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Urban and Allophone Ontarians tend to have higher cultural activity participation rates

Ontario Culture Study

The questionnaire was developed in collaboration with LaPlaca Cohen, Nanos Research, and Business for the Arts. LaPlaca Cohen is a a New York-based strategy, marketing, and design firm, and this study builds on their long-running Culture Track research initiative in the United States.

Ontario Contributor:





Survey of

1,012 cultural consumers across Ontario



Respondents by sub-regions of Ontario

103

East

North

76

101 Central

250

South Central

Toronto

230

252

Southwest

*Oversamples weighted to the true population proportion



Culture Track (ON)

85%

Anglophone

<1%

Francophone

14%

Allophone

ON Population*

82%

Anglophone

2%

Francophone

15%

Allophone



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The Ontarian Cultural Landscape

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• Toronto residents are more likely to participate in the benchmark arts than Ontario residents.

	Toronto	Ontario (All)
Musical	65%	56%
Non-musical play	60%	49%
Classical music	52%	40%
Jazz Music	49%	33%
Opera	35%	21%
Ballet	37%	20%



• Allophones are more likely to participate in the benchmark arts than Anglophones.

	Allophones	Anglophones
Classical music	53%	38%
Jazz Music	47%	31%
Opera	35%	18%
Ballet	30%	19%



• Toronto residents are more likely to participate in public events and festivals than the rest of Ontario.

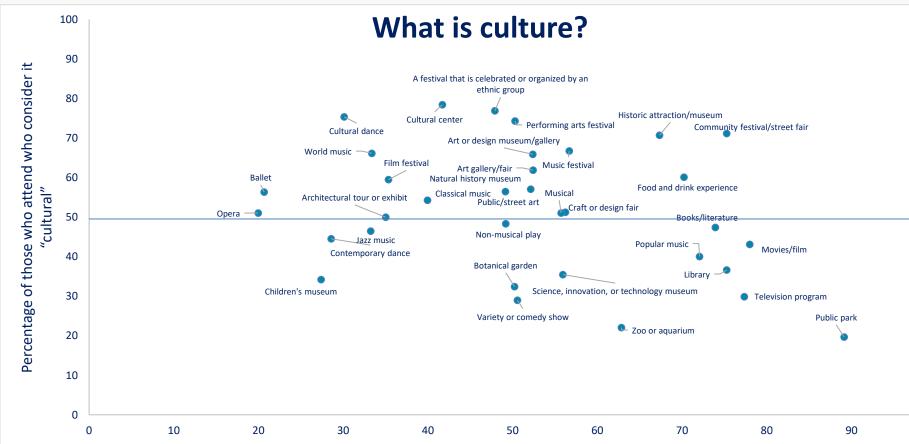
	Toronto	Ontario (All)
Public/street art	62%	49%
Art gallery or fair	66%	52%
A festival celebrated/ organized by an ethnic group	61%	48%
Performing arts festival	60%	50%
Film Festival	57%	35%



• Allophones are more likely to participate in public events and festivals than Anglophones.

	Allophones	Anglophones
Food and drink experience	79%	69%
A festival celebrated/ organized by an ethnic group	72%	44%
Art gallery or fair	66%	50%
Performing arts festival	62%	48%
Public/street art	61%	47%
Film Festival	55%	32%





Percentage who attend each type in a year

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100



- Overall, Toronto has a higher participation rate than all other Ontario regions, especially in Benchmark arts and Festivals.
- Allophones report higher participation rates in most activities than Anglophones.

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- Central (35%) and South Central (34%) Ontarians report attending film festivals more frequently than Southwestern (24%) and Northern (21%) Ontarians.
- Residents of Northern (43%) and Eastern Ontario (39%) less frequently report attending musicals than residents of Central, Southwestern and South Central Ontario (56% each) and Toronto (66%).



"Stimulation by offering different insights/experiences that is either new to me or ones that I wouldn't otherwise be exposed to."

*Gen X resident from Toronto



"To bring me together with people like me, and to bring a community together socially."

