

# CULTURE TRACK

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## CANADA

[www.CultureTrack.com](http://www.CultureTrack.com)

@CultureTrack

#CultureTrackCanada

## Business / Arts

LaPlaca  
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 NANOS

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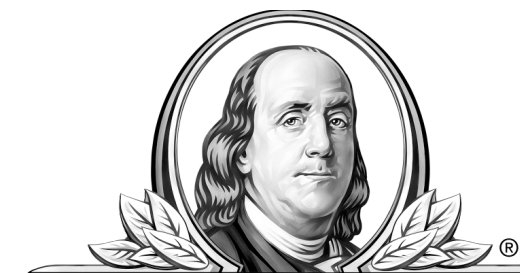
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# **Canadian Art Summit Delegate Contributors:**

Aga Khan Museum  
Art Gallery of Ontario  
Arts Commons  
artsUmbrella  
Banff Centre  
Calgary Opera  
Canadian Human Rights Museum  
Canadian Museum of History  
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Citadel Theatre  
City of Vancouver Cultural Services  
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Grand Theatre  
Harbourfront Centre

Les Grands Ballets Canadiens  
Luminato Festival  
Massey Hall & Roy Thomson Hall  
McMichael Canadian Art Collection  
National Arts Centre  
National Ballet of Canada  
Royal Manitoba Theatre Company  
Royal Winnipeg Ballet  
Shaw Festival  
Soulpepper Theatre Company  
Stratford Festival  
Theatre Calgary  
Toronto International Film Festival  
Vancouver Opera



# About Culture Track: Canada





**Culture Track is a national survey of cultural consumers' attitudes, motivators, and barriers to participation.**

**2018 marks the first year for the Canadian study, setting an important baseline for the future.**





**Bilingual, online survey of**

**6,444**

**cultural consumers across the country**



# Respondents by Province\*

1,012

Ontario

1,011

Québec

1,009

British Columbia

1,004

Alberta

402

Nova Scotia

402

New Brunswick

402

Newfoundland  
and Labrador

401

Manitoba

401

Saskatchewan

400

Prince Edward  
Island

**\*Weighted to true  
population proportion.**

# Culture Track

67%  
Anglophone

20%  
Francophone

13%  
Allophone

# Cdn Population

68%  
Anglophone

20%  
Francophone

12%  
Allophone

2

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# The Canadian Cultural Landscape

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**Canadian audiences are true  
cultural omnivores.**





Historic  
Attractions



Art Museums



Community  
Festivals



Ballet



Comedy Shows



Food and Drink  
Experiences



Natural History  
Museums



Music Festivals



Opera



Public Art



Classical Music



Plays



**Although audiences are open to all types of activities, their participation is lower for the “benchmark arts.”**





Historic  
Attractions



Art Museums



Community  
Festivals



Ballet



Comedy Shows



Food and Drink  
Experiences



Natural History  
Museums



Music Festivals



Opera



Public Art



Classical Music



Plays





66%



33%



73%



21%



55%



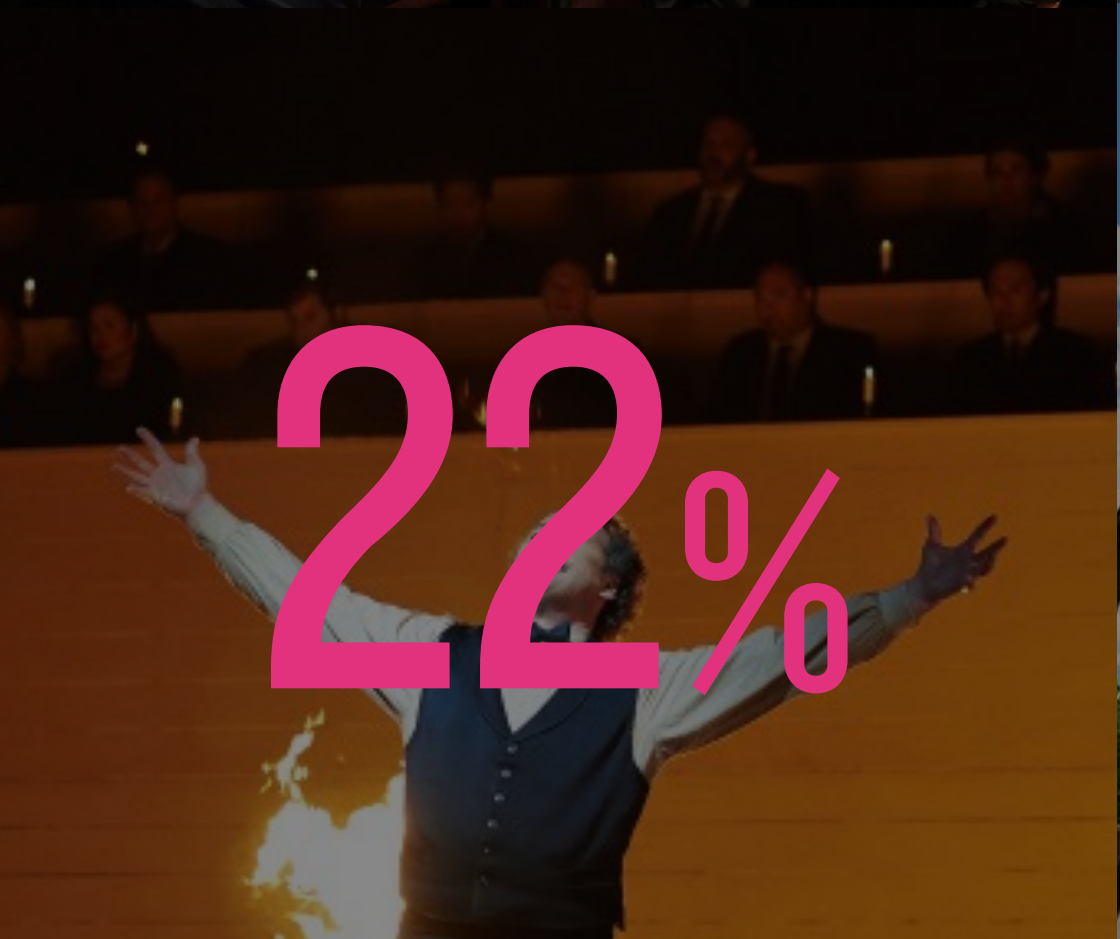
68%



52%



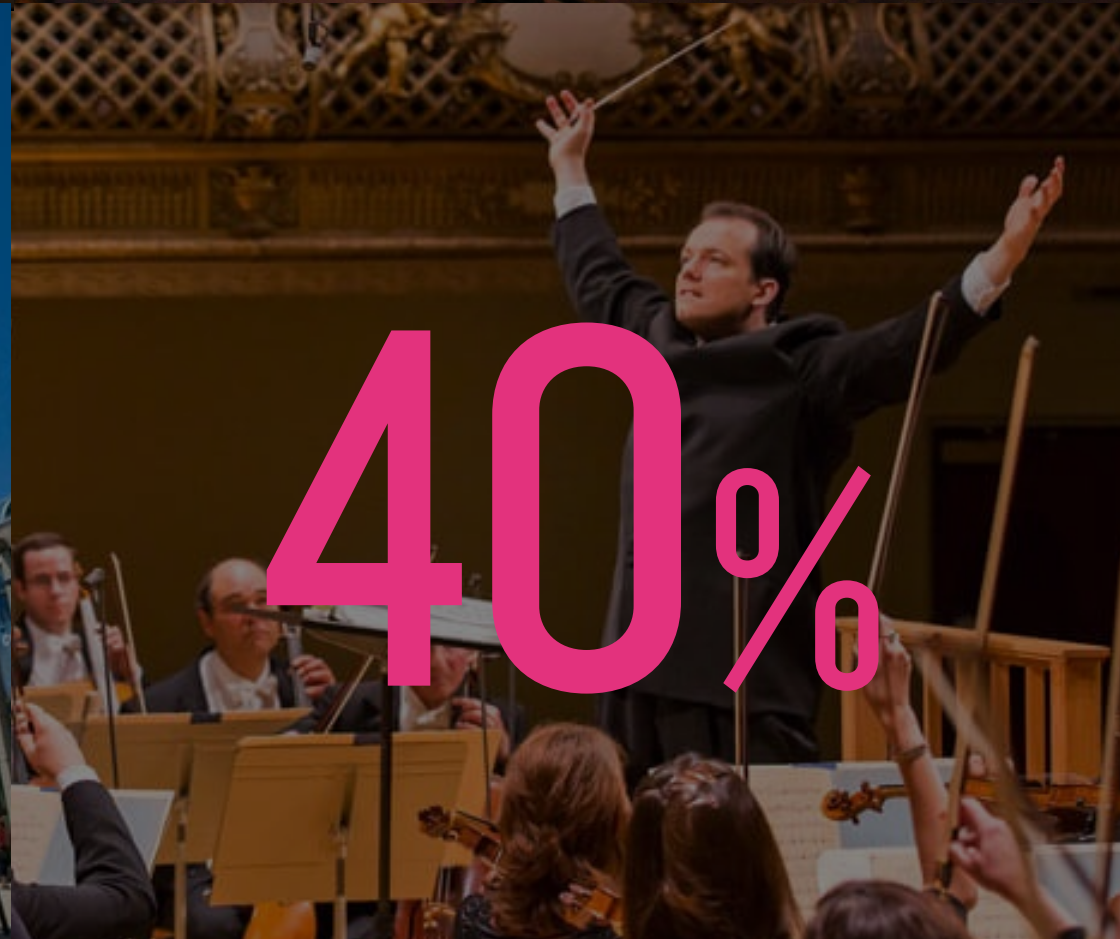
56%



22%



51%



40%



50%



# The most popular cultural activities center around three core principles:

- Community
- Connection
- Discovery





Historic  
Attractions



Art Museums



Community  
Festivals



Ballet



Comedy Shows



Food and Drink  
Experiences



Natural History  
Museums



Music Festivals



Opera



Public Art

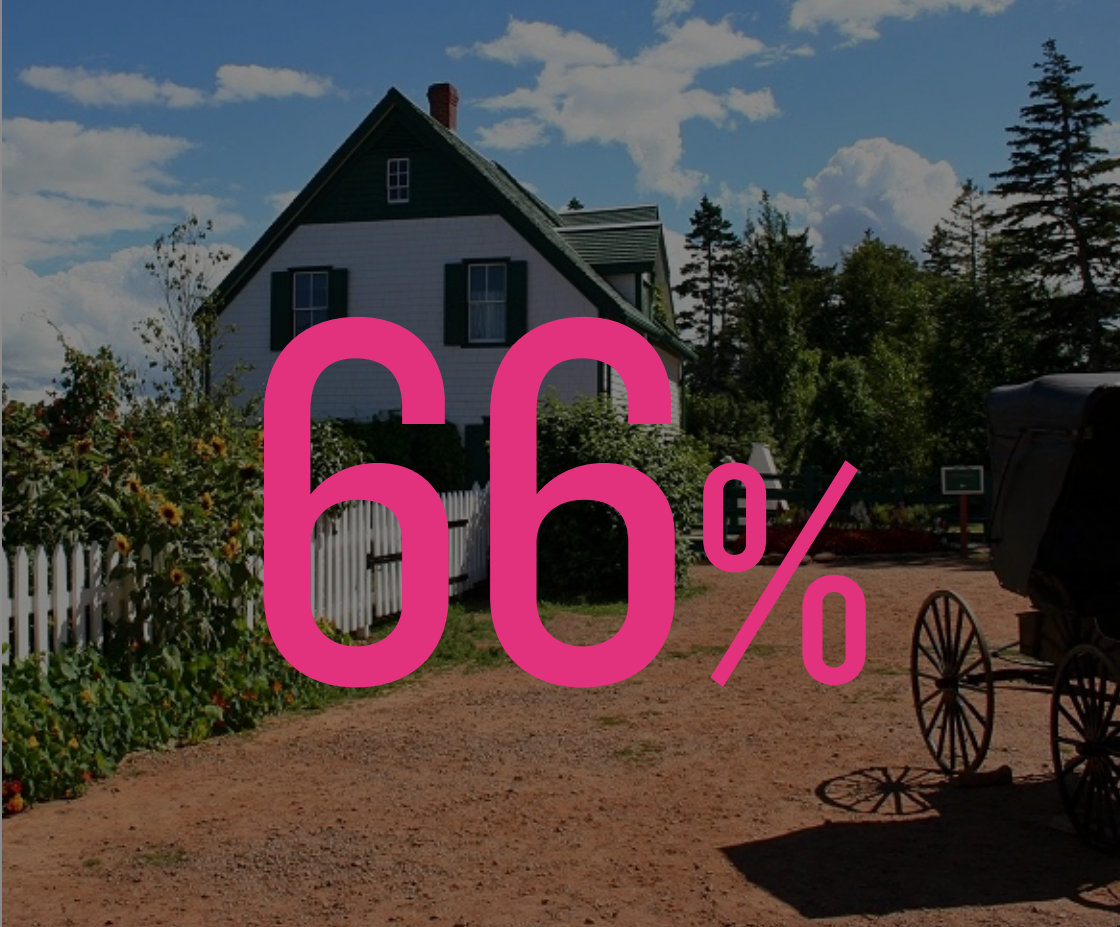


Classical Music



Plays





66%



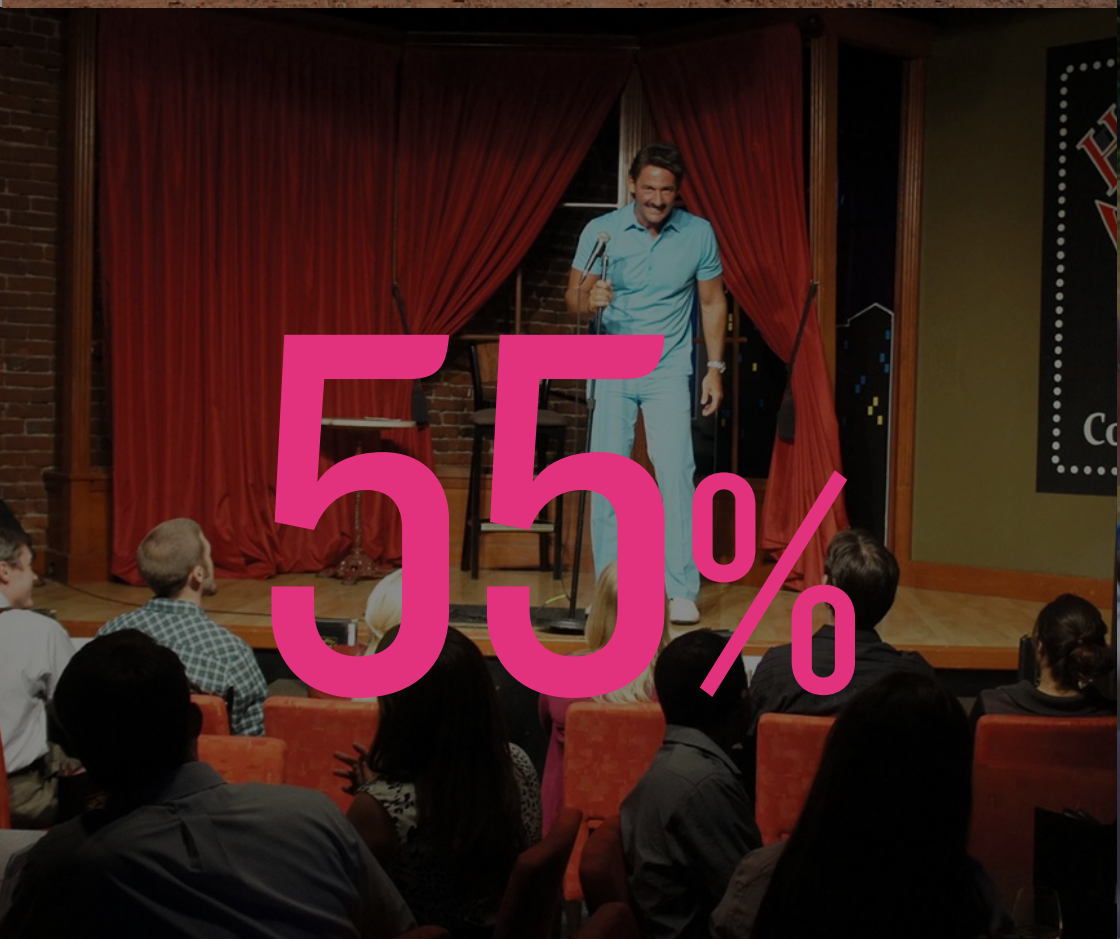
33%



73%



21%



55%



68%



52%



56%



22%



51%



40%



50%



**These three principles also align with audiences' understanding of culture's greatest possible impact.**

# Community → Belonging

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



# Connection → Empathy

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

# Discovery → Perspective

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

3

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# Today's Cultural Consumer

# **Today's audience attitudes:**

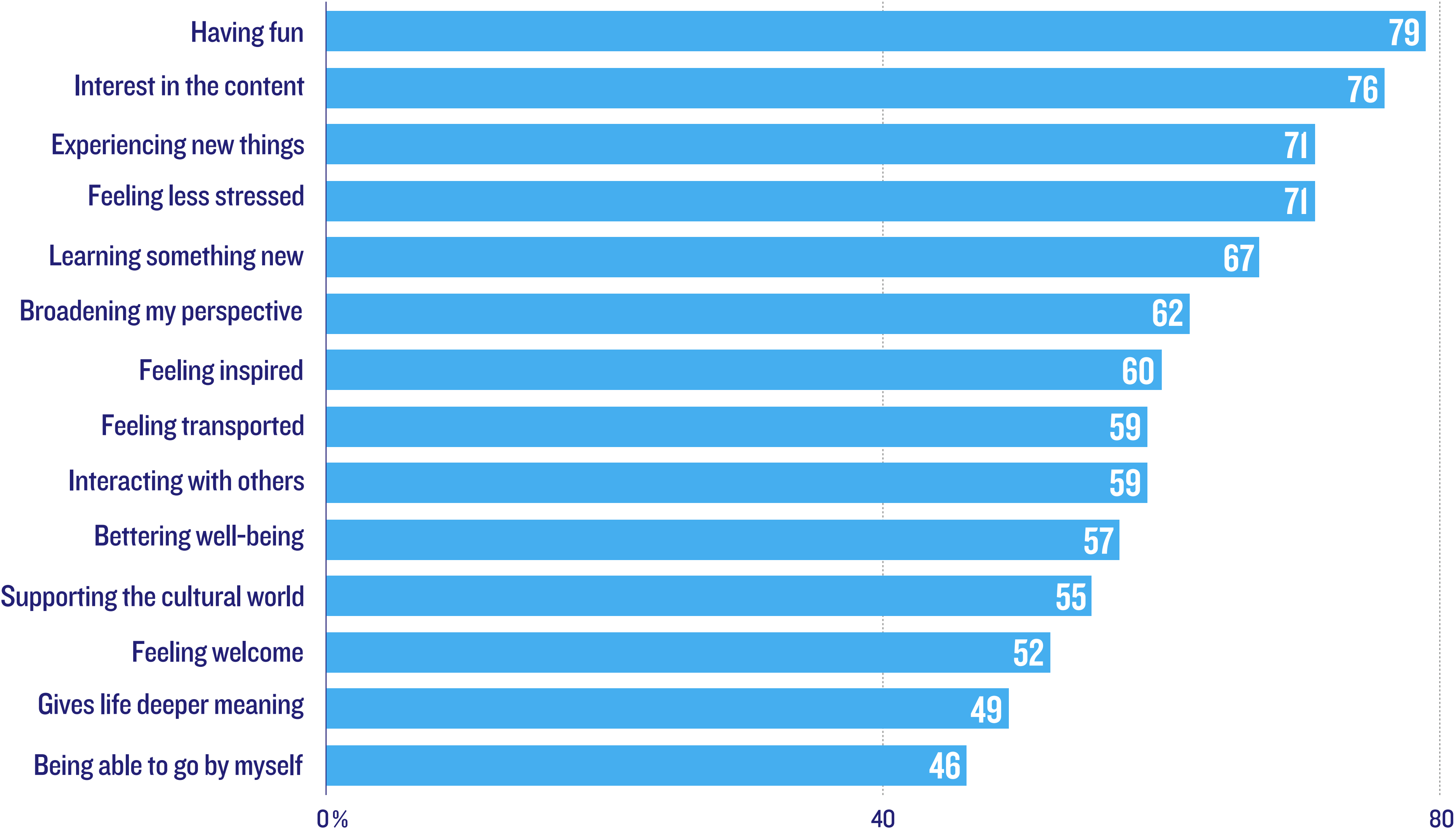
- What is the mindset of Canadian cultural consumers?**
- Why do they engage with culture in the first place?**
- What causes them to stay away?**

