CULTURE TRACK

ONTARIO

Business/Arts

LaPlaca Cohen

NANOS

With support from:

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

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

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Acknowledgments

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About Culture Track: Ontario

What is *Culture Track: Ontario?*

Culture Track: Ontario is a study of the attitudes and behaviours of Ontario's cultural consumers, fielded as part of the national *Culture Track: Canada* study.

Building on the long-running *Culture Track* research initiative of LaPlaca Cohen, a New York-based strategy, marketing, and design firm for the creative and cultural worlds, *Culture Track: Ontario* sets an important baseline for both understanding the unique proclivities of Ontario's cultural audiences, and for future research efforts that may build upon insights first uncovered here.

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

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

How was *Culture Track: Ontario* fielded?

The *Culture Track: Ontario* survey was fielded from December 21, 2017 to January 11, 2018 with a total of 1,012 respondents across Ontario in an online questionnaire administered in both French and English. All respondents were 18 years or older and were screened into the survey based on two criteria: their participation in at least one cultural activity in the past twelve months (see a list of activities surveyed on the next page); and their definition of that activity as a "cultural" activity.

Cultural Activities

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

What's included in this document?

The graphs and insights in this top-line report illustrate the overall Ontario data set at a baseline level and, in specific places, Ontario's regions, specific generations, racialized groups, and other demographic cohorts. Comparisons are also made to the greater *Culture Track: Canada* data set (n=6,444). More granular statistics on specific sub-groups, including Ontario regional breakdowns, can be found in the raw data tables online at www.businessandarts.org/culturetrack.

Note: When we break out the data by generations, age ranges are defined as Millennials (20-35), Gen X (36-52), Baby Boomers, (53-71), and Pre-Wars (72+). Ontario's regions are based on Ontario Arts Council's geographic regions, with sample sizes as follows: North n=76; East n=103; Central n=101; South Central n=250; Toronto n=230; Southwest n=252. For the purposes of this top-line report, "people of colour" are defined as those who self-identity as neither white/Caucasian nor Indigenous. Please also note that, while Culture Track: Canada included national Francophone responses at a statistically significant level, too few Francophones in Ontario specifically completed the survey to report on here at the provincial level.

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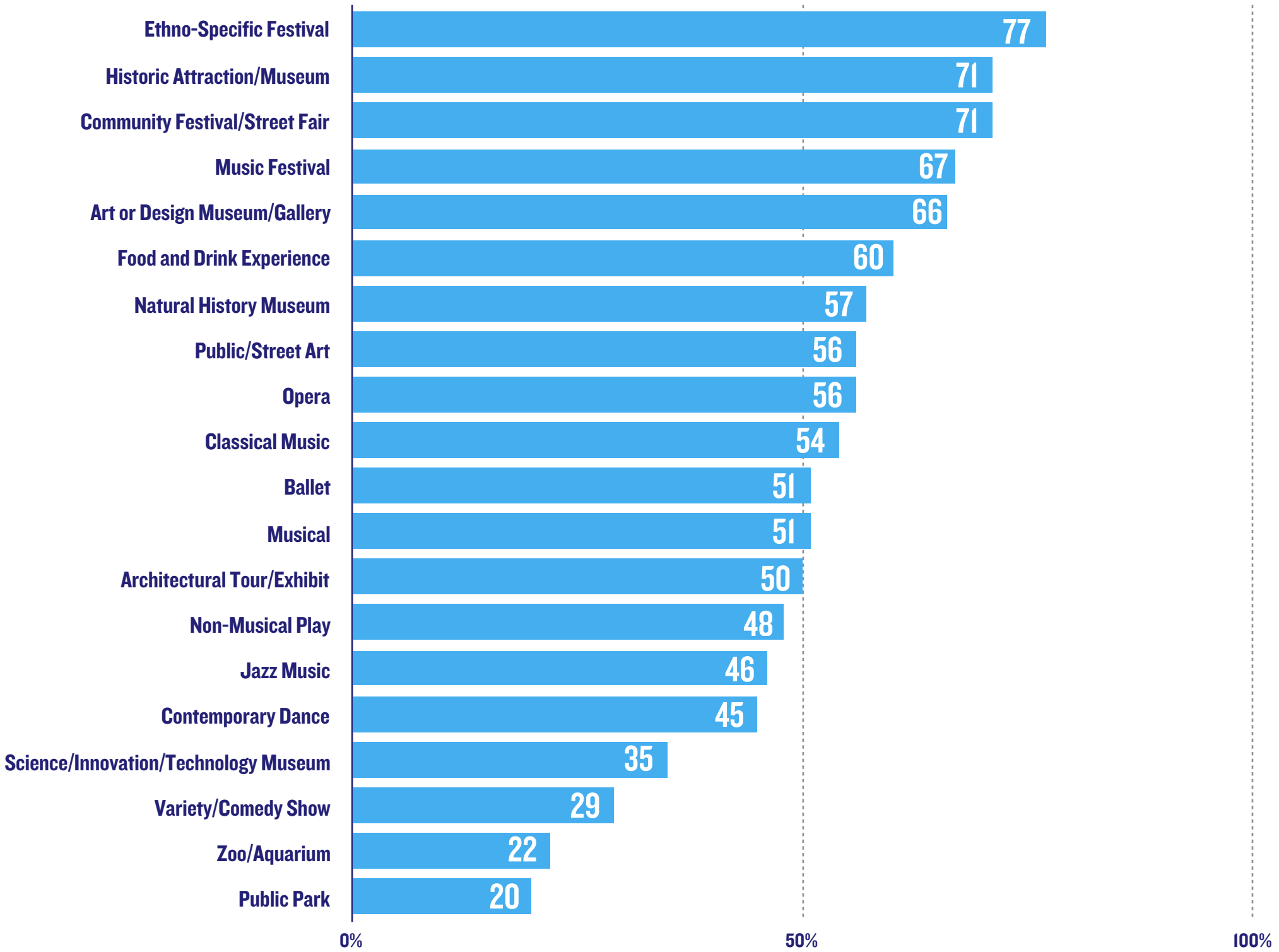
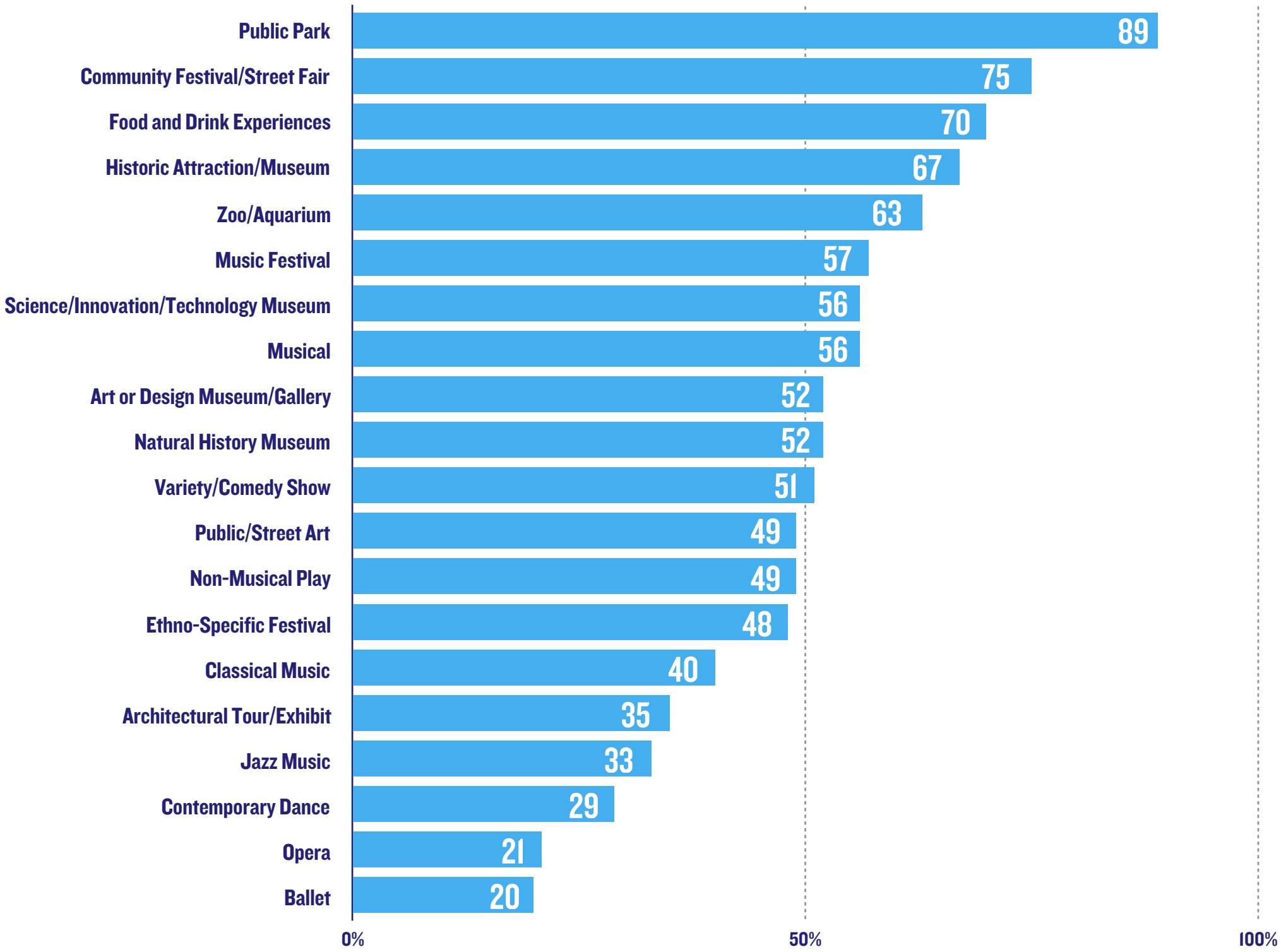
The Ontario Cultural Landscape

Definition of Culture



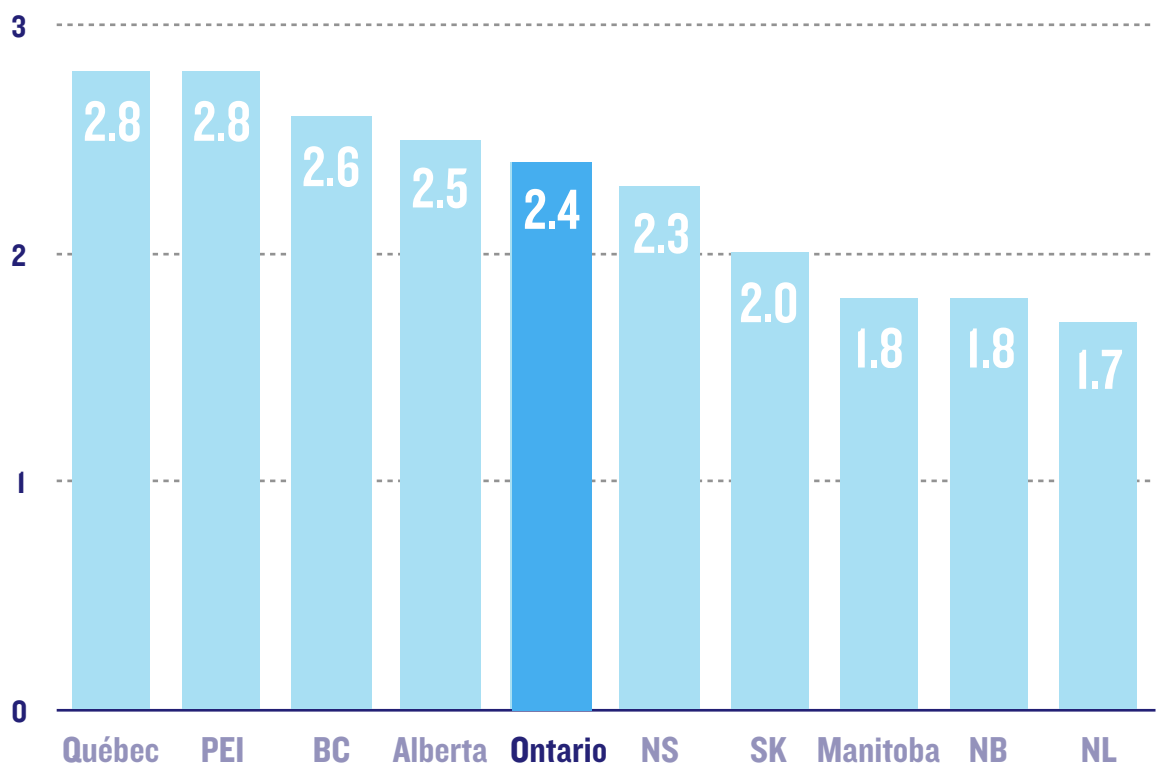
Ontarians are cultural omnivores. Rather than define "culture" in narrow terms, Ontario audiences view culture as inclusive of a broad and diverse set of activities, whether that be a visual art museum, a dining experience, a music festival, or a local street fair.

