

Factors in Canadians' Arts Attendance

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Presentation + discussion
February 28, 2013



Topics for discussion


1. Basic attendance stats
2. Demographic factors and cultural crossovers
 - Audience development / Marketing implications
 - Discussion
3. Motivations underlying arts attendance
 - Discussion
4. Practical factors in attendance
5. Arts engagement
 - Discussion

Statistical Insights on the Arts

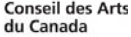
- 39 reports in the series (so far)
- *The Arts and Individual Well-Being in Canada*
- *Factors in Canadians' Arts Attendance in 2010*
- *Volunteers and donors to arts and culture organizations* (update coming soon)
- *Patterns in performing arts spending*
- *Consumer spending on culture*
- *A statistical profile of artists in Canada*

All available at www.HillStrategies.com


Funding for Statistical Insights on the Arts series and select presentations (including today)




Canada Council
for the Arts




Conseil des Arts
du Canada



Canadian
Heritage



Patrimoine
canadien



ONTARIO ARTS COUNCIL
CONSEIL DES ARTS DE L'ONTARIO

Arts Research Monitor

- Free report (10 times per year)
- Summaries and links to research evidence
- Free, categorized, searchable information at HillStrategies.com
 - *ArtsResearchMonitor.com has been re-integrated into HillStrategies.com*



The screenshot shows the Hill Strategies website with a navigation menu (Home, Resources, About, Media, Contact) and a 'Resources on the arts' section. A 'Sign up' button is visible for receiving free arts research information. The page lists several reports with their dates: 'Statistical Insights on the Arts' (28 September 2012), 'Factors in Canadians' Arts Attendance in 2010' (21 March 2012), 'Provincial Profiles of Arts, Culture and Heritage Activities in 2010' (16 February 2012), and 'Canadian Arts, Culture and Heritage Activities in 2010' (18 January 2012).

Arts Research Monitor

- Evidence basis for the arts ...
 - Arts advocacy
 - Arts attendance & participation
 - Arts education
 - Arts funding & finances
 - Copyright and the arts
 - Creative class, cities, people, neighbourhoods
 - Digital technologies & the arts
 - Diversity & immigration
 - Facilities
 - Human resources
 - Miscellaneous resources
 - Nonprofit sector information
 - Organizational planning, management, governance & marketing
 - Partnerships
 - Provincial and local information
 - State of the artist: earnings, growth, etc.
 - Volunteers & donors
 - Women in the arts

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Arts Research Monitor

- Evidence about arts disciplines
 - Performing arts
 - Media arts
 - Reading, writing, publishing and literacy
 - Visual arts
- Impacts of the arts
 - Economic impacts
 - Social impacts
 - Arts and health

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Presentations

Today's presentation

- Factors in Canadians' Arts Attendance
www.hillstrategies.com/content/factors-canadians-arts-attendance
- *Also of interest*
- Audiences, markets and motivations in the performing arts (Performing Arts Alliance)
www.hillstrategies.com/content/audiences-markets-and-motivations-performing-arts-0

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So, what do you want to do this weekend?

Basic stats on arts attendance

Arts attendance in Canada: Statistical Insights on the Arts

- Data from Statistics Canada’s General Social Surveys of 2010 (historical comparisons to 1992)
- in-depth telephone surveys of about 7,500 Canadians
- 15 years of age or older
- *The Arts and Individual Well-being* (January 2013)
- *Factors in Canadians’ Arts Attendance in 2010* (September 2012)
- *Provincial Profiles of Arts, Culture and Heritage Activities in 2010* (March 2012)
- *Canadians’ Arts, Culture and Heritage Activities in 2010* (February 2012)

Arts attendance stats

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- Repeat attendees are counted only once.
- The data includes attendance of Canadian residents while travelling out of province or out of the country and excludes attendance by residents of other jurisdictions while travelling in Canada.
- So: the data on Canadian performing arts attendees represents the number of Canadian residents who attended at least one performance (anywhere) in 2010
 - Not total attendance at Canadian performing arts organizations.

Culture for all?

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In 2010, all Canadian residents 15 or older participated in least one arts, culture or heritage activity (99.7%!).

Including:

- Visiting art galleries or other museums
- Attending live performances
- Visiting historic sites and other heritage organizations
- Reading newspapers, magazines or books
- Watching movies or videos
- Listening to recorded music

Canadians' Arts, Culture and Heritage Activities in 2010 (Hill Strategies Research Inc., February 2012, analysis of data from Statistics Canada's General Social Survey, 2010)

Cultural participation rates

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More specifically, in 2010:

- 47.8% of Canadians 15 or older visited an art gallery or other museum.
- 72.4% attended a performing arts event or a cultural festival.
- 73.8% visited a heritage venue (including historic sites, zoos, aquariums, botanical gardens, planetariums, observatories, conservation areas and nature parks).
- 97.5% read a newspaper, magazine or book.
- 87.2% watched a movie or a video.
- 86.7% listened to downloaded music or music on CDs.

