

Spotlight on Arts Audiences

Wave 4: Winter 2025

Alberta 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.**



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A collaborative and evolving resource

Purpose and 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.

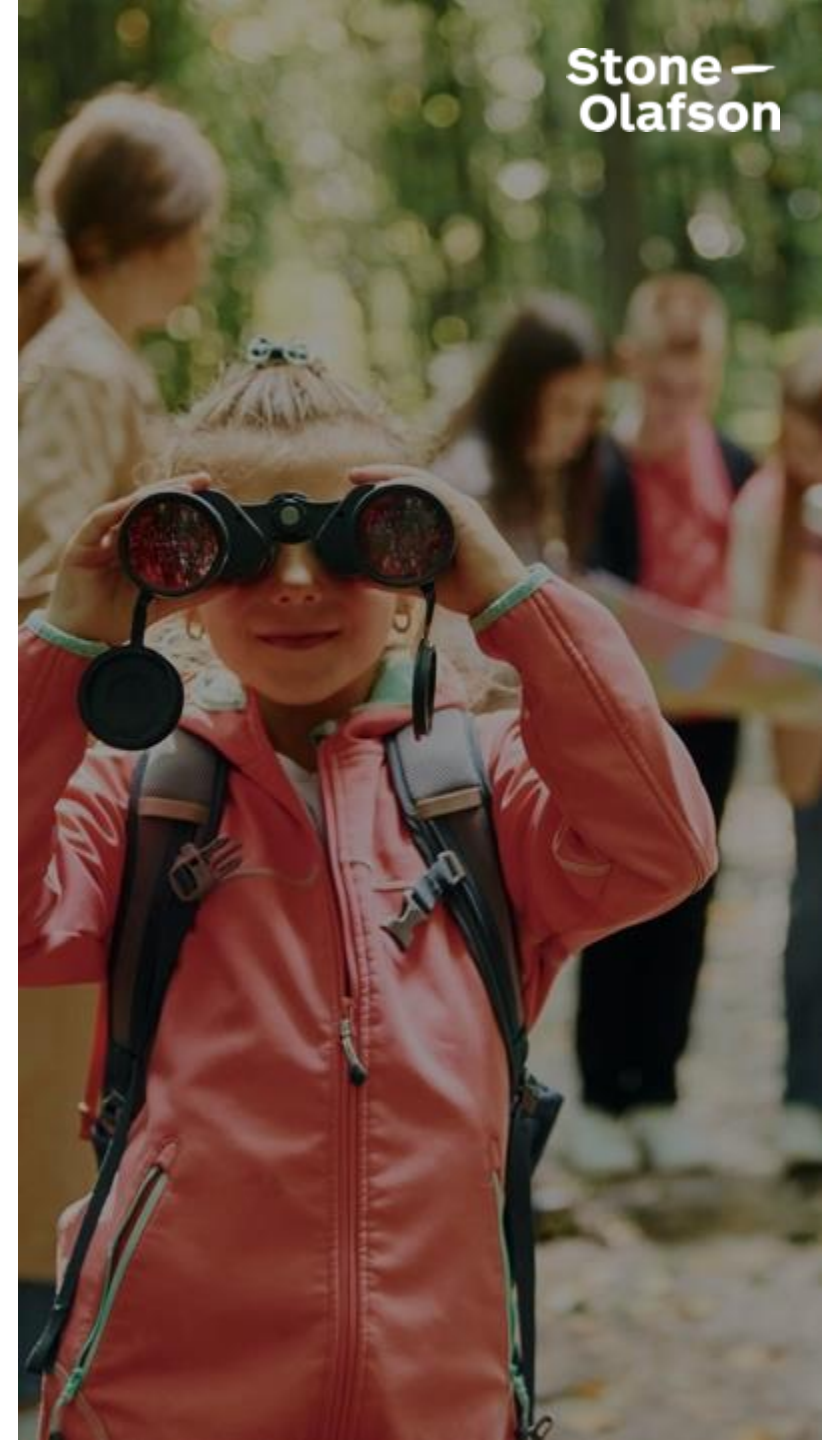
A total of n=1,160 surveys were collected across the following regions:

- Calgary + area (n=400)
- Edmonton + area (n=400)
- Northern AB (n=120)
- Southern AB (n=120)
- Central AB (n=120)

The survey was conducted between January 17th - 27th, 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).

For the purposes of this report, the focus is on the full market. Results are not weighted to population but are instead designed to provide a directional overview of province-wide trends. Breakouts by region are provided where relevant and regional reports for Edmonton, Calgary and other markets will be made available.



A photograph of three young women sitting on a grassy lawn outdoors. They are engaged in a study session. The woman on the left is wearing a white hoodie and has her back to the camera. The woman in the middle is blonde, smiling, and looking towards the woman on the right. The woman on the right has long brown hair and is wearing a denim jacket, looking back at the blonde woman. They are surrounded by books and papers. The background shows trees and a fence, suggesting a campus or park setting.

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.

A woman with blonde hair is holding a black smartphone in her hands, looking at the screen. She is in a kitchen setting. In the background, there are two young children. One child on the left is looking towards the camera, and another child on the right is holding a glass and looking down. The scene is softly lit, suggesting an indoor home environment.

Understanding Community Sentiment

Albertans may be keen to take part in experiences, but economic uncertainty remains

- While half of respondents are at least in a good financial position, almost 60% believe their spending power has decreased in the last 2 years.
- Those who tend to be most negative are also those who are struggling financially; 61% are either falling behind or just getting by. This is also true for 58% of younger Albertans (18-34).
- While the younger demographic feels they are having greater financial difficulty, those aged 35-54 are most likely to believe their spending power has diminished.
- The Albertan economy has had a difficult couple of years with high inflation and rapid population growth. These, among other factors, have caused feelings of unease.
- Though average wages in Alberta have been increasing, they have not kept up with inflation resulting in a net decrease in real weekly earnings*.

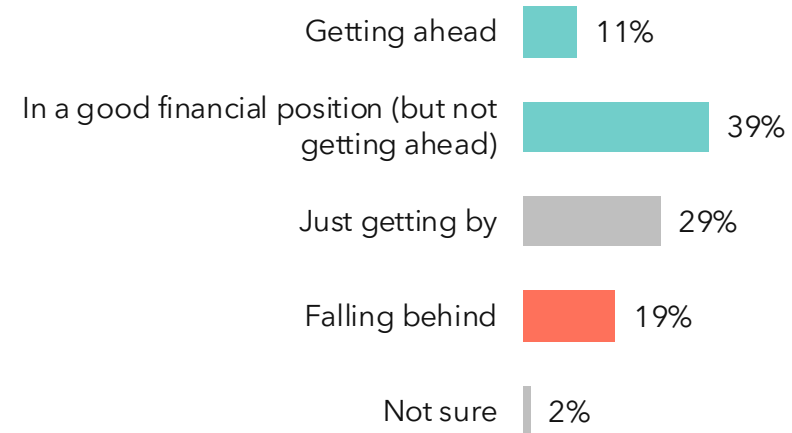
*Source: Centre for Future Work

Base: All respondents (n=1,160)

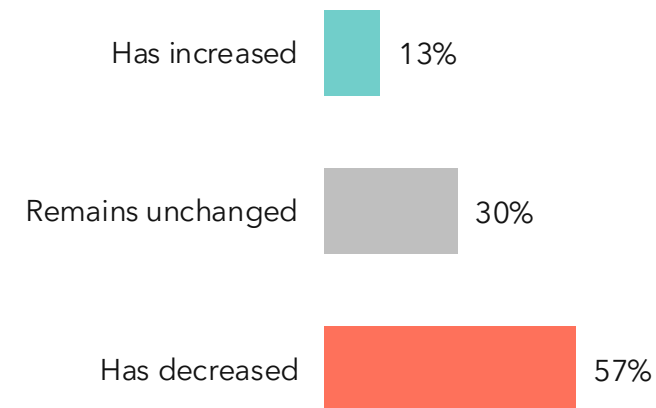
Q28. Thinking about your own financial situation and the overall cost of living, are you...?

Q30. Over the past two years, would you say your household's ability to spend on everything from household needs to discretionary items ...

Personal Financial Situation/Cost of Living

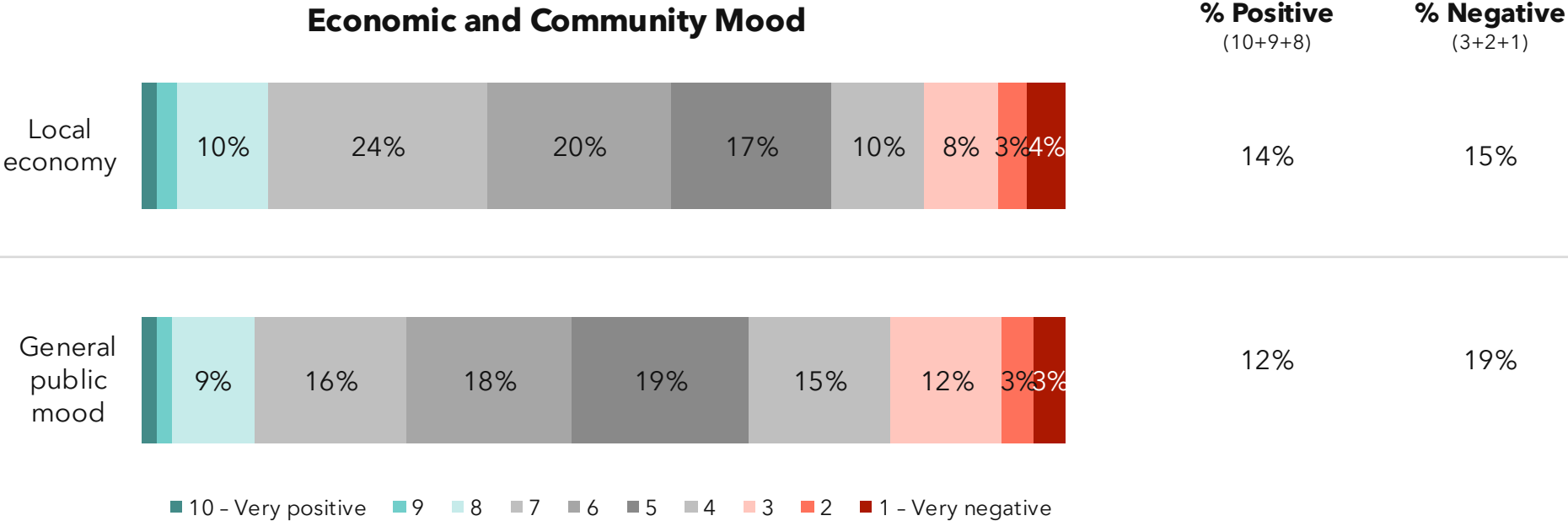


Spending Power in the last 2 years



The current mood in the province is muted

Most Albertans take a neutral stance on their local economy, mirroring the broader public mood. This suggests a level of ambivalence in the current state. Residents may be taking a pragmatic approach as they deal with an uncertain future.

