



ARTS Tracking Study

—

Special focus on Gen-Z

November 5th, 2023



- Past and future attendance
- Ticket purchasing and attendance
- Volunteering
- Appealing to Gen-Z

Overview

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

- **May wave:** Online random survey of 1,080 Canadians between April 30th and May 3rd, 2023, 18 years of age or older as part of an omnibus survey.
- **August wave:** Online random survey of 1,081 Canadians, between July 30th and August 2nd, 2023, 18 years of age or older as part of an omnibus survey.

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

The research was commissioned by Business and the Arts and the National Arts Centre and was conducted by Nanos Research.

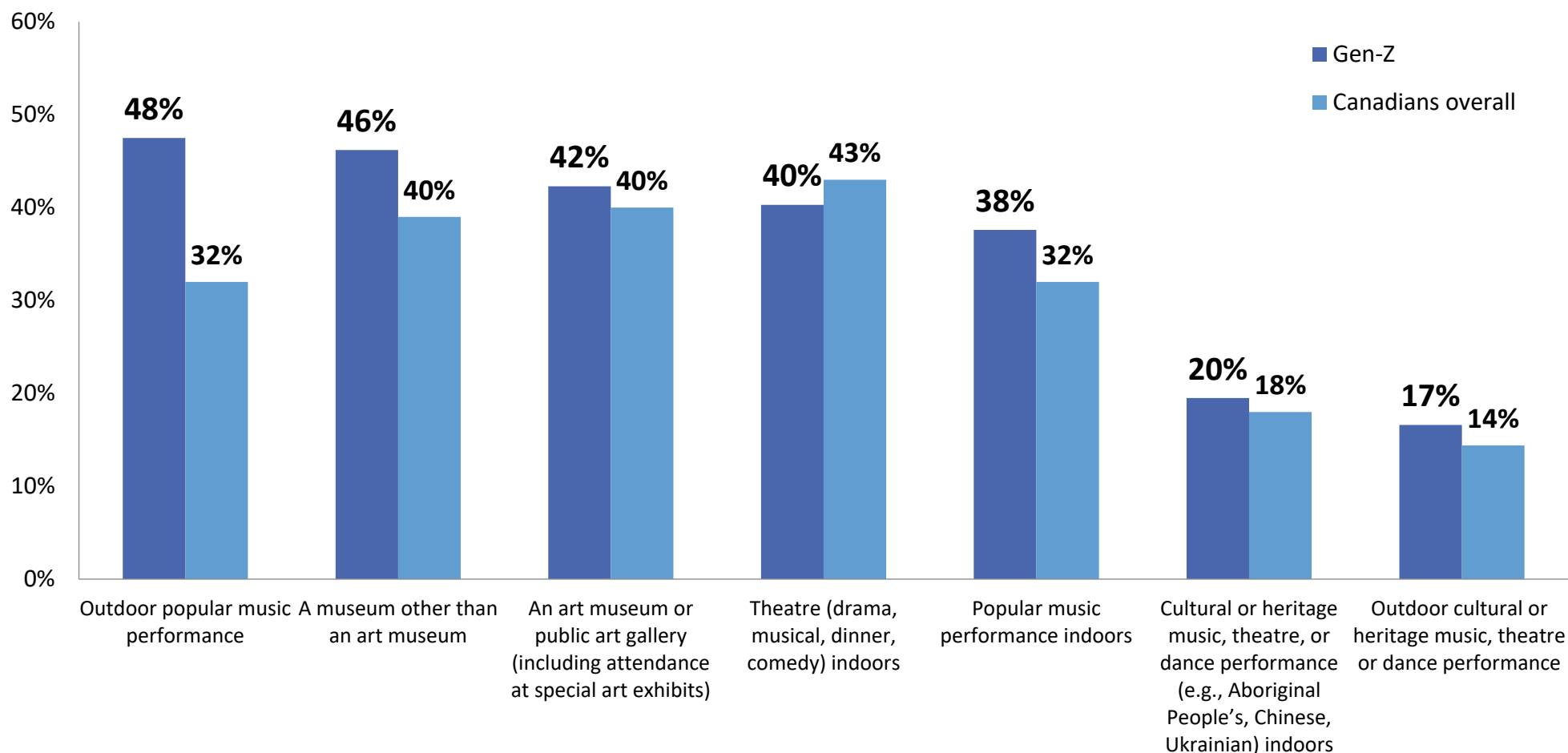
***The data presented today will focus on the results for the 18 to 25 age group for the research conducted in May and August 2023.**



