

Culture-goers are three times more likely to say they intend to spend more rather than less on arts/culture in 2022 compared 2021.

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 eleventh wave of tracking research contains information on the sentiments 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;
- Supporting and donating to arts/culture organizations; and,
- Their preferred timelines of buying tickets.

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

Key Findings



Culture-goers are three times more likely to say they intend to spend more rather than less on arts/culture in 2022 compared 2021

Twenty-eight per cent of culture-goers intend to spend more in 2022 as they did in 2021 to attend arts and cultural performances, while four in ten (39%) say they intend to spend about the same and one in ten (10%) intend to spend less. Culture-goers from the Atlantic region and Quebec are around 5 times more likely to say they will spend more rather than less in 2022 compared to 2021.



Expected donations are to remain steady among culture-goers

Three in ten culture-goers (30%) report donating to arts and culture organizations in 2021 (an average of \$138), which is consistent with what they said they intended to donate for 2021 when we asked this question in August 2021 (36%, average of \$147). When asked about donations for the year 2022, culture-goers expect to donate about the same as they did in 2021, with three in ten (31%) who say they intend to donate (an average of \$146). Expected donations remain steady across demographics.



Culture-goers are now less likely to prefer buying tickets well in advance

Culture-goers (28%) are currently less likely to prefer purchasing tickets well in advance (up to six months in advance) compared to before the pandemic (37%). Quebec residents were most likely say they preferred purchasing tickets well in advance before the pandemic (49%, compared to 37% of all culture-goers) and currently (37%, compared to 28% of all culture-goers).



Masks seen as less important for lapsed culture-goers as a motivator for return

While having something interesting and fun remains the top motivator for lapsed culture-goers to return to the arts (40%), there has been a decrease in the proportion that say they want masks from 17 per cent in August 2022 to seven per cent in this wave of research. One in ten say discounted events and lower prices would motivate them (11%).

Top motivators for attending in-person art/culture events among lapsed culture-goers



Donations and spending for arts and culture

Culture-goers expect to donate about the same in 2022 as they report donating in 2021 with three in ten who say they will donate (30% in 2021, 31% in 2022).

Donations

2021



Average of

\$138

Donations

2022



Average of

\$146

Culture-goers are nearly three times more likely to say they intend to spend more rather than less to attend arts and cultural performances in 2022 than they did in 2021.

39%

Intend to spend about the same.

28%

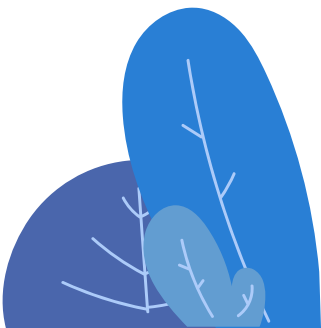
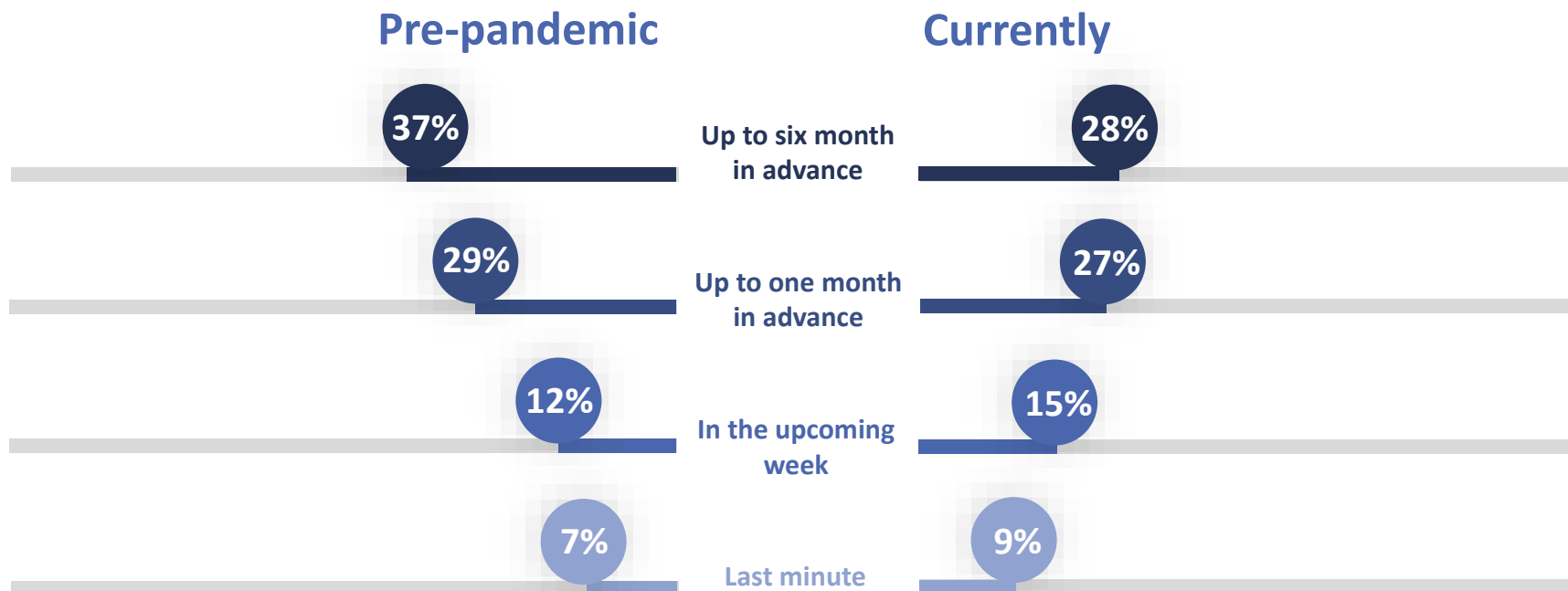
Intend to spend more.