American research: Decreasing performing arts attendance

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% of US population participating: 1982 to 2008

Seven "benchmark activities" (below items, excluding "other dance"): 39.0% in 1982 and 34.6% in 2008

- Classical music: 13.0% to 9.3%
- Opera: 3.0% to 2.1%
- Jazz: 9.6% to 7.8%
- Musical plays: 18.6% to 16.7%
- Non-musical plays: 11.9% to 9.4%
- Ballet: 4.2% to 2.9%
- Other dance (asked first in 1992): 7.1% in 1992 to 5.2% in 2008
- Art museums/ galleries stable: 22.1% in 1982 and 22.7% in 2008

2008 Survey of Public Participation in the Arts, National Endowment for the Arts, 2009
Sample question (classical): "With the exception of elementary or high school performances, did you go to a live classical music performance such as symphony, chamber, or choral music during the last 12 months?"

Arts attendance trends

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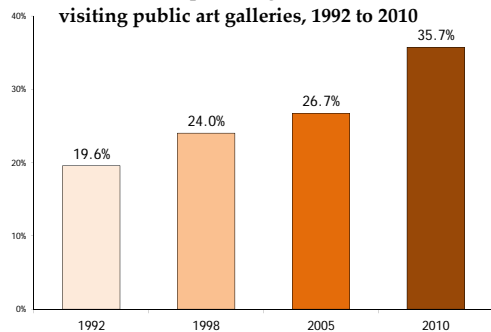
Q: What about Canadians?

A: Many increases, especially recently and especially infrequent attendees

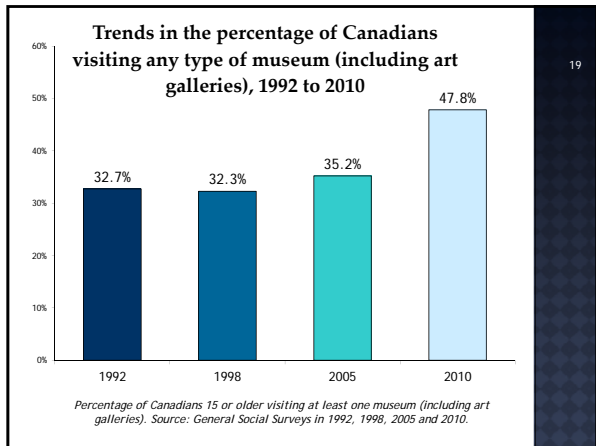
- Art galleries, museums, festivals, historic sites, book reading

Trends in the percentage of Canadians visiting public art galleries, 1992 to 2010

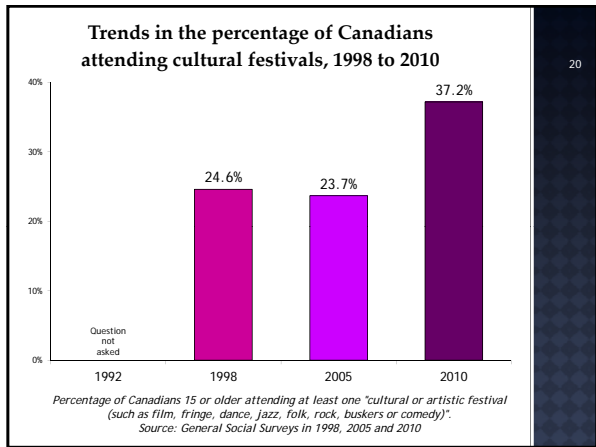
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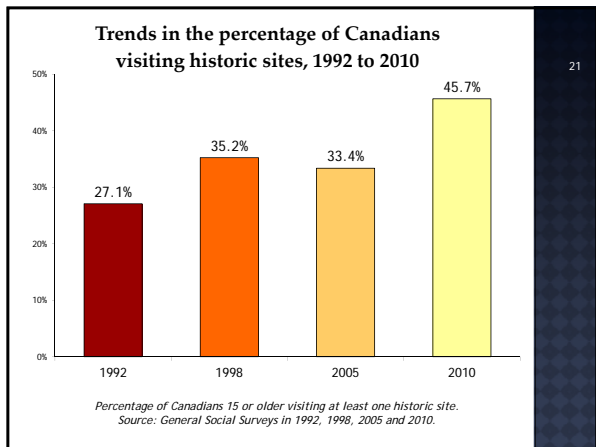
Percentage of Canadians 15 or older visiting at least one "public art gallery or art museum (including attendance at special art exhibits)".
Source: General Social Surveys in 1992, 1998, 2005 and 2010.



