Culture-goers increasingly optimistic for in-person activities

Arts Response Tracking Study – Wave 4

Conducted by Nanos for Business / Arts, released March 2021 Submission 2020-1815









Arts Response Tracking Study



The Arts Response Tracking Study is a regular monitor of the environment in the arts and culture sector.

The study focuses on culture-goers who have attended an indoor cultural gathering, an outdoor cultural gathering or a gallery or museum in the 12-month period prior to the COVID-19 pandemic.

This fourth report contains information on the sentiment of Canadian culture-goers, namely:

- Tracking on when culture-goers plan to return to in-person performances and exhibitions;
- Tracking on what precautions are required to make culture-goers comfortable in returning;
- Current and future methods of consuming cultural content; and,
- Valuable aspects of participating in virtual and in-person cultural activities.

The study was sponsored by Business / Arts and the National Art Centre, the Funding Arts Partner for this project.

Returning to in-person events











Plan to return immediately to museums



There has been an increase in culture-goers who report that they plan on returning immediately to cultural events once businesses and organizations are reopened and following health guidelines.

Importance of Vaccines



Culture-goers who plan on returning immediately/have already returned increasingly mention a vaccine as a precaution for early return to inperson arts/cultural performances and exhibitions



31% of museum culture goers (20% in November) who plan to attend immediately or have already returned say they want a vaccine to make them feel more comfortable to attend museums.

44% of indoor culture goers (28% in November) who plan to attend immediately or have already returned say they want a vaccine to make them feel more comfortable to attend in-person indoor performances.

Consuming cultural content during and after the pandemic



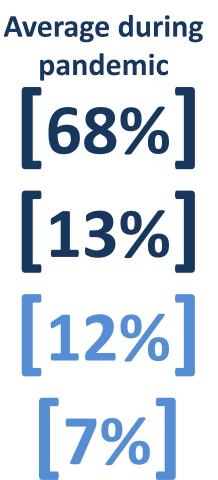
*Numbers may not add up to 100 due to rounding.

Online - Free

Online - Paid

In-person - Free

In-person - Paid



Average after the pandemic **[27%]** 7% 30% 37%

Culture-goers plan on increasing the average percentage of time they will spend consuming content in person after the pandemic.

Question - Thinking of all the time you spent during the pandemic consuming content from an arts or cultural organization, what is the percentage of time you have spent consuming content in person versus online?





Virtual participation

- Entertainment/the ability to still enjoy an event > 22 %
- Accessibility and convenience > 20 %
- Education/learning new things > 7 %
- Social interaction/a way to stay connected > 7%
- No value > 20%

In-person participation

- Social interaction/sense of community > 32 %
- The entire experience/it's more engaging > 29 %
- The ambience/ atmopshere > 11 %
- Learning new things > 3%
- No value > 4%



Culture-goers value the entertainment and the ability to still enjoy events in virtual activities along with accessibility and availability of programming

About one in five culture goers mention being entertained and the ability to still enjoy events (22%) as what they value most in participating in virtual cultural activities, followed by the accessibility and availability of activities (20%).



Culture-goers value the social interactions and the sense of community in in-person cultural activities

Culture-goers mention the social interactions and the sense of community (32%) as what they value most in participating in in-person activities, followed by enjoying the entire experience and that it is more engaging (29%).



Culture-goers plan on returning to in-person events once the pandemic is done and it is safe to go to any event, while still viewing free online content

Culture-goers report viewing the majority of the content they consumed during the pandemic from arts and cultural organizations online (average of 68% online and free, 13% online and paid), and they expect to shift this consumption of cultural content to in-person content once the pandemic is done (30% in-person free, 37% in person paid), while still spending about one fourth of their time consuming free content online (27%).



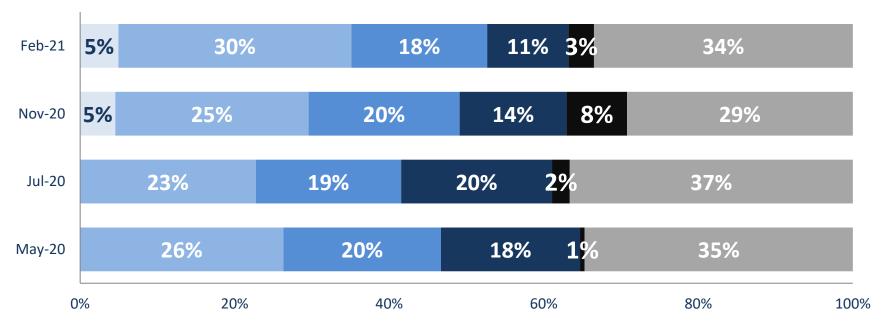
Culture-goers are increasingly more likely to say they plan on returning to activities immediately once organizations are open

Culture goers are increasingly more likely to report that they plan to return to in-person activities immediately once businesses and organizations are reopened and following health guidelines, whether it be indoor events (30%, 25% in November), outdoor events (42%, 33% in November) or museums (34%, 26% in November).

O NANOS RESEARCH

Expected timeline of indoor culture-goers to attend INDOOR arts/cultural performances





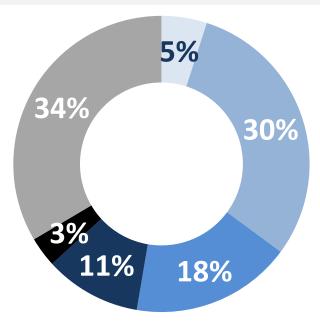
- I have attended an indoor arts or cultural performance since the pandemic
- Immediately after businesses, government and cultural organizations are reopened and following public health guidelines
- 1 to 5 months after businesses, government and cultural organisations are reopened and following public health guidelines
- 6 months or longer after businesses, government and cultural organisations are reopened and following public health guidelines
- Never
- Not sure

QUESTION – [TRACKING-UPDATED NOV 2020] Have you attended or when do you plan to attend, in person, an INDOOR arts or cultural performance?

[QUESTION IN MAY and JULY 2020 WAVES] When do you plan to attend, in person, an INDOOR arts or cultural performance? ____ months after businesses, government and cultural organizations are reopened and following public health guidelines

Expected timeline of indoor culture-goers to attend INDOOR arts/cultural performances





- I have attended an indoor arts or cultural performance since the pandemic
- Immediately after businesses, government and cultural organizations are reopened and following public health guidelines
- 1 to 5 months after businesses, government and cultural organizations are reopened and following public health guidelines
- 6 months or longer after businesses, government and cultural organizations are reopened and following public health guidelines
- Never
- Not sure

- *Weighted to the true population proportion.
- *Charts may not add up to 100 due to rounding.

QUESTION – Have you attended or when do you plan to attend, in person, an INDOOR arts or cultural performance? months after businesses, government and cultural organizations are reopened and following public health guidelines

© NANOS RESEARCH

Expected timeline of indoor culture-goers to attend INDOOR arts/cultural performances — By region





	Indoor Culture- goers (n=597)	Atlantic (n=59)	Quebec (n=85)	Ontario (n=224)	Prairies (n=134)	British Columbia (n=95)
Have already attended	5.0%	8.6%	10.4%	2.1%	6.6%	3.6%
Immediately	30.2%	34.0%	31.7%	25.3%	34.0%	36.3%
1-5 months	17.6%	7.2%	17.7%	19.9%	15.3%	18.6%
6 months or more	10.5%	10.3%	11.8%	13.4%	4.5%	8.7%
Never	3.3%	4.8%	2.2%	4.3%	3.8%	-
Not sure	33.5%	35.1%	26.3%	35.0%	35.8%	32.8%

^{*}small sample size

QUESTION – Have you attended or when do you plan to attend, in person, an INDOOR arts or cultural performance? months after businesses, government and cultural organizations are reopened and following public health guidelines

© NANOS RESEARCH

Expected timeline of indoor culture-goers to attend INDOOR arts/cultural performances — By age and gender





	Indoor Culture- goers (n=597)	Men (n=322)	Women (n=275)	18 to 34 (n=127)	35 to 54 (n=254)	55 plus (n=216)
Have already attended	5.0%	5.2%	4.7%	4.2%	4.2%	6.2%
Immediately	30.2%	33.1%	27.5%	34.3%	26.5%	30.5%
1-5 months	17.6%	20.1%	15.4%	12.6%	17.5%	21.4%
6 months or more	10.5%	10.5%	10.6%	8.0%	17.6%	5.6%
Never	3.3%	2.9%	3.7%	4.7%	1.9%	3.6%
Not sure	33.5%	28.2%	38.2%	36.2%	32.2%	32.7%

QUESTION – Have you attended or when do you plan to attend, in person, an INDOOR arts or cultural performance? months after businesses, government and cultural organizations are reopened and following public health guidelines

Precautions needed to feel comfortable attending INDOOR arts/cultural performances





Top mentions

Indoor culture-goers that ALREADY ATTENDED/plan to attend IMMEDIATELY after businesses, are reopened and following public health guidelines

	February 2021 (n=185)	November 2020** (n=179)	July 2020 (n=135)	May 2020 (n=151)
Vaccine	43.8%	27.8%	18.6%	12.0%
Social/physical distancing (spacing between seats)	25.4%	36.4%	34.8%	31.5%
Masks	24.2%	34.9%	39.6%	26.7%
None	14.1%	5.8%	7.8%	16.3%
Following medical/ government guidelines	13.5%	11.6%	11.4%	14.0%
Hand sanitizer/handwashing	6.5%	5.5%	5.8%	16.4%
Fewer cases	6.0%	5.8%	9.9%	2.3%
Cleaning protocols	3.8%	10.0%	13.2%	11.2%
No cases/eradication of COVID-19	3.8%	6.2%	0.9%	3.1%

^{**}The November and February waves included culture goers that have already attended or plan to attend immediately.

