The Strategic Counsel

theatre dance opera toronto alliance for the performing arts

TAPA Audience Survey: Attendance and Engagement with Arts and Cultural Activities in Toronto

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Introduction and Objectives

Introduction

- This report is based on a total of 3531 responses to surveys distributed via email by forty-seven TAPA member companies to their audience members (hereafter referred to as "TAPA audiences").
- Surveying took place between April 9th and August 13th, 2013.
- Audience members receiving the email were invited to participate in the survey by clicking on a link that took them to the site hosting the survey.
- Each member company was assigned a unique link so that responses could be tracked by company. .
- In all, 12 companies provided more than 50 responses from their audiences and in fact this represents 88% of all responses.
- Attendees of performances by TAPA member companies do not tend to limit themselves to performances by just one company. Audiences members are aware of and attended performances by companies other than the one to whose invitation they responded.
- This indicates that responses reflect the diverse range of performing arts experiences to which audiences are exposed in the Toronto area. .

Objectives

- This survey was designed to better understand the audience for TAPA member companies. This includes:
  - Demographic profile;
  - Frequency of attending performances and types of performance;
  - Level of engagement with arts and culture;
  - Importance of arts and culture compared with other activities in making Toronto an attractive place to live;
  - Identification of key barriers to attendance; and
  - Sources of information about performances.

Five Key Findings

Five Key Findings

1. A passion for the arts is the most important factor driving attendance. Learning more about what drives passion and how to nurture it is a key for building audiences.

2. Concerns about cost is a key barrier to attendance. Continued messaging about the affordability of the arts is vital in order to reach those with concerns over spending.

3. Memberships and subscriptions hold limited interest for younger audiences despite the love that many in this group have for the performing arts. Connecting with these audiences in new and dynamic ways is a high priority.

4. The audience is divided into two broad groups by income and, to a lesser extent, age. Those with high household incomes make up a large proportion of TAPA audiences and this group tend to be older and without the time and financial constraints of younger audiences. This older audience is largely focused on the tried and familiar. The younger, less affluent audience, on the other hand, is seeking something new. Continuing to understand the audience and what kind of experience they are seeking and what they can afford is important in order to move forward.

5. Understanding the appropriate communications channels to use and when to use them is one key to building audiences. The age of the audience is key to determining the best suited channels. But regardless of age, a company website is the single most important channel for sustaining and reinforcing awareness, once the public is aware of a production. Word of mouth, email and email blasts are all important to create initial awareness. Younger audiences are highly focused on digital channels (including social media), and older audiences on print channels.

Demographics of Respondents

Key Demographic Findings

- Audiences of TAPA member companies are found in all age groups. While they are, on average, older than the Toronto adult public overall (45 years to 53 years), one-in-five is under 35 years of age.

- The audience is also largely without children 18 years of age or under (only 13% reported children of this age, compared with 28% among Toronto households overall). This results in three broad demographic groups:
  - Under 45 with no children (26%);
  - 45 – 64 with no children 18 or under 38%); and
  - Seniors (22%).

- They are also found across all household income groups. While the audiences average annual household income is well above the average for the City ($53,00 to $88,000), four-in-ten report household incomes of less than $60,000. The reason for the high average income is that 42% of audiences report an annual household income of over $100,000. The audience is therefore split between those from high income and those from average and lower income households.

- In keeping with many previous studies, audiences are invariably highly educated (79% have a least an undergraduate degree compared with 29% among adult Torontonians) and are more female than male (66% to 34%).

- Among the 57% of audience members who report that they have a job, many work in the arts, cultural or heritage sector (24%). Almost all others are engaged in some professional or managerial capacity outside of the arts and culture sector.

TAPA audiences are well educated, affluent and of diverse ages.

- TAPA audiences vary significantly, but far less than the Toronto adult population overall. Generally, they are older, more affluent, better educated, with fewer young children and predominantly female. The average age is 53 years and the average household income is $88,000.

