CULTURE TRACK

CANADA

Business / Arts

LaPlaca Cohen

NANOS

Culture Track is a cultural innovation engine, dedicated to addressing the most pressing challenges facing the worlds of culture and creativity through research, education, dialogue, and action.

We believe that studying and tracking the shifting patterns of audience behaviour is critical to shaping the future of culture.

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About
Culture Track: Canada

What is *Culture Track: Canada?*

Culture Track: Canada is a study of the attitudes and behaviours of Canadian cultural consumers. It is the first Culture Track study fielded in Canada, building on the long-running research initiative of LaPlaca Cohen, a New York-based strategy, marketing, and design firm for the creative and cultural worlds. *Culture Track: Canada* sets an important baseline for both understanding the unique proclivities of Canada's cultural audiences, and for future research efforts that can build upon insights first uncovered here.

The development of *Culture Track: Canada* was spearheaded by Business / Arts, Canada's only national charitable association of business members who support the arts, in collaboration with LaPlaca Cohen. Nanos Research fielded the study and advised on the design of the questionnaire. The study was generously supported by a variety of funders across Canada, a full list of which can be found on pg. 4.

To ensure *Culture Track: Canada* reflects its distinctly Canadian context, the questionnaire was edited in key areas with input from nearly 40 stakeholders representing Canadian cultural organizations, business, and government. A full list of stakeholders consulted can be found on pg. 5.

How was *Culture Track: Canada* fielded?

The *Culture Track: Canada* survey was fielded from December 21, 2017 to January 11, 2018 with a total of 6,444 respondents nationwide in an online questionnaire administered in both French and English. All respondents were 18 years or older, and were screened into the survey based on two criteria: their participation in at least one cultural activity in the past twelve months (see a list of activities surveyed at left); and their definition of that activity as a "cultural" activity.

The sample size for each province was at least 400. In addition, oversamples were completed in Alberta, British Columbia, Ontario, and Québec (resulting in sample sizes of over 1,000 for each of those provinces) to ensure an even more robust pool of audience data from which to draw conclusions. The samples from all provinces were then weighted to ensure accurate proportionality based on actual population counts in each province.

Cultural activities:

1. Art or design museum/gallery
2. Children's museum
3. Art gallery/fair
4. Botanical garden
5. Zoo or aquarium
6. Science, innovation, or technology museum
7. Natural history museum
8. Public park
9. Architectural tour or exhibit
10. Public/street art
11. Film festival
12. Music festival
13. Performing arts festival
14. Community festival/street fair
15. Craft or design fair
16. Books/literature
17. Food and drink experience
18. Non-musical play
19. Musical
20. Variety or comedy show
21. Popular music
22. Classical music
23. Jazz music
24. Opera
25. World music
26. Contemporary dance
27. Ballet
28. Cultural dance
29. Historic attraction/museum
30. Television program
31. Movies/film
32. Library
33. Cultural centre
34. A festival that is celebrated or organized by an ethnic group

What's included in this document?

The graphs and insights in this top-line report illustrate the responses of the entire data set and, in specific places, of individual provinces, generations, racialized groups, and other demographic cohorts. More granular statistics on specific sub-groups can be found in the raw data tables online and available for download at www.businessandarts.org/culturetrack. Ideally, future deep-dive studies could augment the insights uncovered by *Culture Track: Canada* to provide even further understanding of sub-groups.

This report also includes comparisons to U.S. audience data from LaPlaca Cohen's *Culture Track '17* in places where significant similarities and differences exist between U.S. and Canadian cultural consumption. *Culture Track '17* can be downloaded in full at www.culturetrack.com.

Note: When we break out the data by generations, age ranges are defined as Millennials (20-35), Gen X (36-52), Baby Boomers, (53-71), and Pre-Wars (72+). For the purposes of this top-line report, "people of colour" are defined as those who self-identity as neither white/Caucasian nor Indigenous. More information on those within specific demographic cohorts can be found in the full data set, available for download at www.businessandarts.org/culturetrack.

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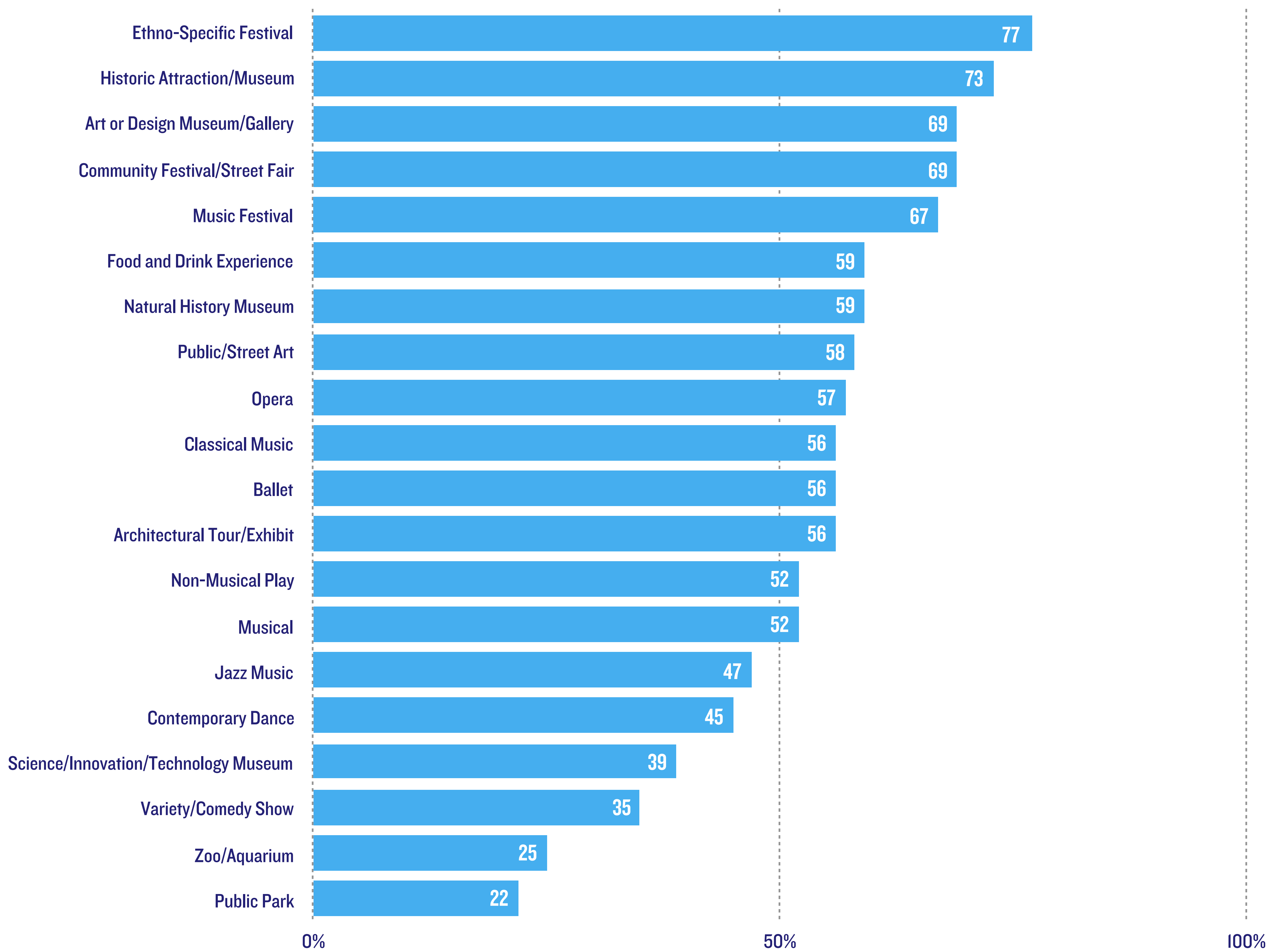
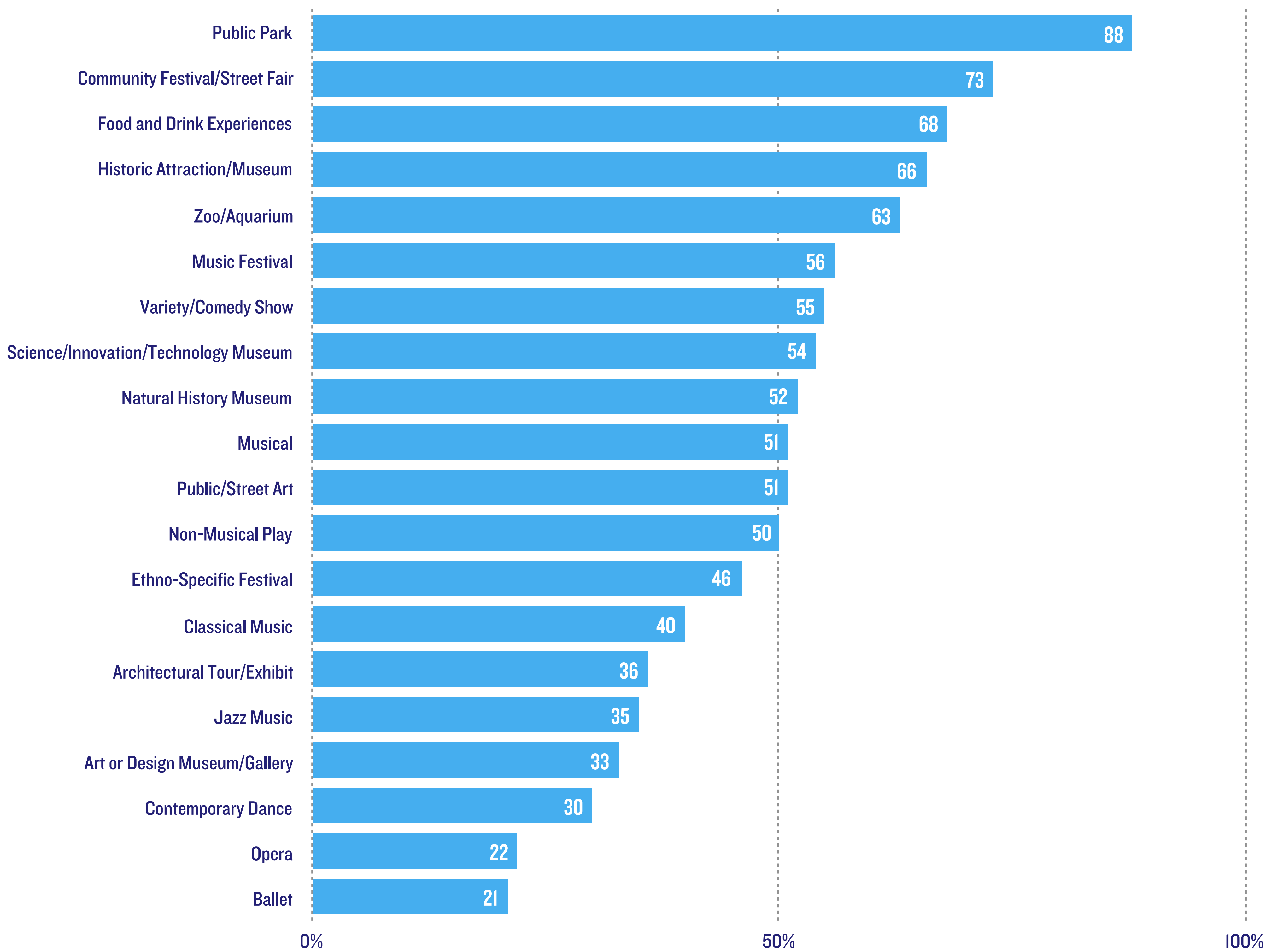
The Canadian Cultural Landscape

Definition of Culture



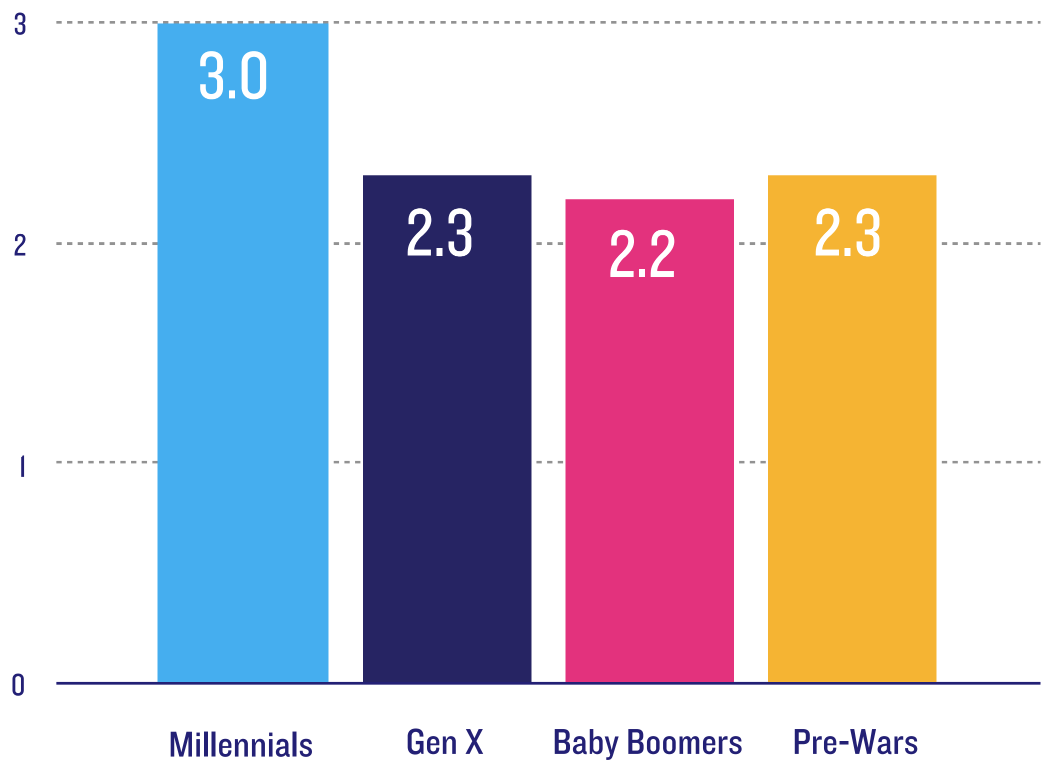
Canadians are cultural omnivores. Rather than define "culture" in narrow terms, audiences view it as inclusive of a broad and diverse set of activities, whether that be a visual art museum, a dining experience, a music festival, or a local street fair.

