

Cultural Trends, Stats and Gaps

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Presented by the
Association of Cultural Executives
Theatre Passe Muraille, May 4, 2005

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Topics for discussion

- Arts attendance and cultural participation
 - Implications, research gaps, Q&A
- Artists in Canada (Q&A)
- Research choices (time permitting)

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www.HillStrategies.com

- Free resources available via email and internet (*revamped www.hillstrategies.com soon!*)
- *Statistical Insights on the Arts* (10 so far!)
 - Who Buys Books in Canada?
 - Artists in Canada
 - 3 reports: National; Provincial / local; Visible minority, Aboriginal, immigrant artists
 - Volunteers, donors, cultural spending

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www.HillStrategies.com

- *Arts Research Monitor* (4th season)
 - www.artsresearchmonitor.com
coming in the fall



Other recent Arts Research Monitor topics...

- Creative people, classes and cities
- State of arts and culture organizations
- Intrinsic and instrumental benefits of the arts
- Arts advocacy
- Economic impact of the arts
- Canadians' views of charities



Hill Strategies Research

- Other arts research projects
 - *Statistical Profile of Artists in Ontario*
(Ontario Association of Art Galleries)
 - *Profile of Art Galleries in Ontario*
(Ontario Association of Art Galleries)
 - *Surveys of dancers in Canada*
(Dancer Transition Resource Centre)
 - *Reading at Risk*
(U.S. National Endowment for the Arts)
 - *State of Theatre for Young People in Ontario*
(Ontario Arts Council)



Predicting literature reading and non-reading

- A. Are you female?
- B. Did you attend an arts performance?
- C. Did you graduate from college/university?
- D. Did you visit an art museum?
- E. Is your family income \$75,000 or more?

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Predicting literature reading and non-reading

- Calculations:
 - If respondent is female, you guess that she read a novel, short story, play or poetry during the year.*
 - If respondent is male, you guess that he did **not** read a novel, short story, play or poetry.*
- Reading rate: Women 55%, Men 38%
- Correct: Women 55%, Men 62%
- Overall: correct 59% of the time

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Predicting literature reading and non-reading

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- C. Did you graduate from college/university?
- D. Did you visit an art museum?
- E. Is your family income \$75,000 or more?

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Predicting literature reading and non-reading

- A. Are you female? 59%
- B. Did you attend an arts performance? 67%**
- C. Did you graduate from college/university? 62%
- D. Did you visit an art museum? 67%**
- E. Is your family income \$75,000 or more? 58%

Source: Calculations based on data in *Reading at Risk* (U.S. National Endowment for the Arts)

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Predicting literature reading and non-reading

- Art museum and performing arts attendance are significant factors in literature participation
- Even adjusting for education, ethnicity, race and other factors.

Source: *Reading at Risk* (U.S. National Endowment for the Arts)

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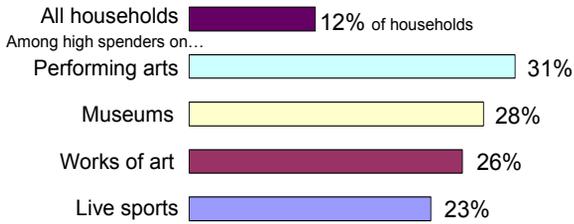
Predicting literature reading and non-reading

- Attend **both** an art museum and a performing arts event: nearly **6 times as likely** to read literature as those who participated in neither.
- Attend **either** an art museum **or** a performing arts event are **over 2 times as likely** to read literature as those who did neither.
- Those with a college (university) degree are **about 75% more likely** than high school graduates to read literature.

Source: *Reading at Risk* (U.S. National Endowment for the Arts)

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Canadian households spending more than \$200 on books



Source: *Who Buys Books in Canada?* Hill Strategies Research, *Statistical Insights on the Arts* series

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Arts attendance, volunteers and sports participants ("long distance" crossovers)

Crossover attendance and participation of performing arts attendees in Canada, 1998

	Art gallery attendance rate	Festivals attendance rate	Volunteer participation rate	Sports participation rate
Performing arts attendees	41%	41%	46%	47%
Non-attendees	14%	15%	27%	31%

Source: *Performing Arts Attendance in Canada and the Provinces*, Hill Strategies Research, *Statistical Insights on the Arts* series

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Arts attendance, volunteers and sports participants ("long distance" crossovers)

Crossover attendance and participation of art gallery visitors in Canada, 1998

	Performing arts attendance rate	Festivals attendance rate	Volunteer participation rate	Sports participation rate
Art gallery visitors	65%	43%	47%	47%
Non-visitors	29%	19%	30%	34%

Source: *Museum and Art Gallery Attendance in Canada and the Provinces*, Hill Strategies Research, *Statistical Insights on the Arts* series

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Performing arts crossovers ("short distance")

Who attended a theatre performance in 1998?

- An older, wealthy, university graduate, woman with a good career . . .
- OR
- Anyone who has been to a choral concert (knowing nothing else about them) . . .

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Performing arts crossovers ("short distance")

Who attended a theatre performance in 1998?