Participation At Least Once a Year



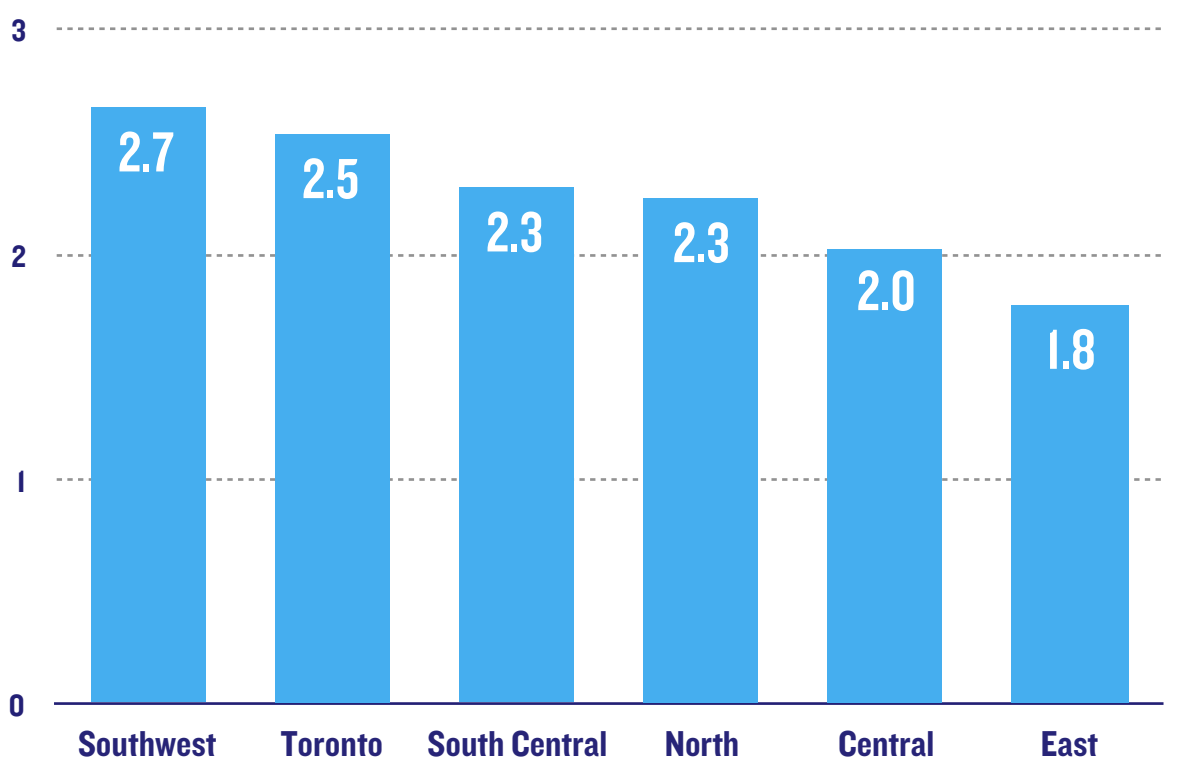
Although Ontario audiences define "culture" expansively, what do they actually participate in the most? By and large, activities like going to parks, community festivals, or food and drink experiences are more popular throughout the province than the "benchmark arts" (those activities that have historically been thought of as "traditional" culture, such as classical music, ballets, or operas). This puts Ontario in line with audience sentiment nationwide: For instance, in both Ontario and Canada as a whole, parks and community festivals were the most popular activities, while ballet and opera were the least.

Frequency of Participation Per Month



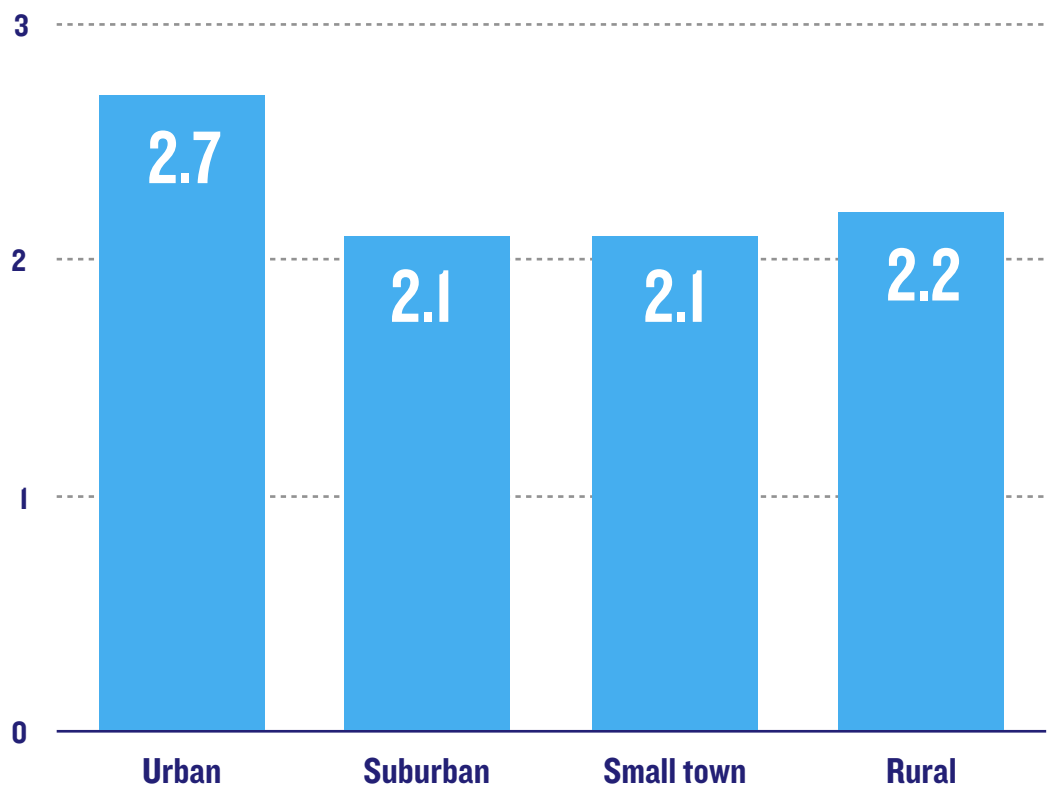
Despite being Canada's most populous province, Ontario is not the most culturally active when compared to the rest of the country. Ontarian audiences report participating in 2.4 activities on average per person, per month, just slightly more than Nova Scotia.

Frequency of Participation Per Month



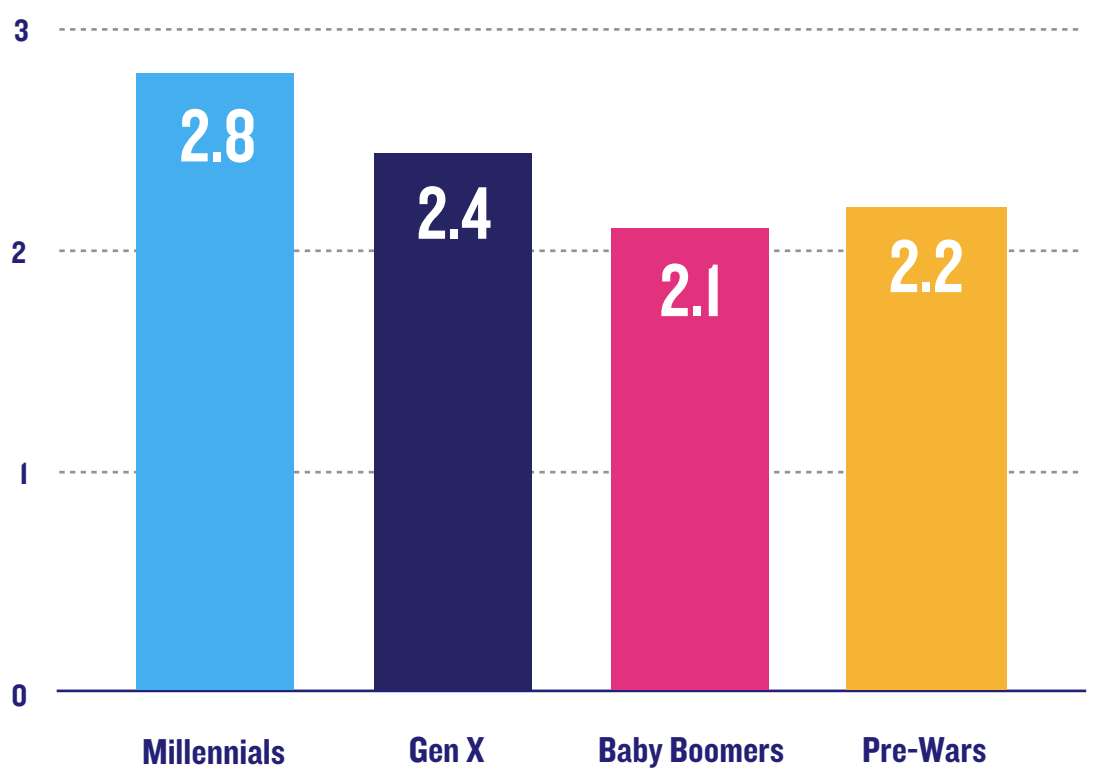
There are also differences in participation rates between Ontario's regions. The Southwest region and Toronto report participation levels greater than or equal to the national average of 2.5 activities per year, followed closely behind by the South Central and North regions, at 2.3 each.

Frequency of Participation Per Month



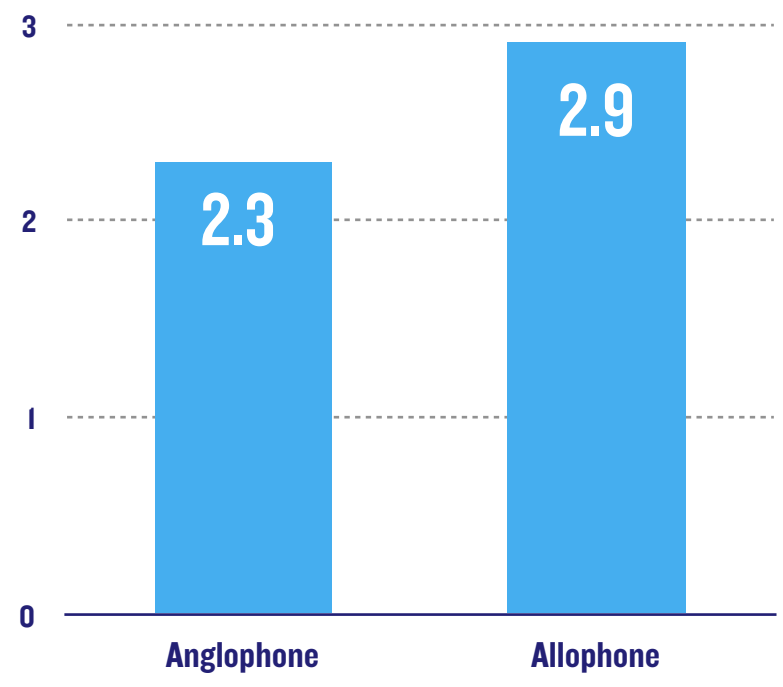
Community size also has a bearing on rates of cultural participation in Ontario. Those living in cities (over 50,000 people) report being more culturally active than those living in less densely populated areas and, unsurprisingly based on the clustering of cultural infrastructure in cities, are more likely to say they participate in things like art museums, opera, dance, or architectural tours. However, this doesn't mean that small town or rural Ontarians aren't culturally engaged at all. These audiences still report participating in activities like historic sites, parks, TV, film, and festivals at high levels, and at percentages on par with their urban counterparts.

Frequency of Participation Per Month



Millennials in Ontario are the most culturally active, taking part in nearly three cultural activities per month (slightly less than Canadian Millennials as a whole, who averaged 3.0 activities per month). And they're not just going to music festivals or street fairs. For almost every activity surveyed, those 35 and under are more likely than their older counterparts to participate at least once annually.

Frequency of Participation Per Month



As is true in other provinces, the primary language one speaks is also a significant indicator of cultural engagement in Ontario. Audiences who self-identity as Allophones (those who speak a language other than English or French at home) report being more culturally active than Anglophones across the board. These audiences, who are often first-generation immigrants or immigrants themselves, participate in 2.9 activities per month, compared to 2.3 for Anglophones, numbers consistent with participations rates of these groups nationally. And in general, Allophones' tastes are omnivorous: With the exception of TV and popular music, higher percentages of Allophones than Anglophones say they participate at least once a year in every activity surveyed. (Please note: Too few Francophones in Ontario specifically completed the survey to report on here at the provincial level. However, Francophone-specific data is available in *Culture Track: Canada.)*

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

The most popular activities with Ontario audiences—from parks to festivals, food and drink experiences to aquaria—seem to share three core principles: community, connection, and discovery. These types of activities bring together audiences with shared interests, provide opportunity for sociability, and often expose participants to new things. What's more, these three principles directly map to Ontario audiences' own understanding of culture's greatest possible impact—belonging, empathy, and perspective. These three impacts, illustrated on the next pages through verbatim quotes from *Culture Track: Ontario* respondents, further reinforce the perceived societal benefit of the most popular cultural activities, and are also consistent with perceptions of culture's impact by Canadians nationwide.

The first principle is a sense of community. At its heart, culture brings people together, providing a sense of **belonging** and inclusion for audiences. It makes participants feel part of a greater whole and even, as one Ontarian cultural consumer put it, "secure and wanted."

Community → Belonging

"Gives me a sense of belonging! Validates who I am and my values. Makes me feel secure and wanted."

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

Connection → Empathy

"Learn from understanding difference. We should learn from each other and embrace each other by accepting each other's accomplishments."

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

Discovery → Perspective

> **"To bring new ideas and ways of thinking to people that will inspire them to look beyond their own small space in the world."**

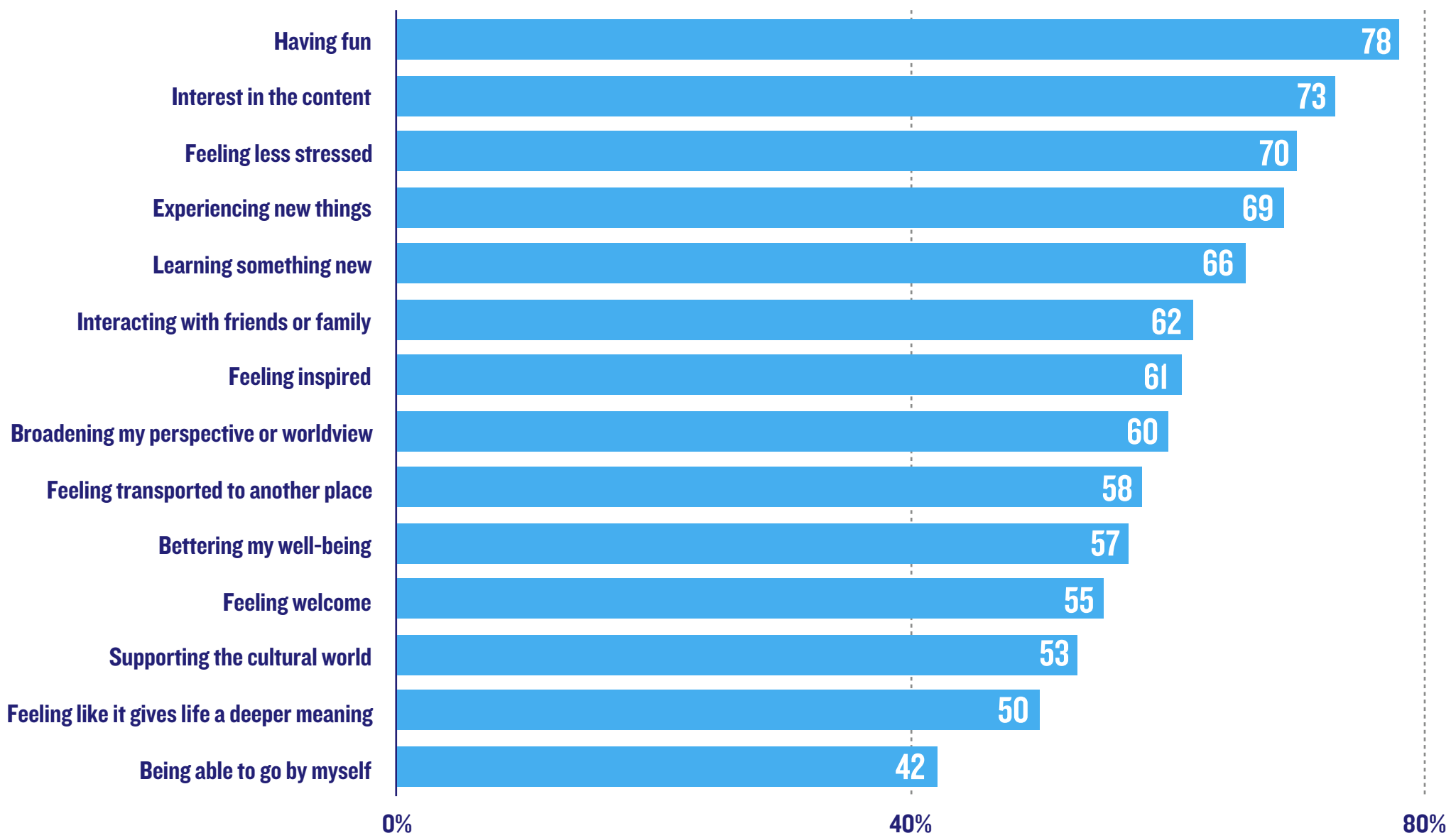
What does this all mean? Simply put, Ontarians are adamant that culture—broadly defined—matters in their lives. Whether by providing a sense of belonging through community, fostering empathy through connection with others, or bringing much needed perspective via a sense of discovery, culture has intrinsic,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

3

Today's Cultural Consumer

For any cultural organization, truly understanding the wants and needs of audiences is paramount. But in today's expanded field of culture, what is the mindset of Ontario's cultural consumers? Why do they engage with culture in the first place, and what causes them to stay away?