Participation At Least Once a Year



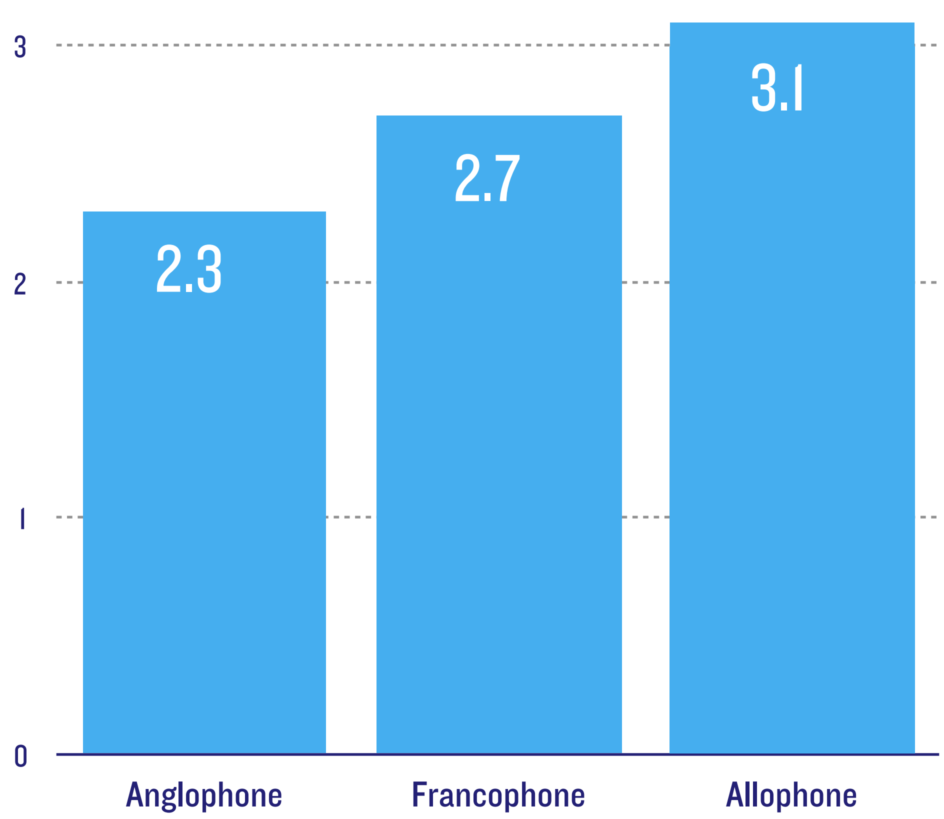
Although audiences define "culture" expansively, what do they actually participate in the most? By and large, activities such as going to parks, community festivals, or food and drink experiences are more popular than the "benchmark arts" (those activities that have historically been thought of as "traditional" culture, such as art museums, ballets, or operas).

Frequency of Participation Per Month



Of all generations, Millennials are the most culturally active, taking part in an average of three cultural activities per month. And they're not just going to music festivals or street fairs—for almost every activity surveyed, those under 35 are more likely to participate compared to older generations.

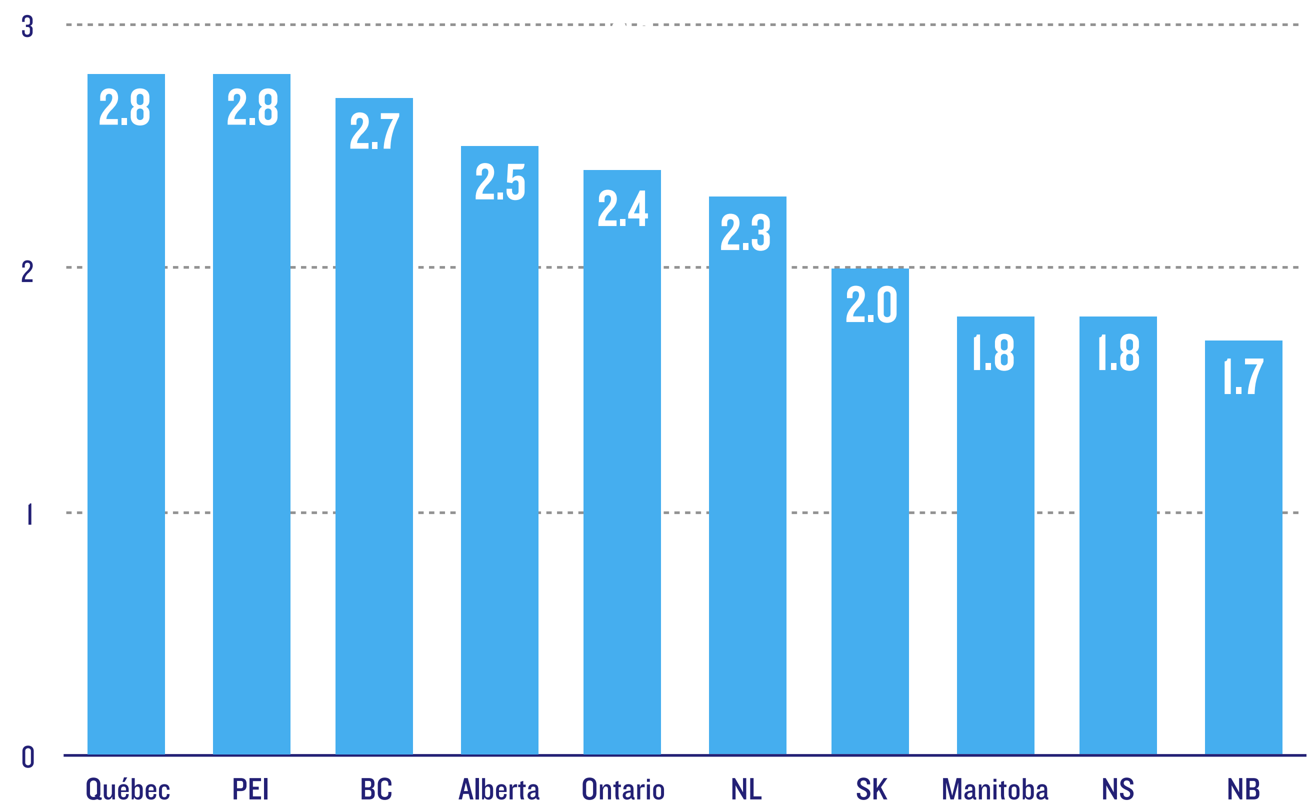
Frequency of Participation Per Month



When it comes to language spoken, Allophones (or those who speak a language other than English or French at home) are more culturally active than Anglophones or Francophones across the board. These cultural consumers, who are often first-generation immigrants or immigrants themselves, participate in 3.1 activities per month, compared to 2.1 for Anglophones and 2.7 for Francophones.

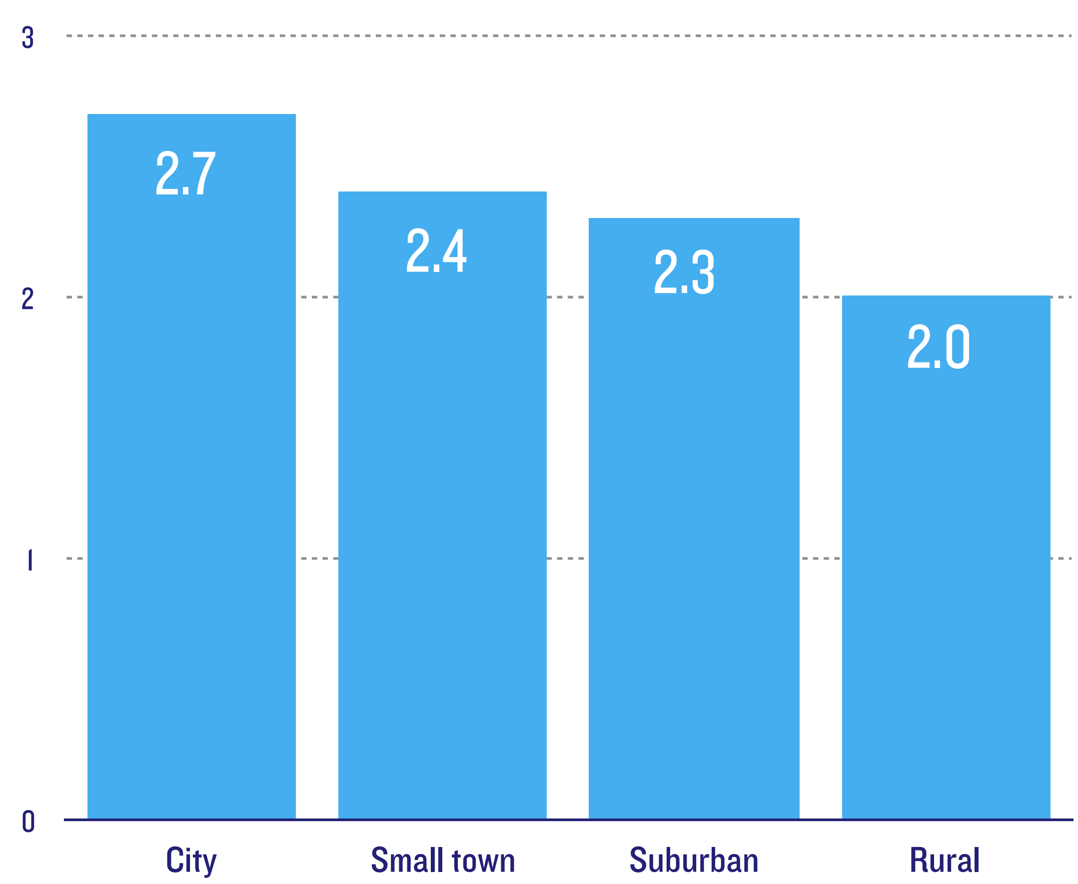
Frequency of Participation Per Month

There are also significant differences in participation by province, with Québec and Prince Edward Island residents engaging in the greatest number of cultural activities, and those in New Brunswick the least.

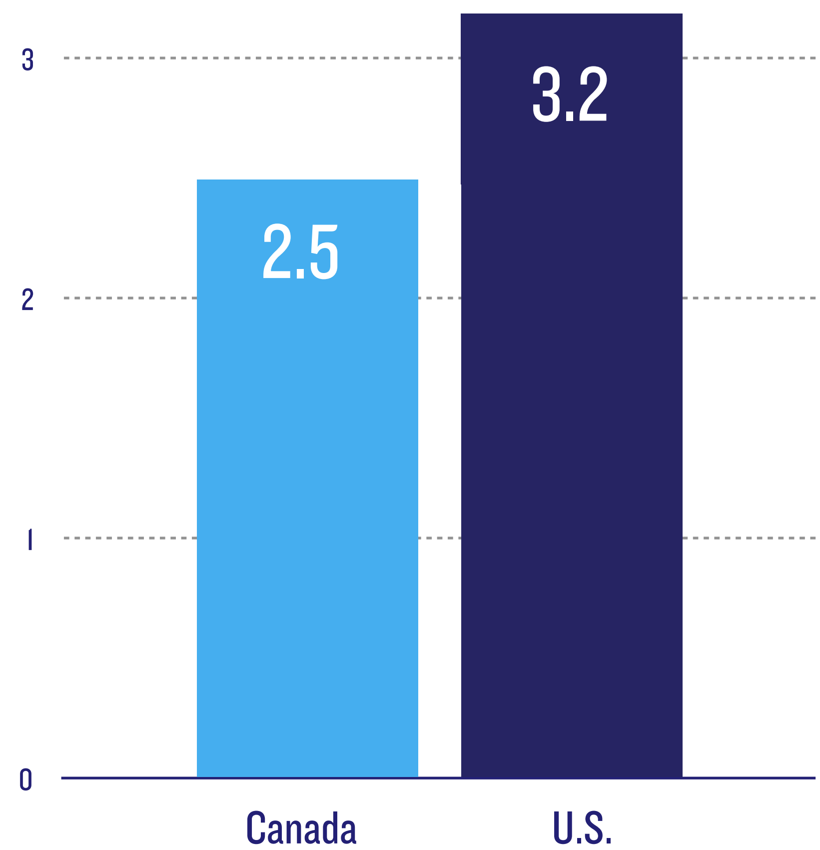


Frequency of Participation Per Month

Similarly, those residing in urban areas are more culturally active than those living outside of them. The gaps between urbanites' participation and that of those living in rural communities are largest for activities that may be more niche or specialized—such as jazz and film festivals—and are smallest for activities that are more broadly accessible, such as going to the cinema, watching television, and visiting a park.



Frequency of Participation Per Month



Finally, how do Canadian audiences stack up against their American counterparts in terms of cultural participation? American cultural consumers participate in over three cultural activities per month, compared to Canadian cultural consumers who only go to 2.5 per month.

This difference is most significant in rates of participation for activities that are more likely to be experienced within formal institutions, such as museums, opera, ballet, and zoos and aquaria; and less significant in rates of participation for activities that are less institutionally-based, such as historic attractions, festivals, art fairs, or public parks. One area where Canadians and Americans seemed to be aligned? Theatre. Both countries report nearly equal participation rates for musicals and non-musical plays, as well as for performing arts festivals.

Knowing which activities audiences are attending in Canada is important, but it is only one part of comprehending today's complex and ever-widening cultural landscape. As culture's definition becomes broader and broader, it is increasingly necessary to truly understand the role of these activities in today's world: why participants are drawn to them, and what audiences believe their impact is.

The most popular activities with audiences—from parks to festivals, food and drink experiences to aquaria—seem to share three core principles: community, connection, and discovery. These types of activities bring together audiences with shared interests, provide opportunity for sociability, and often expose participants to new things. What's more, these three principles directly map to audience's understanding of culture's greatest possible impact—belonging, empathy, and perspective—further reinforcing the perceived societal benefit of these most popular activities.

Community → Belonging

> **"Helps me to feel part of a collective or group with the same interests, and experience something together."**

The first principle is a sense of **community**. At its heart, culture brings people together, providing a sense of belonging and inclusion for audiences, and making them feel part of a greater whole.

Connection → Empathy

“Increases understanding and empathy for myself and others. Encourages people to be more understanding and compassionate.”

The second principle is a sense of connection. By connecting us with those both different and alike from us, culture fosters **empathy** and an understanding of the broader human condition beyond our own lived experiences.

Discovery → Perspective

“Exposes me to new ideas and experiences. I want to know more about the world and the people around me.”

