



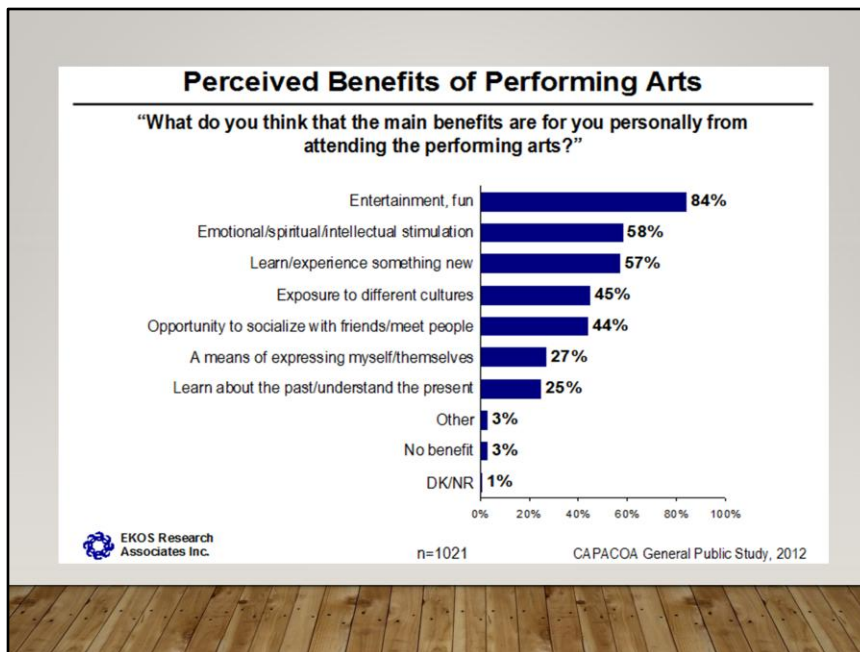
SLIDE 1: INTRODUCTION SLIDE

- Provide overview of CAPACOA and Arts in Perspective Series
 - CAPACOA serves the performing arts touring and presenting community through its commitment to integrate the performing arts into the lives of all Canadians.
 - CAPACOA seeks to be a catalyst for innovation in the performing arts. We engage in or support research projects that can generate new perspectives on the presentation of the performing arts.
 - Learn more by subscribing to CAPACOA's ALL ACCESS newsletter via their website at www.capacoea.ca
- We are experimenting with ways to be as interactive as possible so at any point during the presentation feel free to use the question box to pose a question, share your own resources or insights. As an example – what role do you identify as
- **POLL:** Please tell us about you. Are you primarily?...
 - Presenter/promoter/festival
 - Performing arts company
 - Agent/manager
 - Arts service organization
 - Municipality
 - Funder