- Typical of most surveys of arts audiences, they are highly educated with 79% having a university undergraduate degree, and 46% a post-graduate or professional degree. The audience is also heavily skewed toward women, with two thirds being female.

- TAPA audiences are also largely without children under 18 years of age (86%). Most are in some form of live-in relationship (61%), although a substantial minority report being single (26%).

- In terms of life stage, audiences are in one of three stages:
  - Under 45 years of age with no children (26%);
  - Middle-aged (45 – 64 years) with no children under 18 (38%); and
  - Seniors with no children under 18 (22%).

- Given the large number of seniors, it not surprising that a quarter of TAPA audiences are retired. However, 43% report working full-time, 11% part time, and a further 20% reporting that they are self-employed.

There are significant demographic differences in audiences based on the type of performing art they prefer.

- Most respondents identify as Canadian (80%) or of European origin. Few (9%) identify as part of a visible minority culture and given that almost half (49%) of the Toronto population are now members of a visible minority, this lack of representation in the audience presents significant potential opportunities for TAPA member companies.

- Most work in some type of professional capacity (34%) or in an area of artistic or literary endeavor (24%), and a further 21% in senior (9%) or middle (12%) management.

- In terms of employment, TAPA audiences work in a number of specific industry sectors. The largest single group of respondents are engaged in the arts, cultural or heritage sector (25%). This is followed by education (16%), and health care (9%). Representatives from these three sectors make up half of the audience responding to the survey.

Demographics of TAPA Audiences and Selected Comparisons with Toronto Results from the 2011 Census

Age	Total	2011 Census
n=	3531	-
	%	%
18-24	4	12
25-34	15	19
35-44	14	18
45-54	20	19
55-64	26	14
65+	22	18
MEDIAN AGE (years)	53	45

Gender	Total	2011 Census
n=	3531	-
	%	%
Male	34	47
Female	66	53

Marital Status	Total
n=	3531
	%
Single	26
Married/Partner	61
Separated/Divorced	9
Widowed	4

Highest Level of Education	Total	2011 Census
n=	3531	-
	%	%
High school	3	45
Some college	3	26
Completed college	7	
Some university	7	
Undergraduate degree	33	79
Post graduate/Professional degree	46	

HH Income	Total	2011 Census
n=	2696	-
	%	%
<$40,000	17	-
$40,000-<$60,000	13	-
$60,000-<$80,000	14	-
$80,000-<$100,000	14	-
$100,000-<$150,000	20	-
$150,000-<$200,000	12	-
$200,000 or more	12	-
MEDIAN INCOME ($1,000)	88	53

Children under 18	Total	*
n=	3531	-
	%	%
Yes	13	28
No	86	72

*From 2012 Toronto-wide online survey

Q. Demographics
Base: Total sample

Demographics of TAPA Audiences and Selected Comparisons with Toronto Results from the 2011 Census

Life Stage	Total
n=	3531
	%
Under 45/no kids	26
Under 45/with kids	6
Middle-aged/no kids <18	38
45+ with kids ≤18	7
65+ with no kids ≤18	22

Employment	Total	2011 Census
n=	3531	-
	%	%
Full-time	43	60
Part-time	11	
Retired	26	-
Homemaker	3	-
Self-employed	20	-
Student Full-time	4	-
Unemployed	3	8
Other	3	-

Sector	Total
n=	2423
	%
Law	4
Health care	9
Education	16
Marketing/Advertising	4
Technology/Software	5
Arts/Culture/Heritage	25
Communications	2
Gov't/Public Administration	6
Entertainment	5
Media/Social media	2
Hospitality/Tourism	2
Retail	2
Financial services	5
Services	2
Not-for-profit/NGO	2

Type of Work Undertaken	Total
n=	2426
	%
Professional	34
Artistic/Literary	24
Middle management	12
Senior management	9
Service/clerical	7
Business owner	4
Technician	3
Sales	3
Skilled service	1
Other	3

Q. Demographics
Base: Total sample

Frequency of Attendance

Key Findings

- There is generally a high level of attendance to live performances with half (52%) reporting attending 10 or more performances in 2012. When the 11 specific arts and cultural genres and activities are examined, plays and movies are easily the most frequently attended genres, followed by visits to a public art gallery or museum.