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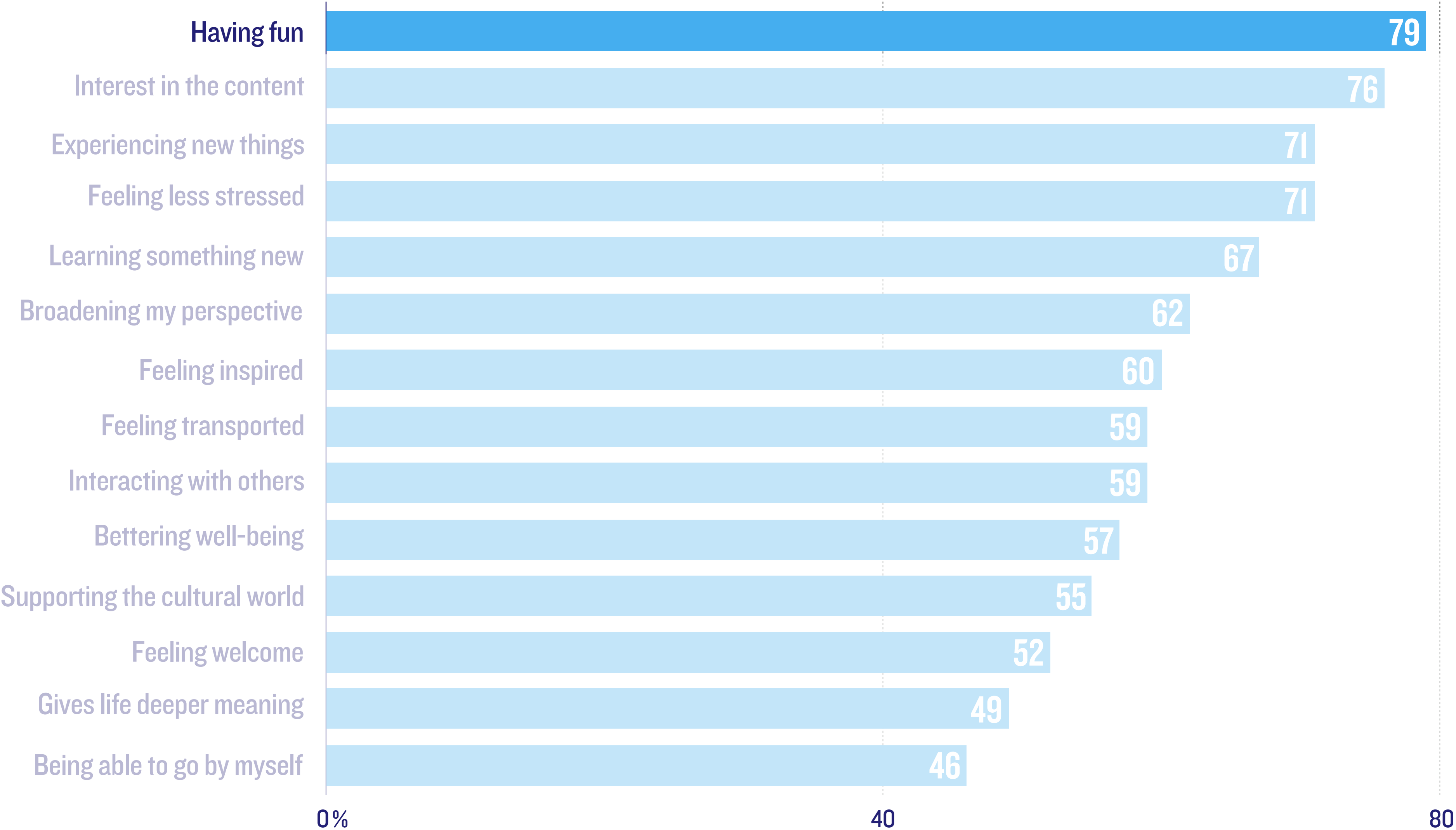
**The single greatest motivator:**

**Having fun.**

# Motivators For Cultural Participation



# Motivators For Cultural Participation



**But what does “having fun” actually mean to audiences, and for the cultural organizations that serve them?**



# Characteristics of an Ideal Cultural Activity

**1. Social**

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**2. Lively**

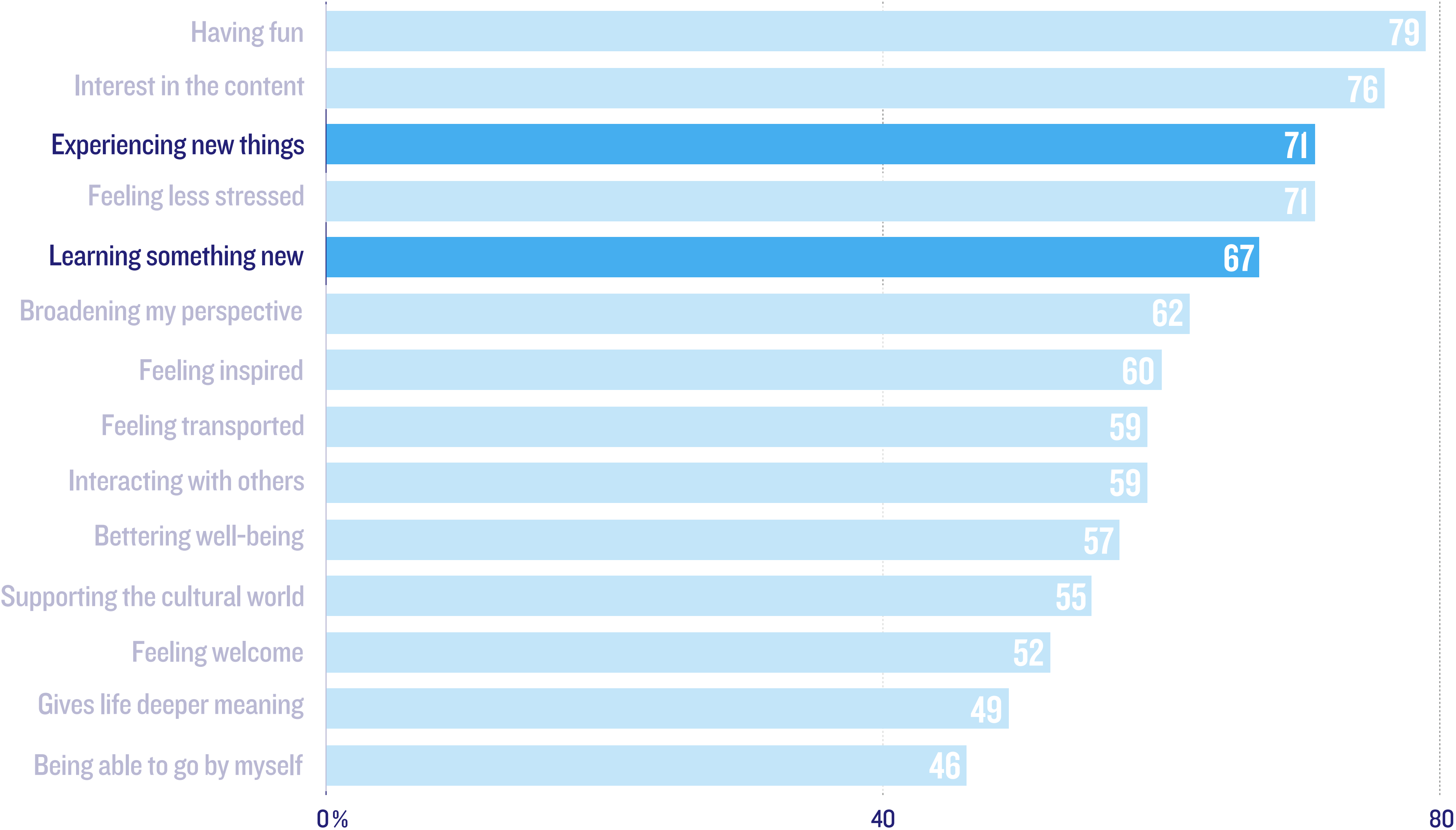
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**3. Interactive**

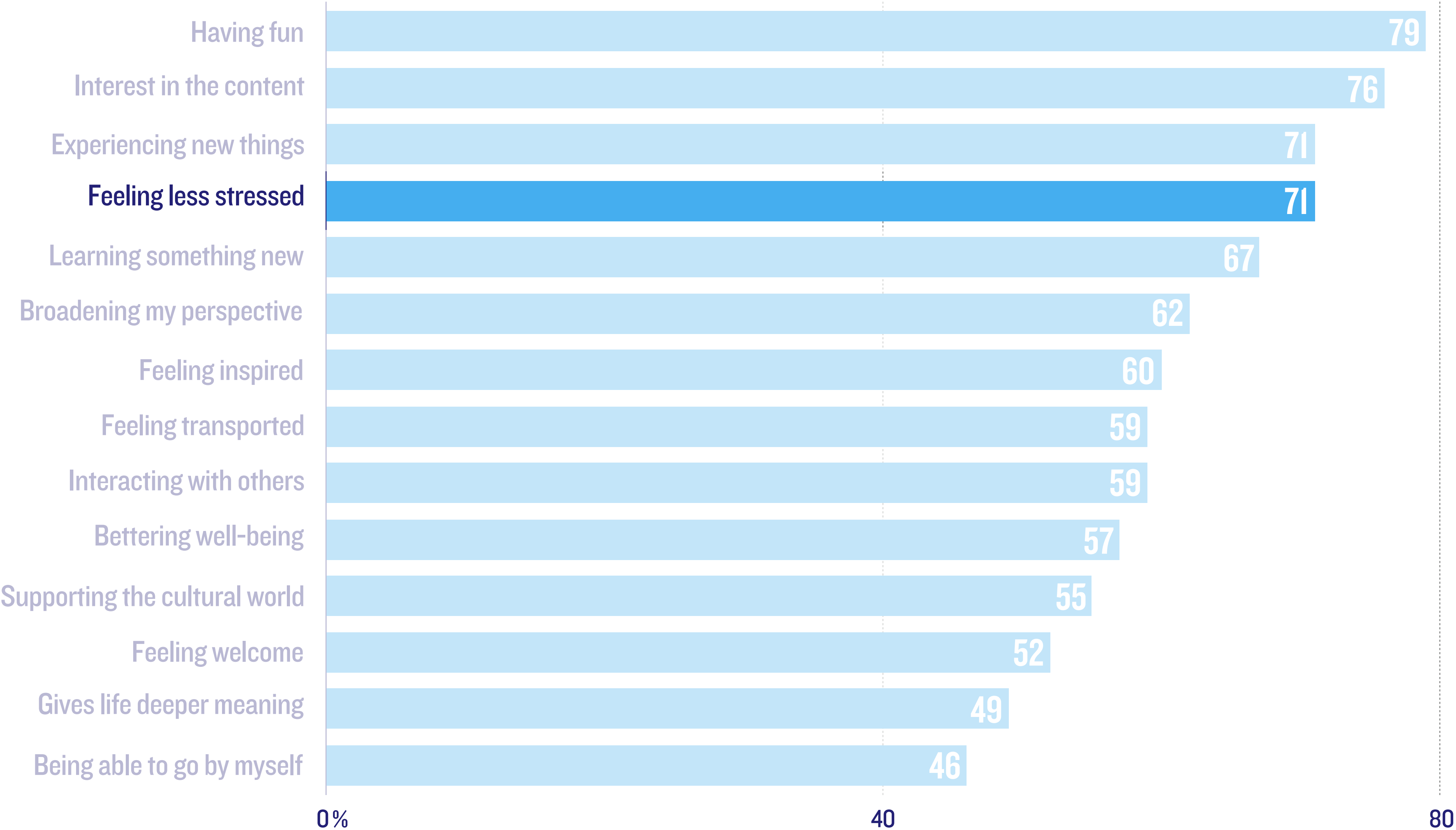
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**Beyond “fun,” there are a number of other motivators that are critical to cultural participation.**

# Motivators For Cultural Participation



# Motivators For Cultural Participation



**When it comes to understanding why culture can drive audiences away, personal relevance is critical.**

# 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**



# Today's Cultural Consumer

# Spotlight Stats



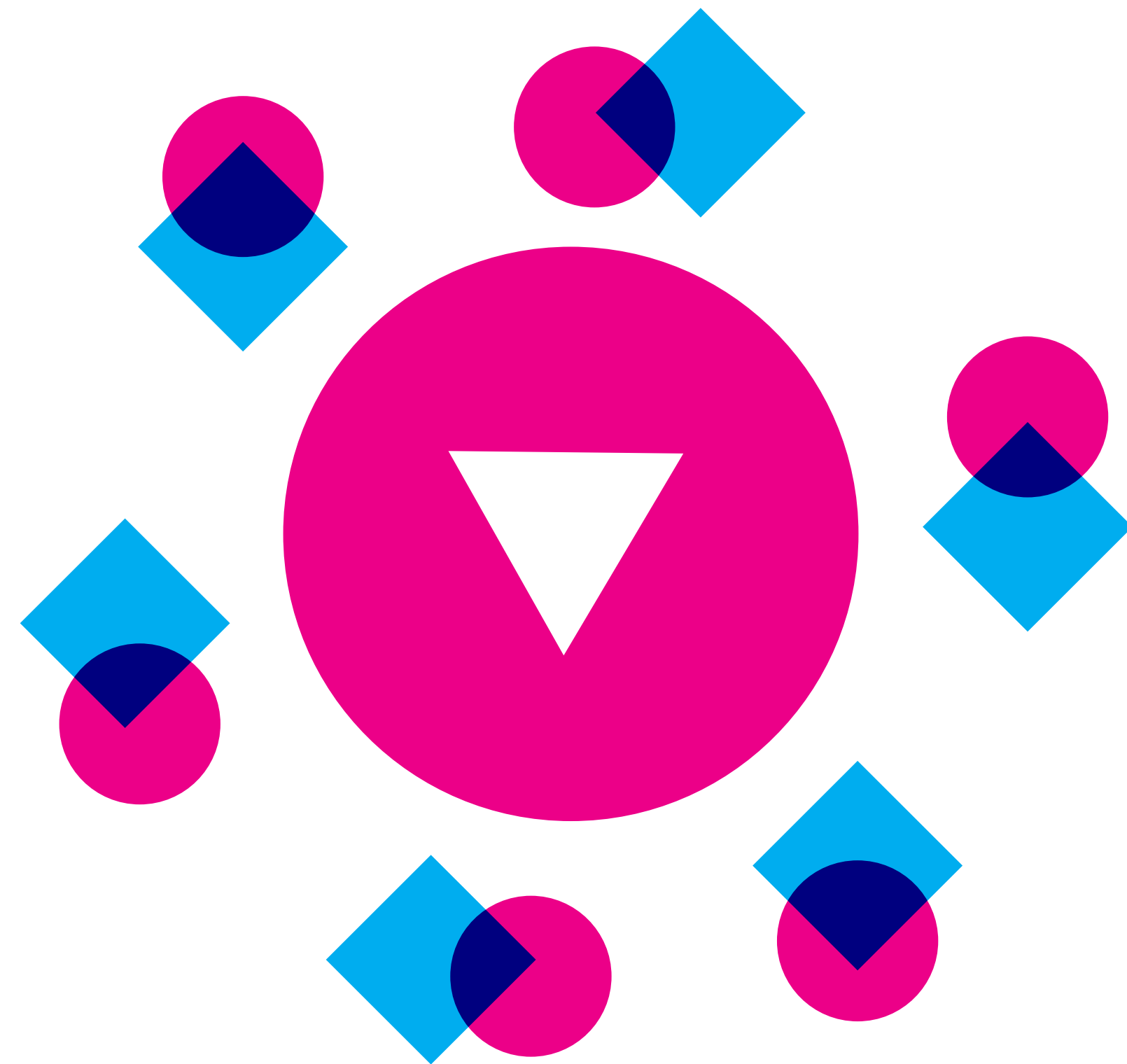


# Representation matters.

Indigenous peoples and  
people of colour are

65%

more likely to stay  
away because activities  
don't reflect people  
of a range of backgrounds.