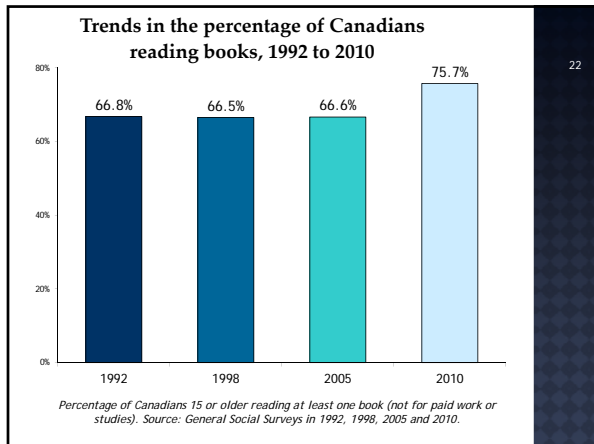
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Three key performing arts questions: data not comparable to prior surveys

- 1992, 1998 and 2005: attendance at “a concert or performance by professional artists of music, dance, theatre, or opera, excluding cultural festivals”.
 - If yes: asked theatre, pop music, and classical music attendance questions
- 2010: no introductory question
 - Respondents might have included amateur performances and festivals

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Arts and Individual Well-Being

- Most recent Statistical Insights on the Arts report
- Examined 8 social indicators
 1. Self-reported health
 2. Self-reported mental health
 3. Volunteer rates
 4. (Not) feeling trapped in a daily routine
 5. Stress levels
 6. Knowledge of neighbours
 7. Doing a favour for a neighbour
 8. Self-reported life satisfaction

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Arts and well-being

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- 18 arts, culture and heritage activities
- Cross-tabulated with 8 social indicators
- 144 possible culture-social connections

- Cultural participants have significantly better results than non-participants on 101 of the 144 social connections
 - 70%

Arts and well-being

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- Detailed statistical models of six cultural activities and three social indicators
 - Theatre attendance
 - Pop music attendance
 - Attendance at cultural festivals
 - Reading books
 - Associated with all three social indicators: Better health, volunteering, and strong satisfaction with life.
 - Art gallery visits
 - better health and higher volunteer rates
 - Classical music attendance
 - higher volunteer rates and strong satisfaction with life

Demographic factors and cultural crossovers

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Predicting art gallery visits

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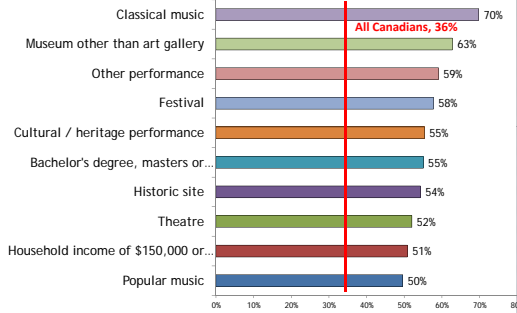
- ◉ "Education is the strongest demographic factor in art gallery attendance."
- ◉ Other demographic factors:
 - High household income
 - Urban residence
 - Non-Aboriginal
 - Quebec residents (all languages)

Factors in Canadians' Arts Attendance in 2010 (Hill Strategies Research Inc., September 2012, analysis of data from Statistics Canada's General Social Survey, 2010)

Highest art gallery attendance rates, Canada, 2010

(Cultural crossovers and demographic factors)

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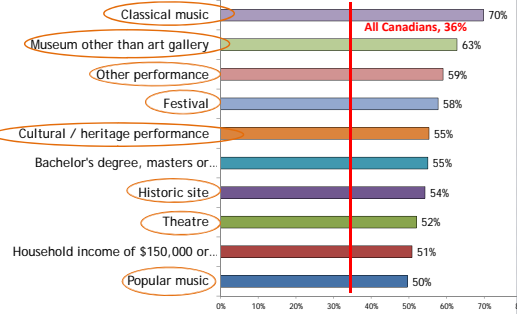


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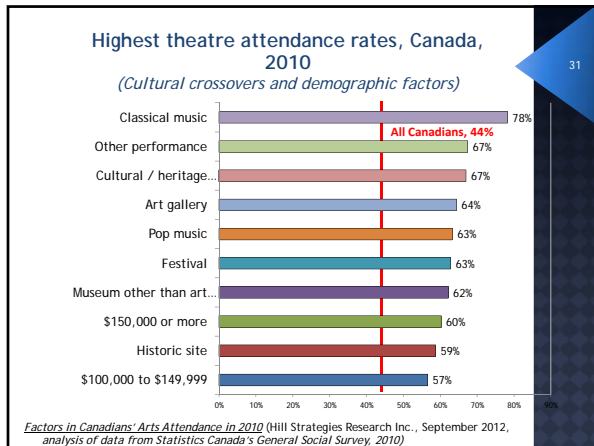
Highest art gallery attendance rates, Canada, 2010