Past and future attendance

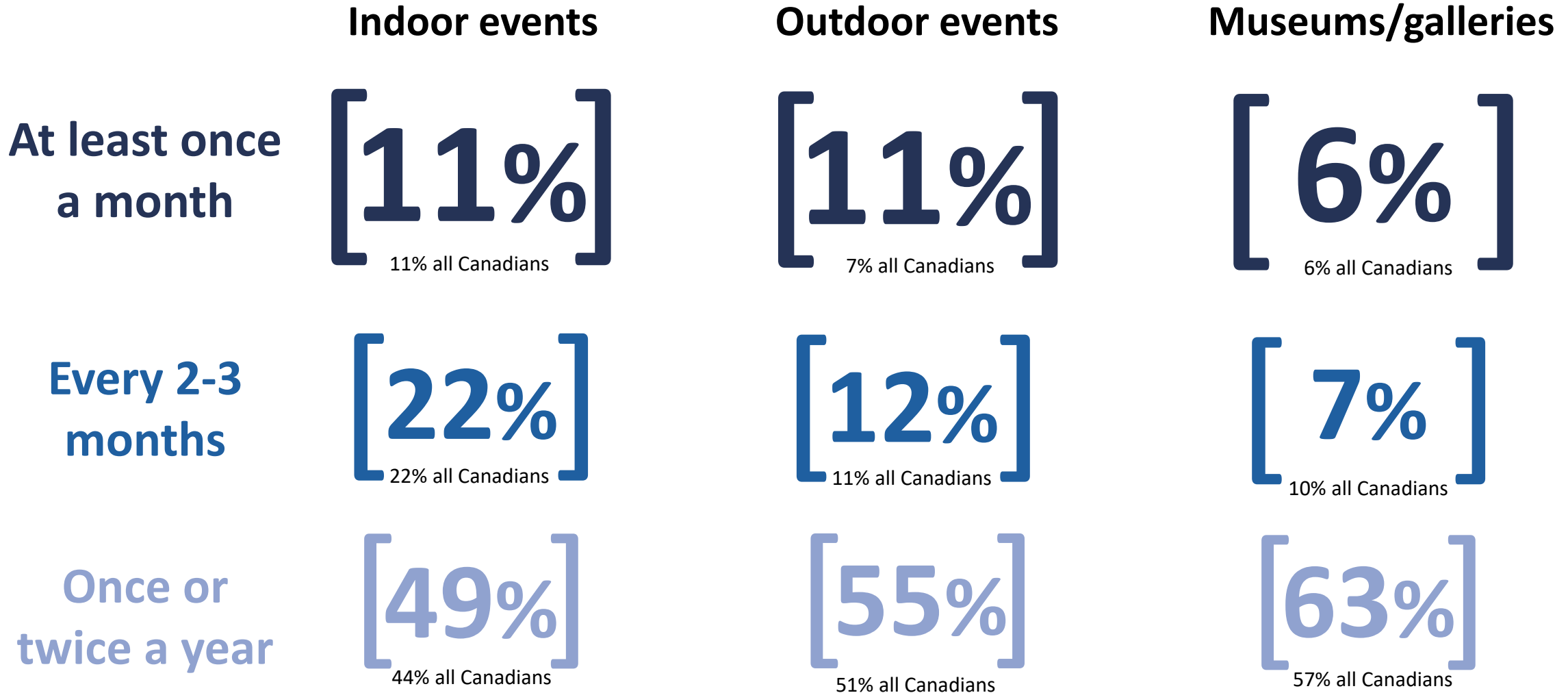
Top events attended since pandemic – Gen-Z

Q – Did you attend any of the following INDOOR/OUTDOOR cultural gatherings in the past three years?
[RANDOMIZE](select all that apply)



Online random survey of 1,081 Canadians (84 Gen-Z respondents), between July 30th and August 2nd, 2023 as part of an omnibus survey.

Expected frequency of attendance for Gen-Z



Online random survey of 78 Gen-Z Canadians, between July 30th and August 2nd, 2023 as part of an omnibus survey.

Ticket purchasing and attendance

Support for arts and culture in 2023

Under one in five Gen-Z say they are likely or somewhat likely to purchase subscriptions or memberships from the favourite arts or cultural organizations (22% for Canadians overall).