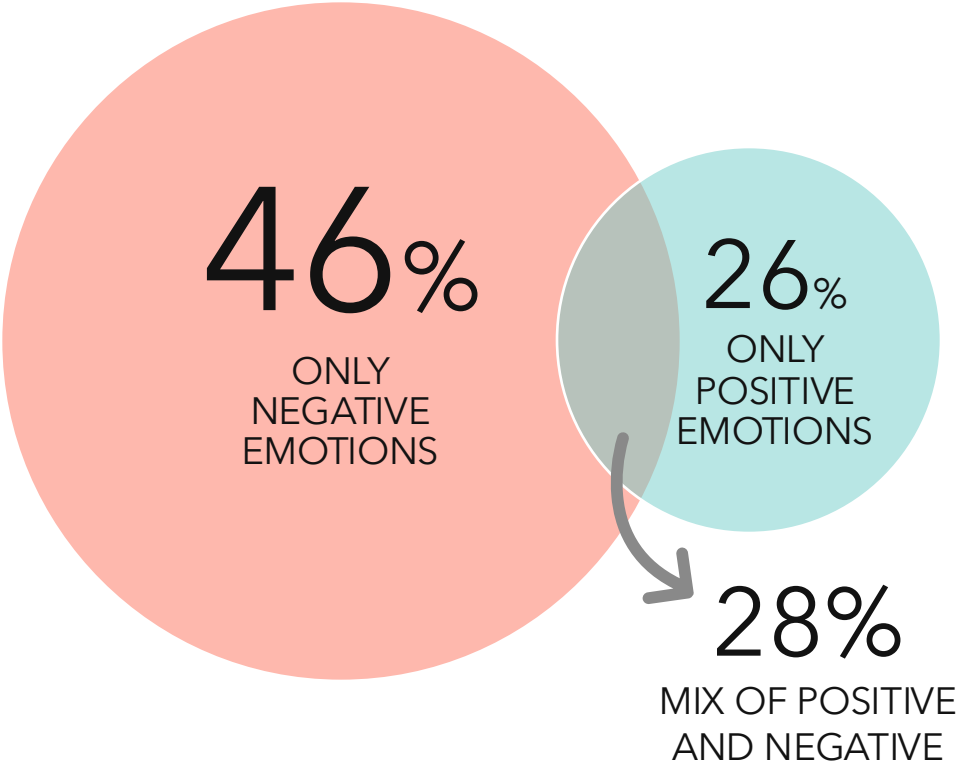


Base: All respondents (n=1,160)
 Q10.. Using a scale of 1 to 10 where 1 is very negative and 10 is very positive, how would you rate both the local economy and the general public mood in your community?

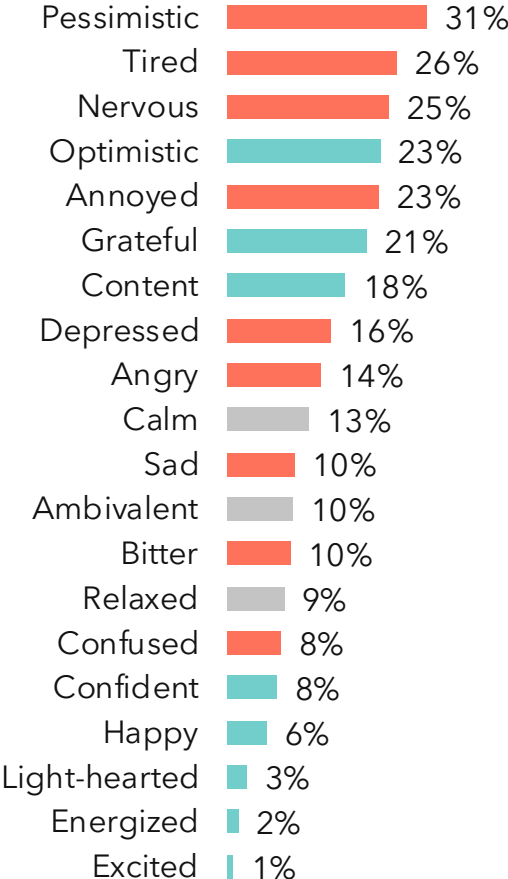
But a deeper dive suggests a more negative attitude

While most remain neutral about external factors like the economy and public attitudes, their outlook turns more negative when reflecting on their personal circumstances.

Current State of Mind



Feelings Towards Life and Community

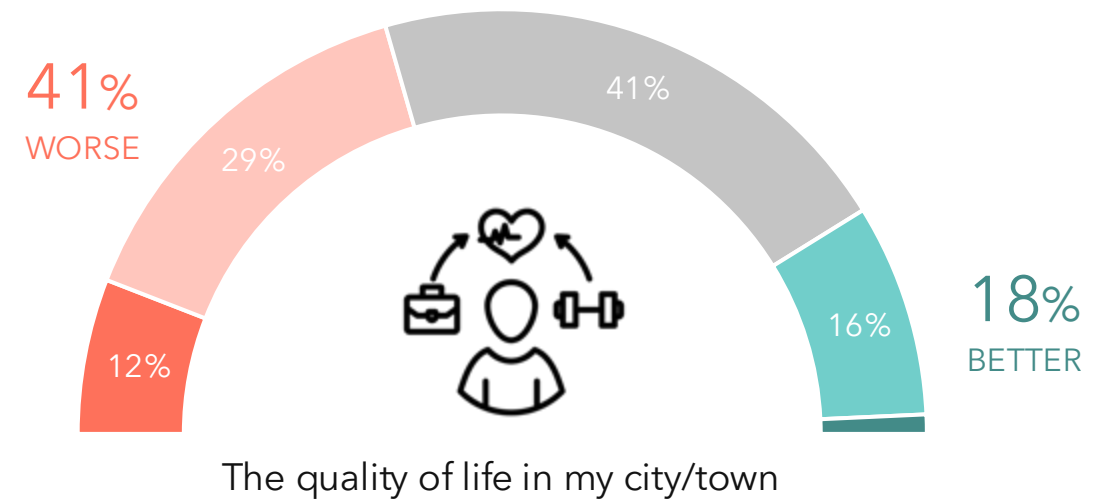
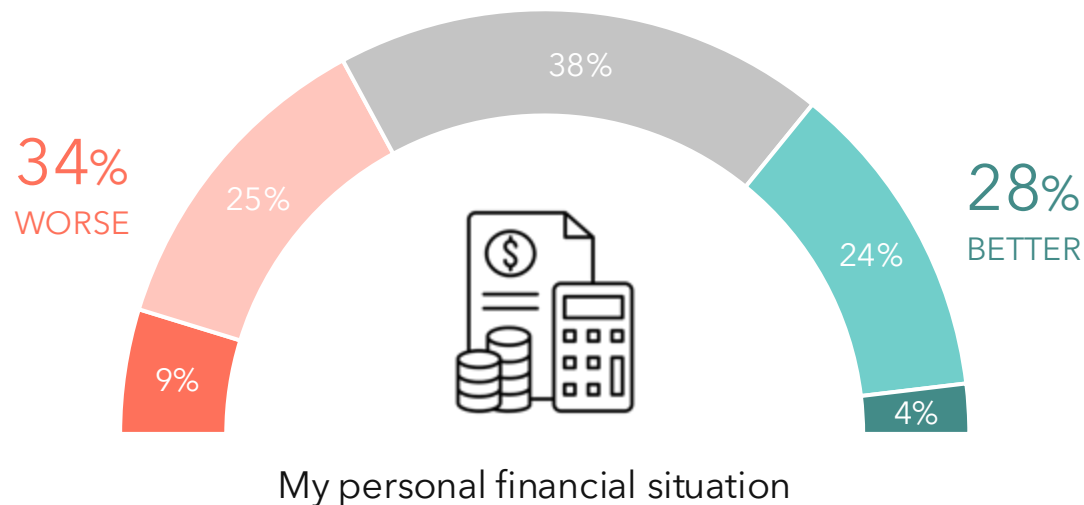


Base: All respondents (n=1,160)
Q11. When it comes to how you are feeling about life and your community in general, what word or words would you use to describe your overall mood? Select up to 3 choices (please scroll to see the full list)

And while there are pockets of optimism, more think quality of life and their finances will worsen instead of improve in the next year

Still, there are large proportions who see things staying the same – so there is an expectation of stagnancy in the coming year.

Personal and Community Outlook

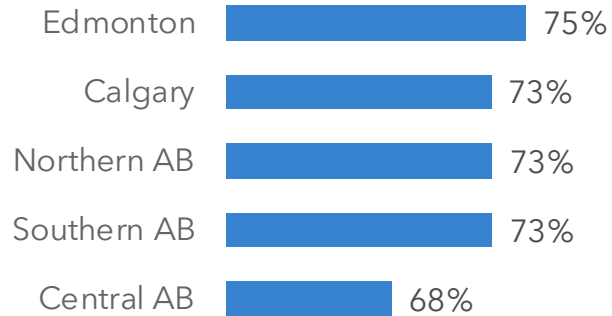


■ Get a lot worse ■ Get a little worse ■ Stay the same ■ Get a little better ■ Get a lot better

Who has a more negative outlook?

Younger individuals are slightly more negative but tend to become less so as age increases. Unsurprisingly, financial status relates to one's outlook, and those employed are often more negative than those who are either unemployed, retired, or a student.