The third principle is discovery. Culture exposes us to new ideas, histories, and ways of thinking. At their best, cultural experiences offer **perspective** on the world that we may not have had before.

What does all this mean? Canadian audiences are adamant: culture—broadly defined—matters in their lives. Whether by providing a sense of belonging through community, fostering empathy through connection with others, or bringing much needed perspective via a sense of discovery, culture has intrinsic, lasting value and is a force for good in our changing society.

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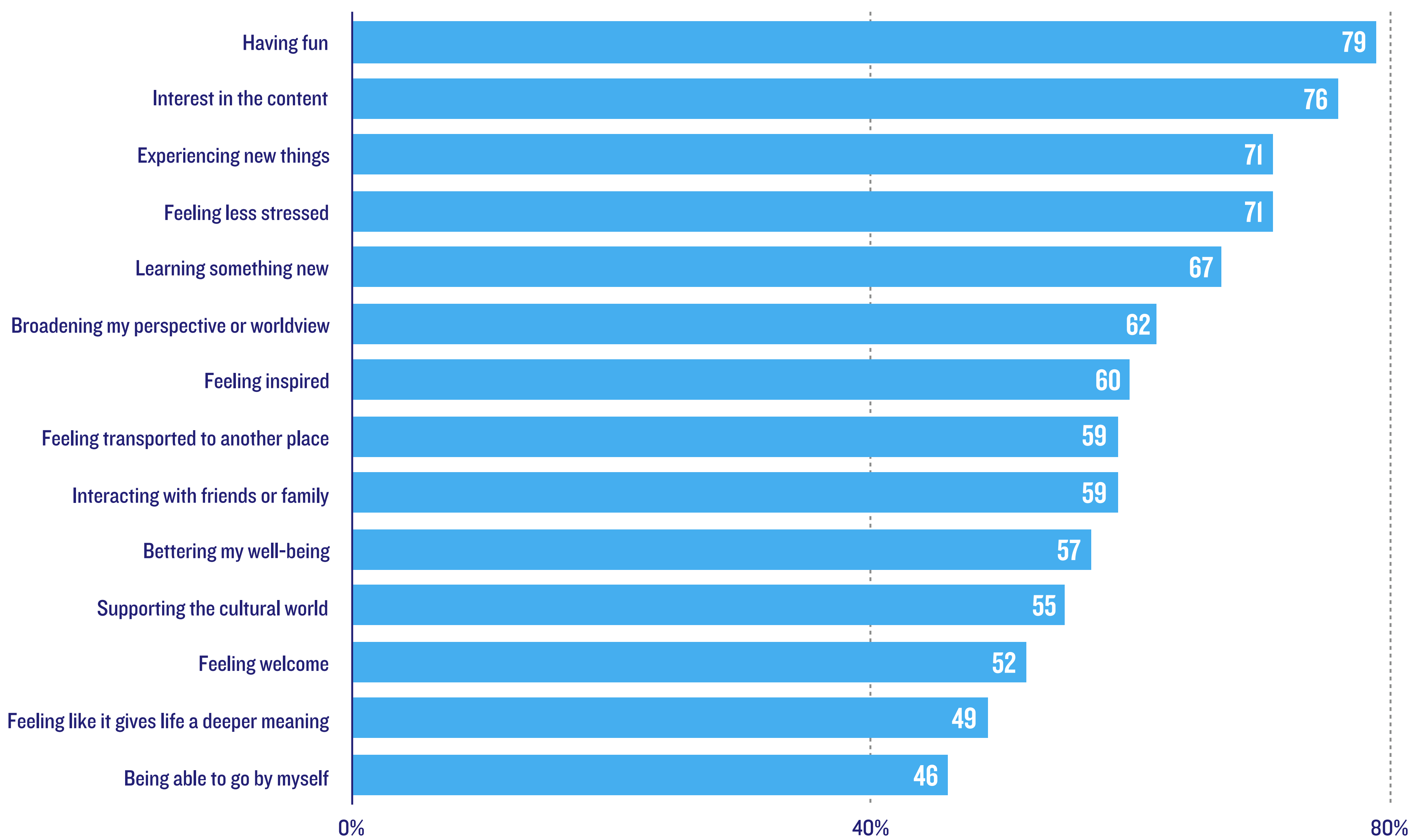
Today's Cultural Consumer

For every cultural organization, truly understanding the wants and needs of audiences is paramount. But in today's expanded field of cultural experience, what is the mindset of today's cultural consumer? Why is it that they engage with culture in the first place? And what causes them to stay away?

Motivators For Cultural Participation



Audiences are driven to attend cultural activities for a variety of different reasons. The single greatest motivator, however, is unanimous: having fun. Cultural organizations may scoff at the word "fun" because it seems to distract from their missions, but audiences believe they are not mutually exclusive.

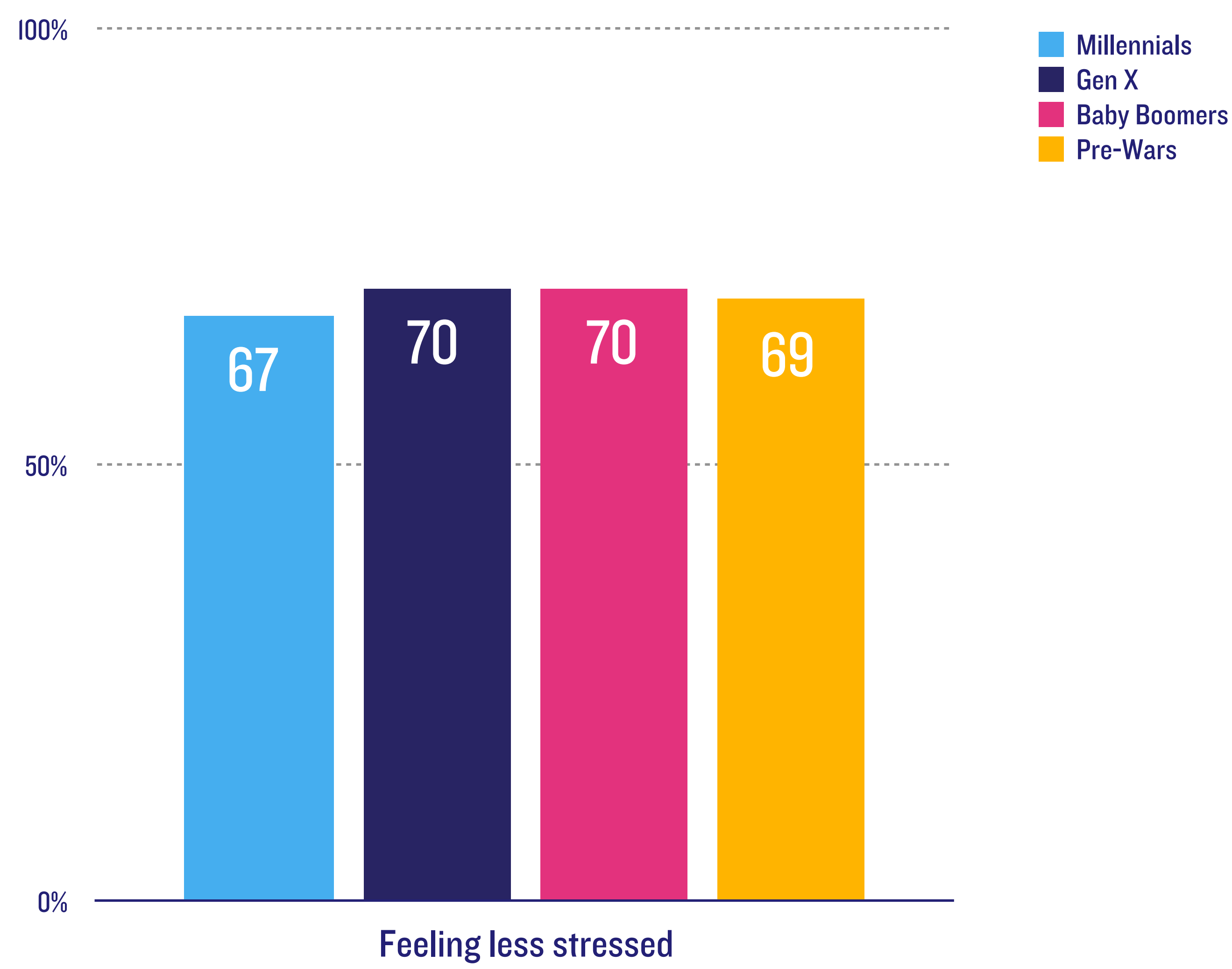
Characteristics of an Ideal Cultural Activity

1. Social
2. Lively
3. Interactive

Of course, the definition of “fun” is subjective for every individual, and what may be authentically “fun” for one organization may not make sense for another. However, we also know that audiences value certain characteristics in their ideal cultural experience, and these can help point the way to what “having fun” means within this cultural context. For cultural consumers, the top three characteristics of their ideal experience are “social,” “lively,” and “interactive”—indicating that a “fun” cultural experience is, at its core, participatory, dynamic, and rich in social connection.

The desire for “fun,” however, is not the end-all be-all for audiences; they have a variety of other important reasons for participating in cultural activities. For example, all things “new” seem to be critical drivers for audiences, who seek out culture as an important element of their personal development and exposure to fresh ideas.

Motivators For Cultural Participation



Culture's unique ability to relieve stress is also a significant motivator to participation, and this sentiment is reported consistently across generations. Whether by providing a calming atmosphere, a seamless visitor experience, or accessible content, audiences look to cultural experiences to reduce anxiety, not add to it.

For all of these motivators, Canadian and American cultural consumers are far more alike than they are different. Audiences from both countries said "having fun" was their top motivator to participating in culture, followed by an interest in the content, the ability to experience something new, and reducing their anxiety.

Barriers to Cultural Participation

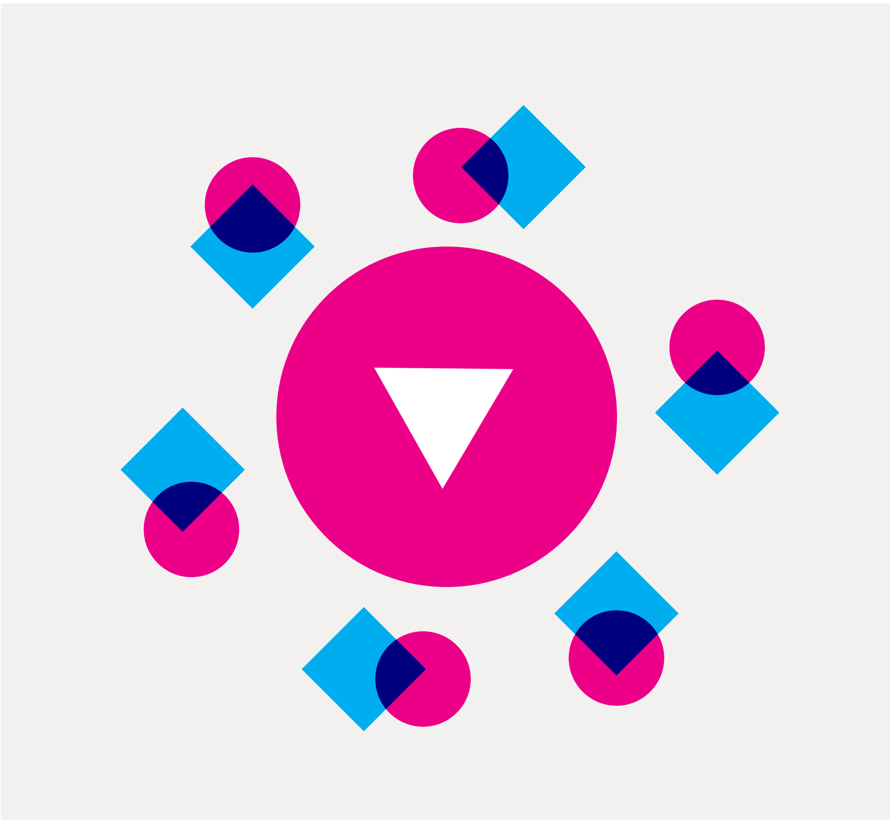
1. It's not for someone like me
2. The cost is too high
3. Location is too far
4. I didn't think of it
5. Timing is inconvenient

On the flip side, it is also important to consider why culture can drive audiences away. Irrelevance is more often than not the culprit: the primary barrier to participation for Canadian cultural consumers is feeling that a cultural activity is "not for someone like me"—the top barrier in the U.S. as well. For Canadian audiences, this is followed by the cost being too high, the location being inconvenient, a lack of awareness, and inconvenient timing.

As in the U.S., this data illustrates the stark reality that the greatest barrier to cultural participation is not related to the logistical concerns that cultural organization so often focus on, but rather to a lack of personal relevance. Fixing this perception and addressing the underlying reasons why it exists are the most important challenges for organizations moving forward.

Today’s Cultural Consumer

Spotlight Stats

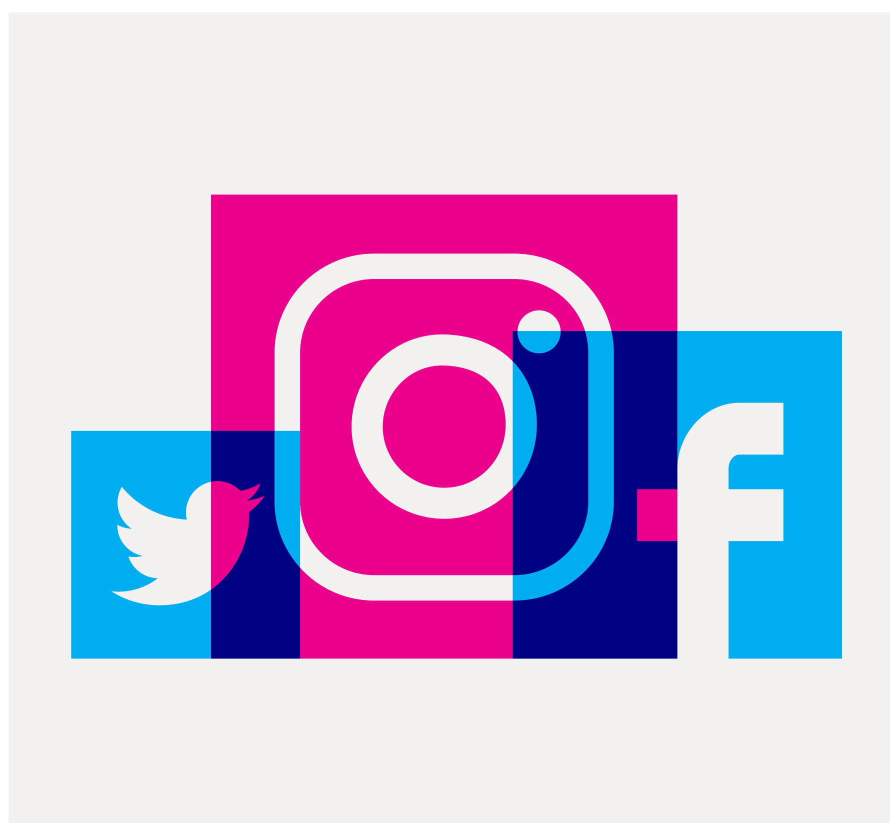


Representation matters.