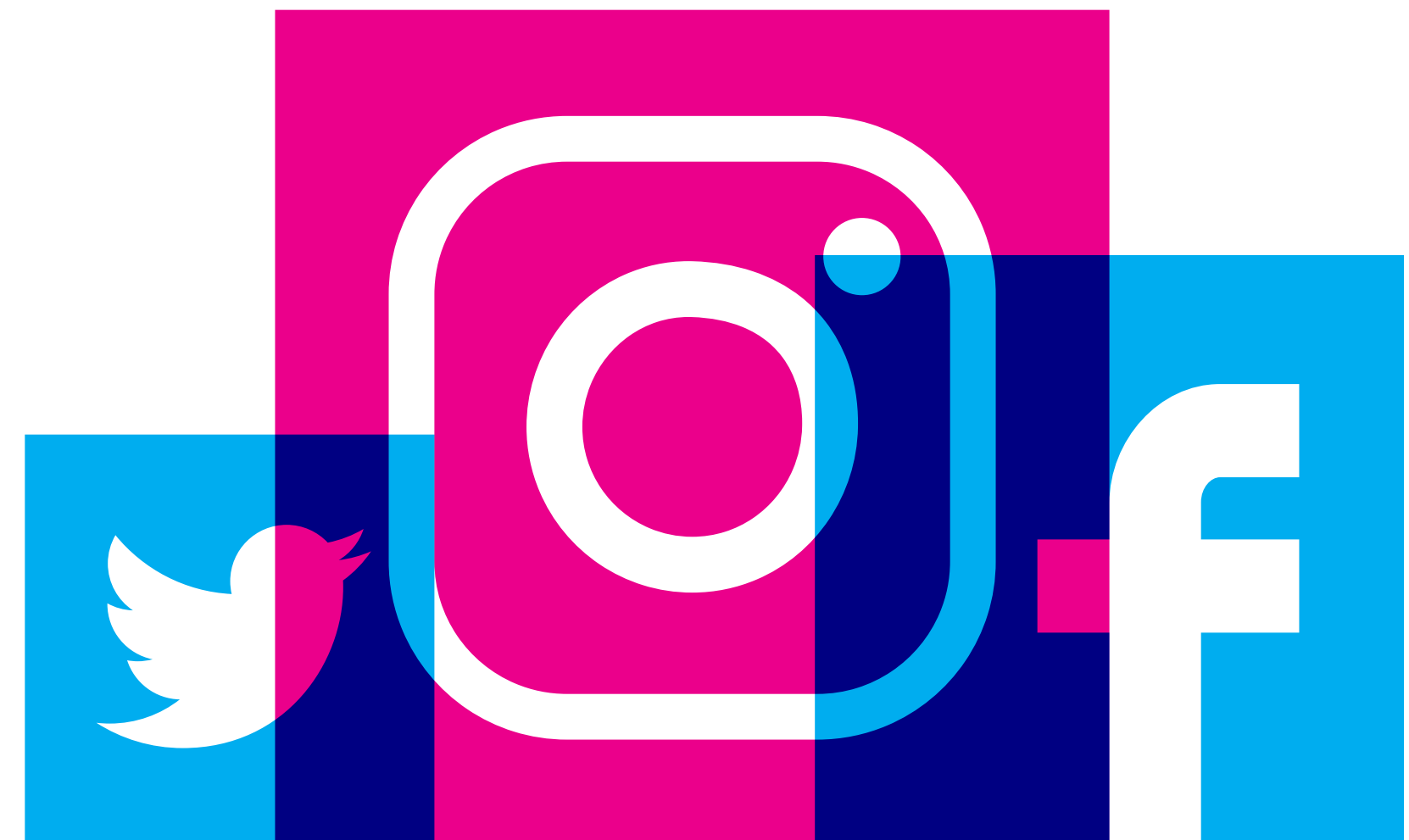


# To reach younger generations, meet them where they live.

For **Millennials**,  
social media ads are the

#1

most influential type  
of marketing for  
cultural activities.



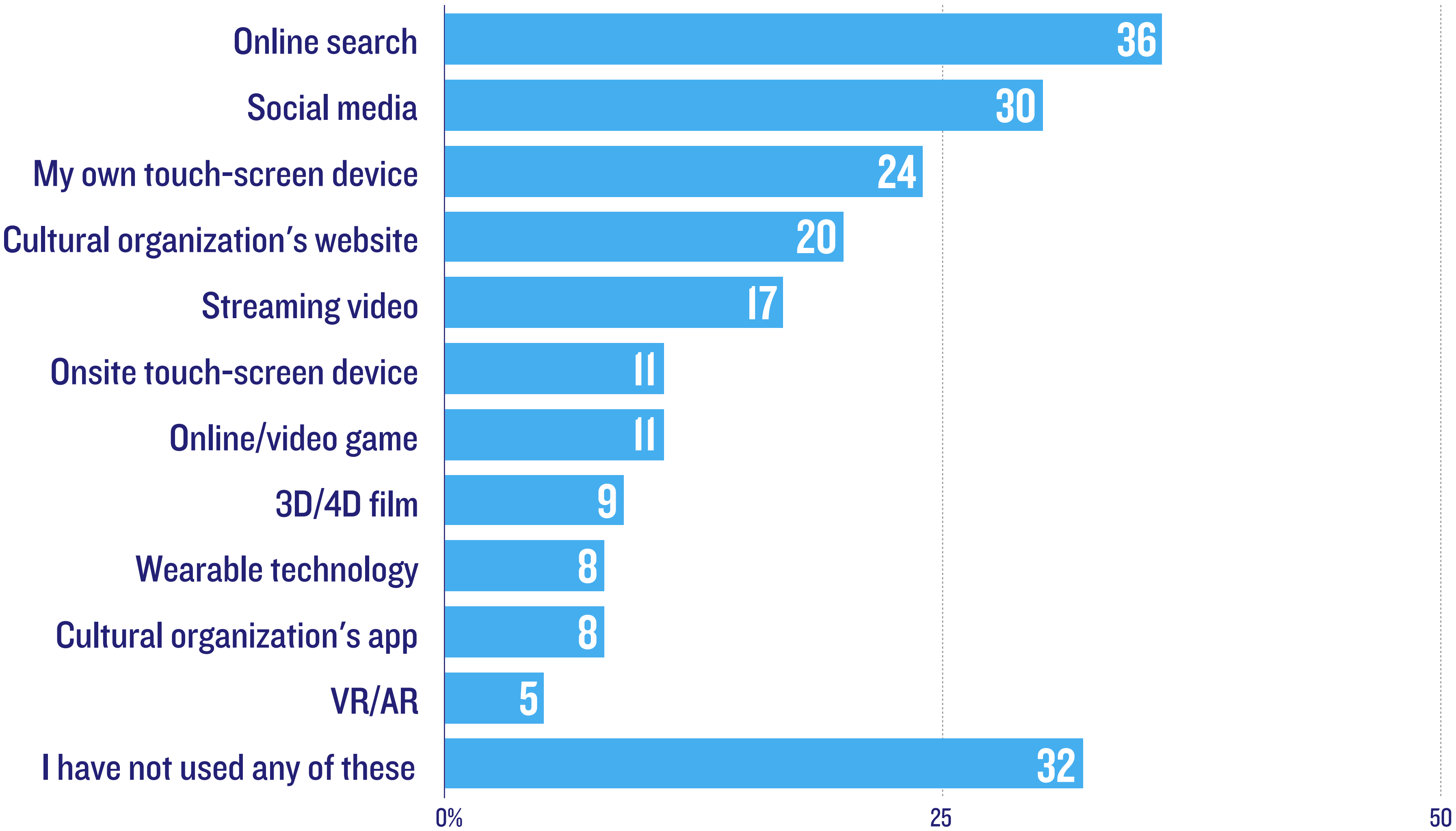
4

# The Tech Lag

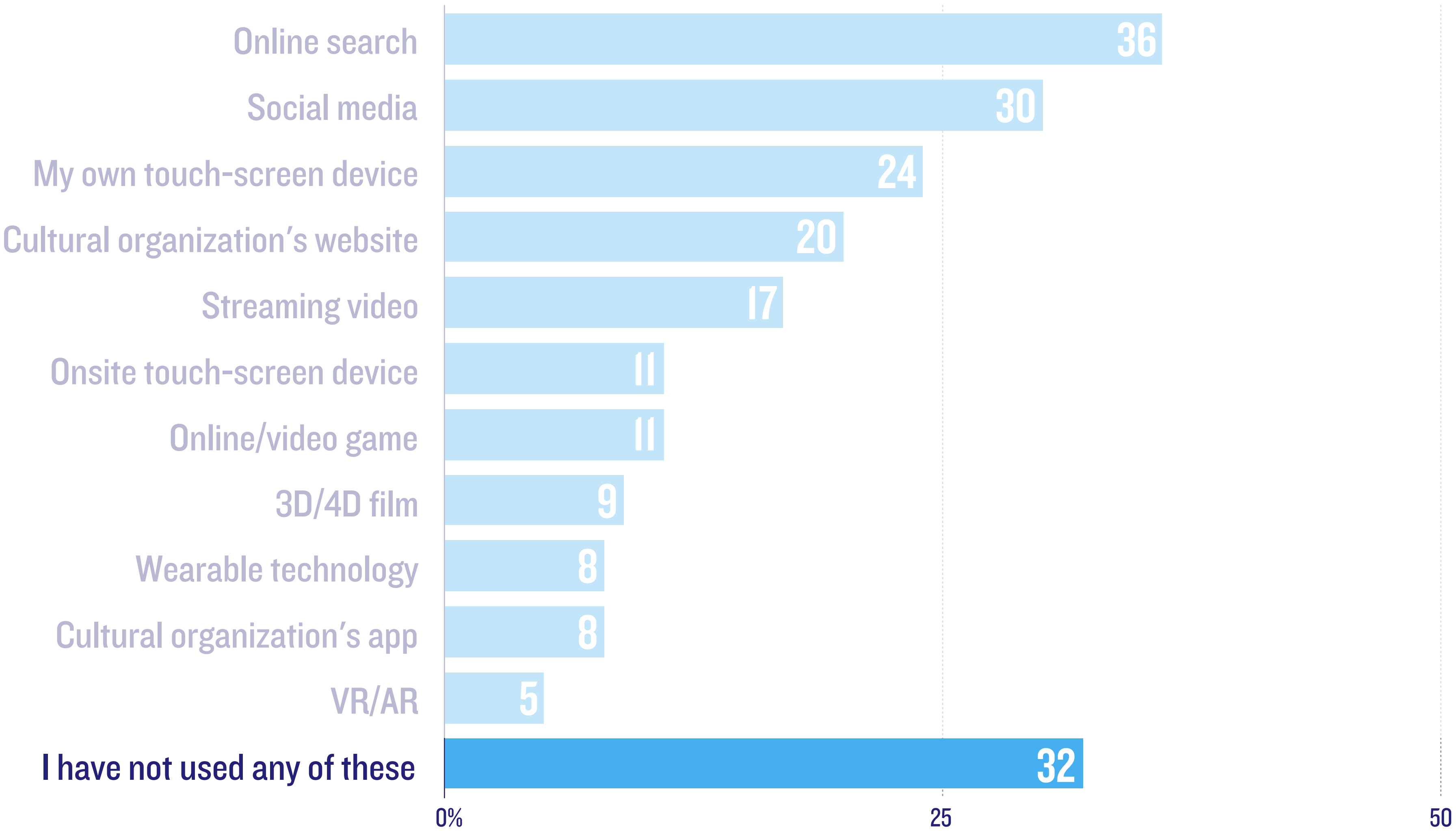
**Digital technology has fundamentally revolutionized how people engage with nearly every aspect of daily life.**

**However, audiences have yet to truly embrace technology as an integral part of the cultural experience.**

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



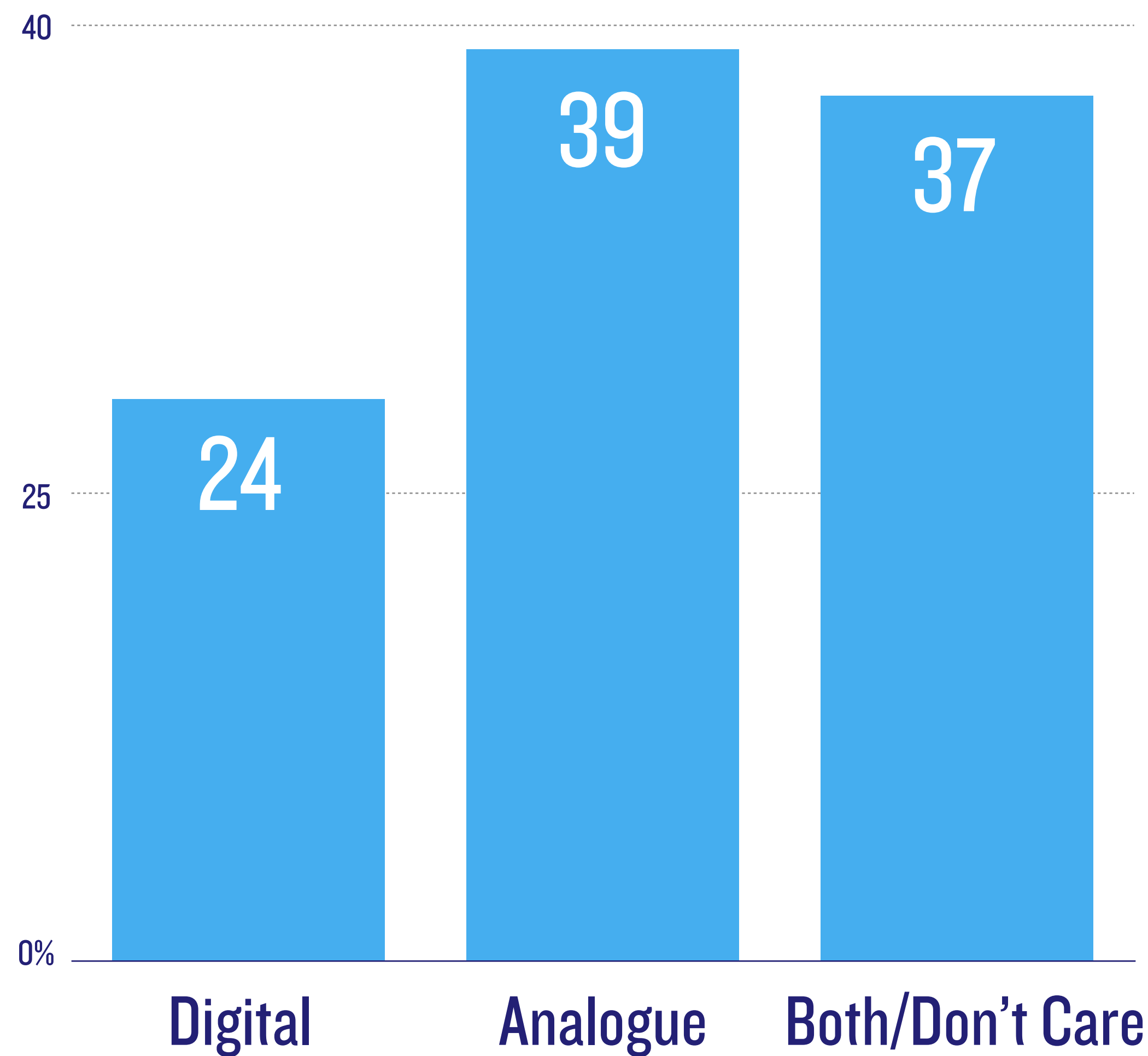
# Use of Technology in the Past Year as Part of Cultural Activity



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**Audiences are divided on how—and whether—technology should play a role in the cultural experience.**

