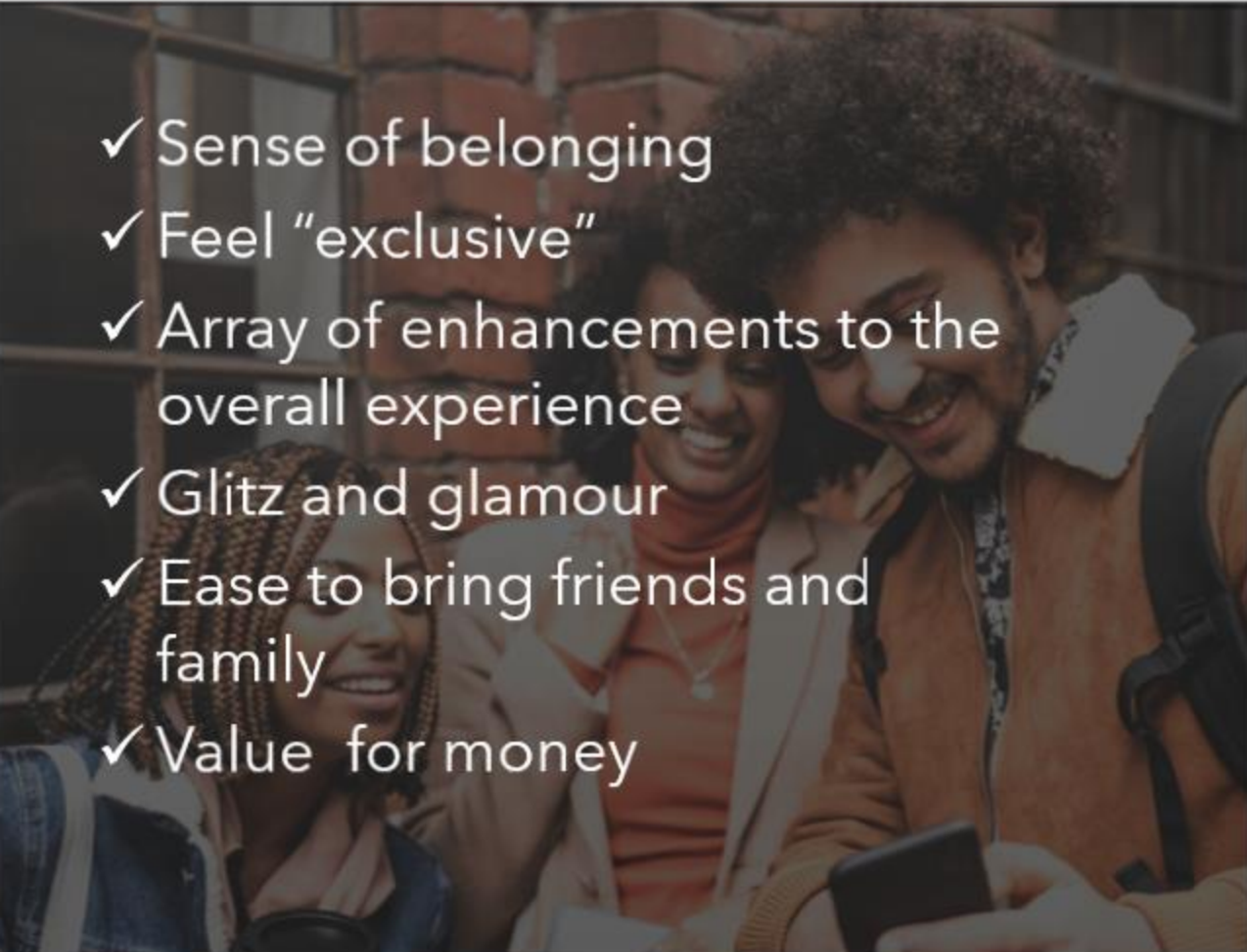
- 
- ✓ Higher participation with digital experiences
  - ✓ Adventurous
  - ✓ Prefer a wider range of experiences
  - ✓ More time but less money
  - ✓ More pessimistic about local conditions but greater desire to engage with the arts