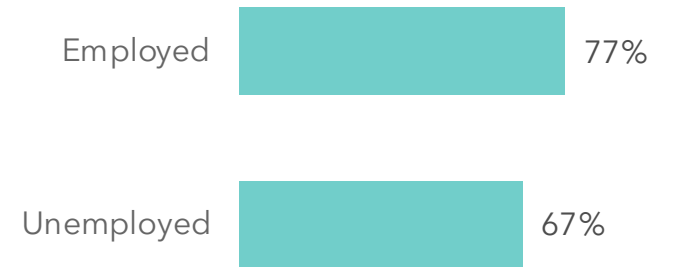
**Negative emotions:
By location**



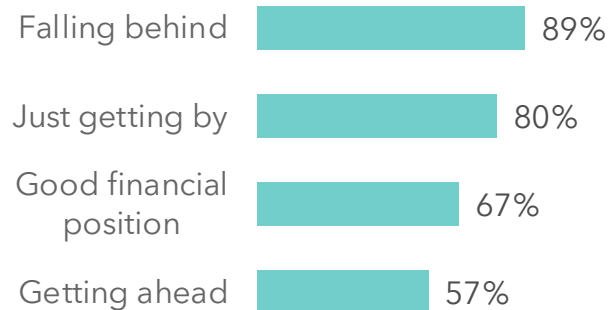
**Negative emotions:
By age**



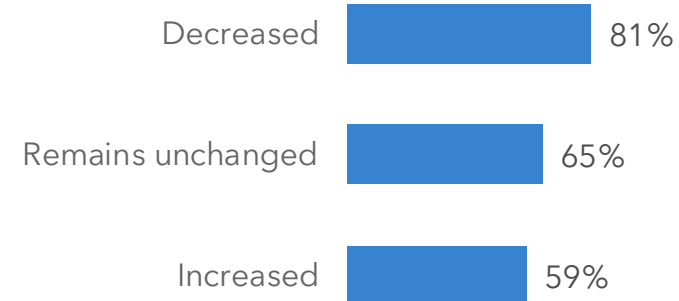
**Negative emotions:
By employment Status**



**Negative emotions:
By financial Status**

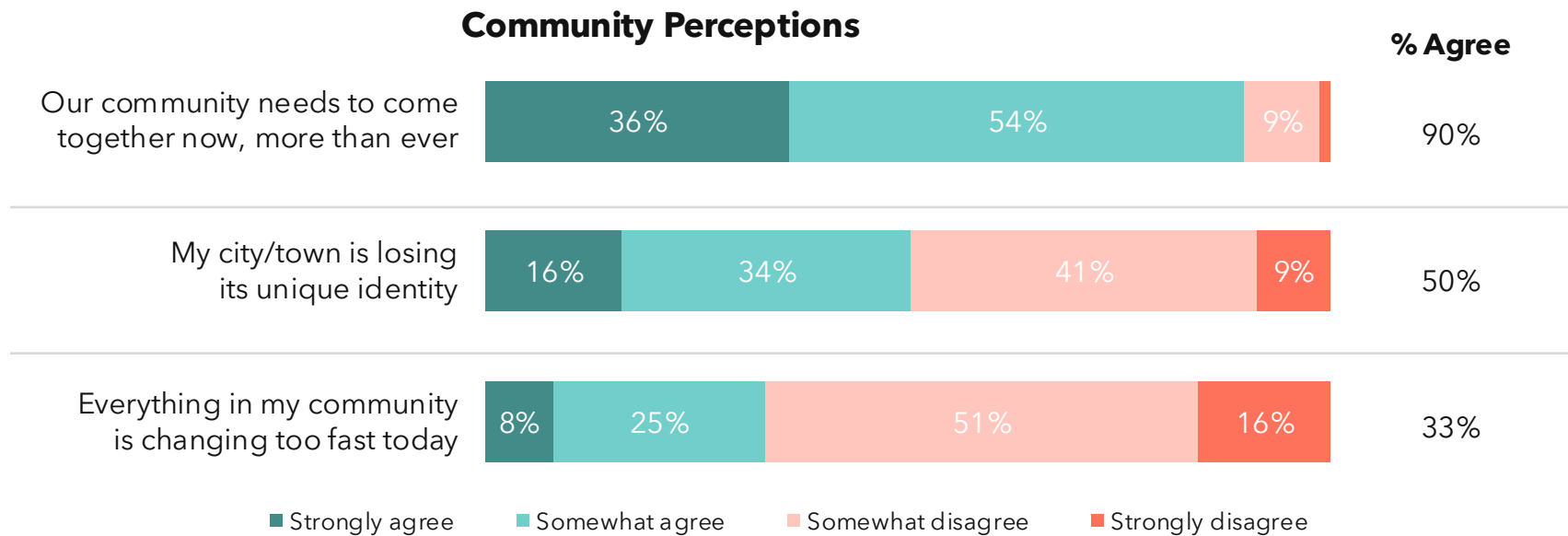


**Negative emotions:
By change in Income**



And while Albertans are split on whether their community is losing its identity, there is a strong belief that the community needs to come together right now

Albertans overwhelmingly agree on the need for community support, yet they are evenly split on whether their community's identity is being preserved or starting to erode.

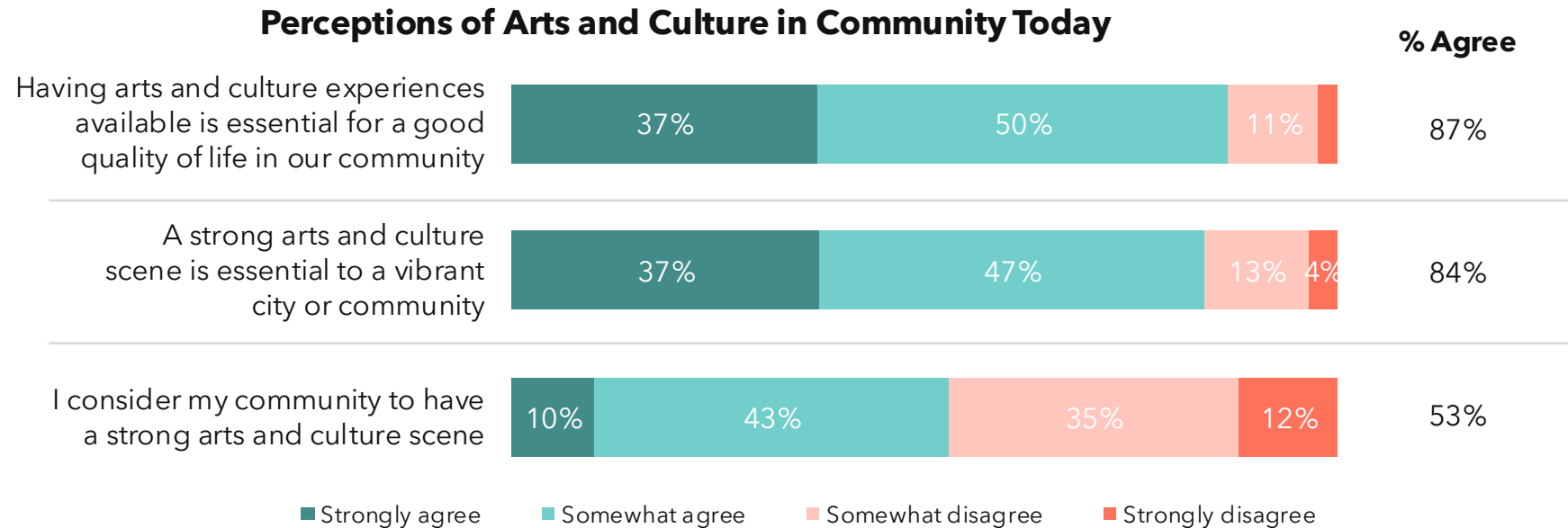


Base: All respondents (n=1,160)

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

Attitudes also reinforce that arts and culture experiences are essential to the quality of life in the community

However, the proportion of those who consider their community to have a strong arts and culture scene is considerably softer. This is particularly true for those within rural communities, who are often further removed from these experiences, and audiences ages 35-54.

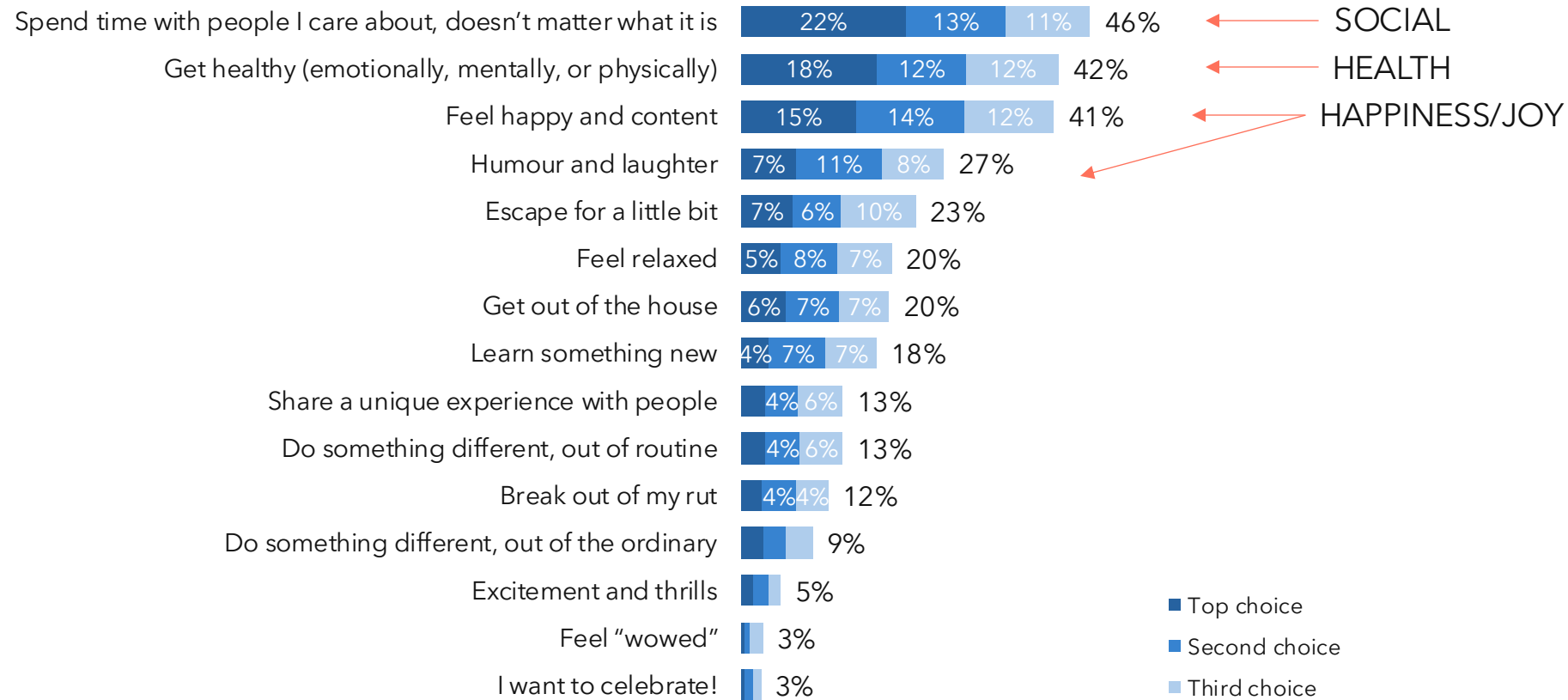


What benefits can the arts
provide?