SLIDE 2: OVERVIEW OF STATISTICS THAT IDENTIFY SOCIAL FACTORS OF ARTS PARTICIPATION

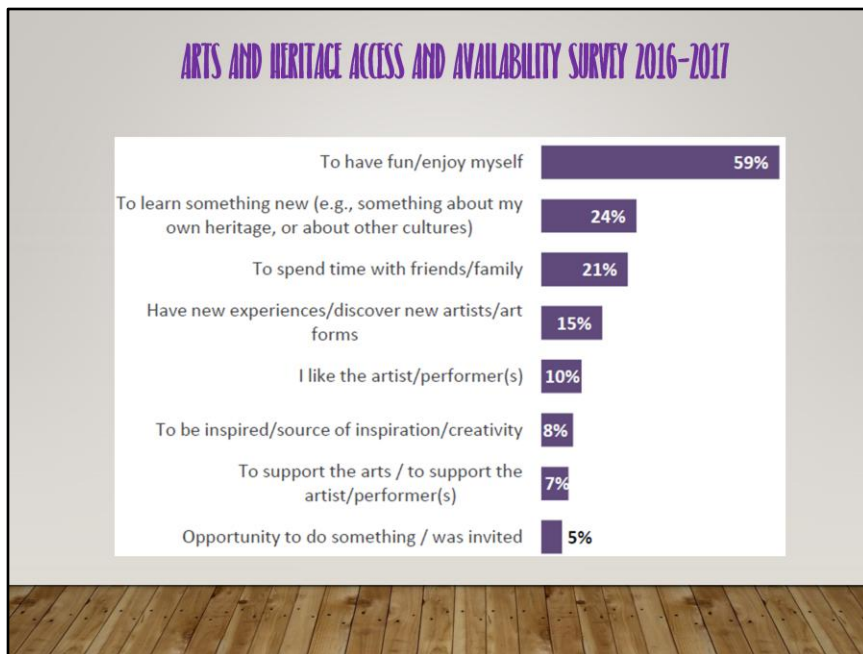
- As part of CAPACOA'S ongoing research, we were interested in various studies and reports that provide data on the social factors that drive people to participate in seeing live performing arts. We wanted to dig a bit further into this and collaborate with you all to gain your insights on some specific statistics.



SLIDE 2(a): EKOS RESEARCH ASSOCIATES / VALUE OF PRESENTING

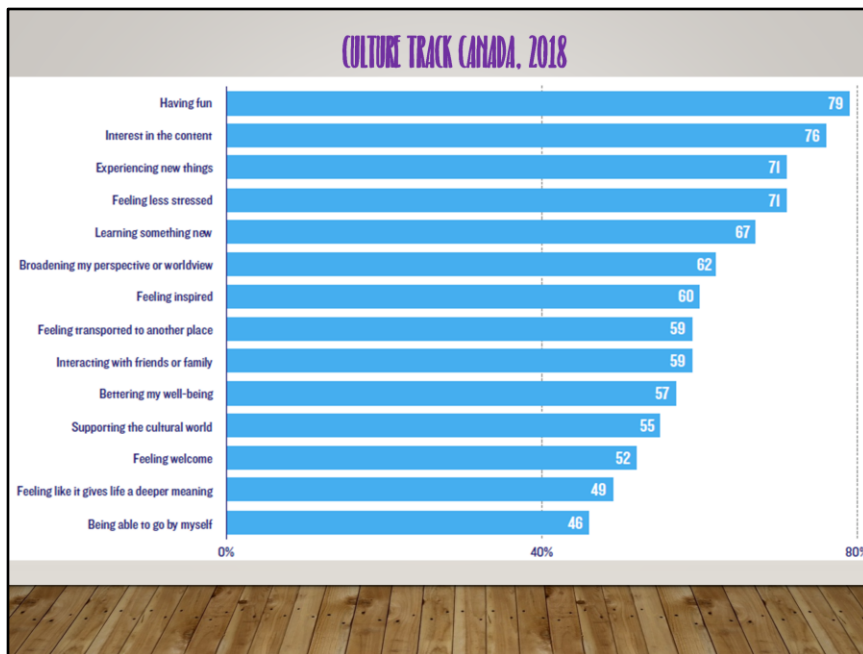
- [Survey of the General Public](#), commissioned by CAPACOA as part of The Value of Presenting, 2012
 - The Value of Presenting: A Study of Performing Arts Presentation in Canada (2011-2013) is the culmination of two years of intensive study and exploration designed to envision performing arts presenters’ current and future roles within the performing arts ecosystem, in their communities and in society at large. This study was commissioned by the Canadian Arts Presenting Association (CAPACOA), in partnership with the regional and other presenting networks and an advisory committee of sector representatives. The research and consultations process was designed and undertaken by Strategic Moves in collaboration with EKOS Research Associates for quantitative surveying.

* 44% of respondents say that “Opportunity to socialize with friends/meet people” is one of the main benefits of attending the performing arts (answers prompted) – meaning the answer was presented as one of many options to select from.