QUESTION - [REPORTING ON ONLY THOSE WHO HAVE ATTENDED AN INDOOR ACTIVITY] What are the precautions that need to occur to make you comfortable to attend an INDOOR arts or cultural performance? [OPEN] *Based on up to three mentions

Precautions needed to feel comfortable attending INDOOR arts/cultural performances

Indoor culture-goers that plan to





Top mentions	busi	end 1 TO 5 nesses, are ing public	e reopened	l and	busi	6 MONTH nesses, are ing public	reopened	l and	Indo
	Feb 2021 (n=99)			•				May 2020 (n=110)	

oor culture-goers who are unsure

	TOllow	ing public	nealth guid	delines	TOIIOW	following public health guidelines						
	Feb 2021 (n=99)	Nov 2020 (n=114)	July 2020 (n=115)	May 2020 (n=121)	Feb 2021 (n=63)	Nov 2020 (n=89)	July 2020 (n=119)	May 2020 (n=110)	Feb 2021 (n=161)	Nov 2020 (n=168)	July 2020 (n=224)	May 2020 (n=217)
Vaccine	59.6%	46.1%	27.5%	22.7%	56.1%	59.8%	52.3%	44.2%	51.9%	45.3%	40.1%	37.0%
Masks	24.2%	27.4%	43.0%	29.4%	32.0%	16.5%	28.8%	24.0%	21.8%	12.0%	26.2%	13.3%
Social/physical distancing (spacing between seats)	22.6%	31.0%	35.5%	42.2%	20.6%	11.1%	28.5%	31.9%	19.6%	18.2%	24.8%	26.6%
No Cases/eradication of Covid-19	8.2%	13.6%	9.7%	2.2%	14.1%	22.0%	16.3%	10.4%	9.9%	17.3%	8.1%	9.9%
Following medical/ government guidelines	5.3%	7.6%	6.5%	7.9%	1.3%	3.7%	2.6%	2.0%	11.6%	7.7%	4.5%	7.9%
Cleaning protocols	4.8%	3.9%	12.0%	14.4%	8.4%	5.8%	5.4%	8.5%	3.6%	3.7%	8.1%	10.0%
Hand sanitizer/handwashing	1.7%	4.8%	5.2%	17.5%	4.8%	0.9%	3.5%	7.4%	3.8%	5.5%	3.1%	3.8%
Unsure	-	1.1%	5.1%	-	-	0.7%	1.7%	1.2%	1.3%	3.8%	4.7%	2.5%
Based on multiple mentions QUESTION — [REPORTIN	IG ON ONI						-		•		eed to oc	cur to

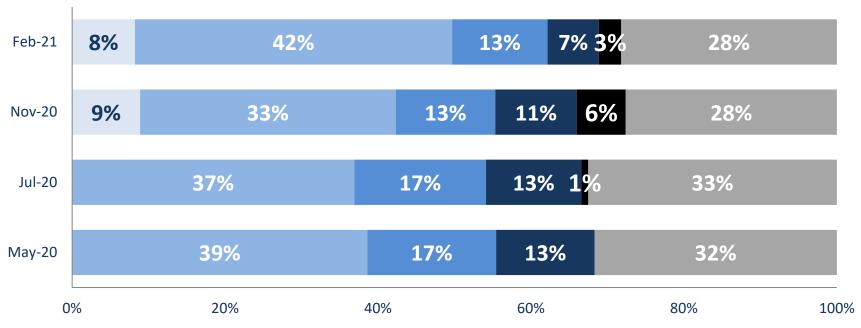
Indoor culture-goers that plan to

QUESTION - [REPORTING ON ONLY THOSE WHO HAVE ATTENDED AN INDOOR ACTIVITY] What are the precautions that need to occur to make you comfortable to attend an INDOOR arts or cultural performance? [OPEN] *Based on up to three mentions

^{*}Based on multiple mentions.

Expected timeline of outdoor culture-goers to attend OUTDOOR arts/cultural performances





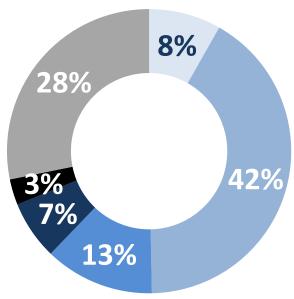
- I have attended an outdoor arts or cultural performance since the pandemic
- Immediately after businesses, government and cultural organizations are reopened and following public health guidelines
- 1 to 5 months after businesses, government and cultural organisations are reopened and following public health guidelines
- 6 months or longer after businesses, government and cultural organisations are reopened and following public health guidelines
- Never
- Not sure

QUESTION – [TRACKING-UPDATED NOV 2020] Have you attended or when do you plan to attend, in person, an OUTDOOR arts or cultural performance?

[QUESTION IN MAY and JULY 2020 WAVES] When do you plan to attend, in person, an OUTDOOR arts or cultural performance? ____ months after businesses, government and cultural organizations are reopened and following public health guidelines

Expected timeline of outdoor culture-goers to attend OUTDOOR arts/cultural performances





- I have attended an outdoor arts or cultural performance since the pandemic
- Immediately after businesses, government and cultural organizations are reopened and following public health guidelines
- 1 to 5 months after businesses, government and cultural organizations are reopened and following public health guidelines
- 6 months or longer after businesses, government and cultural organizations are reopened and following public health guidelines
- Never
- Not sure

- *Weighted to the true population proportion.
- *Charts may not add up to 100 due to rounding.

QUESTION – Have you attended or when do you plan to attend, in person, an OUTDOOR arts or cultural performance? months after businesses, government and cultural organizations are reopened and following public health guidelines

NAMOS RESEARCH

Expected timeline of outdoor culture-goers to attend OUTDOOR arts/cultural performances — By region



	Outdoor Culture- goers (n=385)	Atlantic (n=33)	Quebec (n=64)	Ontario (n=141)	Prairies (n=79)	British Columbia (n=68)
Have already attended	8.2%	14.1%	4.7%	4.0%	17.4%	10.9%
Immediately	41.5%	42.1%	36.4%	37.1%	42.5%	58.5%
1-5 months	12.5%	6.9%	18.1%	12.9%	10.1%	9.9%
6 months or more	6.7%	-	7.5%	10.0%	2.5%	4.0%
Never	2.9%	-	5.7%	3.4%	2.5%	-
Not sure	28.2%	36.9%	27.5%	32.6%	25.0%	16.8%

^{*}small sample size

QUESTION – Have you attended or when do you plan to attend, in person, an OUTDOOR arts or cultural performance? months after businesses, government and cultural organizations are reopened and following public health guidelines

NANOS RESEARCH

Expected timeline of outdoor culture-goers to attend OUTDOOR arts/cultural performances — By age and gender





	Outdoor Culture- goers (n=385)	Men (n=192)	Women (n=193)	18 to 34 (n=80)	35 to 54 (n=175)	55 plus (n=130)
Have already attended	8.2%	7.5%	8.7%	6.8%	8.9%	8.6%
Immediately	41.5%	47.9%	36.8%	46.7%	37.7%	41.3%
1-5 months	12.5%	14.5%	11.0%	8.0%	12.7%	15.9%
6 months or more	6.7%	7.8%	5.9%	3.9%	11.5%	3.7%
Never	2.9%	3.6%	2.4%	5.7%	1.7%	2.0%
Not sure	28.2%	18.7%	35.1%	28.9%	27.4%	28.4%

QUESTION – Have you attended or when do you plan to attend, in person, an OUTDOOR arts or cultural performance? ____ months after businesses, government and cultural organizations are reopened and following public health guidelines

NANOS RESEARCH

Precautions needed to feel comfortable attending OUTDOOR arts/cultural performances



Outdoor culture-goers who ALREADY ATTENDED/plan to attend IMMEDIATELY after businesses, are reopened and following public health guidelines

Top mentions	February 2021** (n=164)	November 2020** (n=140)	July 2020 (n=140)	May 2020 (n=140)
Social/physical distancing	36.6%	41.1%	55.0%	46.5%
Vaccine	28.8%	22.8%	6.3%	4.5%
Masks	21.6%	37.7%	37.6%	25.1%
None	18.0%	5.3%	10.4%	12.0%
Following medical/ government guidelines	16.1%	11.1%	7.8%	7.1%
Smaller events/capacity	4.5%	9.7%	3.4%	9.7%
Fewer cases	3.3%	5.4%	5.5%	0.5%
Sanitizer/hand washing	1.8%	11.2%	8.7%	22.2%
Unsure	0.5%	-	2.4%	0.5%

^{**}The November and February waves included culture goers that have already attended or plan to attend immediately.