Subscriptions or memberships

14% Likely/somewhat likely

84% Unlikely/somewhat unlikely

3% Unsure

Over half of Gen-Z say they are likely or somewhat likely to make single ticket purchases to their favourite arts or culture organization. This is lower than Canadians overall (69%).

Single-ticket purchases

58%

Likely/
somewhat likely

37%

Unlikely/
somewhat unlikely

5%

Unsure



Gen-Z

are most likely to prefer sure-thing entertainment for their arts and culture experiences followed by learning experiences.

Gen-Z are more likely than Canadians to prefer learning experiences.

Content personas

30%

Sure-thing entertainment

“I want arts and culture experiences where I’m pretty sure I will be entertained” (38% for Canadians)

27%

Learning experiences

“I want arts and culture experiences where I learn something” (20% for Canadians)

22%

Limited exposure

“Arts and culture experiences are not a big priority for me” (20% of Canadians)

18%

Vociferous culture

“I want different and as many kinds of arts and culture experiences as possible” (19% of Canadians)

3%

Pop-culture

“New and current arts and culture experiences are more important than traditional ones from the past” (Two per cent of Canadians)

Ticket purchasing personas

Familiar friends



52%

I usually purchase many tickets for shows that interest me throughout the year

Social attendees



28%

I will usually only purchase tickets for shows if someone else invites me to go with them (18% for all Canadians)

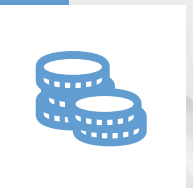
Special scene



9%

I usually purchase tickets for shows that are big blockbusters only

Discount hunters



11%

I will usually only purchase tickets for shows if I can get a discount or a rebate

Online random survey of 66 Gen-Z, April 30th and May 3rd, 2023 as part of an omnibus survey.

Volunteering



Frequency of volunteering

Time spent volunteering for arts and cultural organizations in past year

	18-25	35-54	55 plus
At least once a month	5%	5%	4%
A few times a year	10%	5%	5%
Once a year or less	4%	7%	7%
Never	77%	80%	81%

Comparison of time spent volunteering in past year to pre-pandemic period

	18-25	35-54	55 plus
Less/somewhat less	13%	19%	25%
More/somewhat more	7%	4%	2%
About the same	69%	65%	55%
Unsure	11%	11%	15%
Net impact	-6	-15	-23



The pandemic

had less of a negative impact on volunteering among Gen-Z than on older generations with over two thirds who report volunteering about the same in the past year compared to before the pandemic.