Motivators For Cultural Participation



Like Canadians in general, Ontario audiences are driven to attend cultural activities for a variety of reasons. However, there is one unifying and unanimous motivator for the province as a whole, and for each of its regions: having fun. Cultural organizations may scoff at the word "fun" because it can be perceived as a distraction from their core missions, but audiences believe that engaging in mission-driven experiences and seeking enjoyment or pleasure don't have to be mutually exclusive.

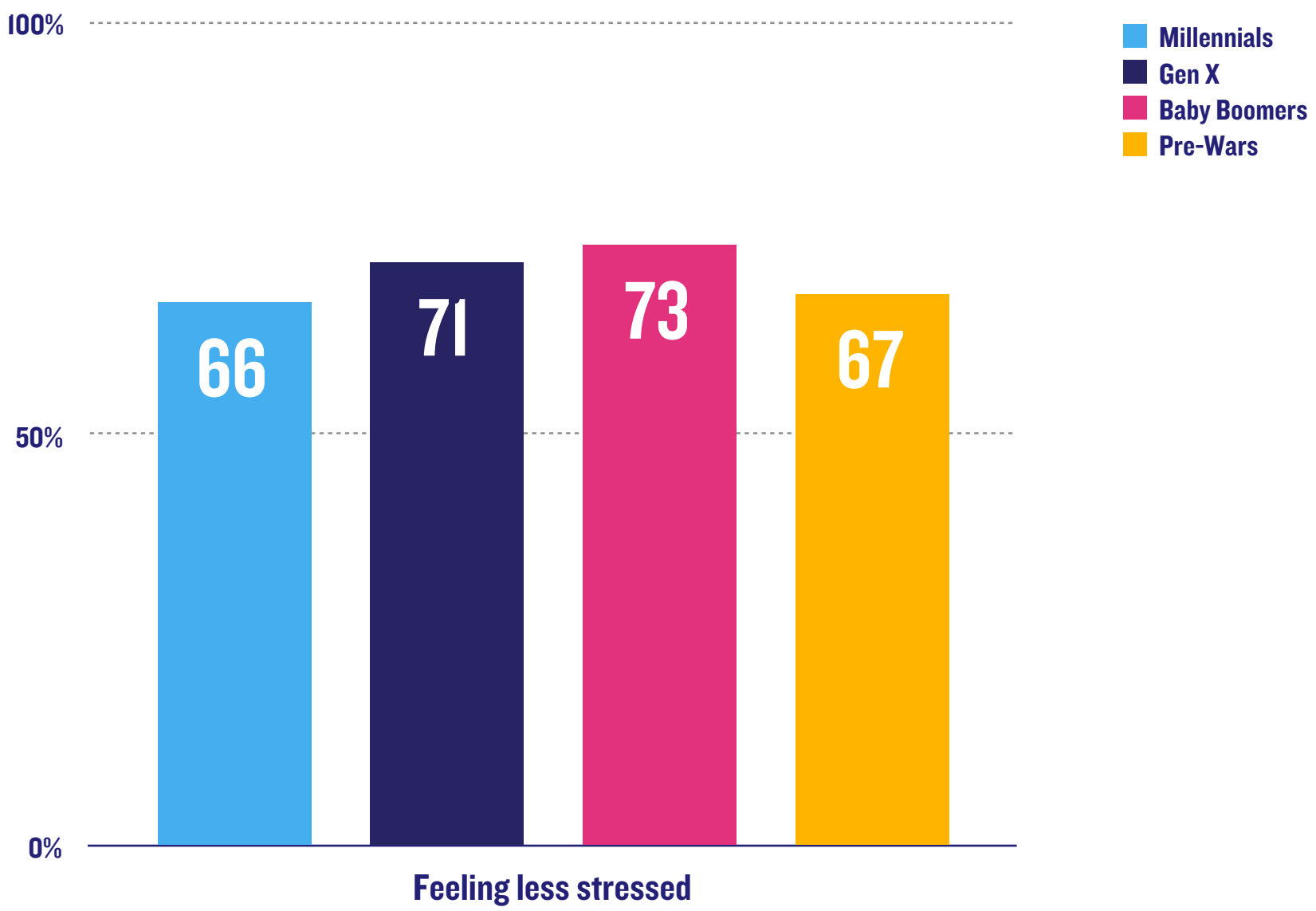
Characteristics of an Ideal Cultural Activity

1. Social
2. Lively
3. Interactive

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

Nevertheless, it should be remembered that the desire for "fun," is not the end-all be-all for audiences; they have a variety of other motivators for participating in cultural activities. Following a general interest in the content provided by the experience, all things "new" seem to be critical drivers for audiences, who seek out culture as an important element of their personal development and exposure to fresh ideas.

Motivators For Cultural Participation



Culture's unique ability to relieve stress is also a significant motivator to participation. Whether by providing a calming atmosphere, a seamless visitor experience, or accessible content, Ontario audiences look to cultural experiences to reduce anxiety, not add to it. Interestingly, while national audiences reported this motivator rather uniformly across generational divides, in Ontario the sentiment is felt most by Baby Boomers.

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

On the flip side, it is also important to consider why culture can drive audiences away. Irrelevance is more often than not the culprit: The primary barrier to participation for Ontario cultural consumers is feeling that a cultural activity is "not for someone like me." This was the top barrier in Canada nationwide as well, and is cited as the top barrier by nearly every Ontario region. For Ontario audiences, this barrier is followed in importance by the location of the activity being too far away, the cost of participation being too high, a lack of awareness about the activity to begin with, and inconvenient timing.

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

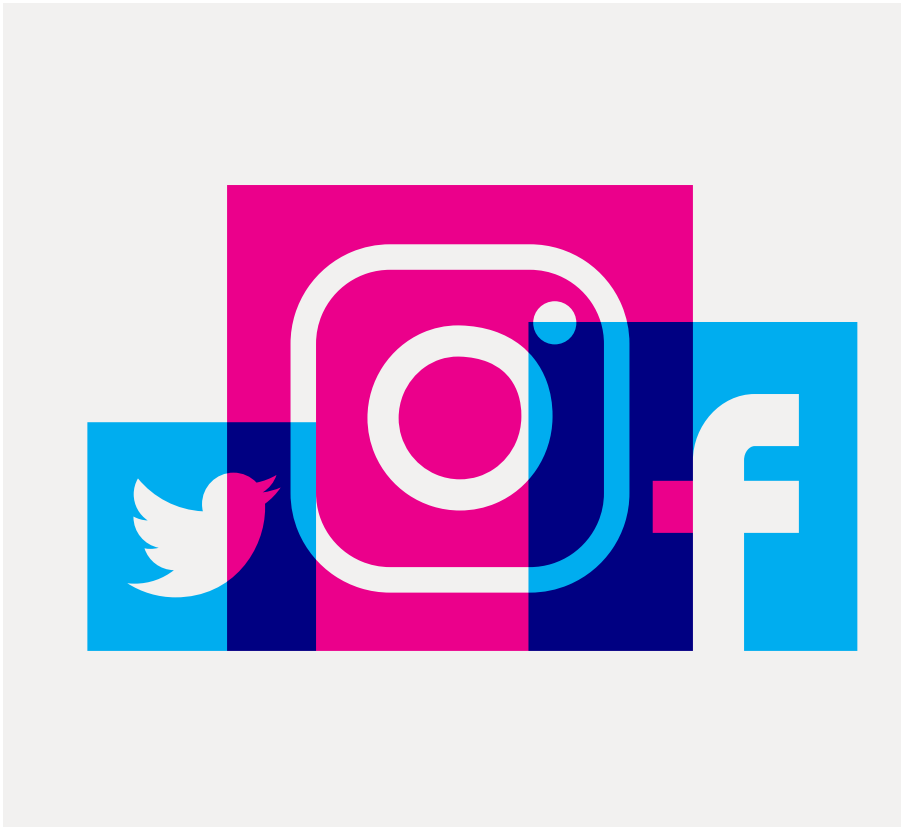
Spotlight Stats

Embrace parents by making them feel at home.

With so much change in their lives, busy parents are looking for cultural organizations that make both them—and their children—feel comfortable. Compared to non-parents, these audiences are 25% more likely to be motivated to participate by the promise of connecting with their community, and 19% more likely by a sense of welcome. While "having fun" is still their number one motivator (81% of parents are looking for this attribute, compared to 77% of non-parents), these secondary desires point towards the need for specific hospitality strategies to make sure parents' special needs are met.

To reach younger generations, meet them where they live.

When it comes to getting people in the door, what forms of marketing matter most to cultural consumers? While Ontarians as a whole say print and radio advertisements are most influential, for younger generations social media ads take the top spot, noticeably beating other more traditional media forms. Ontario Millennials also view print ads as less likely to inspire them to participate than radio or outdoor ads (such as billboards), and are more likely to be persuaded by ads on music streaming services and podcasts than older cultural audiences are.