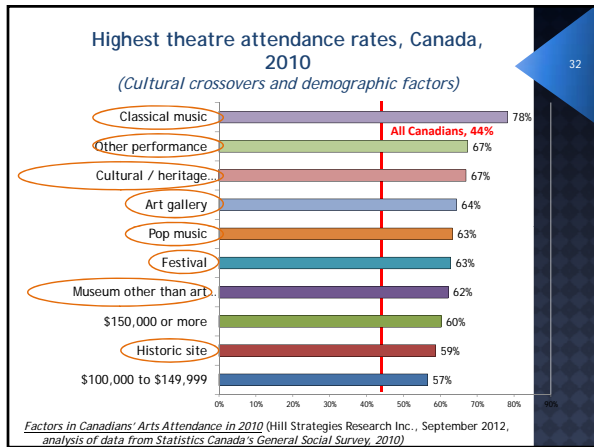
(Cultural crossovers and demographic factors)

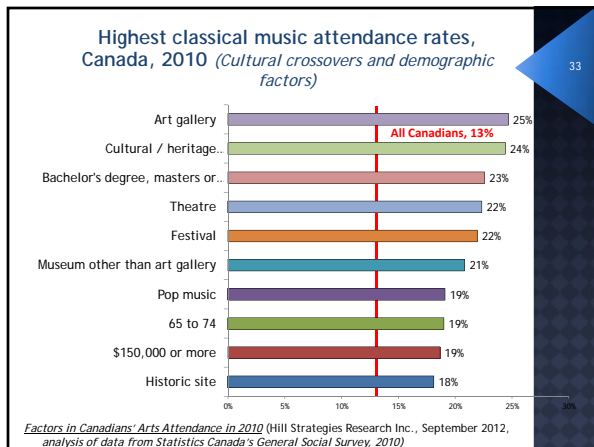
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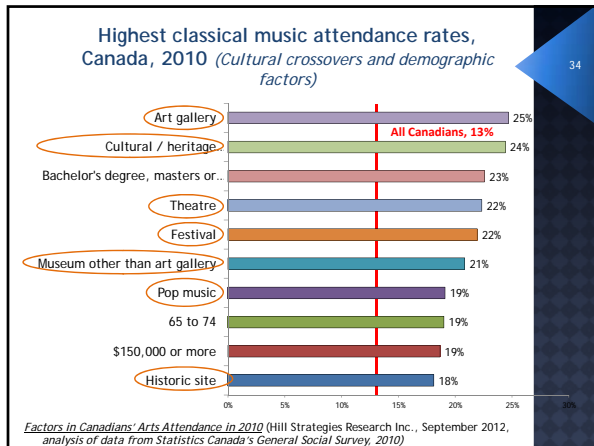


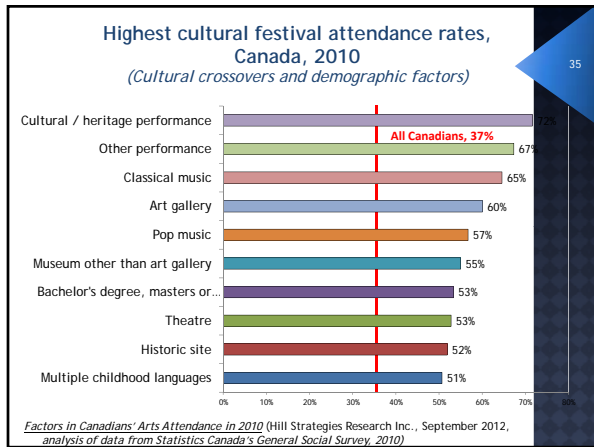
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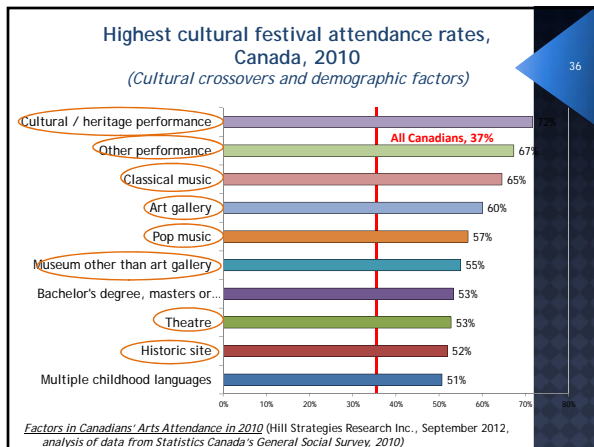