# Desire for Digital or Analogue Cultural Activities





# Top Reasons Why Digital Appeals in Cultural Activities

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

# Top Reasons Why Analogue Appeals in Cultural Activities

**1. Feels more authentic**

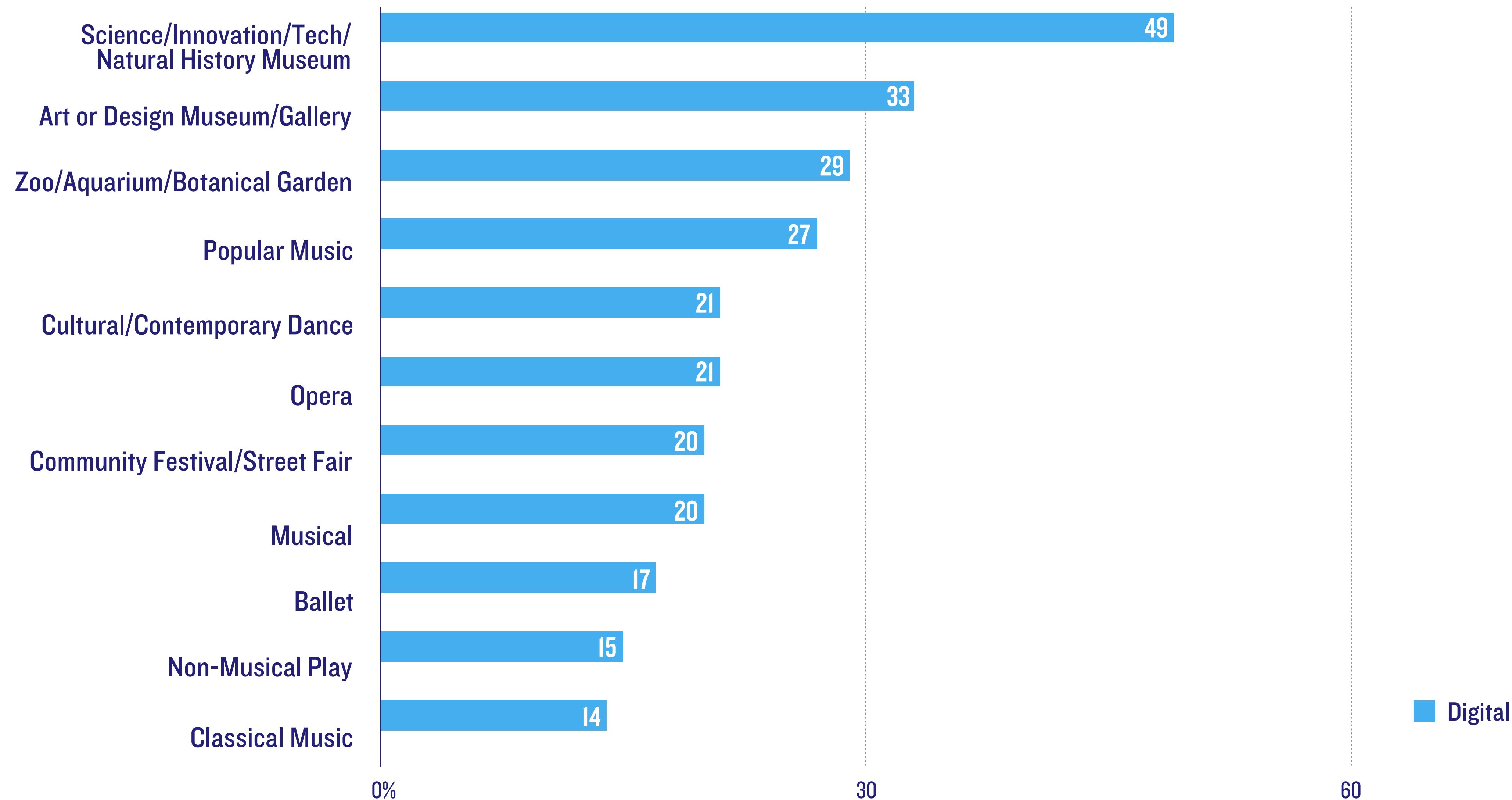
**2. More focus on the activity**

**3. More enjoyable**

**4. Is simpler**

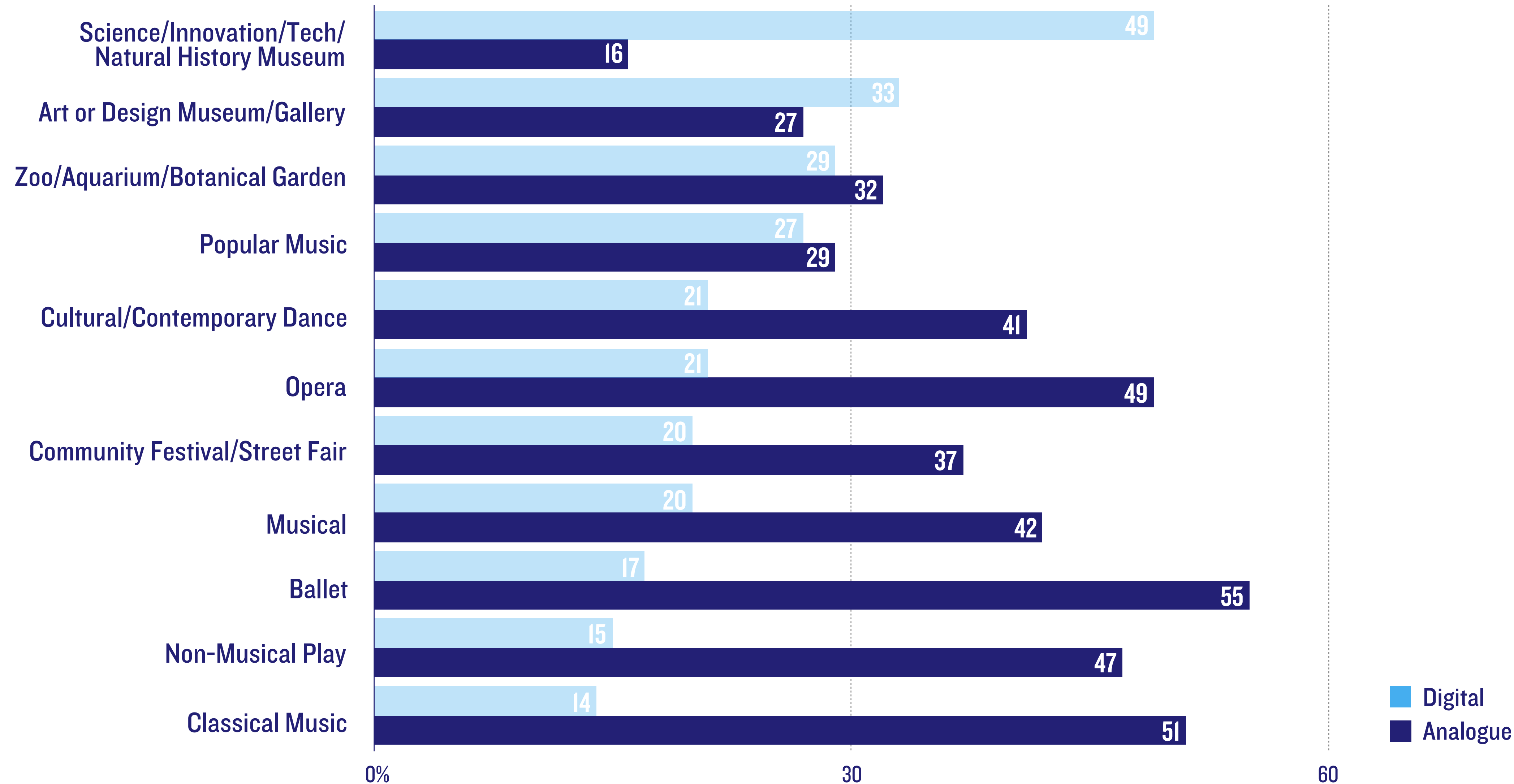
**These opinions also vary greatly  
across cultural activities.**

# Interest in Digital or Analogue as Part of Cultural Activity





# Interest in Digital or Analogue as Part of Cultural Activity



# Considerations for digital:

- Does it enrich or distract?
- Does it simplify the experience, or add unnecessary complexity?
- Does it feel authentic?



# The Tech Lag

## Spotlight Stats





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

Audiences are nearly

5x

more likely to use  
**online search** over a  
cultural organization's app  
as part of the activity.



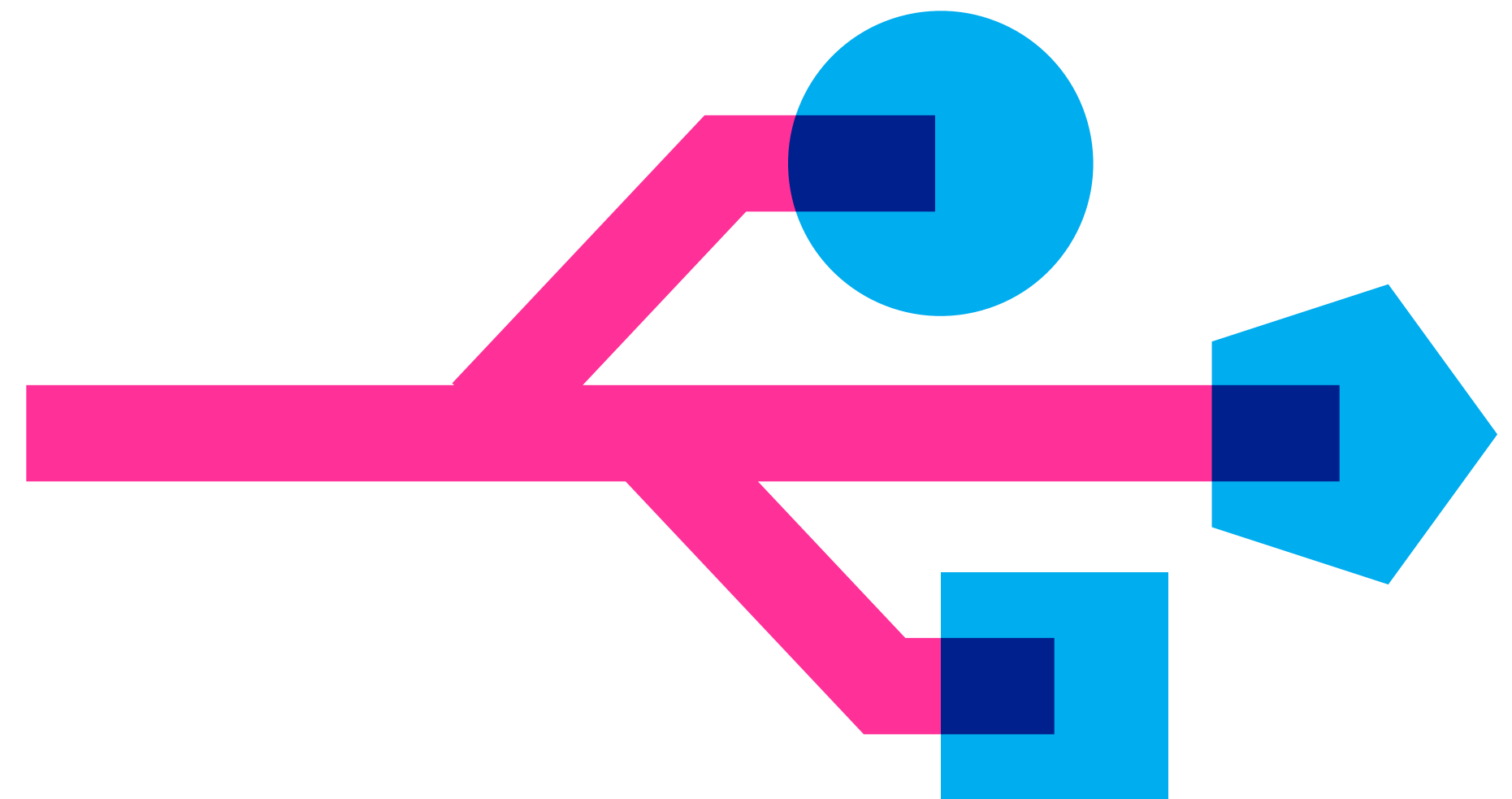
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# Digital tools can open the door for new audiences.

Indigenous peoples and people of colour are nearly

2x

more likely to want a digital or virtual component as part of their ideal cultural experience.



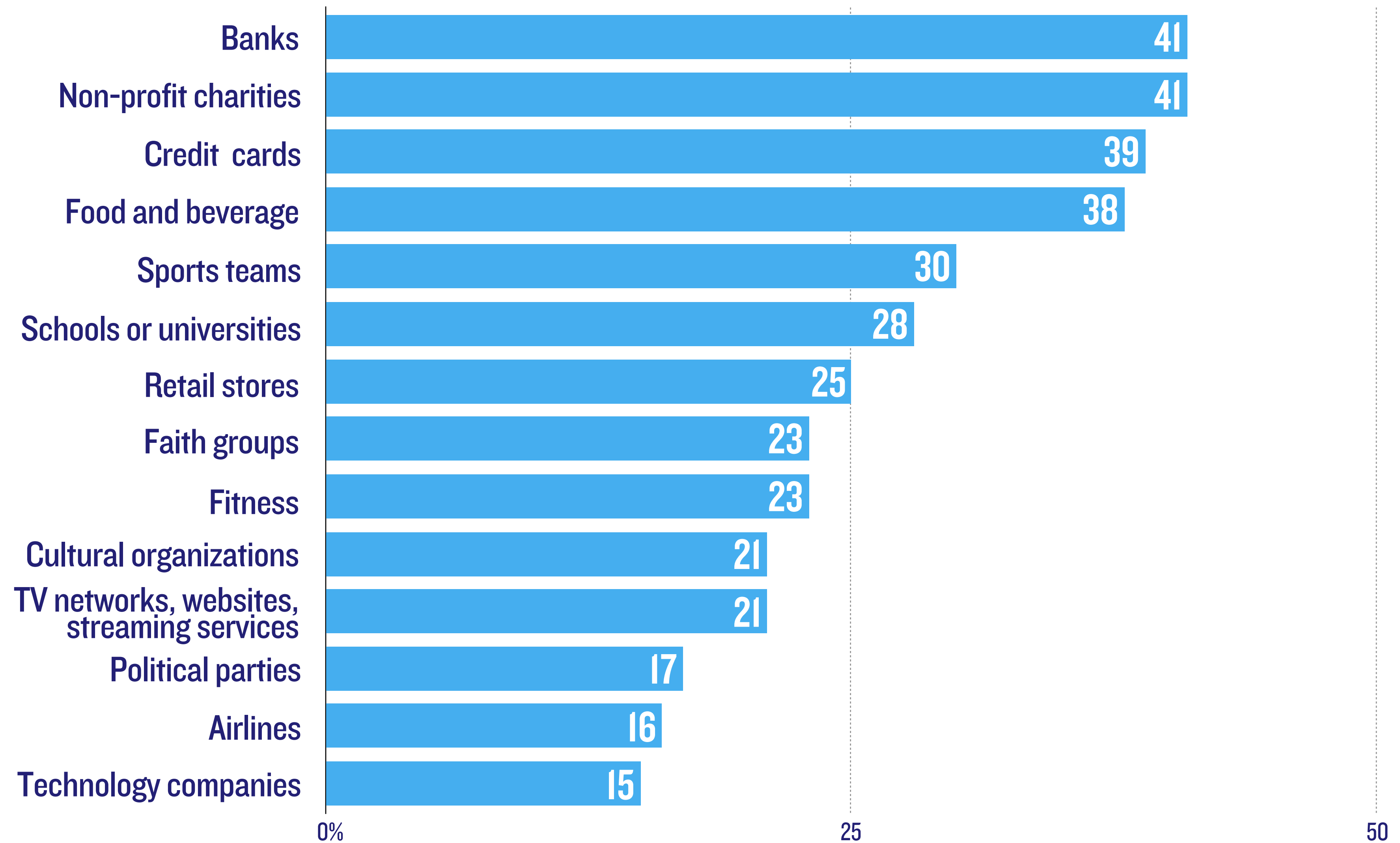


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# The Future of Affinity

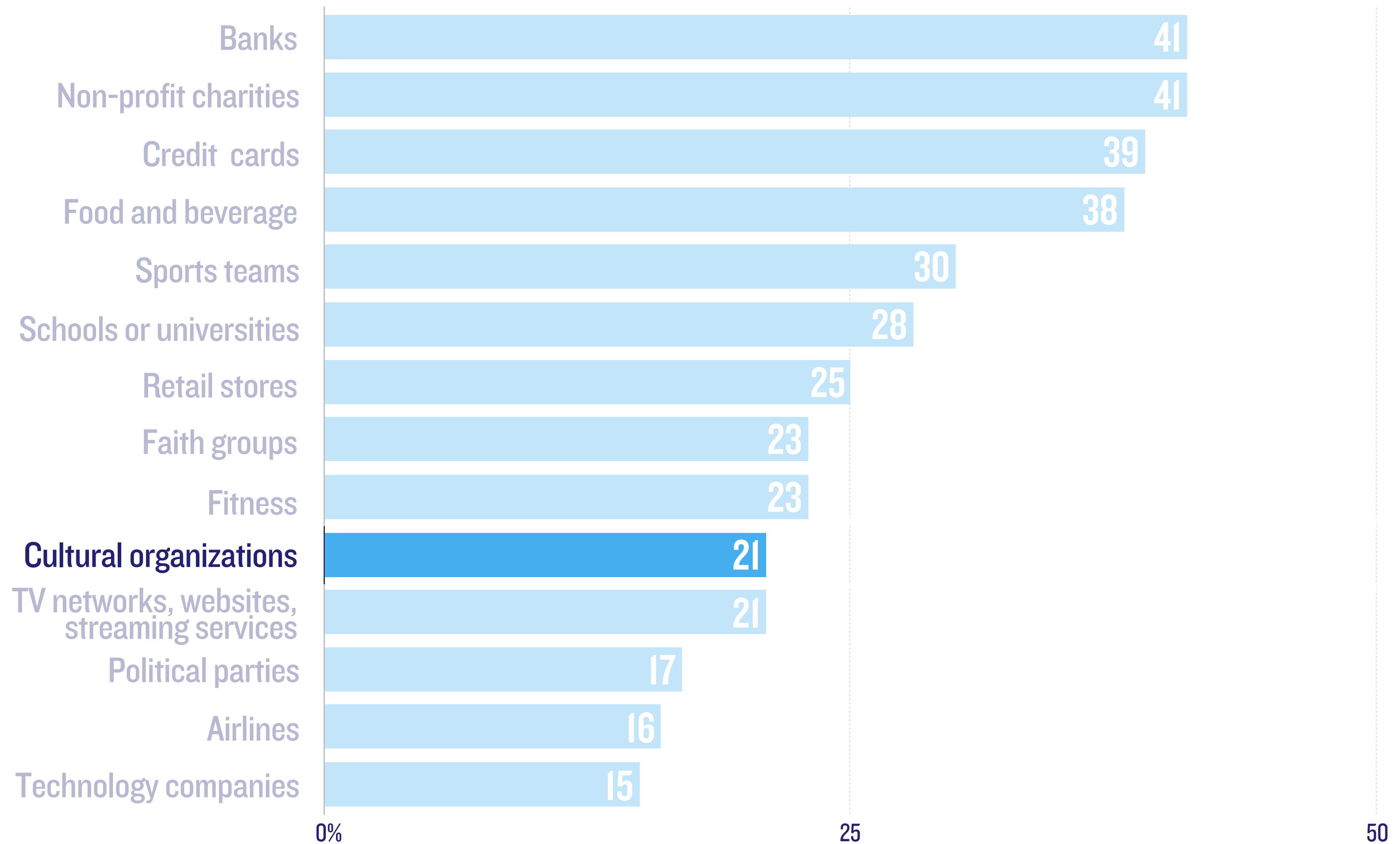
**Audiences demonstrate affinity to a wide range of companies and causes—yet culture is low on the list.**

# Audience Personal Commitments





# Audience Personal Commitments



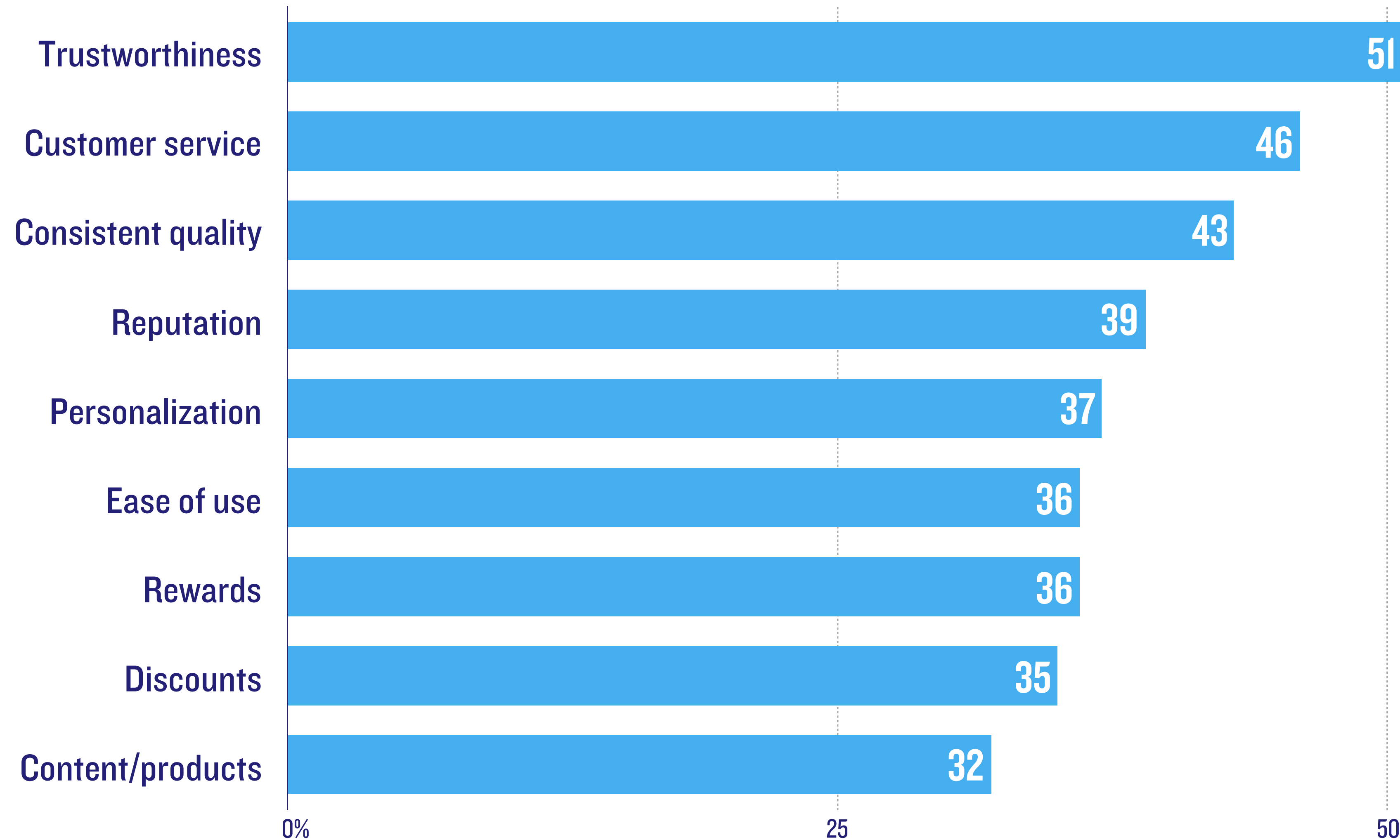
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**Like Americans, Canadian audiences  
view affinity as a personal relationship.**