SLIDE 2(b): ENVIRONICS RESEARCH GROUP / AHAA SURVEY

- Environics Research Group, [Arts and Heritage Access and Availability Survey 2016-2017](#). aka “AHAA study”
 - Prepared for the Department of Canadian Heritage and Canada Council for the Arts
 - 21% of respondents report that “[spending] time with friends/family” is one their reasons for attending (answers unprompted). Meaning that no specific option was presented. Respondents identified this on their own.



SLIDE 2(c): LA PLACA COHEN AND NANOS RESEARCH / CULTURE TRACK

- LaPlaca Cohen and Nanos Research, [Culture Track Canada](#), 2018.
 - Culture Track: Canada is a study of the attitudes and behaviours of Canadian cultural consumers. It is the first Culture Track study fielded in Canada, building on the long-running research initiative of LaPlaca Cohen, a New York-based strategy, marketing, and design firm for the creative and cultural worlds. Culture Track: Canada sets an important baseline for both understanding the unique proclivities of Canada’s cultural audiences, and for future research efforts that can build upon insights first uncovered here. Via Business for the Arts in Canada
 - 59% of respondents declare that “interacting with friends/family” is a motivator for their cultural participation.

In Culture Track Canada, respondents were asked to describe the ideal cultural activity. The top three characteristic of the ideal activity were: social, lively, interactive

FOCUS GROUPS ON CANADIANS PARTICIPATION IN THE ARTS, 2018

Motivations and Barriers

- Factors that motivate attendance cover a wide range, while barriers are more limited to a few factors:

Several motivational factors were consistently noted in almost every session, including:

- Interest and curiosity/discovering new things
- An interest in specific artists
- Having time with friends and family / social interaction
- An interest in a specific culture
- A desire to have a good time/relax; and
- Elements of convenience such as the venue being reasonably close, transportation and parking.

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SLIDE 2(d): CORPORATE RESEARCH ASSOCIATES / FOCUS GROUPS , 2018

- Corporate Research Associates, [Focus groups on Canadians' participation in the arts](#), 2018
 - Prepared for the Department of Canadian Heritage
- Focus group participants also mention “Having time with friends and family / social interaction” as one of their main motivators for cultural participation.
 - “I like going in a group and it is rare that I will go alone. I like to share the moment with others.” (quote from a Youth member of the focus group)

FOCUS GROUPS....

A number of other obstacles were cited, including:

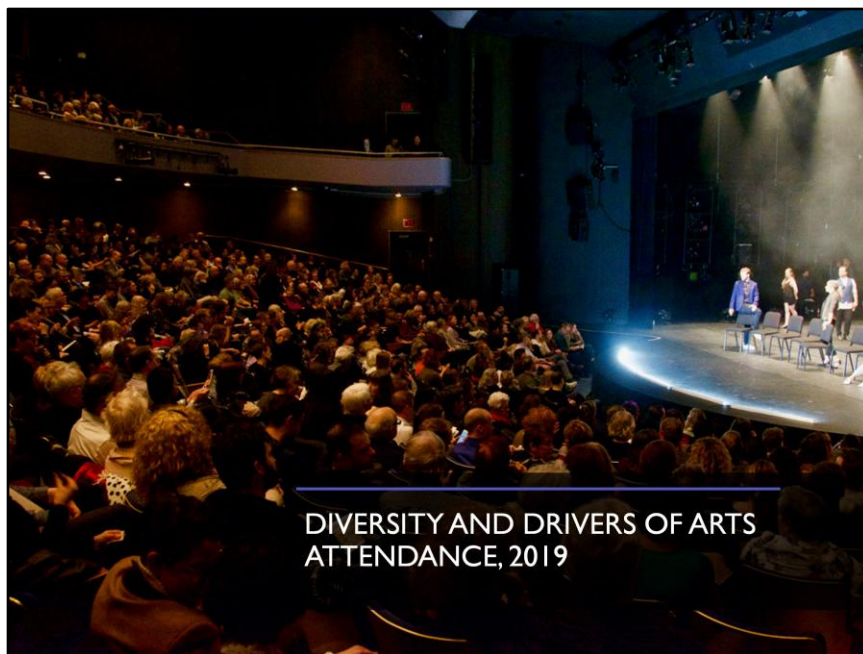
- Distance;
- Friends or family unable to attend;
- Weather or temperature – this applied both in the winter months as well as for outdoor events at other times of the year;
- A lack of awareness of particular events;
- Availability and accessibility to transportation and parking; and
- A lack of interest for a particular event.