- In order to deepen the analysis, two scales dealing with frequency of attendance were constructed: one representing the four TAPA related genres, and another that includes all 11 genres and activities.

- Overall frequency of attendance/activities varies little by age or household income. There are, however, differences by specific genres. For example, those in the 55 and older report attending more plays, as well as operas and classical music, than other age groups. Furthermore, those 65 and over are especially likely to attend opera and classical music. Dance is attended most frequently by those under 35 years of age.

Frequency of Attendance

- When asked how many live performances they attended in 2012, half of TAPA audiences reported that they had attended at least 10 live performances. The percentage reporting this frequency of engagement varied little across age groups. Those aged 35 to 54 years of age being slightly less active, and this, as noted later, is most likely due to child raising activities. Household income is not linked to the level of attendance in any meaningful way.

- There is, however, a great deal of variation across arts and cultural activities. Movies and non-musical theatre (plays) are easily the most frequently attended activities with four-in-ten reporting six or more attended in the last year. Other arts and cultural activities are far less frequently attended, with visits to public art galleries and museums, and opera and classical/chamber music performances being the next most frequent activity. Only 14%, in each case, report six or more visits/attendances in the last year.

- Overall, visiting attendance at public art galleries and museums is far stronger than opera and classical/chamber music performances; only 11% of audiences report no visits to public art galleries and museums in the last year, compared with 39% for the opera/music option.

- Other TAPA member company performing arts are, like opera and classical/chamber music, not attended with any great frequency. This may be a function of the fact that theatre companies tend to make up the largest proportion of TAPA members. In fact, the great majority of responses came from the email invitations from theatre companies. For ballet and dance, 9% report attending six or more performances and for musicals the number is 9%.

Frequency of Attendance

- When only those expressing a preference for a particular genre are considered, then those reporting having attended six or more performances for each genre are as follows:
  - Plays (57%);
  - Musicals (28%);
  - Dance (44%);
  - Music (20%) and
  - Opera (67%).
- The low incidence of musicals is likely a function of lower levels of availability than other genres. In the case of music, this definition covers a wide range of musical genres. In fact, those preferring music over all other performing arts were also more likely to report higher attendance across all music genres explored.
- In the case of music, this is a function of the definition used. This general way of defining music includes: pop, rock, rap, blues, and jazz as well as the more traditional genres of classical and chamber music, recitals, and opera. In fact, those selecting music as their preferred genre were invariably well above the average for attendance at each type of music they attended. In the case of those preferring music (above) the 20% reporting six or more performances attended, is for opera/classical and chamber music.

Frequency of Attendance

- When the various arts and cultural genres are explored by age, only five show a relationship between age and frequency of attendance. Plays and opera/classical and chamber music show increasing frequency of attendance with age starting at age 55. On the other hand, pop and rock/rap/blues show declining frequency of attendance again starting at age 55. For dance, the most frequent attendees are under 35 years of age.

- For all other activities there is little consistent variation across age groups. This suggests engagement for the other arts and cultural genres is not age dependent in any significant way.

- Household income could also be a factor explaining frequency of attendance, but for the four TAPA member genres, there is no major relationship between attendance and household income for each genre. The exceptions are for opera/classical music, in which case there is a somewhat greater frequency of attendance with higher income, as well as dance, where the lowest income group attends most frequently.

- In general, there is very limited variation in frequency of attendance across each age group when income is added to the mix. In other words higher income earners in each age group are no more or less likely to attend performances more or less frequently. The exceptions are:
  - Among the youngest age group (<35 years), it is those with household incomes of less than $60,000 a year who are most likely to report attending six, or more performances of plays, or two or more dance performances in the last year, compared with higher income earning households in this age group.
  - Among those 55 years and above, greater proportions of those in the highest income households report attending six or more opera/classical and chamber music performances.