**Their ideal partner is:**

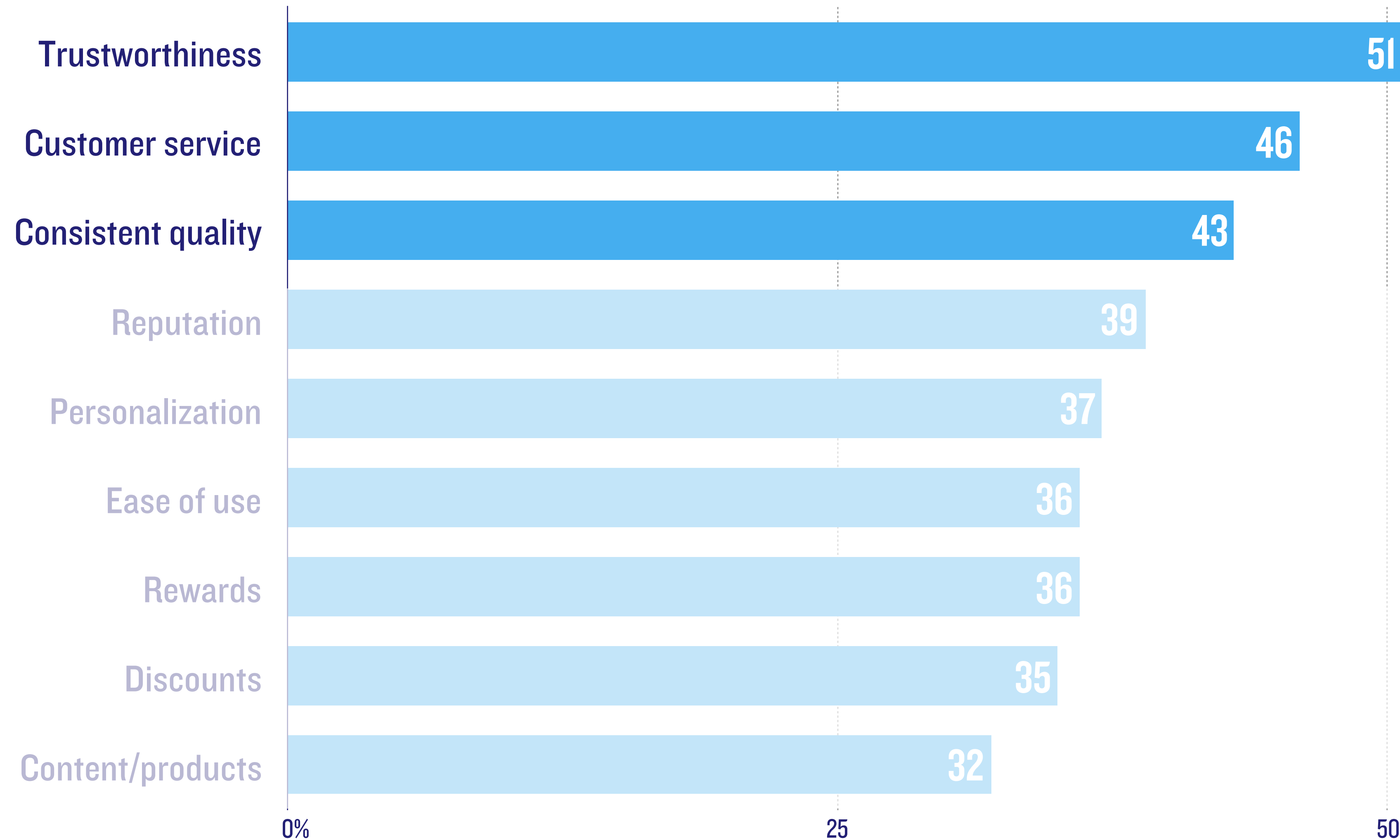
- trustworthy**
- kind**
- consistent**

# Motivators for Personal Commitment



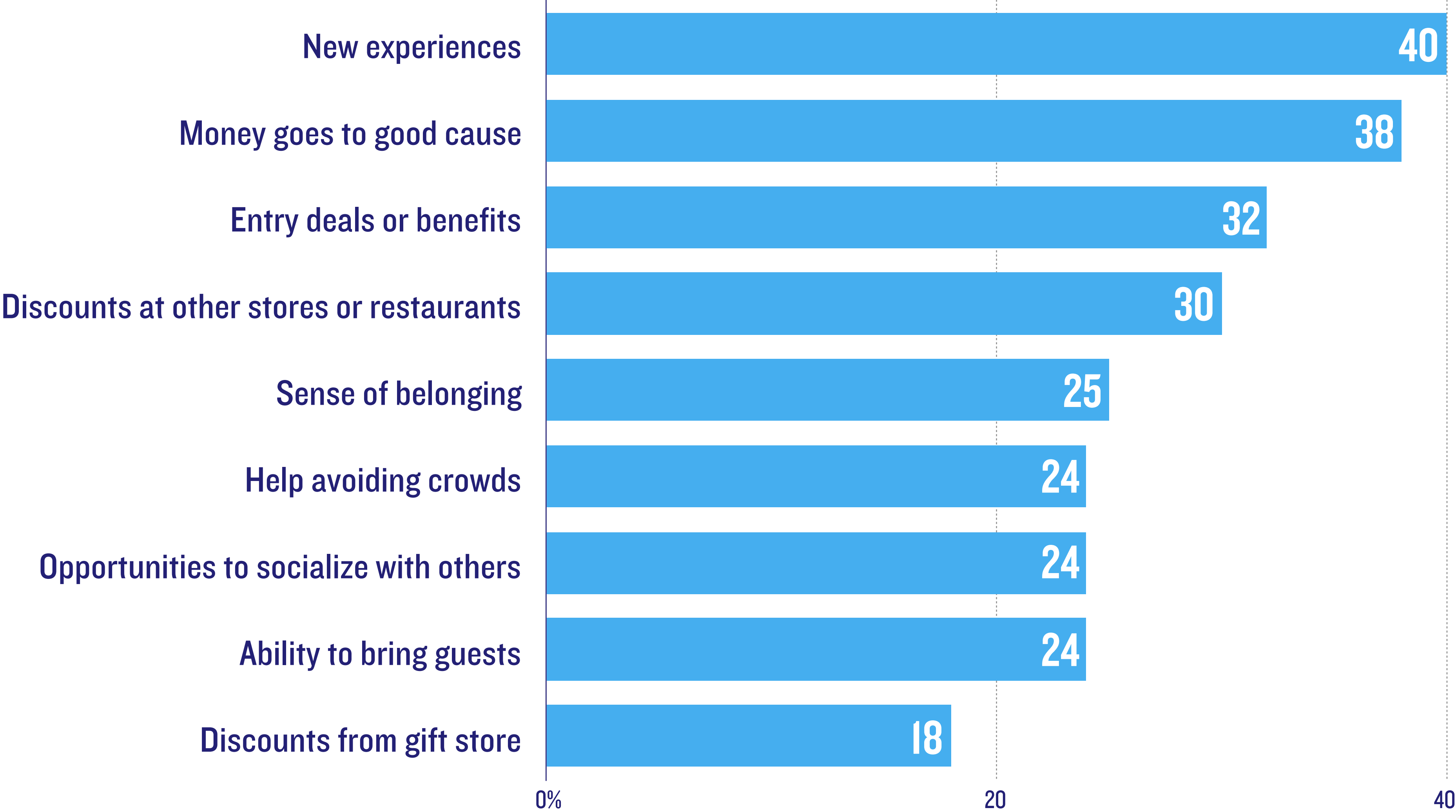


# Motivators for Personal Commitment

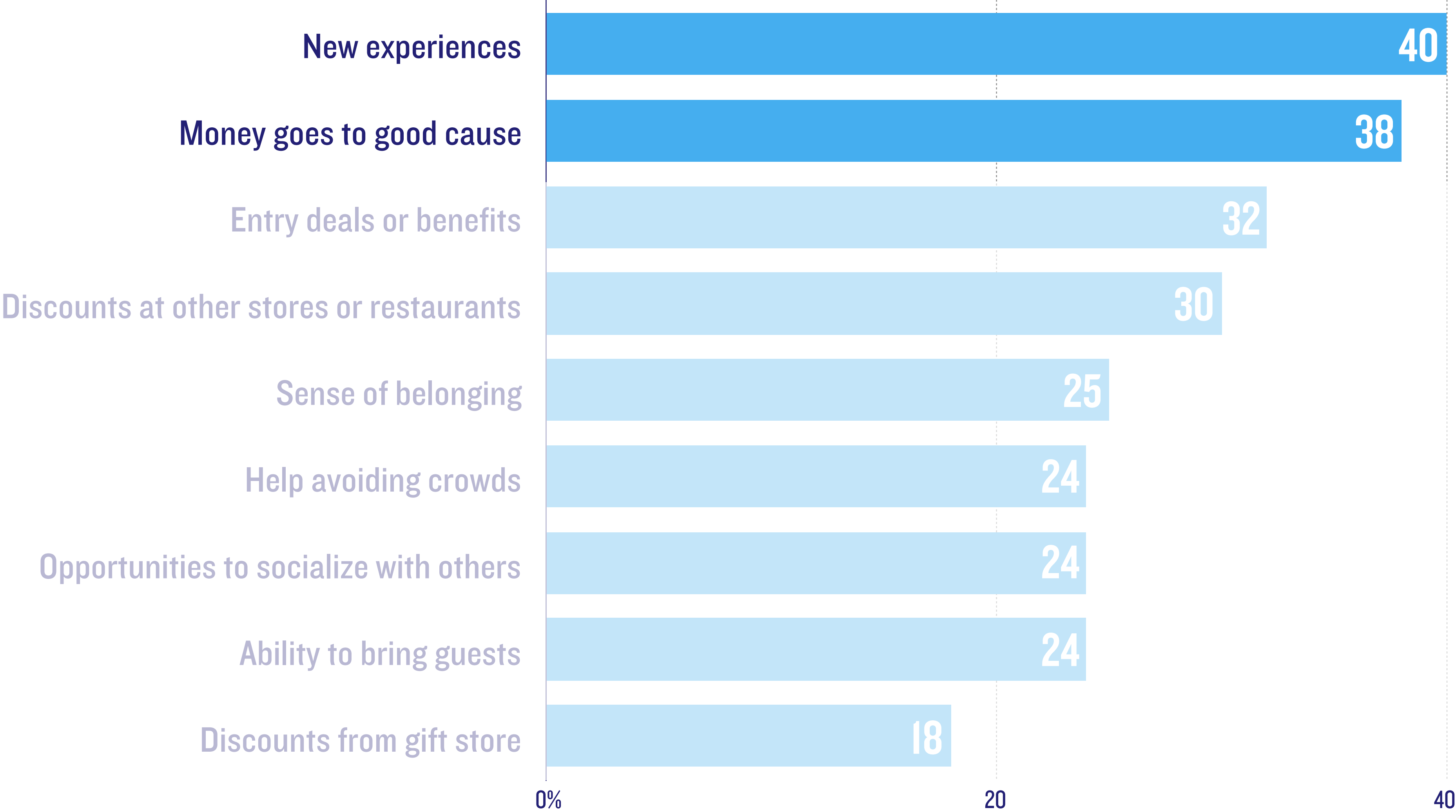


**When it comes to audiences' ideal cultural loyalty program, discounts and perks are less persuasive than novelty or mission.**

# Motivators for Joining a Cultural Loyalty Program



# Motivators for Joining a Cultural Loyalty Program





# The cultural loyalty program of the future will be:

- Based on relationships, not transactions
- Driven by new experiences
- Focused on impact



# The Future of Affinity

## Spotlight Stats



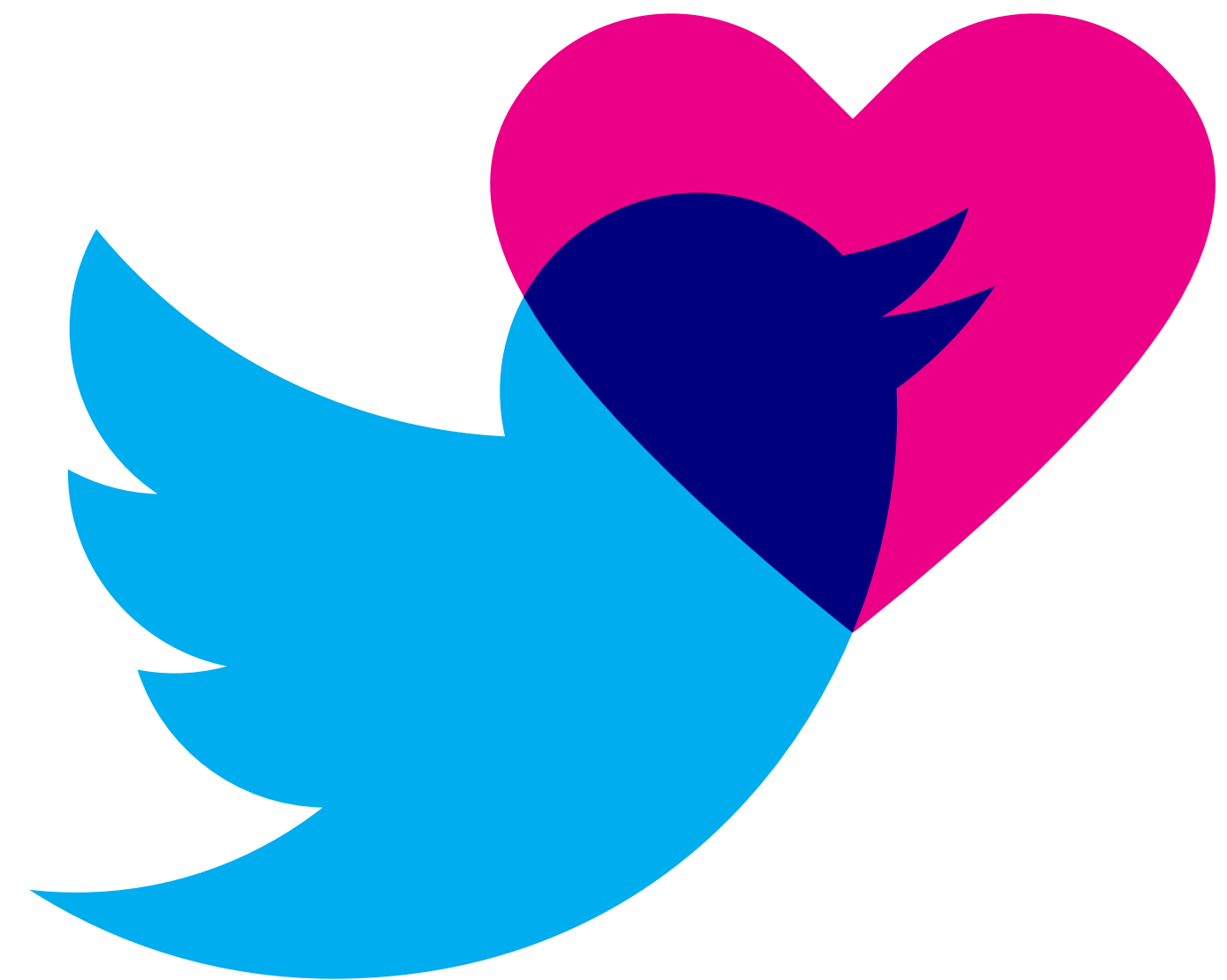


# For younger generations, a “like” goes a long way.

Those under 35 are almost

2x

more likely to show  
their support via a post  
on social media.

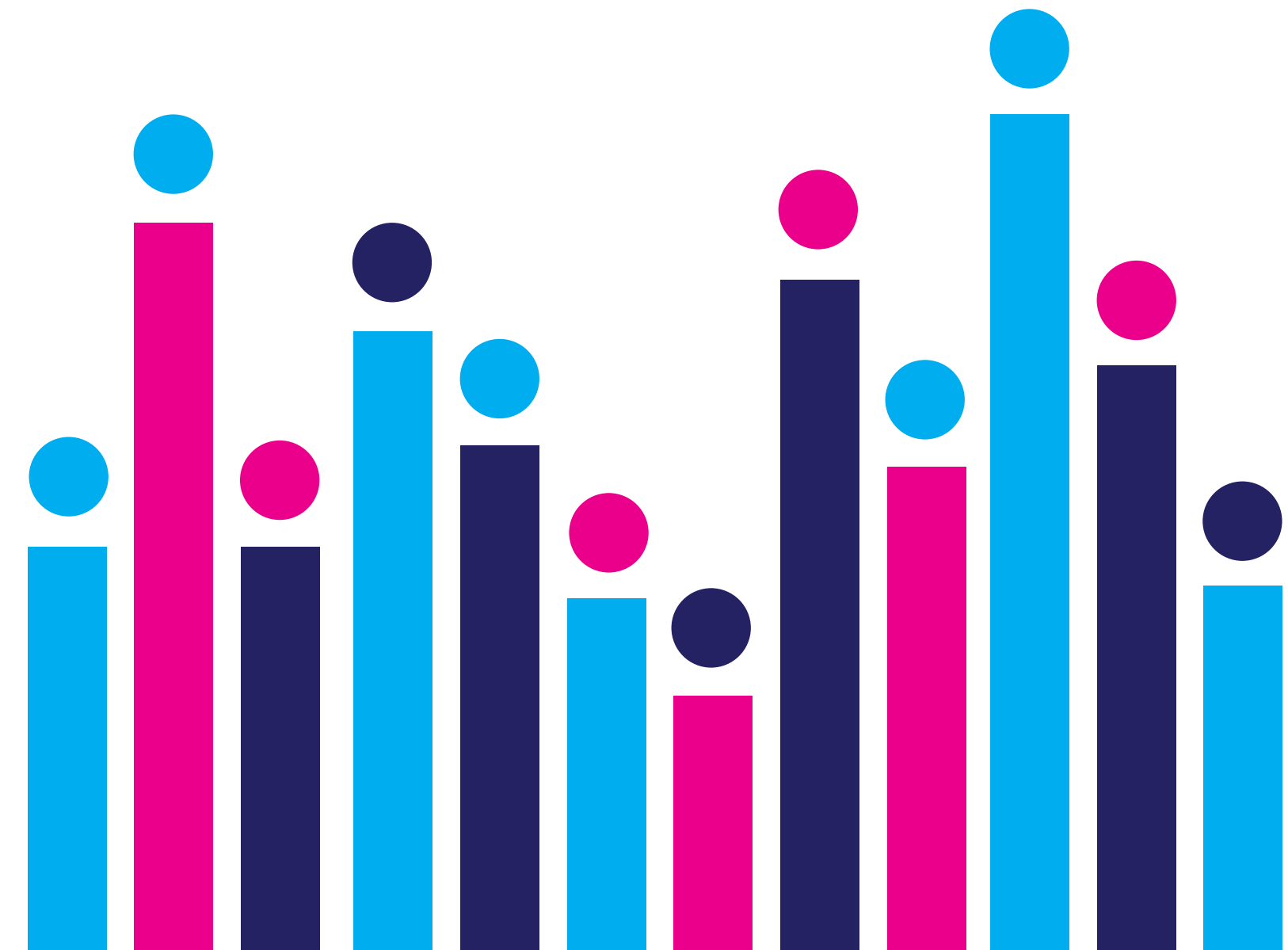


# For parents, culture is a family affair.

Parents are

60%

more likely to be  
members of a cultural  
loyalty program.