Regardless of activities, Albertans are primarily looking for social benefits and positive emotional relief

Desired Outcome From Activities

RANKED TOP THREE



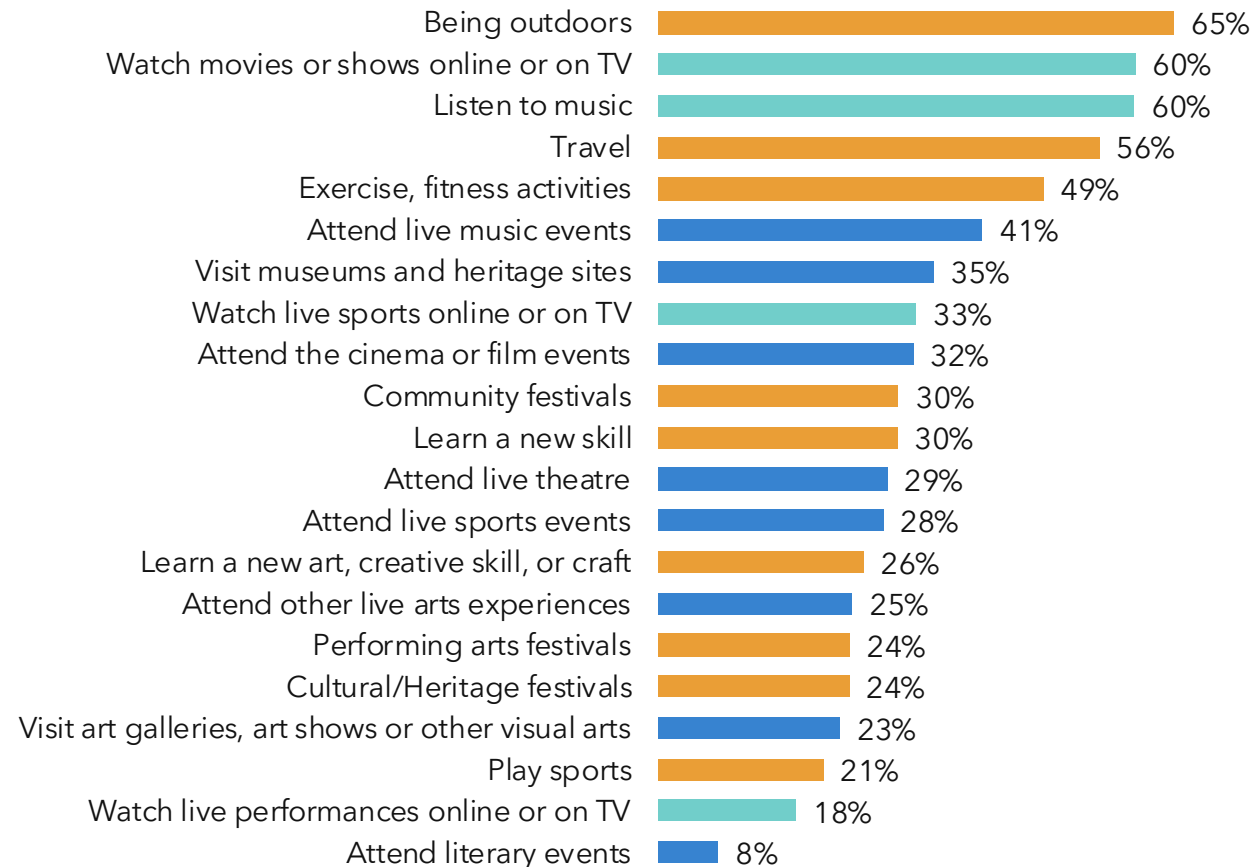
Base: All respondents (n=1,160)

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

The activities that Albertans participate in to achieve social benefits and positive emotional relief are very broad

Albertans indicate participating in an average of 7.2 activities from the list provided - a mix of things they do, observe, and attend.

What are Albertans doing?



95% Active Participation

82% Observing

78% Attending

While audiences are diversely motivated and do things for all sorts of reasons, their level of interaction will vary based on their needs

Aligning activities to level of interaction from your audience.

What do audiences get out of **ACTIVELY DOING** things?

Audiences are heavily looking to **do something different** (99%), want to feel **"wowed"** (97%) & do **unique** things (96%).

What do audiences get out of **OBSERVATIONAL** activities?

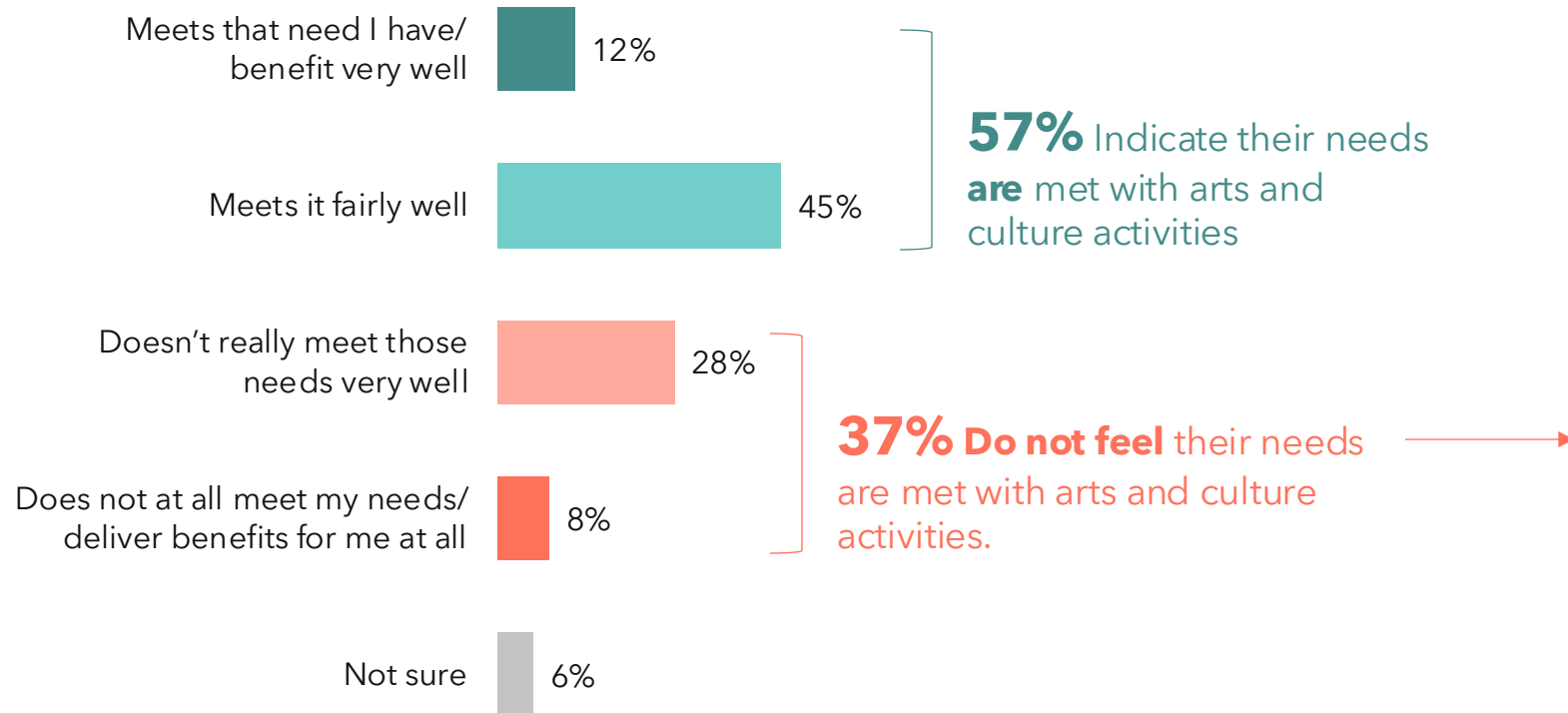
Motivations are more muted - they are most likely looking for **relaxation** (87%), **happiness and contentment** (87%).

Why do audiences **ATTEND**?

Social motivations are key-sharing **unique experiences** (85%) and **spending time with others** (82%). Finding **humour and laughter** (84%) and **escape** (83%) are also prominent.

However, a gap exists between the benefits Albertans seek from the arts and how well those needs are being met

Role of Arts and Culture to Achieve Outcomes



Tend to have a more negative outlook and be less engaged in the arts overall

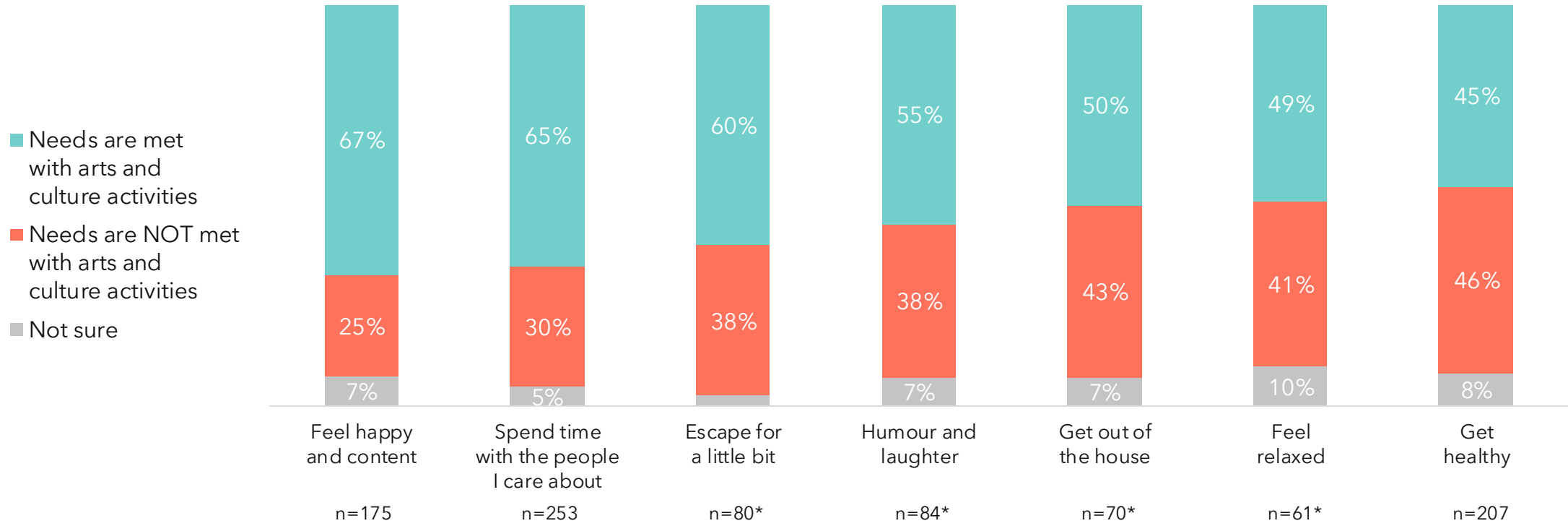
Base: Selected at least one activity at Q14 (n=1,148)

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.