- Anyone who has been to a choral concert (knowing nothing else about them) . . .

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Performing arts crossovers ("short distance")

- Dance, music, theatre, opera, choral audiences show strong crossover patterns
- Three times greater predictive power than education, income, age, occupation, gender combined!

Source: *Snobs, Omnivores and Culture Vultures*, Presentation by Stephen Preece, Wilfrid Laurier University (*International Journal of Arts Management*)

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Average spending on consumer goods and services

High spenders on performing arts vs. others

- 65% more on household maintenance, repairs and replacement;
- 65% more on cellphone services;
- 134% more on garden supplies;
- 54% more on household appliances;
- 56% more on vehicle purchases; and
- 121% more on financial services.

→ Sponsorships

Source: *Performing Arts Spending in Canada* Hill Strategies Research, *Statistical Insights on the Arts* series

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Arts attendance and cultural participation – Key findings

■ High levels of crossover attendance and participation

- Within the performing arts
- Readers, art galleries, performing arts
- Volunteering
- Sports attendance and participation
- Frequent attendees are most likely to cross over disciplines; large share of audiences

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Crossovers – what's the significance?

■ Book marketing directed at arts (and sports?) attendees

- Bookmarks in theatre, opera, symphony programs

■ Arts marketing directed at literature readers, arts participants, sports attendees

- Brochures, etc. in libraries, reading series
- Readings in galleries, performance spaces

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Crossovers – what’s the significance?

- Cultural participants are socially-engaged
 - Organizations trying to develop their volunteer base should target cultural participants.
 - Given their level of social engagement, cultural participants might be more likely to vote than non-readers. But I have no proof of this.

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Crossovers – what’s the significance?

- Efforts to draw new readers or arts attendees could pay off in higher participation in a range of cultural activities
 - Enlarge the pie and many organizations can reap the rewards
- Interrelatedness of the arts

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Crossovers – An “arts bug”

- The divide between cultural participants and non-participants appears to be more significant than any other demographic factor.
- This is both bad news and good news:
 - Education levels rising: limited impact on cultural participation
 - Arts can attract people from various demographic groups

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Crossovers – An “arts bug”

- It appears that there is an “arts bug” that, once caught, keeps people coming back for more.
- How to spread the “arts bug” to more people?

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How to spread the bug?

Research findings have pointed to...

- Importance of community venues in initiating people to the arts
- Friends bring a friend
- Arts education

See the *Arts Research Monitor* for more details of these research findings.

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How to spread the bug?

- Collaborations between organizations
 - Make new alliances. Collaborate with other groups that have similar goals and clientele.
- Develop a better understanding of meaning, benefits and values of participation for YOUR audience, your customers
 - Symphony goers in Calgary may have different benefits and value sets than those in Toronto

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Understanding audiences

The Values Study: Rediscovering the Meaning and Value of Arts Participation

Connecticut Commission on Culture and Tourism,
September 2004

<http://www.ctarts.org/Public.htm>

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Understanding audiences

What did the research find?

- clear impact of childhood arts experiences on adult participation and overall quality of life;
- interrelatedness of the arts ecosystem;
- people access one artform through another;
- people derive significant value from personal curating;
- “personal connections with artists can bridge a relevance gap and ignite latent arts interests and inspire participation”.

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Understanding audiences

“Why do people participate in arts activities?”

Values and benefits include

- cognitive,
- aesthetic,
- physical,
- emotional,
- socio-cultural,
- political,
- spiritual values,
- plus an overarching “identity formation” value set (self-confidence, self-esteem, pride and dignity)

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Understanding audiences

Strategies for adding value to the arts experience:

1. relevance at new levels
 - the specific work of art
 - specific artists
 - discipline
 - presenting institution
 - social relevance or
 - cultural relevance

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Understanding audiences

Strategies for adding value to the arts experience:

2. better understanding and marketing of the value that people derive from programs;
3. improved access to arts programs;
4. adding value to current offerings;
5. new programs and partnerships with other organizations that fill specific value needs.

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Research gaps

- Importance of community venues in Canada
- Canadian arts attendance data: more recent than 1998!

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Research gaps

- Arts education
 - How many children receive arts education?
 - Which artforms, at what age?
 - Which children receive, which don't?
 - At school or elsewhere (or both)?
 - How many arts teachers are there in primary and secondary schools?
 - ... school librarians?
 - ... arts consultants in Boards of Education?

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Research gaps

- Arts education
 - What role do (can) arts organizations play in arts education? For which children? How could this happen?
 - Are the benefits of arts education felt equally by different groups of children?
 - What are the benefits for different groups of adults?