*Pre-War resident from Toronto



"I love music and love to hear live music played in local theatres. My life would be much much less without it."

*Gen X resident from Toronto



"It motivates me to keep reflecting on my life and what I can do to make it more beautiful and better for myself and others."

*Gen X resident from Toronto



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Today's Cultural Consumer



Ontarians' attitude toward cultural activities

• What is their mindset?

Why do they engage in cultural activities?

B What causes them to stay away?



The greatest motivators are:

having fun

2 being interested in the content



Top Motivators to Attend Cultural Activities (Ontario) Anglophone Allophone 34% 78% 76% 44% 43% 73% 73% 30% 26% 45% 70% 71% 26% 43% 69% 71% 24% 42% 65% 70% 22% 40% 62% 62% 20% 41% 60% 65% 20% 40% 59% 64% 20% 38% 57% 65% 18% 39% 56% 61% 18% 37% 54% 61% Strongly agree Somewhat agree 22 | NANOS | ON

Having fun Interest in the content Relaxing or feeling less stressed Experiencing new things Learning something new Interacting with friends and/or family Feeling inspired Broadening my perspective or worldview Feeling transported to another place Bettering my emotional well-being Feeling welcome



1 What does "having fun" look like?

What does that mean for cultural organizations?



Characteristics of an Ideal Cultural Activity

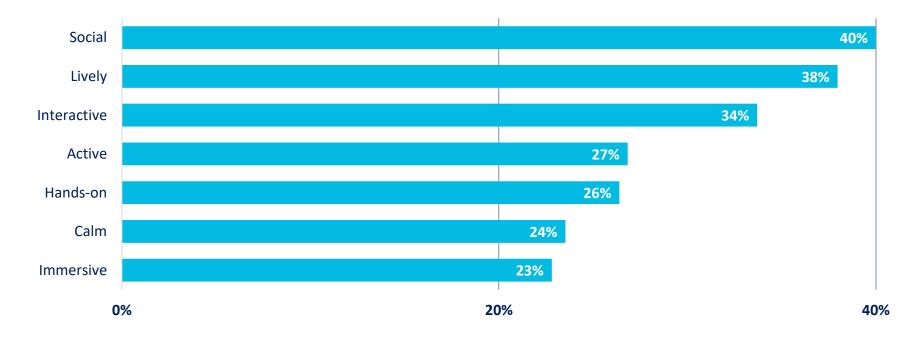




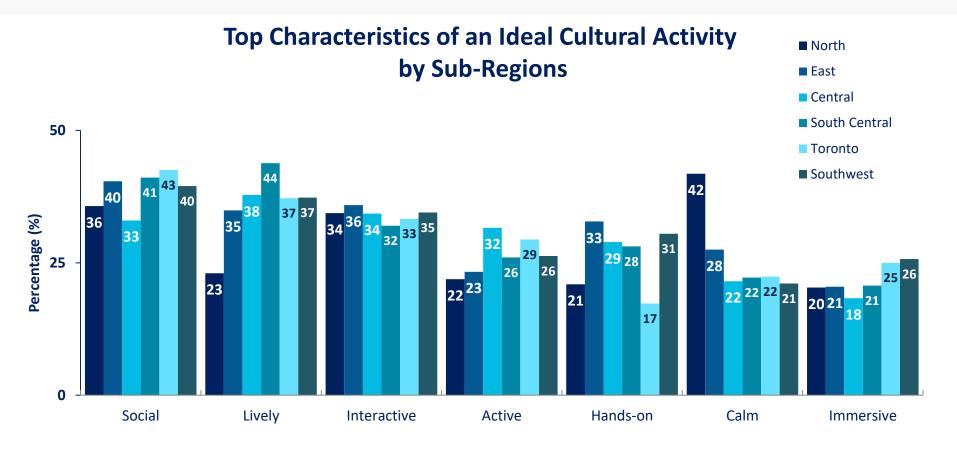
3 Interactive



Top Characteristics of an Ideal Cultural Activity