## Passive audiences...

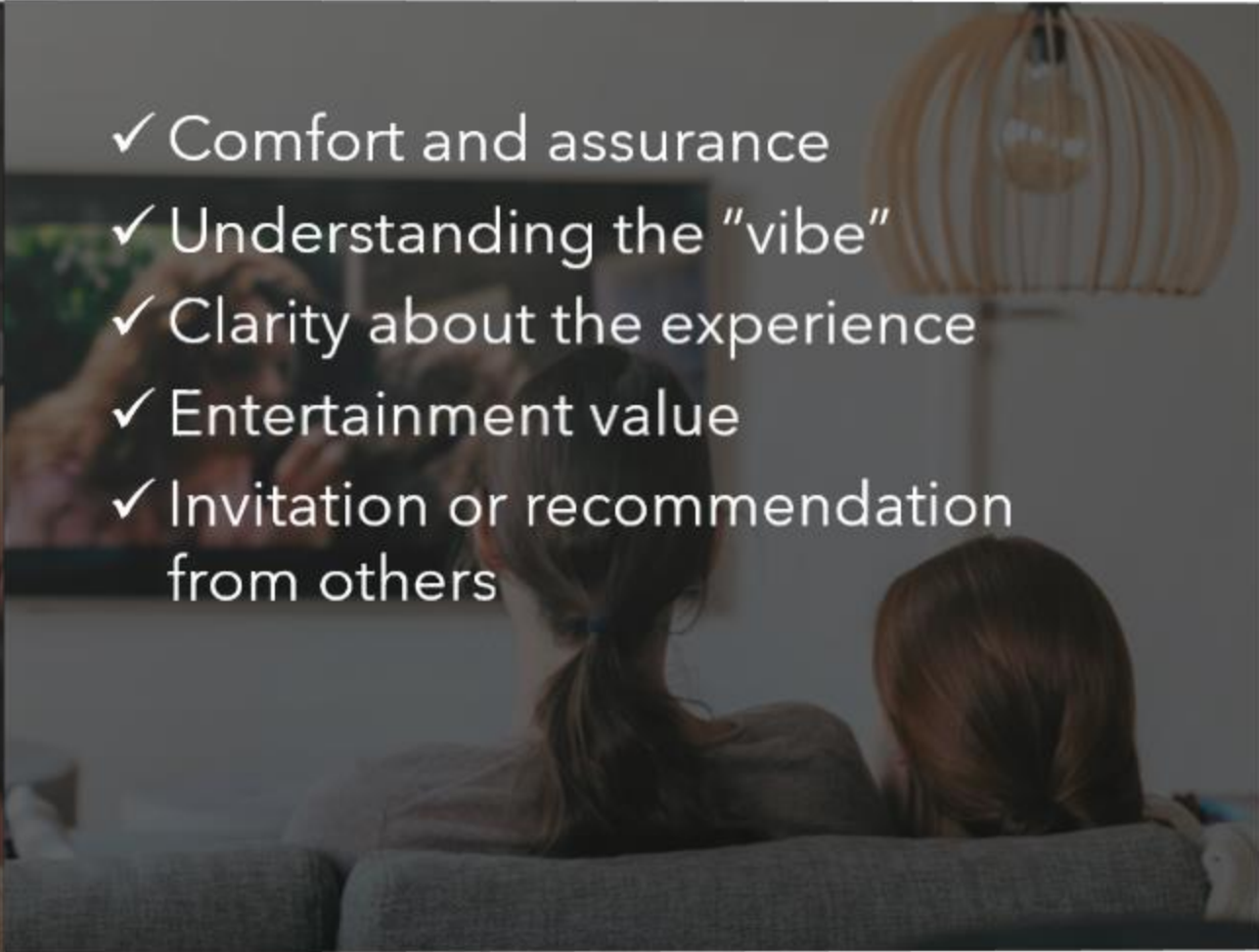
- 
- ✓ Cautious
  - ✓ Less tolerant with disappointment
  - ✓ Looking to stay in their comfort zone
  - ✓ Prefer a narrow range of experiences
  - ✓ Likely to be a "passenger" instead of a "driver"

# But their needs and wants are different, and both will require a different approach

## Younger audiences...

- 
- ✓ Sense of belonging
  - ✓ Feel “exclusive”
  - ✓ Array of enhancements to the overall experience
  - ✓ Glitz and glamour
  - ✓ Ease to bring friends and family
  - ✓ Value for money

## Passive audiences...

- 
- ✓ Comfort and assurance
  - ✓ Understanding the “vibe”
  - ✓ Clarity about the experience
  - ✓ Entertainment value
  - ✓ Invitation or recommendation from others

# What does this mean?



Increased relevance and better business outcomes will likely hinge on getting a **wider share of the pie** instead of a greater share of the existing wallet.