10%

Intend to spend less.

Ticket purchasing preferences among culture-goers

Culture-goers are currently less likely to prefer purchasing tickets well in advance (up to six months in advance) compared to before the pandemic. Quebec residents are more likely say they preferred purchasing tickets well in advance before the pandemic (49%) and currently (37%).



Returning to in-person events

Indoor events

Outdoor events

Museums and galleries

Have already returned

[57%]

[64%]

[56%]

Plans to wait

[14%]

[8%]

[15%]

Unsure

[24%]

[24%]

[24%]

A photograph of a theater interior, viewed from the audience's perspective. The stage is at the top, covered by a large, deep red curtain. The audience is seated in rows of dark chairs, filling the lower two-thirds of the frame. The lighting is dim, creating a focused atmosphere on the stage area.

Motivators and precautions in attending arts and culture

Motivators for attending in-person arts and culture events for lapsed culture-goers

Q

[IF HAS NOT YET RETURNED TO INDOOR ARTS AND/OR MUSEUM] What would motivate you to decide to attend an in-person arts and culture experience or in-person art galleries or museums? [OPEN]

“

Something interesting and fun remains the top motivator for lapsed culture-goers to return to the arts. There has been a decrease in the proportion that say they want masks.

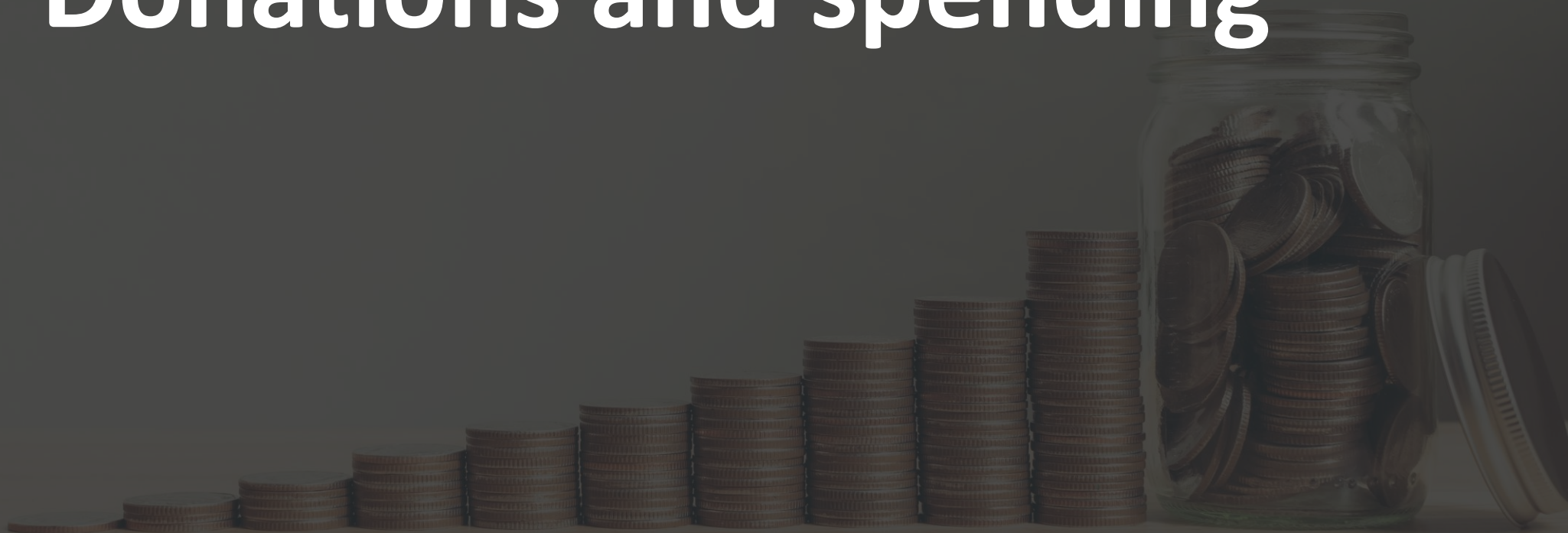
”

TOP RESPONSES

	Oct 2022 (n=553)	May 2022 (n=510)
Something interesting/fun	40.3%	32.6%
Discounted events/lower prices	10.6%	5.1%
Nothing/Not interested/I wouldn't attend	10.1%	5.4%
Enforced masks	6.5%	16.8%
Not too busy/social distancing	5.3%	8.1%
Something good/high quality	4.3%	3.2%
End of pandemic/drop in cases	4.0%	9.9%
Good timing/having time to go	3.6%	3.3%
Information on the precautions taken by venue/feeling like it will be safe	3.4%	2.5%
Easily accessed	3.4%	3.5%
I would already go	3.3%	6.0%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 30th to October 3rd, 2022, n=553 Lapsed culture-goers, accurate 4.2 percentage points plus or minus, 19 times out of 20.