"It has to be right after work so I can leave my car at work and just go, because parking is a problem." Ethnocultural Minority

"It is not as much fun if I can't find someone else to go with." Ethnocultural Minority

SLIDE 3: OBSTACLES

- Through the previous slides we've highlighted how social factors drive live performing arts attendance. In terms of identifying obstacles to attending live performance its interesting to note studies where respondents identified "not having someone to go with" as a barrier to attendance.
- This is identified in the Culture Track Canada report – 19% of respondents identified not having someone to go with as a barrier to attending live performance. It actually ranked 6th in a series of 14 obstacles.
 - *"It is not as much fun if I can't find someone else to go with."*
Ethnocultural Minority
- Cite Arts Council of England "Older People Poll"
 - ComRes interviewed 700 adults aged 65+ in England by telephone between 4th and 11th November 2015. Data were weighted to be representative of all adults aged 65+ in England.
 - Access, company and information are the most commonly cited ways that older people say would improve their attendance at and participation in arts and culture; 43% select venues that are easier to get to e.g. help with transport, or information about local buses or trains, whilst 39% say having someone to go with would make them take attend or take part in more arts and cultural events or activities.
- When looking at the story that these statistics tell us, they seem to confirm the hypothesis that live performances are fundamentally social



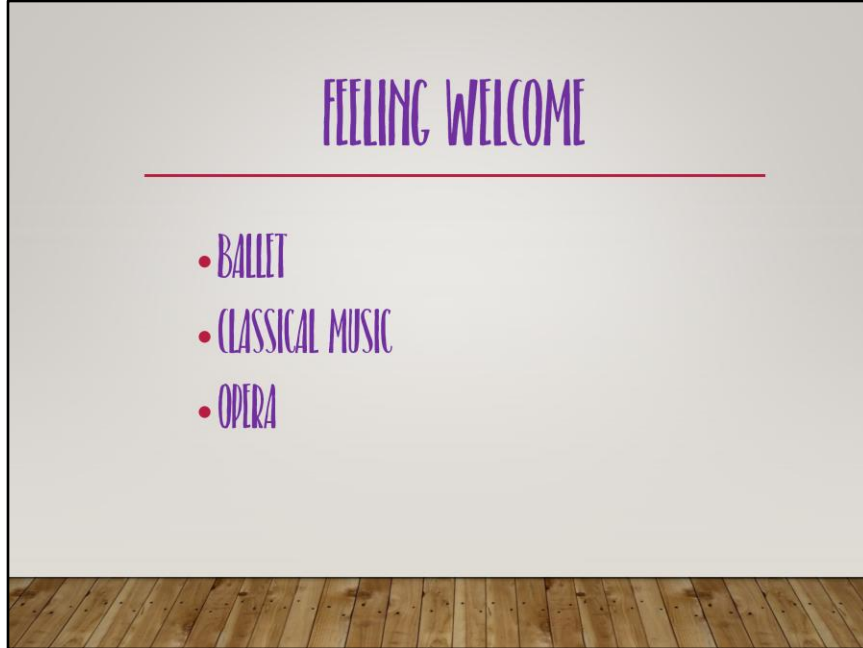
SLIDE 4: NANOS RESEARCH, [DIVERSITY AND DRIVERS OF ARTS PARTICIPATION](#), 2019 – INTRO SLIDE

