

# Spotlight on Arts Audiences

Wave 4: Winter 2025

Regional Alberta results

March 2025



# 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.**



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# A collaborative and evolving resource

## Purpose & Objectives:

As Alberta continues to recover from a pandemic five years ago that changed public life and reshaped the economy, market conditions continue to be volatile and unpredictable. This work was developed exclusively for the arts sector to help arts organizations understand the market and their audiences. 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 4:

- Explore general interest in the arts/current levels of arts participation
- Capture updated understanding of consumer mindset
- Assess how well consumers expectations are being met in the arts
- Explore methods to inspire potential audiences (mid-funnel marketing)

## How to use this report:

- This work is designed to be shared and applied. We encourage our partners to distribute and actively apply the insights to their business.
- Incorporate your data to deepen the application of this information for your needs. Adding ticket sales data or audience profiling helps extend and customize the insights for your organization.



# Research Approach

**This report represents the fourth 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.

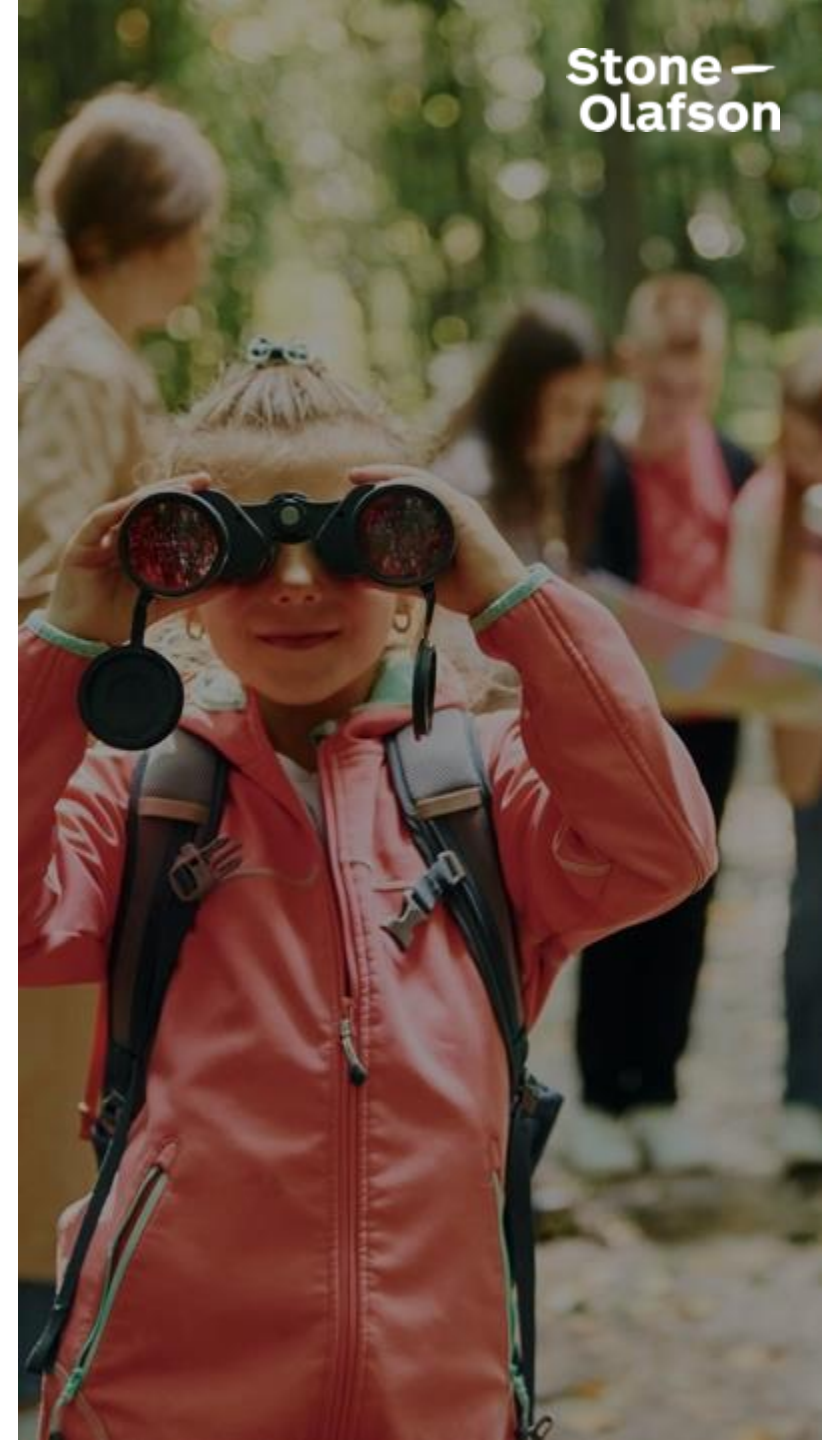
A total of n=1,160 surveys were collected across the following regions:

- 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 January 17<sup>th</sup> - 27<sup>th</sup>, 2025.**

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





A reminder of what we've  
learned so far

Each phase of this work is designed to build on what we learned before. Outcomes do not replace findings from earlier phases. This research is most useful when all waves are considered. Some important points from previous waves:



1. **Not everyone engages to the same degree.** We know we already attract audiences who are deeply engaged or immersed in the arts. Our goal is to inspire more connections with the 51% who are passively engaged.



2. **There are two currencies of engagement: time and money.** And competition for the 16 hours a week and the \$200/month is fierce.



3. **Showing value for time and money** is not about dollars and cents – it's about emotional and personal resonance. Show the benefits of connecting and you will be able to show value in a more meaningful way.



4. **Arts education** can be a valuable way to attract more audiences but it's about the benefits (experience, enjoyment, memorable, novel) more than the learning.



5. **Affordability is a challenge** that is not going away. Spending is constrained but it is happening. Offering savings is helpful but it's not the whole story. Remember to also talk about the return on their investment – which are the benefits.



6. **The planning window has shortened,** and audiences are committing much closer to the event. But they are considering it way before they choose to commit. Inspire consideration early but be ready for a last-minute decision.



What are we seeing  
this winter?



# The mindset of Albertans has shifted decidedly negative...

- A lack of economic stability and ongoing uncertainty is causing difficulties for Albertans. This is leading to feelings of lethargy and unease, which creates a challenge to showcase the value of experiential offerings to residents who are becoming more and more strict about their time and money.
- In the midst of challenging conditions, this data shows how important arts and culture are to the overall health of the community and helping audiences deal with uncertainty. The effort put forth by artists and those within the experience economy positively impact one's attitudes. The arts are, in effect, a salve.
- Albertans are clear: our communities need to come together now more than ever. Given the ability of arts experiences to bring people together, arts and cultural experiences are essential for one's quality of life.
- Why does this matter? Albertans want an escape, to have fun, but they remain sensitive to economic conditions. They want to know exactly what they are getting, and how easy it will be. Your tone, language, and specific message must cater to these variables.



## ...which leads to some unique considerations as you look to engage them

- Albertans are tired, uneasy, and pessimistic, but they also believe **arts and cultural experiences are important for the quality of life** within the community.
- These **negative emotions are largely tied to weakened personal economics** for many and general instability that is very prominent right now.
- But audiences also **recognize that arts and culture are essential to their community**—offering an opportunity to escape negativity, feel connected, and experience joy.
- 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.
- Remember, Albertans are busy and stressed. As they look for things to do, **they want to know exactly what to expect, and how much it's going to cost**. Be upfront and make it easy.
- **Passive audiences are naturally less informed** than those who are more engaged. They also tend to receive and retain information differently. Building basic awareness with more direct and traditional media like community signage, news media, and billboards will be important.



AUDIENCE

# What does this mean for arts organizations?

**While this is a period of significant uncertainty, there are real opportunities for enhancing your marketing and engagement activities. Those that build relationships with their audience now are most likely to grow when things are more stable and positive.**

- 1. Be empathetic:** The audience is in a difficult spot and marketing choices need to take this into consideration. Recognize they are likely to respond best to those messages and opportunities that alleviate their current state of mind. Comfort, reassurance, levity and appealing to their motivations will be key.
- 2. Be nimble:** Conditions are changing quickly. Consider a strategy that incorporates room for timely messages that can reflect external conditions and resonate with audiences.
- 3. Getting the attention of passives:** Your loyal audiences are likely only going to need a reminder. Reaching new and passive audiences are going to need more – it will be important to get their attention first with media that can reach – radio and out-of-home can be cost-effective for achieving this.
- 4. Continuing the focus on simple sequences of messages:**
  - ✓ Show the experience and benefits first. This is not the activity. This is what people will feel, experience or get out of the engagement.
  - ✓ Make the value clear: financial stresses are paramount right now. Show value, promotions or offers that can incent audiences who may have less to spend. (Perceptions of good value will climb when this follows the promise of experience and benefits.)
  - ✓ Make it easy: Build on findings from the last wave and make their planning easy – give the information they need to have a hassle-free experience. This can help audiences with limited time to invest.
  - ✓ Help them see themselves in the activity: This is where you can show the activity – but where possible put them in it.

- 1. Take a holistic approach to the experience:** Audiences – particularly the passive ones, are there for more than the artistic offer. Their motivations are broader and want the whole experience: escape, social, emotional, etc. Critically review the ENTIRE experience from early stages of planning to going home afterwards and identify any features that inhibit their motivations and strive to address them.
  - For example: Digital tools that make it difficult to plan create frustration and inhibit experiences.
  - For example: line-ups that increase angst or cause patrons to wonder if they will have enough time to be served create uncertainty. (The uncertainty they are looking to escape from.) That has a negative impact on experiences.
- 2. Adjust experiences to reflect motivations for different kinds of activities:** People will engage with different types of experiences for different reasons – identify how you can cater to those.
  - Recognize those that want to DO (arts education, creation) are mostly looking for escape, novelty and social.
  - Those ATTENDING (performances, events, festivals) are looking for social, positive and escapist benefits.
  - Those simply OBSERVING (media, galleries) are there for contentment and relaxation.