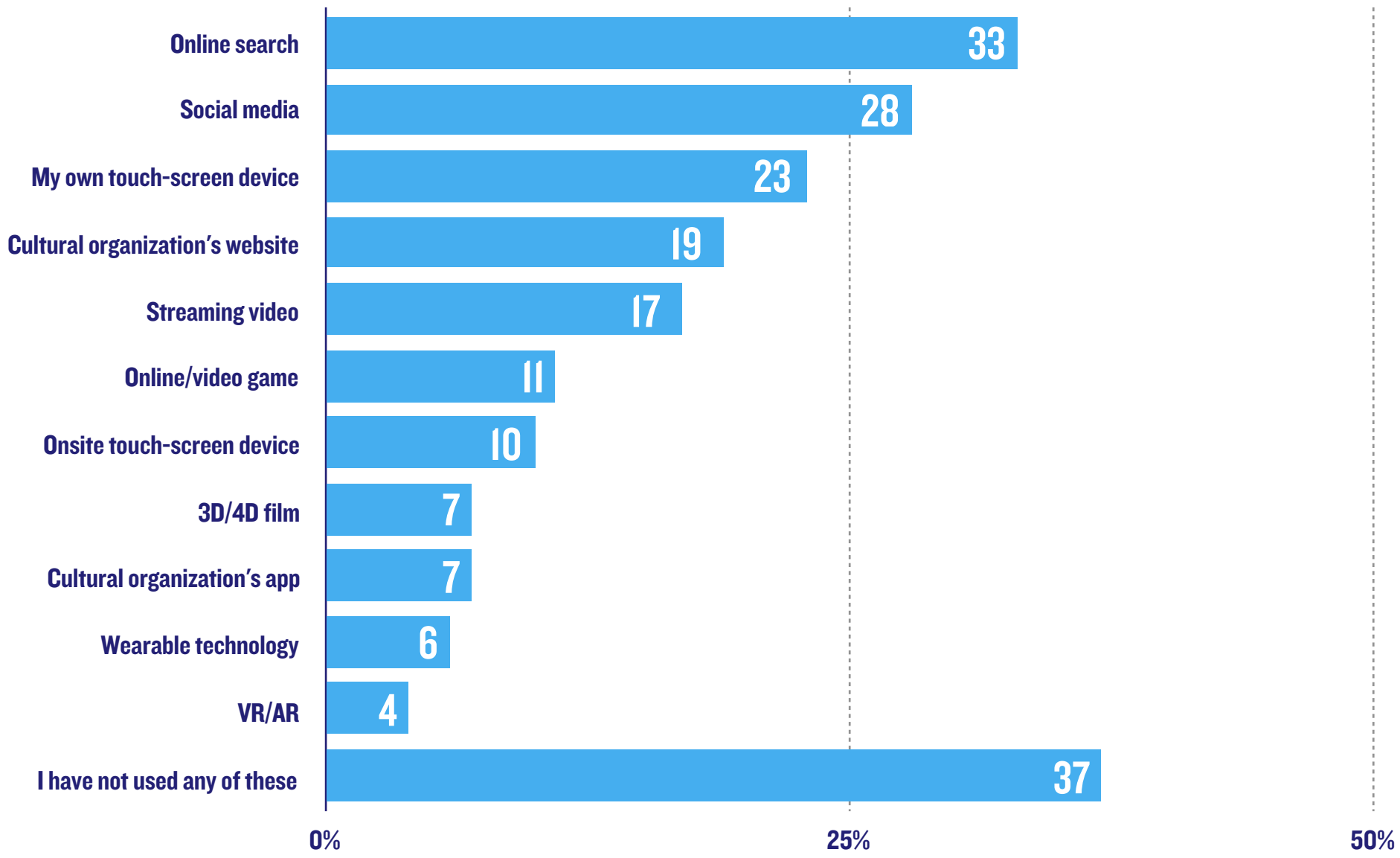


4

The Tech Lag

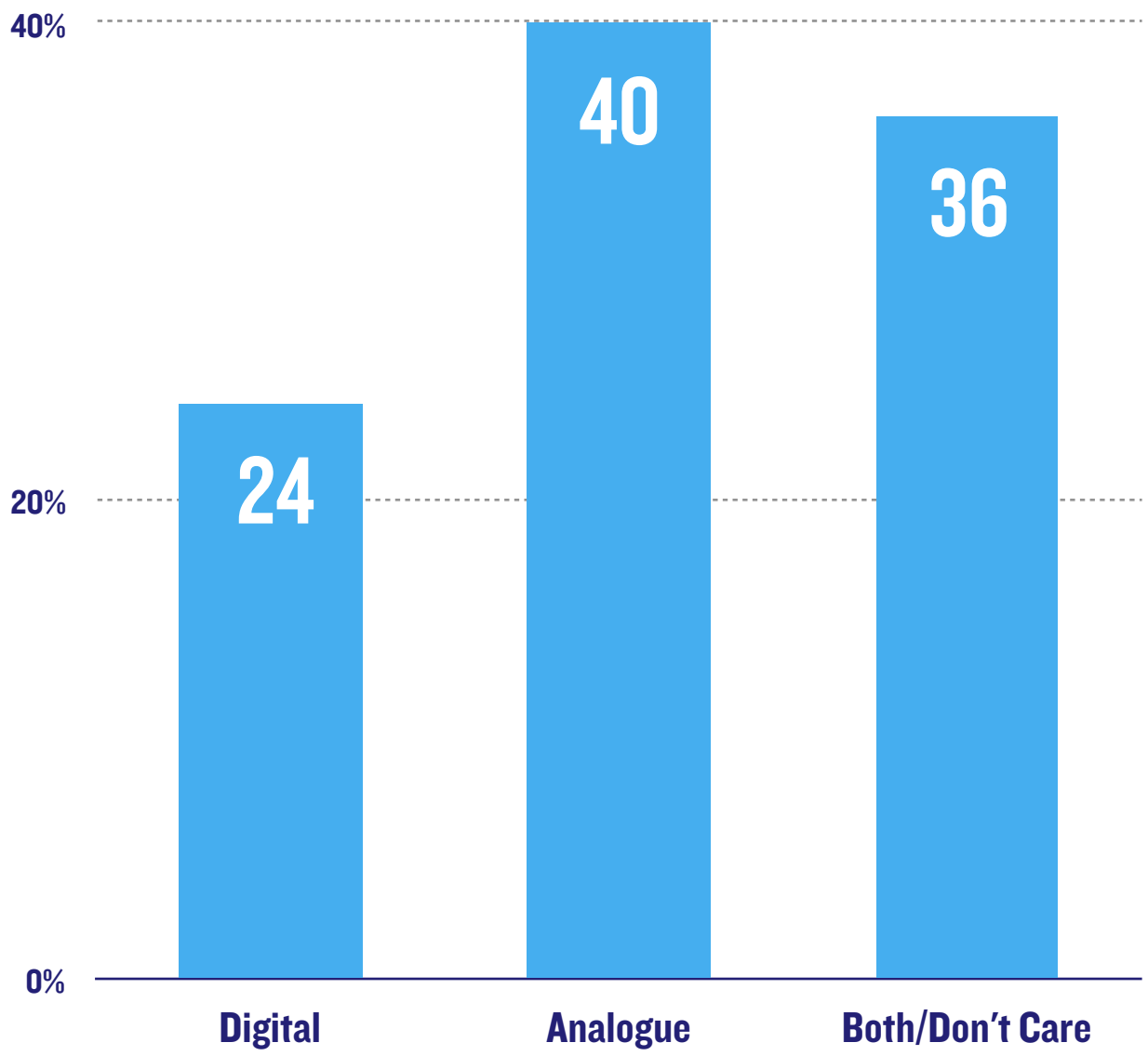
It goes without saying that digital technology has fundamentally revolutionized how we engage in nearly every aspect of society. From the way we consume information to how we communicate with others, technology has never been more omnipresent, with both large and small parts of daily life so often mediated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

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



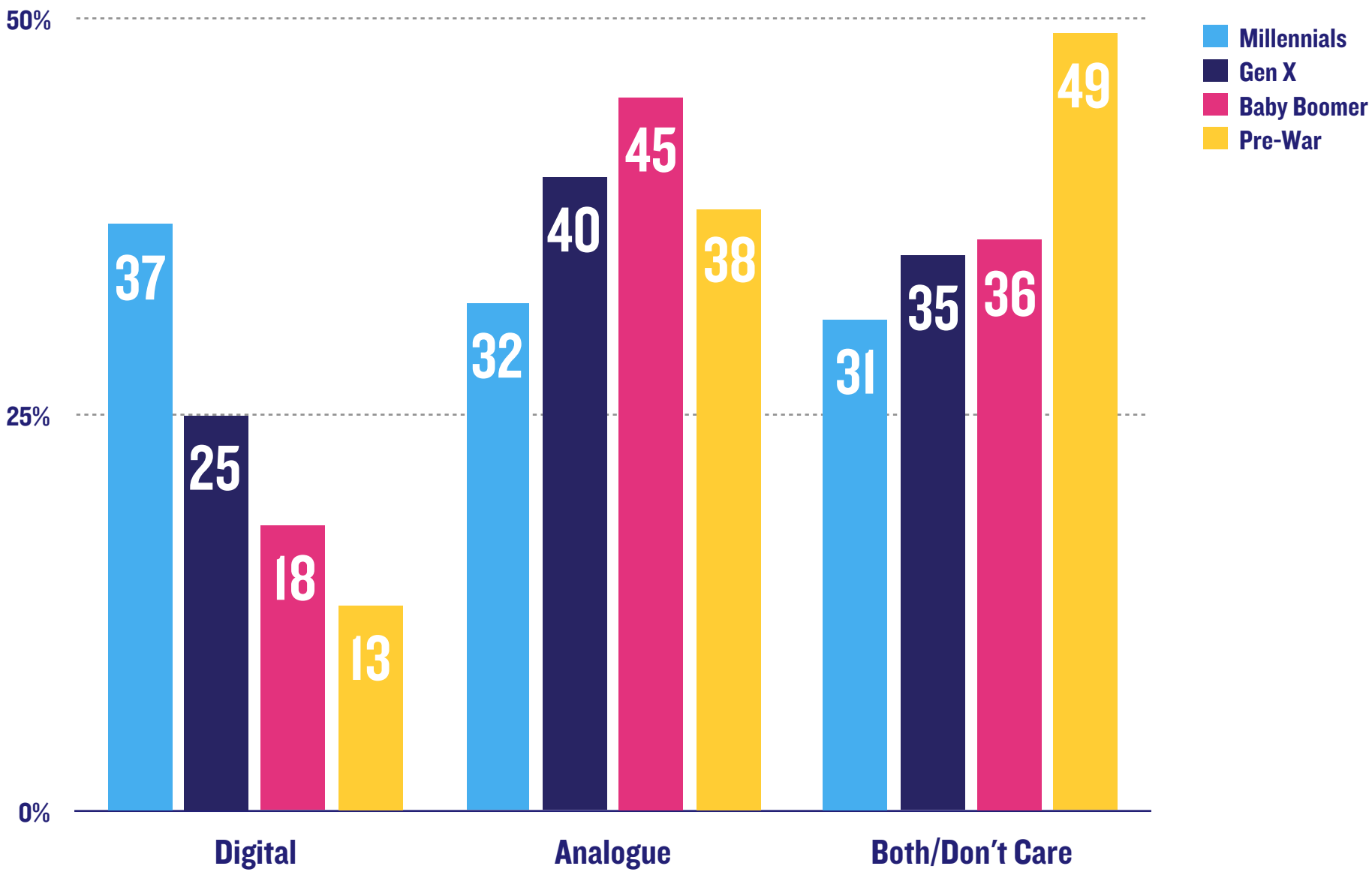
Yet despite its ubiquity, the role of digital technology within the cultural sector continues to be one of the field's most perplexing issues. In a moment of growing interest in (and funding for) increasingly high-tech digital solutions such as virtual reality or wearable technology, Ontario audiences in 2018 remain relatively low-tech. A third say they have turned to online search as part of a cultural activity in the past year, in comparison to only 7% who say they used a cultural organization's own app. Noticeably, a full 37% say they haven't used any digital tool as part of a cultural activity, implying a plurality of cultural consumers in Ontario have either not been exposed to digital technology within the cultural experience, or simply have not bought into its necessity.

Desire for Digital or Analogue Cultural Activities



Currently, Ontario cultural consumers are divided on whether technology should play a role in the cultural experience at all. Only about a quarter of Ontario audiences say they prefer a digitally-mediated cultural experience. In comparison, 40% say they prefer an analogue experience. What is probably most surprising is that nearly that same percentage of Ontario audiences don't have a strong opinion either way when it comes to deciding between digital or analogue. These findings are nearly perfectly consistent with attitudes toward digital technology from Canadian audiences nationally.

Desire for Digital or Analogue Cultural Activities



Notably, these opinions diverge based on generational lines. Millennials are far more interested in digitally-mediated experiences than older generations, while nearly half of Baby Boomers prefer an analogue experience, as do 40% of Gen Xers. And while only 13% of Pre-Wars firmly indicate they prefer digitally-mediated experiences, a full 49% say they're digitally agnostic, suggesting at the very least an openness to the possibility of digital interventions within the cultural experience.

Top Reasons Why Digital Appeals in Cultural Activities

1. Activity is shareable digitally
2. Deeper understanding of content
3. Access to more detailed info
4. Lets me experience remotely

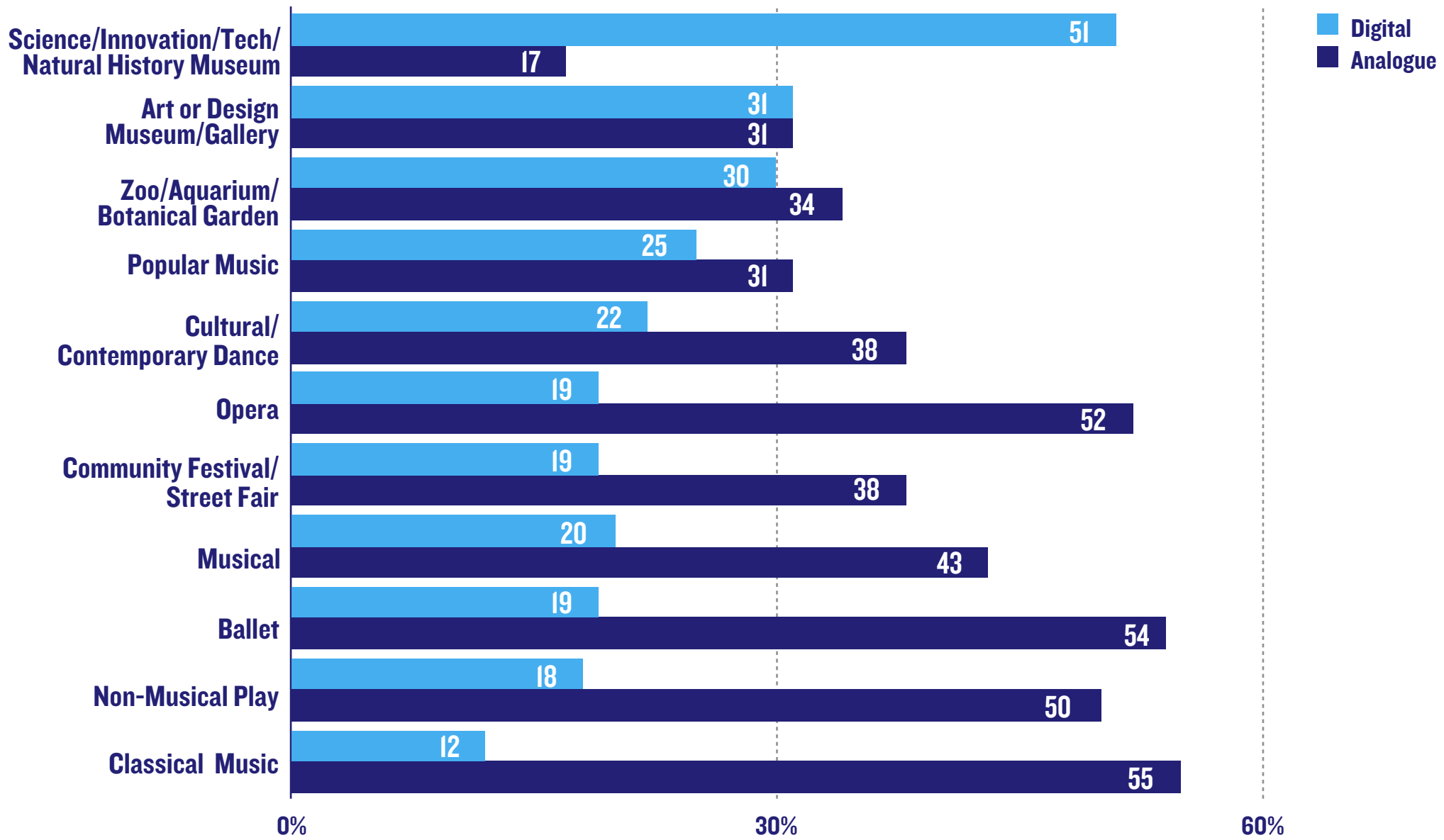
To better understand Ontario audiences' appetites for new forms of tech going forward, it will be crucial to more fully comprehend this divide in opinion. While there are variations from activity to activity, on average Ontario cultural consumers who find digital interventions in culture appealing appreciate, first and foremost, how these interventions can add to a new level of social engagement, allowing participants to share their experience with others. Audiences also like how digital tools can both provide an increased understanding of the content, as well as deepen the experience by curating additional information. These audiences are also drawn to tech's ability to transpose a physical, onsite experience to other places—for instance, allowing the user to watch a streamed performance from the comfort of home, or perhaps explore an exhibition online.

Top Reasons Why Analogue Appeals in Cultural Activities

1. More focus on the activity
2. More enjoyable
3. Feels more authentic
4. Is more comfortable to me

Equally interesting are the reasons why Ontario audiences find analogue cultural experiences appealing. For these individuals, a digitally-unmediated experience is simply more focused on the activity at hand, without any technological distractions, and therefore may be more enjoyable. Audiences also report that analogue activities feel more authentic to the way they believe the activity was meant to be experienced, a sentiment rooted in personal preference, perhaps because of previous, negative interactions with tech in a cultural context.