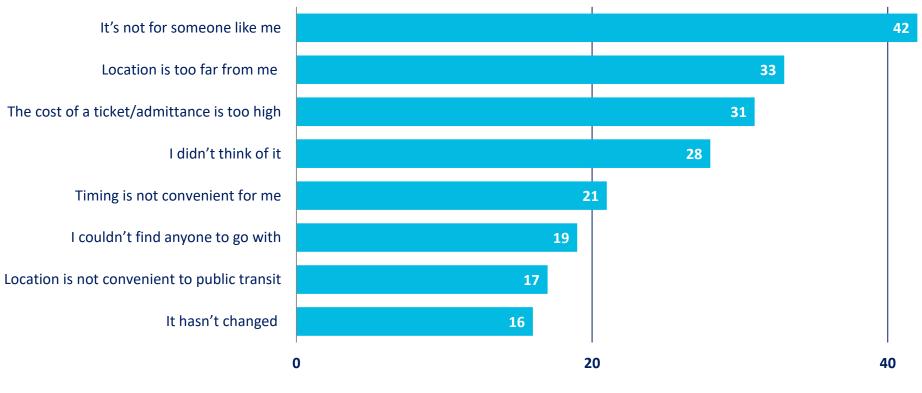




• What drives people away from cultural activities?



Top Barriers to Cultural Participation



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Top Barriers to Cultural Participation Ontario Canada 42 It's not for someone like me 35 33 18 31 20 28 16 21 9 19 8 17 6 20 40 0

Location is too far from me

The cost of a ticket/admittance is too high

I didn't think of it

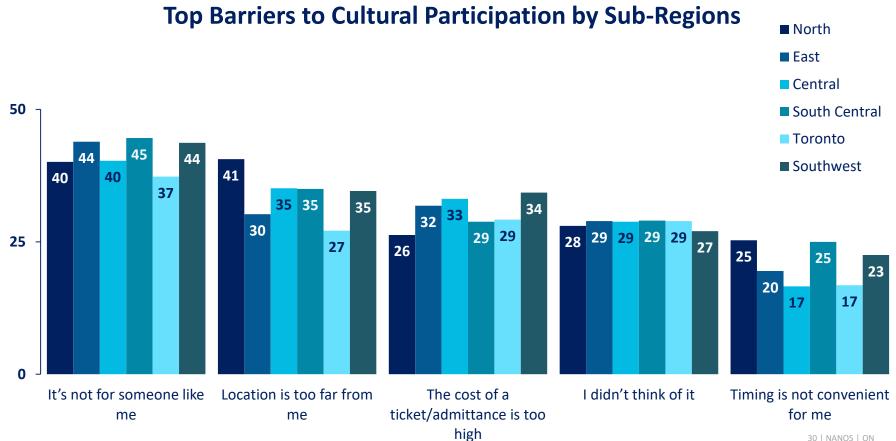
Timing is not convenient for me

I couldn't find anyone to go with

Location is not convenient to public transit









- Residents of Toronto (27%) are less likely to report the location being too far away from them as a barrier to participation than residents of Northern (41%), Central, South Central and Southwestern Ontarians (35% each).
- Residents of Toronto (17%) are less likely to want their ideal activity to be hands on than Ontarians overall (26%).



- Residents of Northern Ontario are less likely to want their ideal activity to be lively (23%) than Ontarians overall (38%).
- Residents of Northern Ontario are more likely to want their ideal activity to be calm (42%) than Ontarians overall (24%).



- Residents of Central Ontario are more likely to say their ideal activity would be active (32%) than Northern (22%) and Eastern (23%) Ontarians.
- Residents of Toronto and Central Ontario (17% each) are less likely to mention inconvenient timing as a barrier to cultural participation than North and South Central residents (25% each).



