Stone — Olafson

Spotlight on Arts Audiences

Wave 3: Summer/Fall 2024

Alberta results

Table of contents

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.

A collaborative and evolving resource:

Purpose & Objectives:

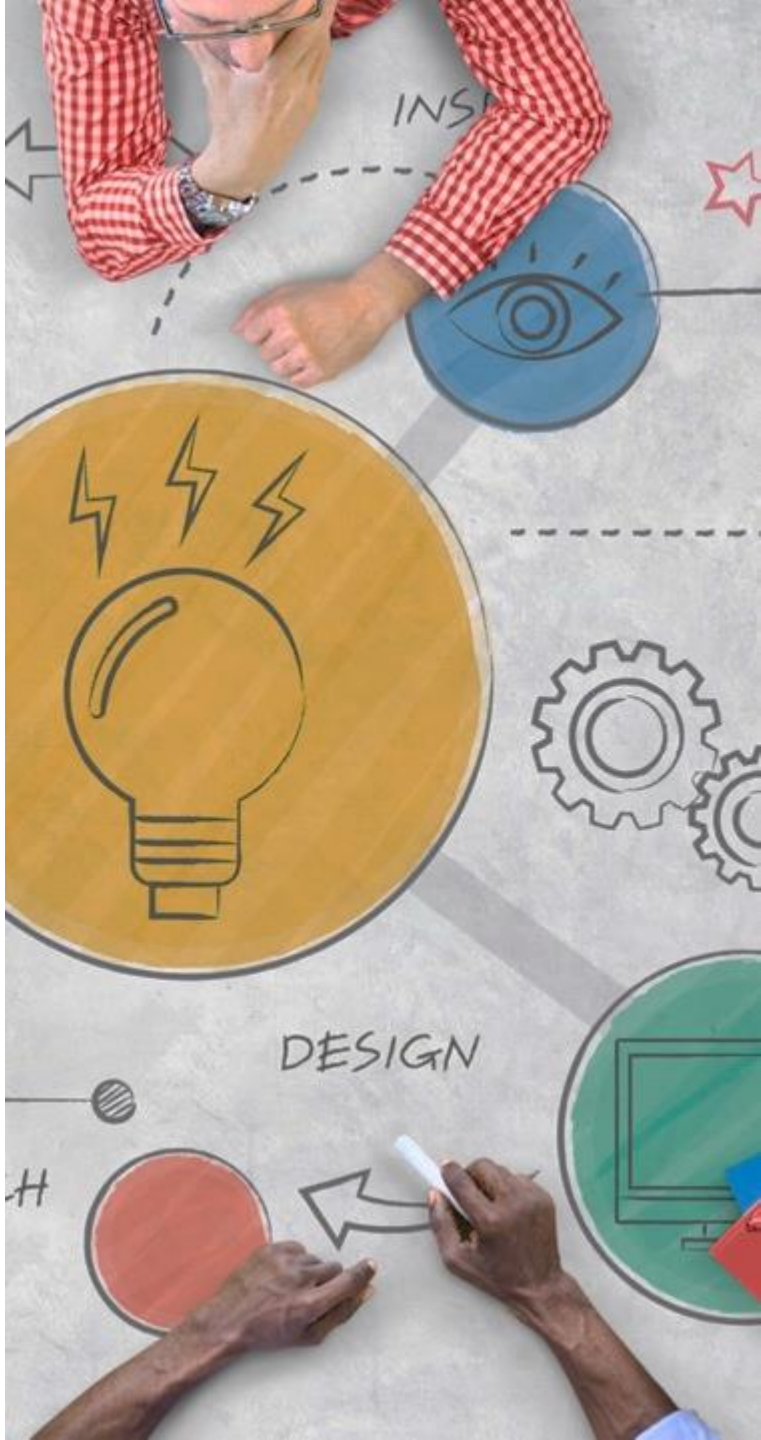
Alberta continues to be at a crossroads brought by a pandemic that has changed public life and re-shaped our economy. This is especially true in the arts sector which continues to experience a decline in engagement with events and activities. This work was developed for this sector exclusively. It builds 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 3:

- Assess interest and engagement with arts related education opportunities
- Understand spending habits and how they've altered
- Identify current barriers to last minute engagement
- Understand ad hoc decision variables

How to use this report:

This work is designed to be shared. We encourage our partners to distribute and actively apply the insights to their business. The ultimate goal is to build on collaboration by sharing resources that can drive smart and focused engagement strategies.



Research Approach:

This report represents the third 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 August 5th – 15th, 2024.

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.

Stone — Olafson

A reminder of what we’ve learned so far

First, 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.

Inspiring more engagement requires widening our reach to audiences who need to understand experiences in more personal and emotional terms.

1. **Promises of emotional benefits** are key to garnering greater investments of **time** and **dollars**.

2. In a market with less time, success is likely to hinge **deepening connections** with those who are already engaging and **widening reach** to inspire attendance from passive audiences.

3. 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.

4. Some form of subscription has a future – it just doesn't look like what it used to. The market **craves flexibility**. Consider ways to meet their expectations by providing choice.

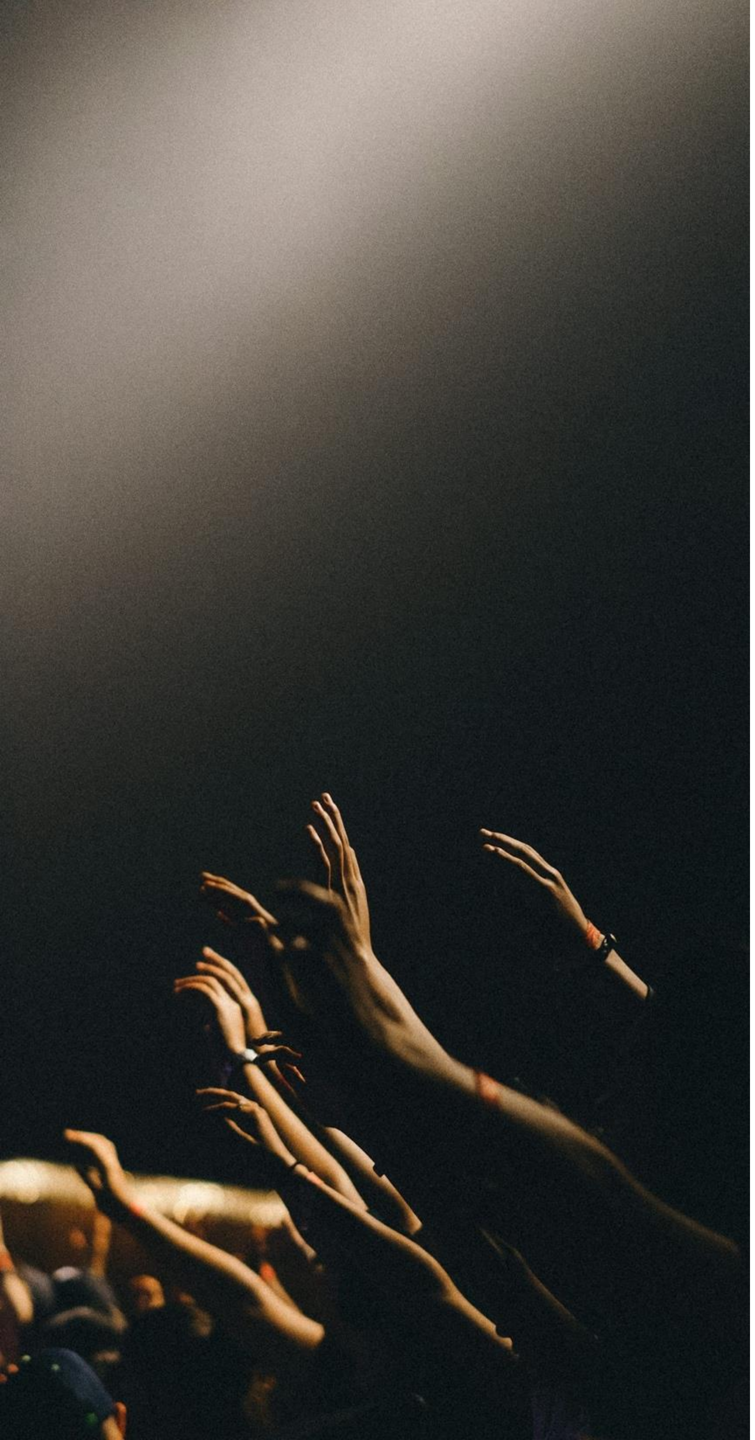
5. Philanthropic support will be a challenge but not impossible. **Evolve messages** past the personal motivations which drive support now. Show impact, create urgency, make it easy.

Stone — Olafson

What are we seeing this fall?

Stone — Olafson

Engaging audiences in the fall season



This fall our study continues to explore different avenues of engaging audiences with arts experiences and builds on learnings from the previous waves of research.

- **Education:** With the return to school, it is natural to explore learning opportunities as a way to engage audiences with the arts. Results show it is clearly something for children, but fewer adults are connecting with classes. One of the key challenges will be **aligning the experience of arts education** – and all the benefits they deliver - **with audience motivations**. Decision makers still have expectations to enjoy themselves and that sometimes gets lost among messages about learning. The other challenge will be simply getting their attention – so many are not engaging simply because don't have a line of sight to the opportunities in the first place.

- **Spending:** Affordability is a top issue across the country and more than ever it is affecting spending habits. While spending is certainly constrained, it is still happening – the key is to get them to consider the experience in the first place. Often in challenging fiscal environments, consumers will weigh value more heavily and that appears to be the case now. This means the conversation will be more about **value than price on its own**. Feedback this wave shows the value discussion may have little to do with price – but may be more about showing a social, attractive and enjoyable experience first.

- **Decision making:** As we learned from previous phases of work, consumers are making decisions later and later in their journey. But that doesn't mean they are spending any less time planning – it just appears the **journey has shifted and planning now happens well before a final commitment to engage**. What is clear is that decisions are a shared experience – people are making them together and factoring things like value AND easiness. Organizations have to not only show value (as discussed above) but also eliminate the hassle of engagement.

Engaging audiences in the fall season

How Albertans think about arts education, their entertainment spending habits, and their approaches to decision making offer insights that align very closely to some basic principles for influencing consumer behaviour. Consumers need to see that engaging with arts experiences are:

1. **Easy:** Along with cost, hassle is a major barrier impacting the final decision consumers make. Consumers have many experience options to choose from but have limited time and money to invest. Those things that are harder or involve uncertainty or hassle are likely to be discarded. Make it easy to find out about you, offer flexible ticking options, remove or ease barriers that make it even slightly harder (finding a location, parking, etc.) and make them comfortable with information.

2. **Attractive:** This is the first thing that gets their attention. Consumers may have less money to spend, but their decision journey starts with initial desire to engage with an experience. Early in the planning journey they are deciding if something is worth it based on what they feel, get to see, or do. In the simplest terms, they need to see the joy or the enjoyment in the experience before moving down the path to attending. Help them see it.

3. **Social:** Not only are their key motivations social, but decision makers are most likely to be sharing the decisions and planning as well. It may be helpful for them to see how the attractiveness of the experience is also shared – the benefits are enjoyed together.

4. **Timely:** Findings show that only a small number of experience decisions are actually impulse decisions. Most are decided more than one week before an activity. Their planning windows are likely much longer. Given they are planning extensively, there may be opportunities to tap into the process to get their commitment after you've inspired consideration – timing of secondary messages around value/savings becomes quite important.

Engaging in Arts Education

Stone — Olafson

Communicate fun and accessibility to drive adult participation

Adult participation in arts activities is low – with less than half participating in any activity in the past two years. Although adults understand the benefits of developing skills and find arts activities relevant to themselves and their families, this does not translate into their own increased participation.

While barriers such as time and cost will always present in any activity (whether arts or otherwise), there are a number of barriers that can be overcome. Many cite a lack of awareness (i.e., don't know where to start, or not aware of opportunities) as reasons for not participating. Others have feelings of complacency (i.e., I'm not a creative person). They (wrongly) believe that these types of activities are only for a specific type of person and they do not fit the mold, and as such, may feel these activities are off-limits to them.

Promotions for arts activities are often focused on learning and development. While self-development and personal growth are indeed key benefits of participation, this may not be enough to get Albertans through the door. The primary reason(s) adult Albertans do participate in arts activities are overwhelmingly related to fun, social and entertainment (79% mentions). These reasons to participate are much higher than those related to skills and development (32% mentions).

Work towards changing the adult inner narrative on accessibility. Shift messaging towards fun as the primary benefit.

Messaging and communication strategies should seek to break down accessibility and stereotype barriers. Highlight that classes are for everyone. Furthermore, communicate the 'fun' factor, using enjoyment, social, and entertainment as means to increase engagement. Dominant messaging should be focused on having fun first, and that skill development simply comes along as an added benefit of participation.

Stone — Olafson

Children's messaging should stress both fun and development

Child participation in the arts is more than double that of adults – with four-in-five having participated in the past two years. However, children have the benefit of participating in majority of arts activities through school.

For children, fun and entertainment reasons are also a primary driver of participation (59% mentions), but development reasons are also sizeable (42% mentions). Mentions of being 'good for overall development', 'fostering creativity', and 'develop fine/gross motor skills' are all significantly higher reasons that children participate compared to adults.

Nearly all adults with children agree that arts education is an important part of their children's development as they grow up. Indeed, learning and acquiring skills is a natural evolution of childhood.

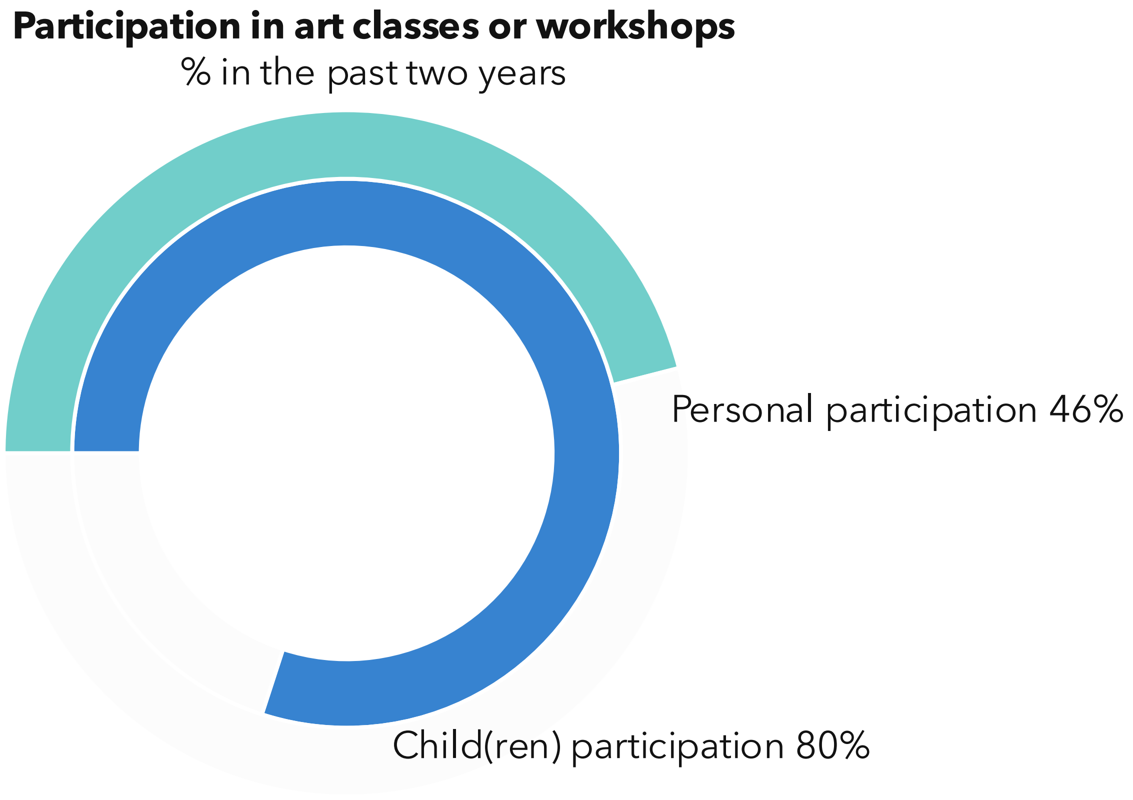
Extra-curricular time for arts education is in competition with all other extra-curricular activities (i.e., sports, fitness, clubs etc.). So how can we increase participation in arts education outside of school?