The arts excel in addressing social and emotional needs but are less effective in meeting other needs

In Alberta's emotionally uncertain climate, people are seeking activities that bring happiness, connection, and a sense of escape. For many, arts and culture experiences are fulfilling these needs.

Role of Arts and Culture to Achieve Outcomes

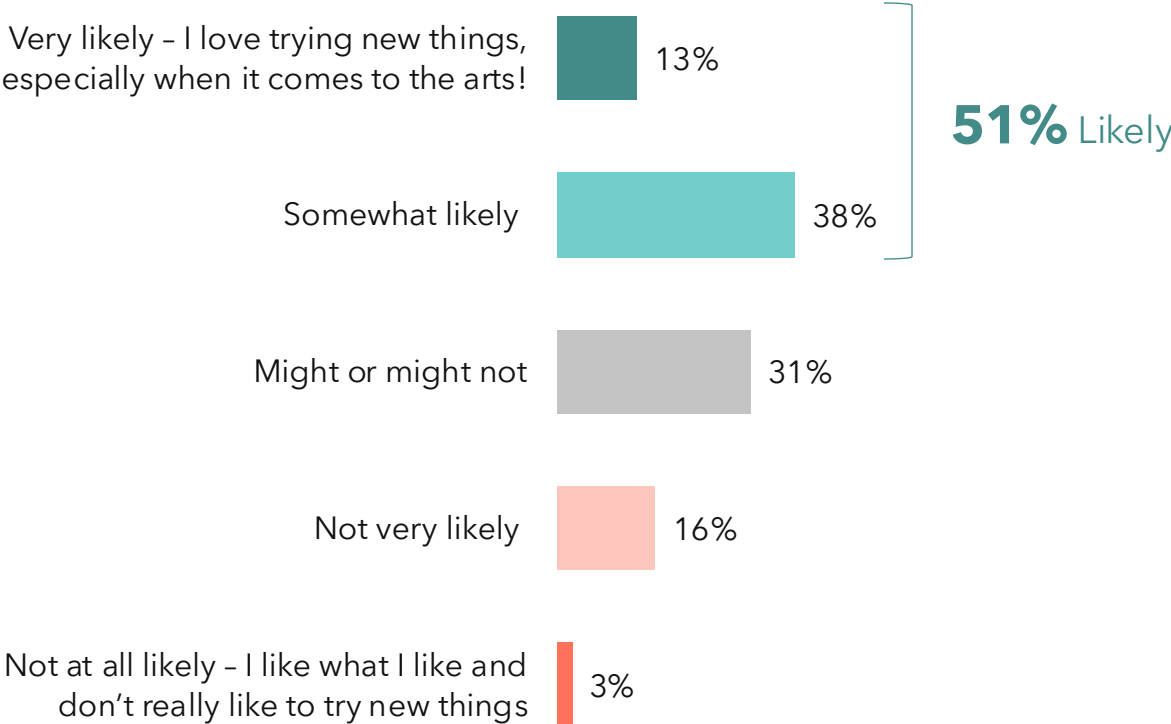


*Small base size - interpret directionally
 Base: Selected at least one activity at Q14 (n varies)
 Q16. Earlier you indicated [ANSWER FROM Q14] was the most important thing you were looking to get out of the activities you participate in. Overall, how well do the arts and culture activities you engage in meet that need? This could be any arts and cultural experience, activity, event you participate in, or event you attend.

Most Albertans are willing to try new arts experiences

Not surprisingly, those who are already immersed in the arts are more likely to try new things. As well those who are more informed about the arts are much more likely to try something new than those who are less informed.

Likelihood to Try a New Arts Experience

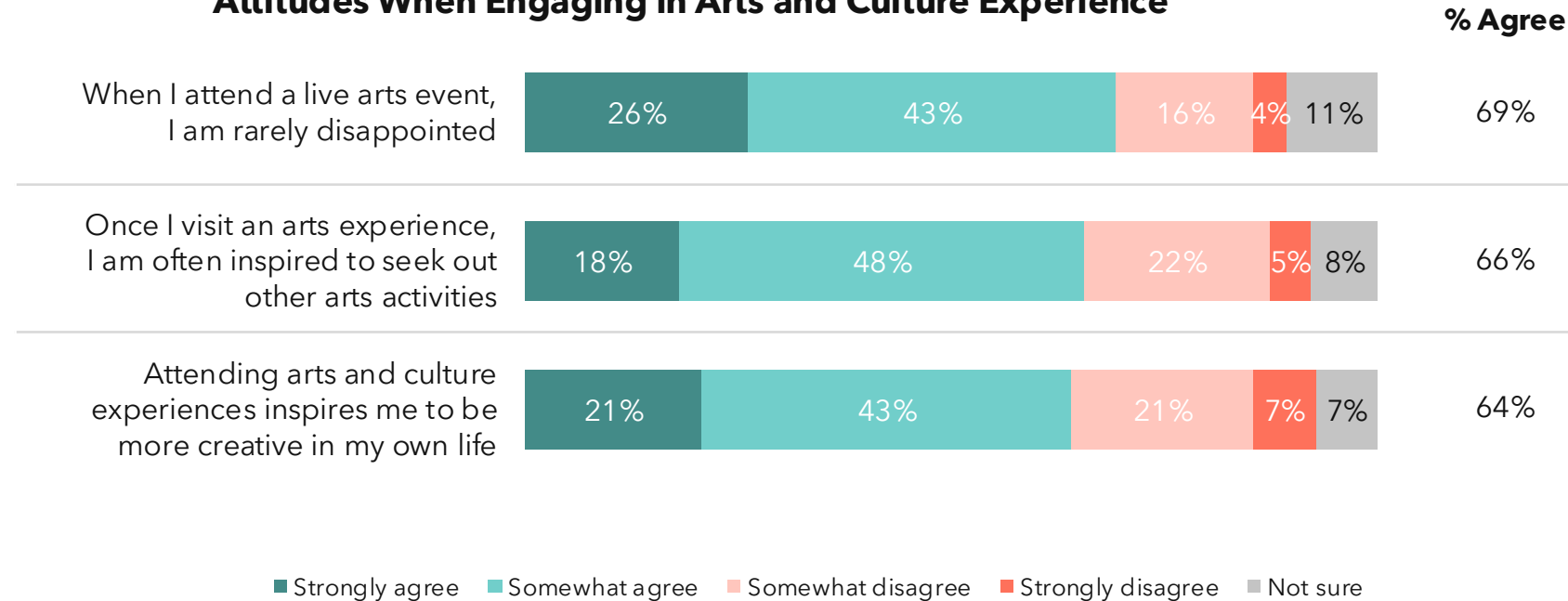


Two-thirds of those who are more informed are likely to try a new arts experience.

And most Albertans report that attending arts experiences often inspires them to seek other arts and creative outlets

Given the tenuous emotional environment, Albertans are seeking activities that make them feel happy, content, social, and help them escape for a while. Arts and cultural activities are meeting those needs for most.

Attitudes When Engaging in Arts and Culture Experience

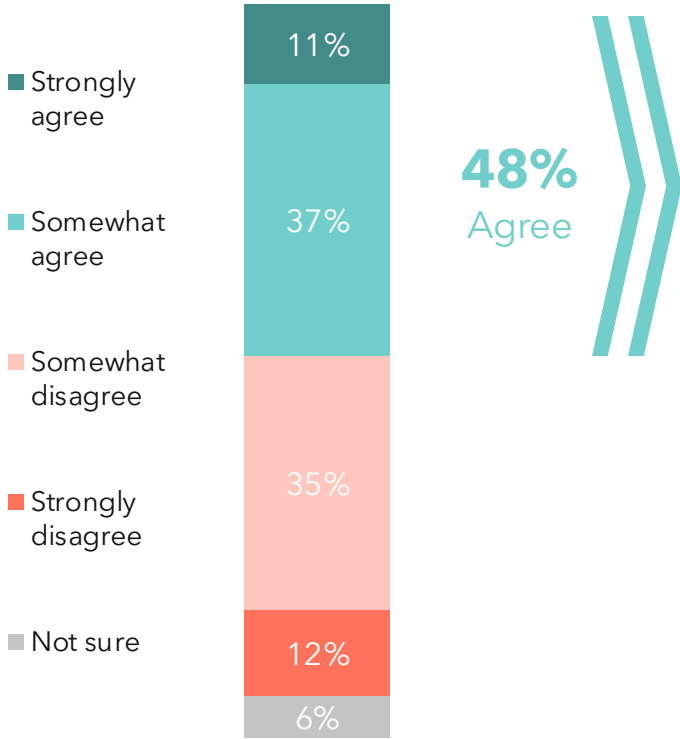


Those in a younger demographic tend to leave an arts and culture experience feeling more inspired and willing to seek out more activities

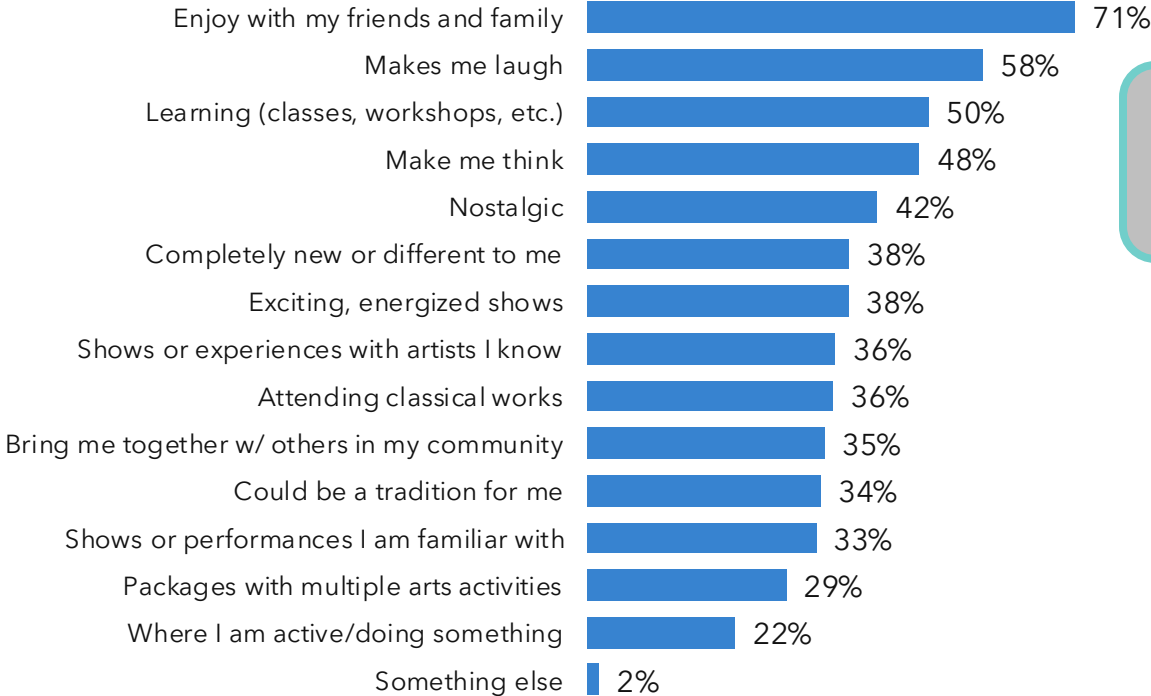
Sometimes a lack of knowledge is a barrier to engaging in the arts

Nearly half of Albertans want to engage with the arts more often but are unsure how to begin. Newcomers are most likely going to be interested in something to enjoy with friends and family and something that will make them laugh.

