

Arts Attendance and Cultural Participation



Presented by the Saskatchewan Arts Alliance
June 27, 2005

Arts attendance and cultural participation



- Findings
- Implications
- Research gaps
- Q&A

www.HillStrategies.com



- Free resources available via email and internet in English and French
(revamped www.hillstrategies.com)
- *Statistical Insights on the Arts* (11 so far!)
Regards statistiques sur les arts
 - [Consumer Spending on Culture](#)
 - [Who Buys Books in Canada?](#)
 - [Artists in Canada](#)
 - 3 reports: National; Provincial / local; Visible minority, Aboriginal, immigrant artists
 - [Volunteers, donors, cultural spending](#)

www.HillStrategies.com



- *Arts Research Monitor* (4th season)

www.artsresearchmonitor.com

coming in the fall 2005

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



- Other arts research projects
 - *Government Spending on Culture in Canada*
(Canadian Conference of the Arts)
 - *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)

Consumer spending on cultural goods and services



- Canadian consumers spent \$22.8 billion on cultural goods and services in 2003
 - Greater than consumer spending on tobacco, alcohol and games of chance ... *combined* (\$20.8 billion)
 - 40% larger than the \$16.3 billion contributed to RRSPs in 2003
 - over three times larger than the \$7.4 billion spent on culture in Canada by all levels of government in 2002/03

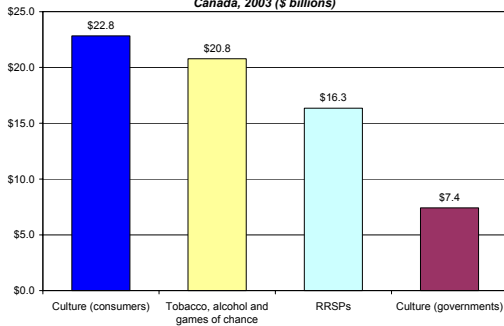
Source: *Consumer Spending on Culture in Canada, the Provinces and 15 Metropolitan Areas in 2003*, Hill Strategies Research, *Statistical Insights on the Arts* series

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Consumer spending on cultural goods and services



Figure 2: Consumer spending on culture compared to other items, Canada, 2003 (\$ billions)



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Consumer spending on cultural goods and services



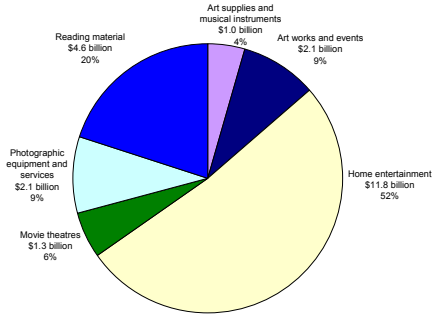
- Saskatchewan consumers spent \$660 million on cultural goods and services in 2003
 - 3.4% of total consumer spending in the province.
 - Over three times larger than the \$200 million spent on culture in Saskatchewan by all levels of government in 2002/03.
 - On a per capita basis, Saskatchewanians' cultural spending is the sixth highest among Canadian provinces at \$720 per resident.

Source: *Consumer Spending on Culture in Canada, the Provinces and 15 Metropolitan Areas in 2003*, Hill Strategies Research, *Statistical Insights on the Arts* series

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Consumer spending on cultural goods and services

Figure 1: Consumer spending on culture by category, Canada, 2003



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Culture is a growth market in Canada

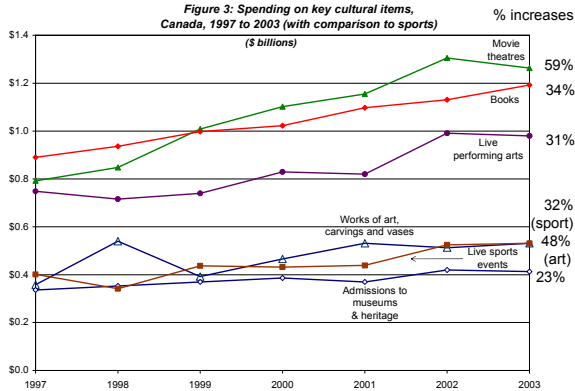
- Consumer spending on culture in Canada grew by 36% between 1997 and 2003
 - Greater than 14% inflation
 - Overall consumer spending grew by 33%
- After adjusting for inflation, consumer spending on culture grew by 19%
 - over three times the 6% growth in the Canadian population