Use both aspects of fun and development hand-in-hand in messaging.

Like adults, messaging should still place emphasis on the 'fun' aspect. However, when it comes to the development theme, this should also continue to be stressed rather than muted. Fun and development need not be mutually exclusive. For specific activities that are heavily school-based (i.e., digital arts, music, film etc.), focus on messaging that seeks provide a fun spin on extending learning beyond the classroom. For activities that are already mostly outside-school based (i.e., dance, ceramics, painting party), accentuate the acquisition of new skills in a fun social setting.

There is a stark difference between adults and children's participation in art classes and workshops

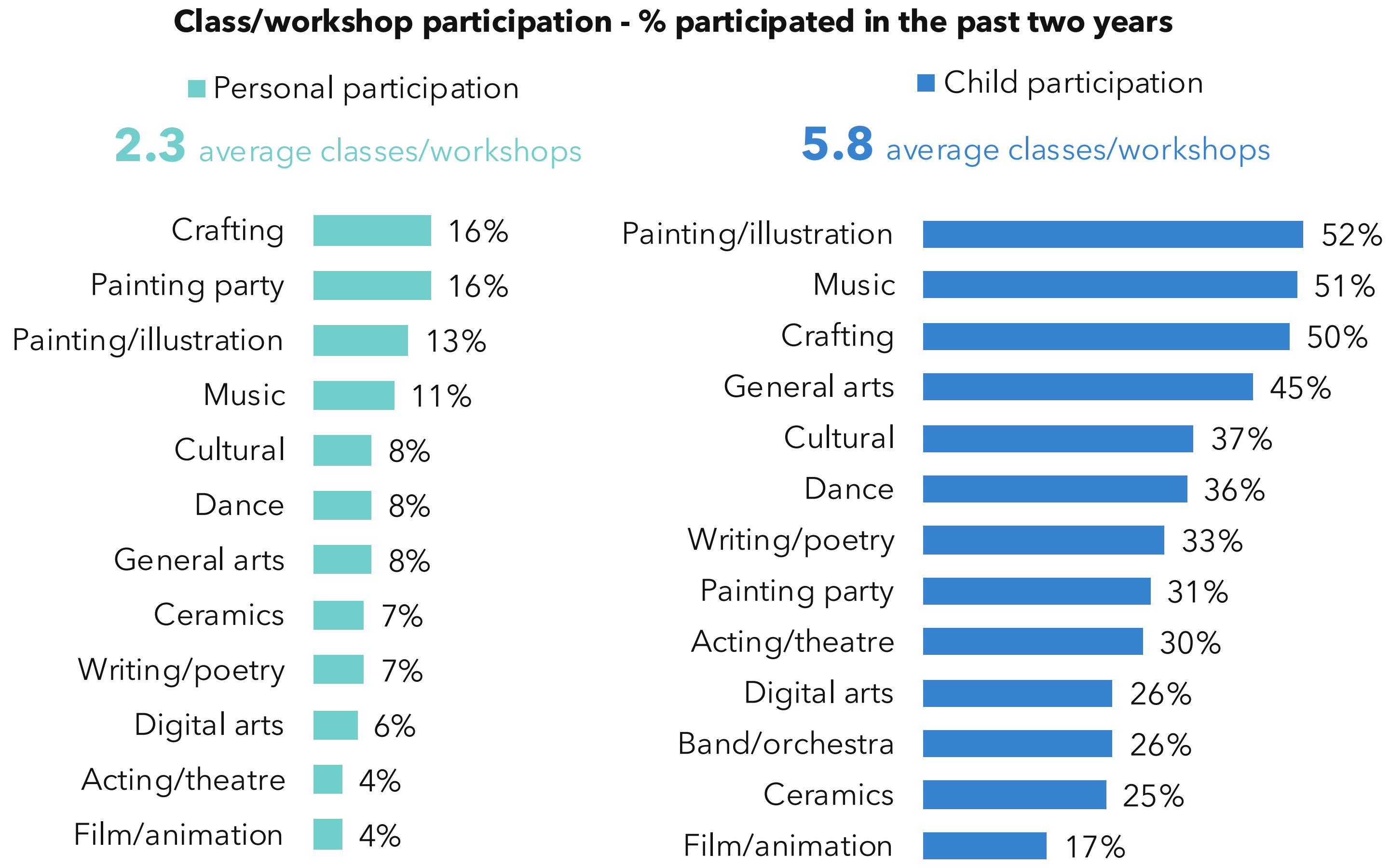
Children are naturally exposed more often to arts education experiences at their lifestage. At a younger age, there is a general focus on overall development which includes physical, mental, creative, etc.



Base: All respondents (n=1,160); Have children under 18 in household (n=303)
Q11. Which of the following have you personally done in the last two years?
Q13. How about for your children? Have they participated in any of the following within a school setting or outside of school in the past two years?

Children participate in more than double the number of classes/workshops than adults

Even the most popular adult activity has less participation than the least popular child activity.



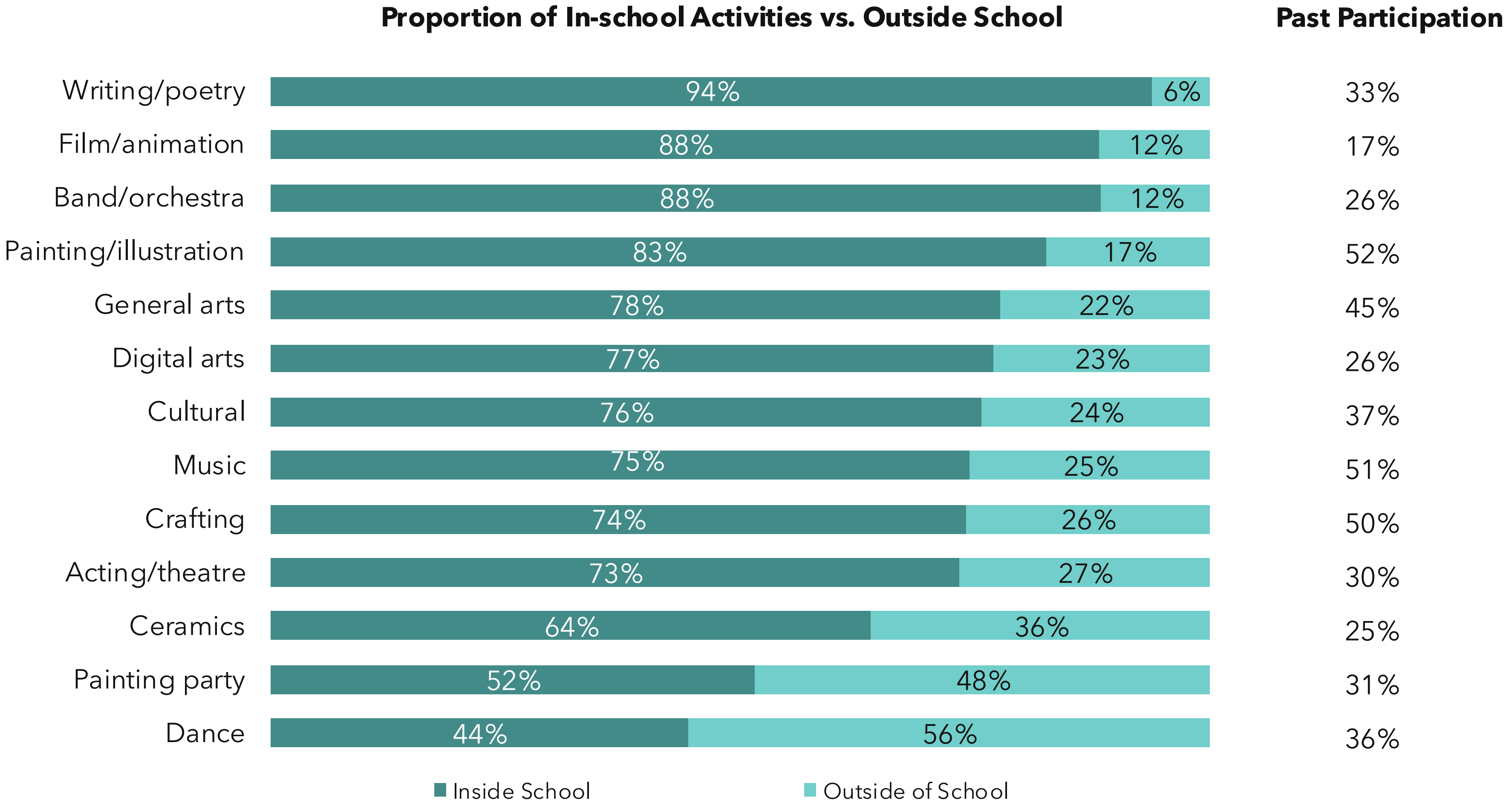
46% have participated in at least one activity

80% have participated in at least one activity

Q11. Which of the following have you personally done in the last two years? Base: All respondents (n=1,160)
Q13. How about for your children? Have they participated in any of the following within a school setting or outside of school in the past two years? Base: Have children under 18 in household (n=303)

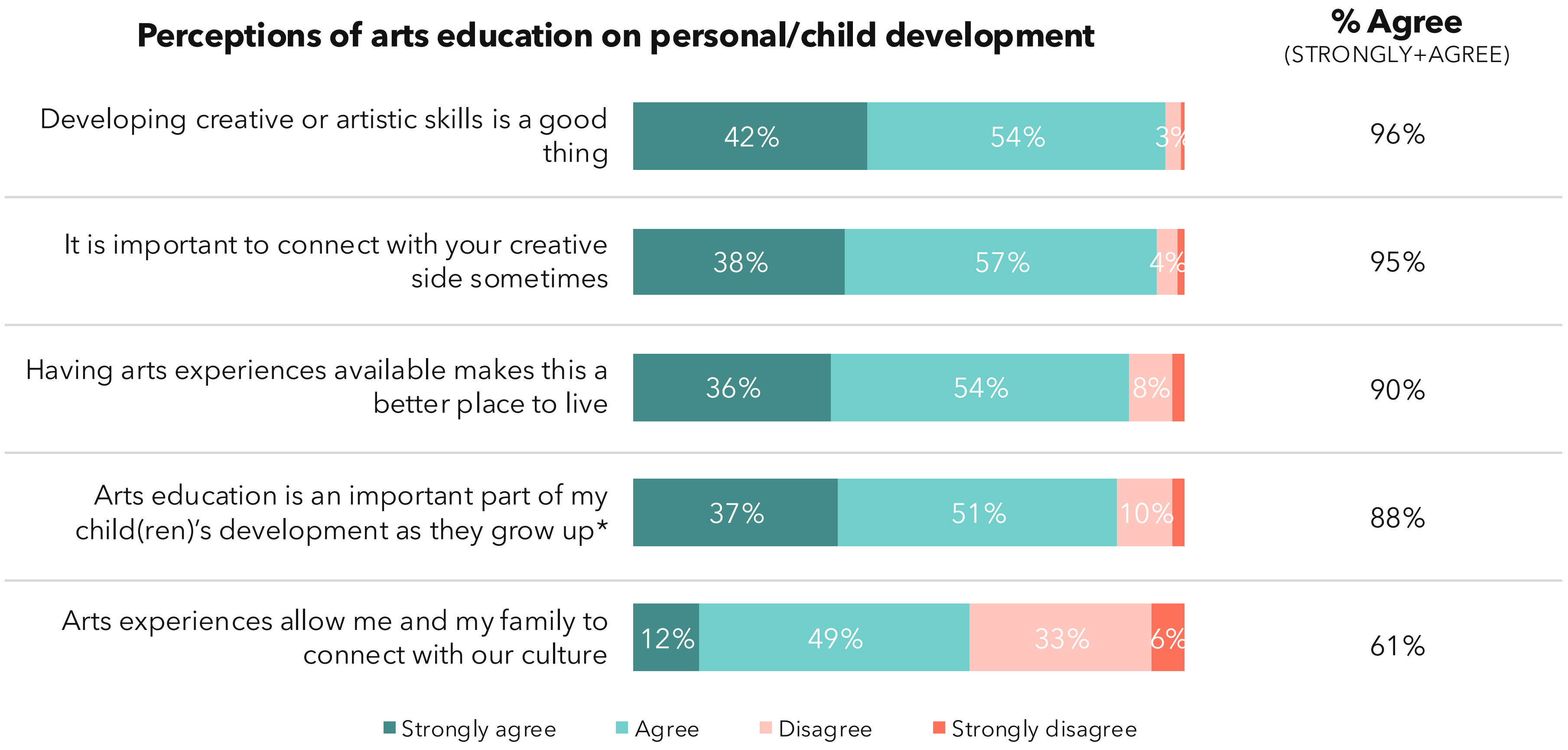
Child participation for most activities is driven by school involvement

Arts education is generally more prevalent during the school day and parents defer to schools to deliver such classes. The exceptions are dance, painting parties, and ceramics which all have much higher levels of outside school participation.



Base: Have children under 18 in household (n=303)
Q13. How about for your children? Have they participated in any of the following within a school setting or outside of school in the past two years?

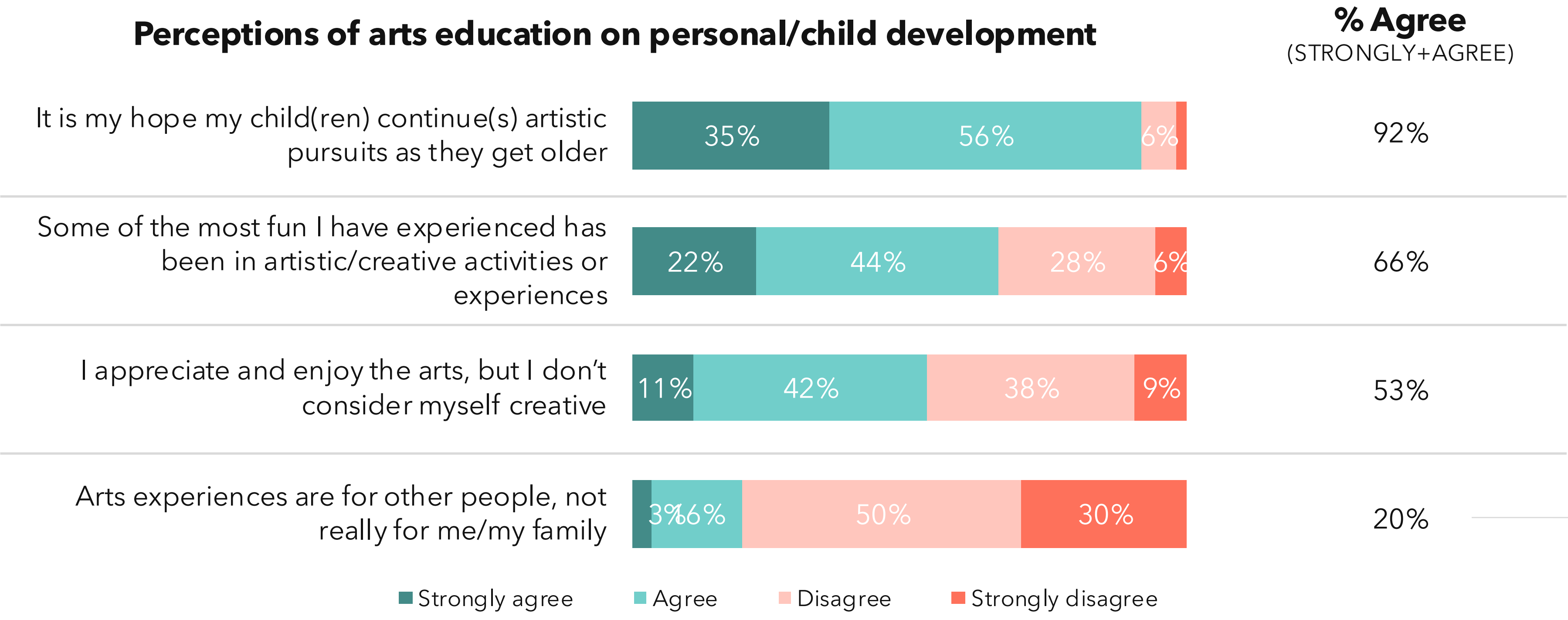
Albertans agree there are strong benefits to engaging with arts education



Base: All respondents (n=1,160); *Have children under 18 in household (n=303)
Q15. Below are a few statements about arts education; please review them and tell us if you agree or disagree with each one.