- This Report is a supplementary analysis of Culture Track Canada data (La Placa Cohen / Nanos Research, 2018) completed by Nanos Research Group for Canada's Performing Arts Alliance (*Aboriginal Curatorial Collective, Canadian Dance Assembly, CAPACOA, Deaf Disability and Mad Arts Alliance of Canada, Fédération culturelle canadienne-française, Indigenous Performing Arts Alliance, Opera.ca, Orchestras Canada, Professional Association of Canadian Theatres*)
 - Using the [Culture Track Canada](#) dataset (from an online survey of 6,444 Canadians, conducted in December 2017 and January 2018), the report explores what's motivating arts attendance among different segments of the Canadian population, and how these motivators influence frequency of attendance at classical music, popular music, musicals, opera, ballet and theatre, as well as art museums and galleries.

THE MOST IMPORTANT DRIVERS OF FREQUENT PERFORMING ARTS ATTENDANCE INCLUDE...

- FEELING WELCOME
- FEELING LIKE IT GIVES LIFE DEEPER MEANING
- HAVING GROWN UP PARTICIPATING IN IT
- BEING ABLE TO GO BY MYSELF
- CONNECTING TO MY COMMUNITY

Nanos Research, [Diversity and Drivers of Arts Participation](#), 2019



“Feeling welcome” (53%) matters most to:

- Parents (60%)
- Allophones (59%)
- Immigrants (58%)
- Other gender identities (58%) (N=15, not statistically reliable)
- <\$50k (57%)
- Generation X (57%)
- Millennials (55%)
- Female (55%)



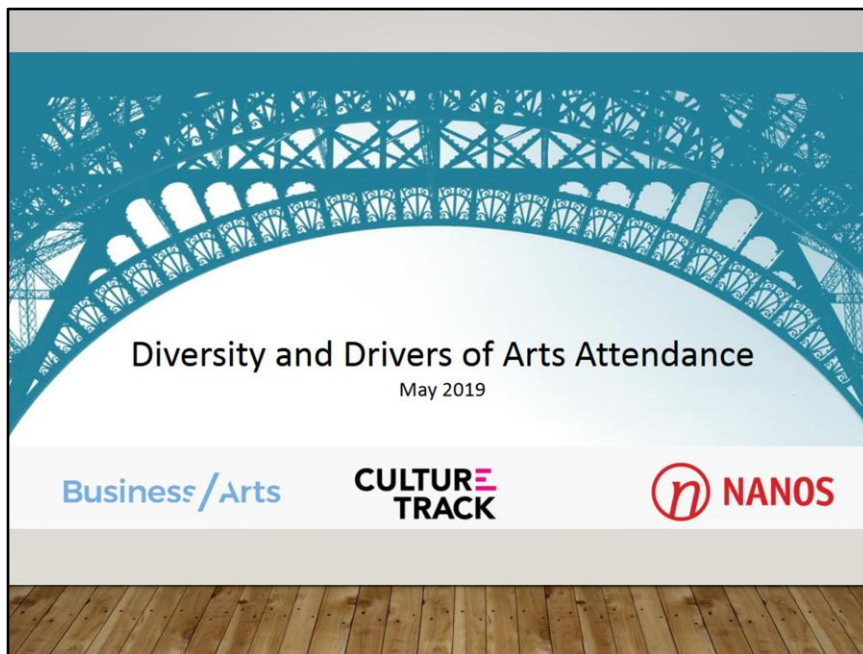
“Connecting to my community” (BOCA5_R2) (46%) matters most to:

- Parents (55.7%)
- Allophone (53.4%)
- Millenials (51.3%)



“Being able to go by myself” (45%) matters most to:

- Francophone (56.8%)
- Gender non-conforming/non-binary (51.5%)
- Other gender identities (50.5%)
- Millennials (50.6%)
- <\$50k (50.6%)