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Arts attendance and cultural participation

- **Questions???**
 - Then: Artists in Canada (Q&A)
 - Research choices (time permitting)

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Artists in Canada

- 3 *Statistical Insights on the Arts* reports
 - *Statistical Profile of Artists in Canada*
 - *Artists in Canada's Provinces, Territories and Metropolitan Areas*
 - *Diversity in Canada's Arts Labour Force*
- Ontario Arts Council
 - *Statistical Profile of Artists in Ontario*

All based on the 2001 Census

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Artists in Canada – Key stats

- 131,000 artists in Canada
(who spent more time at their art than at any other occupation in May 2001)
- Average earnings of \$23,500
- "Earnings gap" of 26% compared with overall labour force

Source: *Statistical Profile of Artists in Canada* based on the 2001 Census

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Artists in Canada - Earnings

- Artists are in the lowest quarter of occupation groups in terms of average earnings
- Three-quarters of the 500-plus occupations tracked by Statistics Canada have average earnings higher than artists

Source: *Statistical Profile of Artists in Canada* based on the 2001 Census

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Artists in Canada - Earnings

- Occupations with similar earnings:
 - medical secretaries (\$23,300)
 - customer service clerks (\$23,400)
 - delivery drivers (\$23,500)

Source: *Statistical Profile of Artists in Canada* based on the 2001 Census

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Artists in Canada - Earnings

- In 5 of 9 arts occupations, **median** earnings are about \$10,000.
- A *typical*
 - artisan / craftsperson
 - dancer
 - musician / singer
 - other performer (circus, puppeteers)
 - painter / sculptor / other visual artistearns only about \$10,000.

Source: *Statistical Profile of Artists in Canada* based on the 2001 Census

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Artists in Canada - Earnings

Over 40% of artists hold a university degree yet economic returns to higher education are much lower for artists than for other workers:

- University-educated artists earn, on average, \$27,400, which is 56% of other university-educated workers (\$48,700).
- University-educated artists earn only slightly more than overall labour force workers with only a high school diploma (\$25,500).

Source: *Statistical Profile of Artists in Canada* based on the 2001 Census

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Equity issues in the arts

- Average earnings are especially low for:
 - Aboriginal artists (\$16,900, 28% less than all artists)
 - visible minority artists (\$20,800, 11% less than all artists)
 - women (\$19,400, 31% less than men)

Source: *Statistical Profile of Artists in Canada* based on the 2001 Census

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Equity issues in the arts

- Visible minorities:
 - 8.9% of artists
 - 12.5% of overall labour force
- Visible minorities under-represented in the arts
- In none of the nine arts occupations does the percentage of visible minorities reach 12.5%

Source: *Diversity in Canada's Arts Labour Force*

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Artists' work conditions

- About one-third of all professional dancers were both employed *and* self-employed in their dance work in 2003/04.
- On average, professional dancers worked with 2.8 dance engagers in 2003/04.

Source: *A Profile of Professional Dancers in Canada*
Dancer Transition Resource Centre – forthcoming 2005

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"Fertility rate" of female dancers 8 times less than other women

- One in six female dancers has a child
 - fertility rate is 0.18 children per woman
 - overall fertility rate in Canada is 1.5 children per woman
 - 8 times higher than the fertility rate of female dancers

Source: *A Profile of Professional Dancers in Canada*
Dancer Transition Resource Centre – forthcoming 2005

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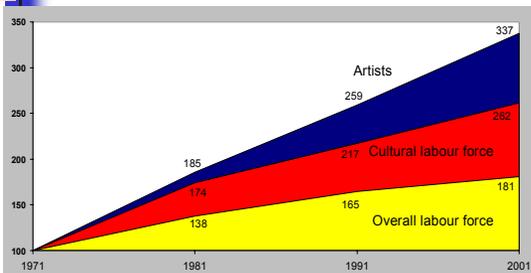
Growth in # of artists

- For every artist in Canada in 1971, there were 3.4 artists in 2001
- Broader cultural sector: 1 to 2.6
- Overall labour force: 1 to 1.8

Source: *Statistical Profile of Artists in Canada* based on the 2001 Census

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More than triple the # of artists between 1971 and 2001



Source: *Statistical Profile of Artists in Canada* based on the 2001 Census

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Growth in # of artists

- In the 1970s, the number of artists increased by 85%
- Overall labour force growth: 38%

- In the 1980s, the number of artists grew by 40%
- Double the 20% growth in the overall labour force.

Source: *Statistical Profile of Artists in Canada* based on the 2001 Census 49



Growth in # of artists

- Between 1991 and 2001:
- Growth in # of artists: 29%
 - Overall labour force: 10%
 - Growth in visible minority artists: 74%
 - Overall visible minority labour force: 55%

Government spending on culture has (obviously) not kept pace with these changes

- 1% increase 1992-2002 (after inflation)

Source: *Statistical Profile of Artists in Canada, Diversity in Canada's Arts Labour Force and Canadian Conference of the Arts* – forthcoming 50



Artists in Canada

- Key findings
 - high levels of education;
 - a high proportion of self-employment;
 - very low earnings; and
 - strong growth in the number of artists between 1971 and 2001; and
 - low earnings of university-educated, Aboriginal, female, visible minority artists.

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Artists in Canada

- Get as much \$ as possible to artists
- Advocate for government spending

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Artists in Canada

- Raise individuals' awareness: cultural participation and consumption
- Raise the profile of the arts: increase participants, donors, volunteers
- More, better arts education: increased cultural awareness

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Thank you for your time!

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