Frequency of Attendance

- In order to explore attendance patterns more fully, two scales (indices) have been created; one combines the attendance for the four TAPA member genres (plays, musicals, dance, and opera/classical and chamber music), and the second represents the total attendance/visits across all 11 activities. (See Appendix A for more details on the methodology.)

- In both cases, it is interesting to note that the frequency of attending/visiting is fairly constant across all household income and age groups.

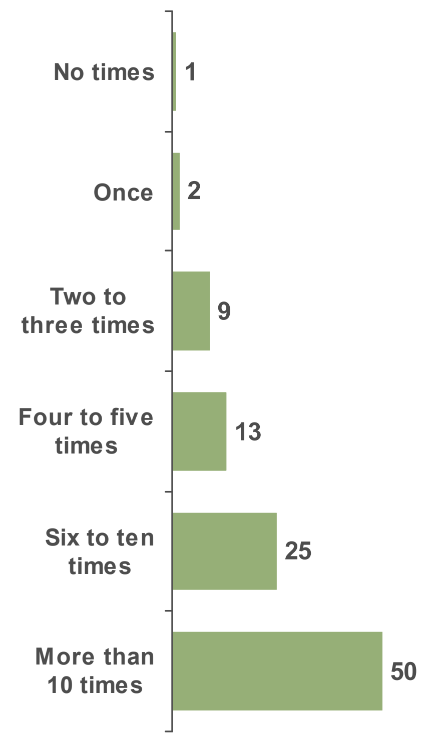
- What is also clear from the two scales is that TAPA audiences attend/visit a wide range of arts and cultural activities in addition to those of TAPA companies.

- There appears to be no relationship between the frequency of age and overall attendance at arts and cultural activities.

- Among TAPA related activities, however, younger and older attendees are slightly more likely to attend more frequently than those aged 35 to 54 years of age. This issue is further explored later in this report.

TAPA audiences show high attendance across all age groups.

Total
n=3531



	Age				
	<35	35-44	45-54	55-64	65+
n=	653	488	687	909	793
	%	%	%	%	%
No times	2	1	1	-	1
Once	3	2	2	1	1
Two to three times	13	14	10	6	5
Four to five times	11	15	16	12	11
Six to ten times	20	24	26	30	25
More than ten times	52	44	46	51	57

Q.3 How often in the last year (2012) did you attend a live performance of some kind?
Base: Total sample

Audiences were asked to identify the number of times they undertook 11 arts and cultural activities, including four specifically related to TAPA member companies. Movies and plays are the most frequently attended activities.

Number of Times Attended Activities

	None	1	2/3	4/5	6+
	%	%	%	%	%
Movie	4	7	24	21	44
Non-musical theatre/plays	5	11	26	19	39
Public art gallery or museum	11	22	35	18	14
Opera/Classical music/chamber music	39	21	18	8	14
Musicals	30	24	25	12	9
Dance/Ballet performance	43	24	18	7	8
Commercial art gallery	36	25	25	8	7
Craft/artist studio	39	23	26	6	5
Pop music performance in a club or hall	54	19	18	4	4
Rock/Rap/Blues performance	57	18	16	5	4
Jazz/World music	56	20	17	4	3

Q.4 How often in the last year did you attend the following types of activities?
Base: Total sample

A number of activities are attended by all age groups with at least some frequency, but attendance at opera and or classical music increases with age.