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?



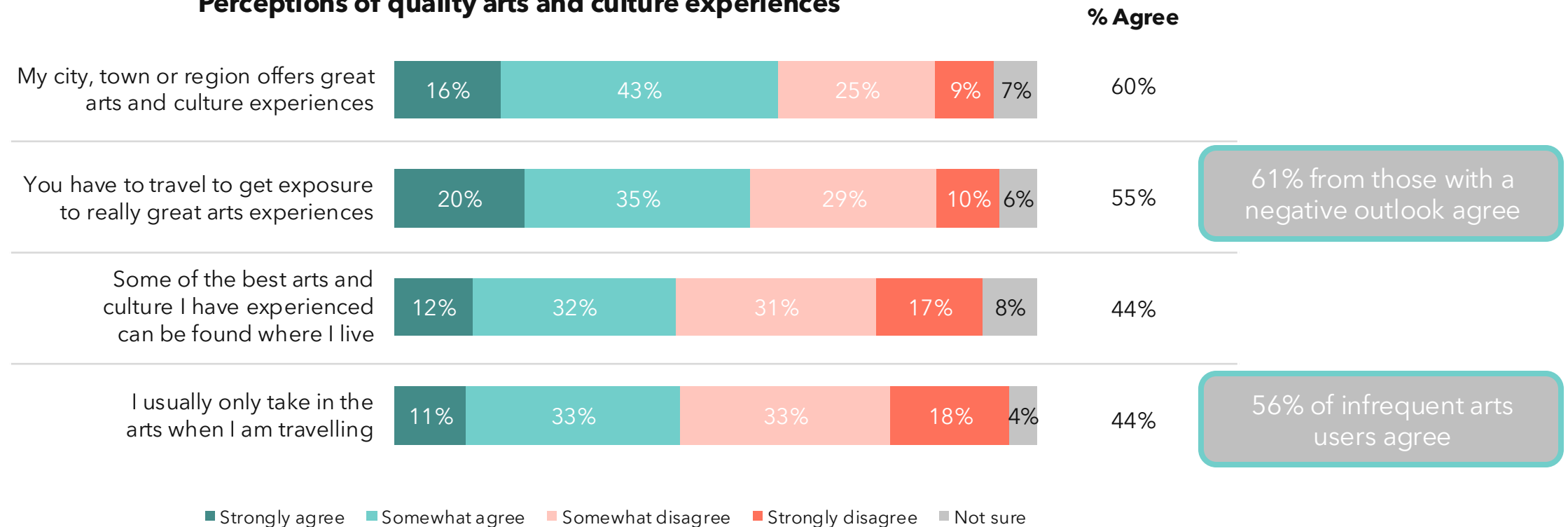
Women are more interested in learning than men.

Q19. Below are a series of statements about arts and culture related experiences. Please indicate your level of agreement with each statement Base: All 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 (n=556)

There are portions of Albertans that believe traveling is the best way to get exposure to quality arts experiences

65% of those located in regional Alberta tend to think that they need to travel to get exposure to arts experiences. This is also true for those who have a more negative outlook and for those who are infrequent with arts experiences.

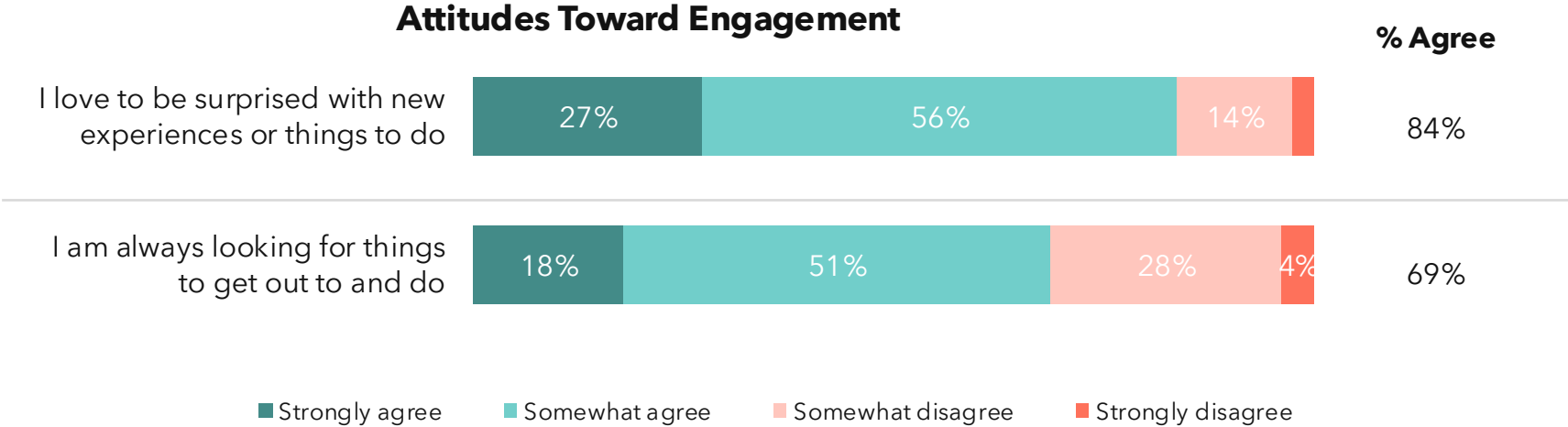
Perceptions of quality arts and culture experiences



Informing and Inspiring Audiences



There remains a healthy proportion of Albertans who are always looking for new experiences and things to do

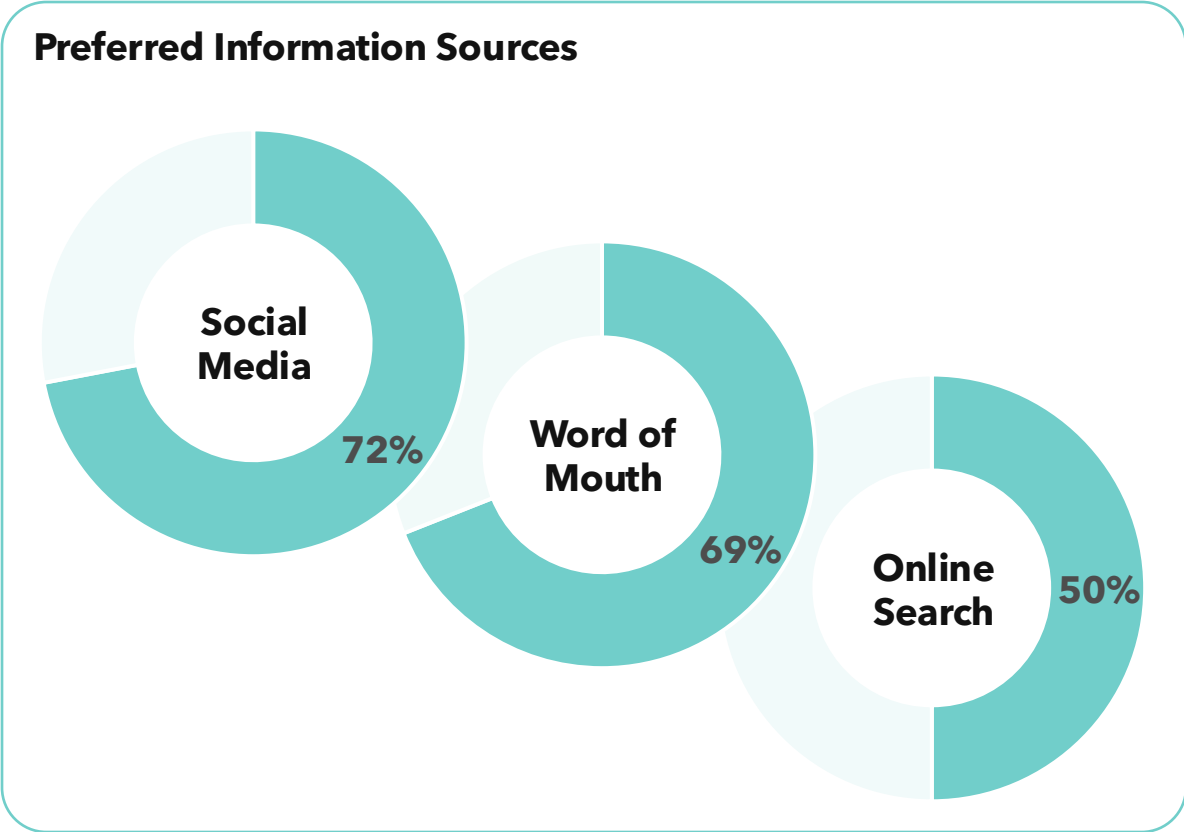
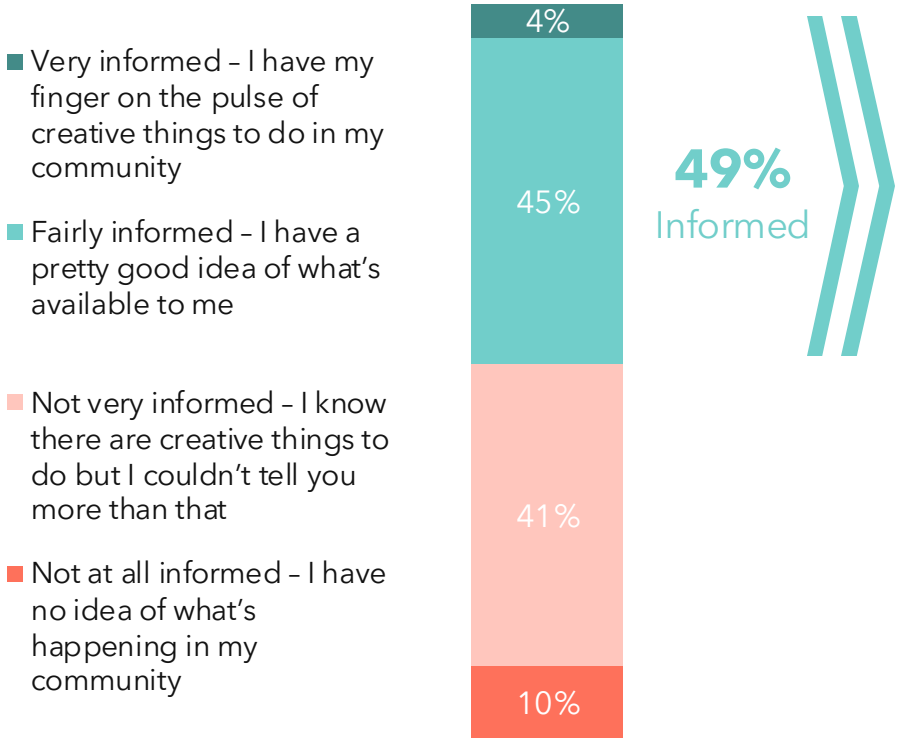


Base: All respondents (n=1,160)
Q13. Below are a series of statements that could be made about your community and things to do. Please indicate if you agree or disagree with each statement

Yet, Albertans are split on how informed they feel about things to do in their community

Among those who are informed, social media and word of mouth are the primary sources of information.