While the majority of diverse audiences who are cultural consumers report feeling included within cultural experiences, there is more progress to be made. Fourteen percent (14%) of Indigenous peoples and people of colour say they did not participate in cultural activities in the past year because the activities didn’t “reflect people of all backgrounds” compared to only 8% of whites—a 65% difference.

To reach younger generations, meet them where they live.

When it comes to getting people in the door, what forms of marketing matter most to cultural consumers? While all audiences say print advertisements are most influential, for younger generations social media ad postings take the top spot, noticeably beating other, more traditional media forms. In fact, Millennials view print ads as less likely to inspire them to participate than even radio or outdoor advertising, and are also more persuaded by ads on music streaming services and podcasts than older cultural audiences are.



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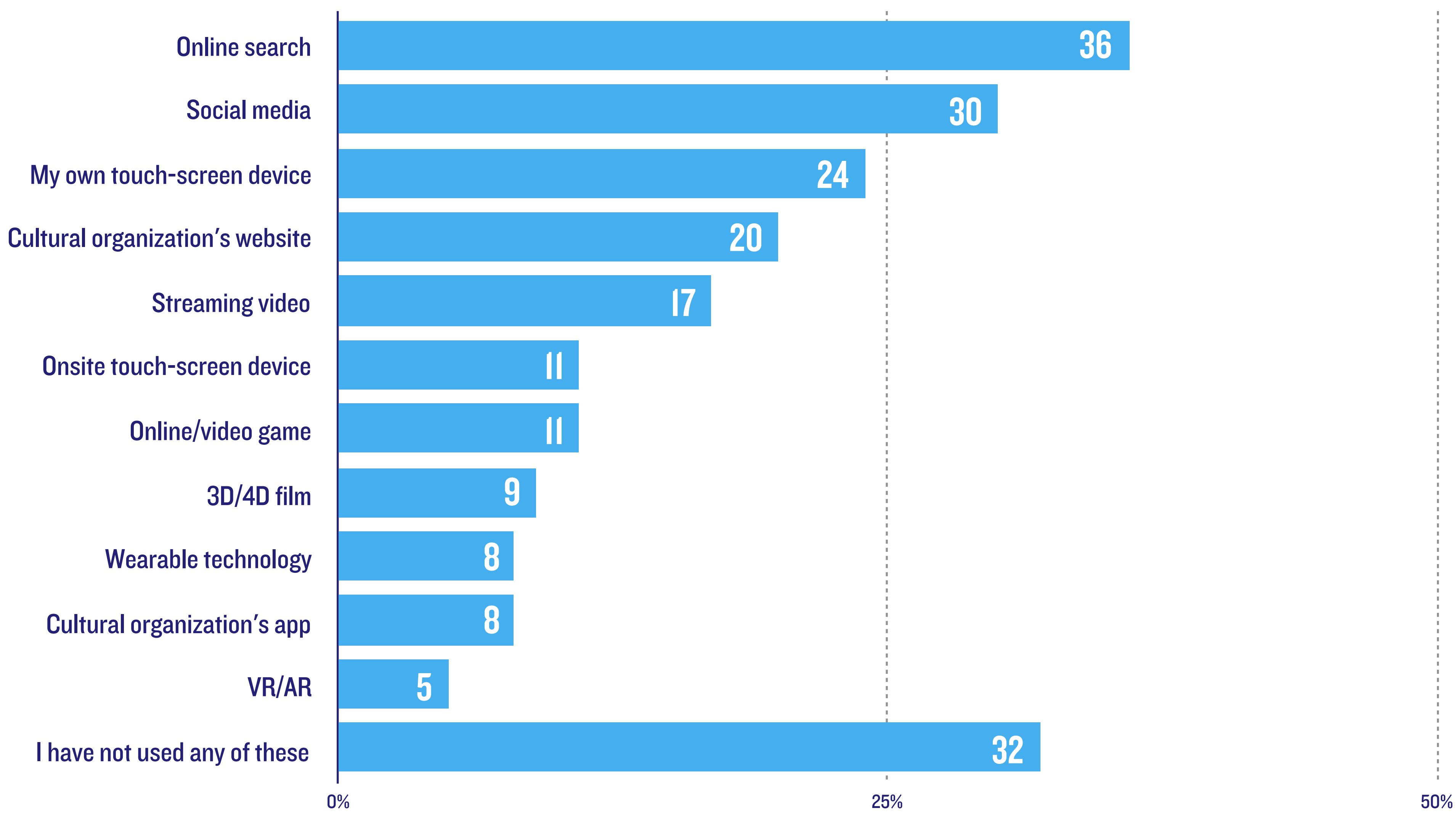
The Tech Lag

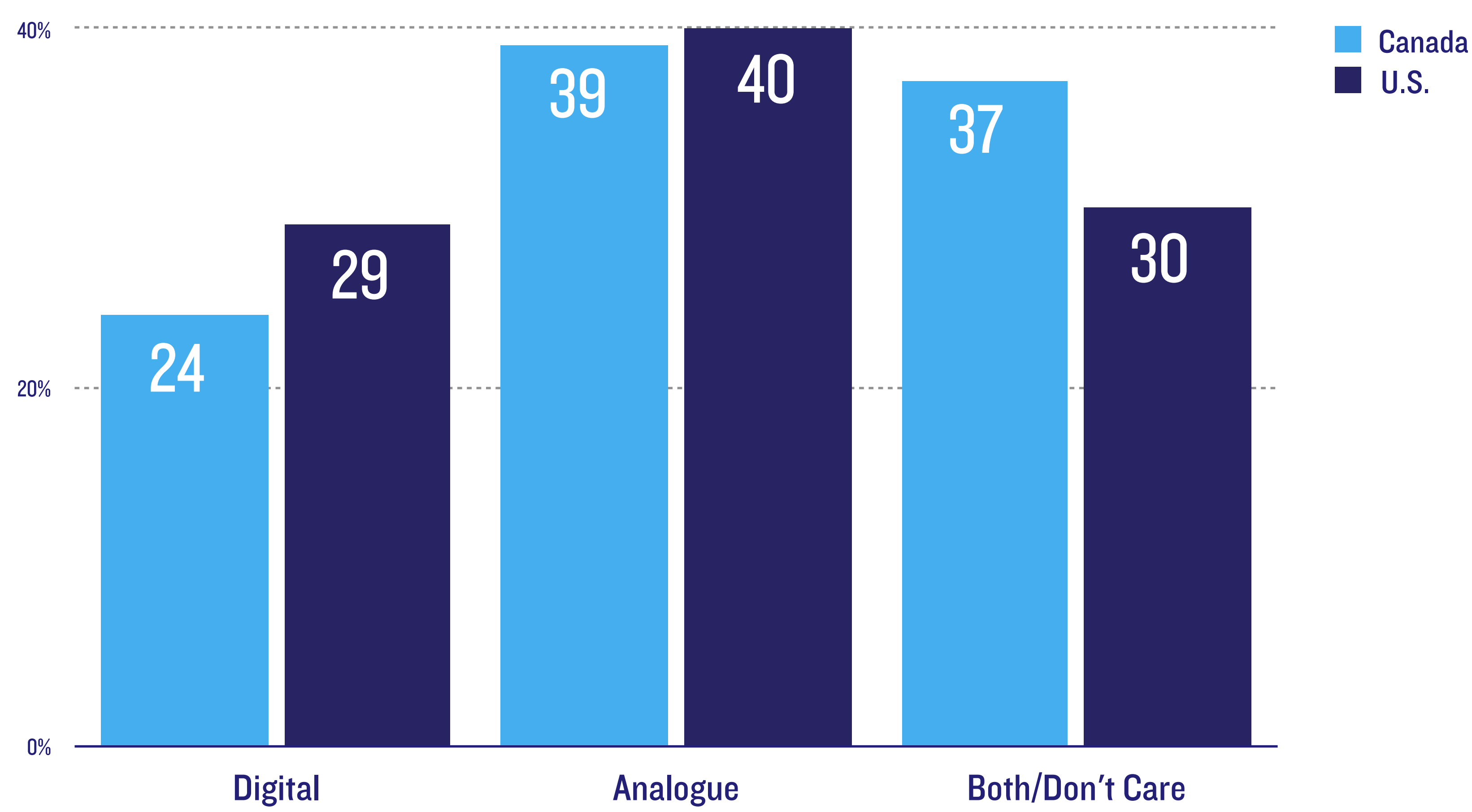
It goes without saying that digital technology has fundamentally revolutionized how we engage in nearly every aspect of society. From the way we consume information to how we communicate with others, technology has never been more omnipresent, with both large and small parts of daily life so often mediated by—and filtered through—our digital devices.

Use of Technology in the Past Year as Part of Cultural Activity



Yet despite its ubiquity, the role of digital technology within the cultural sector continues to be one of the field’s most perplexing issues. In a moment of growing interest in (and funding for) increasingly high-tech digital solutions such as virtual reality or wearable technology, Canadian audiences in 2018 remain relatively low-tech. For instance, over a third say they used online search as part of a cultural activity in the past year, in comparison to only 8% who said they used a cultural organization’s own app. Noticeably, a full 32% said they haven’t used any digital tool as part of a cultural activity, implying a good portion of cultural consumers have either not been exposed to digital technology within the cultural experience, or simply have not bought into its necessity.

Desire for Digital or Analogue Cultural Activities



Currently, Canadian cultural consumers, as well as their American counterparts, are divided on whether technology should play a role in the cultural experience at all. Only about a quarter of Canadian audiences said they prefer a digitally-mediated cultural experience, a percentage roughly equal to that of American audiences. In comparison, 39% of Canadian audiences and 40% of Americans said they prefer an analogue experience. What is probably most surprising is a full 37% of Canadian audiences and 30% of American audiences don't have a strong opinion at all when it comes to deciding between digital or analogue.

Top Reasons Why Digital Appeals in Cultural Activities

1. Access to more detailed info
2. Ability to revisit the experience later
3. Deeper understanding of content
4. Makes the activity feel new

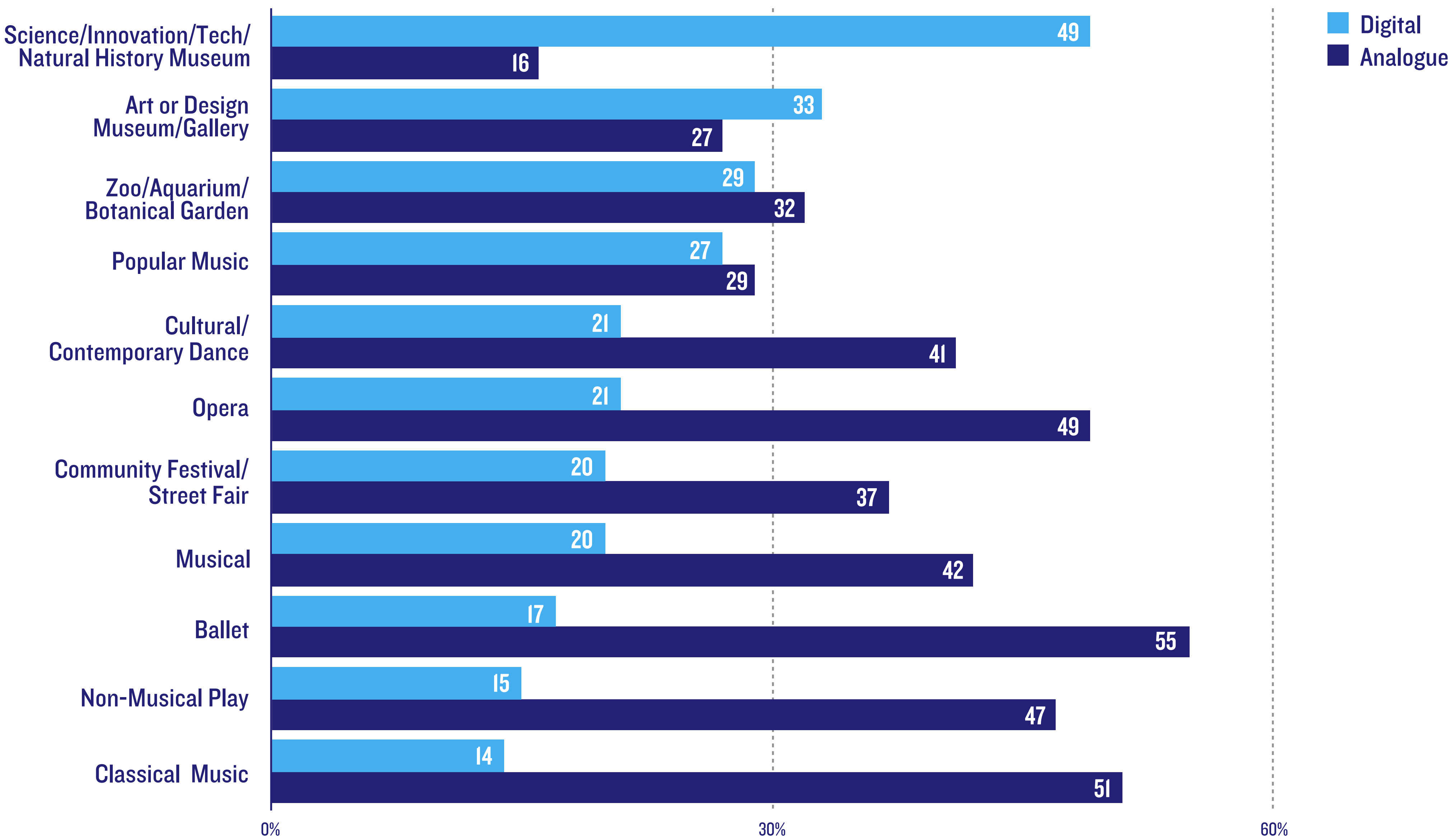
To better understand audiences' appetites for new forms of tech going forward, it will be crucial to more fully dimensionalize this divide in opinion. Canadian cultural consumers who find digital interventions in culture appealing appreciate how these interventions can deepen the experience by curating additional information and providing an increased understanding of the content. These audiences are also drawn by the opportunity to "relive" the experience later through digital means—an important distinction from U.S. cultural consumers, who did not rate this benefit so highly. Those who prefer digital in their cultural experiences also see technology as a way to bring novelty to the activities by remaking them in new and innovative ways.