QUESTION – [REPORTING ON ONLY THOSE WHO ATTENDED OUTDOOR ARTS/CULTURAL PERFORMANCES] What are the precautions that need to occur to make you comfortable to attend an OUTDOOR arts or cultural performance? [OPEN] *Based on up to three mentions

Precautions needed to feel comfortable attending OUTDOOR arts/cultural performances





*small sample size

Outdoor culture-goers plan to attend 1 TO 5 MONTHS after businesses, are reopened and following public health guidelines

Outdoor culture-goers plan to attend 6 **MONTHS OR MORE after businesses,** are reopened and following public health guidelines

Outdoor culture-goers who are unsure

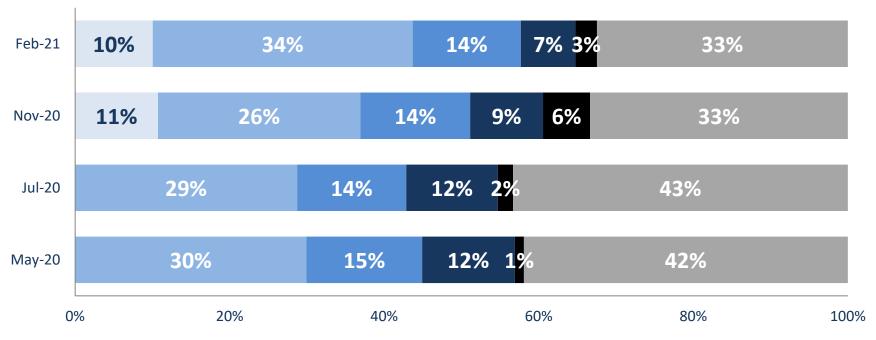
		8				0						
Top mentions	Feb 2021 (n=43)*	Nov 2020 (n=49)*	July 2020 (n=70)*	May 2020 (n=72)*	Feb 2021 (n=22)*	Nov 2020 (n=38)*	July 2020 (n=46)*	May 2020 (n=49)*	Feb 2021 (n=79)	Nov 2020 (n=88)*	July 2020 (n=123)	May 2020 (n=123)
Vaccine	48.2%	44.0%	15.0%	15.9%		60.5%	33.9%	38.5%	42.2%	42.1%	22.6%	27.4%
Social/physical distancing	31.7%	35.5%	57.8%	53.0%		25.9%	39.3%	36.8%	34.6%	24.3%	50.3%	29.9%
Masks	20.9%	32.8%	44.4%	23.1%		7.1%	22.8%	25.8%	21.7%	19.7%	34.7%	13.2%
No Cases/eradication of Covid-19	10.2%	12.5%	7.7%	2.2%		12.1%	14.8%	13.4%	7.1%	10.7%	8.3%	9.0%
Fewer cases	9.6%	7.1%	4.4%	8.9%		5.6%	9.3%	1.5%	9.3%	8.7%	1.5%	7.7%
Following medical/ government guidelines	5.5%	7.6%	7.4%	5.8%		5.4%	5.5%	2.5%	8.3%	10.4%	6.2%	9.6%
Sanitizer/hand washing	-	2.5%	10.6%	12.1%		-	2.0%	-	-	1.4%	7.6%	7.8%
Smaller events/capacity	-	2.0%	8.1%	11.4%		2.0%	5.5%	5.7%	12.8%	9.9%	10.8%	7.2%

QUESTION - [REPORTING ON ONLY THOSE WHO ATTENDED OUTDOOR ARTS/CULTURAL PERFORMANCES] What are the precautions that need to occur to make you comfortable to attend an OUTDOOR arts or cultural performance? [OPEN] *Based on up to three mentions

NANOS RESEARCH

Expected timeline of culture-goers to attend art galleries and museums





- I have attended an art gallery or museum since the pandemic
- Immediately after businesses, government and cultural organizations are reopened and following public health guidelines
- 1 to 5 months after businesses, government and cultural organisations are reopened and following public health guidelines
- 6 months or longer after businesses, government and cultural organisations are reopened and following public health guidelines
- Never
- Not sure

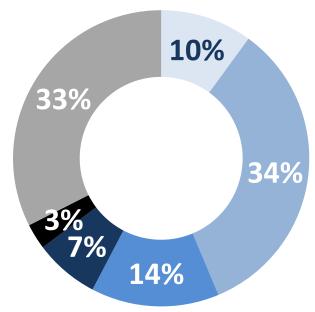
QUESTION - [TRACKING-UPDATED NOV 2020] Have you attended or when do you plan to attend, in person, an art gallery or museum?

[QUESTION IN MAY and JULY 2020 WAVES] When do you plan to attend, in person, an art gallery or museum?____ months after businesses, government and cultural organizations are reopened and following public health guidelines

Expected timeline of culture-goers to attend art galleries and museums







- I have visited a museum or art gallery since the pandemic
- Immediately after businesses, government and cultural organizations are reopened and following public health guidelines
- 1 to 5 months after businesses, government and cultural organizations are reopened and following public health guidelines
- 6 months or longer after businesses, government and cultural organizations are reopened and following public health guidelines
- Never
- Not sure

- *Weighted to the true population proportion.
- *Charts may not add up to 100 due to rounding.

QUESTION – Have you attended or when do you plan to attend, in person, an art gallery or museum? ___months after businesses, government and cultural organizations are reopened and following public health guidelines

IANOS RESEARCH

Expected timeline of culture-goers to attend art galleries and museums – By region



	Musuem Culture- goers (n=512)	Atlantic (n=46)	Quebec (n=76)	Ontario (n=185)	Prairies (n=11)	British Columbia (n=94)
Have already attended	10.0%	12.2%	13.0%	6.9%	6.8%	18.8%
Immediately	33.6%	33.4%	39.6%	28.2%	35.6%	40.1%
1-5 months	14.0%	9.8%	11.7%	18.3%	12.1%	8.5%
6 months or more	7.1%	5.5%	9.9%	6.7%	6.5%	6.4%
Never	2.8%	6.7%	2.5%	2.0%	3.7%	2.7%
Not sure *small sample siz	32.5%	32.5%	23.4%	38.0%	35.3%	23.6%

^{*}small sample size

QUESTION – Have you attended or when do you plan to attend, in person, an art gallery or museum? ____months after businesses, government and cultural organizations are reopened and following public health guidelines

JANOS RESEARCH

Expected timeline of culture-goers to attend art galleries and museums – By age and gender





	Museum Culture- goers (n=512)	Men (n=278)	Women (n=234)	18 to 34 (n=112)	35 to 54 (n=200)	55 plus (n=200)
Have already attended	10.0%	6.9%	12.8%	10.5%	10.4%	9.4%
Immediately	33.6%	35.6%	31.9%	36.6%	29.0%	35.4%
1-5 months	14.0%	15.2%	12.9%	10.5%	11.7%	18.5%
6 months or more	7.1%	8.2%	6.1%	2.9%	11.0%	6.8%
Never	2.8%	4.1%	1.7%	3.1%	1.8%	3.4%
Not sure	32.5%	30.0%	34.6%	36.5%	36.0%	26.5%

QUESTION – Have you attended or when do you plan to attend, in person, an art gallery or museum? ___months after businesses, government and cultural organizations are reopened and following public health guidelines

NANOS RESEARCH

Precautions needed to feel comfortable attending museums or art galleries



Top mentions

Gallery and museum culture-goers who ALREADY ATTENDED/plan to attend IMMEDIATELY after businesses, are reopened and following public health guidelines

	February 2021** (n=169)	November 2020** (n=143)	July 2020 (n=125)	May 2020 (n=127)
Masks	31.5%	45.9%	53.9%	23.5%
Vaccine	31.1%	20.2%	8.1%	4.5%
Social/physical distancing	29.1%	43.1%	42.3%	45.4%
Smaller capacity/events	17.5%	22.4%	13.6%	10.3%
Medical/government guidelines	13.9%	13.2%	7.0%	9.5%
None	9.9%	3.9%	11.6%	14.5%
Sanitizer/handwashing	3.7%	9.1%	11.1%	15.2%
Proper ventilation	3.3%	7.3%	4.4%	5.2%
Cleaning protocols	1.6%	5.3%	9.6%	8.7%

^{**}The November and February wave included culture goers that have already attended or plan to attend immediately.

QUESTION – [REPORTING ON ONLY THOSE WHO PLAN TO ATTEND MUSEUMS OR ART GALLERIES] What are the precautions that need to occur to make you comfortable to visit an art gallery or museum? [OPEN] *Based on up to three mentions

Precautions needed to feel comfortable attending museums or art galleries





Top mentions

Gallery and museum culture-goers plan to attend 1 TO 5 MONTHS after businesses, are reopened and following public health guidelines

Gallery and museum culture-goers plan to attend 6 MONTHS OR MORE after businesses, are reopened and following public health guidelines

Gallery and museum culture-goers who are unsure

	Feb 2021 (n=63)*	Nov 2020 (n=53)*	July 2020 (n=69)*	May 2020 (n=61)*	Feb 2021 (n=37)*	Nov 2020 (n=41)*	July 2020 (n=51)*	May 2020 (n=53)*		Nov 2020 (n=129)	July 2020 (n=180)	May 2020 (n=181)
Vaccine	48.9%	34.6%	15.1%	8.8%	48.5%	61.9%	29.4%	50.9%	45.0%	43.8%	31.5%	20.7%
Social/physical distancing	25.9%	34.0%	41.7%	53.2%	14.3%	16.0%	36.1%	33.0%	22.0%	22.6%	36.3%	36.5%
Masks	24.6%	37.0%	55.4%	36.8%	17.5%	18.6%	28.8%	24.5%	21.9%	21.6%	32.5%	19.2%
Smaller capacity/events	10.7%	19.4%	25.5%	8.6%	17.2%	10.3%	8.9%	2.8%	10.9%	11.8%	9.4%	6.2%
No cases	5.9%	12.9%	2.8%	8.7%	9.3%	16.6%	18.3%	6.0%	6.3%	9.1%	6.7%	8.0%
Proper ventilation	5.6%	5.0%	0.9%	11.3%	4.1%	3.8%	3.2%	3.1%	5.4%	2.2%	4.8%	1.1%
Medical/government guidelines	1.9%	11.1%	7.2%	7.4%	5.5%	8.8%	1.7%	6.0%	5.0%	5.3%	5.6%	6.9%
Sanitizer/handwashing	1.5%	9.1%	7.6%	9.6%	5.3%	5.0%	4.6%	4.9%	4.8%	7.1%	4.0%	6.4%

^{*}small sample size

QUESTION – [REPORTING ON ONLY THOSE WHO PLAN TO ATTEND MUSEUMS OR ART GALLERIES] What are the precautions that need to occur to make you comfortable to visit an art gallery or museum? [OPEN] *Based on up to three mentions

NANOS RESEARCH

Consuming arts and cultural content during the pandemic



During the Pandemic	In person - Free	In person – Paid	Online – Free	Online - Paid
Average	12.1%	6.6%	68.0%	13.3%
After the Pandemic	In person - Free	In person – Paid	Online – Free	Online - Paid
Average	29.6%	36.7%	26.6%	7.1%

QUESTION – Thinking of all the time you spent during the pandemic consuming content from an arts or cultural organization, what is the percentage of time you have spent consuming content in person versus online?