“In the know” on Arts and Culture Experiences

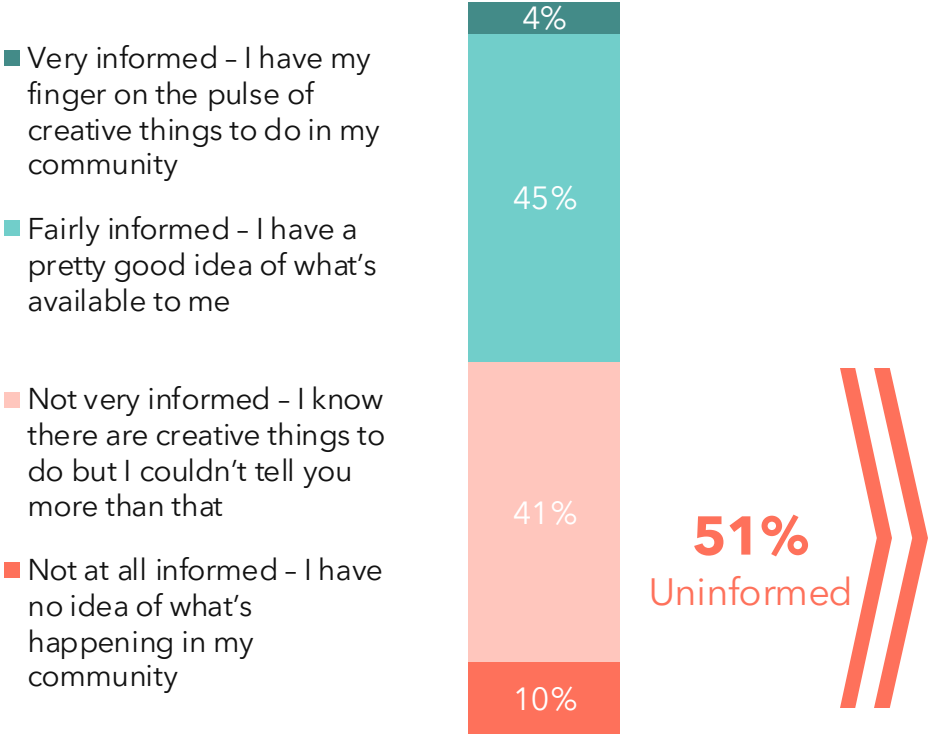


Q21. When it comes to arts and culture experiences, how informed or 'in the know' do you consider yourself to be? Base: All respondents (n=1,160)

Q22. Where do you get your information on what experiences and activities are happening in your community? Select all that apply. Base: Informed or "in the know" on arts and culture experiences (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

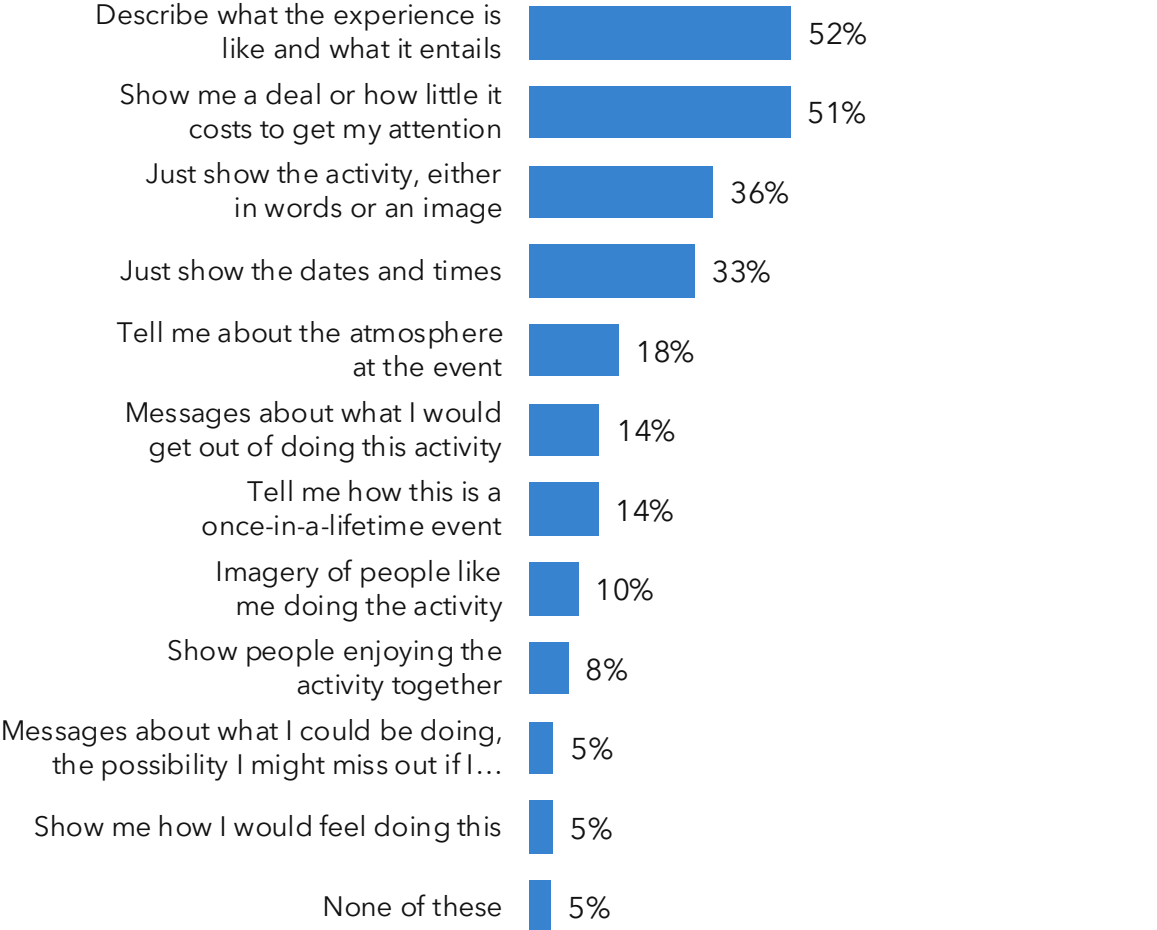


Q21. When it comes to arts and culture experiences, how informed or 'in the know' do you consider yourself to be? Base: All respondents (n=1,160)
 Q23. If a company wanted to get your attention about an activity, event or experience, what would they have to do or say? Please select up to three. Base: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

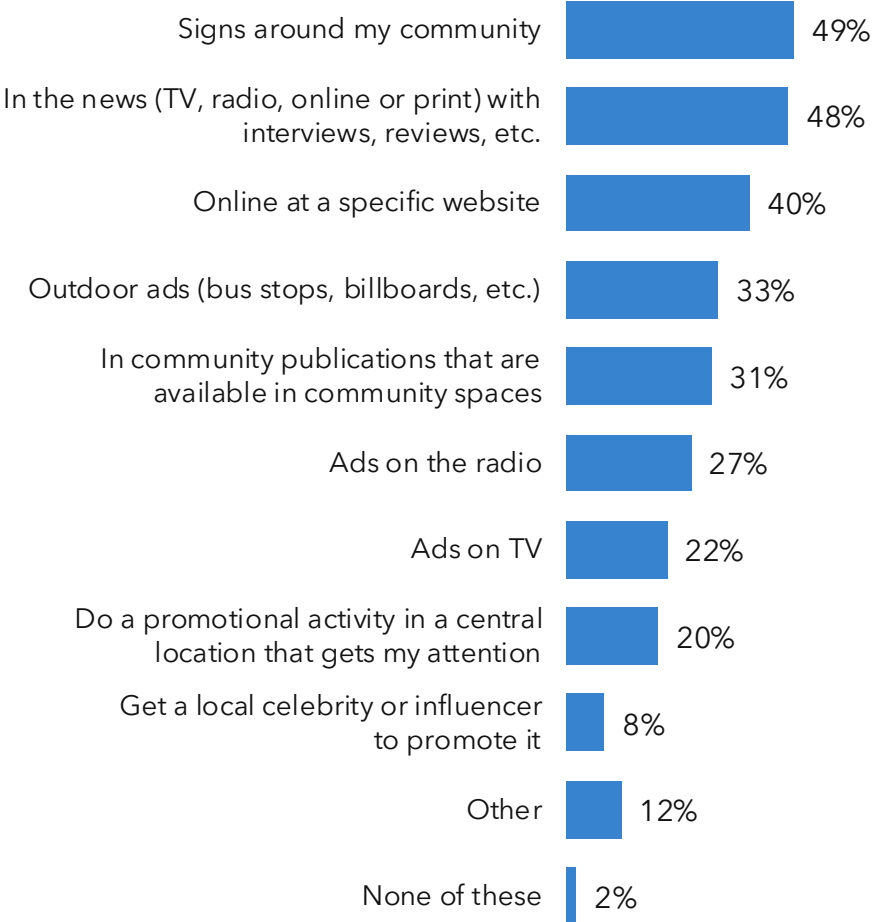
How and where to capture attention (awareness)?

Audiences want clear descriptions of what to expect, and how much it's going to cost. They also tend to be more aware of traditional marketing communications like community signs or news. While social media and word of mouth can be powerful tools, the specific messaging may not be breaking through to these audiences.