# What is different outside of Calgary and Edmonton this winter?

**While many Albertan's have similar thoughts and perspectives around arts and culture in their own communities, regional Albertan communities some views that differentiate them.**

- 1** While financial stress seems greater for regional Albertan's, their quality of life remains among the average. This could be due to their optimistic nature, which is highest for this group. But similar to the rest of the province, they are still reporting feeling tired, nervous and annoyed.
- 2** Likely due to the distance between their communities and the metro areas, which is where many of the renowned arts experiences are located, there is a barrier to these community's that cities like Edmonton and Calgary don't have, which is to travel for these experiences. This means that these residents tend not to believe there are arts and culture experiences to enjoy in their own community, and that travelling to a destination becomes part of the total experience.
- 3** Regional Albertan's are community focused, and while social media, word of mouth, and news media are all valid sources of information, these communities more than others tend to view sources from community publications and neighborhood signage.

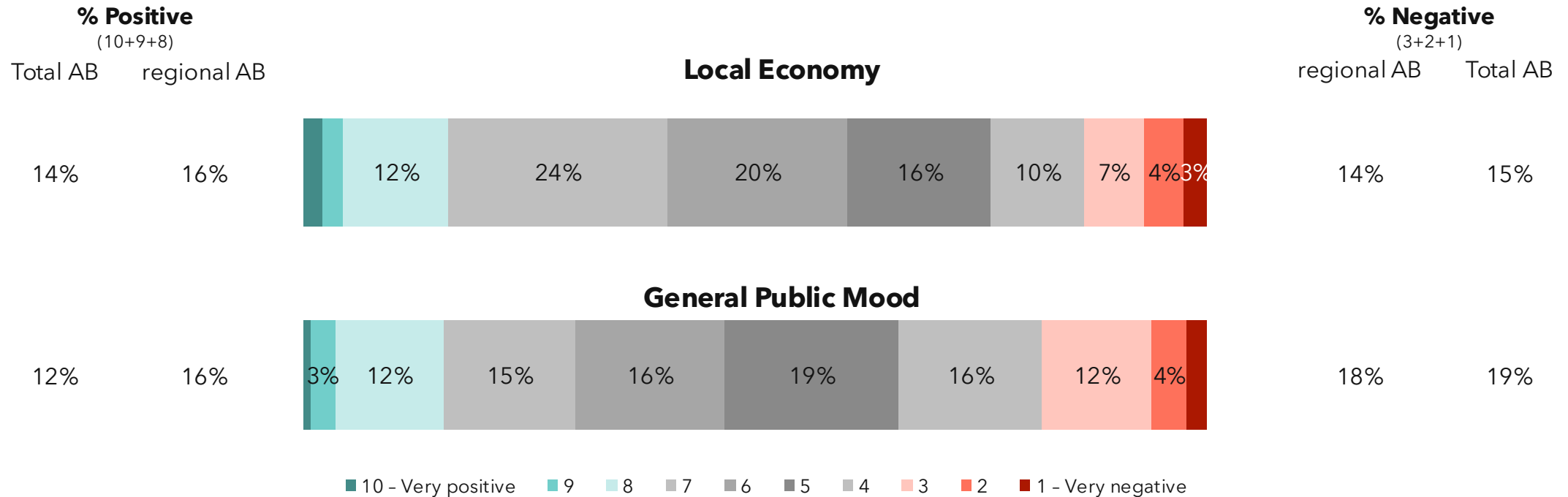
A photograph of two men in a presentation room. One man in a blue shirt is pointing towards a screen, while another man in a light-colored shirt stands behind him. The screen displays faint, illegible text. The overall scene is dimly lit, with the men's silhouettes visible against the bright screen.

# Understanding Community Sentiment

# The majority of regional Albertans have a neutral, general mood



This is similar to all Albertans and suggests a level of ambivalence in the current state. Residents may be taking a pragmatic approach as they deal with an uncertain future.

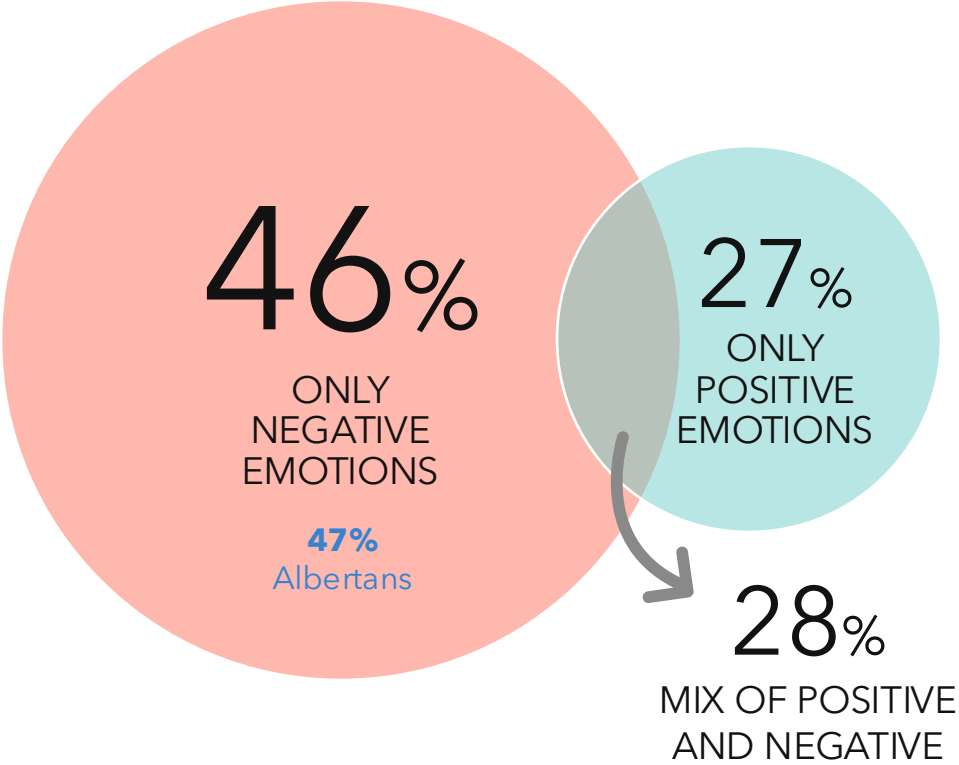


Base: regional AB respondents (n=360); Albertan respondents (n=1,160)

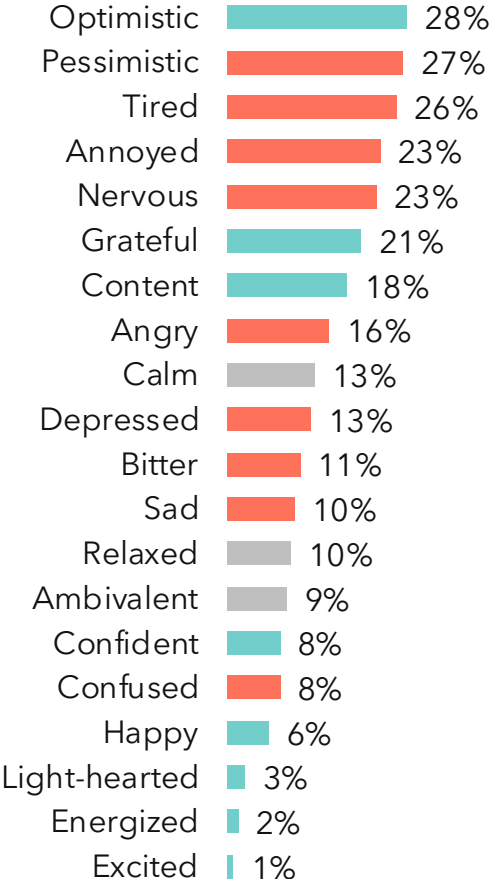
Q10. Using a scale of 1 to 10 where 1 is very negative and 10 is very positive, how would you rate both the local economy and the general public mood in your community?

# While regional Albertans are the most optimistic group, levels of pessimism, tiredness, and annoyance can be seen throughout the province.