Once the pandemic has ended and it is safe to go to any event, what is the percentage of time you expect to spend consuming content directly from an arts or cultural organization in person versus online?

Value of virtual activities





	Culture-goers (n=624)
The ability to still enjoy an event/entertainement	21.5%
Nothing/I do not participate in online activities/Do not value it	19.9%
Accessible/convenient (can pause perfomances and/or watch from home)	19.9%
Educational/learn new things	7.4%
Social interaction/a way to stay connected	6.5%
More variety/options	5.4%
The event can originate from anywhere in the world/experiencing different cultures	5.4%
Supporting artists	3.1%
Video/sound quality	2.9%
Safety with regards to the pandemic	2.6%
Free/low prices	1.3%
Other	3.3%
Unsure	0.9%

QUESTION – What do you value most, if anything, about participating in a cultural activity online? [OPEN]

Value of in-person activities





	Culture-goers (n=641)
Social interaction/sense of community	31.6%
The entire experience/it's more engaging	29.0%
Ambience/atmopshere	11.2%
Nothing/I do not participate in in-person activities/Do not value it	3.9%
Learning new things	3.3%
Entertainement value	3.0%
Experiencing different cultures	2.3%
Live music	2.1%
Being part of a crowd/crowd reaction	1.8%
The quality of performances	1.8%
Getting out of the house	1.4%
Supporting artists	1.3%
Other	6.7%
Unsure	0.7%

QUESTION – What do you value most, if anything, about participating in a cultural activity in person? [OPEN]

/ IVAING

Screening questions

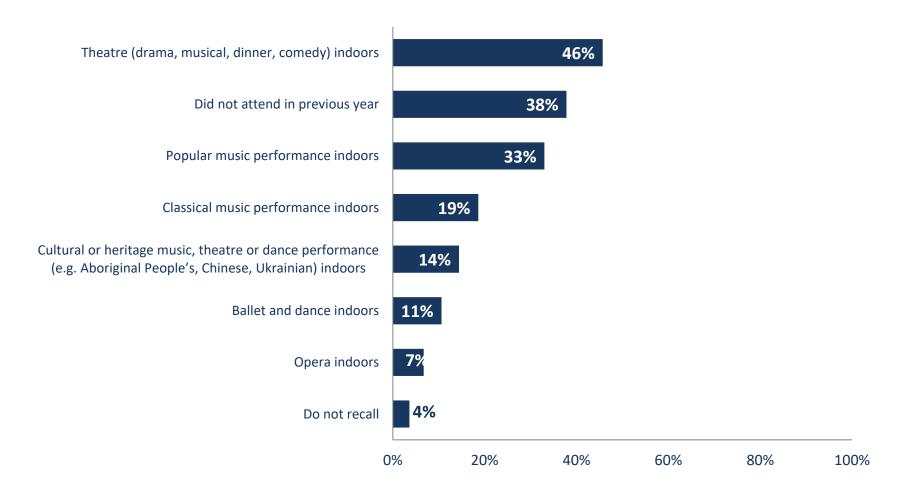


The following slides present the screening questions used to classify respondents as culture goers:

- An indoor culture-goer is a respondent who reported attending at least one indoor activity in the past 12 months prior to Covid.
- An outdoor culture-goer is a respondent who reported attending at least one outdoor activity in the past 12 months prior to Covid
- A museum culture-goer is a respondent who reported attending at least one museum in the past 12 months prior to Covid

Attendance to INDOOR Cultural Gatherings – Before COVID-19

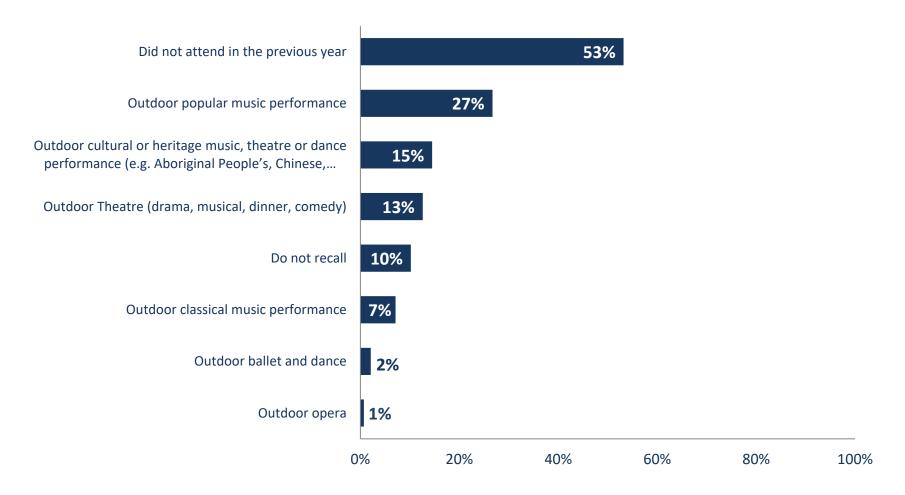




QUESTION – Did you attend any of the following INDOOR cultural gatherings in the 12-months before the COVID-19 outbreak? [RANDOMIZE](select all that apply)

Attendance to OUTDOOR Cultural Gatherings before COVID-19

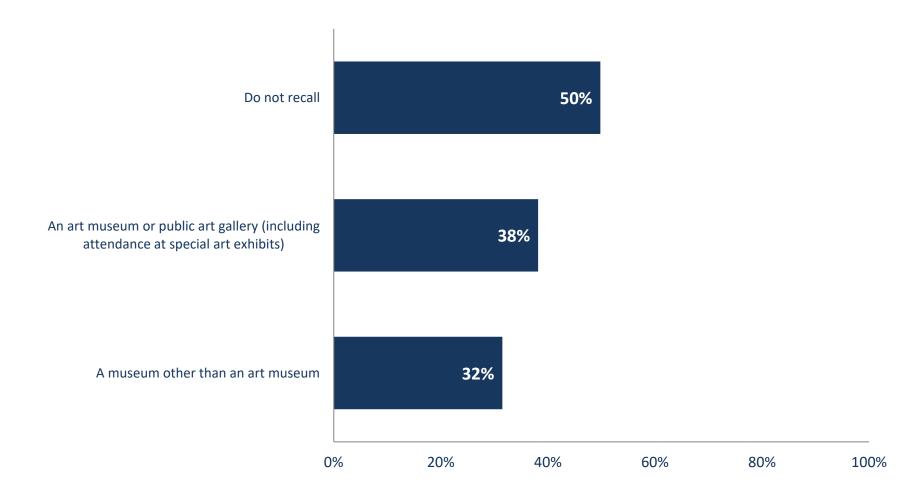




QUESTION – Did you attend any of the following OUTDOOR cultural gatherings in the 12-months before the COVID-19 outbreak? [RANDOMIZE](select all that apply)

Attendance to art galleries and museums before COVID-19





QUESTION – Did you attend any of the following in the 12-months before the COVID-19 outbreak? [RANDOMIZE] (select all that apply)

NANOS RESEARCH

METHODOLOGY





\widehat{p} nanos

METHODOLOGY - February 2021 Wave



Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1016 Canadians, 18 years of age or older, between February 28th to March 4th, 2021 as part of an omnibus survey. The findings in this report pertain to culture-goers who have attended indoor or outdoor cultural performances or art galleries and museums in the 12-month period prior to the COVID-19 pandemic. Individual n-values for the subgroups are reported on their respective slides.

Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada. Please note that for the questions related to precautions the first three mentions of respondents were used for the analysis.

Individuals were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for this survey is ± 3.1 percentage points, 19 times out of 20.

The research was commissioned by Business / Arts and the National Arts Centre, founding arts partners and was conducted by Nanos Research.

Note: Charts may not add up to 100 due to rounding.

METHODOLOGY - November 2020 Wave



Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1096 Canadians, 18 years of age or older, between November 26th and 29th, 2020 as part of an omnibus survey. The findings in this report pertain to culture-goers who have attended indoor or outdoor cultural performances or art galleries and museums in the 12-month period prior to the COVID-19 pandemic. Individual n-values for the subgroups are reported on their respective slides.

Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada. Please note that for the questions related to precautions the first three mentions of respondents were used for the analysis.

Individuals were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for this survey is ± 3.0 percentage points, 19 times out of 20.

The research was commissioned by Business / Arts and the National Arts Centre, founding arts partners and was conducted by Nanos Research.

Note: Charts may not add up to 100 due to rounding.

NANOS RESEARCH

METHODOLOGY - July 2020 Wave



Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1094 Canadians, 18 years of age or older, between July 26th and 30th, 2020 as part of an omnibus survey. The findings in this report pertain to culture-goers who have attended indoor or outdoor cultural performances or art galleries and museums in the 12-month period prior to the COVID-19 pandemic. Individual n-values for the subgroups are reported on their respective slides. Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada. Please note that for the questions related to precautions the first three mentions of respondents were used for the analysis.

Individuals were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for this survey is ± 3.1 percentage points, 19 times out of 20.

The research was commissioned by Business / Arts and the National Arts Centre, founding arts partners and was conducted by Nanos Research.

Note: Charts may not add up to 100 due to rounding.

m NANOS

METHODOLOGY - May 2020 Wave



Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,001 Canadians, 18 years of age or older, between May 17th and 19th, 2020 as part of an omnibus survey. The findings in this report pertain to culture-goers who have attended indoor or outdoor cultural performances or art galleries and museums in the 12-month period prior to the COVID-19 pandemic. Individual n-values for the subgroups are reported on their respective slides. Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada. Please note that for the questions related to precautions the first three mentions of respondents were used for the analysis.

Individuals were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for this survey is ± 3.1 percentage points, 19 times out of 20.