Source: *Consumer Spending on Culture in Canada, the Provinces and 15 Metropolitan Areas in 2003*, Hill Strategies Research, *Statistical Insights on the Arts* series

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Culture is a growth market in Canada

Figure 3: Spending on key cultural items, Canada, 1997 to 2003 (with comparison to sports) (\$ billions)



Culture is a growth market in Saskatchewan



- Consumer spending on culture in Saskatchewan grew by 29% between 1997 and 2003
 - Greater than 14% Canadian inflation
 - Overall consumer spending grew by 21%

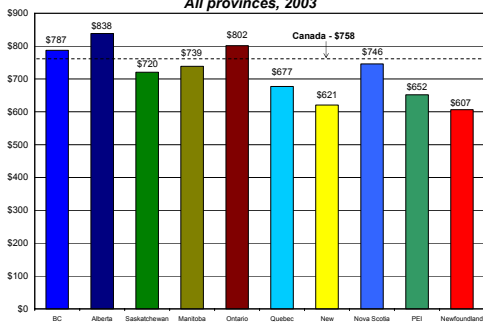
Source: *Consumer Spending on Culture in Canada, the Provinces and 15 Metropolitan Areas in 2003*, Hill Strategies Research, *Statistical Insights on the Arts* series

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Per capita consumer spending on culture by province



Figure 4: Consumer spending on culture per capita
All provinces, 2003



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Consumer spending on cultural goods and services by province

Table 1: Per capita cultural spending and total spending in Canada and the provinces, 2003z

Jurisdiction	Cultural goods and services	Rank	All goods and services	Culture as % of all
Canada	\$758		\$24,000	3.2%
BC	\$787	3	\$23,800	3.3%
Alberta	\$838	1	\$25,100	3.3%
Saskatchewan	\$720	6	\$21,500	3.4%
Manitoba	\$739	5	\$21,800	3.4%
Ontario	\$802	2	\$25,600	3.1%
Quebec	\$677	7	\$23,000	2.9%
New Brunswick	\$621	9	\$19,300	3.2%
Nova Scotia	\$746	4	\$19,300	3.4%
PEI	\$652	8	\$19,000	3.4%
Newfoundland & Labrador	\$607	10	\$18,500	3.3%

Cultural supply and demand by Census Metropolitan Area

Table 2: Rankings of 15 metropolitan areas on selected cultural indicators

Metropolitan area	Bohemian Index	Cultural spending per capita	Spending on art works and events per capita
Victoria	2	2	5
Vancouver	1	7	3
Edmonton	11	4	6
Calgary	5	3	1
Saskatoon	10	9	12
Regina	13	5	8
Winnipeg	8	8	7
Toronto	3	10	4
Ottawa - Hull	6	1	2
Montreal	4	12	11
Quebec City	12	13	13
Saint John	14	15	15
Halifax	7	6	9
St. John's	9	14	14
Charlottetown	n/a	11	10

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St. John's	9	14	14
Charlottetown	n/a	11	10

Predicting performing arts attendance



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) . . .

Predicting performing arts attendance



Who attended a theatre performance in 1998?

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

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Predicting performing arts attendance



- 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*)²⁰

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Arts attendance, volunteers and sports participants



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



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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Predicting literature reading in the USA



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

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Predicting literature reading in the USA



- 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 in the USA



- 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 in the USA



- 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 in the USA



- 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 in the USA

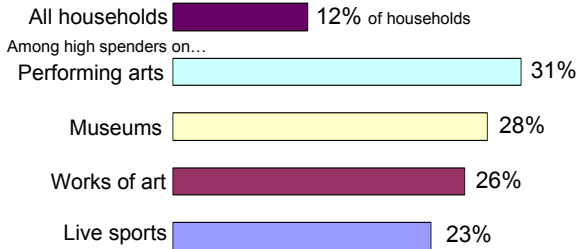


- Attend **both** an art museum and a performing arts event: nearly **6 times as likely** to read literature as those who participated in neither.
- Attend **either** an art museum **or** a performing arts event are **over 2 times as likely** to read literature as those who did neither.
- Those with 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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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
 - Theatre goers in Regina 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, Sept. 2004
<http://www.ctarts.org/Public.htm>

- 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".

See *Arts Research Monitor Vol. 4 No. 1* for more info.

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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???



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