## Current State of Mind



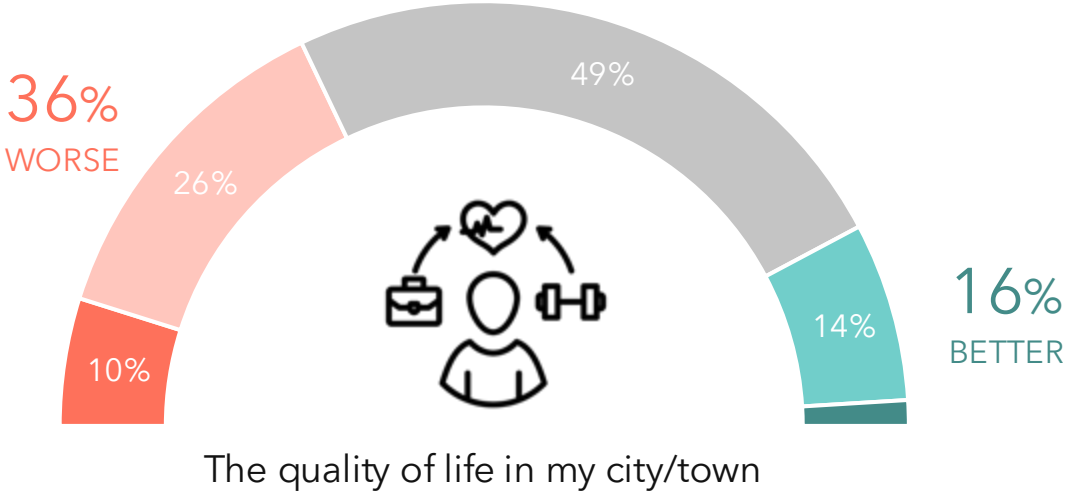
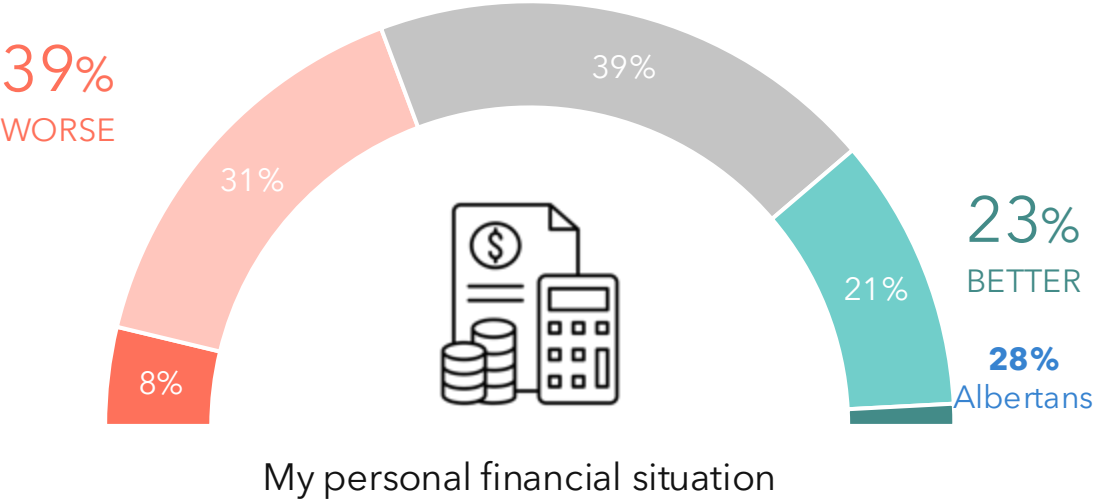
## Feelings Towards Life and Community



Base: regional AB respondents (n=360); Albertan respondents (n=1,160)  
Q11. When it comes to how you are feeling about life and your community in general, what word or words would you use to describe your overall mood? Select up to 3 choices (please scroll to see the full list)

And while quality of life is similar to much of the province, finances tend to be slightly more challenging in regions outside the metropolitan areas.

**Personal and Community Outlook**



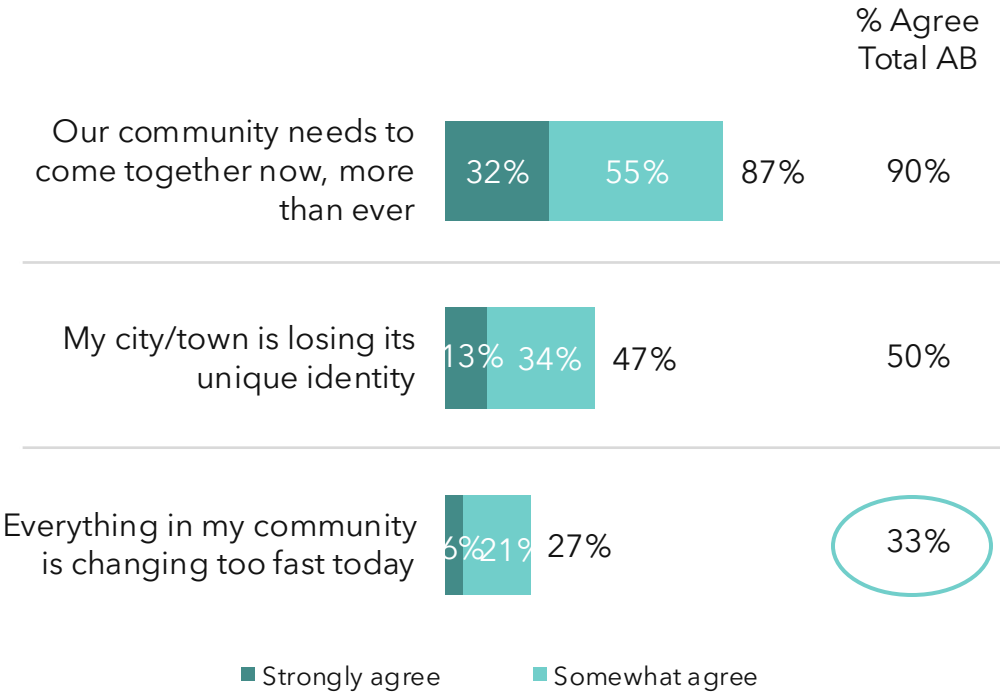
■ Get a lot worse ■ Get a little worse ■ Stay the same ■ Get a little better ■ Get a lot better

Base: regional AB respondents (n=360); Albertan respondents (n=1,160)  
Q12. Now thinking ahead over the next year, how do you think things will be for the following for you and in your local community?

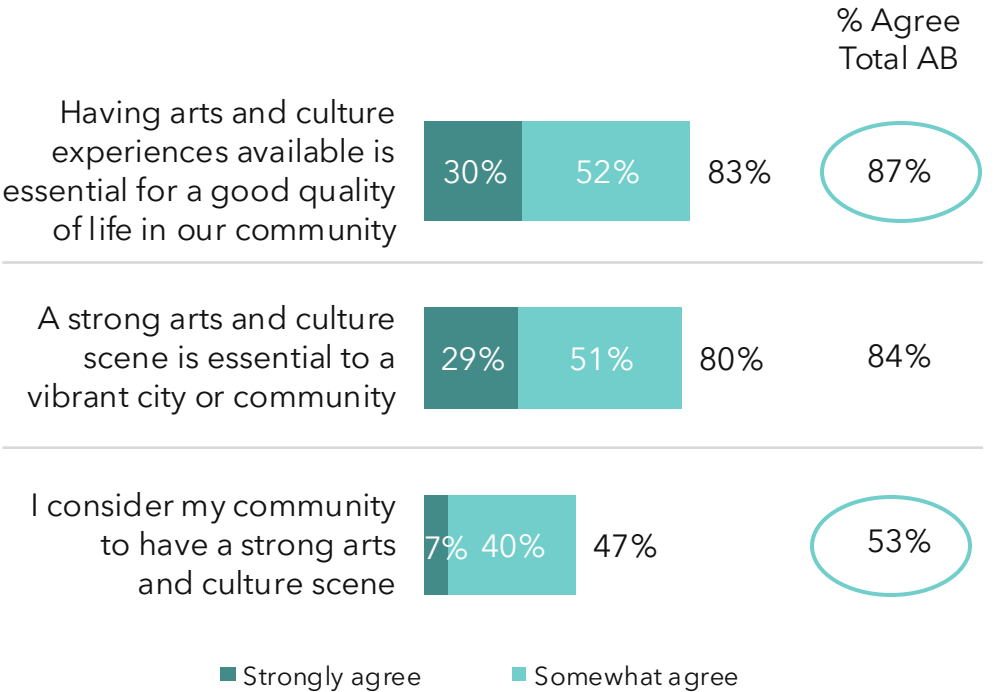


# General community perceptions are similar, but perception specific to the arts is more restrained.

## General Community Perceptions



## Perceptions of Arts and Culture in Community Today



Base: regional AB respondents (n=360); Albertan respondents (n=1,160)  
Q13. Below are a series of statements that could be made about your community and things to do. Please indicate if you agree or disagree with each statement

