

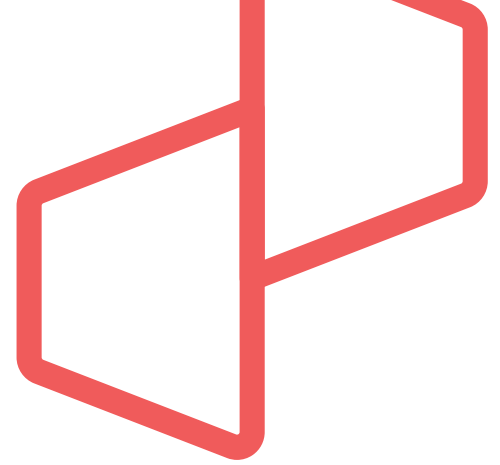
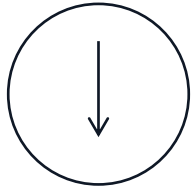
**Elevent**

# Perspectives Canada 2023

Fifth edition  
Pan-Canadian general public study  
April 2023



# Summary



## Context and objectives

The sponsorship industry has been booming since 2019. Practices and partnerships are evolving faster than ever before, flagship properties' status is being questioned, so-called niche properties now offer great opportunities, and finally, the consumption habits of fans and festival-goers have drastically changed since the end of the pandemic.

Perspectives aims to be a decision-making tool for industry players. It is an exclusive research program by Elevant, based on online surveys conducted with Canadians aged 18 and older. These surveys are carried out once or twice a year.

Unique in its kind, the study highlights data on the consumption of cultural and sports products, attitudes towards corporate social responsibility, perception of companies and their role as event sponsors, as well as general consumption trends. All this is done to provide brands with insights into the performance of their sponsorships and relevant information on the development of their current and future sponsorships.

This fifth edition of Perspectives is particularly important as it paints the first picture of the consequences of the pandemic on our industry. As usual, this edition of Perspectives focuses on differences in behaviors and attitudes among generations, as well as between Quebecers and Canadians from other provinces. It also takes a closer look at the behaviors and attitudes of people who attend festivals and professional sports events.

# Methodological summary



## Sample

This study is based on an online survey of Canadians aged 18 and over. A total of 3308 interviews were completed.



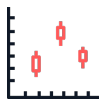
## Dates

The survey was conducted from February 9<sup>th</sup> to 20<sup>th</sup> 2023.



## Weighting

Results were weighted using Statistics Canada's data and on the basis of age, gender, language, place of residence and level of education of respondents.



## Margin

The maximum margin of error is  $\pm 1,7$  with a confidence level of 95%.

Statistically significant differences are identified in **green** (positive) or **red** (negative).

# Presentation of the results

The results of the study are presented in the following table, which, for comparison purposes, groups respondents according to the **number of festivals and professional sports events attended in person** during a year: 0=non; <1 less than 1 per year; 1+ at least one per year.

Respondent are also presented based on **age group (generation<sup>1</sup>)** and according to the region of residence namely **Quebec compared to the rest of Canada**

		Annual attendance						Generation				Region	
		Festivals			Sports Events			Gen Z	Mill.	Gen X	Baby Boomers	Québec	Other provinces
(%)	Total	0	<1	1+	0	<1	1+	18-24	25-44	45-54	55+		s

<sup>1</sup> Since the survey asks for age category rather than exact age or year of birth, the generational definitions do not exactly correspond to the definitions commonly used. For example, Generation Z consists of individuals who are 26 years old or younger, Millennials are defined as individuals aged between 27 and 42, Generation X is formed by individuals aged between 43 and 58, while Baby Boomers are aged between 59 and 75.

# Causes



# Social Responsibility

## Most important socio-economic issues.

Base: Canadian respondents

1/2

	n=	3 308	Generation				Region	
			Gen Z	Mill.	Gen X	Baby-boomers	Québec	Other provinces
			18-24	25-44	45-54	55+		
<b>Health and Wellness</b>	46	<b>30</b>	<b>34</b>	48	<b>60</b>	<b>58</b>	42	
<b>Mental Health</b>	34	36	40	39	<b>26</b>	30	<b>35</b>	
<b>Education</b>	33	<b>37</b>	<b>36</b>	32	30	<b>45</b>	30	
<b>Children and Youth</b>	30	24	<b>36</b>	<b>31</b>	25	26	<b>31</b>	
<b>Fight against climate change</b>	27	<b>32</b>	21	21	<b>32</b>	<b>31</b>	26	
<b>Environmental Protection</b>	23	20	20	21	<b>28</b>	<b>28</b>	22	
<b>Animal Welfare</b>	22	20	21	24	22	17	<b>23</b>	
<b>Respect for Human Rights</b>	19	22	19	18	18	20	18	
<b>Giving back to the community</b>	16	12	18	16	14	7	<b>18</b>	

Health, wellness, and mental health are among the most important causes in the country. The older population generally focuses more on health and wellness, while younger individuals emphasize mental health.