The research was commissioned by Business / Arts and the National Arts Centre, founding arts partners and was conducted by Nanos Research.

Note: Charts may not add up to 100 due to rounding.

TECHNICAL NOTE





Element	Description	Element	Description
Research sponsor	Business / Arts and the National Arts Centre, founding arts partner	Weighting of Data	The results were weighted by age and gender using the latest Census information (2016) and the sample is geographically
Population and Final Sample Size	1016 Randomly selected individuals.	Weighting of Data	stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Source of Sample	Nanos Panel	Scrooning	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media
Type of Sample	Probability	Screening	or a political party prior to administering the survey to ensure the integrity of the data.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Excluded	Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Demographics	participate.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Stratification	By age and gender using the latest Census information (2016) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Estimated Response Rate	Fourteen percent, consistent with industry norms.
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online	Question Order	Question order in the following tabulations reflects the order in which they appeared in the original questionnaire.
Number of Calls	Maximum of five call backs to those recruited.	0 11 0 1 1	Topics on the omnibus ahead of the survey content included: views
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Question Content	on political issues, views on economic issues, views on China and views on the Covid-19 vaccine.
Field Dates	February 28 th to March 4 th , 2021	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Language of Survey	The survey was conducted in both English and French.	Research/Data Collection Supplier	Nanos Research
Standards	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. https://canadianresearchinsightscouncil.ca/standards/	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com.

ABOUT NANOS





As one of North America's premier market and public opinion research firms, we put strategic intelligence into the hands of decision makers. The majority of our work is for private sector and public facing organizations and ranges from market studies, managing reputation through to leveraging data intelligence. Nanos Research offers a vertically integrated full service quantitative and qualitative research practice to attain the highest standards and the greatest control over the research process. www.nanos.co

nanos dimap analytika



dimap

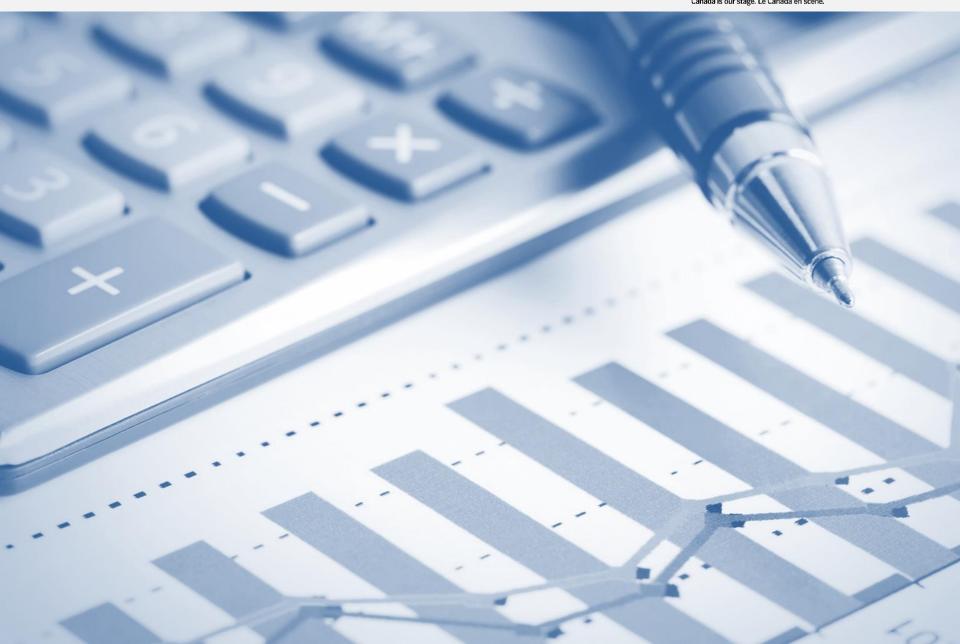
This international joint venture between <u>dimap</u> and <u>Nanos</u> brings together top research and data experts from North American and Europe to deliver exceptional data intelligence to clients. The team offers data intelligence services ranging from demographic and sentiment microtargeting; consumer sentiment identification and decision conversion; and, data analytics and profiling for consumer persuasion. www.nanosdimap.com

NANOS RUTHERFORD McKAY & Co.

NRM is an affiliate of Nanos Research and Rutherford McKay Associates. Our service offerings are based on decades of professional experience and extensive research and include public acceptance and engagement, communications audits, and narrative development. www.nrmpublicaffairs.com

TABULATIONS







Please note that the following sub-samples are presented in these tabulations: indoor culture-goers refers to Canadians who reported participating in at least one indoor cultural or arts performances in the 12 months prior to the Covid-19 outbreak, and art gallery and museum culture-goers refers to Canadians who reported participating in an art gallery or other type of museum in the 12 months prior to the Covid-19 outbreak.

[This table reports on the views of all Canadians]

					Reg	gion			Ge	nder		Age	
			Canada					British					
			2021-03	Atlantic	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Did you attend any of the	Total*	Unwgt N	1016	100	206	341	212	157	576	440	215	416	385
following INDOOR cultural gatherings in		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
the 12-months before the COVID-19	Opera indoors	%	6.7	2.0	4.7	8.3	7.6	6.9	4.8	8.6	5.2	5.5	8.9
outbreak? [RANDOMIZE] (select	Ballet and dance indoors	%	10.6	5.4	8.2	13.0	12.0	8.8	7.4	13.7	12.9	9.0	10.4
all that apply) **	Theatre (drama, musical, dinner, comedy) indoors	%	45.7	48.3	26.6	56.0	46.2	47.8	40.8	50.5	46.2	48.6	42.9
	Classical music performance indoors	%	18.6	16.8	11.2	20.9	19.9	24.0	15.6	21.4	14.5	18.2	21.9
	Popular music performance indoors	%	33.0	35.2	21.0	35.2	41.9	34.2	33.5	32.5	33.0	39.0	27.7
	Cultural or heritage music, theatre or dance performance (e.g. Aboriginal People's, Chinese, Ukrainian) indoors	%	14.4	17.7	8.0	12.2	23.6	17.7	14.5	14.3	15.9	16.4	11.6
	Did not attend in previous year	%	37.8	34.0	59.1	29.0	33.0	34.4	40.5	35.2	35.0	36.6	40.9
	Do not recall	%	3.6	6.8	1.7	4.5	4.1	2.5	3.5	3.8	4.9	2.4	3.9

^{*}Values are based on the percentage of positive responses to a specific activity (columns exceed 100%)

^{**}Multifrequency tab based on multiple responses



[This table reports on the views of all Canadians]

					F	Region			Ge	nder		Age	
			Canada 2021- 03	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Did you attend any of the	Total*	Unwgt N	1730	164	290	603	395	278	928	802	352	726	652
following INDOOR cultural gatherings in		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
the 12-months before the COVID-19	Opera indoors	%	3.9	1.2	3.4	4.6	4.0	3.9	3.0	4.8	3.1	3.2	5.3
outbreak? [RANDOMIZE] (select	Ballet and dance indoors	%	6.2	3.2	5.8	7.2	6.4	5.0	4.6	7.6	7.7	5.1	6.2
all that apply) **	Theatre (drama, musical, dinner, comedy) indoors	%	26.8	29.1	19.0	31.3	24.5	27.1	25.4	28.1	27.6	27.7	25.5
	Classical music performance indoors	%	10.9	10.1	8.0	11.7	10.5	13.6	9.7	11.9	8.6	10.4	13.0
	Popular music performance indoors	%	19.3	21.2	14.9	19.7	22.2	19.4	20.9	18.1	19.7	22.2	16.4
	Cultural or heritage music, theatre or dance performance (e.g. Aboriginal People's, Chinese, Ukrainian) indoors	%	8.5	10.7	5.7	6.8	12.5	10.0	9.1	7.9	9.5	9.3	6.9
	Did not attend in previous year	%	22.2	20.5	42.0	16.2	17.5	19.5	25.2	19.5	20.9	20.8	24.3
	Do not recall	%	2.1	4.1	1.2	2.5	2.2	1.4	2.2	2.1	2.9	1.3	2.3

^{*}Values are based on the proportion an activity represents of all activities (columns add up to 100 percent).

^{**}Multifrequency tab based on multiple responses



[This table reports on the views of culture-goers who attended an indoor event in the 12-month period prior to the COVID-19 pandemic.]

		_	Indoor		Reg	gion			Ge	nder		Age	
			Culture- goers	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Have you attended or when do	Total	Unwgt N	597	59	85	224	134	95	322	275	127	254	216
you plan to attend, in person, an INDOOR arts		Wgt N	586	40	92	255	115	84	274	311	164	208	213
or cultural performance?	Have already attended	%	5.0	8.6	10.4	2.1	6.6	3.6	5.2	4.7	4.2	4.2	6.2
months after	Immediately	%	30.2	34.0	31.7	25.3	34.0	36.3	33.1	27.5	34.3	26.5	30.5
businesses, government and cultural	1-5 months	%	17.6	7.2	17.7	19.9	15.3	18.6	20.1	15.4	12.6	17.5	21.4
organizations are reopened and following	6 months or more	%	10.5	10.3	11.8	13.4	4.5	8.7	10.5	10.6	8.0	17.6	5.6
public health guidelines	Never	%	3.3	4.8	2.2	4.3	3.8	0.0	2.9	3.7	4.7	1.9	3.6
	Not sure	%	33.5	35.1	26.3	35.0	35.8	32.8	28.2	38.2	36.2	32.2	32.7



[This table reports on the views of culture-goers who attended an indoor event in the 12-month period prior to the COVID-19 pandemic.]