Communication Strategies to Get Attention



Channel Strategies to Get Attention

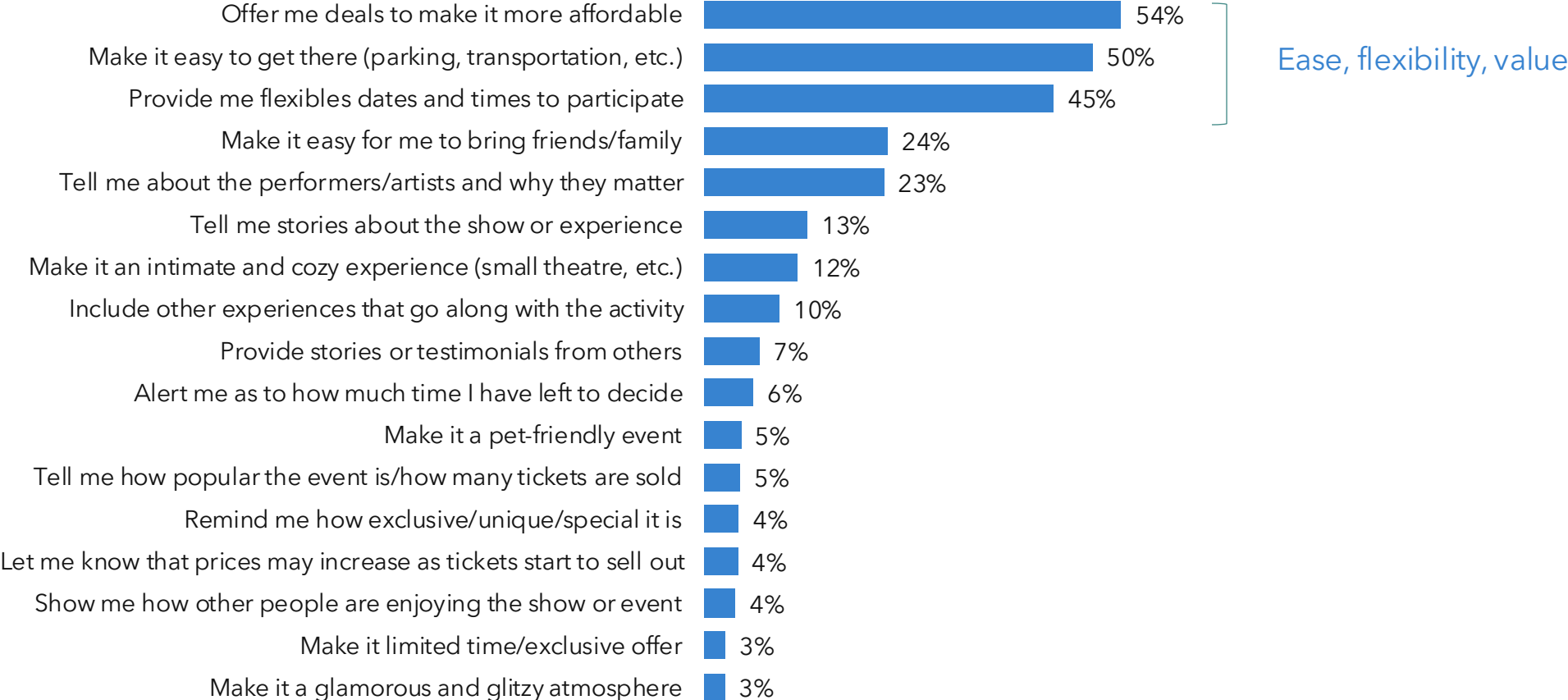


Q23. If a company wanted to get your attention about an activity, event or experience, what would they have to do or say? Please select up to three. Base: All respondents (n=1,160)
 Q24. If an arts company that you didn't know about wanted to make you aware of a remarkable experience, where would they be most likely to get your attention? Select all that apply. Base: All respondents (n=1,160)

What can be leveraged for the consideration phase?

As audiences begin to consider an experience or event, additional levers to pull are around flexibility. Offering deals, ensuring people know how to get there and where to park, and offering multiple dates and times can create more opportunities to convert as fewer barriers exist in the decision process.

Elements to Entice Final Decisions to Participate

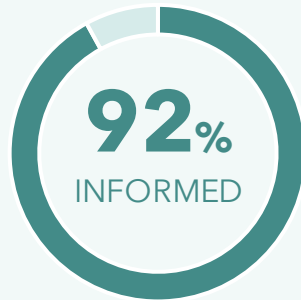


Base: All respondents (n=1,160)
Q25. What should organizations be doing to finalize your decision to spend your time or money with them? Select up to three choices

How do audiences differ?



IMMERSED



INFO SOURCE:



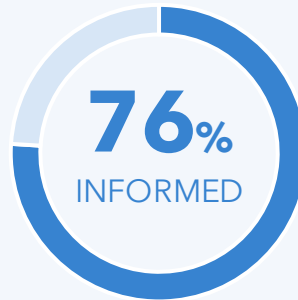
Past
experience

They want to be reminded of arts and culture experiences they've enjoyed in the past. **Promotional activities**, local **celebs or influencers**, and **community publications** will get their attention.

This is a group that actively engages with the arts today; they are captivated. To increase attendance, they want to know specifics - the performers/artists, the atmosphere, cozy or glitzy, and they are drawn to exclusivity/unique experiences.



ENGAGED



INFO SOURCE:



E-mail or
direct mail

They are active, but not enthusiastic and will need to be reminded of the entertainment value of the arts to recapture their attention. They pay attention to community publications (less so for traditional channels).

To increase attendance with this group, tell them stories about the show or experience (including seeing others enjoying the experience). They are also more likely to finalize engagement if other experiences are included.



PASSIVE



INFO SOURCE:



TV/OOH/radio

Remember, it's less often they naturally see themselves engaging in arts and culture experiences. Reach them via **traditional channels** (OOH, TV, radio), but messages must resonate to get their attention.

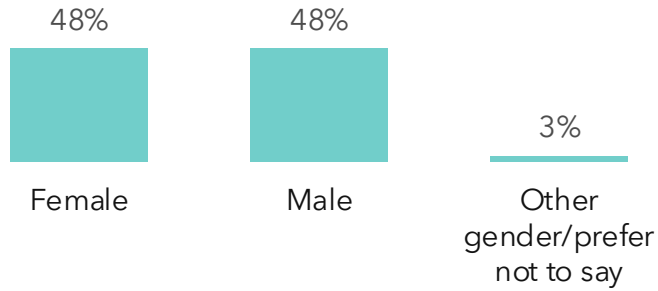
Besides inspiration, this audience needs convincing to commit. To do that, offering deals and making it easy are the most important. To find value in arts experience, they'll also want to know about experiences where they can engage with friends/family.

Respondent Profile

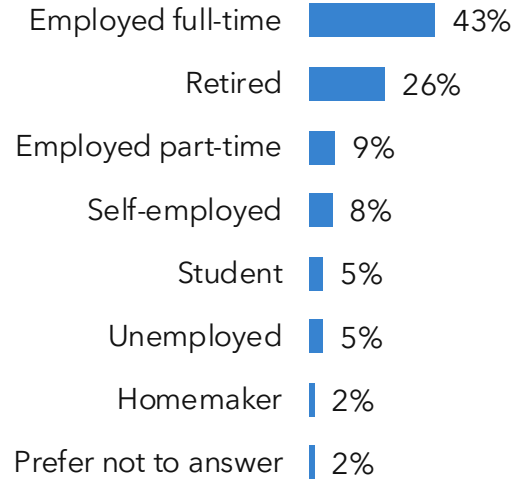


Respondent Profile: Who We Heard From

Gender



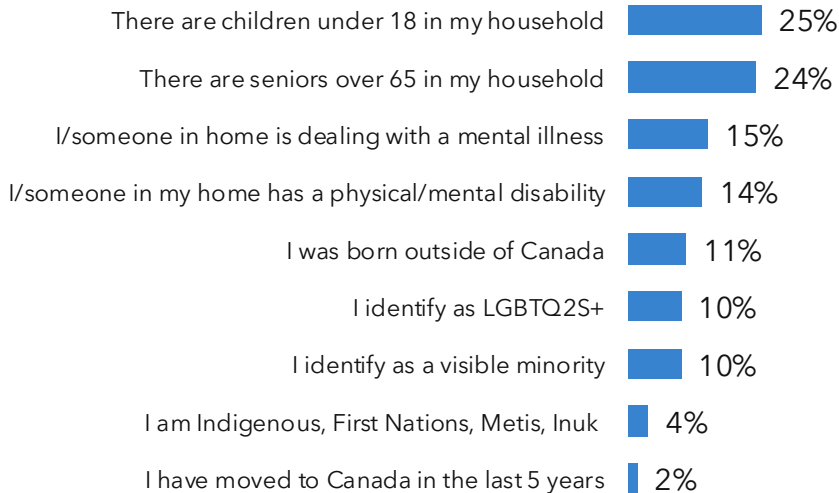
Employment



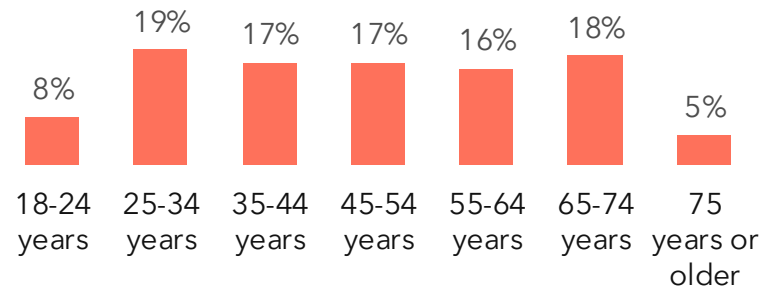
Household Income



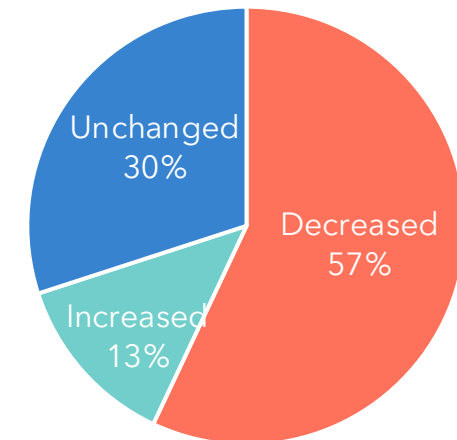
Diversity/Identity



Age



Income Change - Past 3 Years



Base: All respondents (n=1,160)

Understanding people.

It's what we do.

**Stone —
Olafson**

Questions or Comments?

Please contact: mathew@stone-olafson.com

kim@stone-olafson.com

jason@stone-olafson.com