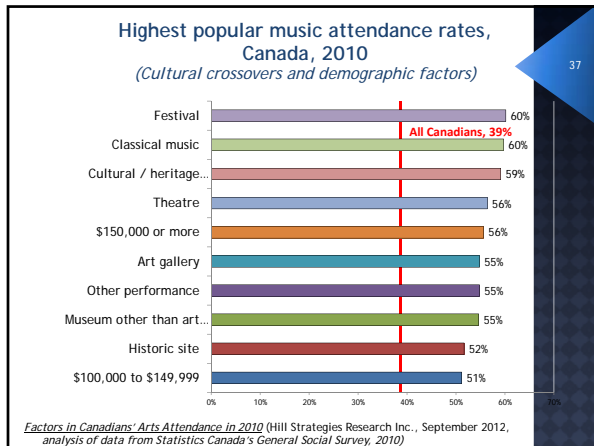


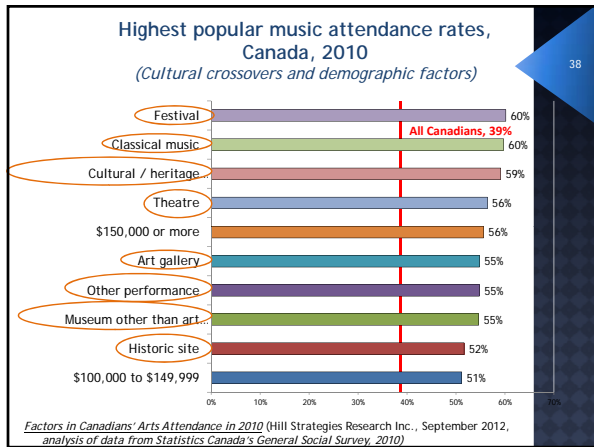












Importance of cultural exposure

- Canadians with less than a secondary school diploma
 - 20% likelihood of visiting an art gallery in 2010
- Same level of education BUT knowing that they also attended a classical concert in 2010
 - 44% likelihood of visiting an art gallery in 2010

Factors in Canadians' Arts Attendance in 2010 (Hill Strategies Research Inc., September 2012, analysis of data from Statistics Canada's General Social Survey, 2010)

Importance of cultural exposure

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- Cultural experiences and exposure appear to be more important factors in arts attendance than demographic factors.
 - Statistical models: Many cultural activities are significant predictors of attendance at other types of activities
 - even keeping other factors constant, such as education, income, age, etc.

Factors in Canadians' Arts Attendance in 2010 (Hill Strategies Research Inc., September 2012, analysis of data from Statistics Canada's General Social Survey, 2010)

Predicting arts attendance

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- Statistical models of five arts activities
 - Theatre attendance
 - Classical music attendance
 - Pop music attendance
 - Cultural festival attendance
 - Art gallery attendance
- 12 of 17 other cultural activities are statistically significant predictors of art gallery attendance (keeping other factors constant)

Factors in Canadians' Arts Attendance in 2010 (Hill Strategies Research Inc., September 2012, analysis of data from Statistics Canada's General Social Survey, 2010)

Predicting art gallery visits

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- Statistical model retained 12 of 17 other cultural activities as statistically significant predictors of art gallery attendance (keeping other factors constant).

Strongest predictors

- Another type of museum (i.e., other than art galleries)
 - Attendees are three times (2.99) more likely to visit a gallery than non-attendees
- Classical music
 - Attendees are 2.18 times more likely to visit a gallery than non-attendees
- Cultural festivals
 - Attendees are 2.01 times more likely to visit a gallery than non-attendees
- Historic sites
 - Attendees are 1.85 times more likely to visit a gallery than non-attendees

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Possible implications

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Arts audience development

- Findings may hint at the importance of arts education
 - Arts education was not measured in the StatsCan survey.
- There is an arts-interested public that transcends demographic analysis.
- Those who get the arts go to a range of things
 - Strong “crossover attendance”
- Those who don’t “get it” don’t go
- Is there an “arts bug”?

Factors in Canadians' Arts Attendance in 2010 (Hill Strategies Research Inc., September 2012, analysis of data from Statistics Canada's General Social Survey, 2010)

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Pinpointing outreach efforts

- Additional outreach needed where specific demographic groups have a negative correlation with attendance at arts activities.