And they see relevance in artistic experiences

However, creativity can be intimidating and the idea of not considering themselves creative could be a limiting factor to participation in activities. Lack of exposure could also be a factor for lower agreement on arts being the most fun they've experienced.

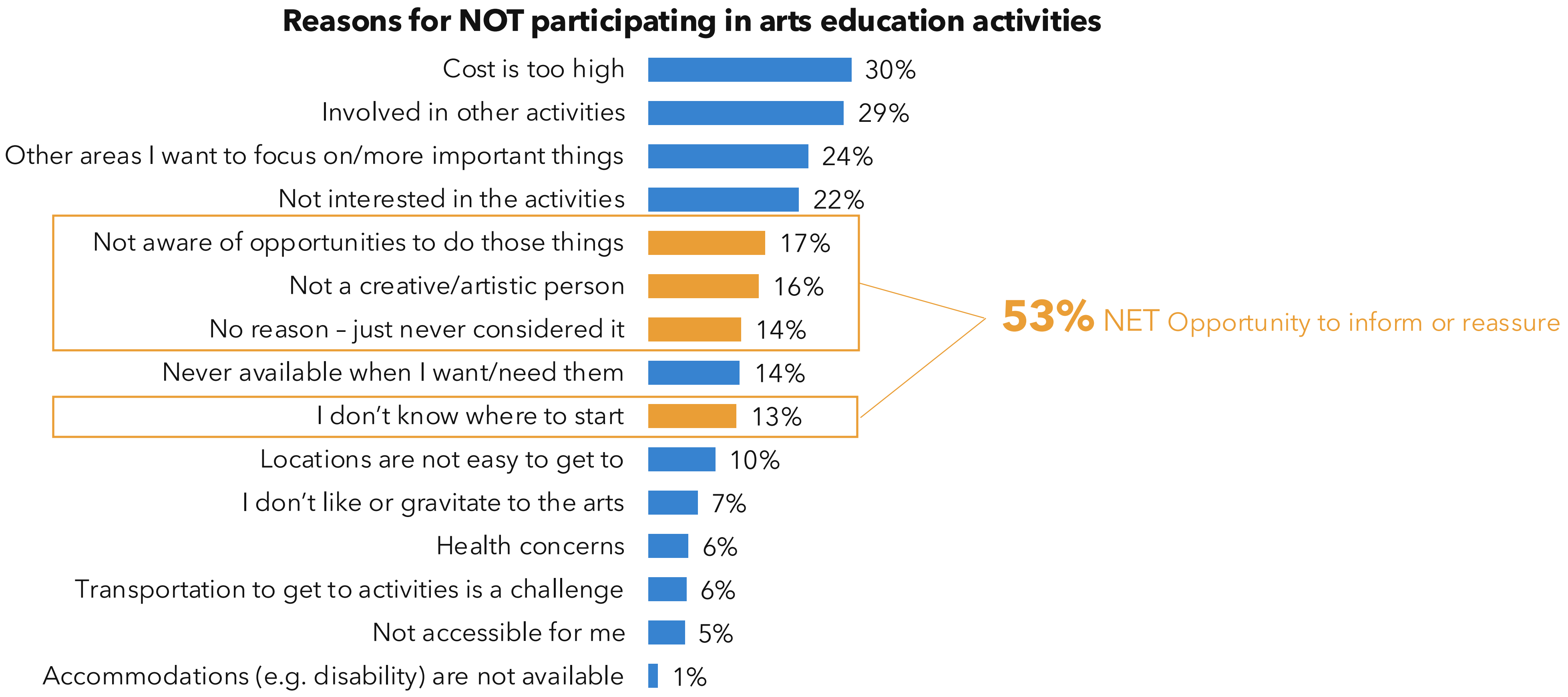


Note: As a negative statement, reversed, this translates to 80% agree that arts experiences are relevant to them

Base: All respondents (n=1,160); *Have children under 18 in household (n=303)
Q15. Below are a few statements about arts education; please review them and tell us if you agree or disagree with each one.

Many adults are simply unaware or complacent, which presents a significant opportunity

More challenging barriers relating to cost and time will always be prevalent.



Base: Have not participated in arts related activities or experiences in the past two years (n=621)
Q12. Which of the following best describes why you personally have not participated in any of the listed arts related activities or experiences?

Lack of awareness is even higher among younger Albertans

Stone – Olafson

% Reasons for not participating	GENDER		AGE			ENGAGEMENT WITH THE ARTS		
	Men (n=557)	Women (n=569)	18-34 (n=348)	35-54 (n=386)	55+ (n=426)	Immersed (n=95)	Active (n=295)	Passives (n=561)
Cost is too high	21% ↓	40% ↑	39% ↑	28%	25%	32%	36%	29%
Involved in other activities	35% ↑	22% ↓	17% ↓	30%	35%	40%	40% ↑	29%
Other areas I want to focus on/more important things	26%	22%	27%	27%	19%	32%	19%	28%
Not interested in the activities	29% ↑	14% ↓	21%	22%	23%	16%	13%	20%
Not aware of opportunities to do those things	15%	21%	26% ↑	14%	14%	36%	21%	16%
Not a creative/artistic person	18%	15%	16%	17%	16%	4%	9%	19%
No reason – just never considered it	16%	10%	10%	12%	17%	16%	12%	12%
I don't know where to start	14%	12%	21% ↑	16%	6% ↓	12%	16%	15%
Classes/activities are never available when I want/need them	9% ↓	19% ↑	17%	17%	9% ↓	12%	18%	15%
Locations are not easy to get to	8%	13%	10%	5%	13%	0%	14%	10%
I don't like or gravitate to the arts	10%	4%	5%	9%	7%	0%	0% ↓	5%
Health concerns	4%	8%	5%	5%	7%	4%	10%	5%
Transportation to get to activities is a challenge	3% ↓	9% ↑	6%	4%	7%	8%	9%	4%
Not accessible for me	4%	7%	8%	4%	5%	12%	5%	6%
Special accommodations (for disability, special needs, etc.) are not available	1%	2%	0%	3%	1%	4%	2%	1%

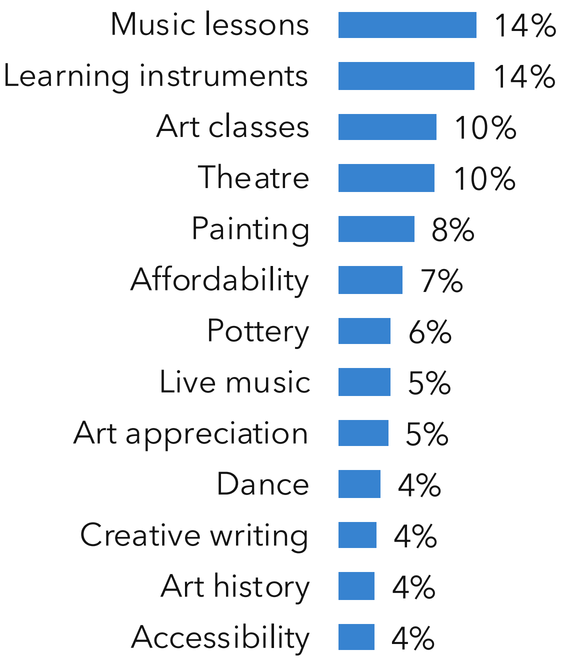
Base: Have not participated in arts related activities or experiences in the past two years (n varies)
Q12. Which of the following best describes why you personally have not participated in any of the listed arts related activities or experiences?

↑ Significantly higher
↓ Significantly lower

Most mention specific art forms as what they are looking for with arts education

However as most of these are likely available in some form, it suggests awareness might be a more prevalent issue than availability.

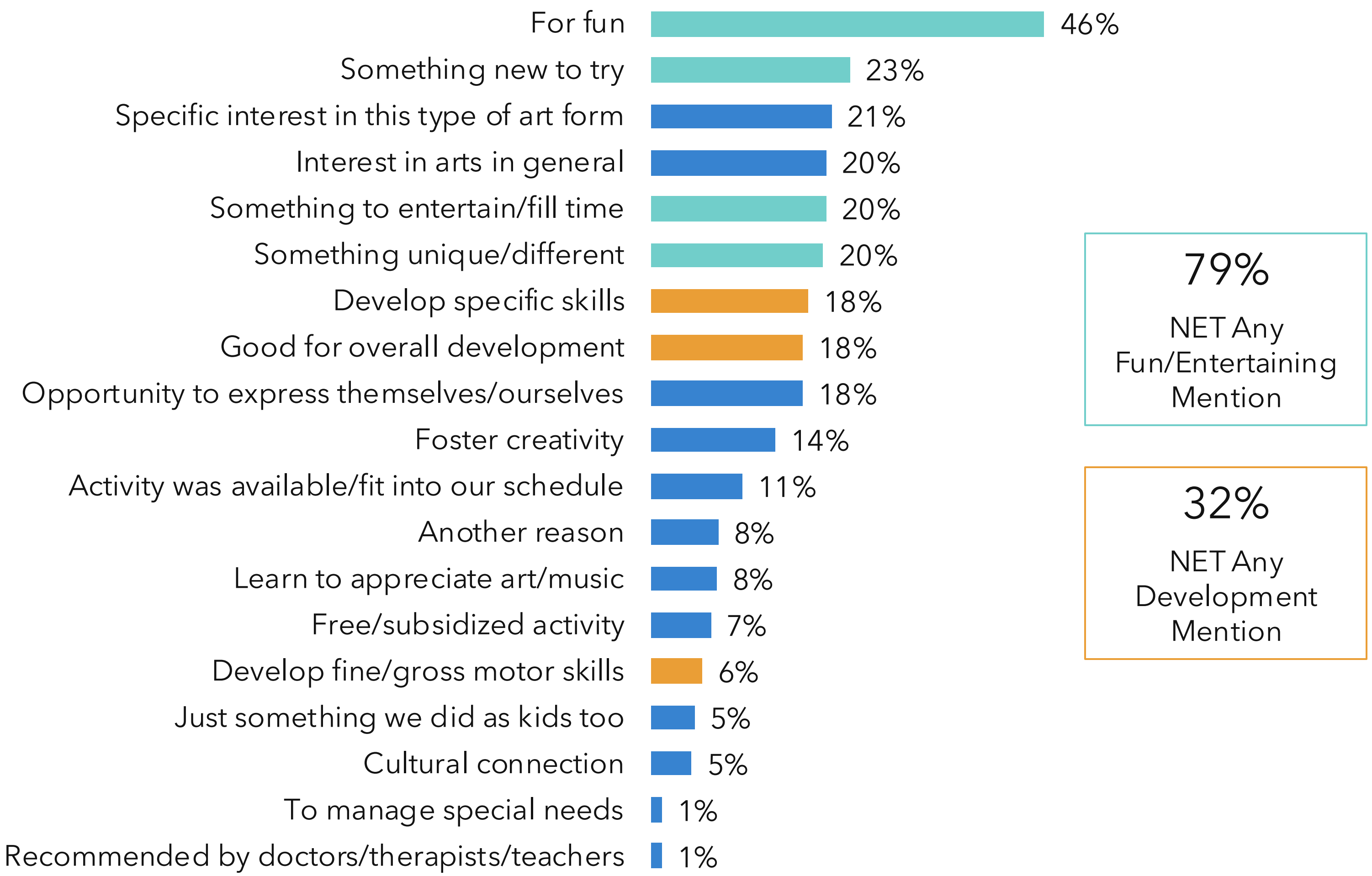
Desired arts education experiences
(mentions of 4% or more)



Base: All respondents (n=1,160)
Q16. What types of arts education experiences, if any, do you wish were available to you and/or your family? This could be anything – playing or learning an instrument, general learning about art or music history, trying or learning about a new art form, art appreciation class, theatre, etc.

The idea of having fun and participating for entertainment reasons is of superior importance for adults compared to development

Reasons for participating in arts education – % selected (top 3)



Base: Participated (personally or children) in arts related activities or experiences in the past two years (n=655)
Q14. What are some of the MAIN reasons [you/your child(ren)/you and your child(ren)] participated in the arts related activities or experiences selected? (select up to three reasons only).

Messaging focused on 'fun' will be especially important to increase adult participation

Stone Olafson

% Selected (top 3)	You personally (n=414)	You and your children (n=125)	Your children (n=116)
For fun	50% ↑	38%	38%
Something new to try	26%	17%	19%
Specific interest in this type of art form	23%	14%	20%
Interest in arts in general	20%	28%	14%
Something to entertain/fill time	23%	18%	14%
Develop specific skills	21%	14%	15%
Good for overall development	12% ↓	29% ↑	27% ↑
Opportunity to express themselves/ourselves	14% ↓	28% ↑	18%
Foster creativity	13%	22% ↑	12%
Something unique/different	14%	8%	8%
Activity was available/fit into our schedule	10%	10%	13%
Program looked interesting/unique	12%	6%	8%
Learn to appreciate art/music	4% ↓	17% ↑	11%
Free/subsidized activity	5%	8%	11%
Develop fine/gross motor skills	3% ↓	13% ↑	9%
Just something we did as kids too	3% ↓	7%	9%
Cultural connection	7% ↑	3%	0% ↓
To manage special needs	1%	4% ↑	0%
Recommended by doctors/therapists/teachers	1%	1%	1%

Messaging for children should also prioritize fun, but should include a stronger focus on development and fostering creativity than messaging for adults.

	You personally (n=414)	You and your children (n=125)	Your children (n=116)
Net Any Fun/ Entertaining	79% ↑	65%	59% ↓
Net Any Development	32% ↓	51% ↑	42%

Base: Participated (personally or children) in arts related activities or experiences in the past two years (n=655)
Q14. What are some of the MAIN reasons [you/your child(ren)/you and your child(ren)] participated in the arts related activities or experiences selected? (select up to three reasons only).