Top Reasons Why Analogue Appeals in Cultural Activities

1. Feels more authentic
2. More focus on the activity
3. More enjoyable
4. Is simpler

Equally interesting, however, are the reasons why audiences find cultural experiences without digital integration appealing. For these individuals, analogue activities feel more authentic to the way they believe the activity was meant to be experienced. Technology can also be seen as an interruptive force, impeding audiences' ability to focus on the activity and derive enjoyment.

Interest in Digital or Analogue as Part of Cultural Activity



Audiences' opinions on whether digital should have a place or not within the cultural experience are also highly specific to the types of activities in question. While audiences may welcome technology in, for instance, a natural history museum, fewer are yearning for it in activities like classical music or ballet.

It should be noted, however, that these responses reflect only current audience desires, based on their own familiarity and lived experience with digital technology in certain activities. In this rapidly changing landscape, we can't expect audiences to predict for us what the future of tech might be. Instead, it is up to cultural organizations (and those who support them) to prototype new solutions that will respond to audiences' underlying assessment of technology's greatest benefits, as well as its inherent drawbacks. When exploring a new digital strategy or initiative, start by asking: Will it enrich or distract? Will it simplify the experience, or make it more complicated? And most importantly, will it feel authentic to who we are and how our audiences engage with us?

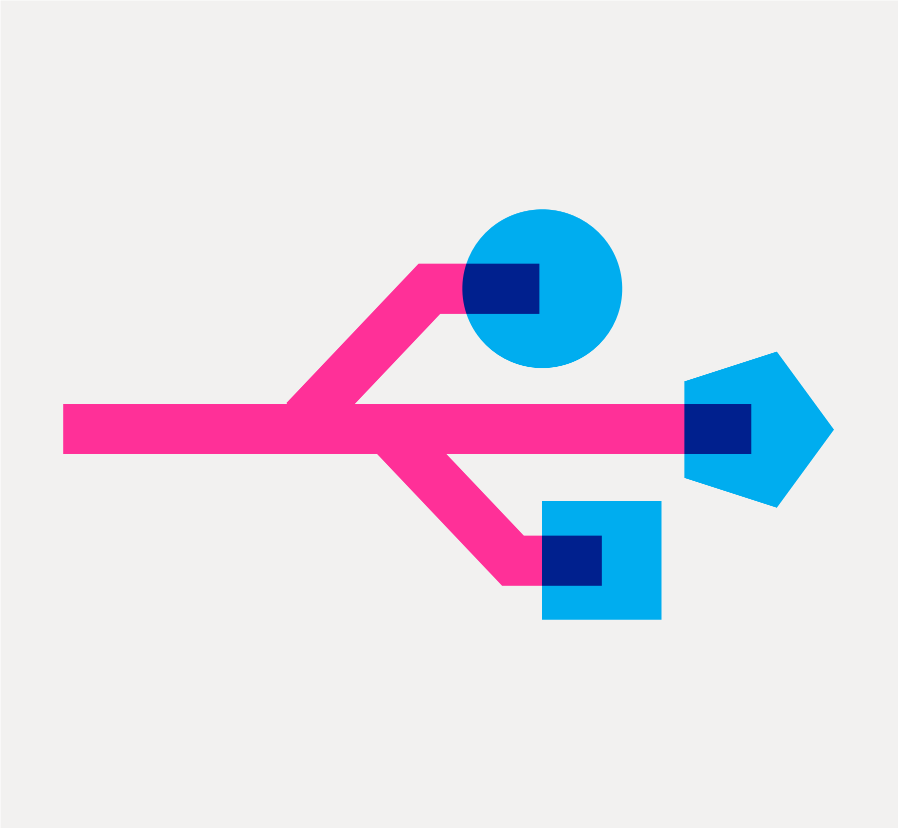
Spotlight Stats

There's an app for that—but no one's using it.

Many cultural organizations are prioritizing the development of proprietary software—such as institutional mobile apps—to help visitors with ticketing or wayfinding, or to offer a greater level of information than is provided onsite. Yet, audiences are nearly five times more likely to use an online search engine like Google than a mobile app, indicating a readiness to go to trusted third party sources for information. The good news for the future is that younger generations seem slightly more receptive to mobile apps in general, with 11% of Millennials saying they used an organization's mobile app as part of a cultural experience in the past year, compared to 10% of Gen Xers, 5% of Baby Boomers, and 3% of Pre-Wars.

Digital can open the door for new audiences.

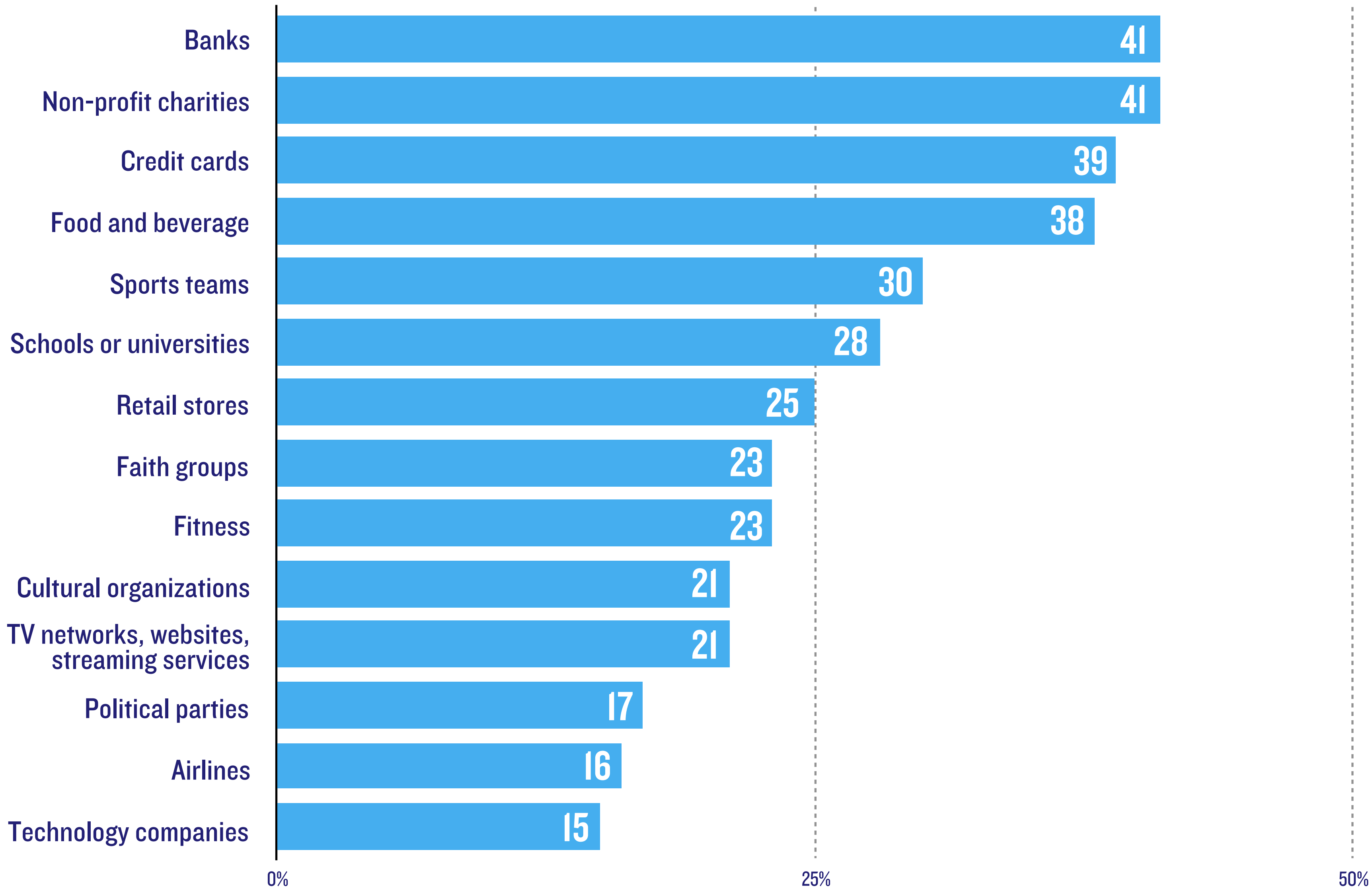
Indigenous peoples and people of colour are more likely than white audiences to be motivated to participate in a cultural activity because of posts on social media, making digital channels especially useful for raising awareness of cultural activities among these audience segments. But digital's utility goes beyond just marketing: Indigenous peoples and people of colour are also nearly two times more likely to want a digital or virtual component as part of their ideal cultural experience, suggesting digital can be used as an even broader tool to facilitate engagement for diverse audiences.



5

The Future of Affinity

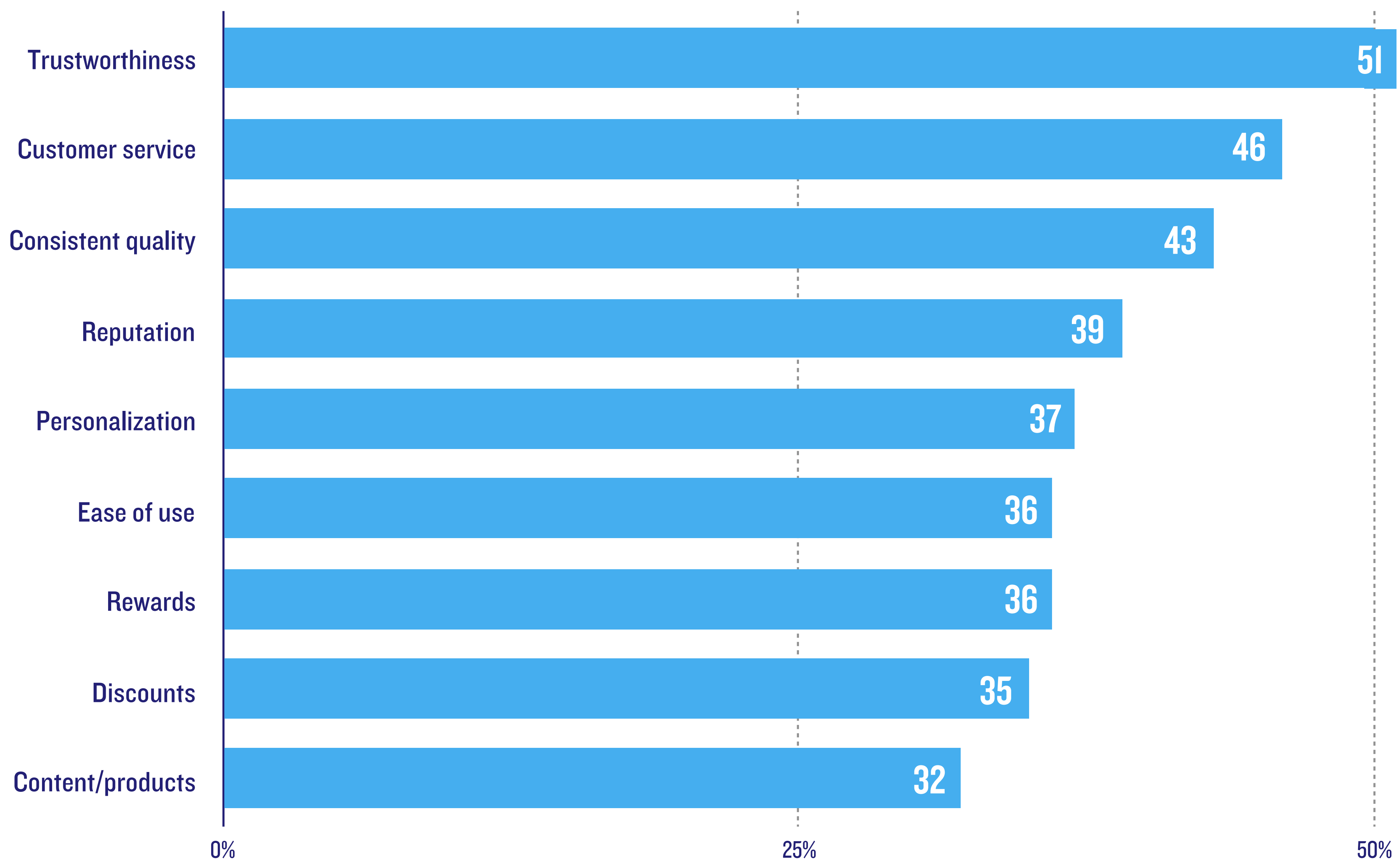
Audience Personal Commitments



Every day, Canadian cultural consumers demonstrate affinity to a wide range of companies and organizations. Whether it be a favourite corner coffee shop where the barista knows their name or to the sports team they have season tickets to, all audiences are personally committed to something—and each of these companies or organizations are competing for audiences' time, money, and attention. Crucially, in comparison to many of these companies or organizations, culture is relatively low on the list, falling just above political parties and airlines in the eyes of cultural consumers.