The **passive audience** looks different and factors in different things: comfort and assurance.



**Younger audiences** are also key to growing your base and also look different.



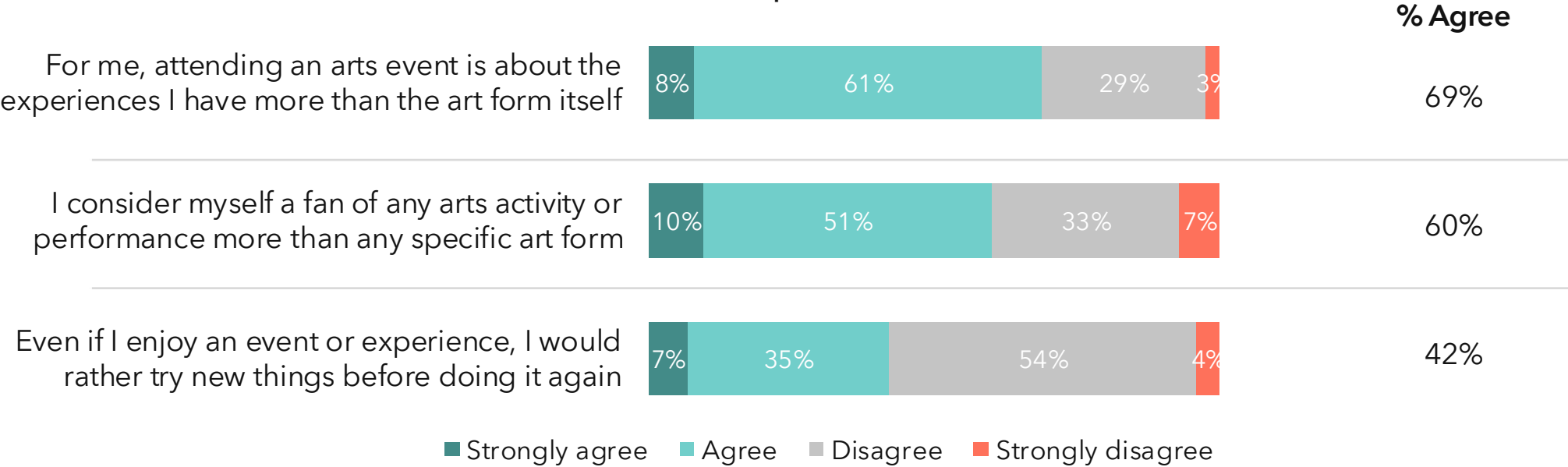




**How can we enhance  
the entire experience?**

# The experience matters just as much as the art or content itself, particularly if we are pursuing new audiences:

## Attitudes Toward Experiences



# Practicality is the gateway to remarkable

PRE  
EVENT



DURING  
EVENT



POST  
EVENT



# Friction is a factor throughout the engagement

Audiences are looking for enhancements that make the pre-event easier.