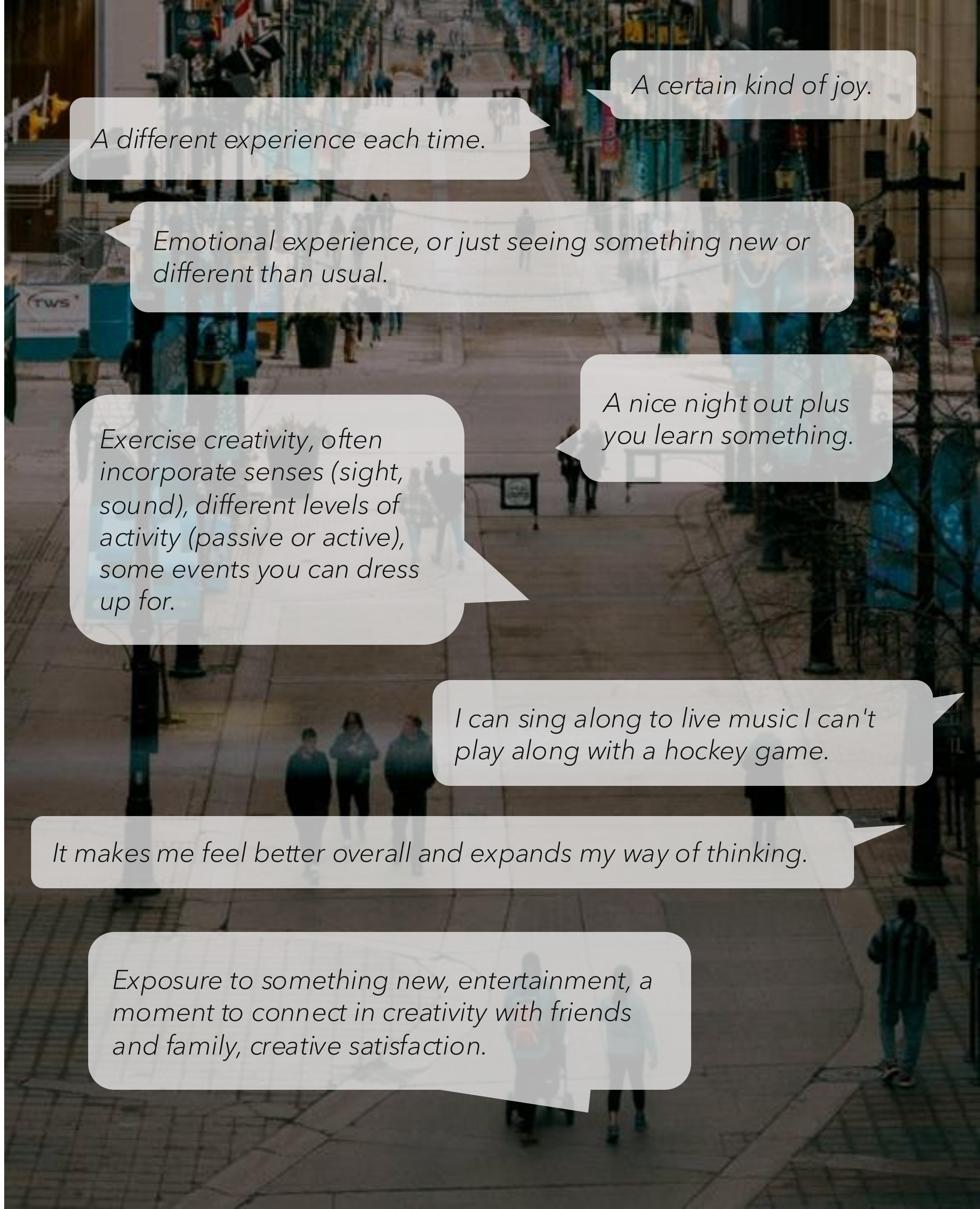
↑ Significantly higher
↓ Significantly lower

The combination of benefits and personal development is what makes art experiences different than other activities

Personal outcomes from experiencing/participating in arts

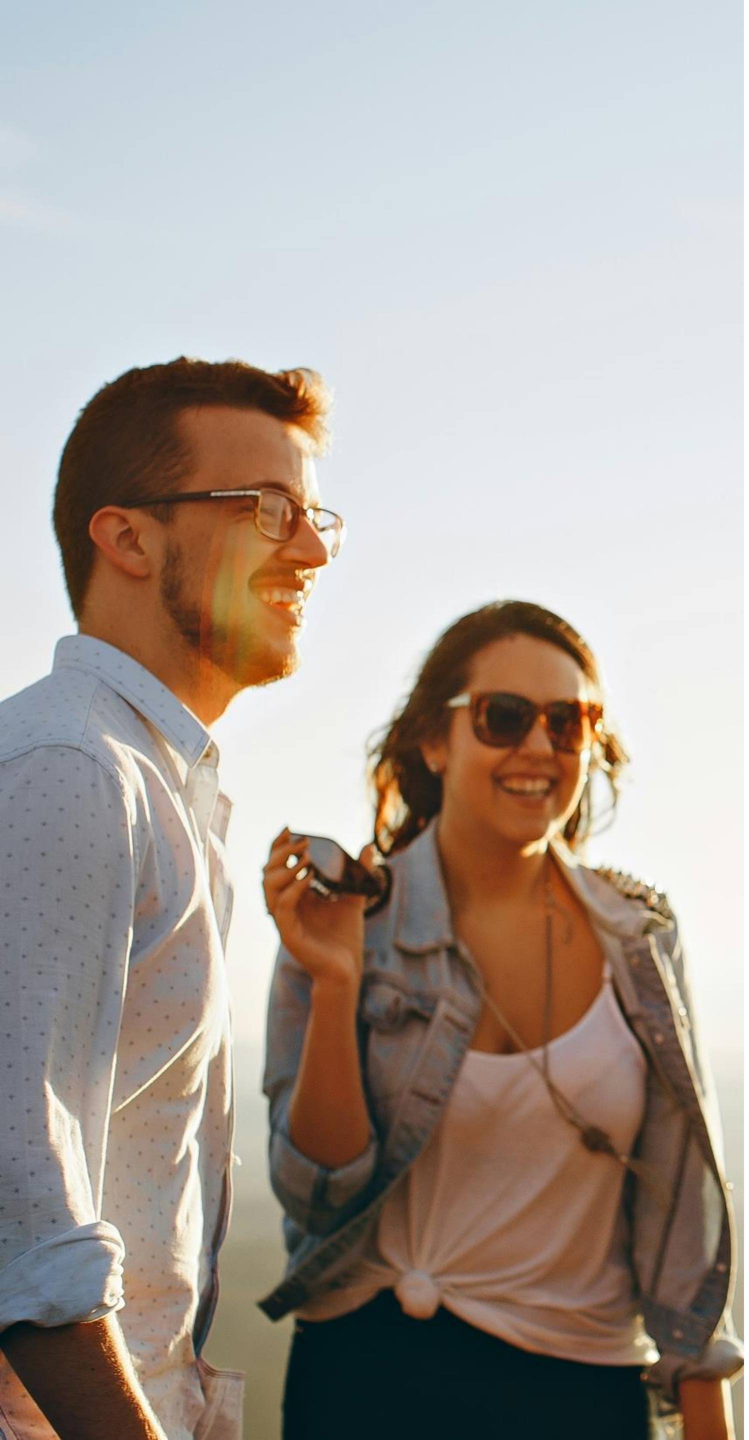
Mentions of 4% or more

Base: Respondents who provided an answer (n=1,030)
Q32. What is it that you personally get out of attending an arts related experience or participating in an arts related activity that you do not get from other types of experiences/activities? (This could be anything.)



Stone — Olafson

Understanding Spending and Affordability



Stone — Olafson

The context of affordability is important to understand

Personal finances have become a social flashpoint impacting many areas of our community. The cost of living remains the top issue in the national and provincial agenda and housing affordability is not far behind. Both are on par with the perennial issue of access to health care. We continue to investigate spending habits and attitudes and learned 48% of our audiences feel like they are 'just getting by' financially or 'falling behind.' This has grave implications for spending on experiences, as audiences will continue to think about cost as they consider whether to engage with arts experiences.

The good news is Albertans do have a propensity to spend. It is important to recognize that ability to spend on discretionary experiences has slowed for many, but audiences *are* spending. In fact, just over a quarter of their discretionary spend is spent on arts experiences. And if they are spending on arts experiences, they are likely to spend more in the coming year. Some key factors to consider:

- Cost is not the only consideration – less than 1% cite it as the ONLY barrier. They are looking at multiple factors in their decision. That makes the issue more about value than it is about price per se.
- Consumers are first compelled to consider the experiences or activities before deciding on whether to spend the money to engage or not. It is a strong reminder that organizations have to show it's worth it to spend what time and money they have by making experiences easy, attractive, social and timely.

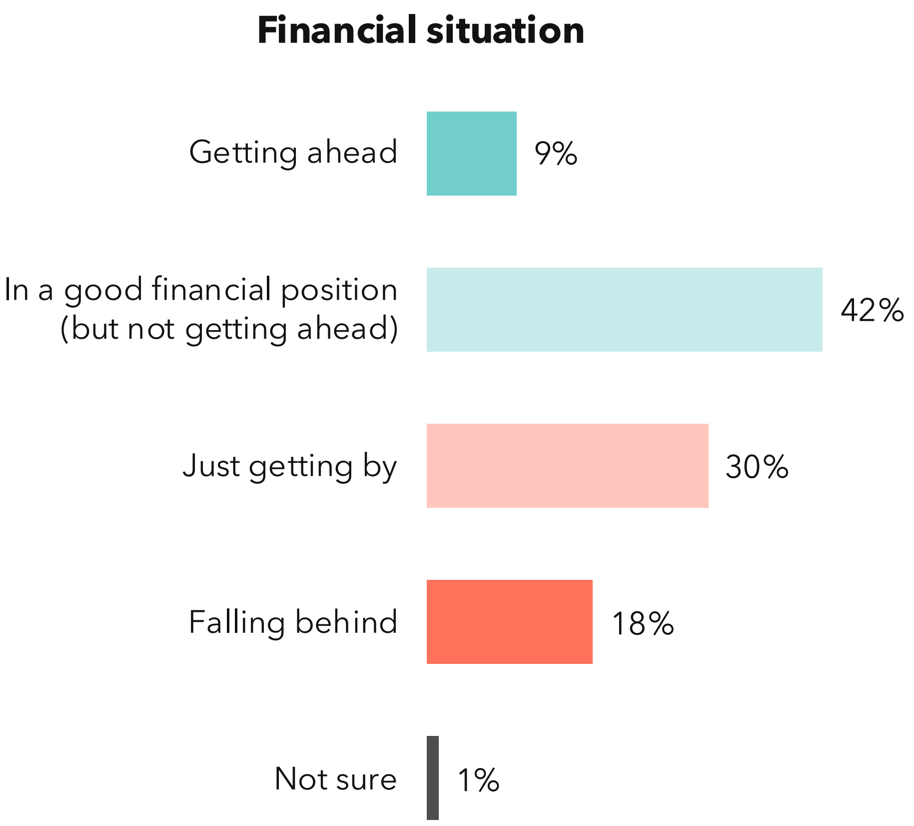
Show value to compete with other entertainment options

Consumers are not deciding on what to engage with by looking at price alone. Instead, they focus on making decisions based on value and how they can fit it into their budget. In short, they are more selective and are starting their decisions first with an inspiration of the experience they might enjoy. Ultimately, the conversation around value often has little to do with cost:

- Avoid leading with messages about price or cost. This part of the decision comes later and most won't even consider the cost unless the experiences align to motivations or interests. The financial considerations are a very important secondary message to seal the deal.
- It is critical to make the experience attractive so audiences understand the offering is 'worth it'. Reminding audiences of the emotional benefits, sharable experiences, and uniqueness is going to be key in driving engagement. The variable of enjoyment cannot be overlooked.
- Easy is critical. Provide flexibility and options with offerings. Often audiences prefer to spend on multiple activities (rather than one larger activity) and search for options that fit into their budget. Are there variations or levels of experiences to offer? Easy may also mean helping curious audiences feel more comfortable if they are uncertain.

Financial situations can be described as stable or struggling

Just under one-in-ten feel they have 'extra' and can get ahead when it comes to finances. This leaves a sizeable proportion who are 'just getting by' or 'falling behind'. It also serves as a reminder of Albertans' mindset while facing challenging economic conditions and gives insight into how they will spend.



Those who are getting by or falling behind tend to have a **strict budget** and have a specific amount they want to spend on activities and are more thoughtful when selecting what fits into the budget. Show them the value.

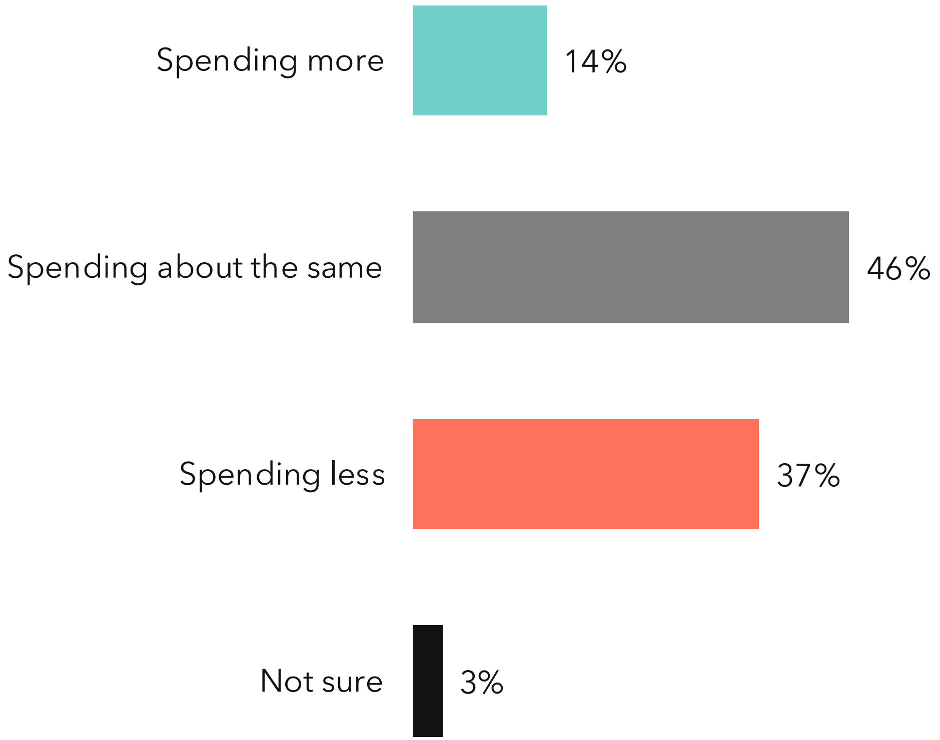
In addition, they seek out **flexibility and options** when it comes to activities. They prefer many activities at a lower cost over one more expensive activity and are less likely to prefer to make a commitment in advance.

Base: All respondents (n=1,160)
Q36. Thinking about your own financial situation and the overall cost of living, are you...?

More than half are spending the same or more on discretionary activities than last year

The challenges with Albertans' spending is a startling issue many organizations face. But Albertans ***are*** spending. They are making very informed and sensible decisions on which activities they will engage in by looking at the value. As an arts organization, it is critical to show Albertans your offerings are 'worth it'.

Spending on discretionary experiences/activities
(compared to a year ago)



Who is spending more?