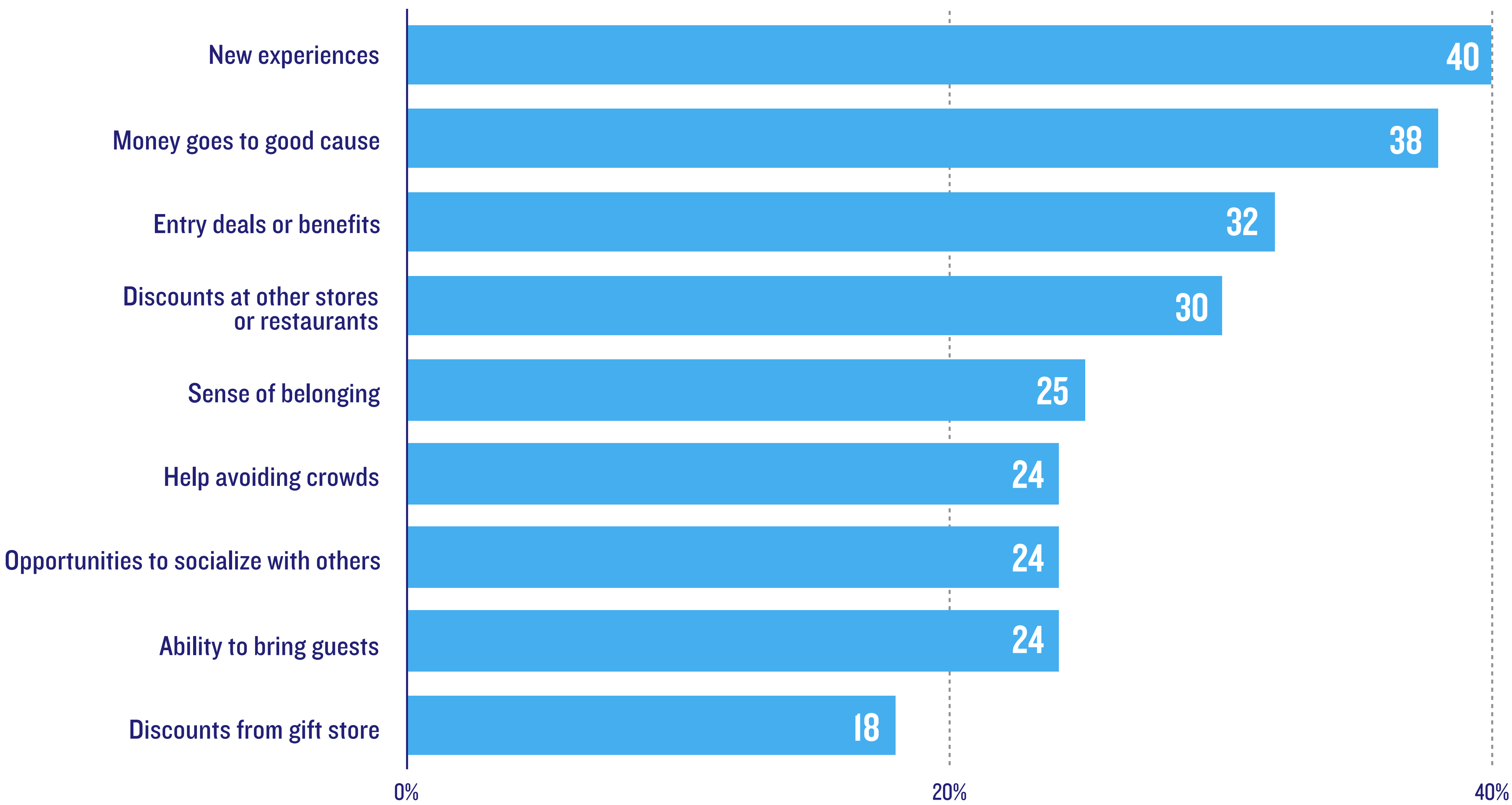
To understand why personal commitment to cultural organizations is so low—and why commitment to many other types of companies or organizations is comparatively higher—we assessed audiences' affinity behaviours from the "outside in," exploring audience relationships with entities beyond culture to help inform what the future of affinity might look like within the cultural sphere.

Motivators for Personal Commitment



We found that the motivators for personal commitment go far beyond the economic and the transactional. Audiences view their affinity to an organization as a personal relationship, and their ideal partner is trustworthy (the top motivator, at 51%), kind (with 46% citing "quality of customer service"), and consistent (with 43% citing "consistent quality"). In this respect, Canadian cultural consumers are quite similar to their American counterparts, who also reported these same three attributes as most important for inspiring their personal commitment.

Motivators for Joining a Cultural Loyalty Program



Understanding what is driving affinity to a broad array of companies or organizations is the first step in rethinking how cultural organizations can better instill personal commitment in their audiences. But Canadian cultural consumers also have opinions regarding the best parts of traditional loyalty programs (such as museum memberships or theatre subscriptions) specifically within the cultural context. Similarly, transactional benefits like perks or discounts are not most persuasive. Instead, the ability to have new experiences, as well as simply knowing that their money is going to a good cause, most motivate audiences to join.

We have reached a tipping point, where new models for personal commitment within the cultural sector must be developed in order to forge meaningful relationships with audiences. Based on what cultural consumers are telling us, these new models must be based on relationships, not transactions; driven by new experiences on offer; and focused on impact.

Spotlight Stats

For younger generations, a “like” goes a long way.

The types of companies or causes we rally around say a lot about us, but the way we show our support is telling as well. Compared to older generations, cultural consumers under 35 years old are almost twice as likely to express their personal commitment to a company or organization by engaging with it on social media, an authentic act of affinity that shouldn’t be ignored. Younger consumers are also less likely to define loyalty as being a part of a customer loyalty program, volunteering, or donating money—implying that traditional notions of what personal commitment means may not apply to them.

For parents, culture is a family affair.

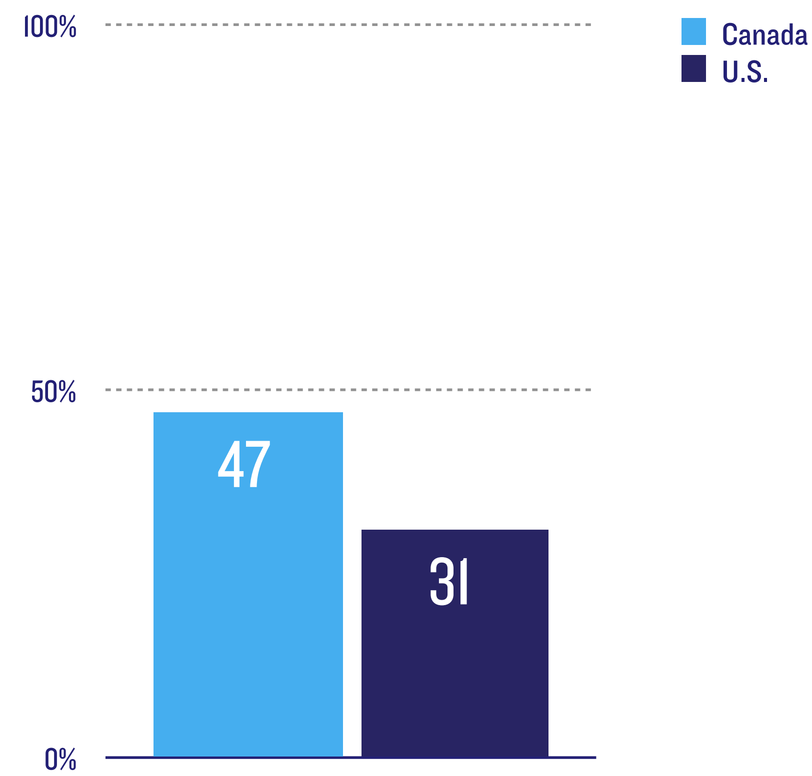
When thinking about formal loyalty programs that will build greater affinity for your organization, keep busy parents in mind. Parents are 60% more likely to be a part of a loyalty program than non-parents, and they are more likely to join because of benefits that will make their life easier and the experience more seamless, such as personalization, the ability to avoid crowds, and access to other organizations.

Note: Culturally active parents engaging in at least one cultural loyalty program in the past year, n=160.

6

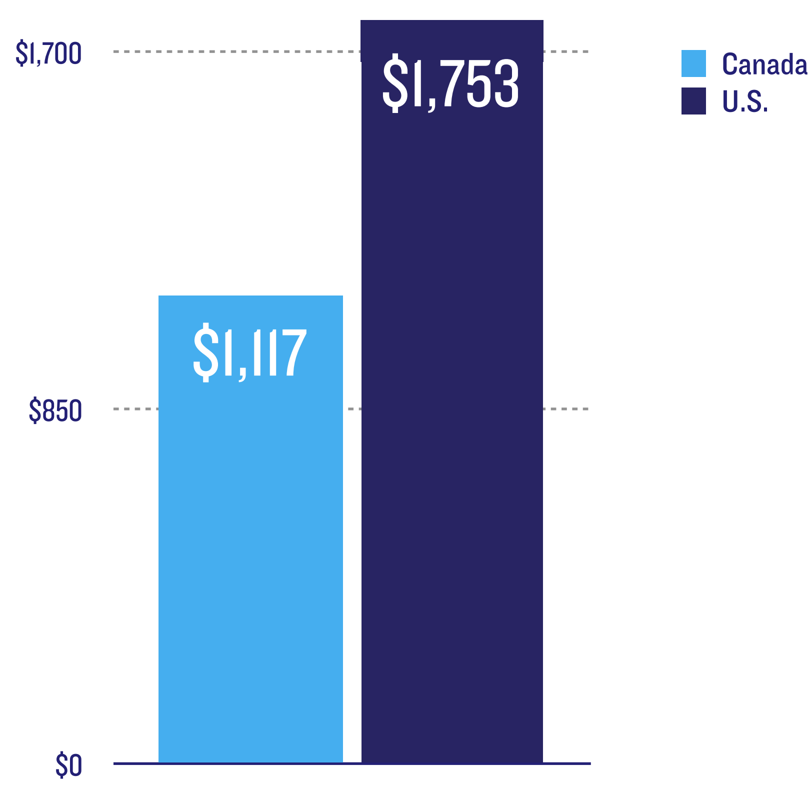
The Giving Gap

Donate to Charities or Organizations



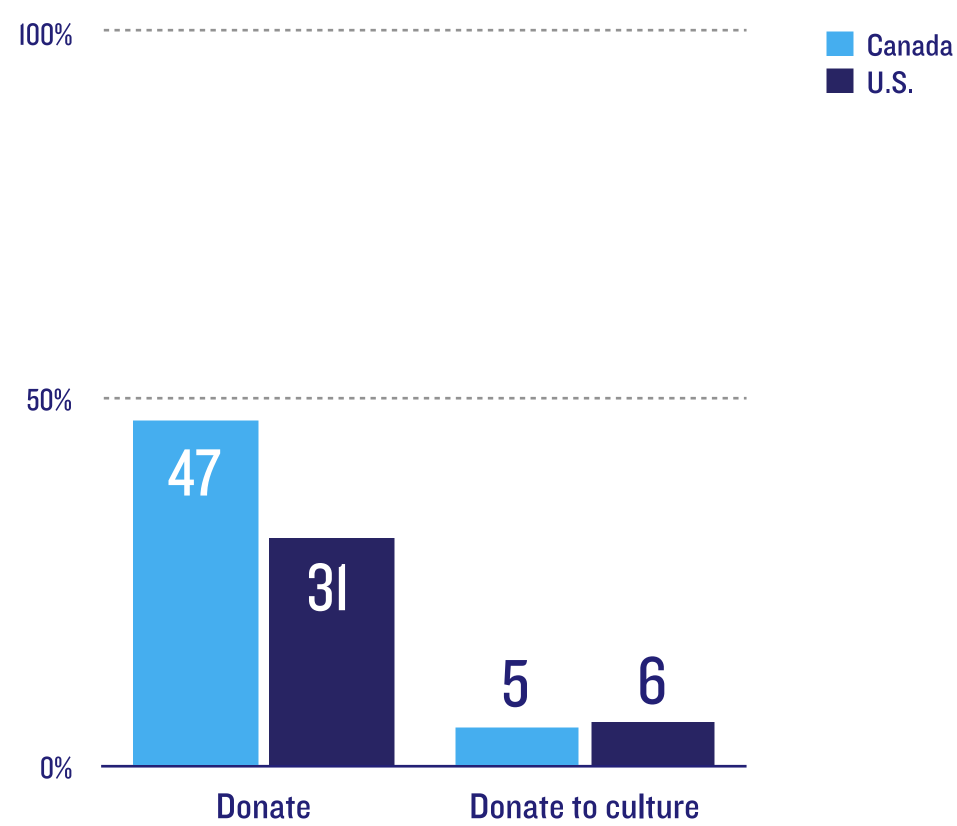
When it comes to giving back, Canadians are known for their generosity. Nationwide, 47% of Canadian cultural consumers have donated to a charity or organization in the past year.

Average Annual Donation



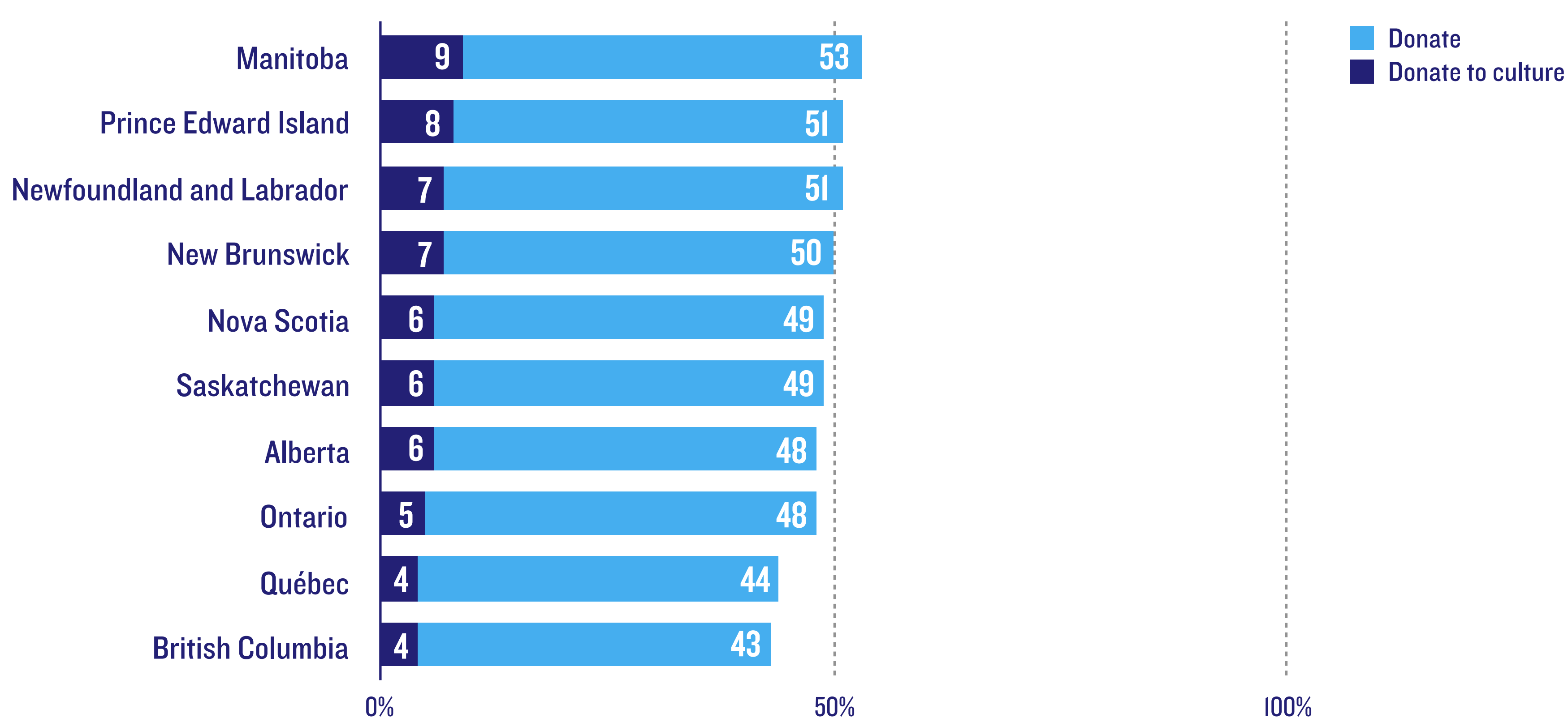
In addition, when compared to American cultural consumers, Canadian's philanthropic spirit becomes even more distinct. While American audiences give more in actual dollar amounts, a higher percentage of Canadian audiences say they give, suggesting the existence of a larger base of philanthropic support in Canada that all organizations can tap into. Canadian cultural consumers also give to a greater number of charities or organizations annually than their American counterparts (5.1 compared to 4.3, on average).