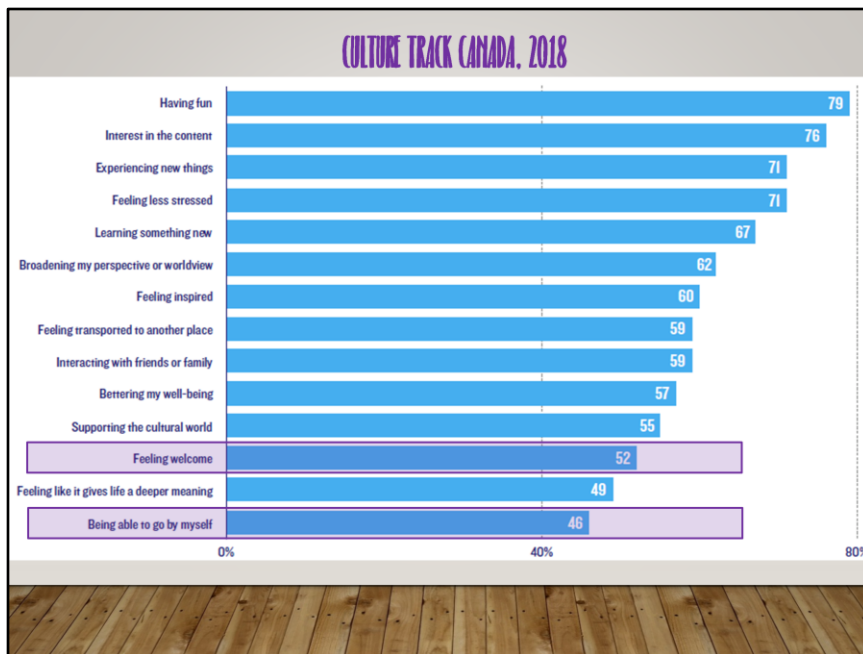
SLIDE 4(c): NANOS RESEARCH, DIVERSITY AND DRIVERS OF ARTS PARTICIPATION, 2019 REFLECTIONS

- Interestingly in the “Diversity and Drivers of Arts Participation” analysis, “interacting with friends and/or family” isn’t strongly correlated with frequent attendance.

It is a significant motivator for opera (most segments), ballet (only among Francophones), and theatre (only among Anglophones).

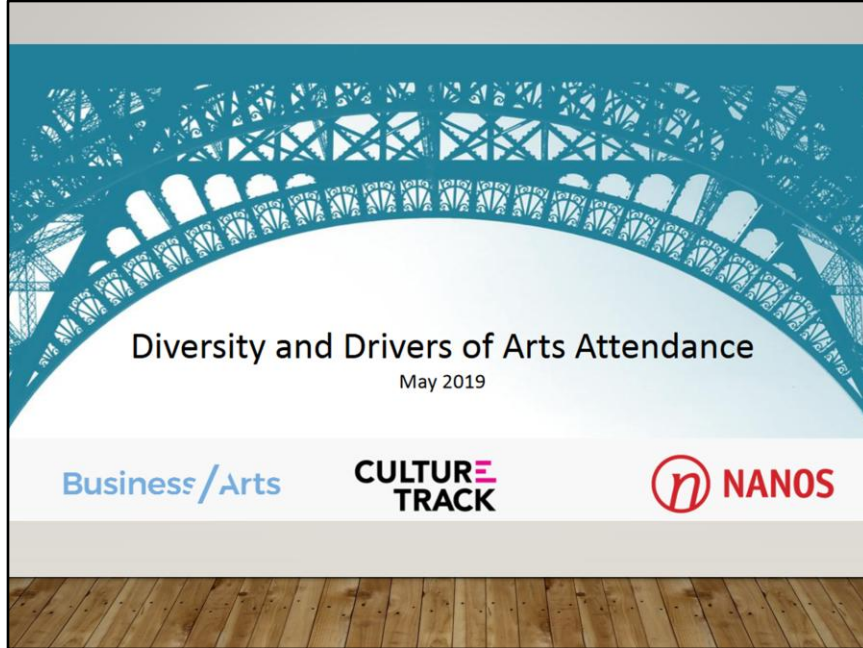
“Interacting with friends and/or family” (58%) matters most to:

- Parents (68%)
- Female (62%)
- Millennials and Gen X are at 61%, but this isn’t a huge difference compared to the average.
- The analysis also reveals that “Feeling welcome” and “Feeling like it gives life a deeper meaning” are among the most important drivers for frequent performing arts attendees. Interestingly, in the full Culture Track Canada report, these drivers fare well below most other drivers in the list of fourteen motivators.....