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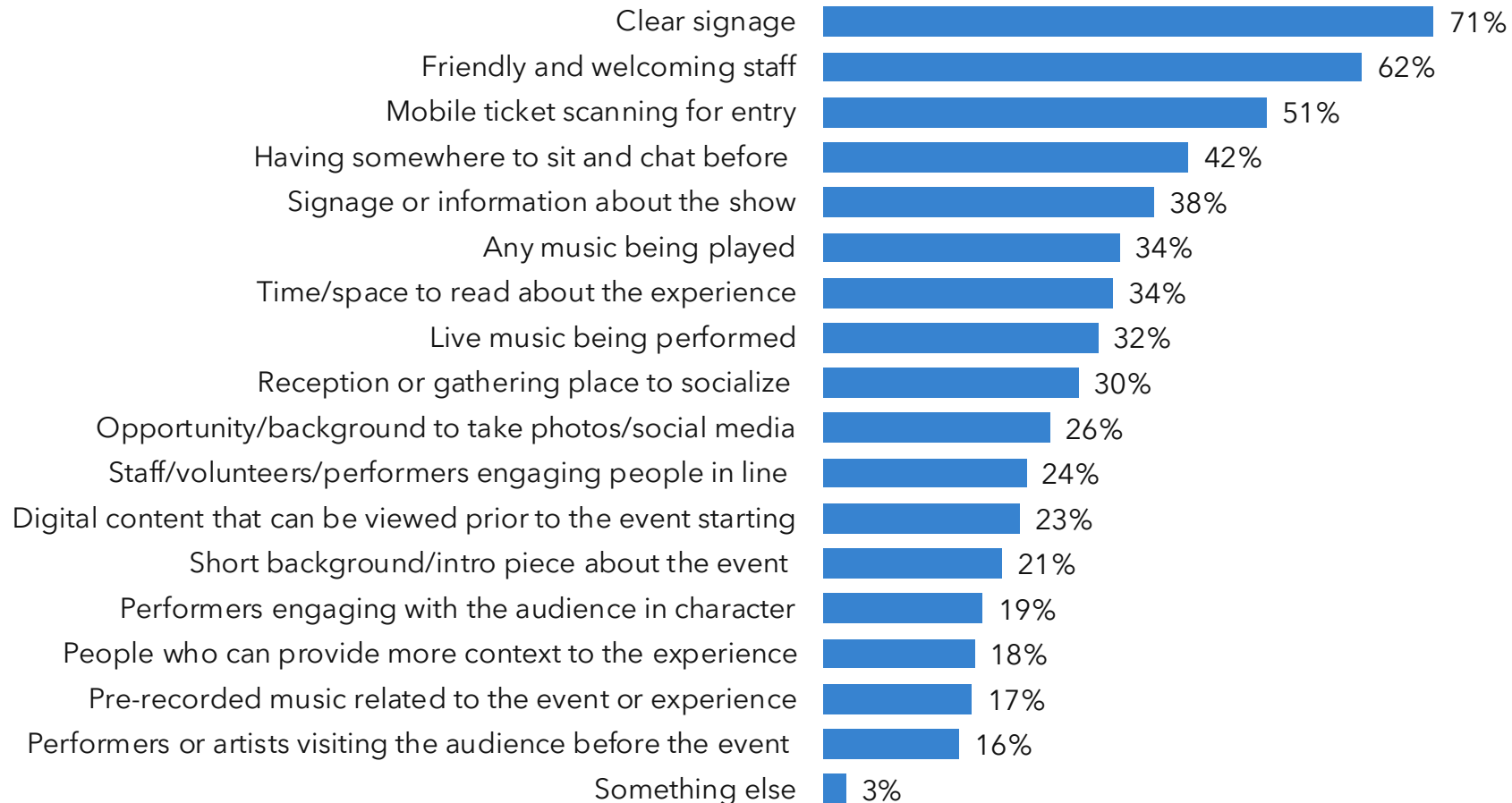


## What does this mean for organizations?

- Help them with the lead-up to the activity.
- Provide planning tools for before and after
- Help with planning for activities for before or after
- Offer direct and clear information on information about the event.