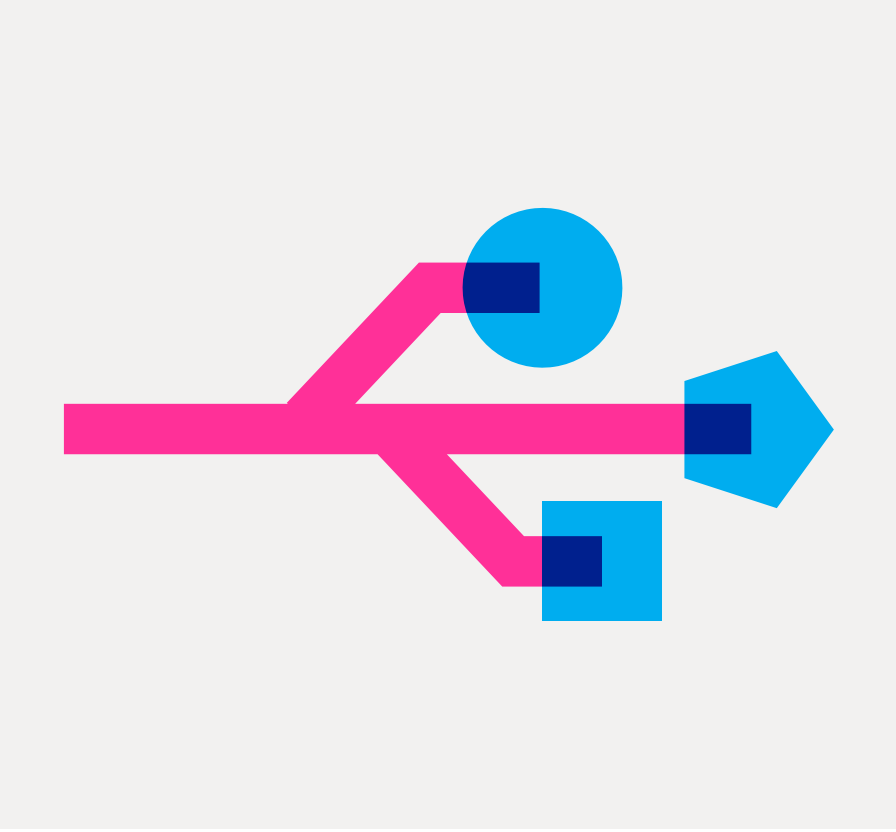
Interest in Digital or Analogue as Part of Cultural Activity



Ontario audiences' opinions on whether digital should have a place or not within the cultural experience are also highly specific to the type of activity in question. While audiences may welcome technology in, for instance, a natural history museum (the only activity where digital is highly desired), far fewer are yearning for it in activities like classical music or ballet.

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

Spotlight Stats



Digital can open the door for new audiences.

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

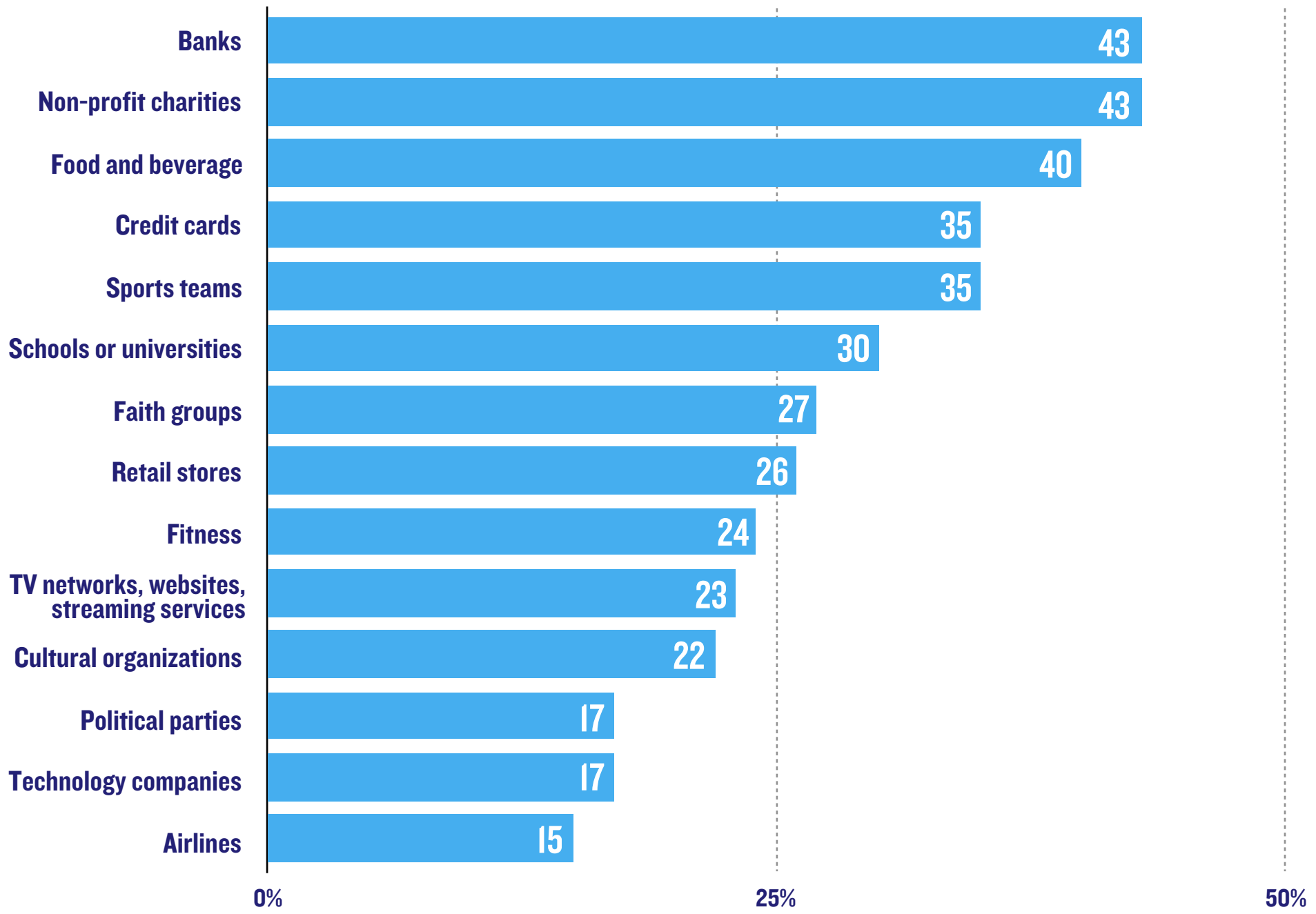
Any new tech may need an instruction manual.

While digital innovation continues to be top of mind for cultural organizations of all stripes, Ontario cultural leaders should recognize that residents of their province, even more so than national audiences, may be digital novices in certain areas. Ontarians as a whole are slightly more likely than Canadians—37% versus 33%, respectively—to say they haven't used any digital tools as part of a cultural experience in the past year (with the exception of Toronto, which is slightly below the national average at 31%). Further, while cutting-edge tech like AR, VR, 4D film and wearables may grab headlines, the vast majority of Ontario audiences, including Torontonians, have not used these technologies, whether as part of a cultural experience or in any other context.

5

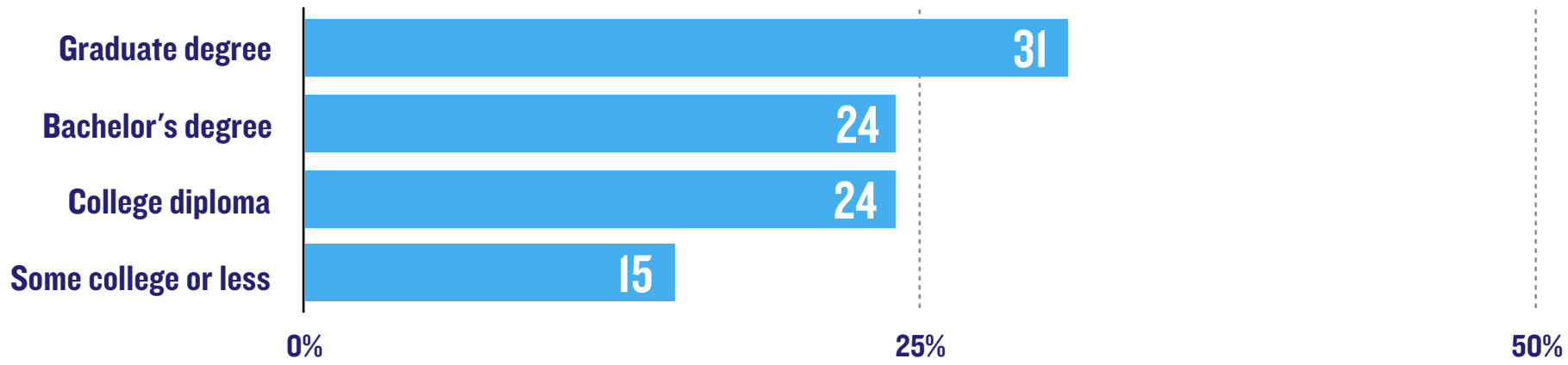
The Future of Affinity

Audience Personal Commitments

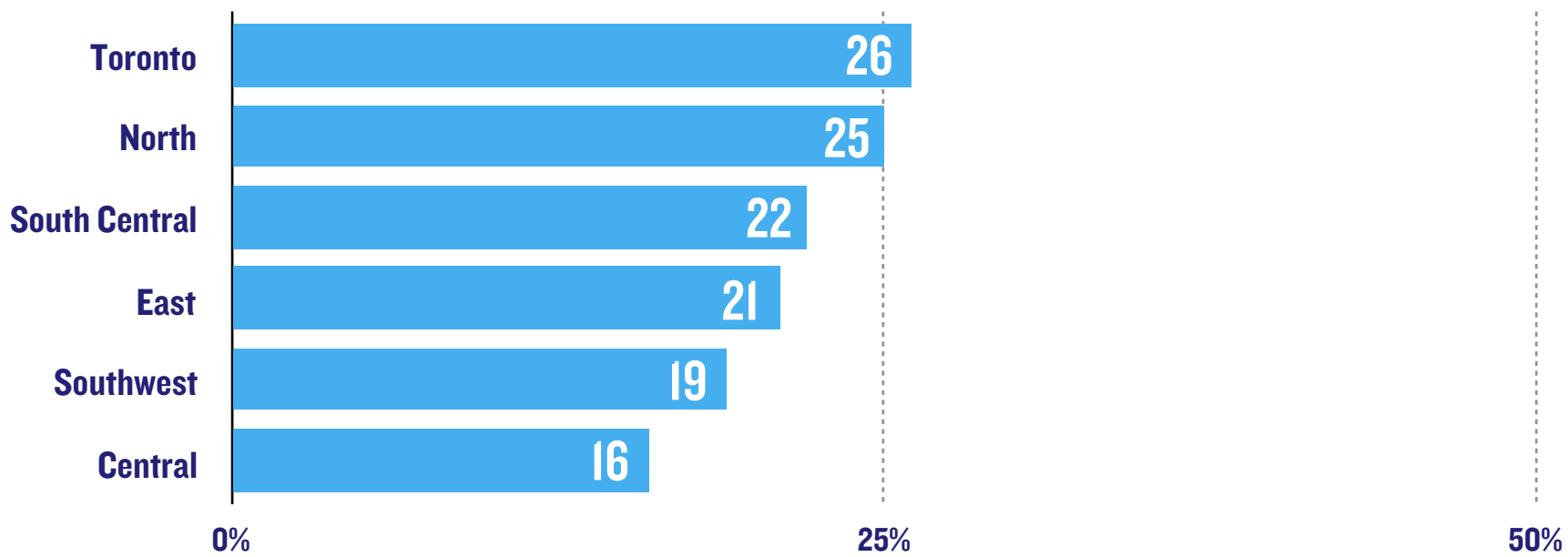


Every day, Ontario cultural consumers demonstrate affinity to a wide range of companies and organizations. Whether it be a favourite corner coffee shop where the barista knows their name or the sports team which they have season tickets to, everyone is personally committed to something—and each of these companies or organizations are competing for audiences' time, money, and attention. Crucially, in comparison to many of these companies or organizations, culture—even for these audiences who themselves identify as culturally active—is relatively low on the list, falling just above political parties, technology companies, and airlines. All of these percentages are consistent with those reported by Canadian audiences nationally, suggesting that this problem is not province-specific, but a sentiment held nationwide.