SLIDE 4(d): REPEAT CULTURE TRACK SLIDE, 2018

-This is because the full report presented motivators reported by all respondents, regardless of how frequently they attended. Thus, while having fun / being social is an almost universal reason to attend, it does not explain why someone attends more or less. And whereas “Feeling welcome” may be an irrelevant motivator for many irregular attendees, it matters a great deal to those who attend most often.



SLIDE 4(e): REPEAT NANOS RESEARCH, DIVERSITY AND DRIVERS OF ARTS PARTICIPATION, 2019 REFLECTIONS + POLL QUESTIONS

Speaking of the motivators identified in the analysis we have some quick poll to gather your thoughts...

- **POLL:** “Connecting to my community” is a motivator for 46% of respondents. Which of these demographic segments would you say is most likely to feel motivated by the possibility of feeling welcome at a live performance?
 - Millennials
 - Immigrants
 - Parents
 - Allophones
- **ANSWERS:** Parents are the most strongly motivated at (55.7%).
motivation:
- Parents (55.7%)
- Allophones (53.4%)
- Millennials (51.3%)

Interestingly Francophones are much less likely to be motivated by a desire to connect with their community

QUESTION

HOW CAN WE ENSURE THAT IMMIGRANTS FEEL WELCOME
AND THAT IMMIGRANTS CONTINUE TO ATTEND REGULARLY?



SLIDE 5: CANADIAN POPULATION TRENDS – INTRO SLIDE

- In addition to taking all this new research in about live performing art attendance and participation we also wanted to provide some general statistics on the Canadian population the live performing arts sector operates within....

CANADIANS LIVING ALONE



More and more Canadians are living alone. In 2016, for the first time, one-person households became the most common type of household in Canada, surpassing couples with children. *

* Insights on Canadian Society, Living Alone in Canada. Stats Canada, 2016

SLIDE 5(a): LIVING ALONE

- Insights on Canadian Society, Living Alone in Canada. Stats Canada, 2016
- One-person households accounted for 28% of all households in 2016, representing 4 million Canadians.
- Further, most people who live alone previously had a partner and have at least one child.
 - Almost three-quarters (72%) of people living alone aged 20 and older had previously lived as part of a married or common-law couple,
 - and over half (55%) had at least one child.
- Among solo dwellers who had a dependent-aged child from a previous union, 59% indicated that their child lived with them for some period of time in the previous year.

AN AGING POPULATION

Seniors in Canada are a rapidly growing segment of the population and are living longer and healthier lives than previous generations.



*Government of Canadian, Action for Seniors
Report 2014*

SLIDE 5(b): AN AGING POPULATION

- Government of Canadian, Action for Seniors Report 2014
- Seniors in Canada are a rapidly growing segment of the population and are living longer and healthier lives than previous generations.
- In 2014, over 6 million Canadians were aged 65 or older, representing 15.6 percent of Canada's population. By 2030—in less than two decades—seniors will number over 9.5 million and make up 23 percent of Canadians.

POLL

COULD IT BE THAT “GOING ALONE” IS JUST AN EARLY ATTENDANCE TREND, AND THAT MORE AND MORE CANADIANS WILL ATTEND ALONE IN COMING YEARS?

QUESTION

HOW CAN OUR SECTOR RESPOND AND ADAPT TO THIS TREND?



THANK-YOU!



CANADIAN ARTS PRESENTING ASSOCIATION
ASSOCIATION CANADIENNE DES ORGANISMES ARTISTIQUES

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