Age and attendance two or more times at Specific Arts/Cultural Activities

	Total	< 35	35 - 44	45 - 54	55- 64	65+
	%	%	%	%	%	%
Non-musical theatre/plays	84	76	80	84	89	88
Movie	89	92	88	87	88	88
Public art gallery or museum	67	61	67	62	69	73
Opera/Classical music/chamber music	41	29	30	33	43	60
Musicals	46	40	37	46	48	44
Commercial art gallery	40	36	35	43	45	40
Craft/artist studio	38	32	36	42	40	37
Dance/Ballet performance	33	41	34	30	31	32
Jazz/World music	24	22	23	26	26	24
Pop music performance in a club or hall	27	38	34	32	23	14
Rock/Rap/Blues performance	25	34	33	32	21	10

Q.4 How often in the last year did you attend the following types of activities?
Base: Total sample

Attendance at plays is slightly lower among younger audiences (under 55 years), but is significantly lower in the case of opera and classical music.

Age and attendance four or more times at Specific Arts/Cultural Activities (TAPA)

	Total	< 35	35 - 44	45 - 54	55- 64	65+
	%	%	%	%	%	%
Non-musical theatre/plays	58	52	49	54	62	64
Opera/Classical music/chamber music	22	11	14	16	21	43
Musicals	21	18	14	20	23	25
Dance/Ballet performance	15	19	15	12	14	16

Q.4 How often in the last year did you attend the following types of activities?
Base: Total sample

There is no significant relationship between household income and frequency of attendance at TAPA member performances, except in the case of opera.

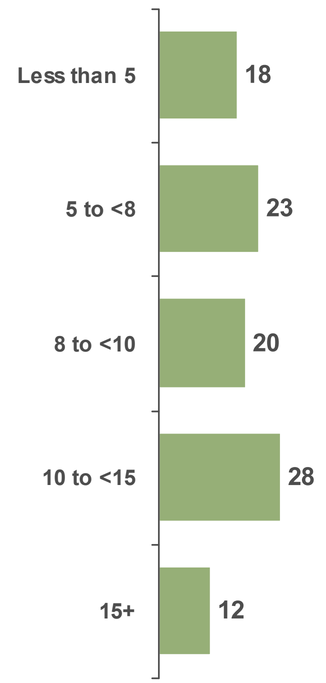
Number of Times Attended Four or More TAPA-Related Performances by HH Income

	Total*	Income ($1,000)				
		$<40	$40-79	$80-124	125-199	200+
	%	%	%	%	%	%
Non-musical theatre/plays	58	66	56	55	56	66
Opera/Classical music/chamber music	22	15	21	23	25	29
Musicals	21	18	20	17	20	20
Dance/Ballet performance	15	23	15	14	15	17

* Percentages add to more than 100% due to multiple mentions

Q.4 How often in the last year did you attend the following types of activities?
Base: Total sample

Total number of plays, musicals, dance, classical music and opera performances attended last year and household income.



	HH Income				
	<$40K	$40-$80K	$80-$125K	$125-$200K	$200K+
n=	455	717	709	502	313
	%	%	%	%	%
Less than 5	15	18	21	19	13
5 to <8	18	25	23	24	20
8 to <10	24	18	17	19	21
10 to <15	30	28	27	26	27
15+	12	12	12	13	19

Q. Varies
Base: Total sample

Seniors are the most frequent attendees of TAPA activities, and those aged 35-54 are the least frequent.

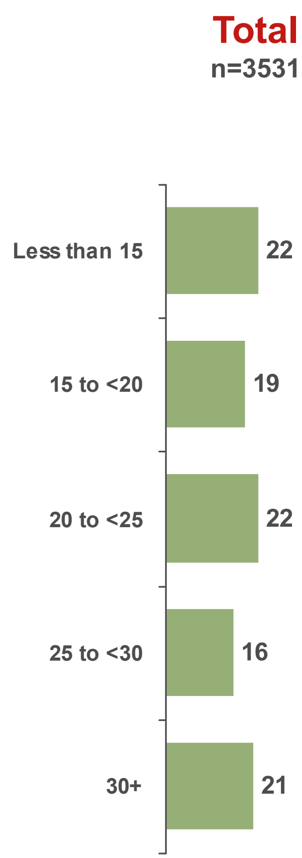
Age and Attendance at TAPA Performances

	Age					
	Total	<35	35-44	45-54	55-64	65+
n=	3531	654	488	687	909	793
	%	%	%	%	%	%
TAPA-Related Performances						
<5	18	25	24	20	15	8
5-7	23	19	27	26	24	18
8-9	20	20	21	21	19	18
10-14	28	25	20	23	30	36
15+	12	10	9	9	12	19
10+	40	35	29	31	42	55

Q. Varies
Base: Total sample

Combing attendance at 11 arts and cultural activities in the last year, a further index of total arts and cultural activity has been created.