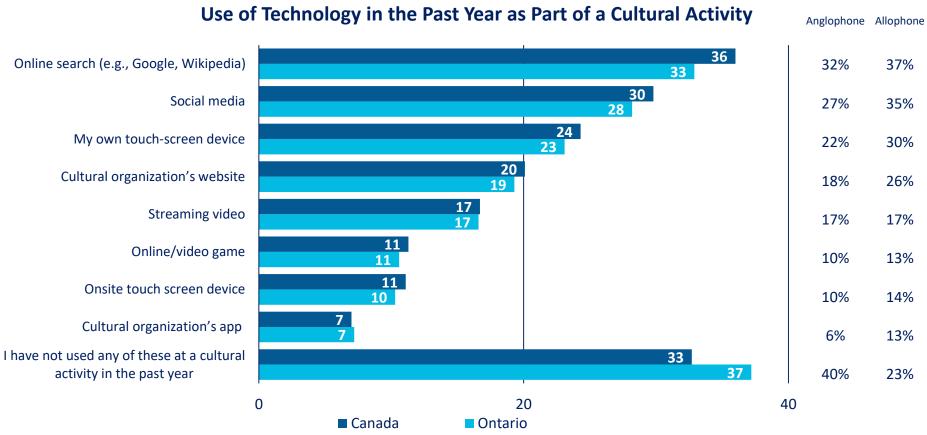
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The Tech Lag



Over one third of Ontarians (37%) have not used technology as part of a cultural activity, but when they do, it is most frequently done through an online search.



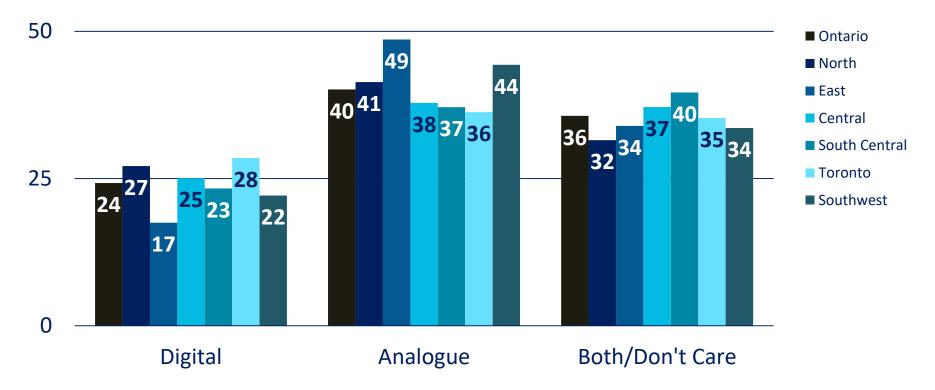




Ontarians are divided on whether technology should be a part of a cultural activity.



Desire for Digital or Analogue Cultural Activities





Top Reasons Why Digital Appeals in Cultural Activities

- Allows me to share my experience with friends or family
- 2 Helps me understand the content on a deeper level
- Gives me tools to access more detailed information
- 4 Lets me view the content from other locations



Top Reasons Why Analogue Appeals in Cultural Activities

Allows me to focus on the activity more

2 Makes me enjoy the activity more

3 Feels more authentic

4 Lets me consume information how I like to

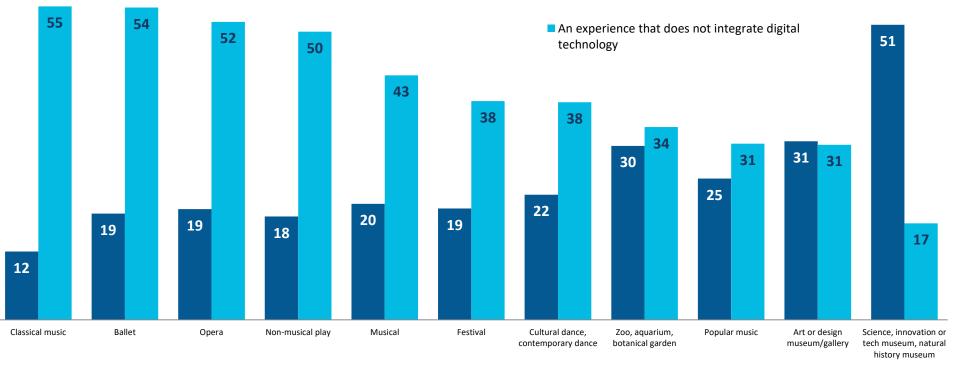


This opinion shifts across activities.