				When do you plan to attend, in pe	rson, an INDOOR arts or o	cultural performance?	
			Indoor Culture-goers	Already attended/Immediately	Plans to wait	Never	Not sure
Question - What are the precautions that	Total	Unwgt N	521	185	162	13	161
need to occur to make you comfortable to attend an INDOOR arts or cultural		Wgt N	513	178	155	12	168
performance? [OPEN-ENDED]	Social/physical distancing (spacing between seats)	%	22.2	25.4	21.9		19.6
	Masks	%	24.1	24.2	27.1		21.8
	Vaccine	%	50.9	43.8	58.3		51.9
	Following medical/ government guidelines	%	9.8	13.5	3.8		11.6
	Cleaning protocols	%	4.4	3.8	6.1		3.6
	No cases/eradication of COVID-19	%	7.8	3.8	10.4		9.9
	None	%	7.7	14.1	1.6		7.1
	Hand sanitizer/handwashing	%	4.5	6.5	2.9		3.8
	Health Check Screening	%	1.2	0.5	3.0		0.5
	Proper ventilation	%	4.2	3.6	4.9		4.5
	Not interested	%	0.2	0.0	0.0		0.0
	Smaller capacity/smaller events	%	4.1	3.3	4.9		3.8
	Fewer cases	%	10.0	6.0	13.8		10.7
	Other	%	3.0	3.0	4.9		0.9
	Unsure	%	0.8	0.4	0.0		1.3

^{*}Values are based on the percentage of positive responses to a specific precaution (columns exceed 100%). Results include up to three mentions.

^{**}Multifrequency tab based on multiple responses



				When	do you plan to attend, ir	person, an INDOOR art	s or cultural performa	ince?	
			Indoor Culture-	Have already	· ·		6 months or		
			goers	attended	Immediately	1-5 months	more	Never	Not sure
Question - What are the	Total	Unwgt N	521	24	161	99	63	13	161
precautions that need to occur		Wgt N	513	23	155	98	57	12	168
to make you comfortable to attend an INDOOR arts or cultural performance? [OPEN]	Social/physical distancing (spacing between seats)	%	22.2	36.0	23.8	22.6	20.6		19.6
cultural performance: [Of EN]	Masks	%	24.1	44.0	21.3	24.2	32.0		21.8
	Vaccine	%	50.9	26.1	46.5	59.6	56.1		51.9
	Following medical/government guidelines	%	9.8	18.8	12.8	5.3	1.3		11.6
	Cleaning protocols	%	4.4	10.9	2.7	4.8	8.4		3.6
	No cases/eradication of COVID-19	%	7.8	5.1	3.6	8.2	14.1		9.9
	None	%	7.7	10.7	14.6	1.1	2.6		7.1
	Hand sanitizer/handwashing	%	4.5	12.5	5.6	1.7	4.8		3.8
	Health Check Screening	%	1.2	0.0	0.6	3.1	2.8		0.5
	Proper ventilation	%	4.2	16.2	1.7	4.5	5.4		4.5
	Not interested	%	0.2	0.0	0.0	0.0	0.0		0.0
	Smaller capacity/smaller events	%	4.1	15.1	1.6	3.1	7.9		3.8
	Fewer cases	%	10.0	4.0	6.3	13.5	14.3		10.7
	Other	%	3.0	6.7	2.5	6.7	2.0		0.9
	Unsure	%	0.8	0.0	0.5	0.0	0.0		1.3

^{*}Values are based on the percentage of positive responses to a specific precaution (columns exceed 100%). Results include up to three mentions.

^{**}Multifrequency tab based on multiple responses



[This table reports on the views of all Canadians]

					Reg	gion			Ge	nder		Age	
			Canada					British					
			2021-03	Atlantic	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Did you attend any of the	Total	Unwgt N	1016	100	206	341	212	157	576	440	215	416	385
following OUTDOOR cultural gatherings in		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
the 12-months before the COVID-19	Outdoor opera	%	0.7	1.0	0.4	0.9	0.7	0.6	0.5	1.0	0.7	0.2	1.2
outbreak? [RANDOMIZE] (select	Outdoor ballet and dance	%	2.1	1.8	1.7	3.0	0.5	2.3	1.6	2.5	2.7	1.8	1.9
all that apply)	Outdoor Theatre (drama, musical, dinner, comedy)	%	12.6	8.4	11.2	13.5	12.6	14.6	9.7	15.4	10.9	12.1	14.3
	Outdoor classical music performance	%	7.1	5.8	7.7	5.2	7.2	11.9	5.7	8.4	7.5	6.7	7.2
	Outdoor popular music performance	%	26.7	22.9	19.6	30.6	25.7	31.0	24.3	28.9	26.4	32.2	22.0
	Outdoor cultural or heritage music, theatre or dance performance (e.g. Aboriginal People's, Chinese, Ukrainian)	%	14.5	13.6	7.6	18.1	17.3	13.2	11.0	18.0	17.7	16.4	10.7
	Did not attend in the previous year	%	53.2	55.8	65.7	49.3	50.1	45.8	57.6	49.1	49.3	48.3	60.4
	Do not recall	%	10.2	11.6	7.0	9.9	12.1	13.2	12.3	8.2	13.2	10.1	8.1

^{*}Values are based on the percentage of positive responses to a specific activity (columns exceed 100%)

^{**}Multifrequency tab based on multiple responses



[This table reports on the views of all Canadians]

					Reg	gion			Ge	nder		Age	
			Canada					British					
			2021-03	Atlantic	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Did you attend any of the	Total	Unwgt N	1283	122	252	437	265	207	709	574	270	534	479
following OUTDOOR cultural gatherings in		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
the 12-months before the COVID-19	Outdoor opera	%	0.6	0.8	0.4	0.7	0.6	0.5	0.4	0.7	0.6	0.2	1.0
outbreak? [RANDOMIZE] (select	Outdoor ballet and dance	%	1.6	1.5	1.4	2.3	0.4	1.8	1.3	1.9	2.1	1.4	1.5
all that apply)	Outdoor Theatre (drama, musical, dinner, comedy)	%	9.9	7.0	9.3	10.4	10.0	11.0	7.9	11.7	8.5	9.5	11.4
	Outdoor classical music performance	%	5.6	4.8	6.3	4.0	5.7	9.0	4.6	6.4	5.8	5.2	5.7
	Outdoor popular music performance	%	21.0	18.9	16.2	23.4	20.4	23.4	19.8	22.0	20.6	25.2	17.5
	Outdoor cultural or heritage music, theatre or dance performance (e.g. Aboriginal People's, Chinese, Ukrainian)	%	11.4	11.2	6.3	13.8	13.7	10.0	9.0	13.7	13.8	12.9	8.5
	Did not attend in the previous year	%	41.9	46.1	54.3	37.7	39.7	34.5	46.9	37.3	38.4	37.8	48.0
	Do not recall	%	8.0	9.6	5.8	7.6	9.6	9.9	10.0	6.2	10.3	7.9	6.5

^{*}Values are based on the proportion an activity represents of all activities (columns add up to 100 percent).

^{**}Multifrequency tab based on multiple responses



[This table reports on the views of culture-goers who attended an outdoor event in the 12-month period prior to the COVID-19 pandemic.]

					Reg	gion			Ge	nder		Age	
			Outdoor Culture-goers	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Have you attended or	Total	Unwgt N	385	33	64	141	79	68	192	193	80	175	130
when do you plan to attend, in		Wgt N	379	22	67	164	69	57	159	220	106	144	129
person, an OUTDOOR arts	Have already attended	%	8.2	14.1	4.7	4.0	17.4	10.9	7.5	8.7	6.8	8.9	8.6
or cultural performance?	Immediately	%	41.5	42.1	36.4	37.1	42.5	58.5	47.9	36.8	46.7	37.7	41.3
months	1-5 months	%	12.5	6.9	18.1	12.9	10.1	9.9	14.5	11.0	8.0	12.7	15.9
after businesses, government and	6 months or more	%	6.7	0.0	7.5	10.0	2.5	4.0	7.8	5.9	3.9	11.5	3.7
cultural organizations are	Never	%	2.9	0.0	5.7	3.4	2.5	0.0	3.6	2.4	5.7	1.7	2.0
reopened and following public health guidelines	Not sure	%	28.2	36.9	27.5	32.6	25.0	16.8	18.7	35.1	28.9	27.4	28.4



[This table reports on the views of culture-goers who attended an outdoor event in the 12-month period prior to the COVID-19 pandemic.]

				When do you plan to attend, in person	, an OUTDOOR arts or cult	tural performance?	
			Outdoor Culture- goers	Already attended/Immediately	Plans to wait	Never	Not sure
Question - What are the precautions	Total	Unwgt N	315	164	65	7	79
that need to occur to make you comfortable to attend an OUTDOOR		Wgt N	307	153	63	7	83
arts or cultural performance? [OPEN-	Vaccine	%	36.2	28.8	48.0		42.2
ENDED]	Social/Physical Distancing	%	34.2	36.6	31.9		34.6
	Masks	%	22.2	21.6	24.0		21.7
	Health Check Screening	%	1.0	1.1	0.0		1.6
	Cleaning Protocols	%	5.1	5.4	2.6		7.0
	No Cases/eradication of Covid-19	%	6.4	4.3	10.3		7.1
	Fewer Cases	%	6.3	3.3	10.0		9.3
	Hand sanitizer/hand washing	%	1.2	1.8	0.0		0.0
	Following medical/government guidelines	%	11.4	16.1	3.7		8.3
	None	%	11.1	18.0	1.1		5.7
	Smaller capacity/smaller events	%	5.7	4.5	0.0		12.8
	Not interested	%	0.4	0.0	2.1		0.0
	Other	%	3.0	2.2	5.1		1.8
	Unsure	%	1.0	0.5	1.2		1.9

^{*}Values are based on the percentage of positive responses to a specific precaution (columns exceed 100%). Results include up to three mentions

^{**}Multifrequency tab based on multiple responses.