Total Number of Arts and Cultural Activities Attended in the Last Year and HH Income



	HH Income				
	<$40K	$40-$80K	$80-$125K	$125-$200K	$200K+
n=	455	717	709	502	313
	%	%	%	%	%
Less than 15	20	21	24	23	16
15 to <20	17	21	18	18	20
20 to <25	22	23	22	22	21
25 to <30	18	13	16	16	21
30+	23	22	20	22	22

Q. Varies
Base: Total sample

As age increases, frequency of attendance rises slightly

Age and Attendance at Arts/Cultural Activities

	Age					
	Total	<35	35-44	45-54	55-64	65+
n=	3531	654	488	687	909	793
	%	%	%	%	%	%
All arts/cultural activities						
<15	**22**	**26**	**28**	**22**	**22**	**17**
15-19	**19**	**21**	**18**	**23**	**17**	**18**
20-24	**22**	**20**	**21**	**19**	**24**	**23**
25-29	**16**	**15**	**15**	**15**	**16**	**18**
30+	**21**	**18**	**18**	**20**	**21**	**24**
25 or more	**37**	**33**	**33**	**35**	**37**	**42**

Q. Varies
Base: Total sample

Preferred Type of Performing Arts

Key Findings

- Plays, with music a distant second, are the most preferred performing art. This may be a function of the TAPA membership, which is highly skewed toward theatre. There is also extensive evidence that theatre is the most frequently attended performing art, as well as the one with the most companies and venues.

- In terms of pairing of performing arts genres, those preferring plays are most aligned with music as a second choice, while those preferring dance and opera tend to be the most eclectic in their second choice of a performing art.

- Demographic profiles of the various performing arts that are most preferred show that those preferring dance are the youngest, most likely to be female, and have the lowest household incomes. Opera lovers, on the other hand, are the oldest, most likely to be male, and have the highest household incomes.

Preferred Type of Performing Arts

- Consistent with the fact that most TAPA member companies produce plays, when asked which type of performing art they most prefer, non-musical theatre is selected by half of respondents. This is also consistent with other research, going back many years, that has found that theatre tends to be the most attended of the performing arts.
- The popularity of all other performing arts falls below plays, with 18% of audiences each most preferring music or musicals,10% preferring dance and 5% preferring opera.
- When asked to identify their second preference, plays (29%) and music (28%) lead the way, followed by musicals (20%), dance (15%) and opera (9%).
- When first and second choices are combined; plays lead with 78%, making this a first or second choice, followed by music (46%), musicals (38%), and with dance (25%) and opera (14%) falling behind.
- When combinations of first and second choices are explored, those making plays a first choice have music (40%) and musicals (32%) for second choices. For those making musicals or music a first choice, plays are the most cited second choice.
- In the case of those making dance or opera a 1st choice, plays are less frequently cited and other genres also have some importance. This suggests that audiences for these genres are somewhat more eclectic in their preferences.

Preferred Type of Performing Arts

- There are also demographic profile variations related to the types of performing arts audiences prefer. Those who prefer dance are, on average, the youngest (45 years), predominantly female (75%), and the least affluent ($80,000 median household income). By contrast, opera lovers are the oldest (61 years), predominantly male (41%) and most affluent ($103,000 median household income).

- While those preferring each genre are highly educated, those preferring musicals tend to be slightly less likely to have a post-graduate or professional degree.

Plays and music are the two most preferred performing arts.