Interest in Digital or Analogue as Part of Cultural Activity

An experience that integrates digital technology





Ontarians are more than 2x more likely to have used a cultural organization's website than their app.

*7% of respondents have used a cultural organization's app, 19% have used a cultural organization's website as part of a cultural activity. n=1012



- Anglophones (40%) are more likely to report that they have not used any technology as part of a cultural activity in the past year than Allophones (23%).
- Residents of Eastern Ontario (43%) and Southwestern Ontario (40%) are more likely to report that they have not used any technology as part of a cultural activity than Toronto residents (31%).



- Residents of Toronto (28%) and Northen Ontario (27%) are more likely to want an activity to be digital than residents of Eastern Ontario (17%).
- Residents of Toronto (36%), South Central Ontario (37%) and Central Ontario (38%) are less likely to want a cultural activity to be analogue than Eastern Ontario residents (49%).



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The Future of Affinity



Ontarians are most motivated to have a personal commitment to:

Banks

On-profit charities

Southand beverage companies

and cultural organizations (22%) are one of the least frequently cited organization for which they have a personal commitment to.

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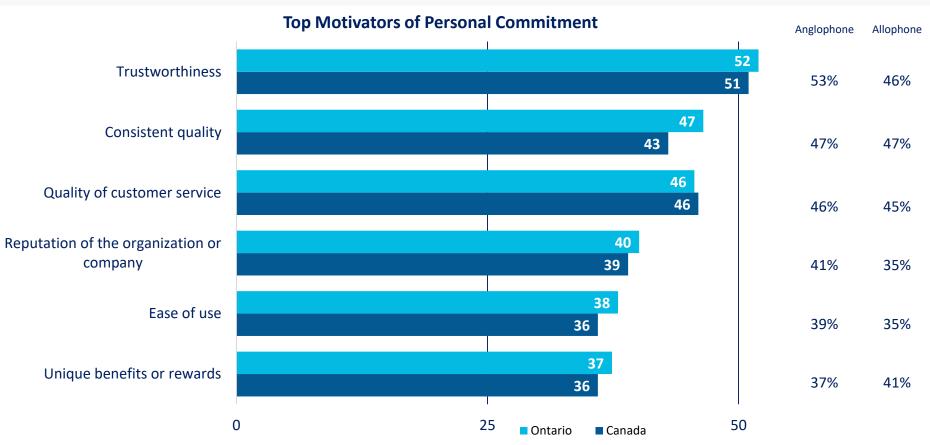
Like Canadians, Ontarians' ideal partner is:

Trustworthy

Offers consistent quality

B Has good customer service

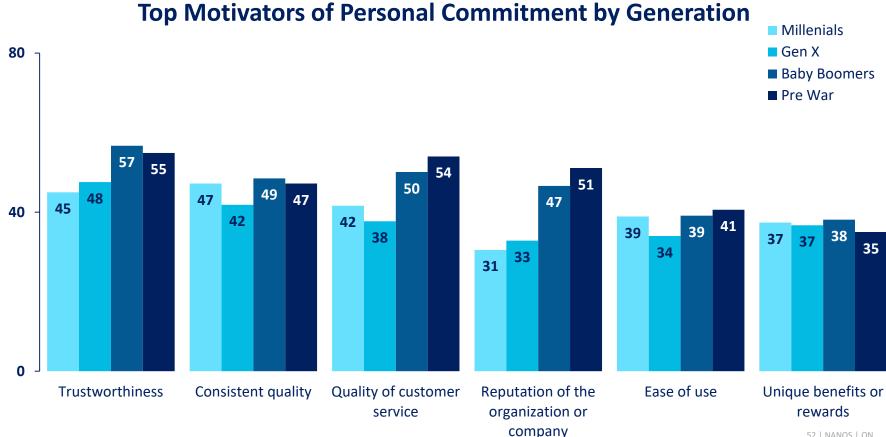
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Personal commitment is motivated by different elements for different age groups.