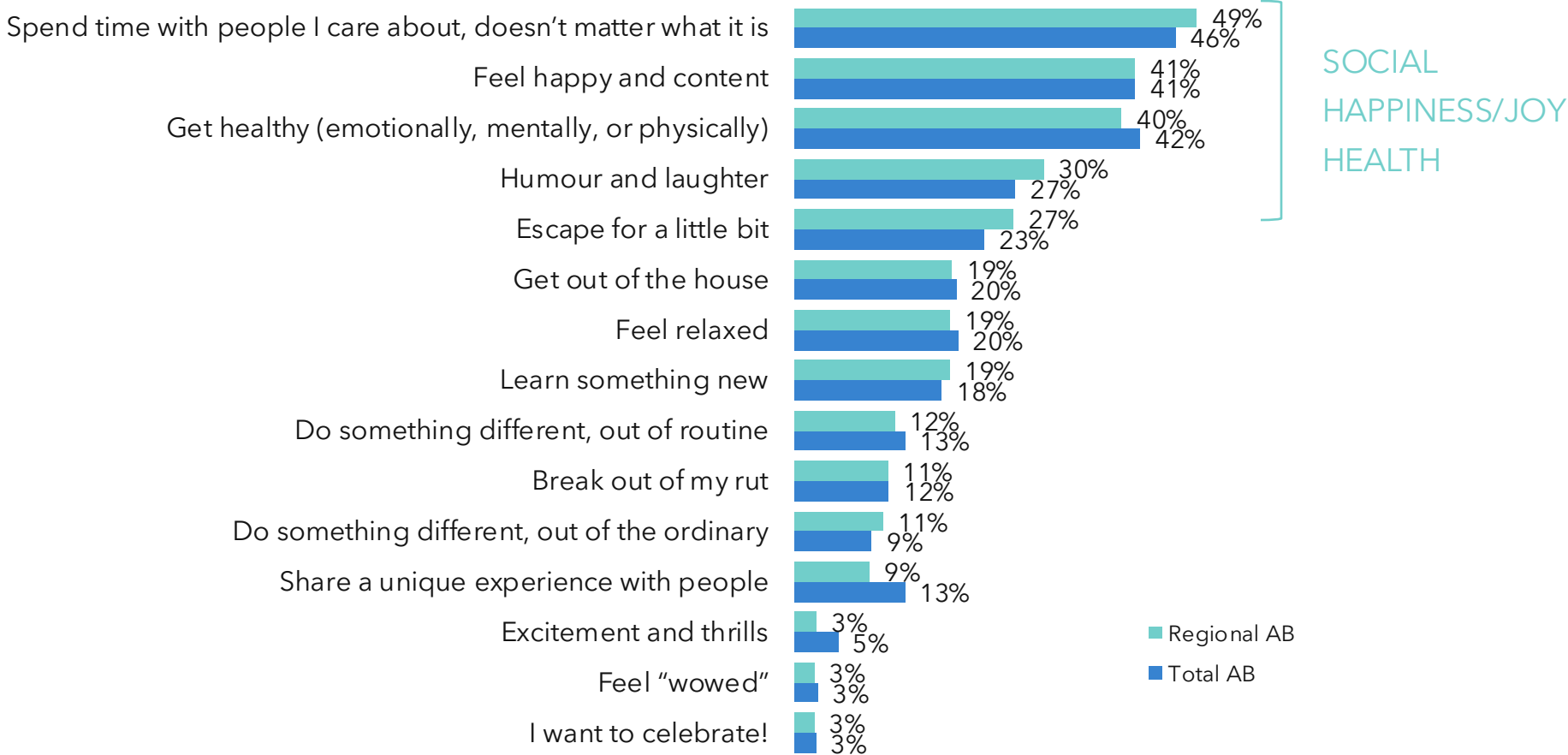
A photograph of a music rehearsal space. In the foreground, there are two keyboards on stands, a stool, and a bass guitar on a stand. The background features a stage with a red and white checkered floor, a large window frame hanging from the ceiling, and a stage with a red and white checkered floor. The lighting is dim, with spotlights illuminating the stage. The text "What benefits can the arts provide?" is overlaid in white on the left side of the image.

**What benefits can the arts  
provide?**

# Desired outcomes are similar across the province; most look for social benefits and positive emotional relief

## Desired Outcome From Activities

RANKED TOP THREE



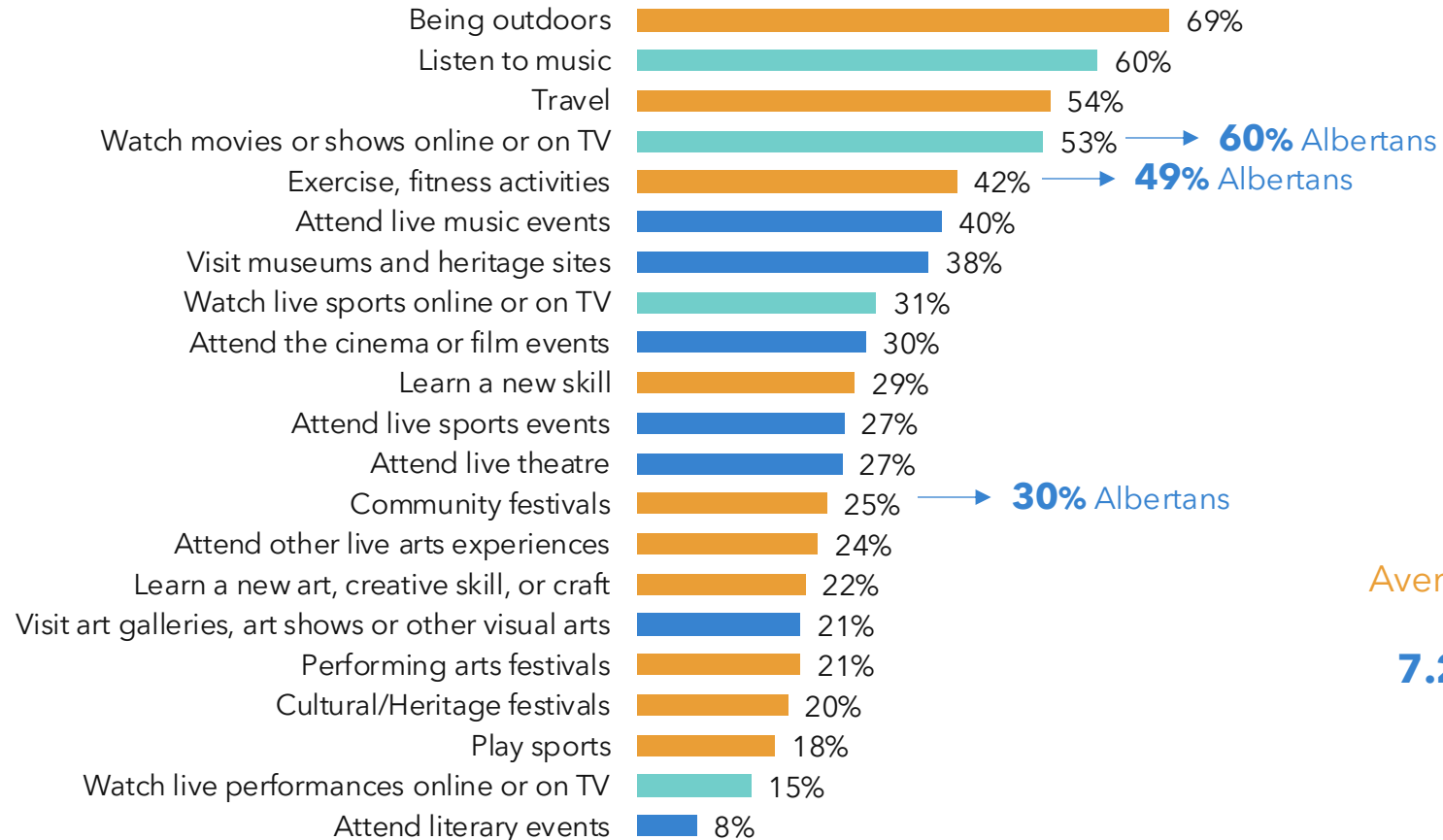
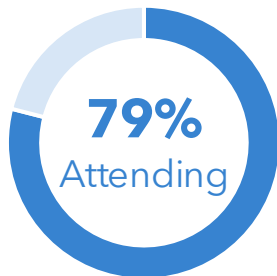
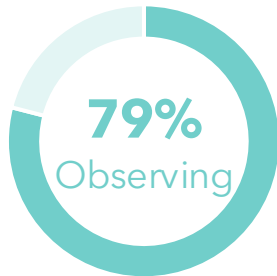
Base: regional AB respondents (n=360); Albertan respondents (n=1,160)

Q14. When you think about doing activities that you love to do, what are the things you MOST want to feel or get out of the activity, given your current mood right now? Select and rank up to three, in order of importance with 1 being the most important thing you want, 2 being the second most important, and 3 being the third most important - 1 + 2 + 3

# To achieve social and emotional outcomes, regional communities engage in a variety of activities

Regional Alberta tends to engage in fewer activities in general but are more likely to be outdoors.