# While guests are attending, clear signs and friendly staff go a long way

## Attendance Enhancements



## While guests are attending, clear signs and friendly staff go a long way

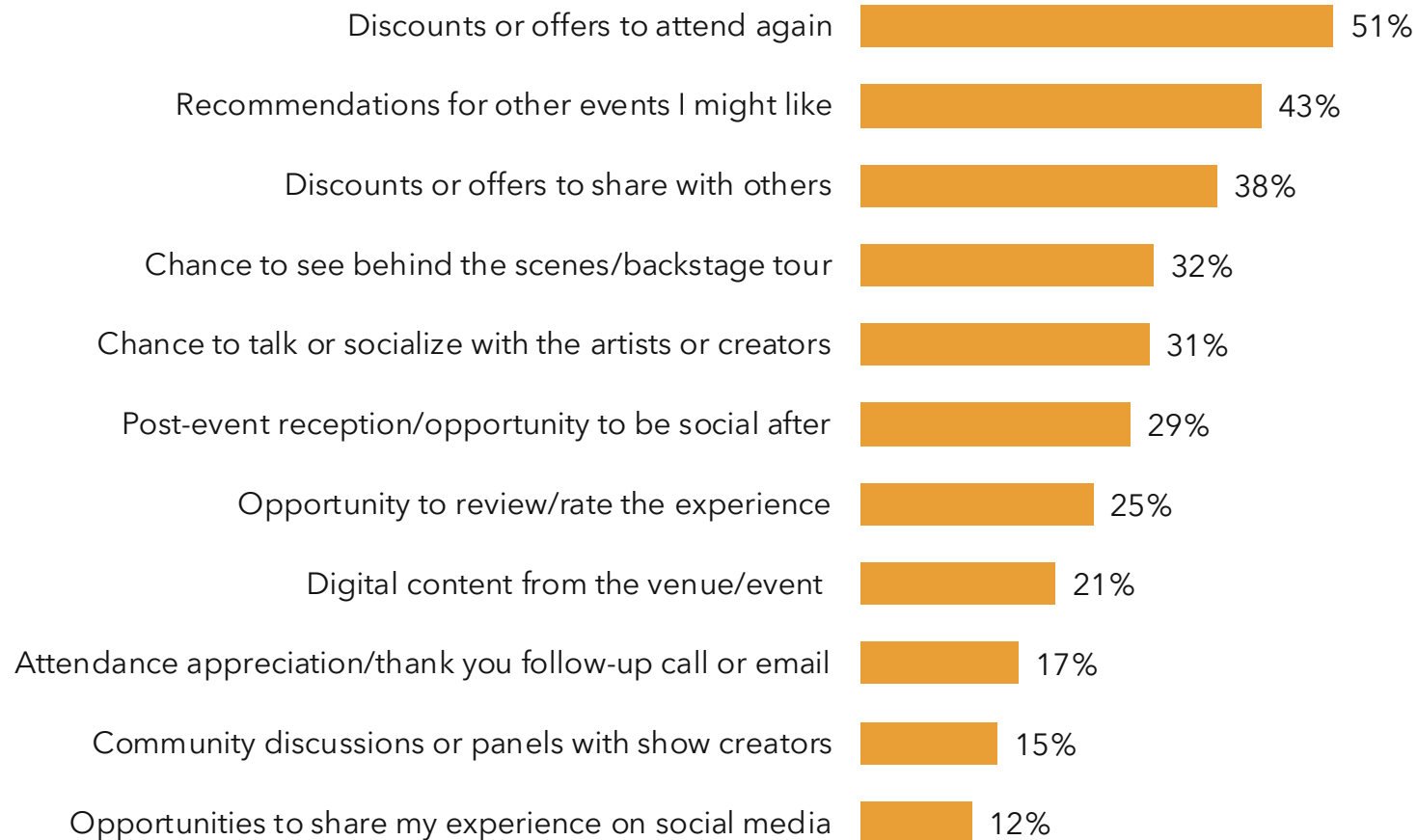
### Attendance Enhancements



These are the **practical elements** that audiences are asking for to make their experience easier and more comfortable overall.

# Post-experience enhancements provide an opportunity to inspire return visits

## Post-experience Enhancements





## Post-experience enhancements provide an opportunity to inspire return visits

### Post-experience Enhancements

Discounts or offers to attend again 51%

**This is where the path to retention begins:**

**92%**

of Calgarians say when I see a great show or visit a great event, I actively recommend attending to friends and family

**76%**

of Calgarians say once I find an event or experience I enjoy, I will go back again and again

# Once you build retention, loyalty can come next

## So, how do you inspire repeat visits?





# Once you build retention, loyalty can come next

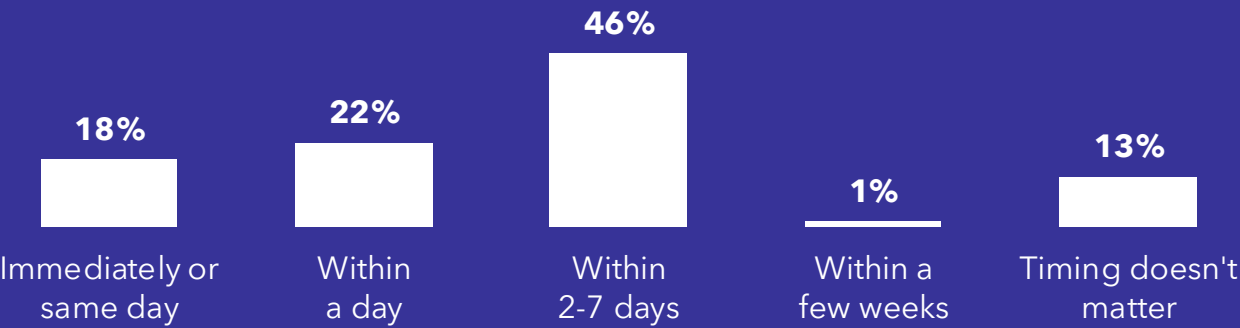
So, how do you inspire repeat visits?