Volunteering for the Arts and Culture

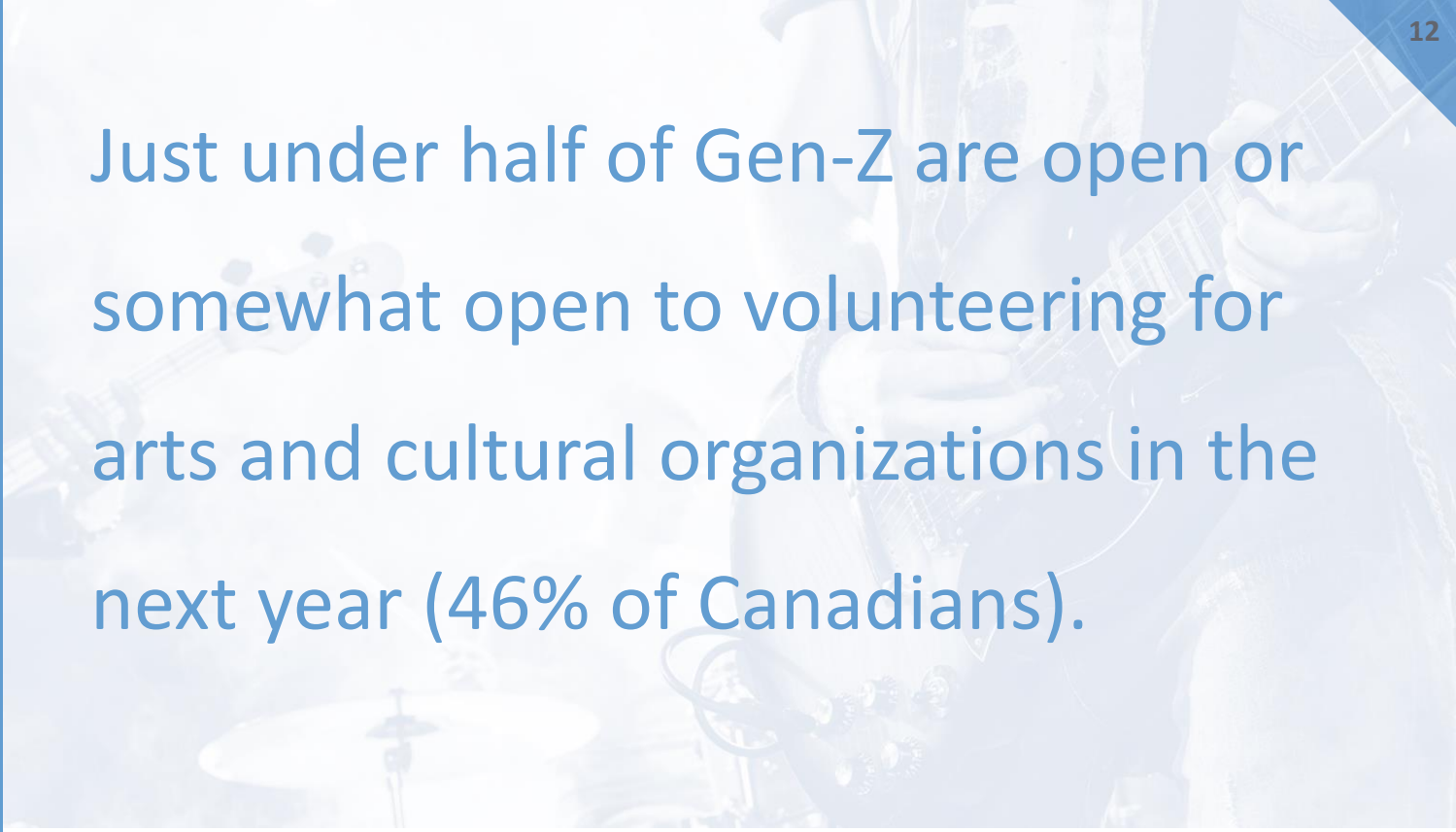
Preferred approach to volunteering

35% Volunteering for special events or projects (33% Canadians)

32% Not interested (38% Canadians)

12% A reoccurring engagement on a regular basis (11% Canadians)

10% Volunteering on the board of an organization (11% Canadians)



Just under half of Gen-Z are open or somewhat open to volunteering for arts and cultural organizations in the next year (46% of Canadians).

Openness to volunteer in next 12 months

49%

Open/somewhat open

37%

Not open/somewhat not open

14%

Unsure

Online random survey of 78 Gen-Z, between July 30th and August 2nd, 2023 as part of an omnibus survey.

Top motivators for Gen-Z culture-goers to volunteer for arts and cultural organizations

17%

(9% of all Canadians)

Having time/schedule flexibility

9%

(12% of all Canadians)

It aligns with my interests

13%

(10% of all Canadians)

My values align with the organization/event

7%

(5% of all Canadians)

The community/other volunteers

Q – What would motivate you the most to volunteer for an arts or culture organization? [OPEN]

Online random survey of 59 Gen-Z, between July 30th and August 2nd, 2023 as part of an omnibus survey.

Appealing to Gen-Z



Representation in the arts

Just over one third of Gen-Z say arts and cultural institutions in Canada do a very good or good job creating welcoming experiences, while under one third say they do an average job. This is on-par with other age groups.

39%

Very good/
good

31%

Average

10%

Poor/
Very poor

20%

Unsure



Q - Do you think arts and cultural institutions in Canada are doing a very good, good, average, poor or very poor job at creating experiences that are welcoming to a diversity of Canadians?

Online random survey of 84 Gen-Z, April 30th and May 3rd, 2023 as part of an omnibus survey.

Top things Gen-Z wants to see the arts and culture sector do to be more appealing to them

16%

(22% of all Canadians)

Affordability/
free events

9%

(3% of all Canadians)

Remove politics
from arts and
culture, less "woke"

10%

(9% of all Canadians)

Less travel required/
having more events
closer to them

8%

(2% of all Canadians)

Inclusiveness

Conclusions – Gen-Z

- Most Gen-Z have returned to the arts since the pandemic, prioritizing outdoor concerts.
- Gen-Z are about as likely to prefer sure-thing entertainment than an experience where they learn something.
- They are more likely than other age groups to say they only go to events if someone else goes with them.
- The pandemic had less of a negative impact on Gen-Z volunteers than older Canadians and about half are open to volunteering in the next year.





Questions?