## What are Albertans doing outside of city centres?



6.7  
Average activities

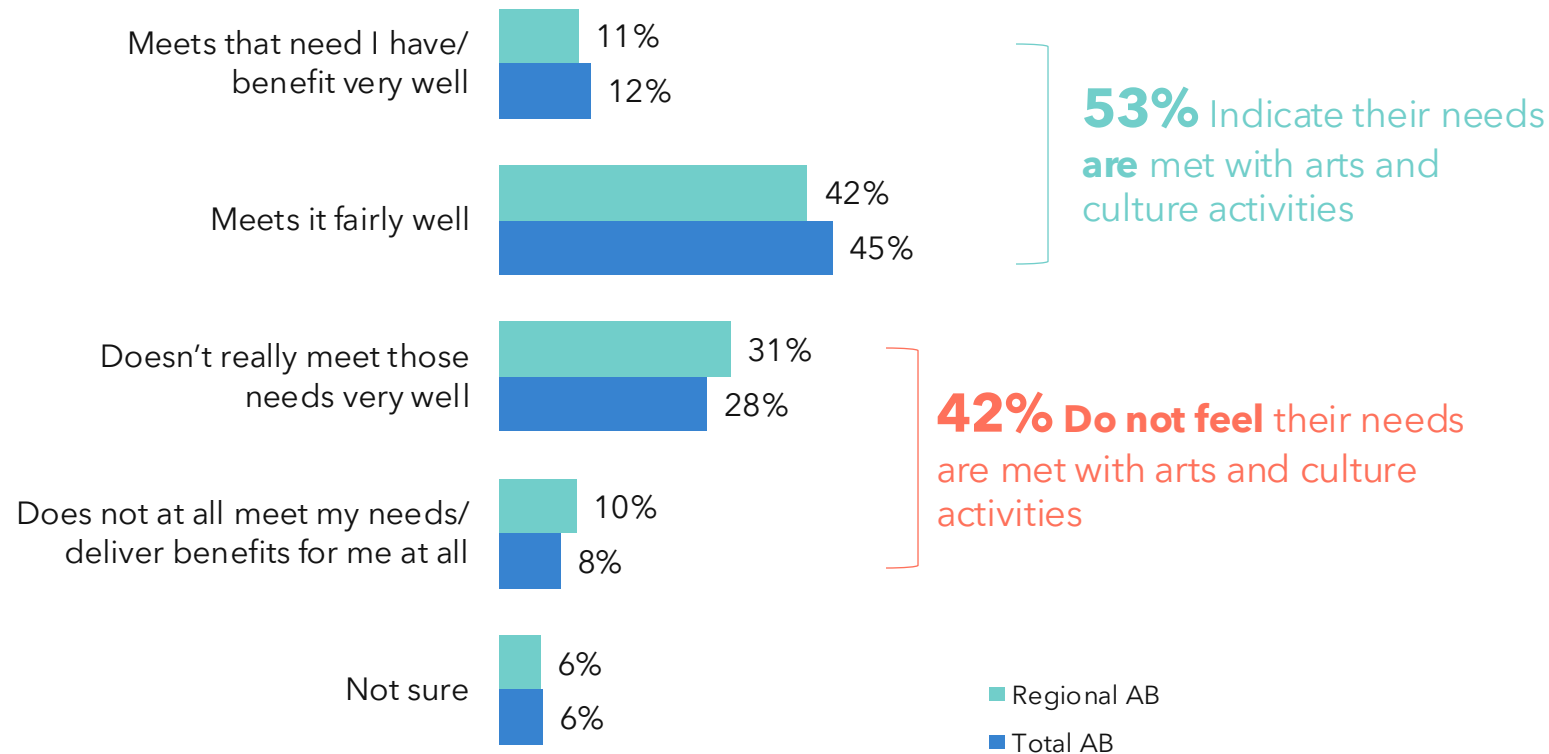
7.2 Albertans

Base: Selected at least one activity at Q14 - regional AB (n=354); Albertans (n=1,148)

Q15. What types of activities do you regularly do to achieve the outcomes you selected (listed below)? Select as many as apply that help you get what you are looking for.

# There is a gap between the benefits regional Albertans seek from doing, observing, and attending and how well those needs are being met by arts and culture experiences

## Role of Arts and Culture to Achieve Outcomes

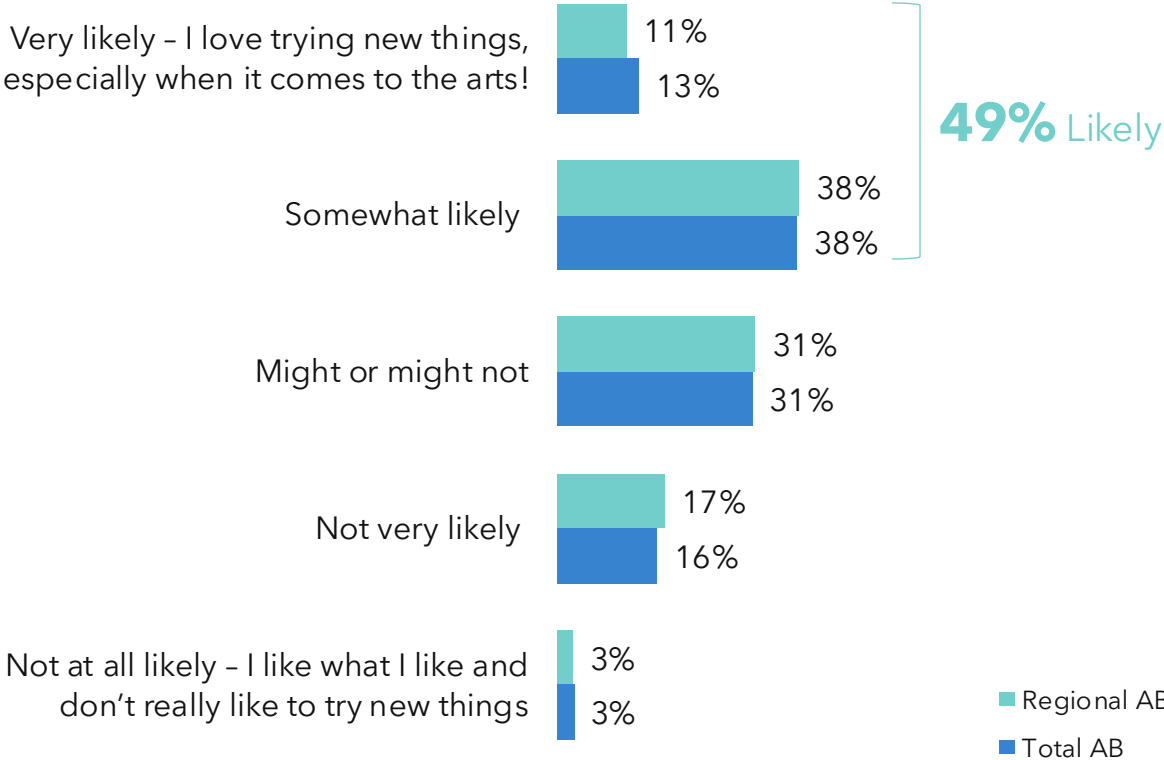


Base: Selected at least one activity at Q14 - regional AB (n=354); Albertans (n=1,148)

Q16. Earlier you indicated [ANSWER FROM Q14] was the most important thing you were looking to get out of the activities you participate in. Overall, how well do the arts and culture activities you engage in meet that need? This could be any arts and cultural experience, activity, event you participate in, or event you attend.

# But near half of regional communities are willing to try a brand-new arts experience

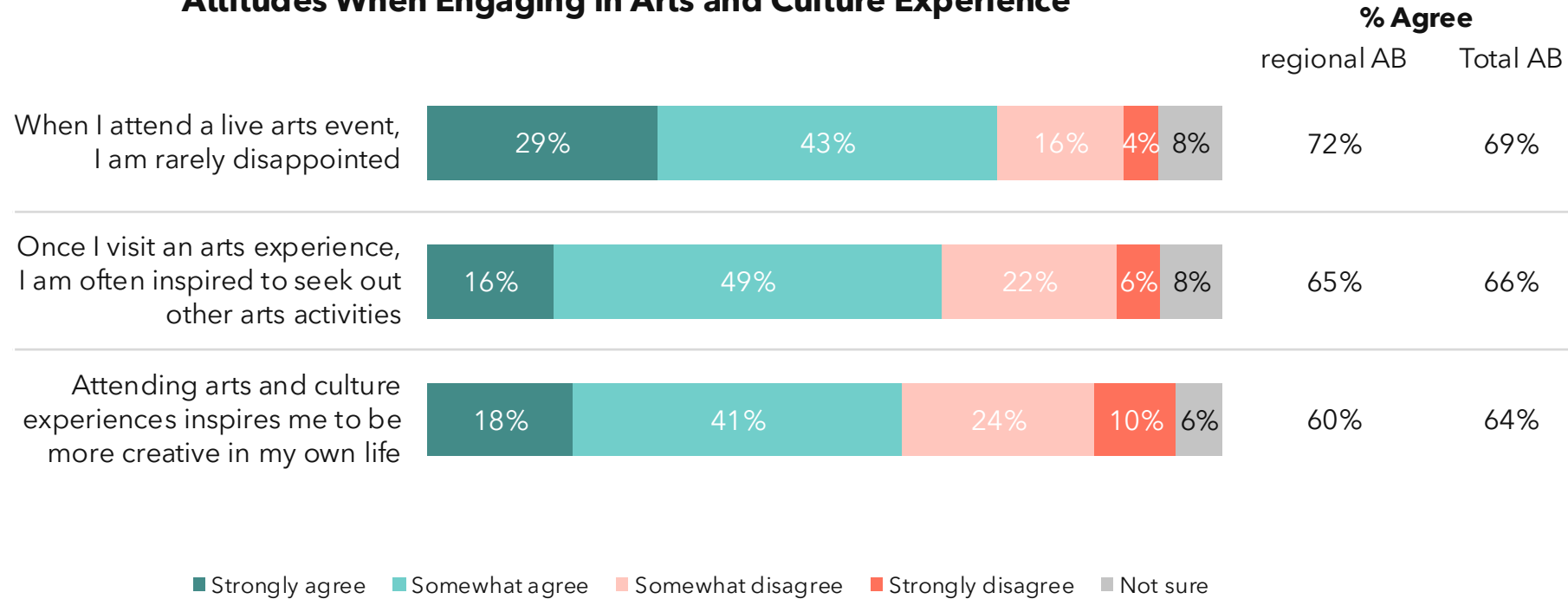
## Likelihood to Try a New Arts Experience



Base: regional AB respondents (n=360); Albertan respondents (n=1,160)  
 Q18. How likely are you to try a brand-new arts experience (a show, exhibit, or even a new art form) that you have never done or seen before?