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Ontarians are most motivated to join a cultural organization's loyalty program if:

It encouraged them to have experiences they wouldn't have otherwise

2 It made them feel like the money was going to a good cause

3 It had entry deals or benefits

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Motivators to Join a Loyalty Program Anglophone Allophone Encouraged me to experience things I wouldn't otherwise 41 41% 40% experience Made me feel like my money was going to a good cause 39 39% 37% Had entry deals or benefits (e.g., early access, discounted or 29 complimentary tickets) 30% 27% Provided discounts to stores, restaurants, bars, etc. 28 28% 31% Gave me a sense of belonging 26 24% 38% Helped me avoid the crowds 26 26% 22% Gave me opportunities to socialize with others 25 25% 26% Gave me the ability to bring someone with me 25 25% 26% 20 40 0



- Ontarians are almost twice as likely to report having a personal commitment to banks (43%) than to arts and cultural organizations (22%).
- Millennials (31%) are less likely to mention the reputation of the organization/company as a motivator of personal commitment than Baby Boomers (47%).



- Allophones are more likely to report having a personal commitment to food and beverage companies (48%) and faith groups (36%) than Anglophones (39% and 25%, respectively).
 - Anglophones are more likely to report having a personal commitment to sports teams (37%) than Allophones (24%).



 Toronto (26%) and Northern Ontario (25%) residents are more likely to report having a personal commitment to arts and cultural organizations than Central Ontario residents (16%).



- Baby Boomers (57%) are more likely to mention trustworthiness as a motivator of personal commitment than Millennials (45%).
- Toronto residents (19%) are more likely to mention social media as a motivator of personal commitment than East (nine per cent) and Central Ontario residents (seven per cent).



- Allophones (38%) are more likely to report being motivated to join a loyalty program if it gives them a sense of belonging than Anglophones (24%).
- Residents of Eastern (63%) and South Central Ontario (59%) more frequently mention trustworthiness as a motivator of personal commitment than residents of Northern (46%) and Southwestern (48%) Ontario and Toronto (44%).



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The Giving Gap

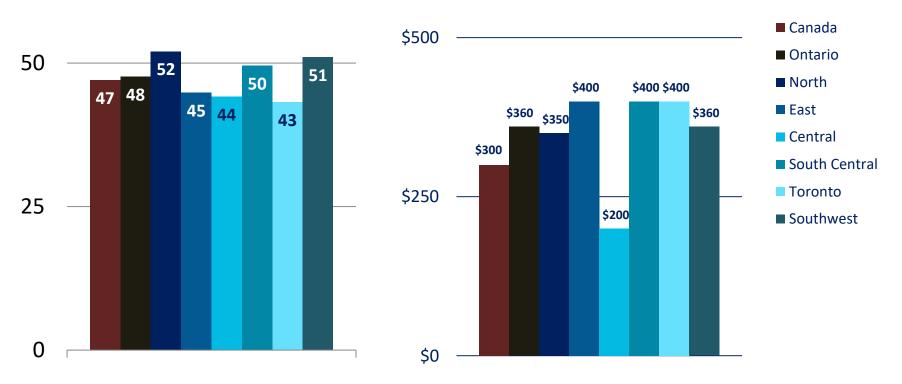


Like Canadians, close to half of culturally engaged Ontarians report donating money to causes or organizations and Ontarians donate on average, slighty more than Canadians.