Québec places a higher priority on education, combating climate change, and environmental protection compared to the rest of Canada, which tends to focus more on children and youth, animal welfare, and community giving.

Concerns about the planet are not limited to the young. The fight against climate change is as significant for Gen Z as it is for baby boomers (32%). In fact, baby boomers place even more importance on environmental protection (28%) than the younger generation (20%).

## Social Responsibility

# Most important socio-economic issues. 2/2

Base: Canadian respondents

	n=	Total	Generation				Region	
			Gen Z	Mill.	Gen X	Baby-boomers	Québec	Other provinces
			18-24	25-44	45-54	55+		
		3 308	331	1 113	544	1 320	1 545	1 763
<b>Addictions (drugs, alcohol, gambling)</b>		11	15	10	11	11	5	13
<b>Emergency Relief</b>		10	10	10	10	10	8	11
<b>Arts and Culture</b>		7	9	9	6	5	6	7
<b>Gender equality and social inclusion</b>		6	8	8	5	5	6	6
<b>Promotion of Active Lifestyle</b>		6	8	6	6	5	4	6
<b>First Nations' rights</b>		5	7	4	6	5	3	6
<b>LGBTQ+'s rights</b>		3	6	5	2	2	3	4
<b>International Involvement</b>		3	4	2	3	3	2	3

Of the following social and economic issues, what are, in order, the 3 that are most important to you?



# Corporate social responsibility (CSR)



## Social Responsibility Familiarity with the concept

Base: Canadian respondents

Two third of Canadians say they are familiar with the concept of Corporate social responsibility. In Québec, only one in two say the same.

	n=	Total	Generation				Region	
			Gen Z 18-24	Mill. 25-44	Gen X 45-54	Baby Boomers 55+	Québec	Other provinces
	3308		331	1113	544	1320	1545	1763
<b>Very familiar</b>	14		14	18	12	10	10	<b>15</b>
<b>Somewhat familiar</b>	49		46	47	52	51	41	<b>52</b>
<b>Unfamiliar</b>	26		26	23	24	29	<b>37</b>	23
<b>Not at all familiar</b>	11		13	12	12	10	13	11
<b>Total familiar</b>	63		60	65	64	61	<b>51</b>	67

A socially responsible company is one that has the respect of its customers, employees and suppliers at heart, follows a code of ethics, imposes social and environmental criteria on itself and generally contributes to the social and economic harmony of society.

Before answering this survey, how familiar were you with the concept of corporate social responsibility?

Social Responsibility

# Choose to do business with a company socially responsible

Base: Canadian respondents

	n=	Total	Generation				Region	
			Gen Z	Mill.	Gen X	Baby Boomers	Québec	Other provinces
			18-24	25-44	45-54	55+		
		3308	331	1113	544	1320	1545	1763
<b>Yes, I have</b>		25	23	27	23	24	24	25
<b>I've thought about it, but I haven't done it</b>		15	19	19	14	11	11	16
<b>No, I haven't</b>		23	18	19	26	27	15	25
<b>Not familiar with CSR</b>		37	39	35	37	39	49	33

A quarter of the population has already chosen to do business with a company solely for its virtues in terms of social responsibility.

## Social Responsibility

# Refuse to do business with a company not socially responsible

Base: Canadian Respondents

	n=	Total	Generation				Region	
			Gen Z	Mill.	Gen X	Baby Boomers	Québec	Other provinces
			18-24	25-44	45-54	55+		
			331	1113	544	1320	1545	1763
<b>Yes, I have</b>		28	27	30	27	26	25	28
<b>I've thought about it, but I haven't done it</b>		17	21	21	15	14	12	19
<b>No, I haven't</b>		18	12	15	22	21	13	20
<b>Not familiar with CSR</b>		37	39	35	37	39	49	33

Slightly more than a quarter of the population has already refused to do business with a company that was not sufficiently socially responsible.

## Social Responsibility As purchasing criterion - Frequency

Base: Canadian respondents

	n=	Total	Generation				Region	
			Gen Z	Mill.	Gen X	Baby Boomers	Québec	Other provinces
			18-24	25-44	45-54	55+		
		3308	331	1113	544	1320	1545	1763
<b>All the time</b>		4	6	5	3	3	3	4
<b>Regularly</b>		16	21	18	13	15	16	16
<b>Sometimes</b>		25	21	28	27	24	19	27
<b>Rarely</b>		12	7	9	15	15	8	13
<b>Never</b>		6	5	6	6	6	5	6
<b>Not familiar with CSR</b>		37	39	35	37	39	49	33
<b>Occasionally and +</b>		45	48	51	43	42	38	47

Only 4% consider « All the time» Social Responsibility as a purchasing criterion, against 16% who do regularly and 25% occasionally.



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