			-	When d	o you plan to attend, in	person, an OUTDOOR a	ts or cultural perform	nance?	
			Outdoor Culture-	Have already			6 months or		
			goers	attended	Immediately	1-5 months	more	Never	Not sure
Question - What are the precautions that need to occur	Total	Unwgt N	315	34	130	43	22	7	79
to make you comfortable to attend an OUTDOOR arts or		Wgt N	307	28	125	43	20	7	83
cultural performance? [OPEN-ENDED]	Vaccine	%	36.2	21.0	30.6	48.2	47.6		42.2
	Social/Physical Distancing	%	34.2	39.7	35.9	31.7	32.3		34.6
	Masks	%	22.2	30.4	19.6	20.9	30.5		21.7
	Health Check Screening	%	1.0	0.0	1.3	0.0	0.0		1.6
	Cleaning Protocols	%	5.1	11.2	4.0	2.2	3.6		7.0
	No Cases/eradication of Covid-19	%	6.4	3.2	4.5	10.2	10.5		7.1
	Fewer Cases	%	6.3	9.4	2.0	9.6	10.9		9.3
	Hand sanitizer/hand washing	%	1.2	0.0	2.2	0.0	0.0		0.0
	Following medical/government guidelines	%	11.4	10.1	17.4	5.5	0.0		8.3
	None	%	11.1	23.6	16.7	1.6	0.0		5.7
	Smaller capacity/smaller events	%	5.7	5.4	4.3	0.0	0.0		12.8
	Not interested	%	0.4	0.0	0.0	3.1	0.0		0.0
	Other	%	3.0	2.7	2.1	5.7	3.6		1.8
	Unsure	%	1.0	0.0	0.6	1.8	0.0		1.9

^{*}Values are based on the percentage of positive responses to a specific precaution (columns exceed 100%). Results include up to three mentions

^{**}Multifrequency tab based on multiple responses.



[This table reports on the views of all Canadians]

					Re	gion			Ge	nder		Age	
			Canada					British					
			2021-03	Atlantic	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Did you attend any of the	Total	Unwgt N	1016	100	206	341	212	157	576	440	215	416	385
following in the 12- months before the		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
COVID-19 outbreak? [RANDOMIZE] (select all that apply)	An art museum or public art gallery (including attendance at special art exhibits)	%	38.2	28.3	25.8	43.4	38.3	49.6	34.2	42.0	37.1	37.3	39.7
	A museum other than an art museum	%	31.5	32.1	17.8	38.0	34.9	31.6	32.4	30.6	40.3	30.1	26.5
	Do not recall	%	49.8	54.1	64.6	44.2	47.1	41.6	51.9	47.8	48.0	51.6	49.6

^{*} Values are based on the percentage of positive responses to a specific activity (columns exceed 100%).

^{**}Multifrequency tab based on multiple responses



[This table reports on the views of all Canadians]

				Region						Gender			
			Canada 2021-03	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Did you attend any of the	Total	Unwgt N	1206	115	224	422	253	192	679	527	267	494	445
following in the 12- months before the		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
COVID-19 outbreak? [RANDOMIZE] (select all that apply)	An art museum or public art gallery (including attendance at special art exhibits)	%	31.9	24.7	23.8	34.5	31.8	40.4	28.8	34.9	29.6	31.4	34.3
	A museum other than an art museum	%	26.4	28.0	16.5	30.3	29.0	25.7	27.3	25.4	32.2	25.3	22.9
	Do not recall	%	41.7	47.3	59.7	35.2	39.2	33.9	43.8	39.7	38.2	43.4	42.8

^{*} Values are based on the proportion an activity represents of all activities (columns add up to 100 percent).

^{**}Multifrequency tab based on multiple responses



[This table reports on the views of culture-goers who attended an art gallery or museum in the 12-month period prior to the COVID-19 pandemic.]

			Art gallery or		Reg	gion			Ge	nder		Age	
			museum culture- goers	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Have you attended or when do you	Total	Unwgt N	512	46	76	185	111	94	278	234	112	200	200
plan to attend, in person, an art gallery or museum?		Wgt N	503	31	83	214	97	78	236	266	143	165	195
months after businesses, government	Have already attended	%	10.0	12.2	13.0	6.9	6.8	18.8	6.9	12.8	10.5	10.4	9.4
and cultural organizations are reopened and following	Immediately	%	33.6	33.4	39.6	28.2	35.6	40.1	35.6	31.9	36.6	29.0	35.4
public health guidelines	1-5 months	%	14.0	9.8	11.7	18.3	12.1	8.5	15.2	12.9	10.5	11.7	18.5
	6 months or more	%	7.1	5.5	9.9	6.7	6.5	6.4	8.2	6.1	2.9	11.0	6.8
	Never	%	2.8	6.7	2.5	2.0	3.7	2.7	4.1	1.7	3.1	1.8	3.4
	Not sure	%	32.5	32.5	23.4	38.0	35.3	23.6	30.0	34.6	36.5	36.0	26.5



[This table reports on the views of culture-goers who attended an art gallery or museum in the 12-month period prior to the COVID-19 pandemic.]

				When do you plan to atte	nd, in person, an art gall	ery or museum?	
			Art gallery or museum culture-goers	Already attended/Immediately	Plans to wait	Never	Not sure
Question -What are	Total	Unwgt N	398	169	100	10	119
the precautions that need to occur to make		Wgt N	392	172	96	8	115
you comfortable to	Social/physical distancing	%	25.1	29.1	22.0		22.0
visit an art gallery or museum? [OPEN-	Masks	%	25.9	31.5	22.3		21.9
ENDED]	Vaccine	%	39.7	31.1	48.8		45.0
	Following medical/ government guidelines	%	8.3	13.9	3.1		5.0
	Cleaning protocols	%	2.2	1.6	1.7		3.7
	No cases/eradication of COVID-19	%	4.3	1.2	7.0		6.3
	None	%	5.6	9.9	1.0		3.7
	Hand sanitizer/handwashing	%	3.9	3.7	2.8		4.8
	Health Check Screening	%	2.5	2.3	0.0		4.7
	Proper ventilation	%	4.3	3.3	5.1		5.4
	Not interested	%	0.9	1.2	1.6		0.0
	Smaller capacity/smaller events	%	14.3	17.5	12.9		10.9
	Fewer cases	%	6.8	2.9	12.8		7.6
	Other	%	8.5	4.9	15.7		7.0
	Unsure	%	1.4	0.0	0.0		3.8

^{*}Values are based on the percentage of positive responses to a specific precaution (columns exceed 100%). Results include up to three mentions

^{**}Multifrequency tab based on multiple responses.



[This table reports on the views of culture-goers who attended an art gallery or museum in the 12-month period prior to the COVID-19 pandemic.]

					When do you plan to	attend, in person, an a	art gallery or museum?		
			Art gallery or museum culture- goers	Have already attended	Immediately	1-5 months	6 months or more	Never	Not sure
Question -What are the precautions that need to	Total	Unwgt N	398	44	125	63	37	10	119
occur to make you		Wgt N	392	42	131	64	32	8	115
comfortable to visit an art gallery or museum?	Social/physical distancing	%	25.1	40.6	25.4	25.9	14.3		22.0
OPEN-ENDED]	Masks	%	25.9	37.0	29.7	24.6	17.5		21.9
	Vaccine	%	39.7	5.9	39.2	48.9	48.5		45.0
	Following medical/ government guidelines	%	8.3	23.0	11.0	1.9	5.5		5.0
	Cleaning protocols	%	2.2	1.8	1.6	1.4	2.4		3.7
	No cases/eradication of COVID-19	%	4.3	0.0	1.5	5.9	9.3		6.3
	None	%	5.6	13.6	8.7	0.0	2.9		3.7
	Hand sanitizer/handwashing	%	3.9	2.0	4.2	1.5	5.3		4.8
	Health Check Screening	%	2.5	0.0	3.0	0.0	0.0		4.7
	Proper ventilation	%	4.3	3.7	3.2	5.6	4.1		5.4
	Not interested	%	0.9	0.0	1.6	0.0	4.8		0.0
	Smaller capacity/smaller events	%	14.3	23.2	15.7	10.7	17.2		10.9
	Fewer cases	%	6.8	0.0	3.8	12.3	13.7		7.6
	Other	%	8.5	5.9	4.5	17.2	12.7		7.0
	Unsure	%	1.4	0.0	0.0	0.0	0.0		3.8

^{*}Values are based on the percentage of positive responses to a specific precaution (columns exceed 100%). Results include up to three mentions

^{**}Multifrequency tab based on multiple responses.



[This table reports on the views of culture-goers who attended an INDOOR or OUTDOOR cultural activity or attended an art gallery or museum in the 12-month period prior to the COVID-19 pandemic.]

Question - Thinking of all the time you spent during the pandemic consuming content from an arts or cultural organization, what is the percentage of time you have spent consuming content in person versus online?

Region		In person free	In person paid	Online free	Online paid
Atlantic	Mean	18.37	9.89	64.90	6.84
	Median	0.00	0.00	81.71	0.00
	N	47	47	47	47
Quebec	Mean	13.27	9.25	60.61	16.87
	Median	0.00	0.00	62.89	0.00
	N	138	138	138	138
Ontario	Mean	10.06	3.96	71.36	14.62
	Median	0.00	0.00	90.00	0.00
	N	287	287	287	287
Prairies	Mean	14.02	7.58	66.59	11.81
	Median	0.00	0.00	89.17	0.00
	N	133	133	133	133
British Columbia	Mean	11.10	7.37	72.04	9.48
	Median	0.00	0.00	90.00	0.00
	N	97	97	97	97
rotal rotal	Mean	12.14	6.55	68.01	13.30
	Median	0.00	0.00	80.00	0.00
	N	702	702	702	702



[This table reports on the views of culture-goers who attended an INDOOR or OUTDOOR cultural activity or attended an art gallery or museum in the 12-month period prior to the COVID-19 pandemic.]