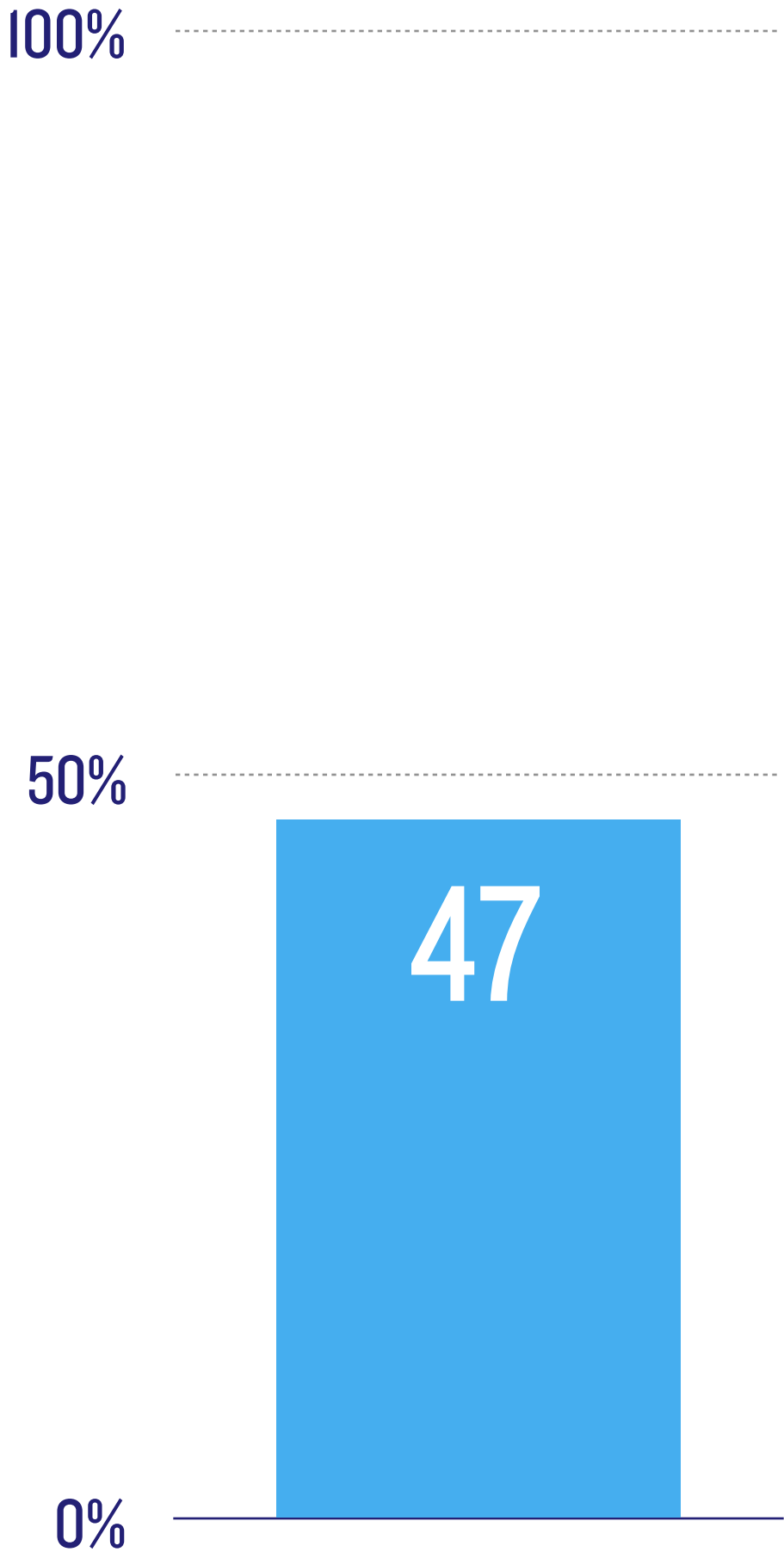
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# The Giving Gap

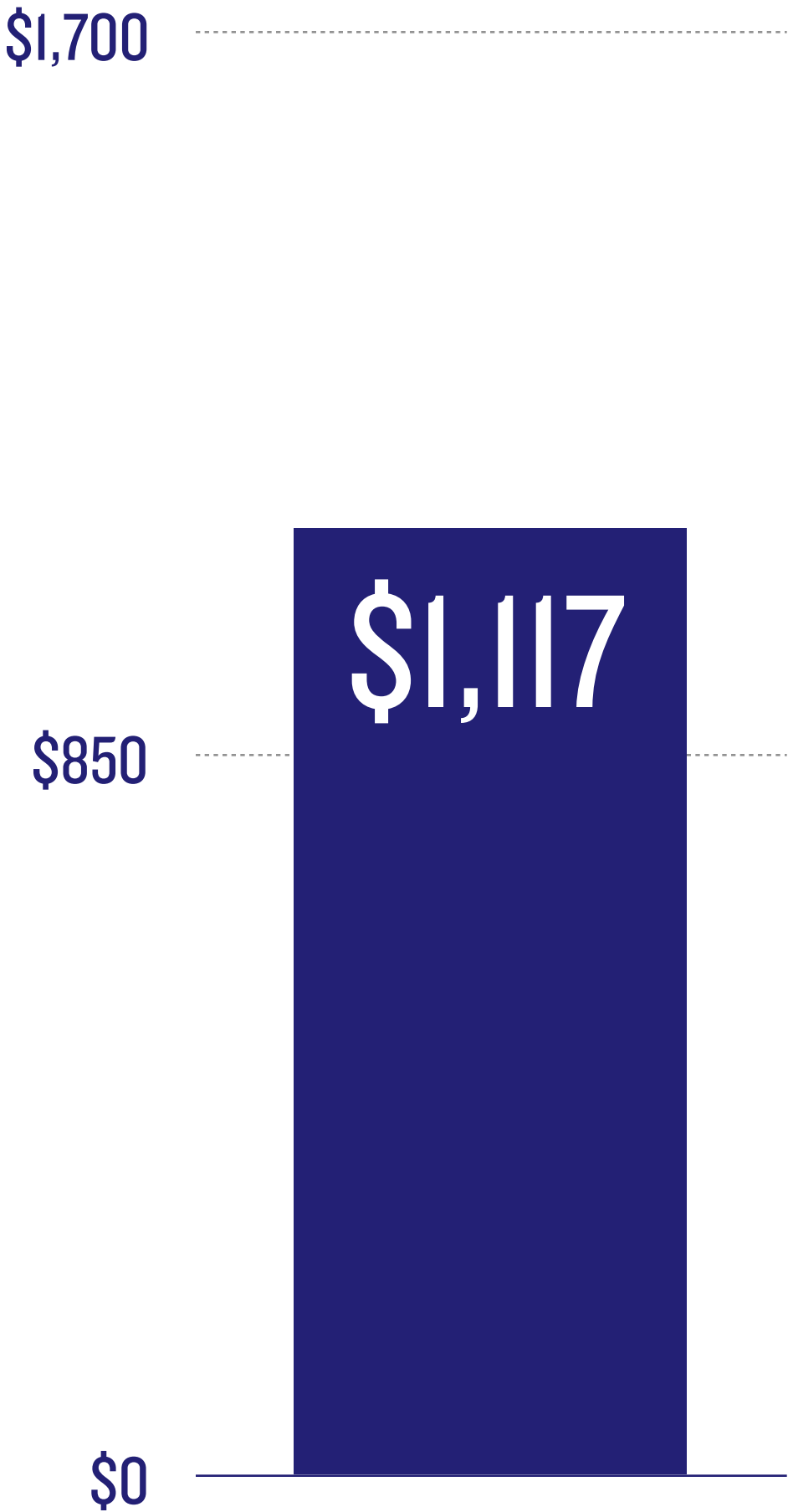
**Nearly half of audiences donate  
money to causes or organizations  
they support.**



# Donate to Charities or Organizations



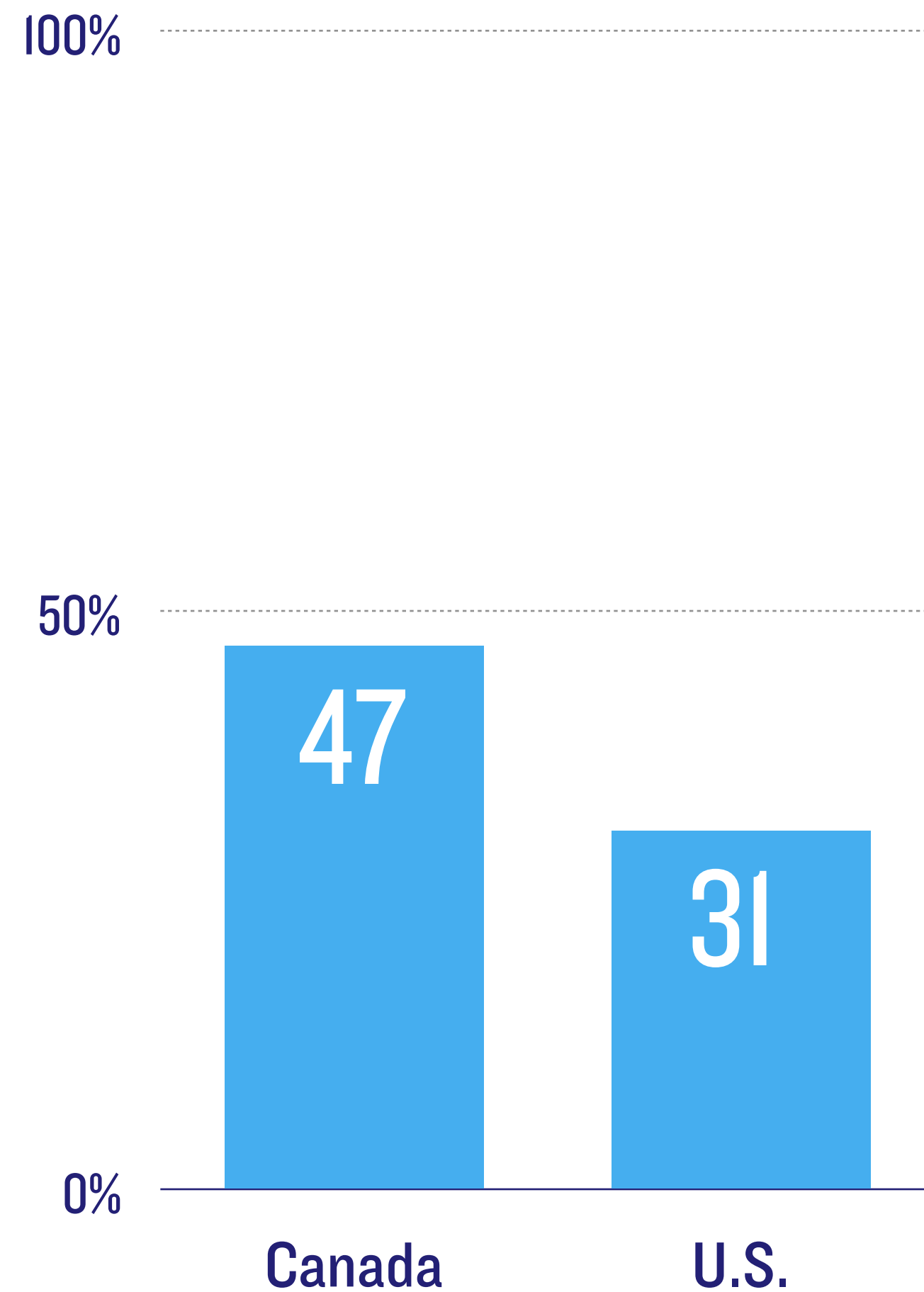
# Average Annual Donation



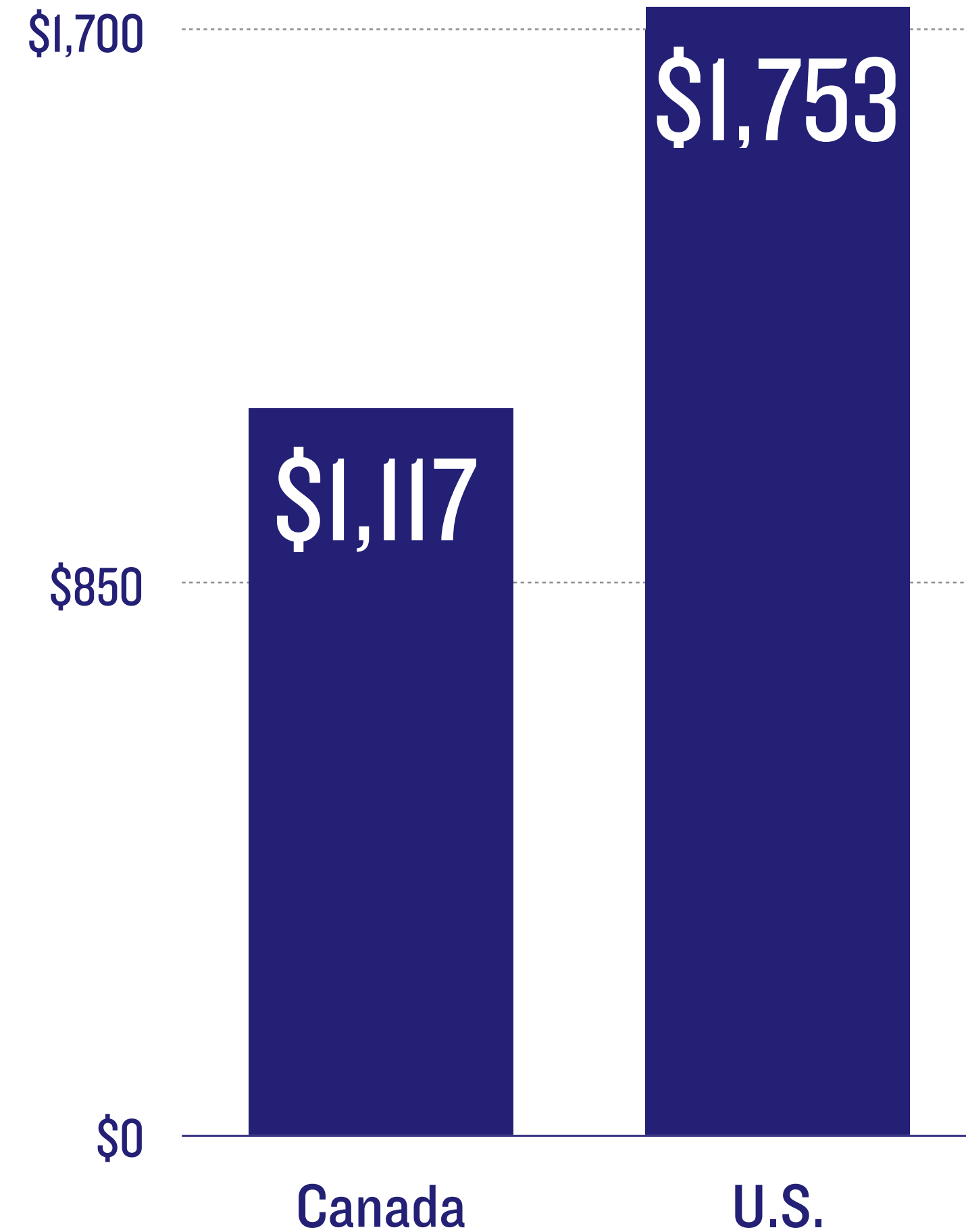
**Although American audiences give higher amounts to causes overall, a greater percentage of Canadian audiences are donors.**