**Reconnecting** with audiences post-event is an opportunity to solidify a connection.

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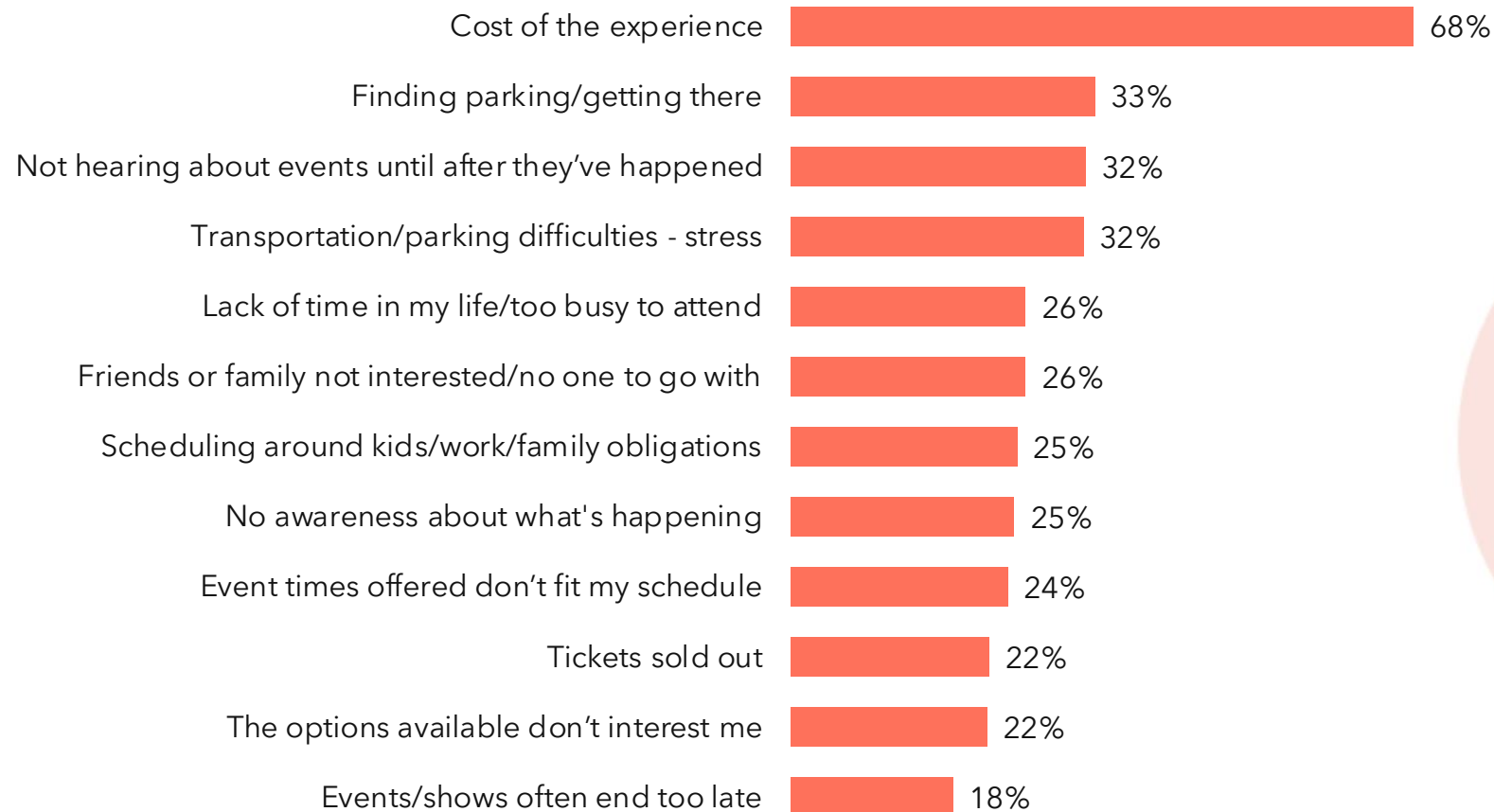
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# But anything that inspires greater attendance will still need to address barriers