# Most regional Albertan's report that they are rarely disappointed when the decide to attend a live arts event

## Attitudes When Engaging in Arts and Culture Experience



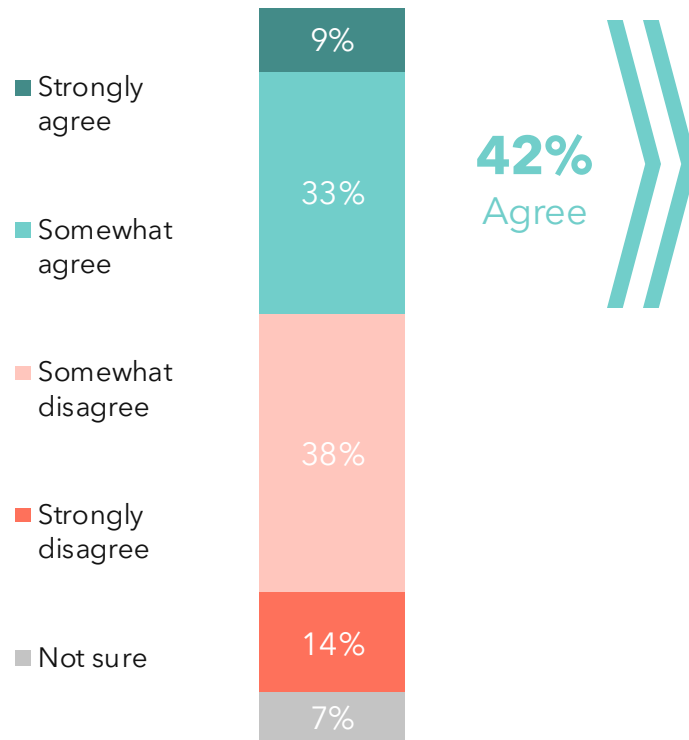
Base: regional AB respondents (n=360); Albertan respondents (n=1,160)

Q19. Below are a series of statements about arts and culture related experiences. Please indicate your level of agreement with each statement

# The lack of knowledge is a barrier for some in regional communities

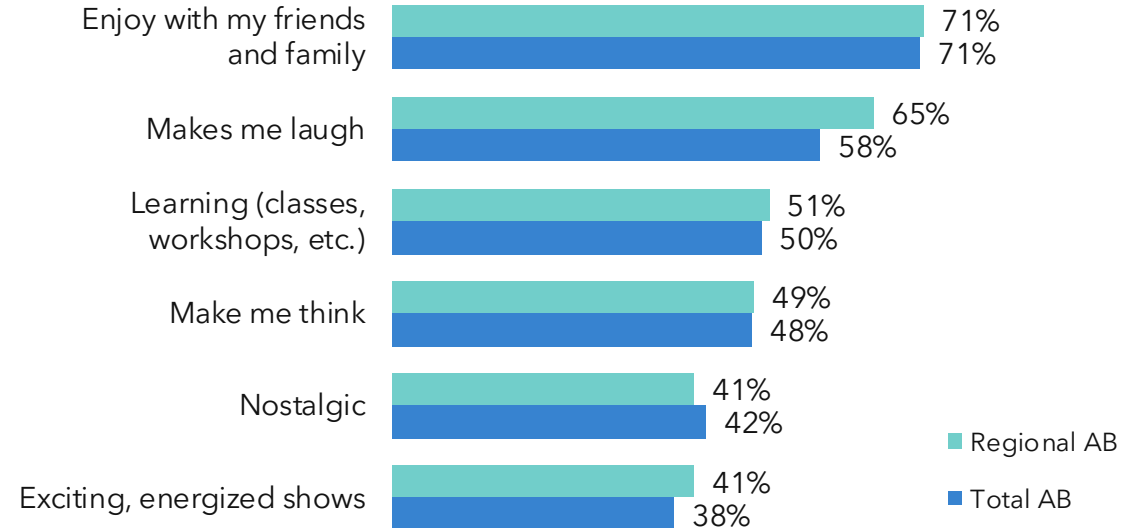
Of those who don't know where to start, messages about social enjoyment and humour are most appealing.

## I would like to engage with the arts more, but I just don't know where to start



## What would be appealing to those who want to engage more?

(selections of 40% or more)

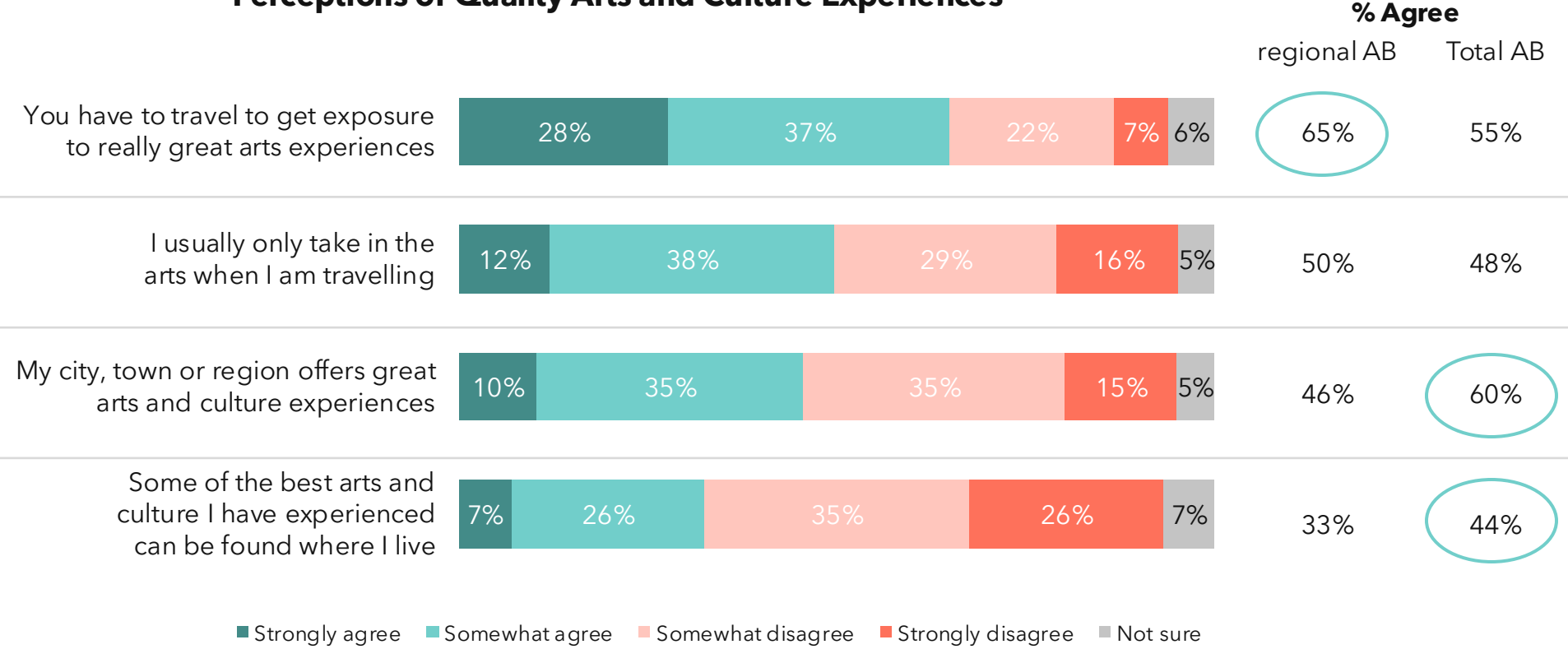


Q19. Below are a series of statements about arts and culture related experiences. Please indicate your level of agreement with each statement Base: regional AB respondents (n=360); Albertan respondents (n=1,160)  
 Q20. Which of the following arts related experiences are most appealing to you personally and would be something you would want to engage with more? Select all that apply. Base: Want to engage, but don't know where to start - regional AB respondents (n=150), Albertans (n=556)



# Not surprising for communities in rural areas, attending an arts experience is more likely to have a travel component, creating a barrier those in metro areas may not have