Audience Personal Commitments: Cultural Organizations



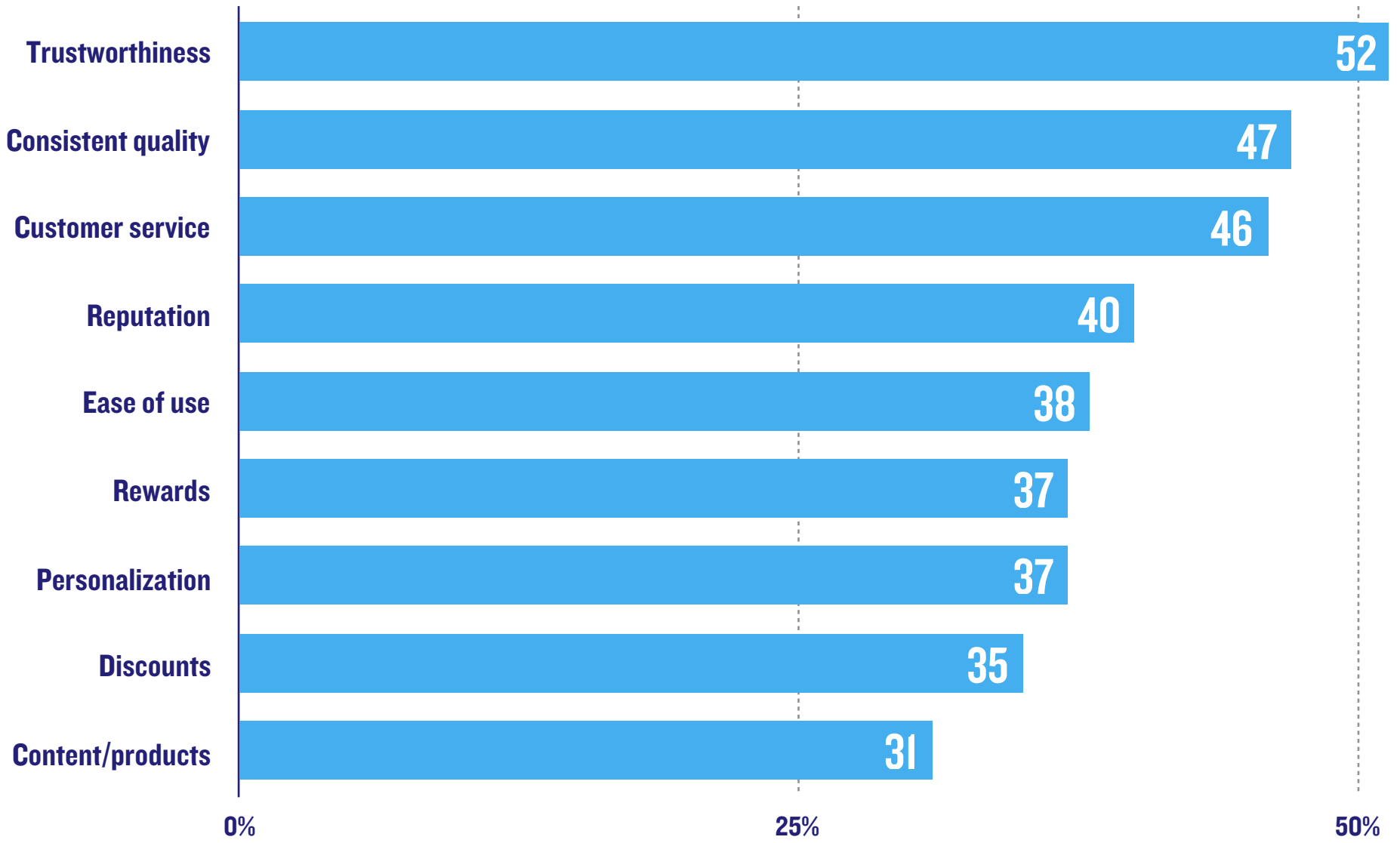
Audience Personal Commitments: Cultural Organizations



Who are these relatively few Ontarian cultural consumers who say they're *personally committed* to cultural organizations? Across certain demographic groups such as race, income, or generation, affinity for cultural organizations is relatively consistent. However, other factors, like level of education, show greater divergencies, with those who have obtained graduate degrees being far more likely to be personally committed to a cultural organization than others. Similarly, there are differences in affinity across regions, with approximately 1 in 4 Toronto and Northern residents reporting a personal commitment to a cultural organization, compared to 1 in 6 Central region residents.

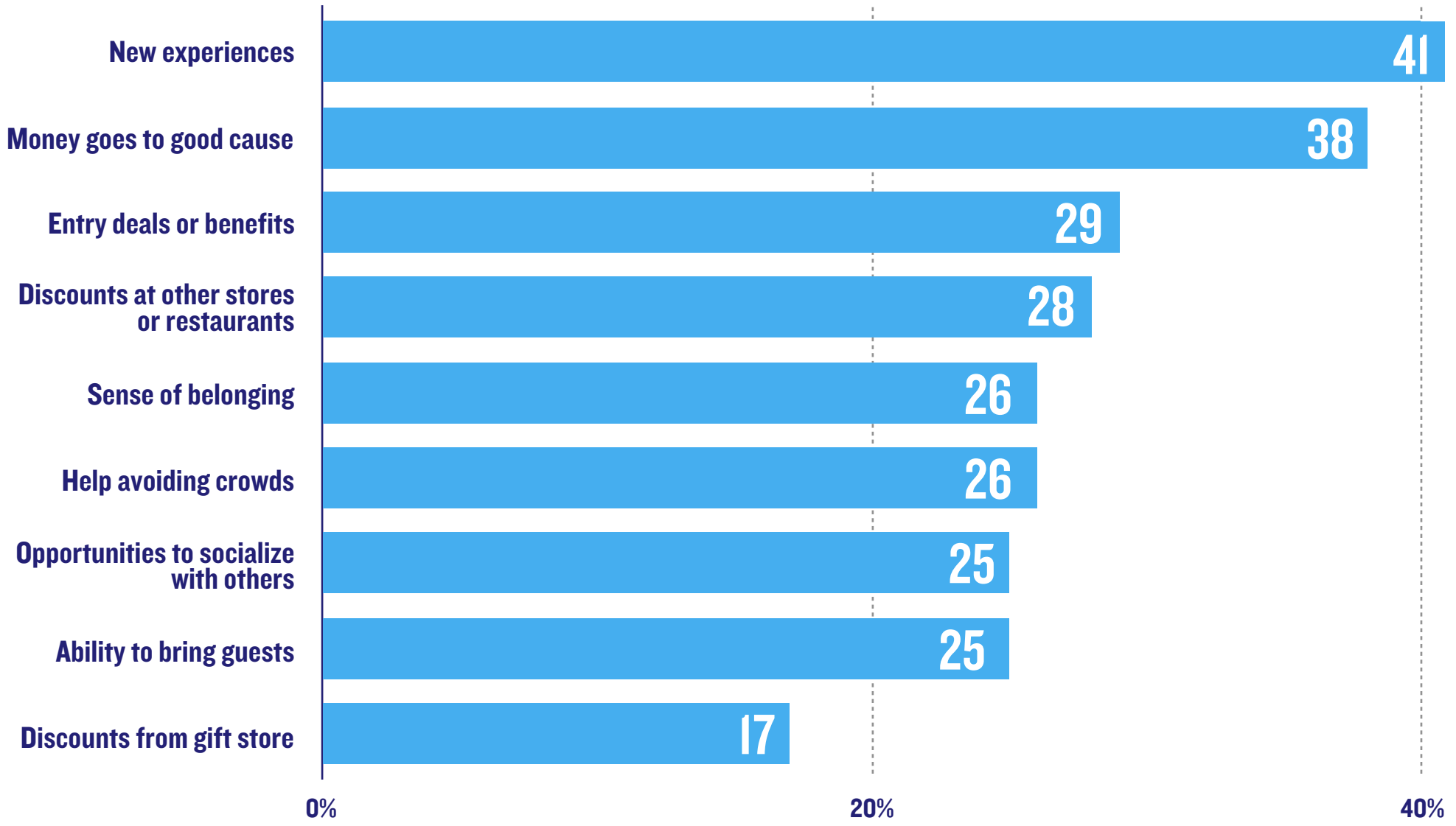
But to get to the root of why personal commitment to cultural organizations is so low—and why affinity for many other types of companies or organizations is comparatively higher—we assessed Ontario audiences' affinity behaviours from the "outside in," exploring relationships with entities beyond culture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

Motivators for Personal Commitment



As in Canada as a whole, we found in Ontario that the motivators for personal commitment go far beyond the economic and transactional. Ontario audiences view their affinity to an organization as a personal relationship, and their ideal partner is trustworthy (the top motivator, at 52%), consistent (with 47% citing "consistent quality"), and kind (with 46% citing "customer service"). These responses are generally consistent across demographic groups and Ontario's regions, and align with the top responses of Canadian cultural consumers at large.

Motivators for Joining a Cultural Loyalty Program



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

Spotlight Stats

For younger generations, a "like" goes a long way.

The types of companies or causes we rally around say a lot about us, but the way we show our support is telling as well. Compared to older generations, Ontario Millennial cultural consumers are more than twice as likely (and even more so than Canadians as a whole) to express their personal commitment to a company or organization by engaging with it on social media, an authentic act of affinity that should be acknowledged. Younger generations in Ontario are also less likely to report being a part of a customer loyalty program, volunteering, or donating money—implying that these traditional avenues for affinity-based engagement may not be as relevant to them.

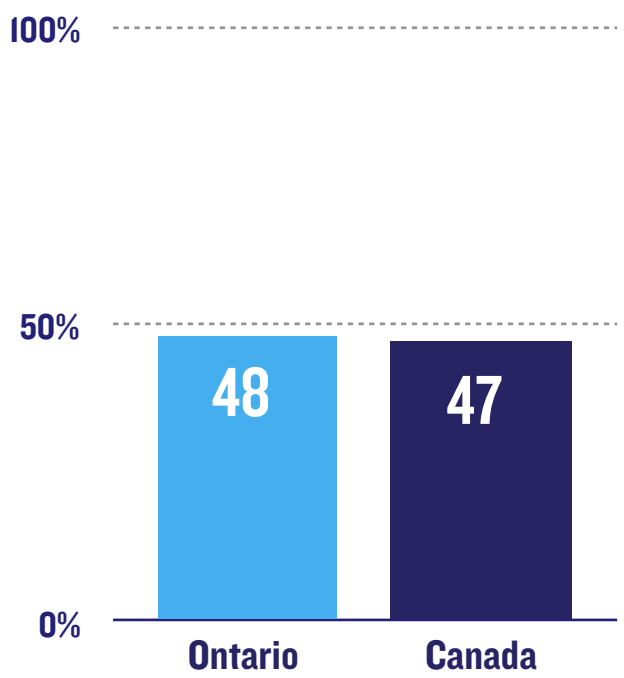
New Ontarians can be part of your long-term community.

While affinity to cultural organizations may be low for Ontarians at large, bright spots can be found within certain audience segments that shouldn't be ignored. For instance, those cultural consumers in the province who identify as first-generation immigrants are approximately 40% more likely to say they're personally committed to cultural organizations than are other Ontarians.

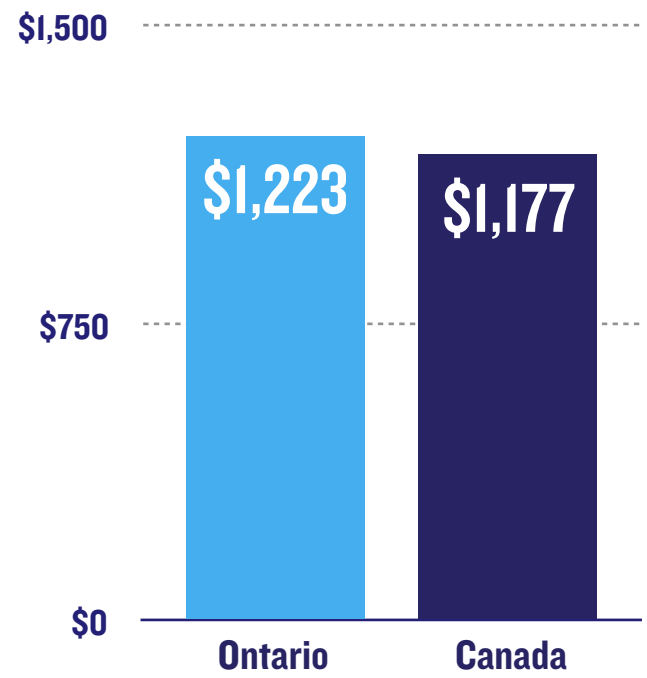
6

The Giving Gap

Donate to Charities or Organizations

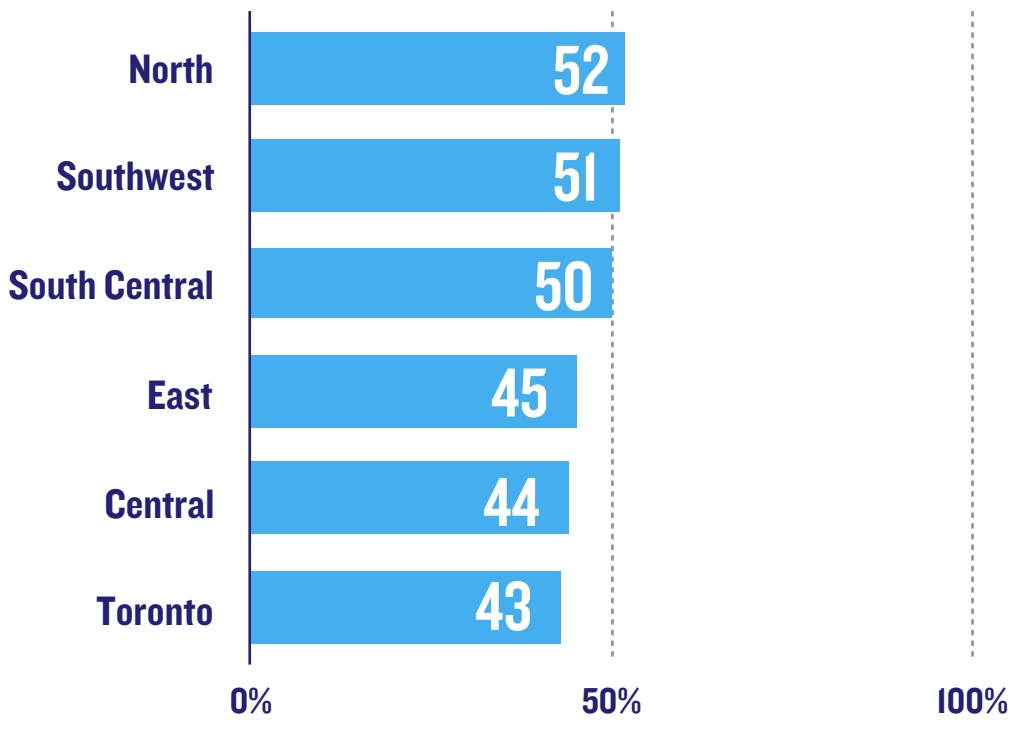


Average Annual Donation



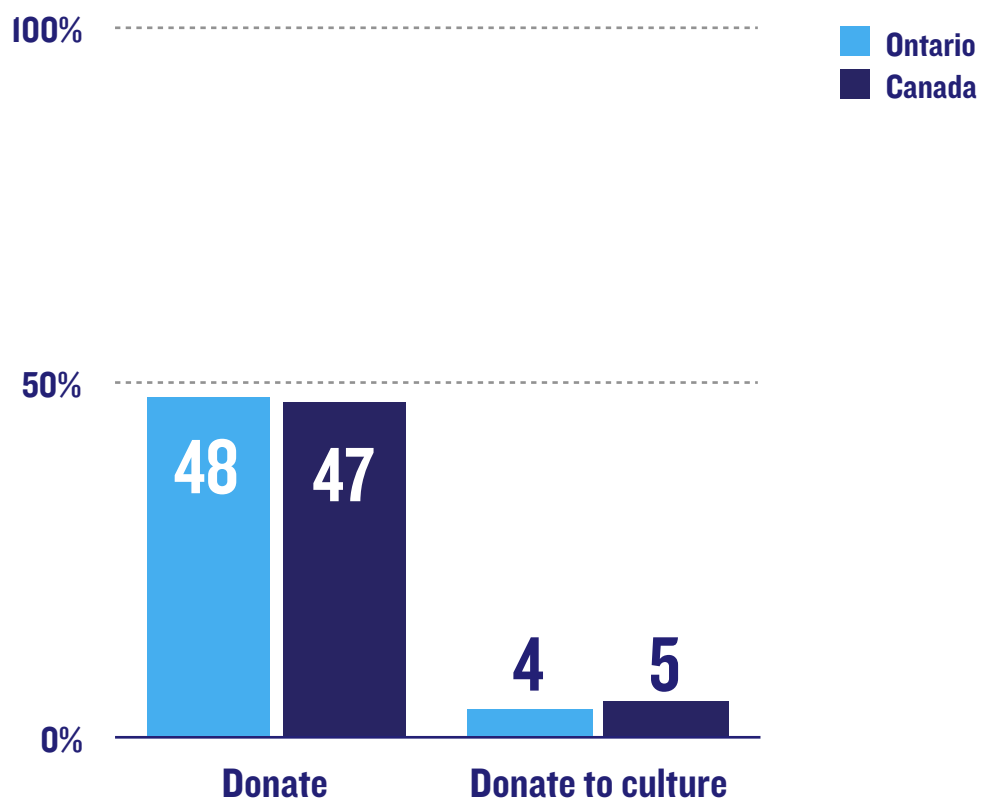
When it comes to giving back, Canadians are known for their generosity, and Ontarians are no different. Nationwide, 48% of Ontario cultural consumers say they donated to charities or organizations in the past year—a percentage nearly equal with national data—and give more than the national average, at $1,223 annually per person.