- Albertans ages 18-34
- Families
- Higher household income
- Arts-immersed Albertans

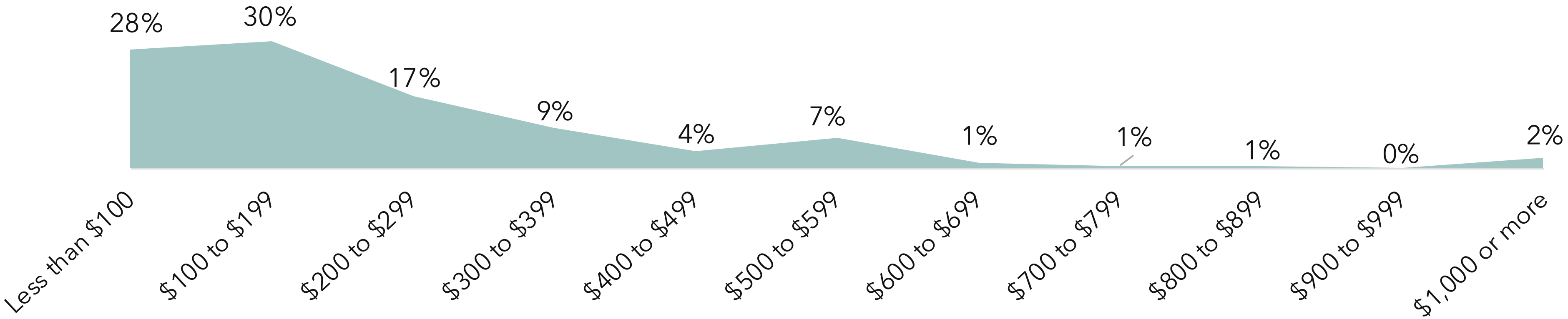
Base: All respondents (n=1,160)
Q18. Thinking about your current situation compared to this time last year and spending on discretionary activities and experiences, are you…?

Overall, personal spend on discretionary entertainment is moderate

Stone — Olafson

How much do you spend on any experiences?

$204 average monthly spend on experiences.



Discretionary activities defined as: Any discretional activity, experience, or thing to do outside of your regular expenses or financial obligations (mortgage, rent, groceries, transportation, debt, etc.). This could include spending on dining, recreation, classes you take, activities, arts and culture, concerts, arts creation you may do, dance, etc. - per month on experiences

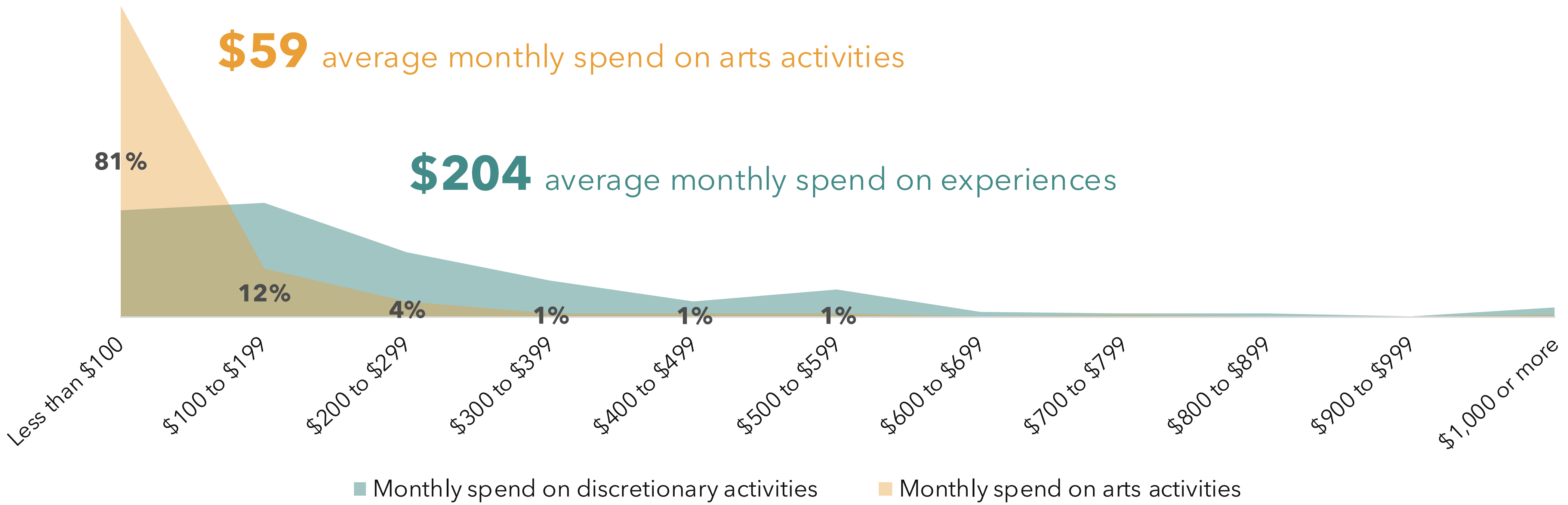
*Data reflects self-reported spend
Base: Respondents who spend on discretionary experiences (n=979) – outliers removed
Q17. The next few questions ask you about spending on experiences. Overall, how much would you estimate you spend every month on EXPERIENCES

Arts activities account for over a quarter of all experience related spending

Stone—Olafson

Those who are falling behind or just getting by are spending less overall. But with those who are falling behind, there are indications the proportion they spend on arts is *slightly more* than those in a better financial position. This stresses the need to focus on opportunities that allow **all** Albertans to connect with and see themselves as active members in the arts community.

How much do you spend on arts activities?



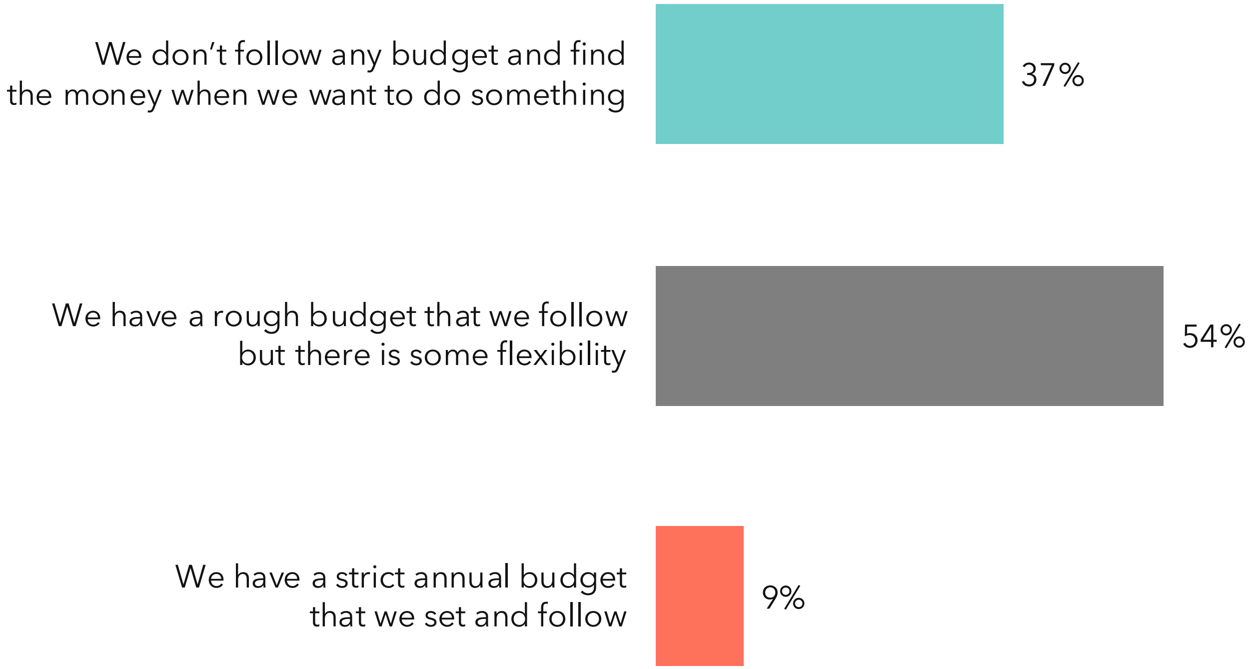
Arts and culture activities/ experiences could include music, concerts, cinema, performances, theatre, museums, galleries creative writing, arts classes of any kind, cultural festivals, and other similar activities/experiences.

*Data reflects self-reported spend
Base: Respondents who spend on discretionary and arts experiences (n=887) – outliers removed
Q17. The next few questions ask you about spending on experiences. Overall, how much would you estimate you spend every month on EXPERIENCES?
Q19. When you think about all the discretionary experiences and activities and experiences you spend on, about what percent is for arts and culture related activities/experiences?

Many budgets aren't strict – there is flexibility and an open-mind with budgeting

This is not just about spending, but rather how arts experiences fit into their budget. Asking Albertans to invest in a membership or long-term monetary commitment might be a challenge, but activities with flexibility could be more appealing.

Budget for discretionary experiences and activities

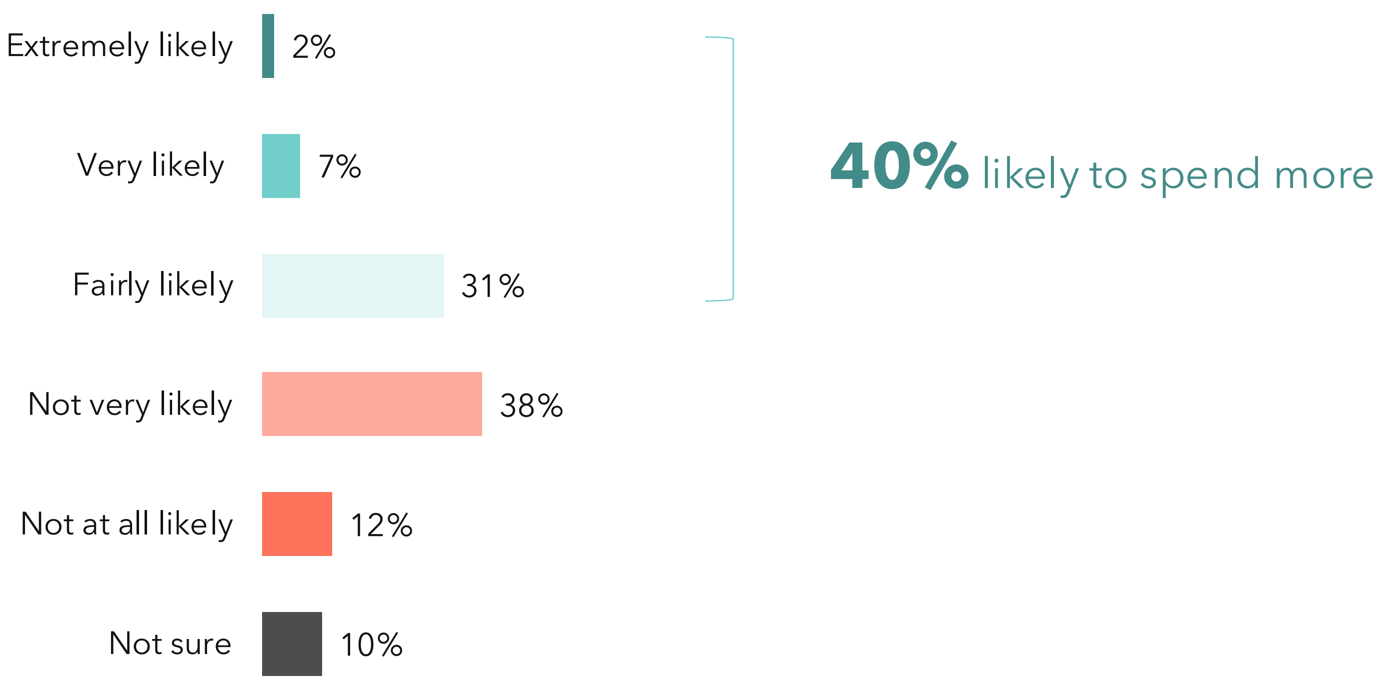


Base: All respondents (n=1,160)
Q21. Which of the following best describes how you decide on spending on discretionary activities and experiences?

Spending on arts experiences is unlikely to grow significantly in the next year

While 40% express some interest in spending more on the arts in the year ahead, only 9% are very likely to increase their spend. Importantly, spending is most likely to happen from those who've already put money in – meaning organizations will be likely collecting more from those who are already attending instead of more spending from new audiences.

Consideration to spend MORE on arts experiences



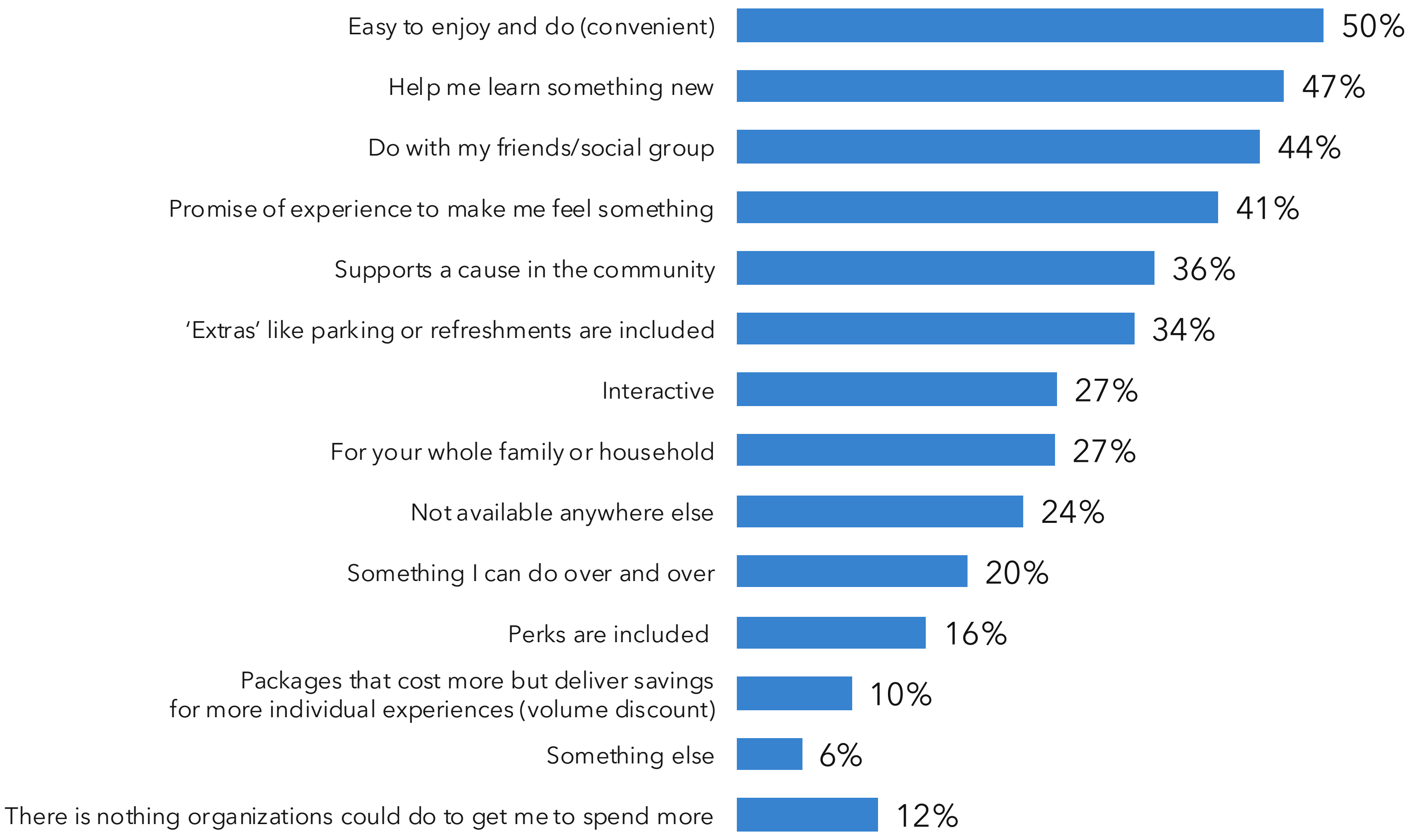
Base: Respondents who stated spending less than 100% of total discretionary spend on arts experience (n=1,118)
Q22. Earlier you indicated you spend about [QID19-TotalSum]% of your discretionary budget on arts related experiences and activities. How likely are you to consider spending more than that in the year ahead on arts experiences?