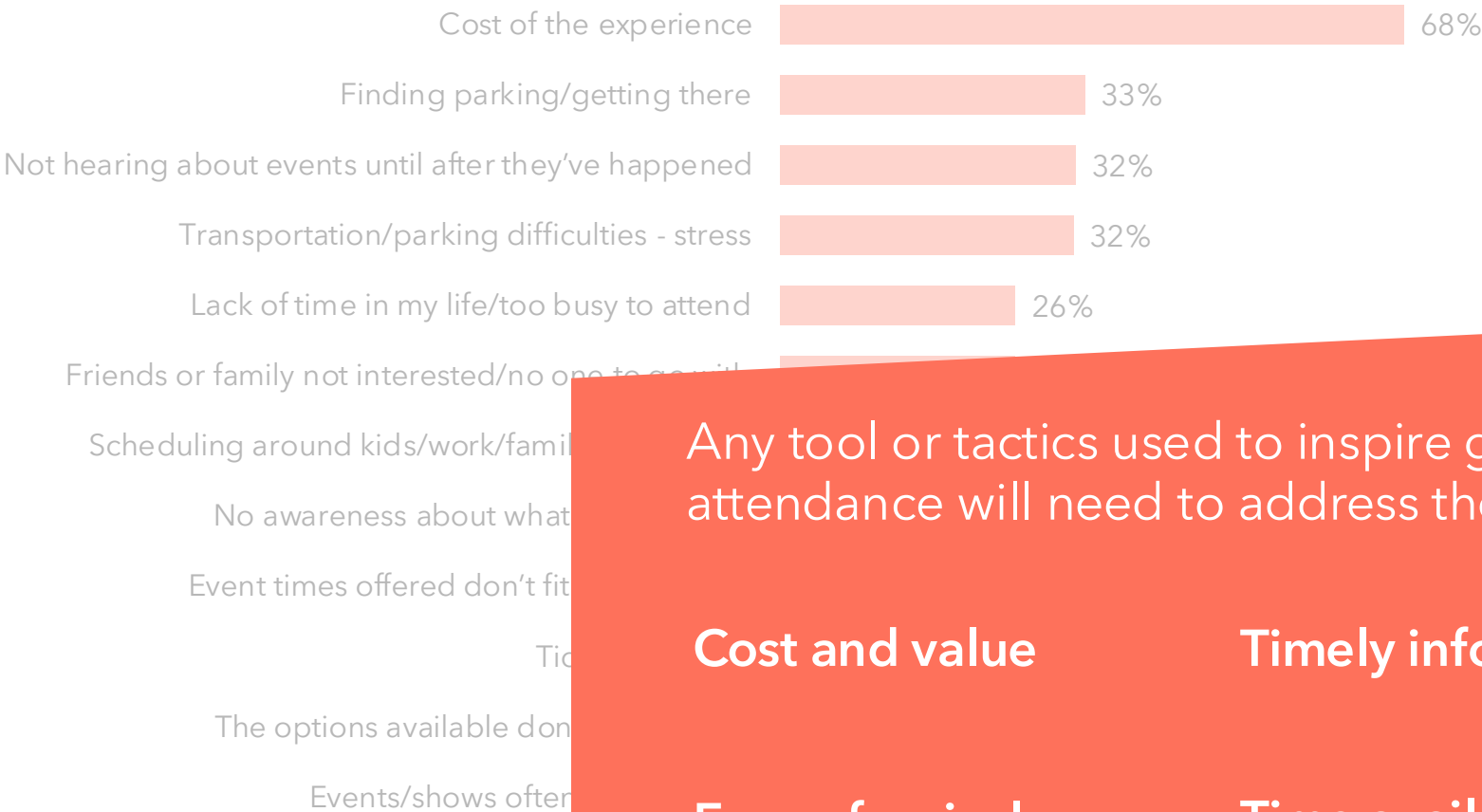
## Barriers to Attending Art Experiences More Often



**0.5%**  
mention  
cost as the  
only reason  
to not  
consider an  
activity.

# But anything that inspires greater attendance will still need to address barriers

## Barriers to Attending Art Experiences More Often



Any tool or tactics used to inspire greater attendance will need to address these barriers:

Cost and value

Timely information

Ease of arrival

Time availability

# What does this mean?

Be **wholistic in how you think about experiences.**

From the start of planning to their arrival, what happens between performances, etc. Its not just what's on stage that drives the experience.

**Remove the hassle** and make every step of their journey remarkable.

From there, you can extend this thinking to the rest:

- **Programming**
- **Marketing**
- **Loyalty**







**This is challenging work  
but worth it**



## Calgarians know the arts can have a tremendous impact



**70%** of Calgarians agree art and culture contributes to a vibrant city or community.



**40%** of Calgarians indicate there are too few arts events in our community.

Thank you.



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