Percentage that donates to charities or organizations

Median Annual Donation





Percentage that donates to charities or organizations

Median Annual Donation



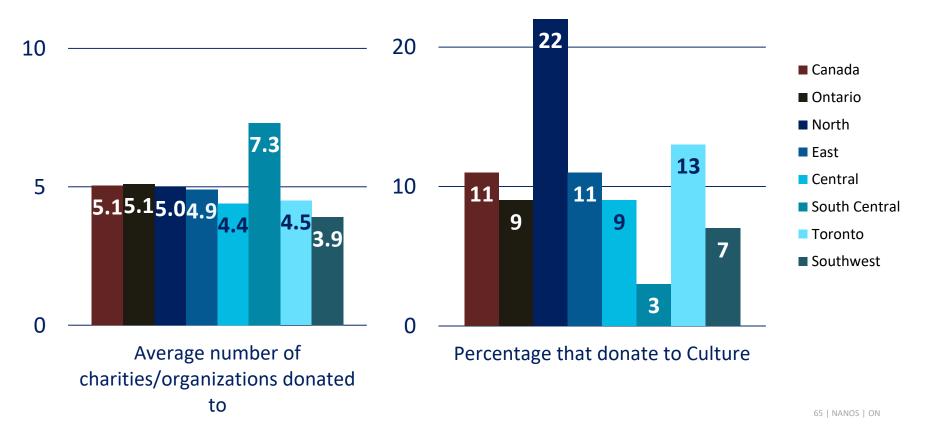
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Out of those who donate to charities and organizations, less than one in ten Ontarians donate to culture.



Donate to Charities or Organizations



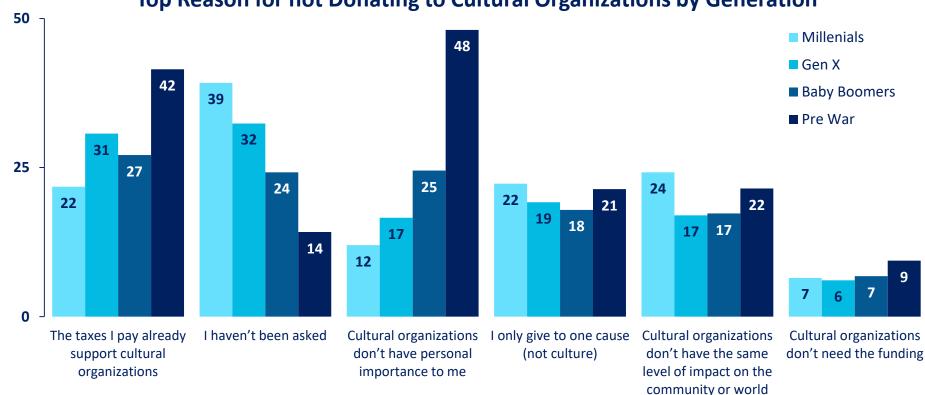


Like Canadians, close to three in ten Ontarians don't donate to cultural organizations because the believe the taxes they pay already support them.









Top Reason for not Donating to Cultural Organizations by Generation

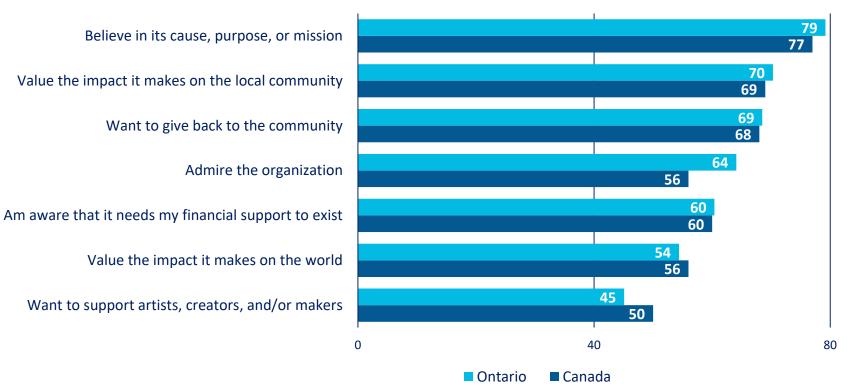
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Believing in its cause, purpose or mission is the top motivator (79%) of donations to cultural organizations for Ontarians.