## Donate to Charities or Organizations



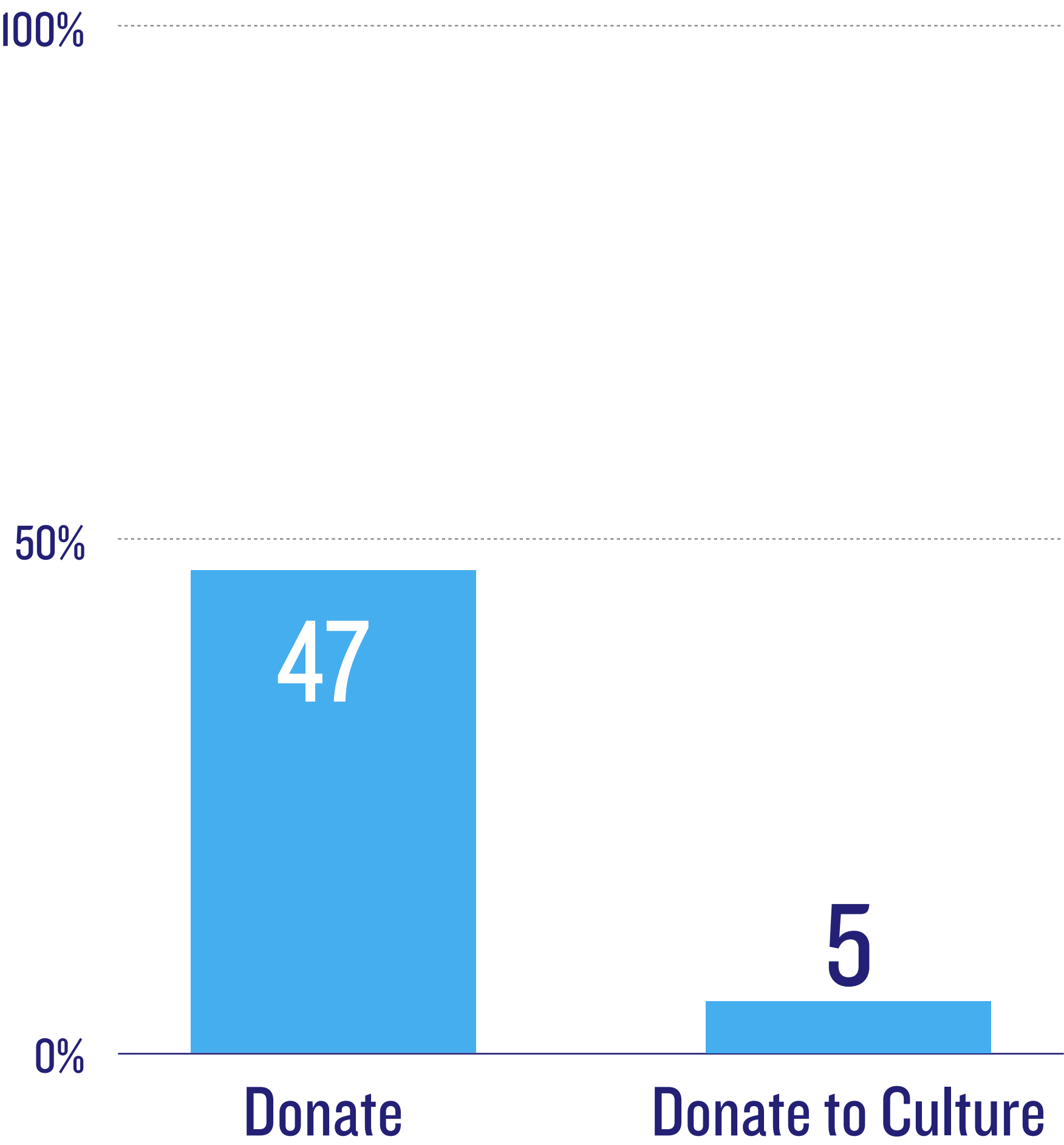
## Average Annual Donation



**When Canadian audiences decide what to give to, culture is rarely the priority.**



# Donate to Charities or Organizations



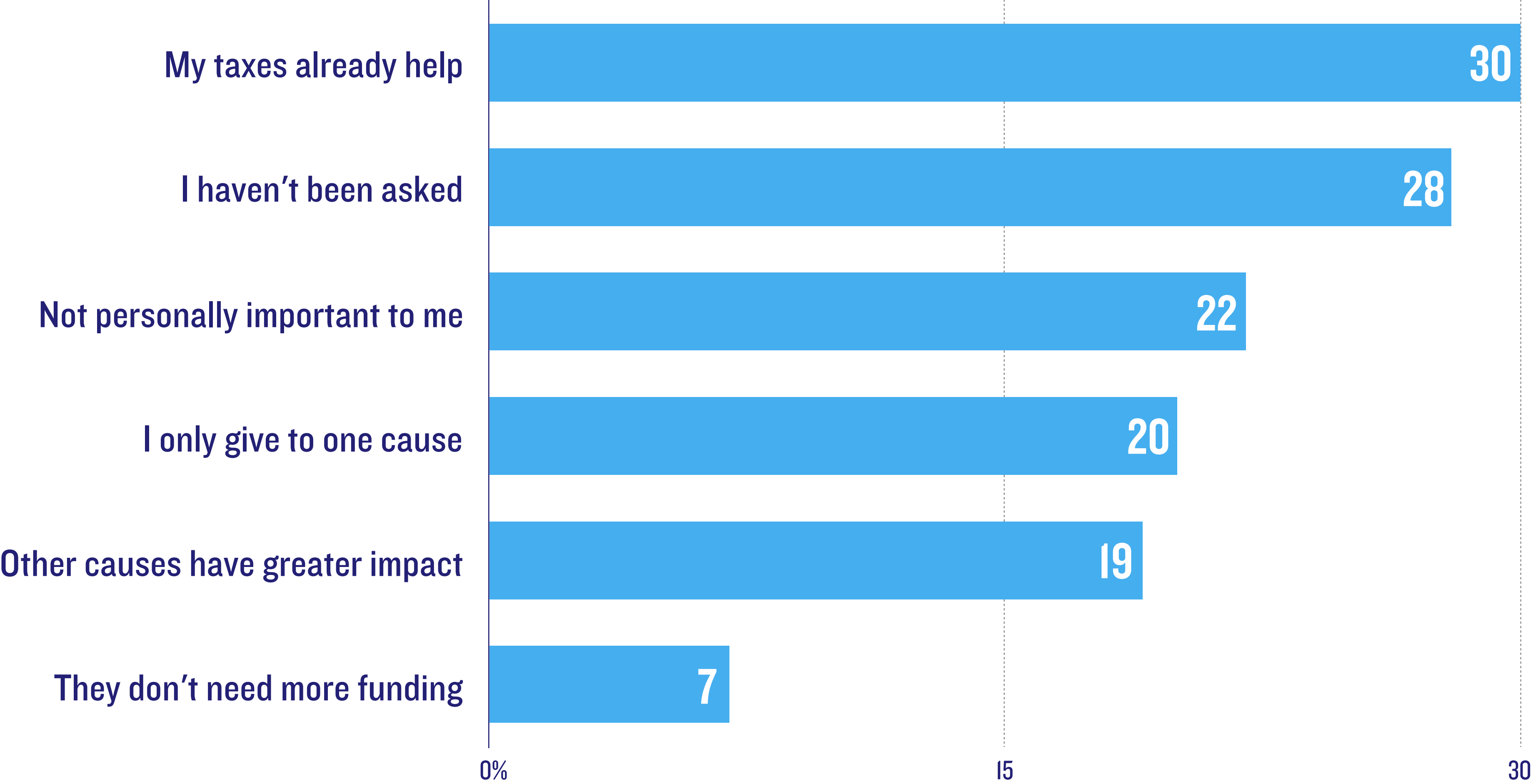
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# Why?

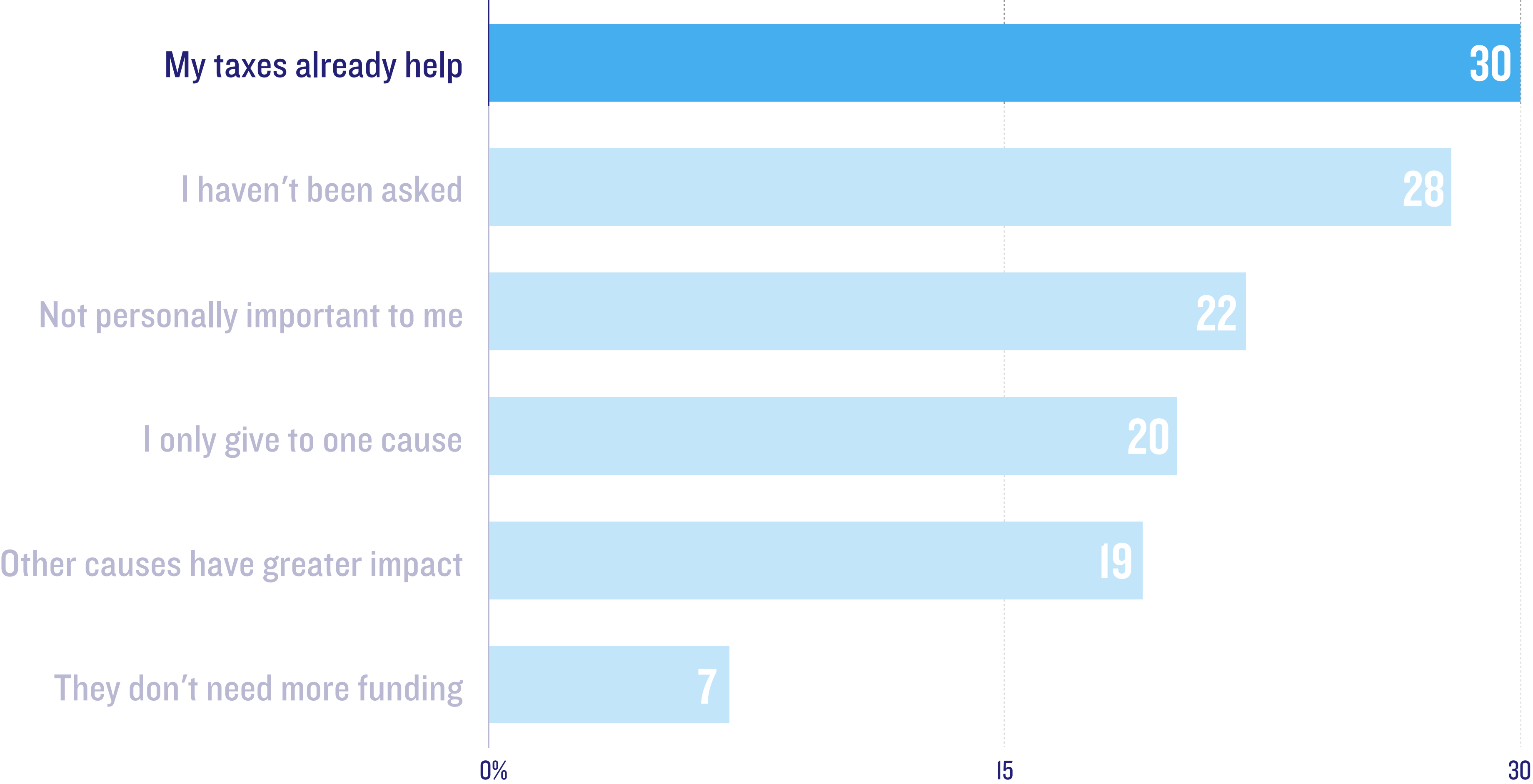
**The perception of governmental support is a crucial reason why audiences don't donate to culture.**