Consider messages about simplicity, being interesting, or catered towards social motivations to increase spend

Stone — Olafson

Ease and flexibility are now fundamental for any activity; these elements are critical for the early stages of consideration. Consumers need to hear about the benefits and be able to see themselves engaging with your activity. Pure enjoyment and being able to share the experience with others can be very powerful as well.

Messages to increase consideration to spend more on arts experiences/activities

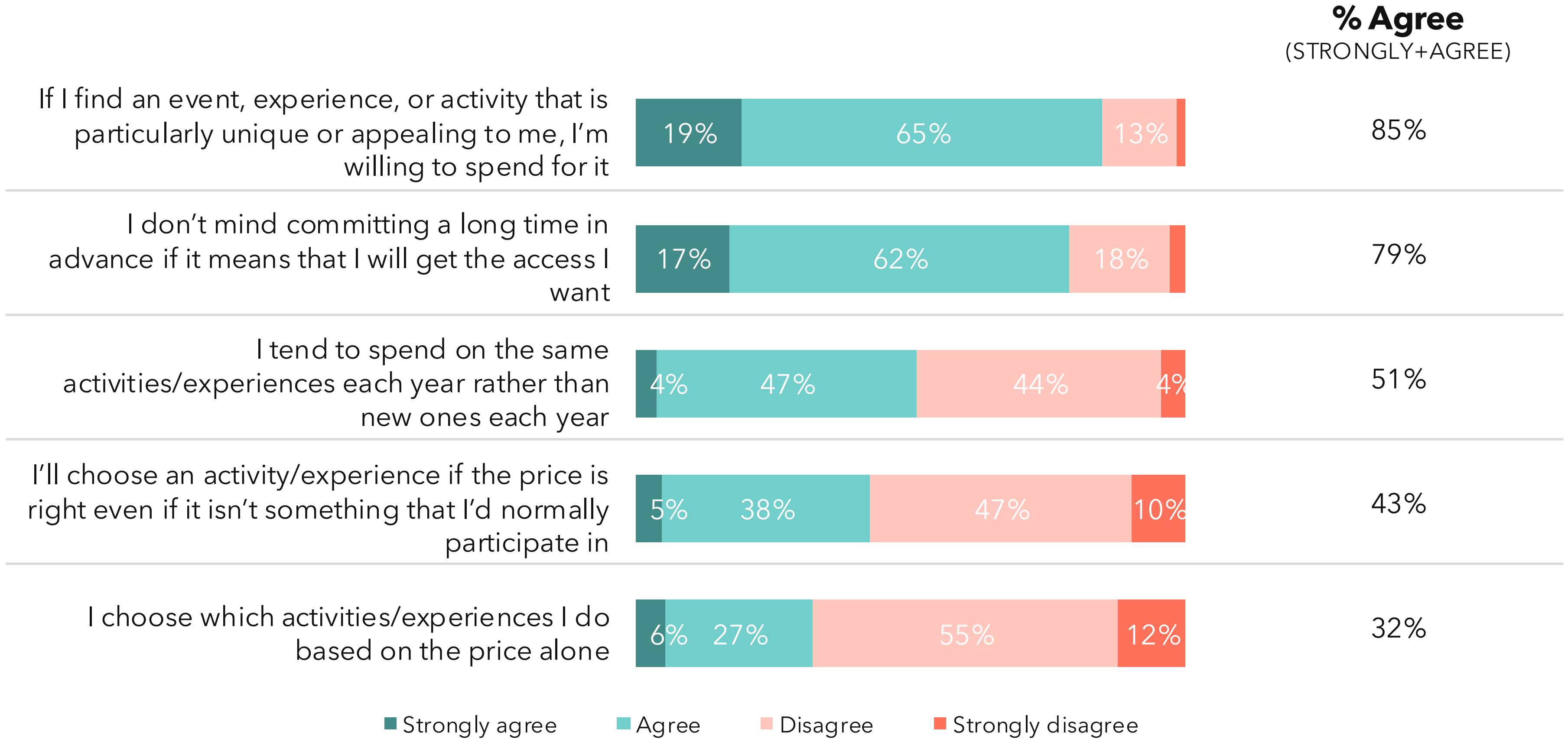


Base: All respondents (n=1,160)
Q23. There are different things organizations could say, offer, or do to get consumers, like yourself, to spend more. Which of the following would get you to consider spending more on arts related activities and experiences in the year ahead? Select all that apply.

Stone—Olafson

Albertans are willing to spend, but it has to be 'worth it' for them

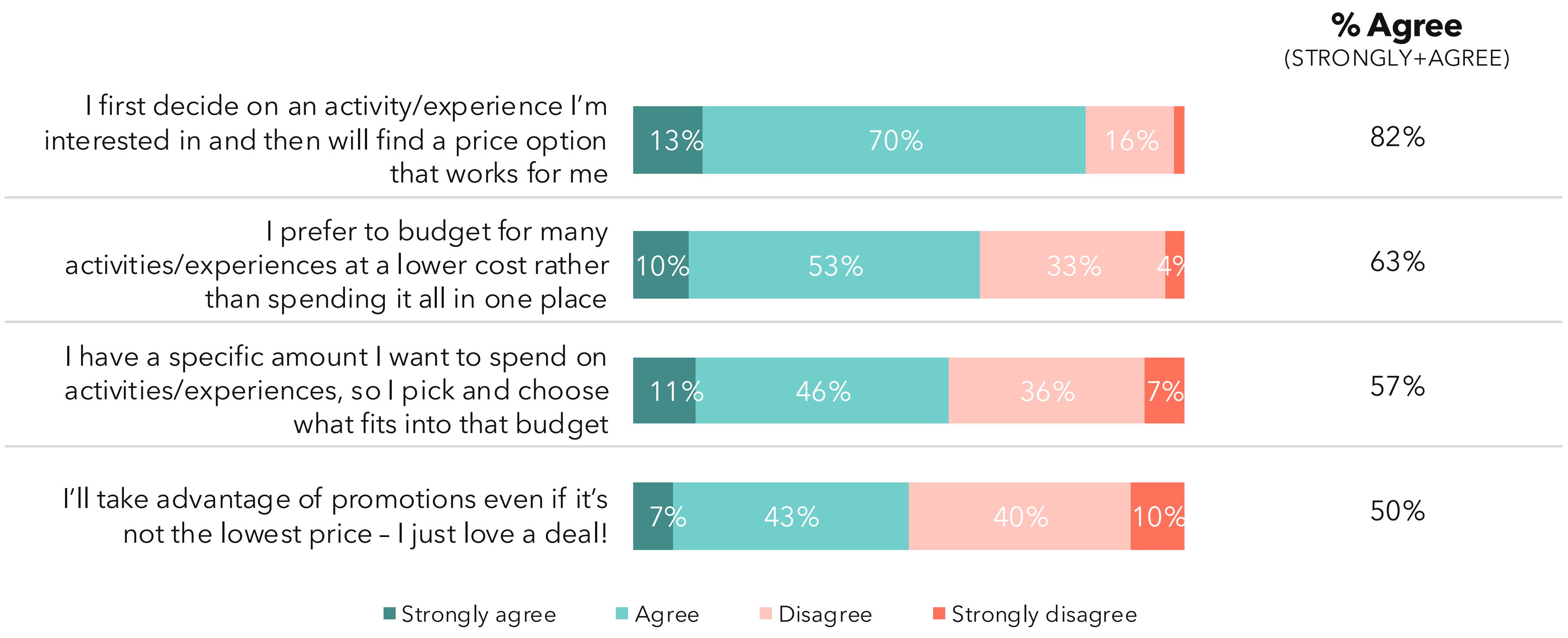
Consumers in this market are budget conscious and hesitant, but they are willing to spend if an activity stands out or feels right for them – price is rarely the sole decision criteria. There is an ongoing tension between financial constraints they face at home and a desire to engage with experiences. This reinforces the priority to communicate the value of an experience – the 'why' messages that speak to intrinsic motivations.



Base: All respondents (n=1,160)
Q20. Below are a few things people might say about how they decide which activities and experiences to spend money on. Please tell us if you agree or disagree with each one.

Flexibility and offering options has a wide appeal, especially to those who are more budget conscious

When Albertans see value in an activity, they want to find a price option that fits within what they are able to spend. This is not a matter of first assessing if they can spend, but rather, the opposite. Similarly, with a tighter wallet, there is appetite for a variety of experiences rather than committing a larger share of wallet to one experience. Because of this, considering how to offer affordable options will be key to fostering greater engagement.



Base: All respondents (n=1,160)
Q20. Below are a few things people might say about how they decide which activities and experiences to spend money on. Please tell us if you agree or disagree with each one.

Tapping into social motivations is important for women and younger Albertans

Stone — Olafson

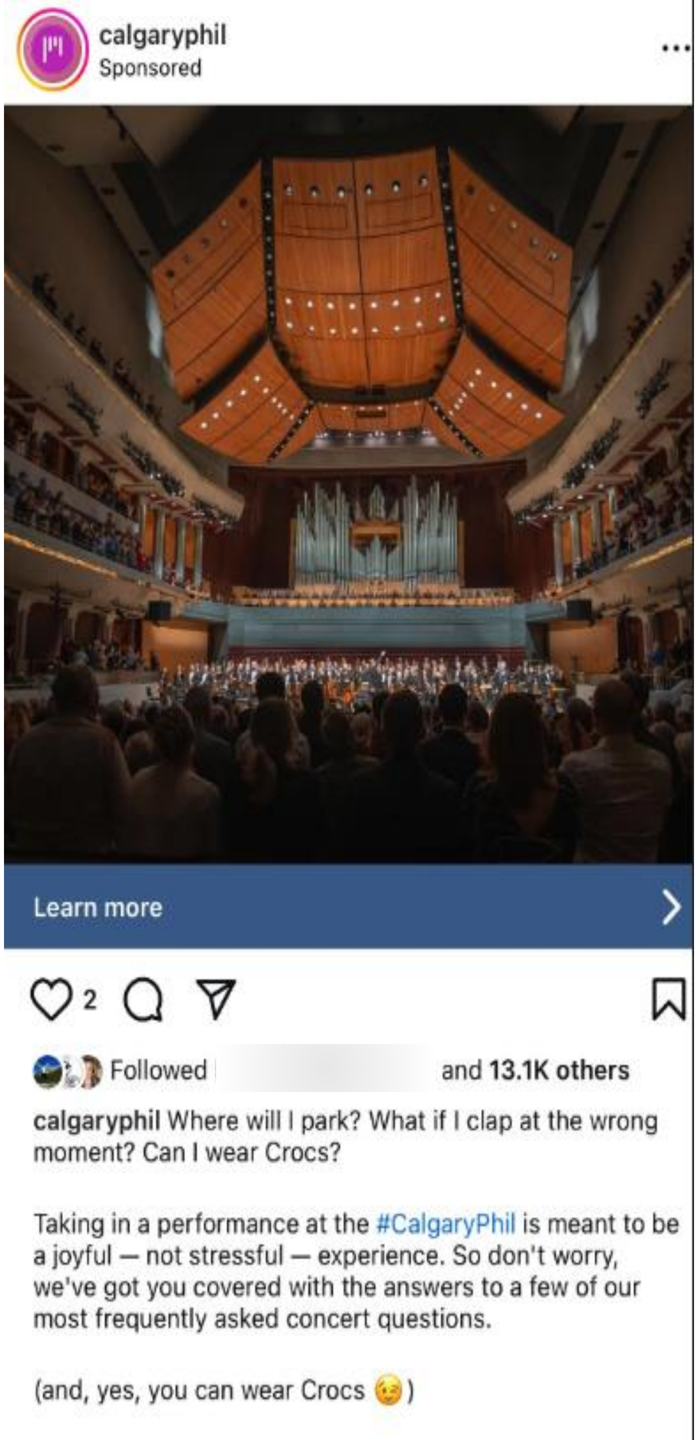
Messages to increase consideration to spend more	GENDER		AGE			ENGAGEMENT WITH THE ARTS		
	Men (n=557)	Women (n=569)	18-34 (n=348)	35-54 (n=386)	55+ (n=426)	Immersed (n=95)	Active (n=295)	Passives (n=561)
Activities/experiences that are **easy to enjoy and do (convenient)**	41% ↓	59% ↑	49%	52%	49%	48%	58% ↑	52%
Activities/experiences that **help me learn something new**	44%	50%	46%	48%	46%	61% ↑	53%	47%
Something that I can **do with my friends/social group**	38% ↓	51% ↑	53% ↑	40%	41%	55%	54% ↑	44%
The **promise of experience that will make me feel something** – laughter, surprise, etc.	40%	42%	36%	41%	45%	58% ↑	48% ↑	41%
Something that also **supports a cause** in the community	30% ↓	40% ↑	34%	36%	37%	46%	46% ↑	34%
Activities/experiences where **'extras' like parking or refreshments are included**	31%	36%	39%	33%	30%	40%	38%	34%
Activities/experiences that are **interactive**	24% ↓	31% ↑	34% ↑	33% ↑	17% ↓	37%	34% ↑	26%
Activities/experiences for **your whole family or household**	26%	29%	24%	39% ↑	19% ↓	29%	35% ↑	25%
Activities/experiences that are not **available anywhere else**	25%	22%	33% ↑	27%	14% ↓	35%	35% ↑	23%
Something I can **do over and over**	18%	22%	23%	20%	17%	33% ↑	23%	19%
Activities/experiences where **'perks' are included** (meeting artists, exclusive reception, etc.)	17%	16%	19%	19%	12% ↓	23%	21%	15%
Packages that cost more but deliver savings for more individual experiences (**volume discount**)	8%	11%	13%	11%	6% ↓	16%	13%	9%
There is **nothing** organizations could do to get me to spend more	16% ↑	8% ↓	7% ↓	12%	15% ↑	4%	5% ↓	10%

Base: All respondents (n=1,160)
Q23. There are different things organizations could say, offer, or do to get consumers, like yourself, to spend more. Which of the following would get you to consider spending more on arts related activities and experiences in the year ahead? Select all that apply.

↑ Significantly higher
↓ Significantly lower

Stone — Olafson

Decision Making and Last-Minute Activities



Investigating how and when decisions are being made

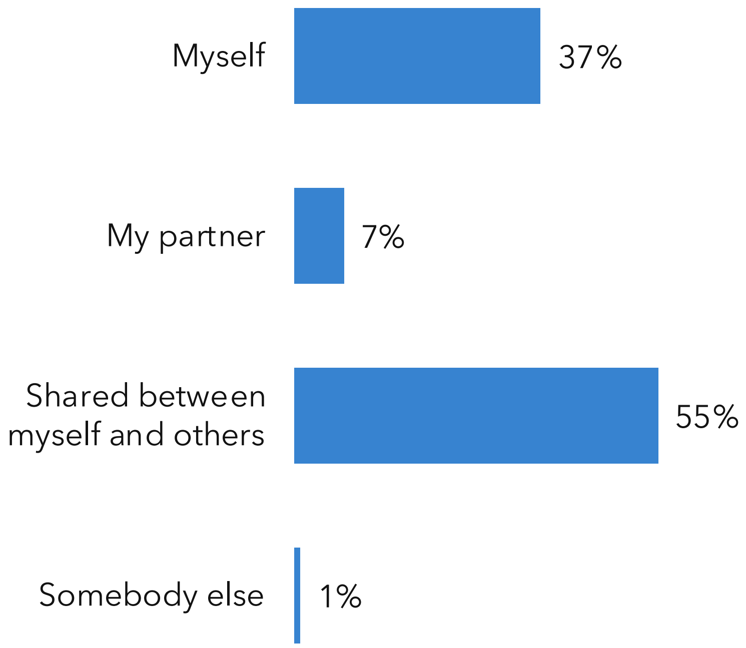
Over the past few years, the process of making decisions about experiences has been changing. Where consumers used to have a fairly reliable decision journey, the pandemic changed the landscape and purchase decisions appear to be coming much later than they used to. What is clear from results is that while consumers may be making later decisions, they are not making what they say are impulse choices.