Donate to Charities or Organizations



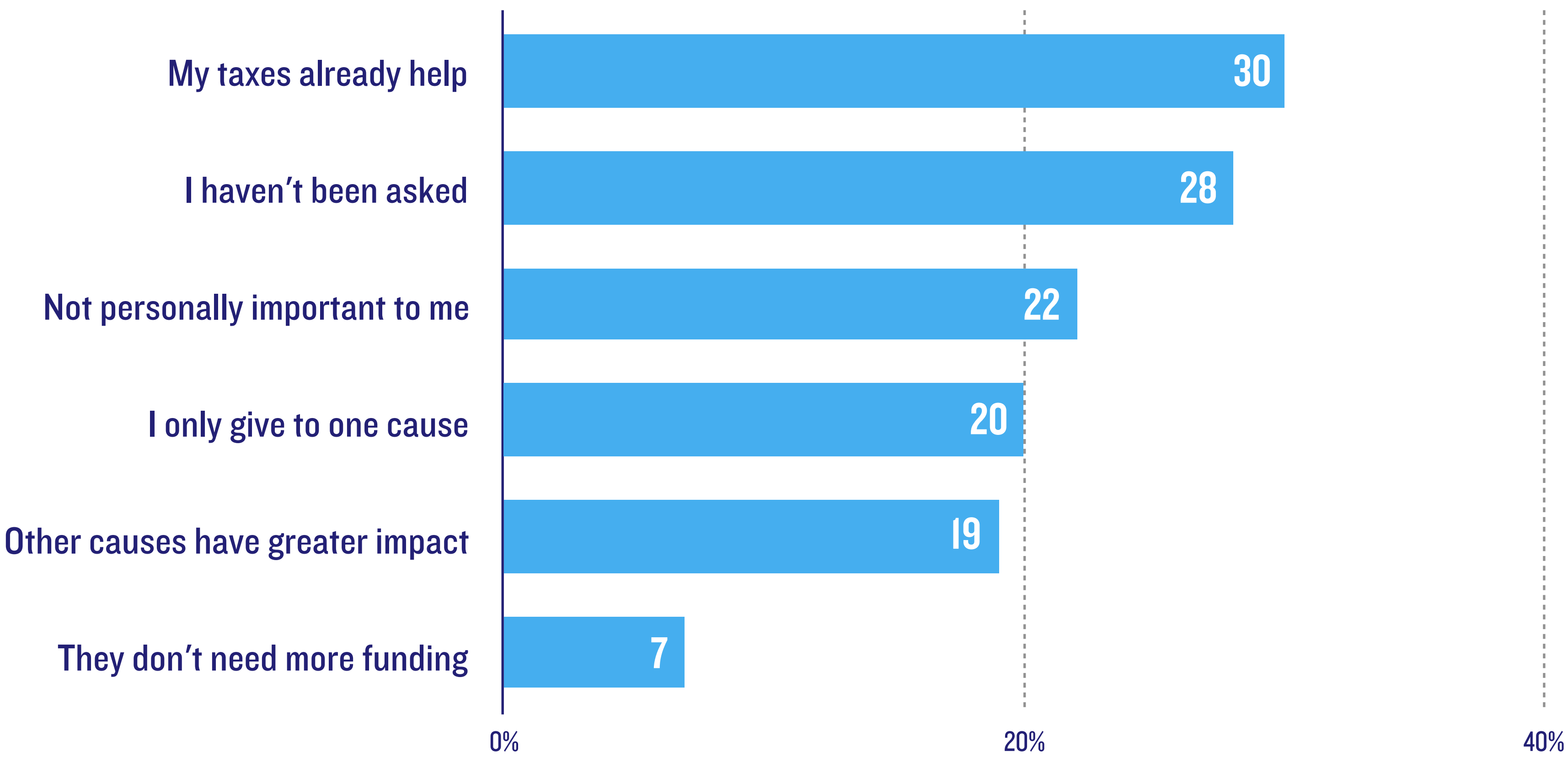
But what do Canadian cultural consumers actually give to? Unfortunately, it's often not culture. While 47% of all Canadian audiences nationwide say they give to charities or organizations of any type, only 5% of all audiences say they give specifically to culture (a percentage point consistent with the U.S., where only 6% of all American audiences say they give to culture).

Donate to Charities or Organizations



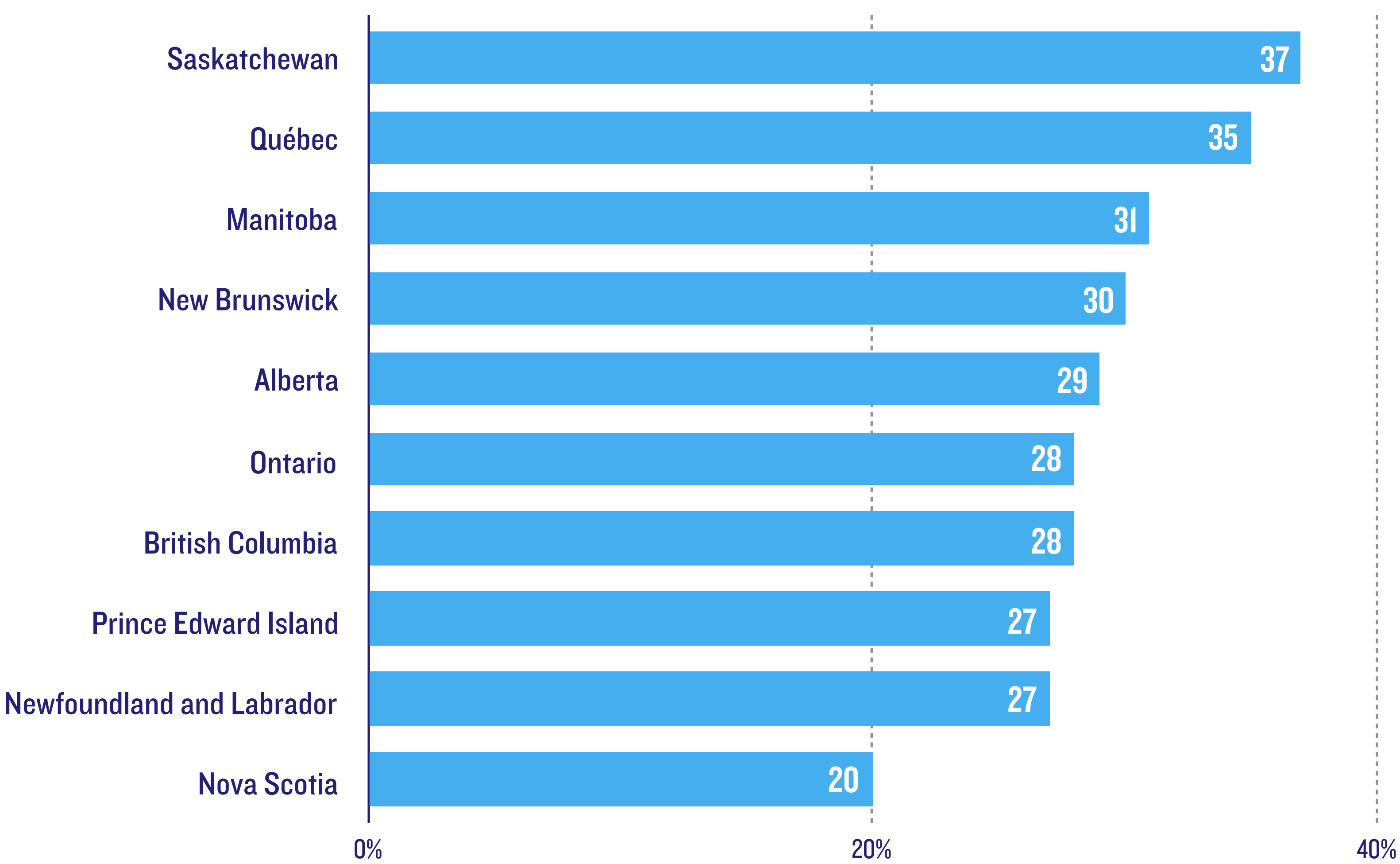
And while there are real differences in rates of giving on the provincial level (with Manitobans contributing to culture the most, and British Columbians and Québecers donating the least), the overall picture is the same: audiences are philanthropically generous, but culture is rarely their priority.

Reasons for Not Donating to Culture



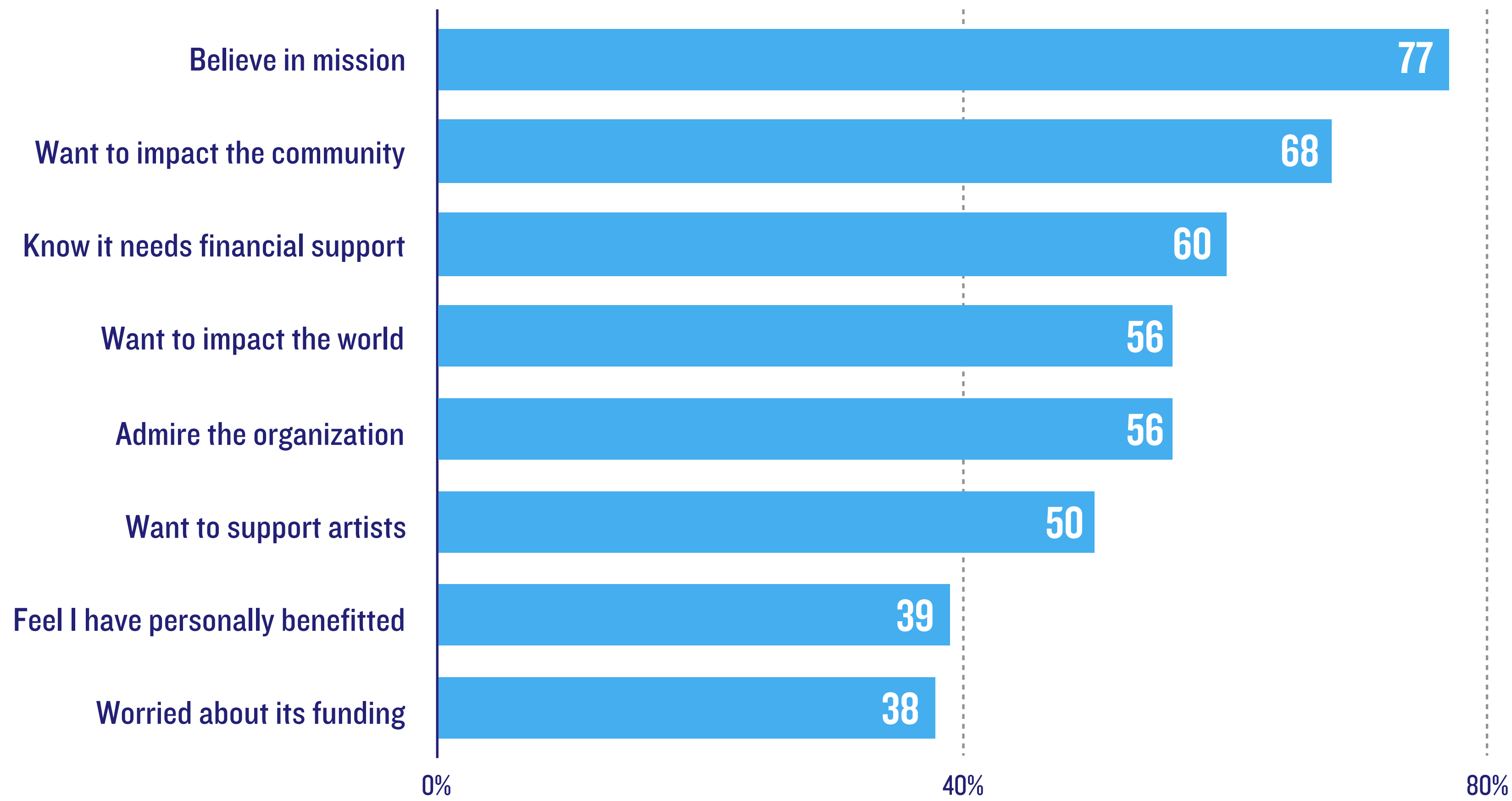
What might be behind this gap? The perception of governmental support is one crucial reason why audiences don't donate to culture. An opinion driven by older generations, a full 30% of non-donors say they don't give to culture because they believe their taxes already help.