Donations and spending



Donations in 2021

“

Overall, reported donations from culture-goers for the year 2021 match what they said they intended to donate for 2021 when we asked this question in August 2021 with three in ten who report donating (average of \$138) (36% who intended to donate in 2021, average of \$147).

”

Q

In 2021, how much did you donate, if anything, to arts/cultural organizations? \$ _____

[TRACKING AUGUST 2021] In 2021, how much do you intend to donate, if anything, to arts/cultural organizations?

	Oct 2022 (n=738)	August 2021 (n=644)
Mean	\$137.60	\$146.70
Median	\$0	\$0
\$0	69.7%	64.0%
\$100	6.4%	10.7%
\$50	3.7%	4.2%
\$500	3.6%	3.9%
\$200	3.2%	4.4%
\$250	1.3%	1.6%
\$25	1.3%	0.8%

TOP RESPONSES

Intended donations for 2022

Q

In 2022, how much do you intend to donate, if anything, to arts/cultural organizations? \$ _____

“

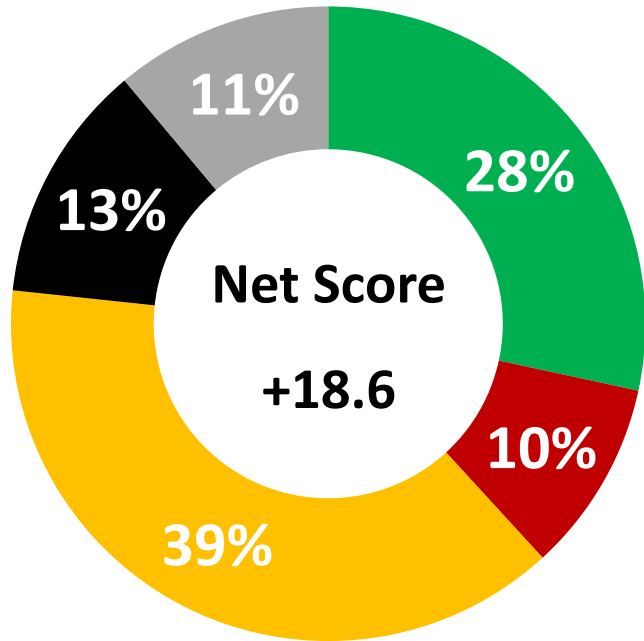
Three in ten culture-goers say they intend to donate to arts and cultural organization in 2022, and they intend to donate, on average, \$146.

”

	Oct 2022 (n=720)
Mean	\$146.40
Median	\$0.00
\$0	68.8%
\$100	8.7%
\$500	3.8%
\$50	3.6%
\$200	3.0%
\$1000	1.5%
\$300	1.3%
\$250	0.9%
\$20	0.9%

TOP RESPONSES

Change in amount spent to attend arts and cultural performances



- Intend to spend more
- Intend to spend less
- Intend to spend about the same
- Not applicable/I do not spend money to attend arts and cultural performances
- Unsure

Q

In 2022, do you intend to spend more, less or about the same as you did in 2021 to attend arts and cultural performances?

	Atlantic (n=62)	Quebec (n=183)	Ontario (n=269)	Prairies (n=183)	BC (n=123)
Intend to spend about the same	30.7%	44.6%	33.3%	46.6%	35.3%
Men (n=404)	40.3%	37.0%	42.3%	38.7%	35.4%
Women (n=414)	30.7%	44.6%	33.3%	46.6%	35.3%
18 to 34 (n=193)	40.3%	37.0%	42.3%	38.7%	35.4%
35 to 54 (n=295)	30.7%	44.6%	33.3%	46.6%	35.3%
55 plus (n=332)	40.3%	37.0%	42.3%	38.7%	35.4%
Intend to spend more	27.3%	29.5%	28.1%	24.7%	32.0%
Men (n=404)	32.0%	34.7%	26.5%	25.1%	26.3%
Women (n=414)	27.3%	29.5%	28.1%	24.7%	32.0%
18 to 34 (n=193)	32.0%	34.7%	26.5%	25.1%	26.3%
35 to 54 (n=295)	27.3%	29.5%	28.1%	24.7%	32.0%
55 plus (n=332)	32.0%	34.7%	26.5%	25.1%	26.3%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 30th to October 3rd, 2022, n=820 Culture-goers, accurate 3.4 percentage points plus or minus, 19 times out of 20.