Factors in Canadians' Arts Attendance in 2010 (Hill Strategies Research Inc., September 2012, analysis of data from Statistics Canada's General Social Survey, 2010)

Arts marketing

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- Marketing efforts targeted toward attendees at activities that are strongly correlated with attendance at another type of arts activity.
 - E.g., consider customizing performing arts marketing messages for museum and art gallery visitors
- Ensure that performance information is available at museums, galleries, festivals, historic sites, and other cultural sites
- Ensure that brochures and other materials are available in libraries, bookstores and at reading series

Arts marketing / collaborations

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- Efforts to draw new arts attendees could pay off in higher participation in a range of cultural activities
 - Enlarge the pie and many organizations can reap the rewards
- Collaboration
 - Collaborate with other groups that have similar goals and clientele
 - Consider joint marketing approaches
- Work to spread the “arts bug” to more people

How to spread the bug?

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- Talk to audience members
- Develop a better understanding of motivations and values for organizations’ specific audiences

How to spread the bug?

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- Arts education
 - No questions available from Statistics Canada's 2010 General Social Survey
 - Clear impact of childhood arts experiences on adult participation
 - NEA: "arts education has a more powerful effect on arts attendance than any other measurable factor"
 - Clear impact of childhood arts experiences on overall quality of life

Discussion

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- ❖ Is there an "arts bug"?
- ❖ Ideas for audience development?

Audience motivations

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Performing arts attendance motivations

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Rank	Motivation	Source
2	Stimulated (emotion, spirit, intellect)	CAPACOA
2	Variety	PCH-fest/series
2	Engage intellect	CT
2	Emotional rewards	MM-USA
2	Learning	LNS

Performing arts attendance motivations: Summary of 5 studies

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Rank	Motivation	Source
3	Learning	CAPACOA
3	Socialize	PCH-fest/series
3	Learning (discover new)	CT
3	Quality	MM-USA
3	Quality	LNS
4	Different cultures	CAPACOA
4	My culture	LNS
5	Socialize	CAPACOA
5	Socialize	LNS

Motivations: common threads

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Motivation	Rank	Source
Entertainment	1	CAPACOA
Entertainment	1	LNS
Enjoyment	1	PCH-fest/series

Motivations: common threads

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Motivation	Rank	Source
Entertainment		
Learning	2	LNS
Learning	3	CAPACOA
Learning (engage intellect)	2	CT
Learning (discover new)	3	CT

Motivations: common threads

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Motivation	Rank	Source
Entertainment		
Learning		
Socialize	1	MM-USA
Socialize	3	PCH-fest/series
Socialize	5	CAPACOA
Socialize	5	LNS

Motivations: common threads

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Motivation	Rank	Source
Entertainment		
Learning		
Socialize		
Emotional rewards	2	MM-USA
Stimulated (emotion, spirit, intellect)	2	CAPACOA
Quality	3	MM-USA
Quality	3	LNS

Summary of motivations

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- ◉ Entertaining, enjoyable experiences
- ◉ Learning
- ◉ Socializing
- ◉ Stimulating, emotionally rewarding experiences
- ◉ High-quality experiences

Motivations: A research caution

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- ◉ Motivations are diverse
- ◉ There are some common threads in the research
- ◉ But also a lot of variety in...
 - Location of respondents
 - Survey goals and disciplines
 - Survey questionnaires
 - Response options

Motivations: Conclusions

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- ◉ Attendee motivations may vary for different types of organizations, in different locations, and at different times
- ◉ In my opinion, no general conclusions can be drawn at this point.
 - Examine closely the findings closest to your location and discipline
 - Talk to your own attendees.

Key things to know about attendees

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- What are your attendees' motivations?
- What benefits are most important for your attendees?
- Do most people have the experiences they hoped to have?
- Work to add value to their arts experiences.

Discussion

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Other (practical) factors in attendance

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Motivation - Ability - Opportunity

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- People participate if motivations, ability and opportunity come together.

- Motivation** = the desire to participate
- Ability** = skills or proficiency to participate
 - Finances, Time, Physical capacity, Mental resources
- Opportunity** = absence of environmental barriers to action
 - Price, Place, Product, and Promotion

Motivation, Ability and Opportunity to Participate: A Reconceptualization of the RAND Model of Audience Development, by J. Wiggins, in International Journal of Arts Management, Vol. 7, 2004.