- **Less than one-in-four are making what they think are last-minute decisions**. Of all the decisions Albertans make about participating in experiences, 78% are decisions they've made in advance. Simply put, while they are not necessarily putting their money down earlier, most decisions to engage are made well before the event or activity.
- **Only 19% define an impulse decision in immediate terms.** Most decision makers have a longer-term definition and only 19% define 'last-minute' or 'impulse' as a decision they make in an hour or less before an experience. In fact, most (59%) are thinking in terms of a day or week before.
- **Decisions are shared, just like experiences.** While some may lead individually in doing the research, the vast majority (74%) share the final decision with other people in their household. Because the final decision to commit is shared, organizations will have to keep showing the shared benefits too (i.e., fun together, enjoyment together, something unique together, learn together, etc.)
- **Hassle and cost remain the most prominent barriers.** Not surprisingly, cost is the most frequently mentioned reason for not engaging, but it is rare (less than 1%) that cost is mentioned on its own. In fact, it is part of the equation for many and the 'hassle' factor is a prominent consideration as well. The importance of making it easy and/or showing how easy it is to engage has not diminished and making them comfortable if they are uncertain remains.

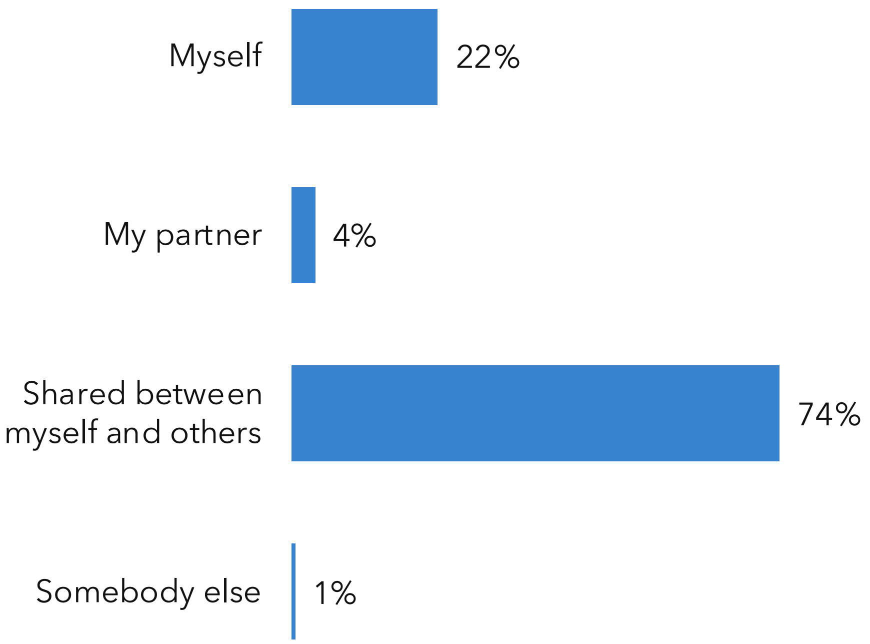
Research and decision making for experiences and activities is a shared task

More often women are doing research and making decisions, especially for family activities, but marketing efforts should speak to everyone based on how often decisions are shared with others.

% who does research on which experiences/activities to do



% who makes the final decision on which experiences/activities to do

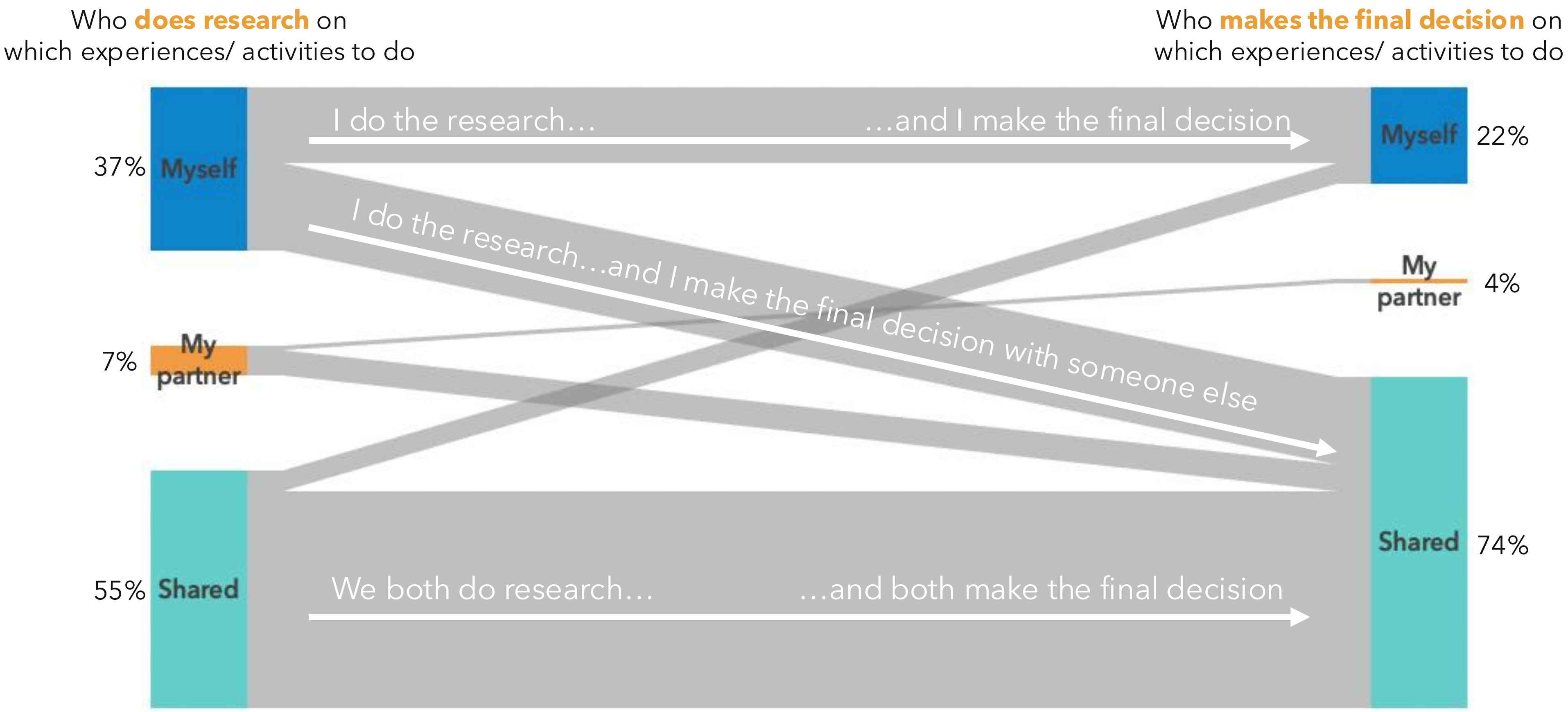


Base: Respondents who live with at least one other person (n=963)
Q25. In your case, who typically does the research and comes up with ideas on what activities and experiences you might do?
Q26. And how about the final decision? Who typically makes the final decision on what activities or experiences to do?

While individuals are often doing the legwork, the final decision on engagement is usually shared

Stone — Olafson

Marketing messages have to resonate with a wider audience but especially those who are most likely doing the research on their own (women) and particularly in family households.



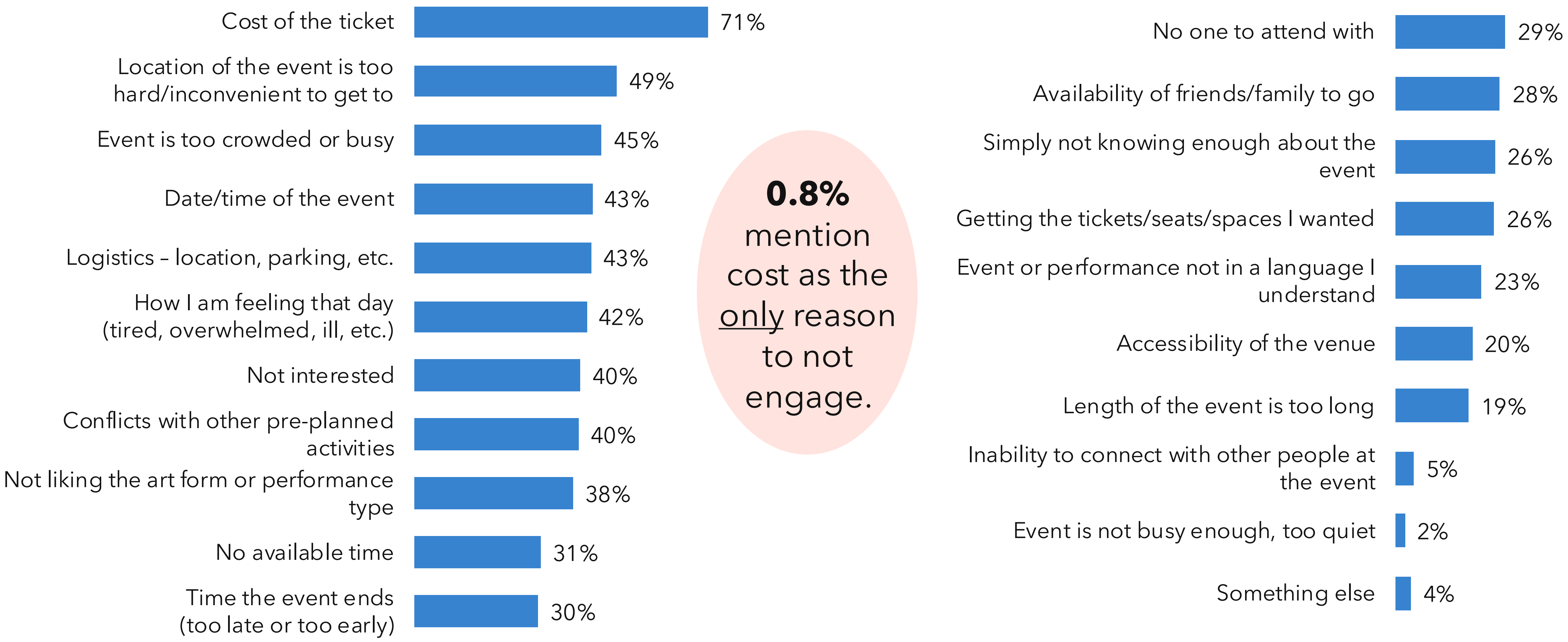
Base: Respondents who live with at least one other person (n=963)
Q25. In your case, who typically does the research and comes up with ideas on what activities and experiences you might do?
Q26. And how about the final decision? Who typically makes the final decision on what activities or experiences to do?

Stone — Olafson

Cost is a major consideration, but not the only barrier

Not surprisingly, cost plays a critical role. However, the overall hassle factor (convenience + crowded + logistics) is also a very prominent barrier

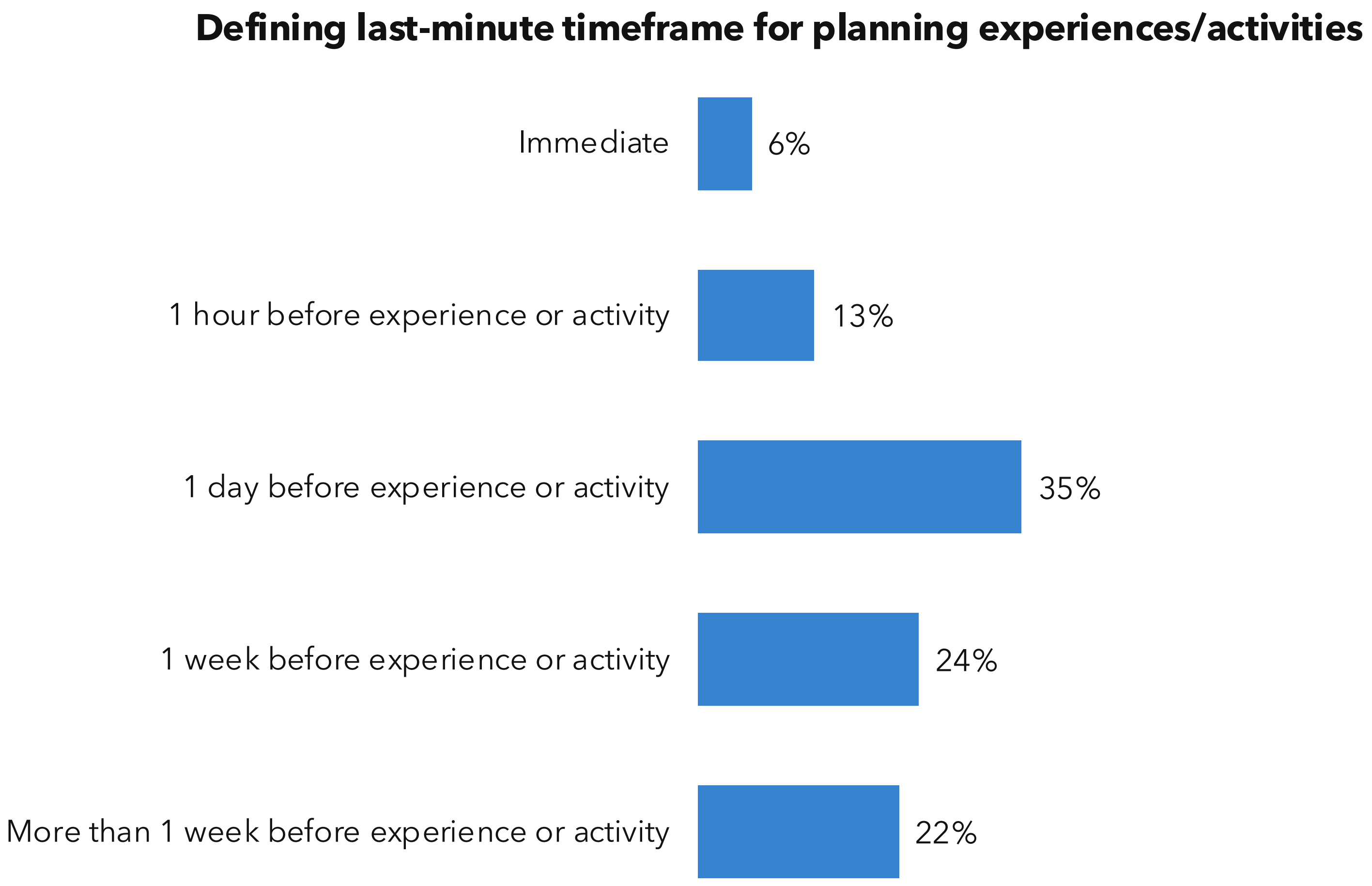
Barriers to participation



Base: All respondents (n=1,160)
Q31. Thinking about any decision, short or long term, that you make about attending events or participating in arts related activities/experiences, what are those things that are most likely to prevent you from going? This could be anything that stops you from making that final decision to attend or purchase tickets. Select all that apply.