Reasons for Not Donating to Culture: "My Taxes Already Help"



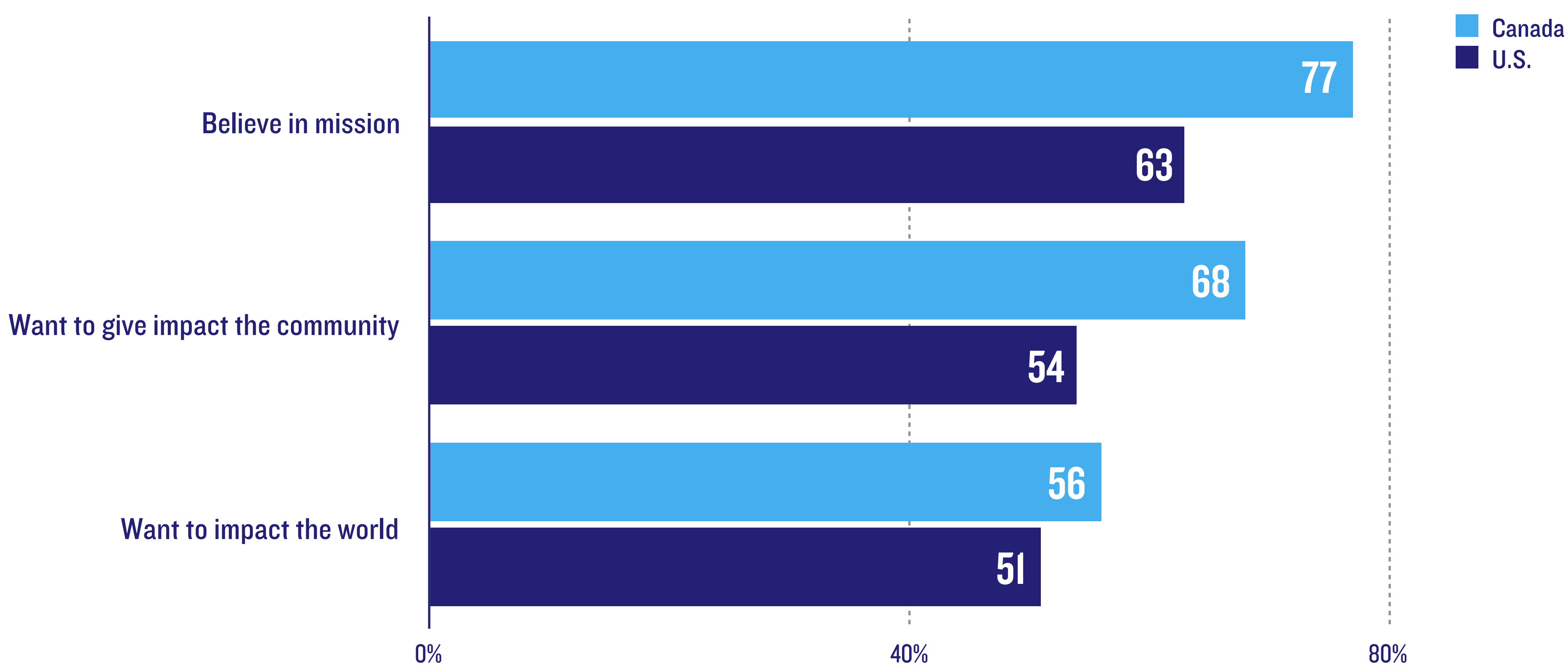
On the provincial level, this sentiment is reported most by those from Saskatchewan and Québec, and least by those living in Newfoundland and Labrador, and Nova Scotia.

Motivators for Donating to Culture



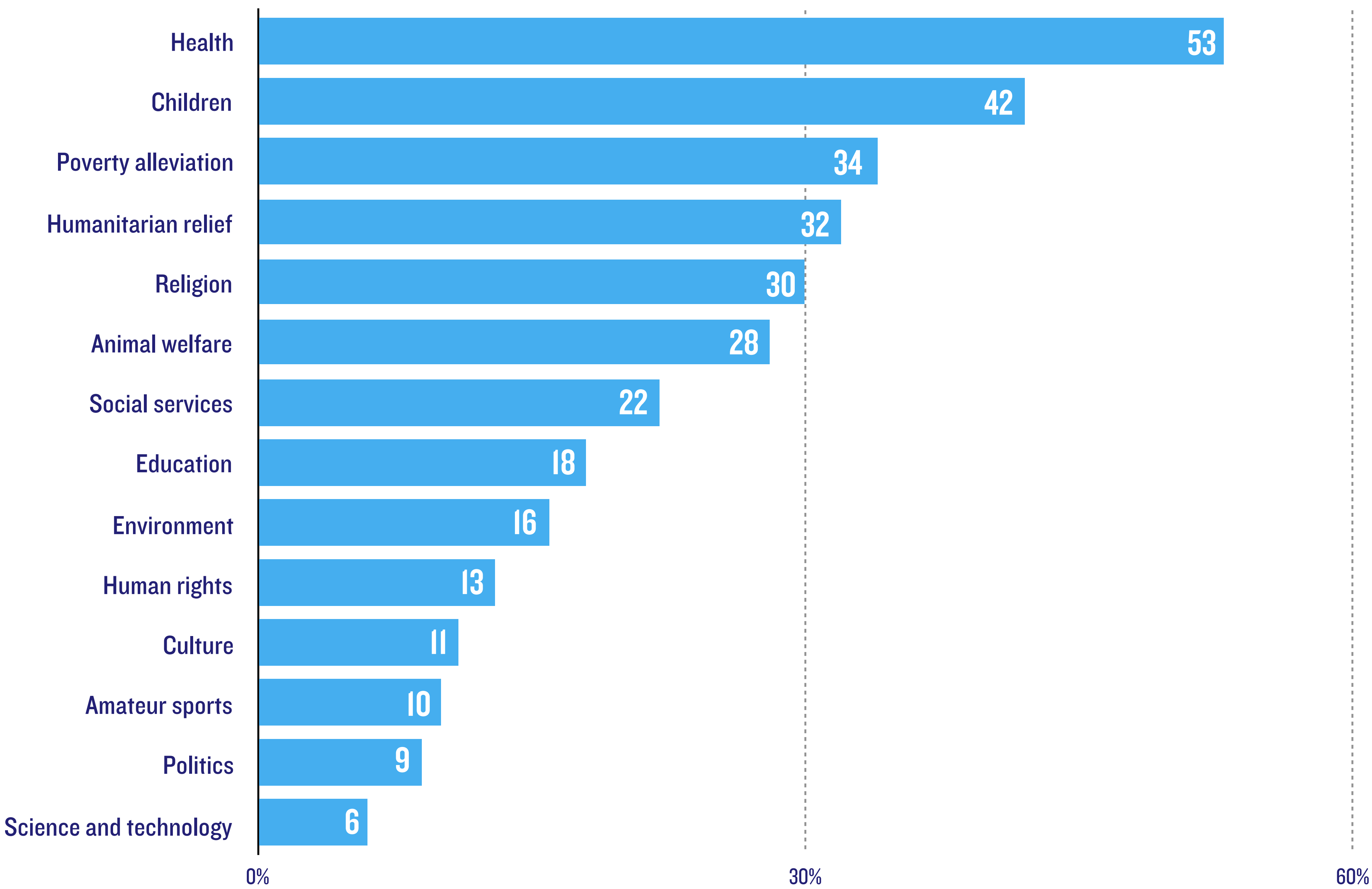
Canadian audiences who donate to cultural organizations list one key factor as their main motivator: social impact. Donors are more inclined to contribute funds when they believe in an organization's mission, see its impact on the community, or recognize it can affect global change.

Motivators for Donating to Culture



While social impact is a top driver for donations to culture in the U.S., it is even more so for Canadian audiences.

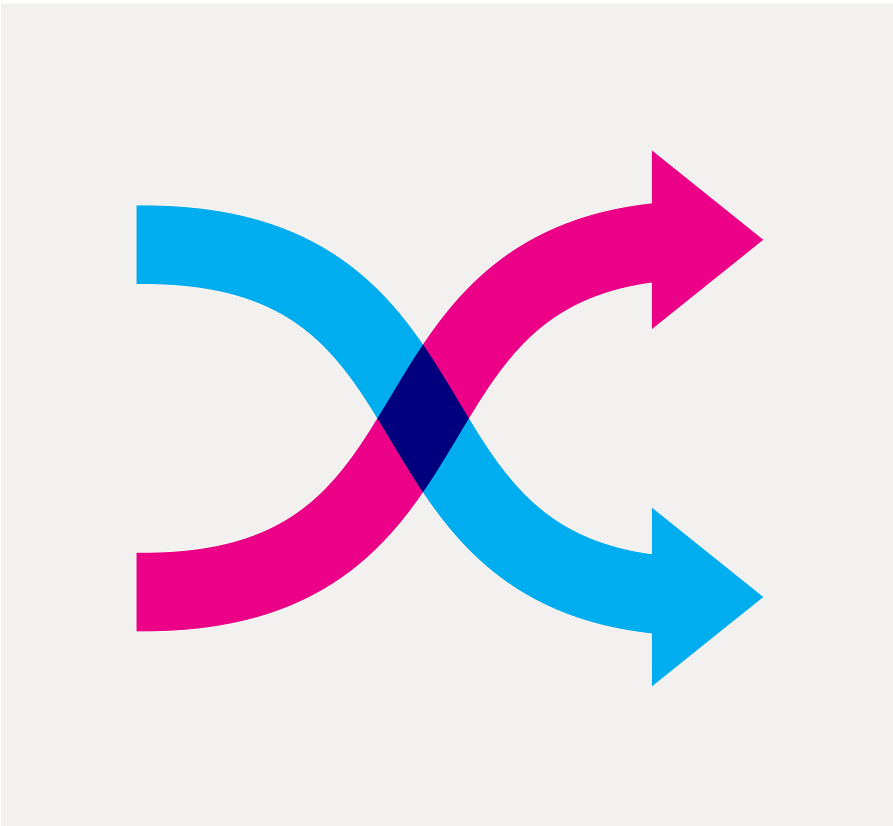
Comparative Appeal by Philanthropic Cause



The types of causes Canadian audiences donate to the most, such as health, children, and poverty alleviation, are ones with clear, measurable impact around the urgency of their need. While it may be no surprise that causes with such critical and tangible impact on global health and prosperity top the list, that shouldn't preclude the cultural community from making a case for culture's indelible impact within these areas, or from finding ways to prove culture's own essential role in nurturing belonging, empathy, and perspective.

With social impact as the main driver for donations, it is up to the cultural community, and stakeholders who support this sector, to help define and articulate culture's unique impact on individual and collective well-being, through either qualitative or quantitative means, without forgetting to emphasize to potential donors the critical need for private giving.

Spotlight Stats

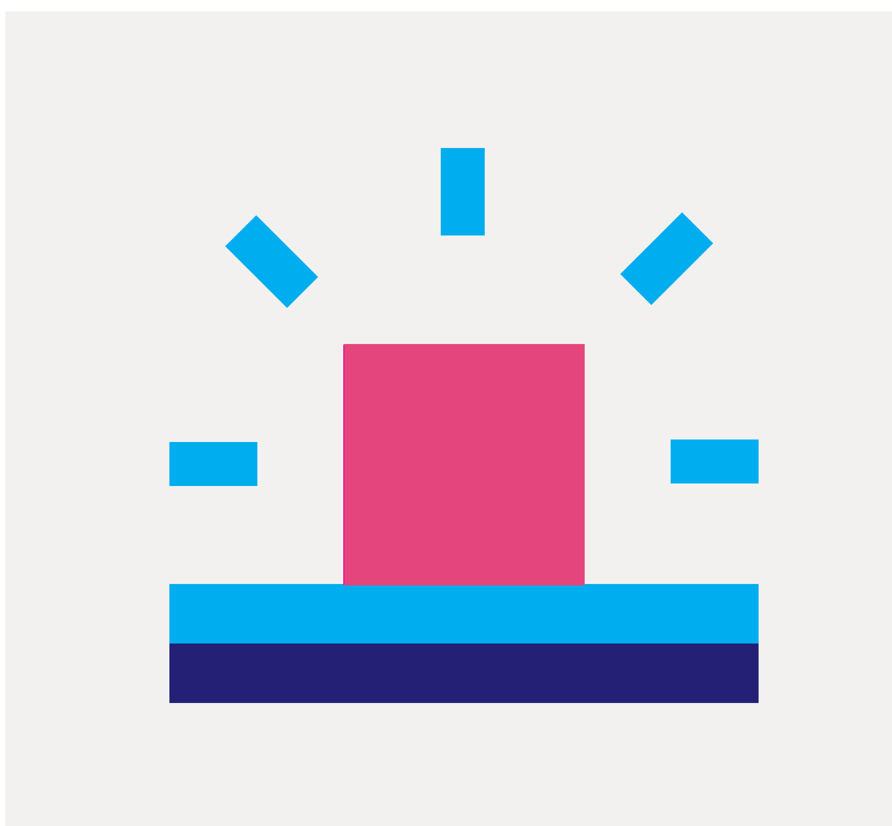


Social change inspires young philanthropists.

While older generations may have more disposable income to donate now, that doesn't mean younger donors should be discounted. In fact, these budding patrons have distinctive giving priorities that arts and culture organizations should take note of. Two causes uniquely near and dear to their hearts? Human rights and equality. Twenty percent of Millennial donors give to human rights, making them two thirds more likely than Gen-Xers, Baby Boomers, and Pre-Wars collectively to give to these types of causes (only 12% of older generations say they give to human rights causes). The difference is even greater for causes relating to equality: 15% of Millennial donors give to these causes, compared to only 6% of older generations.

Corporate sponsorship makes business sense.

As competition for contributed dollars becomes increasingly fierce, cultural organizations must better articulate the business benefits of sponsorship to corporate funders. When approaching potential sponsors, organizations can assert that cultural consumers feel positively about corporations who sponsor culture: 51% say they feel good about doing business with corporations that support cultural organizations, 36% say they're more likely to buy from those corporations, and 34% say they're more likely to listen to their message.



7

Conclusion: Five Key Takeaways

1 Purpose

Canadians are cultural omnivores, and their relationship with culture is purpose-driven. Specifically, they value experiences that ultimately nurture belonging, empathy, and perspective.

2 Relevance

While fun, novelty and escape are desired attributes of a cultural experience, relevance is a precondition for success. Audiences won't consider participating if they don't feel connected to the content or experience.

3 Connection

Audiences have limited experience with tech in cultural settings, and are divided on whether it should even have a role. The opportunity ahead is to reframe digital as a tool to foster deeper connection, rather than a solution unto itself.

4 Relationships

A fundamental shift has occurred in what individuals seek in committing to organizations: they now value empathy and reciprocity. This new relationship-based approach is replacing transactional models.

5 Impact

Canadians are philanthropically active, but culture is rarely their top priority. To generate increased support, a greater emphasis must be placed on culture's distinctive social impact, as well as the need for non-governmental funding.