Donate to Charities or Organizations



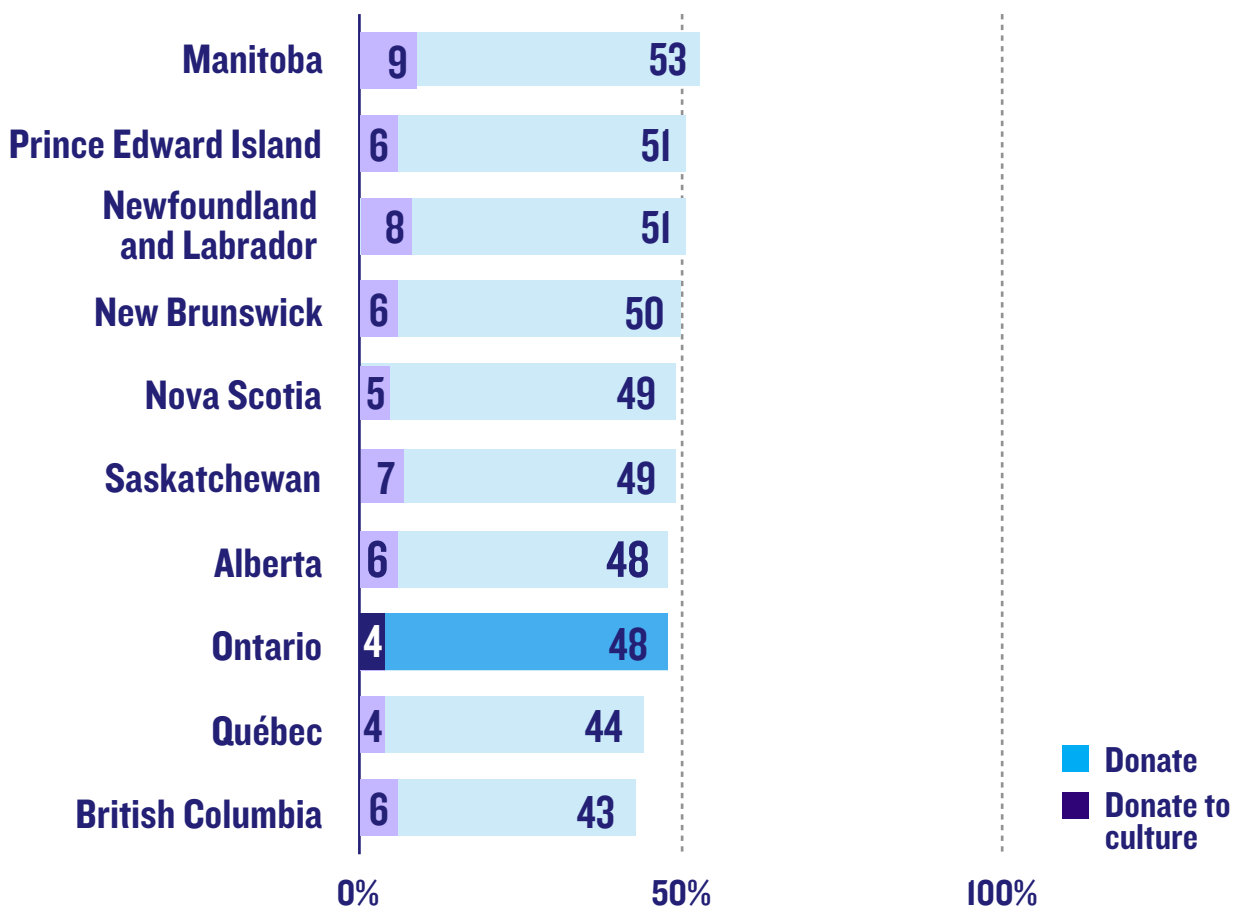
Within Ontario, who gives is related to a number of factors. Unsurprisingly, older audiences, and those with higher incomes, are more likely to be donors. There are also differences amongst Ontario's regions, with those in the North most likely to say they've donated in the past year, and those in Toronto the least.

Donate to Charities or Organizations



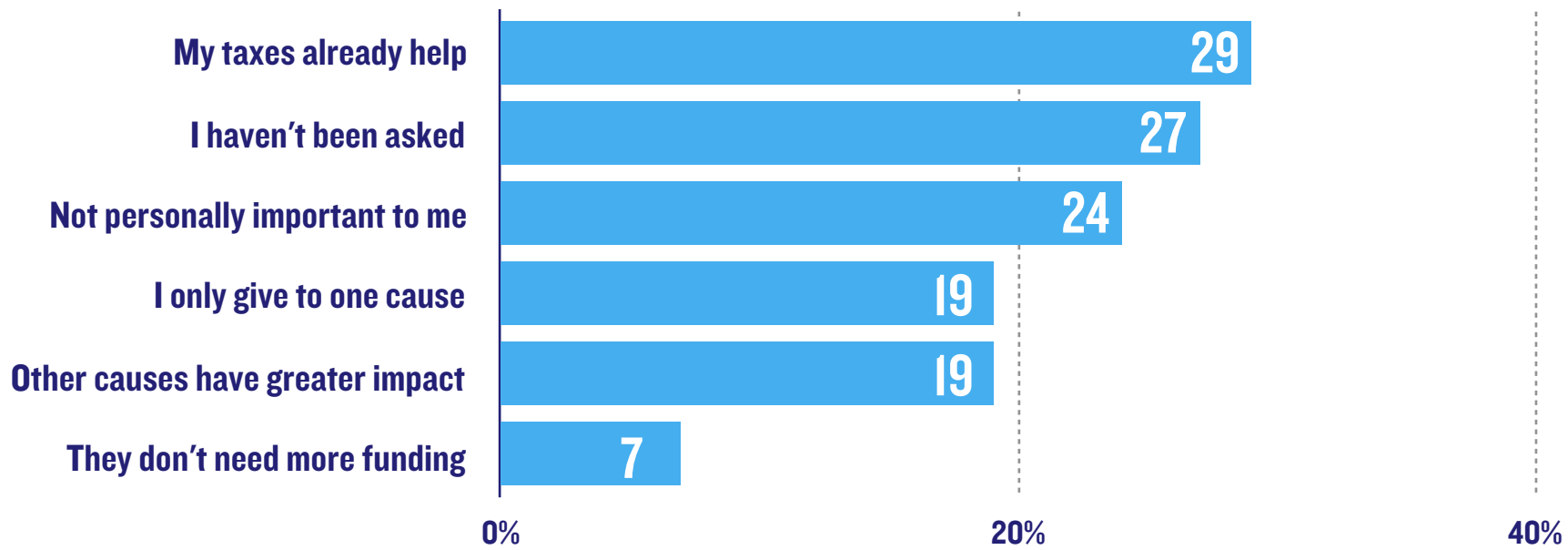
But what do Ontario cultural consumers actually give to? Unfortunately, it's often not culture. While 48% of Ontario audiences say they give to charities or organizations of any type, only 4% say they give specifically to culture (a percentage point consistent with Canada nationwide, where only 5% say they give to culture).

Donate to Charities or Organizations



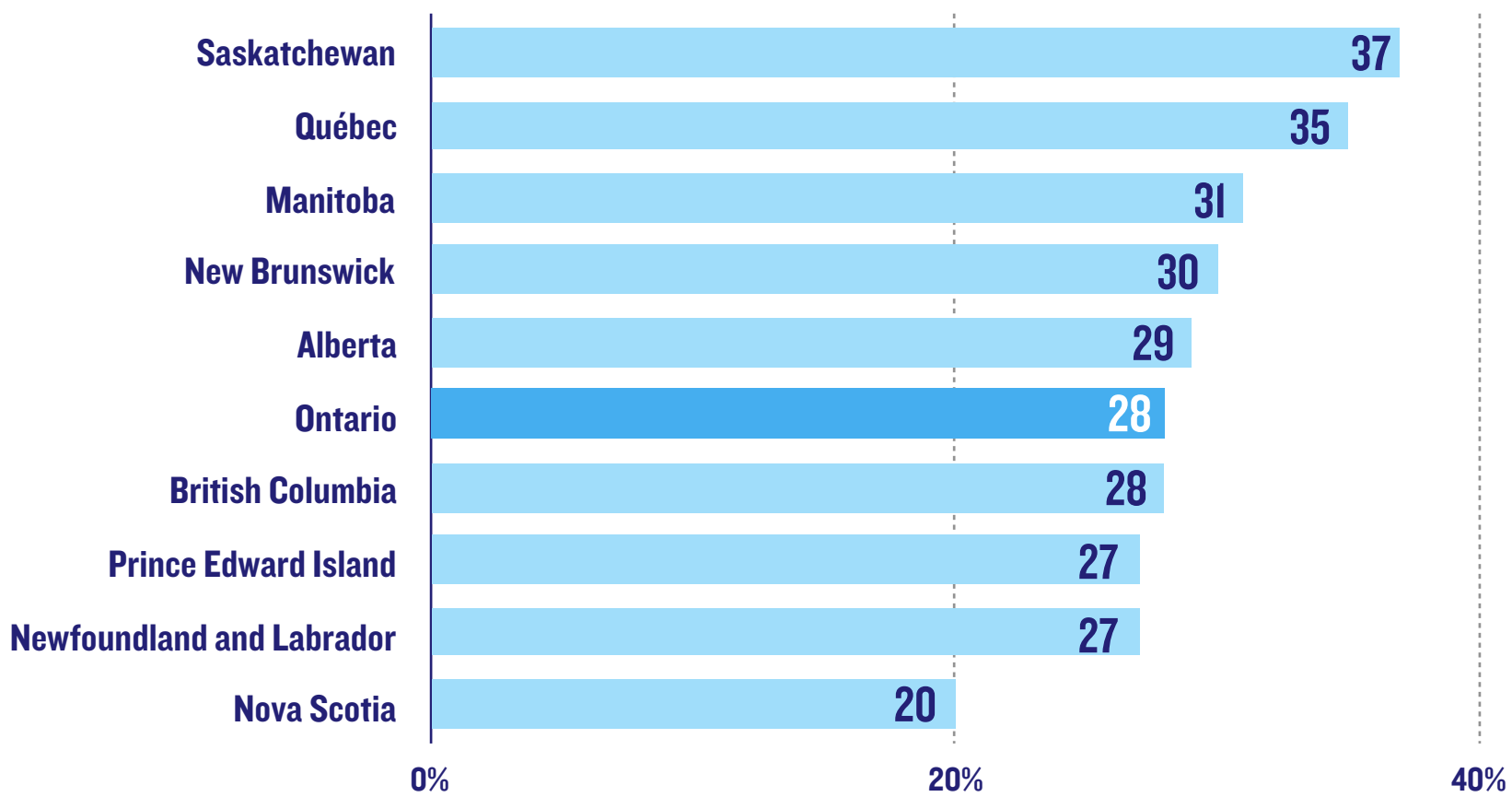
And while there are real differences in rates of giving on the provincial level, the overall picture for Ontario and Canada is the same: Audiences are philanthropically generous, but culture is rarely their priority.

Reasons for Not Donating to Culture



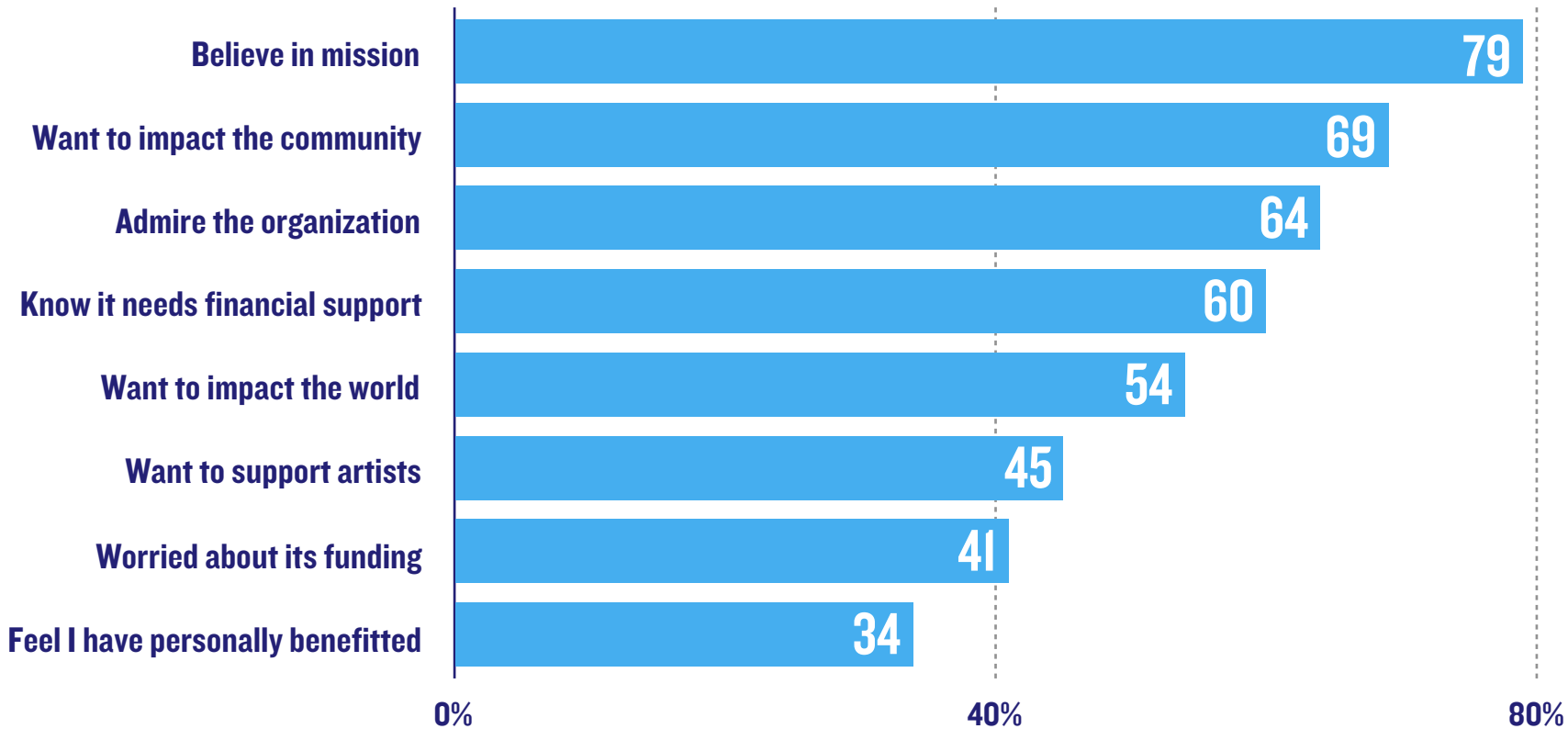
What might be behind this gap? The perception of governmental support is one crucial reason why Ontario audiences don't donate to culture. An opinion driven by Baby Boomers in particular, 29% of non-donors say they don't give to culture because they believe their taxes already help, followed just behind by "I haven't been asked."