MAO-Model of Audience Development: Some Theoretical Elaborations and Practical Consequences, presentation at International Conference on Arts and Cultural Management, 2004

American research into factors in cultural attendance

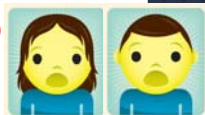
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- Culture Track 2011*, LaPlaca Cohen
- “Very influential” factors in the decision to attend a cultural event:
 - Cost (46% of respondents)
 - Interest of spouse or partner (41%)
 - An invitation from friends or family (35%)
 - Discount tickets (28%)
 - Friends’ recommendations (24%)

American research into factors in cultural attendance

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- Culture Track 2011*, LaPlaca Cohen
- 3 OF THESE ARE SOCIAL OR PERSONAL FACTORS
- “Very influential” factors in the decision to attend a cultural event:
 - Cost (46% of respondents)
 - INTEREST OF SPOUSE OR PARTNER (41%)
 - AN INVITATION FROM FRIENDS OR FAMILY (35%)
 - Discount tickets (28%)
 - FRIENDS’ RECOMMENDATIONS (24%)



American research into audience barriers

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- Barriers to attendance:
 - Cost (67% of respondents indicated that it "costs too much")
 - Unappealing programs or events (50%)
 - Belief that it is "too much of a hassle to get there" (39%)
- Conclusion: "the value proposition remains the most influential driver as well as the biggest barrier" to participation

Source: *Culture Track 2011*, LaPlaca Cohen

Practical barriers

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- Canada Council
- Cost
 - Availability
 - Other accessibility issues
 - "Programming and marketing which is not inclusive of the full diversity of Canadian society"
 - Psychological barriers

Public Engagement in the Arts: Discussion paper, Canada Council for the Arts, 2012

Audience engagement

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What is “engagement”?

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- ◉ Canada Council: “no universally accepted or generally followed definition of public engagement in the arts”
 - Often not explicitly defined in research studies
- ◉ Common themes
 - value of personal participation
 - holistic impacts on people’s lives
 - encouragement of dialogue between the individual and a work of art
 - role of art in building social capital

Public Engagement in the Arts: Discussion paper, Canada Council for the Arts, 2012

What is “engagement”?

74

- ◉ Canada Council report:
 - “actively engaging more people in the artistic life of society notably through attendance, observation, curation, active participation, co-creation, learning, cultural mediation and creative self-expression”
 - “Shift from a focus on the art and the artist to the public as the central driver of cultural and arts policy and actions”

Public Engagement in the Arts: Discussion paper, Canada Council for the Arts, 2012

From Attendance to Engagement

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- ◉ Engagement = broader concept
- ◉ Live attendance
 - +
- ◉ Personal practices (e.g., creating art works, taking arts lessons, writing blogs, dancing, singing, playing an instrument)
 - +
- ◉ Media-based consumption: listening or watching on the internet, reading blogs and watching TV competitions
 - +
- ◉ Enrichment of the arts experience
 - Introductions from the stage
 - Audiences participating, reacting and interacting during performances
 - Post-show reflection

WolfBrown model of arts participation

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Five Modes of Arts Participation, Based on Level of Creative Control

- **Inventive Arts Participation** engages the mind, body and spirit in an act of artistic creation that is unique and idiosyncratic, regardless of skill level.
- **Interpretive Arts Participation** is a creative act of self-expression that brings give and adds value to pre-existing works of art, either individually or collaboratively.
- **Curatorial Arts Participation** is the creative act of purposefully selecting, organizing and collecting art to the satisfaction of one's own artistic sensibility.
- **Observational Arts Participation** encompasses arts experiences that you select or consent to, motivated by some expectation of value.
- **Ambient Arts Participation** involves experiencing art, consciously or unconsciously, that you did not select.

Source: *Ontario Arts Engagement Study*, prepared by WolfBrown for the Ontario Arts Council, 2011

Ontario Arts Engagement Study

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Results from a 2011 Province-wide Study of the Arts Engagement Patterns of Ontario Adults, Ontario Arts Council (WolfBrown)

- Virtually all Ontarians participate in the arts
 - E.g., 98% of Ontarians engage at least once a year in any of the 11 visual arts, crafts and film activities included in the survey
 - Visitors place significant importance on visiting art galleries (even though not attended as frequently as some other activities)
- Personal arts practice: fewer differences than attendance by education, income, urban/rural

Ontario Arts Engagement Study

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- Personal arts practice is correlated with visiting art galleries
 - Strong relationship between “doing” and “going”
 - Examples:
 - 6.2 art gallery visits per person for those who “take photographs with artistic intentions” (vs. 3.6 visits for those who do not)
 - 7.2 visits for those who “paint, draw or make other original art” (vs. 3.8 for those who do not)
 - Also true for making crafts and taking art lessons

Ontario Arts Engagement Study

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- Health of the arts “depends on a multiplicity of offerings” related to both personal practice and attendance
- Important role for the arts in social bridging and bonding

Creative Trust's Audience Engagement Survey

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(Conducted by WolfBrown and Hill Strategies, 2010)