# Reasons for Not Donating to Culture



# Reasons for Not Donating to Culture

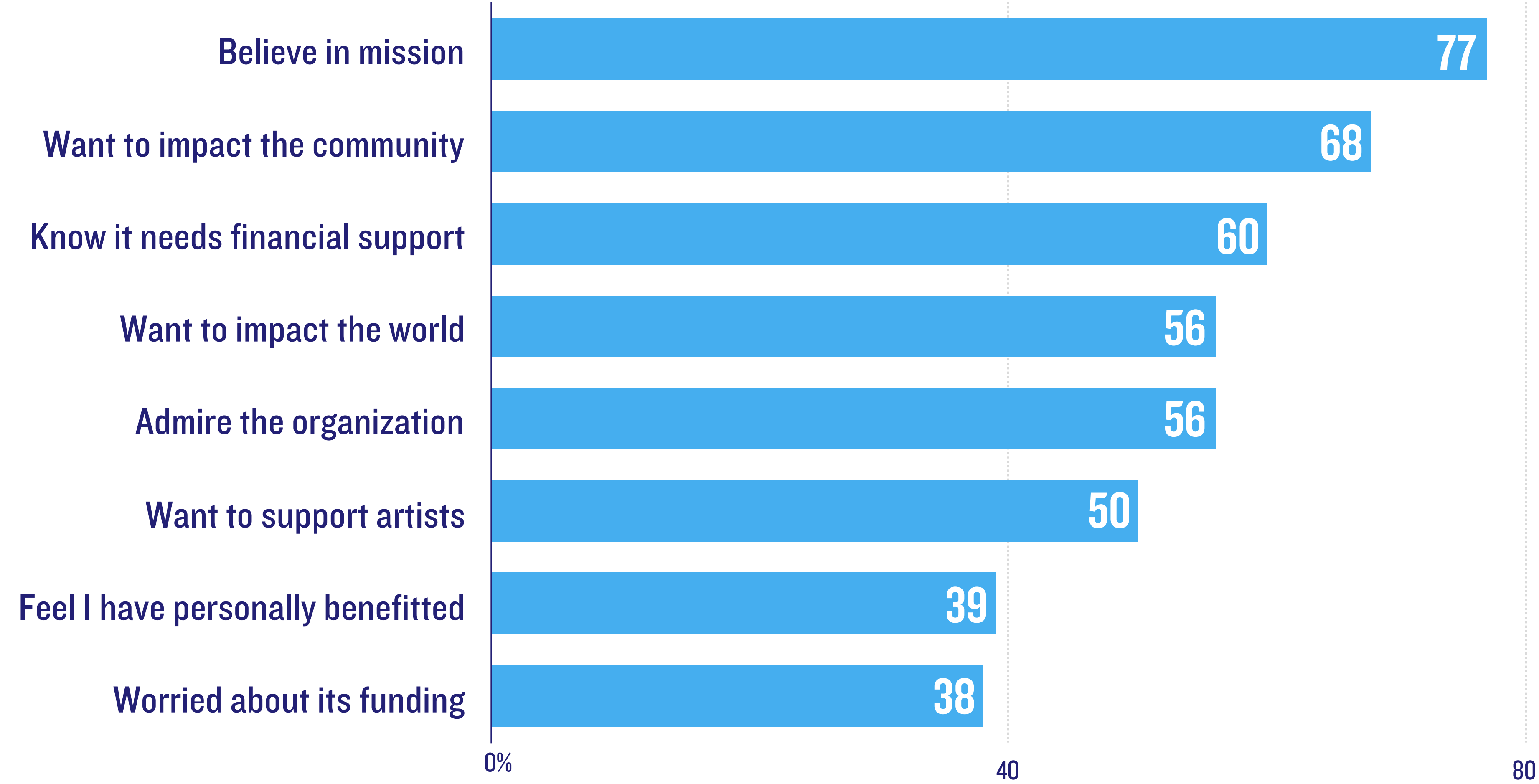




**Those who do donate to culture are  
motivated by one key factor:**

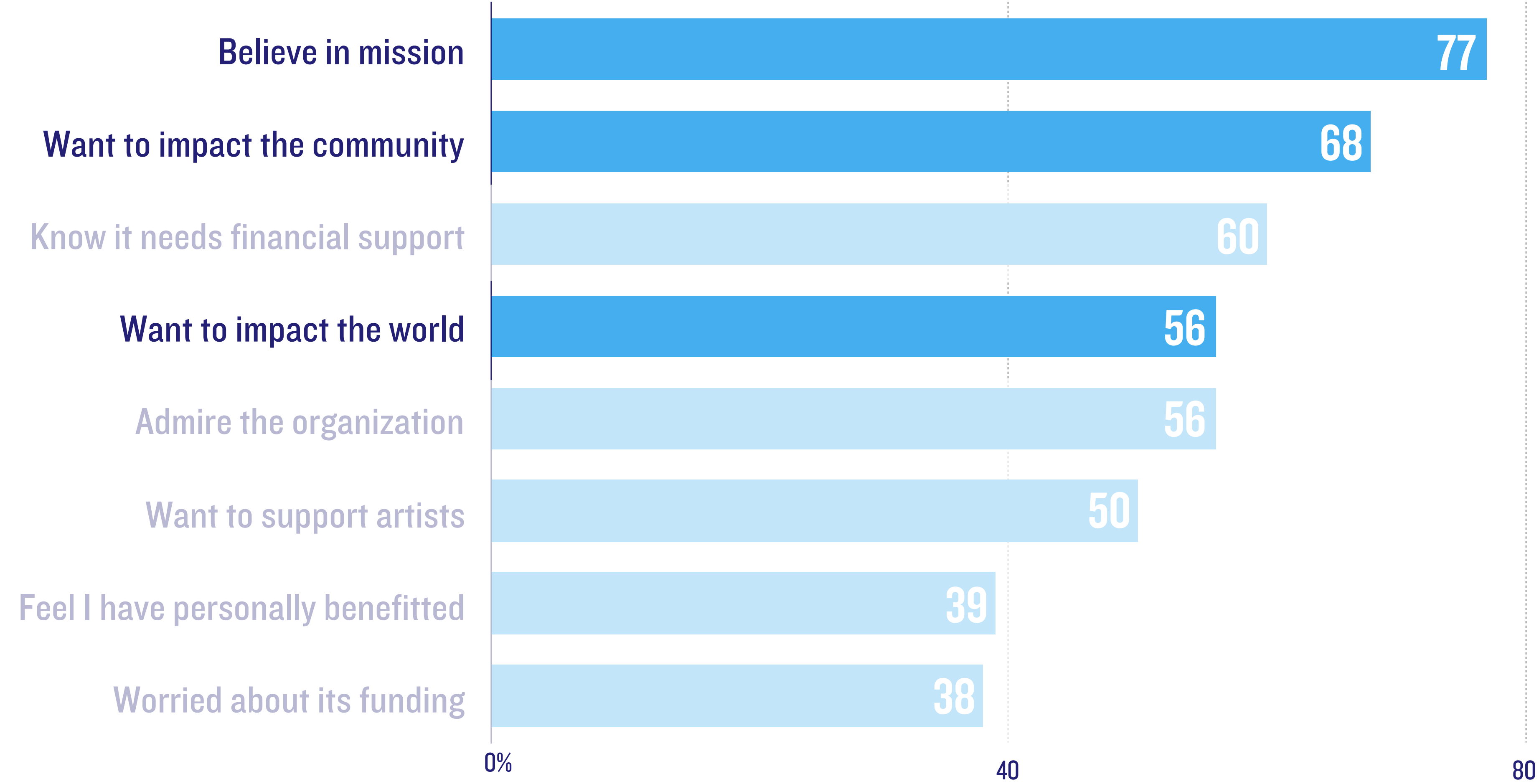
**Social impact.**

# Motivators for Donating to Culture





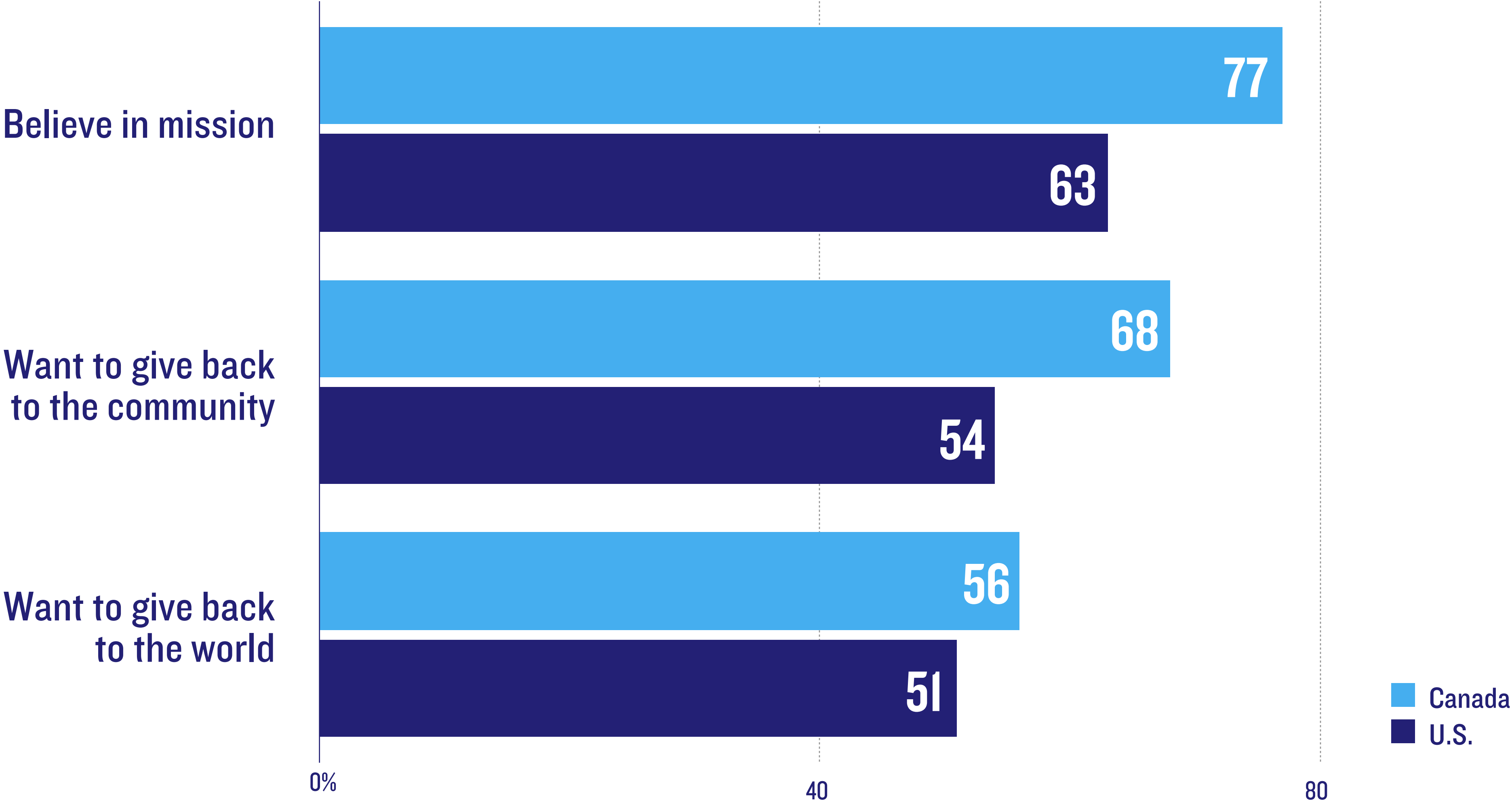
# Motivators for Donating to Culture



**Social impact was also the top motivator for giving in the U.S.—but for Canadians, it's even more critical.**



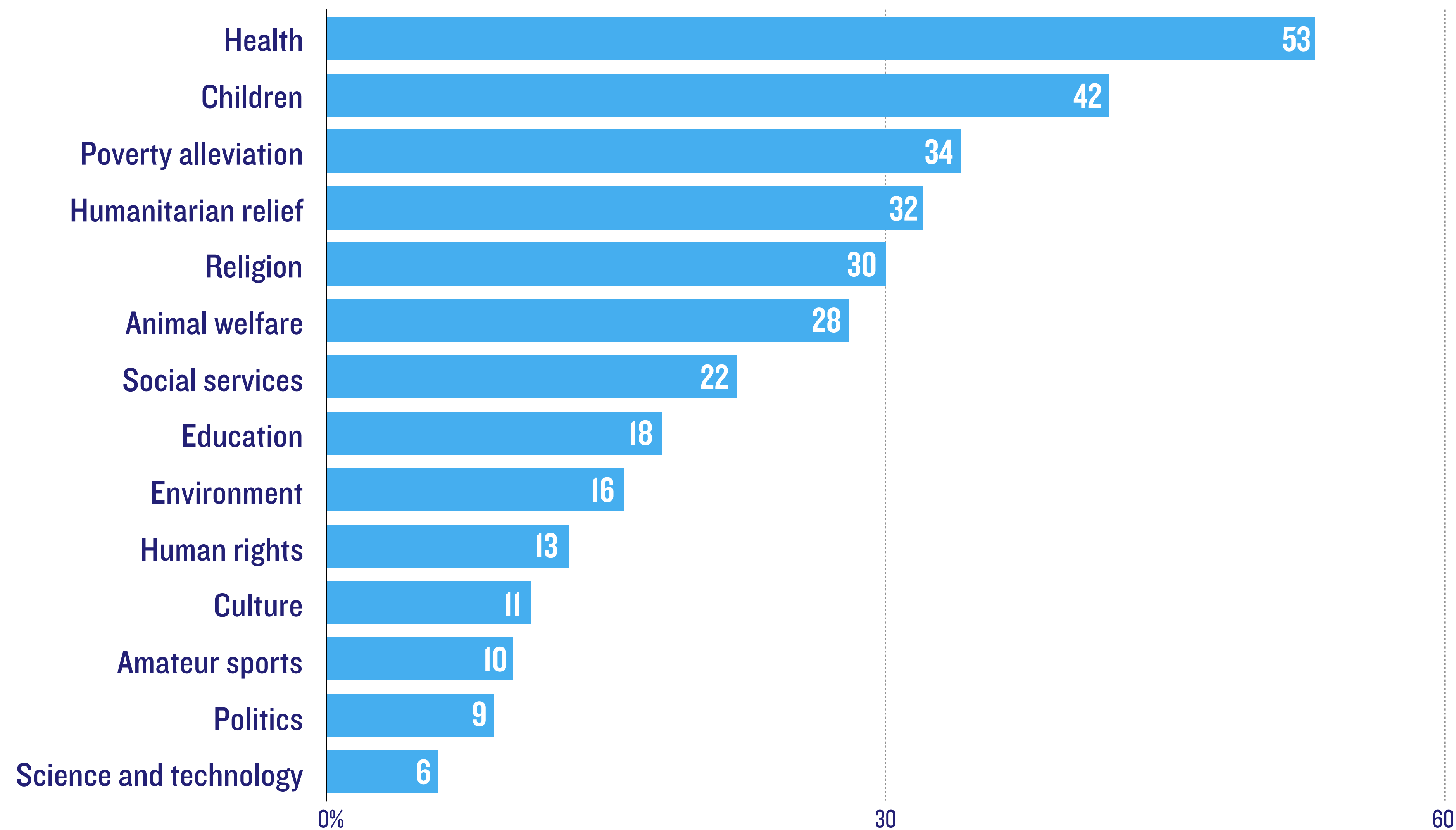
# Motivators for Donating to Culture



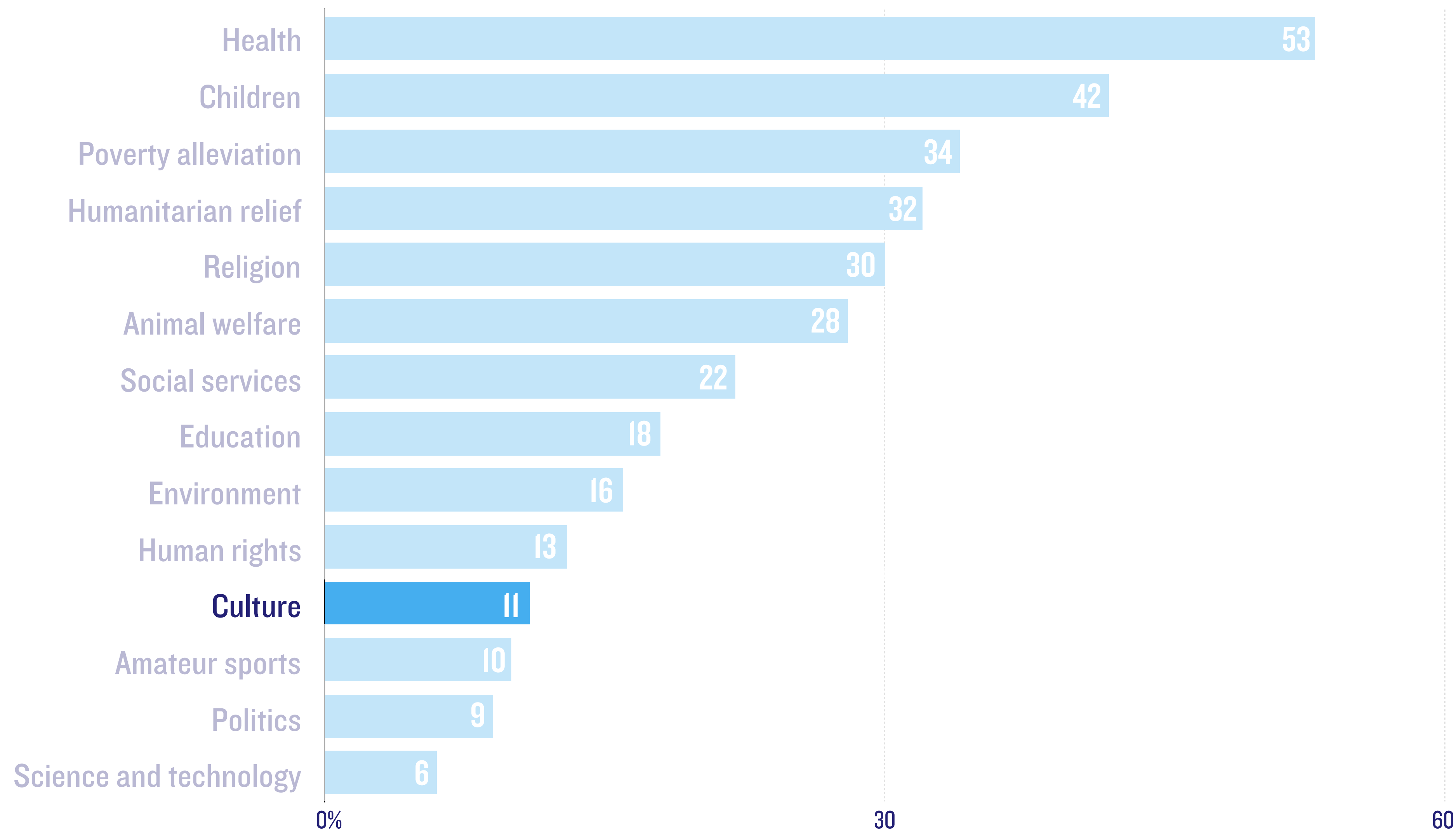
**The cultural world is lagging behind others who are proving impact in measurable ways.**



# Comparative Appeal by Philanthropic Cause



# Comparative Appeal by Philanthropic Cause





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**To bridge the gap, cultural organizations  
need to illustrate their indelible impact  
on society...**

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**To bridge the gap, cultural organizations  
need to illustrate their indelible impact  
on society...**

**...and emphasize the critical need of giving.**



# The Giving Gap

## Spotlight Stats



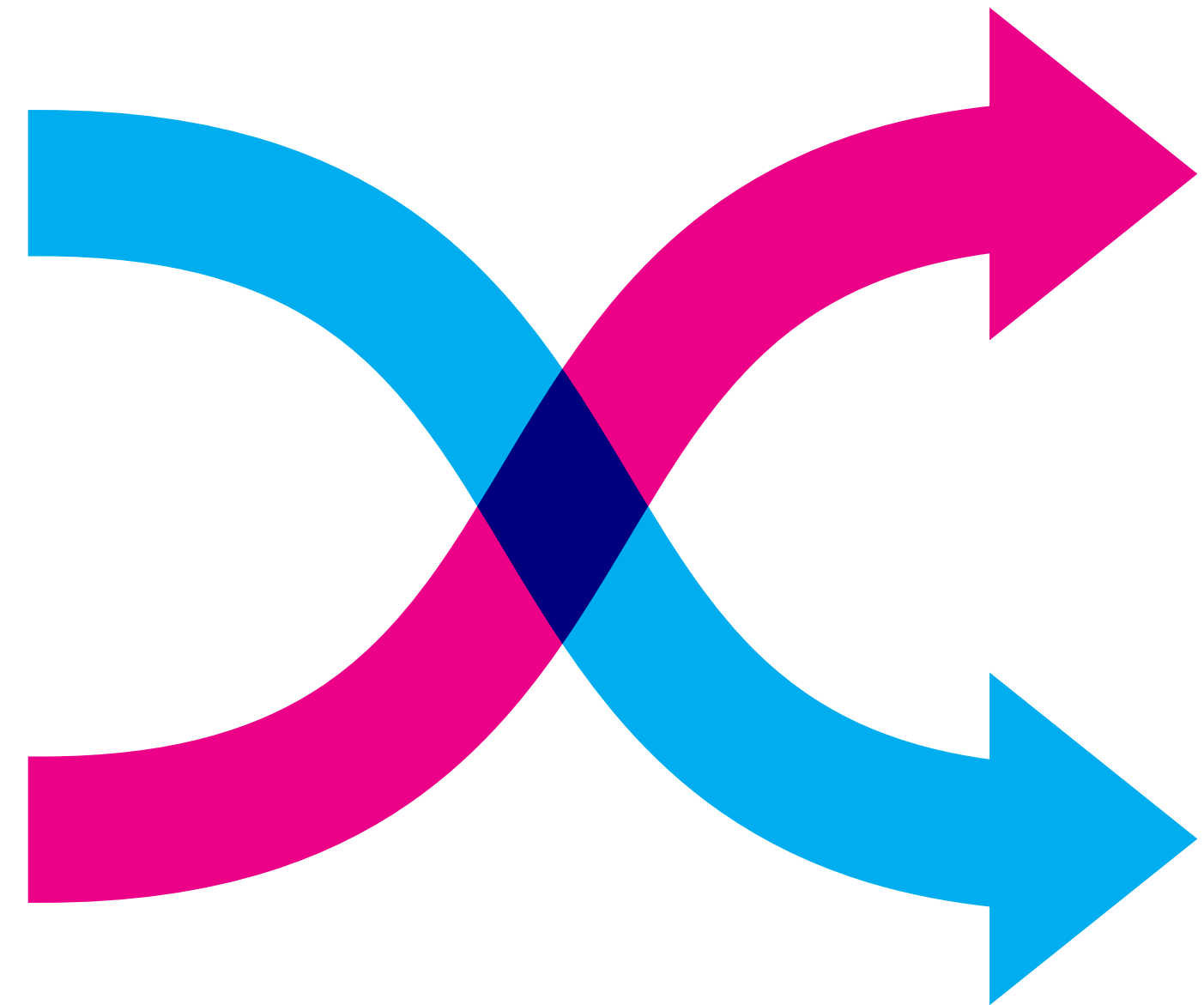


# Social change inspires young philanthropists.

Millennial donors are

2/3

more likely to give to  
human rights causes.



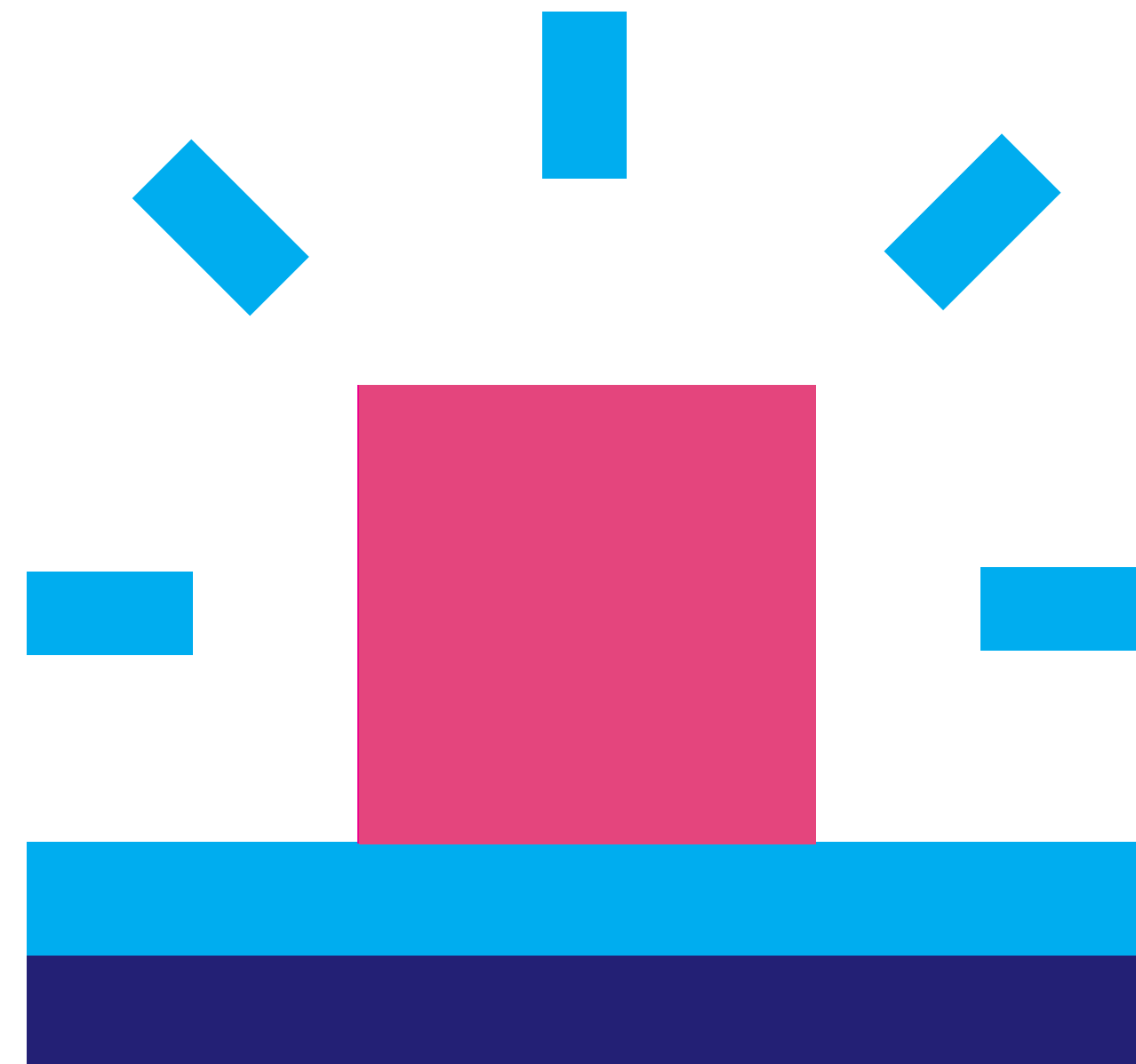


# Corporate sponsorship makes business sense.

More than

1/3

of audiences are more likely to buy a cultural corporate sponsor's product.



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# Conclusion: Five Key Takeaways

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# #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 pre-condition 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.

Download the full report at:

[www.businessandarts.org/culturetrack](http://www.businessandarts.org/culturetrack)



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