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



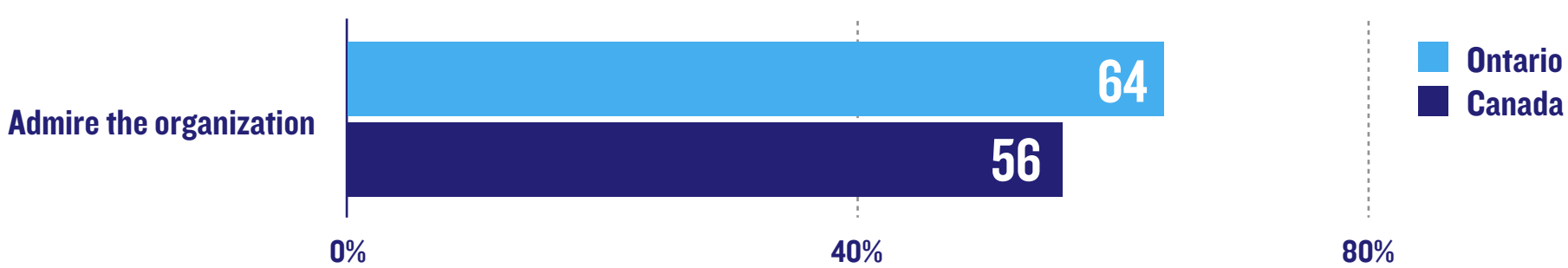
This perception isn't, however, endemic to Ontario; on the contrary, the province is in line with the national average.

Motivators for Donating to Culture



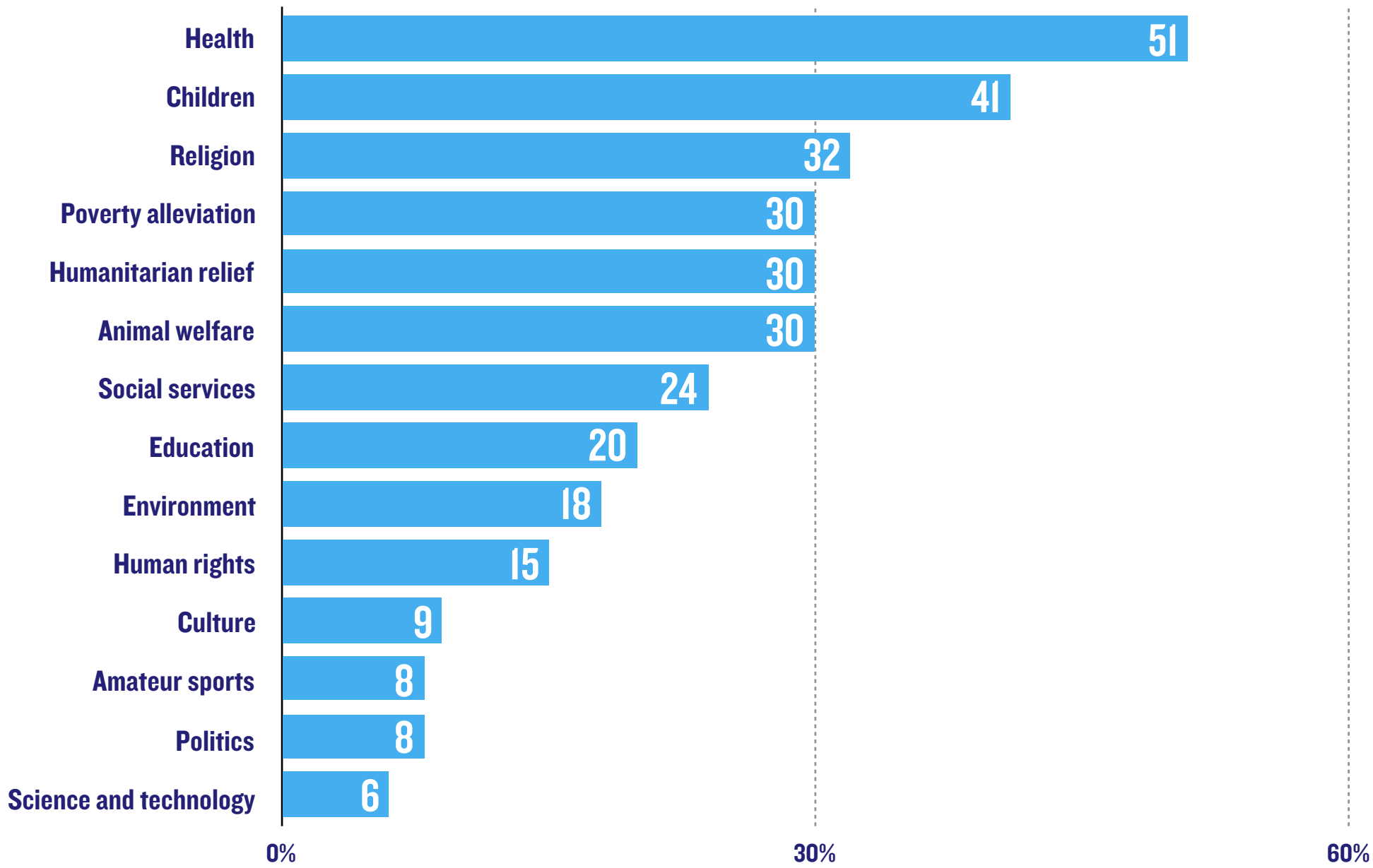
On the flip side, Ontario audiences who *do* donate to cultural organizations see one key factor as their main motivator: social impact. These donors are more inclined to contribute funds when they believe in an organization's mission or believe their dollar can impact the community.

Motivators for Donating to Culture



In general, these responses are consistent with findings from Canada as a whole, with the exception of "Admire the organization." Ontario cultural consumers are 14% more likely than national audiences to cite a general affinity for the organization as a key motivator for giving, pointing to the specific need for the provinces' cultural organizations to build awareness for the positive, admirable work that they do as a strategy for earning philanthropic support.

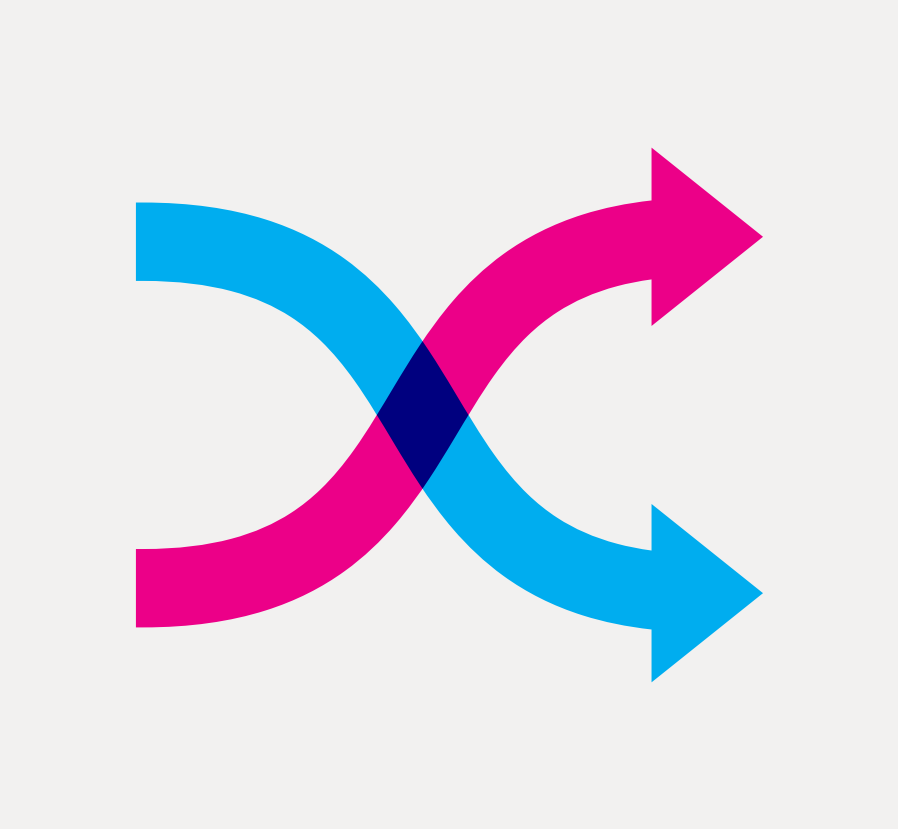
Comparative Appeal by Philanthropic Cause



The types of causes Ontario audiences donate to the most, such as health, children, and poverty alleviation, are not so different than ones favourited by Canadian audiences nationwide, and are ones with clear, measurable impact around the urgency of their need—or, in the case of religion, often affect these areas indirectly through donations or missionary work. While it may be no surprise that causes with such critical and tangible impact on wellness and prosperity top the list, that shouldn't preclude the cultural community from making a case for culture's indelible impact within these areas, or from finding ways to prove culture's own essential role in nurturing belonging, empathy, and perspective.

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

Spotlight Stats

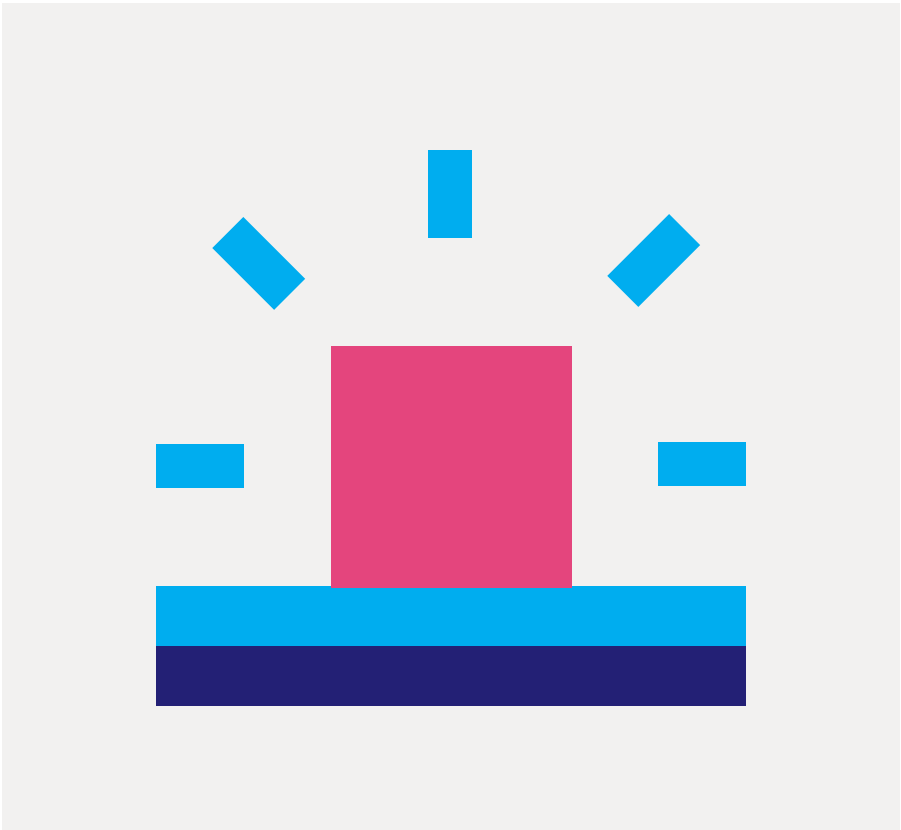


Social change inspires young philanthropists.

While older generations may have more disposable income to donate now, that doesn't mean younger donors should be discounted. In fact, these budding patrons have distinctive giving priorities that cultural organizations should take note of. Two causes uniquely near and dear to their hearts? Human rights and equality. Approximately a fourth of donors 35 and under (n=69) give to human rights, making them almost twice as likely than Gen-Xers, Baby Boomers, and Pre-Wars collectively to give to these types of causes (only 13% of older generations say they give to human rights causes). The difference is even greater for causes relating to equality: 19% of young Ontario donors give to these causes, compared to only 6% of older generations.

Corporate sponsorship makes business sense.

As competition for contributed dollars becomes increasingly fierce, cultural organizations must better articulate the business benefits of sponsorship to corporate funders, both in Ontario and in Canada as a whole. Thankfully, when approaching potential sponsors Ontario organizations can assert that cultural consumers feel positively about corporations who sponsor culture: 52% say they feel good about doing business with corporations that support cultural organizations, 35% say they're more likely to buy from those corporations, and 33% say they're more likely to listen to their message.



7

Conclusion: Five Key Takeaways

1 Purpose

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

2 Relevance

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

3 Connection

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

4 Relationships

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

5 Impact

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

CULTURE TRACK