Top Motivators to Donate to Cultural Organizations

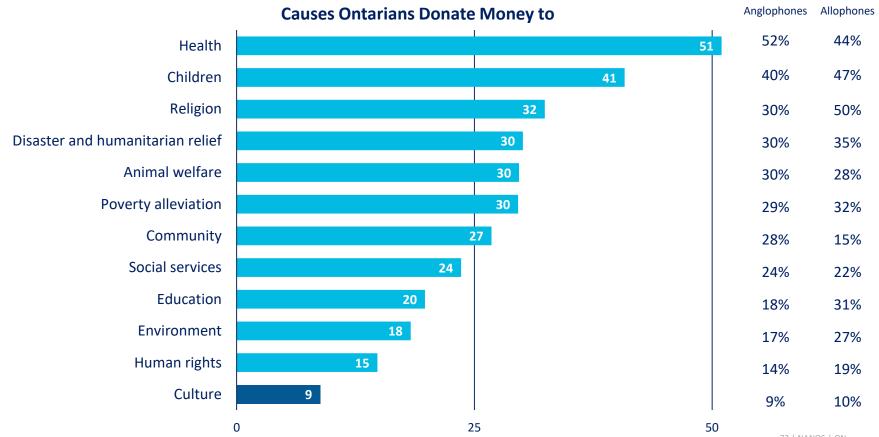


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Out of several philanthropic causes, culture is one of the causes the least frequently donated to by Ontarians.

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- Anglophones (49%) are more likely to report donating to charities and organizations than Allophones (37%).
- Residents of Toronto, South Central Ontario and Eastern Ontario report a higher median annual donation (\$400) than residents of Central Ontario (\$200).
- Allophones have a higher reported median annual donation (\$500) than Anglophones (\$350).



 Residents of Northern Ontario that report donating to charities or organizations (22%) are more likely to donate to cultural organizations than all Ontario residents (nine per cent).



 Allophones (36%) are more likely to mention not being asked as a barrier to donating to cultural organizations than Anglophones (25%), while Anglophones (26%) are more likely to mention that cultural organizations don't have personal importance to them as a barrier to donating to them than Allophones (five per cent).



 Allophones are more likely to report donating to religion (50%) and education (31%) causes than Anglophones (30% and 18%, respectively).



Key Takeways



Cultural activities are viewed by Ontarians as a way to be exposed to new activities through social interactions. Experiencing new things and having fun are key motivators to cultural participation and the top characteristic of the ideal activity for Ontarians is <u>social.</u>



The location being too far and the high cost of tickets/ admittance are key barriers to cultural participation for Ontarians. However, an activity not being for someone like them is the top barrier to participation across Ontario.



Ontarians are split on whether they want a cultural activity experience that integrates technology or not. Their preferred experience also varies with the type of activity, with a preference for an analogue experience for benchmark arts and a preference for integrated technology in educational cultural activities such as museums.



Personal commitment and donations to cultural organizations are low when compared to other organizations and philantropic causes with the main barrier to donations being the belief that the taxes they pay already support cultural organizations, followed by not being asked. Breaking down these barriers could help bring more donations to cultural organizations.



Ontarians see community as an important factor when they decide to donate to cultural organizations. In fact, top motivators of donations to cultural organization for Ontarians include valuing the impact it has on the local community and wanting to give back to the community.



Methodology

Methodology

On behalf of Business for the Arts, Nanos Research conducted an online survey of 1,012 Ontario residents who have participated in a cultural activity in the last 12 months, 18 years of age or older, between December 21st, 2017 and January 11th, 2018. This was part of a larger national study of 6,400 Canadians who participated in a cultural activity in the last 12 months, 18 years of age or older, between December 21st, 2017 and January 11th, 2018.

The questionnaire for the study drew upon the Culture Track tracking study but was tailored to the Canadian cultural market.

To be comparable with the US study, Nanos used a non-probability panel of Canadians in Ontario to recruit participants and therefore a tradition margin of error for probability research should not be applied to the research.

Sampling

Sub Regions*	Weighted respondent proportions	Number of respondents
East	110	103
North	53	76
Central	80	101
South Central	256	250
Toronto	236	230
Southwest	265	252
Ontario (Total)	1000	1012

	2016 Census Population Estimate	Proportion (for weighting purposes)
East	1,763,186	13%
North	780,140	6%
Central	1,081,280	8%
South Central	3,685,945	27%
Toronto	2,731,571	20%
Southwest	3,406,372	25%
Ontario (Total)	13,448,494	100%

*National statistics have been weighted to their true population proportion to be representative of the geographic distribution of Ontario

About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



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