Albertans' definition of impulse decisions are fairly elastic – only 19% think in immediate terms

Stone — Olafson



Definitions will vary depending on your audience:
- **Age:** Younger adults (under 35) are more impulsive while those over 55 see a week or more as last minute.
- **Engagement:** Less engaged audiences also use a longer time-frame and are more likely to think an impulse decision is more than a day out.

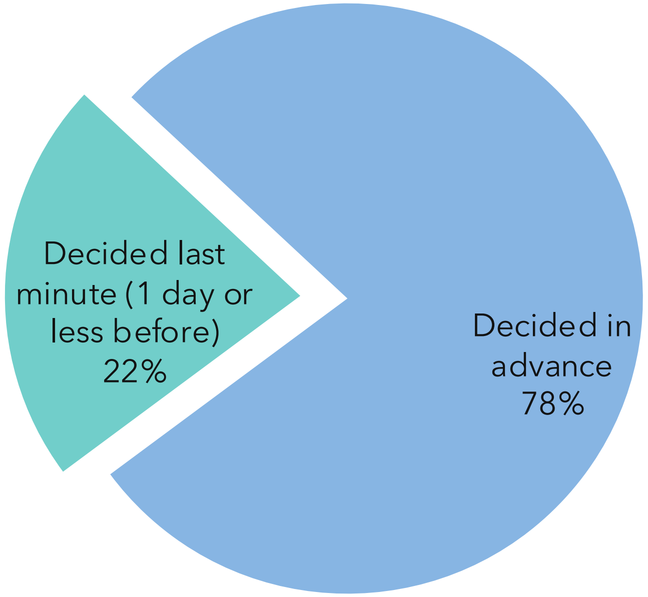
Base: All respondents (n=1,160)
Q27. Thinking about the timeframe in which you typically make decisions to participate in experiences or activities, what would you consider to be 'last minute' or an 'impulse' decision?

Albertans are mostly planners – they are deciding in advance almost 80% of the time

A variety of factors will impact the timing of a decision – besides awareness. Factors like availability of tickets, timing and cost are all things that will impact the planning behaviour.

Planning for all experiences/activities

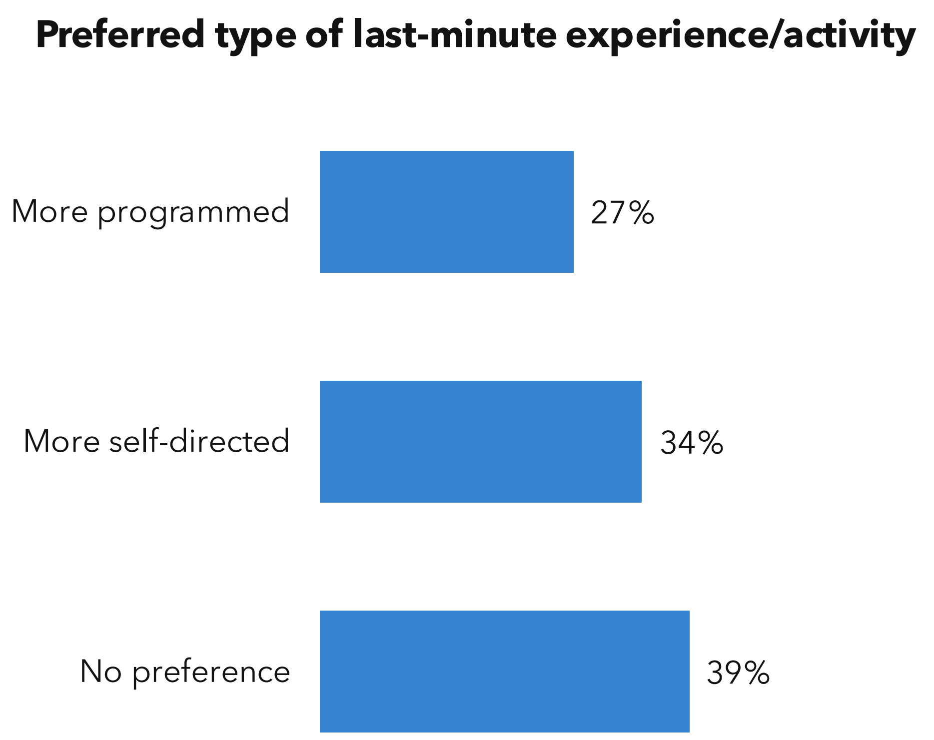
Impulse buyers are more likely to be less financially secure and are more passively engaged to arts experiences. They may be tougher to convert.



Planners are obviously more committed – they are more active or immersed, families with higher incomes.

Base: All respondents n (n=1,160)
Q28. When you think about all the experiences you typically engage in, what proportion are decided well in advance? How about last minute?

While there is some slight preference for self-directed activities, programming type does not appear to be a major variable in driving impulse decisions

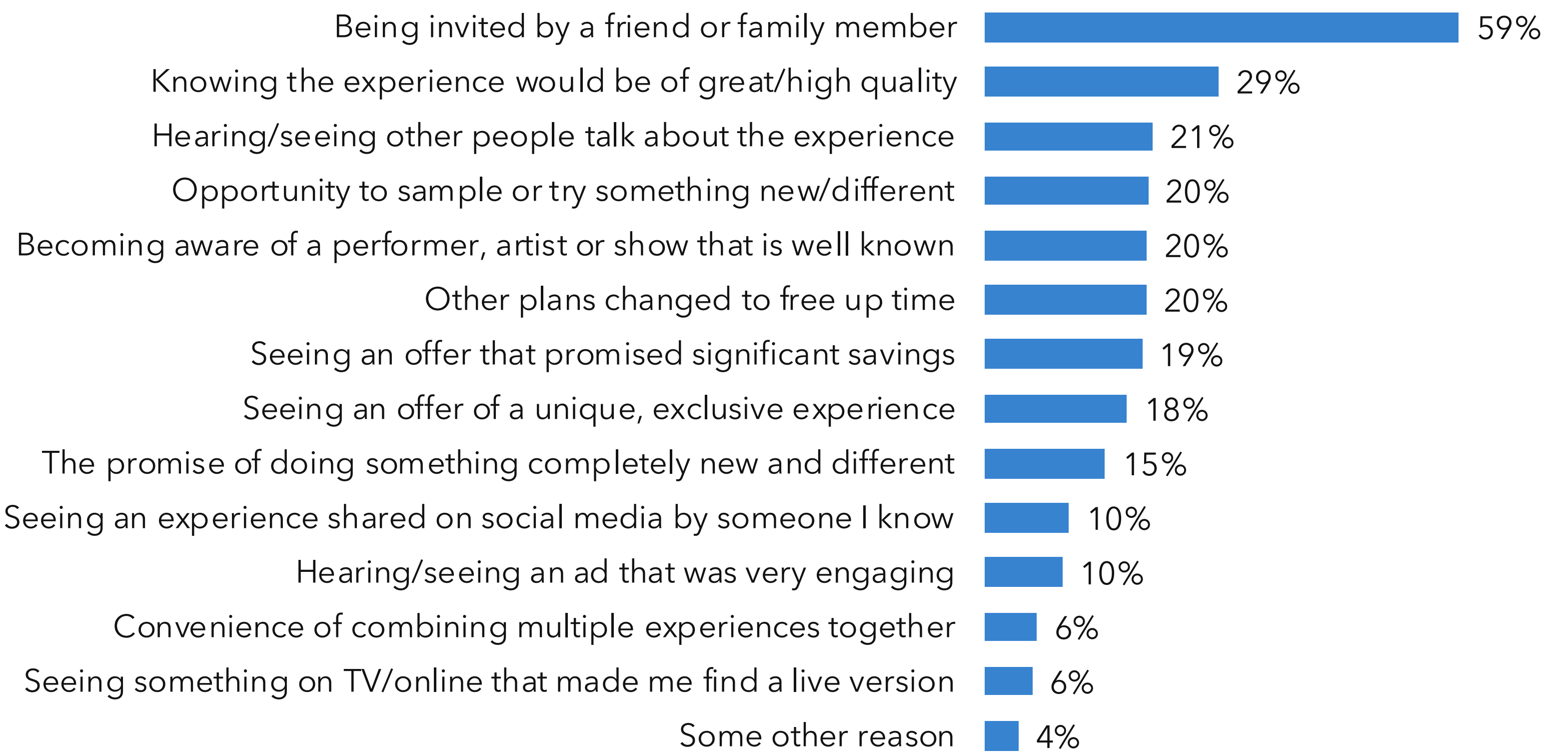


Base: Respondents who plant at least some activities as last-minute (n=996)
Q29. When you are thinking about doing something last minute (1 day or less before), are you looking for something that is more programmed for you (like a performance or show with a specific start and end time) or something that is more self-directed (like an art gallery or festival that you can explore on your own time)?

Awareness and opportunity will be THE factors inspiring impulse engagement

Stone — Olafson

Messages to inspire last-minute experiences/activities
Top 3 selections



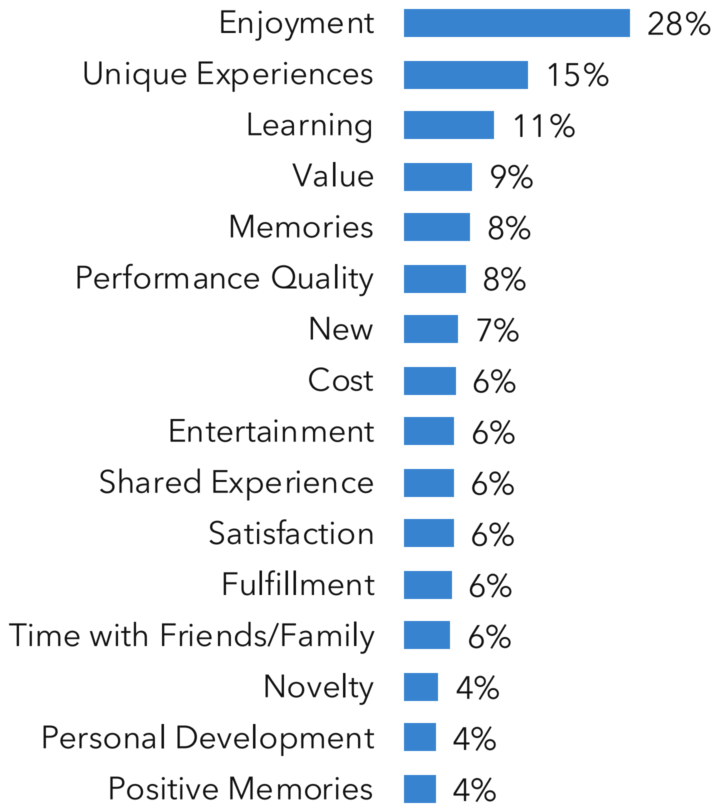
Creating exposure is obviously important – but so too is making the offer shareable, demonstrating quality and uniqueness.

Base: All respondents (n=1,160)
Q30. What is most likely to inspire you to do something at the last minute? Select up to three.

Tap into emotions to draw Albertans in and leave a lasting impression

Defining what makes an arts experience 'worth it'

Mentions of 4% or more



Base: Respondents who provided an answer (n=1,029)
Q33. What makes an arts experience or activity worth it (both in time and money)?

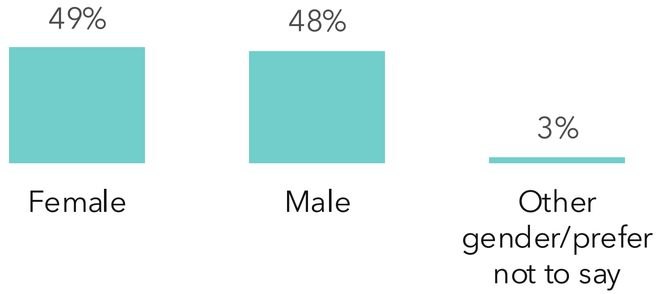
Stone —
Olafson

Respondent Profile

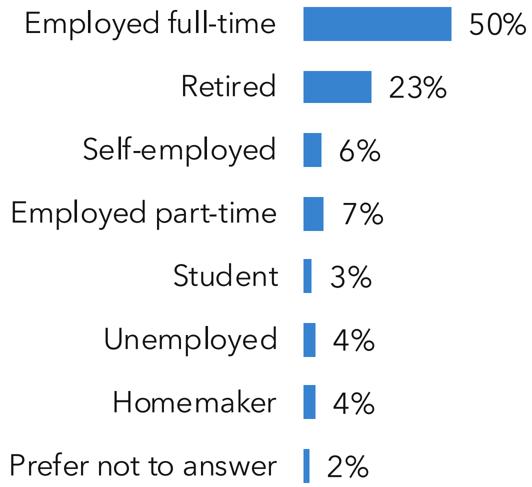
Stone — Olafson

Respondent Profile:
Who We Heard From

Gender

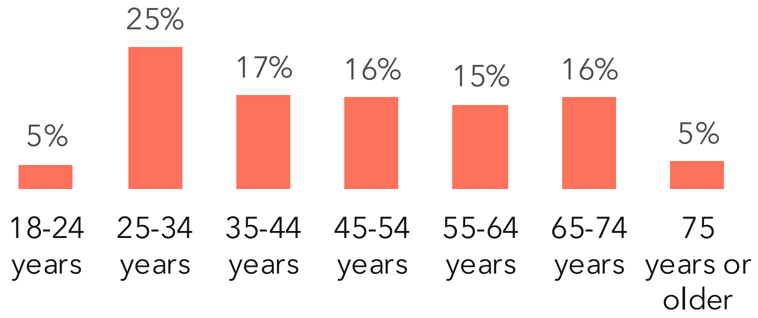


Employment

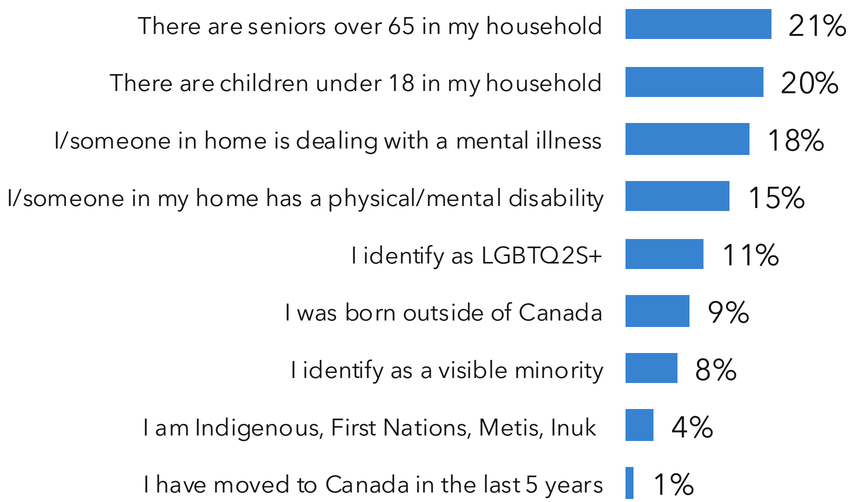


HH Income

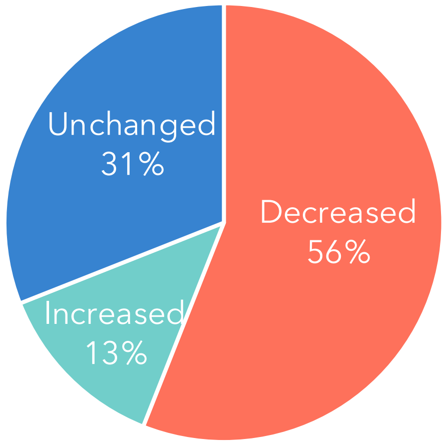
Age



Diversity/Identity



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
megan@stone-olafson.com
raquel@stone-olafson.com