## Perceptions of Quality Arts and Culture Experiences



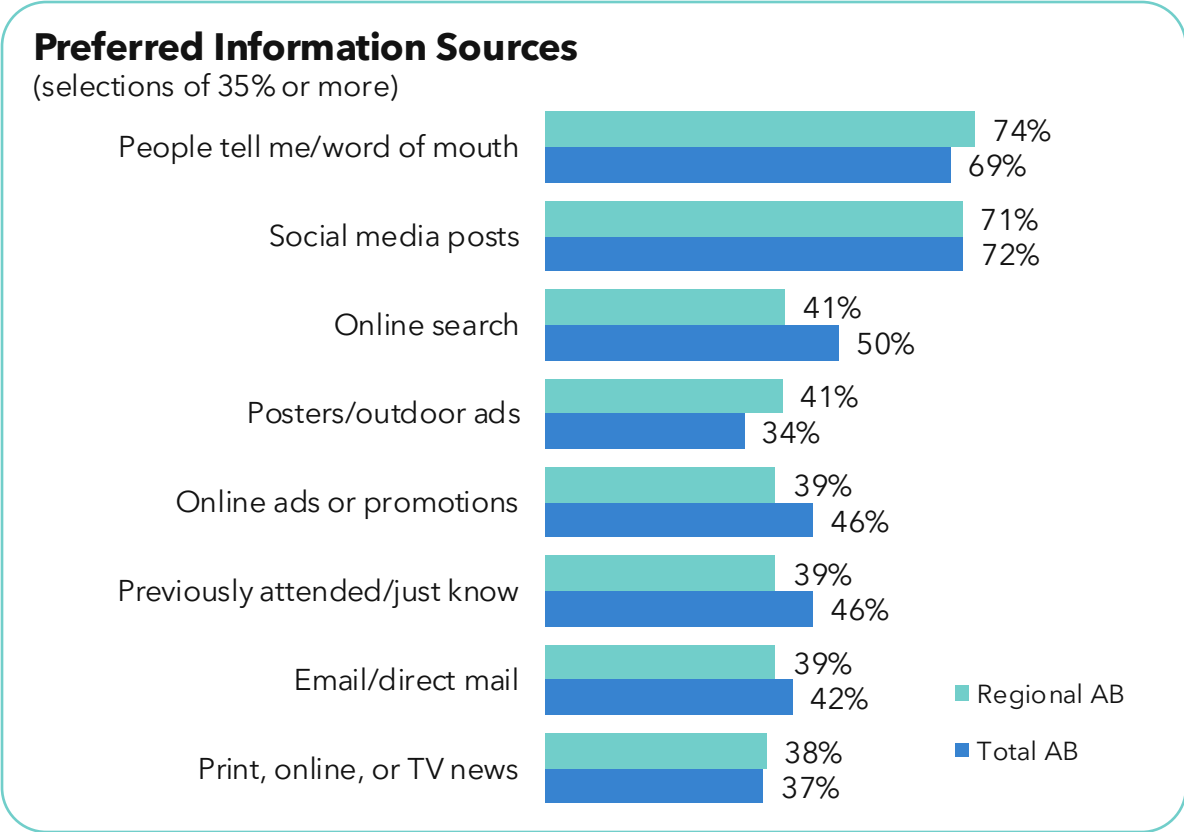
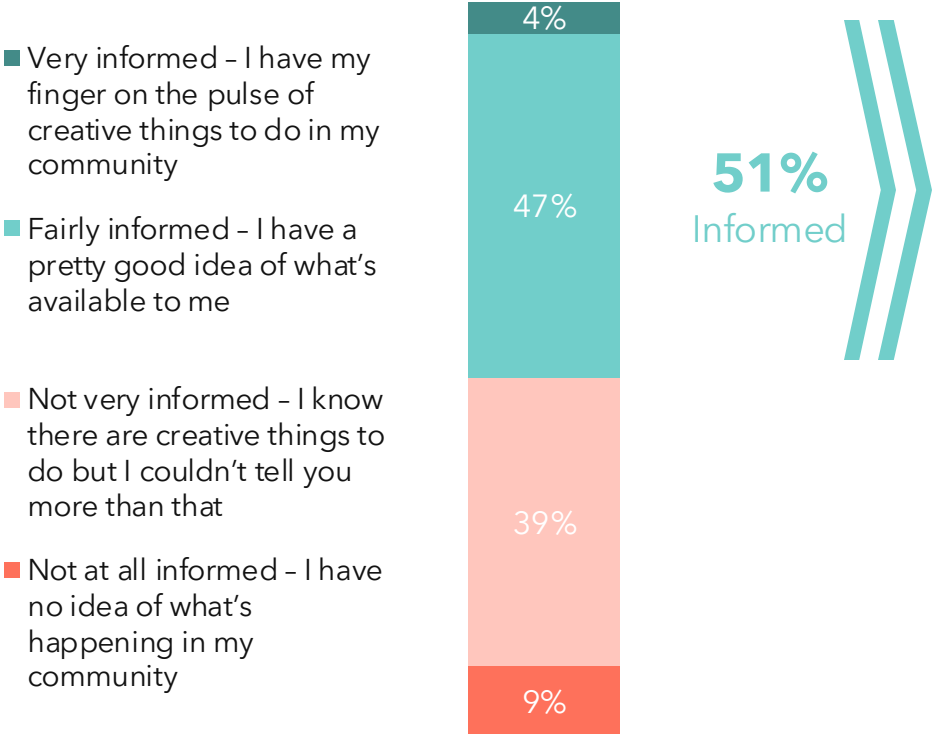
Base: regional AB respondents (n=360); Albertan respondents (n=1,160)  
 Q19. Below are a series of statements about arts and culture related experiences. Please indicate your level of agreement with each statement

# Informing and Inspiring Audiences



# For regional Albertan’s who consider themselves “in the know”, they rely on social media and WOM to hear about upcoming experiences

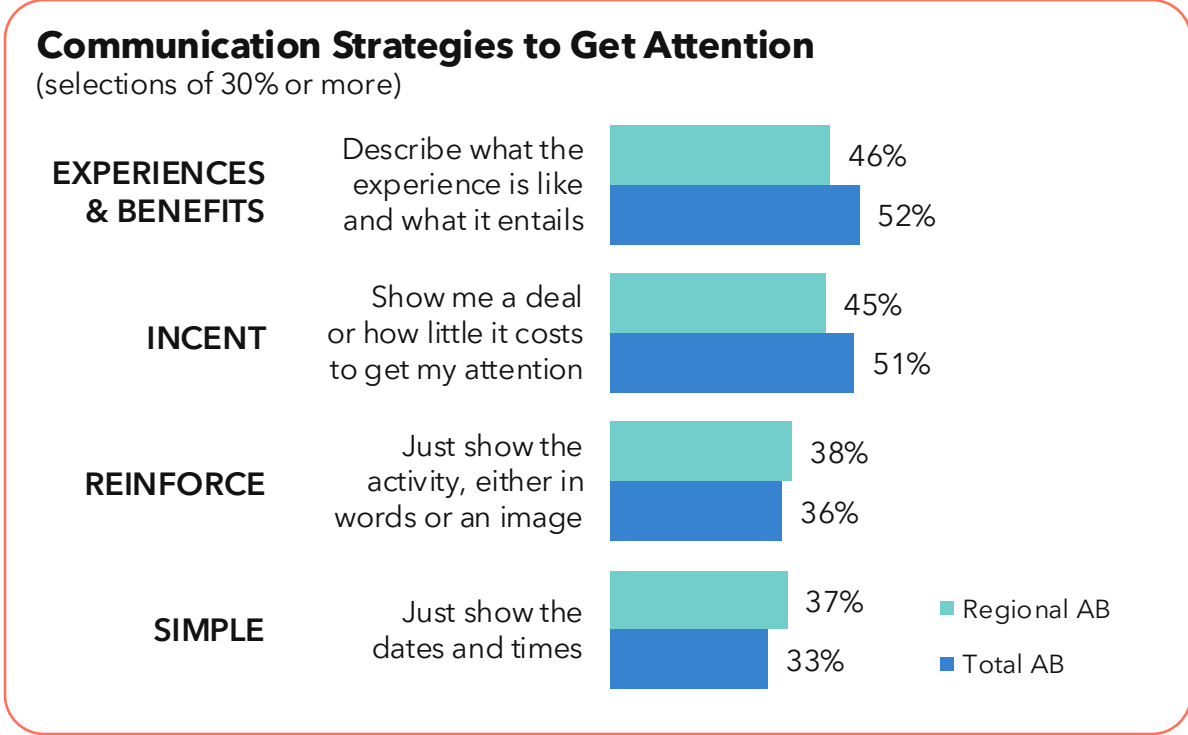
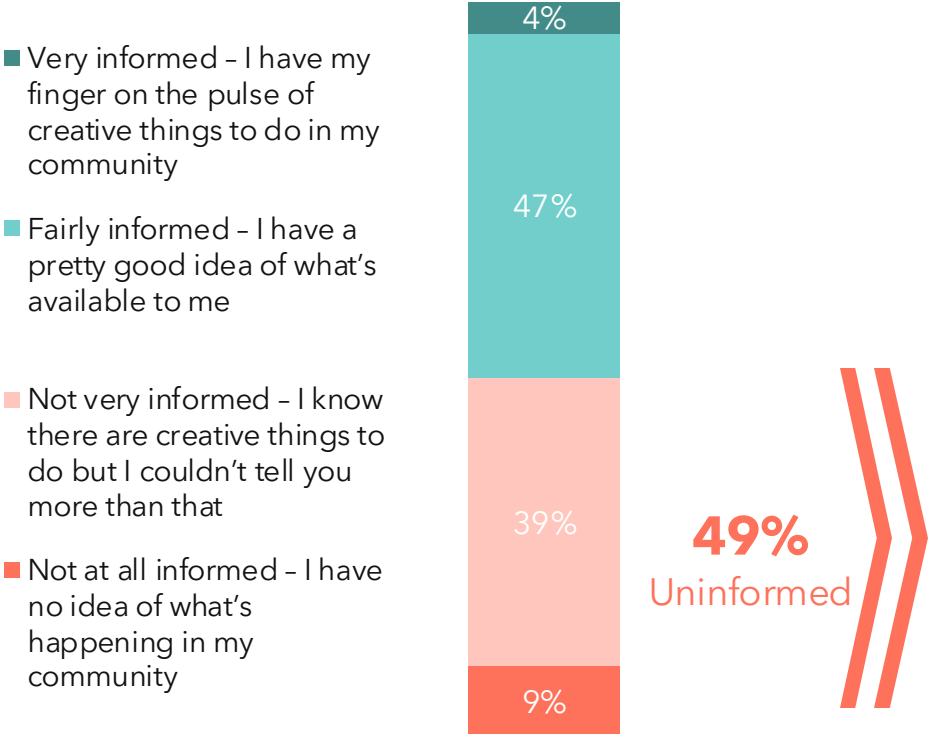
## “In the know” on Arts and Culture Experiences



Q21. When it comes to arts and culture experiences, how informed or 'in the know' do you consider yourself to be? Base: regional AB respondents (n=360); Albertan respondents (n=1,160)  
 Q22. Where do you get your information on what experiences and activities are happening in your community? Select all that apply. Base: Informed on arts and culture experiences - regional AB (n=185); Albertans (n=570)

# For those less informed, there is a need to communicate basics: lead with the promise of experience, benefits and value