Question - Thinking of all the time you spent during the pandemic consuming content from an arts or cultural organization, what is the percentage of time you have spent consuming content in person versus online?

Gender		In person free	In person paid	Online free	Online paid
Male	Mean	10.95	5.86	68.36	14.83
	Median	0.00	0.00	85.00	0.00
	N	333	333	333	333
Female	Mean	13.21	7.18	67.70	11.91
	Median	0.00	0.00	80.00	0.00
	N	369	369	369	369
Total	Mean	12.14	6.55	68.01	13.30
	Median	0.00	0.00	80.00	0.00
	N	702	702	702	702



[This table reports on the views of culture-goers who attended an INDOOR or OUTDOOR cultural activity or attended an art gallery or museum in the 12-month period prior to the COVID-19 pandemic.]

Question - Thinking of all the time you spent during the pandemic consuming content from an arts or cultural organization, what is the percentage of time you have spent consuming content in person versus online?

Age		In person free	In person paid	Online free	Online paid
18 to 34	Mean	10.88	7.50	63.25	18.36
	Median	0.00	0.00	71.97	10.00
	N	192	192	192	192
35 to 54	Mean	9.73	4.75	73.32	12.19
	Median	0.00	0.00	95.00	0.00
	N	249	249	249	249
55 plus	Mean	15.37	7.57	66.44	10.62
	Median	0.00	0.00	80.00	0.00
	N	261	261	261	261
Total	Mean	12.14	6.55	68.01	13.30
	Median	0.00	0.00	80.00	0.00
	N	702	702	702	702



[This table reports on the views of culture-goers who attended an INDOOR or OUTDOOR cultural activity or attended an art gallery or museum in the 12-month period prior to the COVID-19 pandemic.]

Once the pandemic has ended and it is safe to go to any event, what is the percentage of time you expect to spend consuming content directly from an arts or cultural organization in person versus online?

Region		In person free	In person paid	Online free	Online paid
Atlantic	Mean	34.267	30.338	29.218	6.177
	Median	26.035	25.000	25.000	0.000
	N	47	47	47	47
Quebec	Mean	27.790	37.346	27.226	7.638
	Median	25.000	30.000	20.000	0.000
	N	139	139	139	139
Ontario	Mean	29.191	36.249	26.559	8.001
	Median	25.000	30.000	20.000	0.000
	N	288	288	288	288
Prairies	Mean	29.293	36.972	26.192	7.543
	Median	25.000	25.000	20.000	0.000
	N	135	135	135	135
British Columbia	Mean	31.635	39.474	24.997	3.894
	Median	25.000	40.000	12.999	0.000
	N	101	101	101	101
Total	Mean	29.620	36.672	26.572	7.136
	Median	25.000	30.000	20.000	0.000
	N	710	710	710	710



[This table reports on the views of culture-goers who attended an INDOOR or OUTDOOR cultural activity or attended an art gallery or museum in the 12-month period prior to the COVID-19 pandemic.]

Once the pandemic has ended and it is safe to go to any event, what is the percentage of time you expect to spend consuming content directly from an arts or cultural organization in person versus online?

	In person free	In person paid	Online free	Online paid
Mean	27.261	34.254	30.496	7.989
Median	25.000	25.000	25.000	0.000
N	340	340	340	340
Mean	31.792	38.897	22.961	6.350
Median	25.000	35.000	20.000	0.000
N	370	370	370	370
Mean	29.620	36.672	26.572	7.136
Median	25.000	30.000	20.000	0.000
N	710	710	710	710
	Median N Mean Median N Mean Mean Mean Mean	Mean 27.261 Median 25.000 N 340 Mean 31.792 Median 25.000 N 370 Mean 29.620 Median 25.000	Mean 27.261 34.254 Median 25.000 25.000 N 340 340 Mean 31.792 38.897 Median 25.000 35.000 N 370 370 Mean 29.620 36.672 Median 25.000 30.000	Mean 27.261 34.254 30.496 Median 25.000 25.000 25.000 N 340 340 340 Mean 31.792 38.897 22.961 Median 25.000 35.000 20.000 N 370 370 370 Mean 29.620 36.672 26.572 Median 25.000 30.000 20.000



[This table reports on the views of culture-goers who attended an INDOOR or OUTDOOR cultural activity or attended an art gallery or museum in the 12-month period prior to the COVID-19 pandemic.]

Once the pandemic has ended and it is safe to go to any event, what is the percentage of time you expect to spend consuming content directly from an arts or cultural organization in person versus online?

Age		In person free	In person paid	Online free	Online paid
18 to 34	Mean	30.624	34.746	24.090	10.540
	Median	25.000	25.000	20.000	0.000
	N	195	195	195	195
35 to 54	Mean	30.190	35.338	28.419	6.053
	Median	25.000	30.000	20.000	0.000
	N	252	252	252	252
55 plus	Mean	28.331	39.377	26.641	5.651
	Median	25.000	35.000	20.000	0.000
	N	263	263	263	263
Total Total	Mean	29.620	36.672	26.572	7.136
	Median	25.000	30.000	20.000	0.000
	N	710	710	710	710



[This table reports on the views of culture-goers who attended an INDOOR or OUTDOOR cultural activity or attended an art gallery or museum in the 12-month period prior to the COVID-19 pandemic.]

					Region				Ge	nder		Age	
			Culture-goers	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - What do you	Total	Unwgt N	624	58	109	225	136	96	338	286	121	267	236
value most, if anything, about participating in a		Wgt N	603	40	118	250	115	82	285	318	152	219	233
cultural activity online? [OPEN-ENDED]	Nothing/I do not participate in online activities/Do not value it	%	19.9	21.8	14.4	19.5	26.9	18.0	20.3	19.5	23.2	22.1	15.6
	Educational/learn new things	%	7.4	5.9	3.0	7.4	12.8	6.7	8.3	6.6	8.2	5.5	8.6
	Accessible/convenient (can pause performances and/or watch from home)	%	19.9	27.6	27.0	16.6	17.1	19.4	20.2	19.6	20.8	23.0	16.3
	The ability to still enjoy an event/entertainment	%	21.5	11.0	26.3	24.7	17.2	16.0	20.8	22.1	17.0	17.6	28.2
	Social interaction/a way to stay connected	%	6.5	3.5	2.3	8.3	5.0	10.7	4.3	8.5	9.2	5.6	5.6
	More variety/options	%	5.4	8.2	6.5	3.5	4.8	9.4	6.5	4.5	4.7	5.6	5.7
	Safety with regards to the pandemic	%	2.6	8.5	1.3	3.3	1.5	0.9	2.8	2.4	1.8	3.4	2.4
	The event can originate from anywhere in the world/experiencing different cultures	%	5.4	3.5	4.1	7.2	4.2	3.9	5.3	5.4	4.4	3.7	7.5
	Video/sound quality	%	2.9	4.8	4.7	2.8	0.0	3.7	2.4	3.3	1.5	3.8	3.0
	Free/low prices	%	1.3	0.0	2.7	1.0	1.8	0.0	1.1	1.4	1.6	1.7	0.7
	Supporting artists	%	3.1	1.8	2.1	3.1	4.0	4.2	3.6	2.7	3.7	5.3	0.7
	Other	%	3.3	1.7	3.9	2.2	3.9	5.6	2.9	3.6	2.1	1.9	5.4
	Unsure	%	0.9	1.7	1.5	0.4	0.8	1.4	1.5	0.4	1.9	0.8	0.4



[This table reports on the views of culture-goers who attended an INDOOR or OUTDOOR cultural activity or attended an art gallery or museum in the 12-month period prior to the COVID-19 pandemic.]

					Region				Ge	nder		Age	
			Culture-goers	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - What do you	Total	Unwgt N	641	59	110	231	141	100	351	290	129	271	241
value most, if anything, about participating in a		Wgt N	621	40	119	258	117	86	296	325	163	221	237
cultural activity in person? [OPEN-ENDED]	Nothing/I do not participate in in-person activities/Do not value it	%	3.9	3.3	5.5	2.6	5.1	4.1	6.1	1.8	2.8	5.5	3.1
	Social interaction/sense of community	%	31.6	36.9	23.2	34.3	34.0	29.1	29.4	33.6	34.1	28.3	32.9
	Getting out of the house	%	1.4	4.6	2.7	0.8	0.7	0.7	2.3	0.6	3.5	0.6	0.7
	Supporting artists	%	1.3	3.5	0.7	0.9	2.5	1.0	1.4	1.3	1.7	2.3	0.2
	Ambience/atmosphere	%	11.2	4.7	17.3	12.1	6.8	8.7	8.8	13.3	9.3	12.8	11.0
	The entire experience/it's more engaging	%	29.0	26.8	22.8	31.5	30.4	29.0	31.3	26.9	27.3	31.3	28.0
	The quality of performances	%	1.8	3.0	3.1	1.8	0.0	1.6	1.6	1.9	1.3	0.9	2.8
	Entertainment value	%	3.0	1.7	2.3	3.5	3.5	2.5	2.4	3.5	2.4	2.6	3.9
	Learning new things	%	3.3	2.1	0.7	4.2	3.7	4.3	3.5	3.1	5.2	2.6	2.6
	Being part of a crowd/crowd reaction	%	1.8	1.7	1.3	1.9	0.8	3.8	2.8	1.0	1.0	2.9	1.5
	Experiencing different cultures	%	2.3	0.0	0.8	2.2	3.0	4.9	0.4	4.1	1.9	1.9	3.0
	Live music	%	2.1	2.1	3.4	1.2	2.3	2.5	2.0	2.1	0.5	1.9	3.2
	Other	%	6.7	7.9	15.4	2.5	5.7	7.7	7.0	6.4	8.4	5.8	6.3
	Unsure	%	0.7	1.8	0.9	0.4	1.4	0.0	1.0	0.5	0.6	0.7	0.7