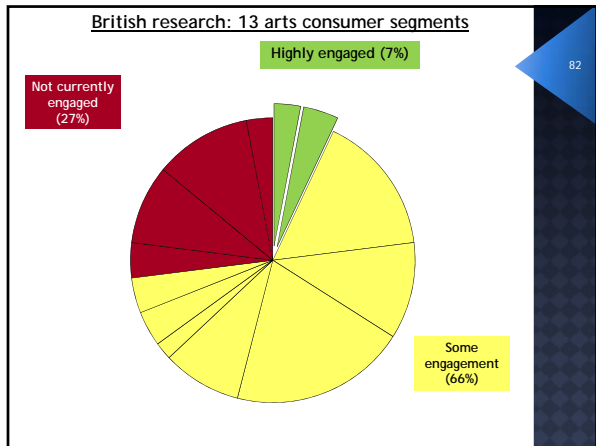
- Toronto-area performing arts attendees (20 small + mid-sized organizations)
- Engagement before, during and after performances in 4 disciplines: dance, music, opera, theatre
- Socializing: “friends are the most common attendance companions in all four disciplines, followed by spouses or partners”
- However, “a substantial minority of audiences in all disciplines attend alone.”

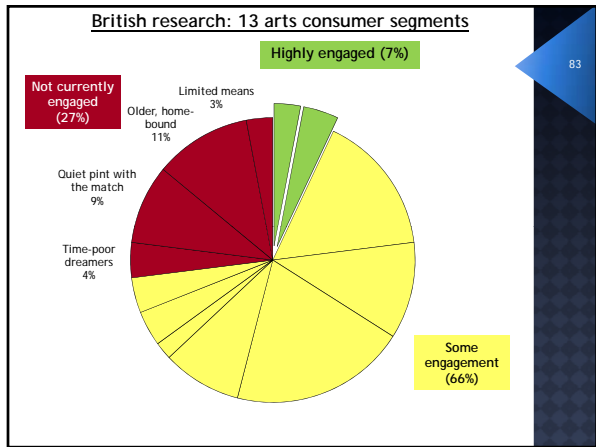
Audience segmentation

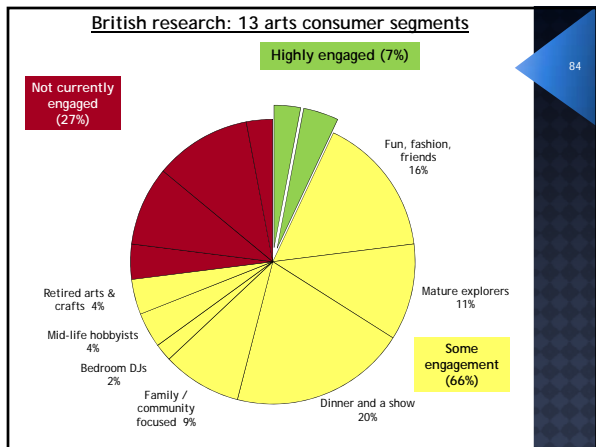
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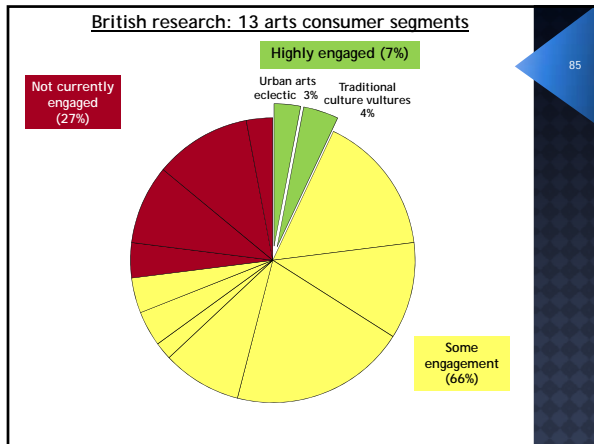
- English research: 13 arts consumer segments
 - patterns of arts consumption
 - attitudes toward the arts
 - leisure pursuits
 - socio-demographic factors
 - media consumption
 - lifestyle elements

Arts audiences: Insight 2011, Arts Council England, 2011.
<http://www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/arts-audiences-insight-2011>









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13 arts consumer segments (UK)

- 2 highly-engaged groups
- "Urban arts eclectic" (3%)
 - younger, active, highly educated, affluent, and "more actively engaged in the arts than any other segment"
 - "highly motivated, have a keen interest in other cultures, and a thirst for new experiences."
 - Arts are "fun, exciting and encouraging them to think differently about life"
 - Challenge: competing for their time
 - Position arts as cutting edge, opportunity for self-expression, and a way to explore other cultures or to socialise"

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13 arts consumer segments (UK)

- 2 highly-engaged groups
- "Traditional culture vultures" (4% of the English population)
 - Older, highly-educated, affluent people (especially women)
 - Arts and culture as part of their identity
 - "form the core loyal audience base for several of the more traditional arts"
 - Position the arts as high-quality, creative, and intellectually stimulating

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