## “In the know” on Arts and Culture Experiences

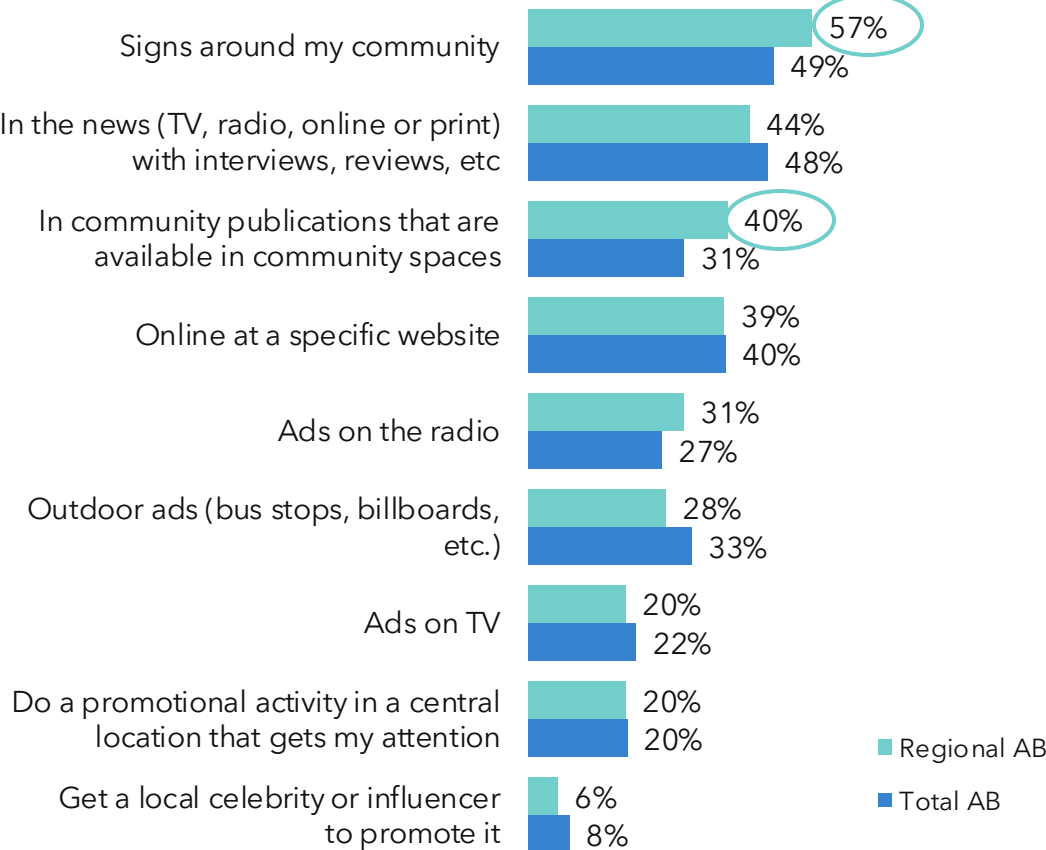


Q21. When it comes to arts and culture experiences, how informed or 'in the know' do you consider yourself to be? Base: regional AB respondents (n=360); Albertan respondents (n=1,160)  
 Q23. If a company wanted to get your attention about an activity, event or experience, what would they have to do or say? Please select up to three. Base: Uninformed on arts experiences - regional AB (n=175), Albertans (n=590)

# Where to capture attention (awareness)? And what can be leveraged for the consideration phase?

Regional Albertan's tend to be more aware of traditional marketing communications like community signs or news. They also tend to find information in community publications more often than others in the province.

## Channel Strategies to Get Attention



## Elements to Entice Final Decisions to Participate



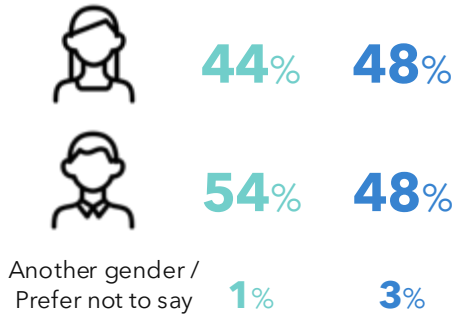
Q24. If an arts company that you didn't know about wanted to make you aware of a remarkable experience, where would they be most likely to get your attention? Select all that apply.  
 Q25. What should organizations be doing to finalize your decision to spend your time or money with them? Select up to three choices. Base: regional AB respondents (n=360); Albertan respondents (n=1,160)

# Respondent Profile

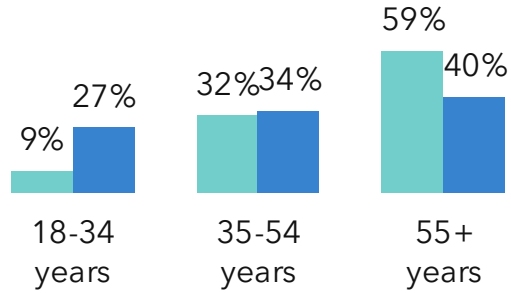


# Respondent Profile

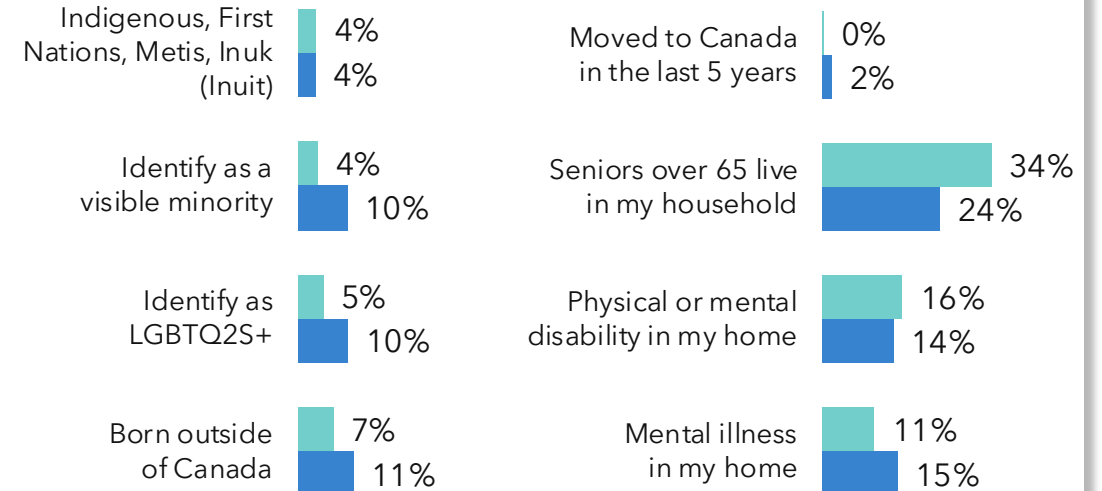
## Gender



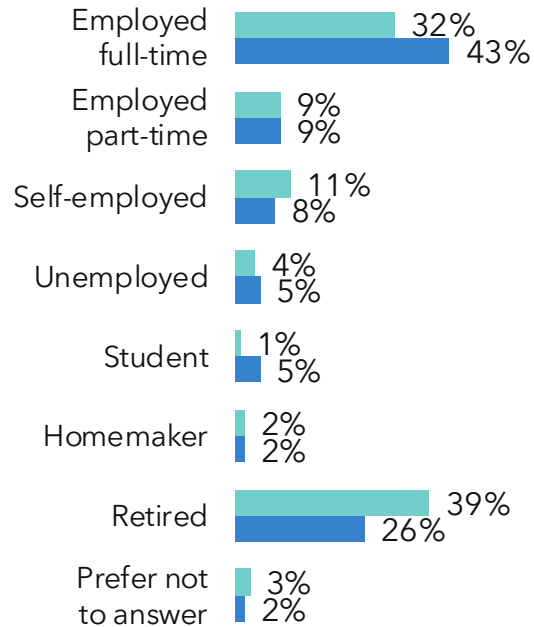
## Age



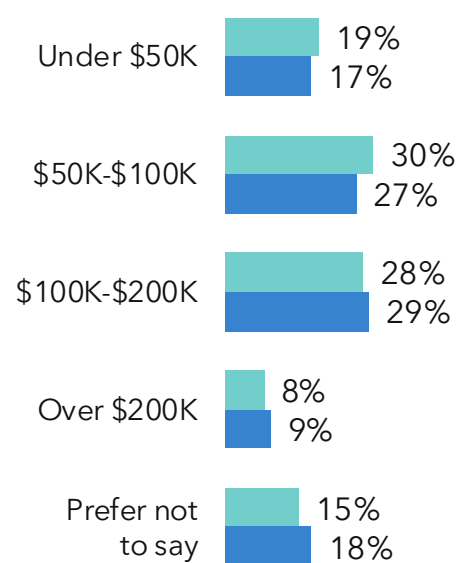
## Diversity / Identity



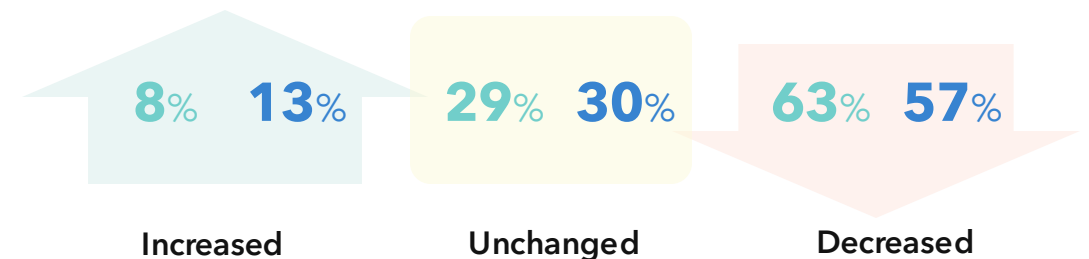
## Employment



## Household Income



## Income Change PAST THREE YEARS



■ Regional AB ■ Total AB

# Understanding people.

It's what we do.

**Stone —  
Olafson**

**Questions or Comments?**

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