	First Choice	Second Choice	Total First and Second
n=	3531	3531	3531
	%	%	%
Plays	**50**	**28**	**78**
Musicals	**18**	**20**	**38**
Music	**18**	**28**	**46**
Dance	**10**	**15**	**25**
Opera	**5**	**9**	**14**

Q.5a Which are your two most preferred types of performing arts in order of preference?
Base: Total sample

Those who prefer musicals select plays as a second choice, but this is not the case of those who most prefer plays.

	First Choice				
	Plays	Musicals	Music	Dance	Opera
n=	1759	632	624	334	192
	%	%	%	%	%
Second Choice					
Plays	-	68	60	39	43
Musicals	32	-	11	18	12
Music	40	18	-	36	31
Dance	18	11	19	-	15
Opera	11	4	10	7	-

Q.5b Which are your two most preferred types of performing arts in order of preference?
Base: Total sample

Dance and opera lovers have the most varied profiles.

Most Preferred Type of Performing Art by Key Demographic Factors

	Most Preferred Performing Art					
	Total	Plays	Musicals	Music	Dance	Opera
n=	3531	1759	632	624	326	182
Median age (years)	**53**	**55**	**55**	**51**	**45**	**61**
Median Household Income ($1,000)	**$88**	**$89**	**$97**	**$91**	**$80**	**$103**
Percent Female	**66**	**66**	**66**	**63**	**75**	**59**
Percent Post graduate/Professional degree	**46**	**48**	**39**	**44**	**48**	**54**
Percent children 18 years of age and under	**13**	**14**	**10**	**13**	**17**	**7**

Q.
Base: Total sample

Most Recent Performing Arts Attended

Key Findings

- Consistent with the preference for plays, nearly half (48%) cite this genre as the type of performance most recently attended. However, it is also clear that TAPA audiences also attend a variety of genres.
- Sources of awareness of the most recent performance attended show great variation between how awareness is first raised, and how it is later sustained or reinforced.
- Initial important sources are subscriptions (23%) and word of mouth (17%). Among non-subscribers, word of mouth (24%), email or email blasts (16%) and to a lesser extent company websites (11%) are all of importance in first creating awareness.
- Awareness is reinforced and sustained by a variety of different channels including, most importantly, company websites (38% and 43% among non-subscribers), word of mouth (15%), email or email blasts (14%), newspapers (12%), and social media (11% and 16% among non-subscribers).
- The channels to which audiences respond varies greatly by age. In general, digital media is important among younger audiences, and print to those 55 years of age and above. For example, among those under 35 years of age, 31% cite social media as an important later channel for sustaining awareness, but it not as a channel for creating awareness (8%) among this age group. Company websites, though, are important as a later source across all age groups.

Most Recent Performing Arts Attended and Sources of Awareness

Genres most recently attended

- Consistent with the preference for plays, nearly half (48%) cite this genre as the type of performance most recently attended.
- Most respondents report attending with a spouse/partner (58%), or friends or family members (55%). There are significant gender differences; males are more likely to attend with a spouse/partner, and females with a friend or family member.

Main reasons for attending

- In terms of reasons for attending their most recent performance, the nature of the performance is most frequently cited as motivator. This is expressed either in terms of wanting to see the production/ presentation (50%), or wanting to see a specific artist or performer (37%).
- There are, in addition, a number of other motivators cited by respondents. A production/presentation appearing entertaining or interesting (28%) is cited, as is hearing repeatedly about a production (20%), or, related to this, reading a review (12%). The production being part of a subscription is also cited frequently (28%). Finally, in terms of motivators, the tickets being affordable (19%) is also cited.

Most Recent Performing Arts Attended and Sources of Awareness

- There are some differences in motivating factors between subscribers and non-subscribers and by the genre attended. Among subscribers, the most important motivator for attendance was inclusion in a subscription (54%). However, wanting to see the production or performer(s) is also cited frequently.

- When the genre is considered, for those who last saw a play both the production (54%) and the performers (54%) are equally important. This also appears to be the case where the last performance attended was music. In the case of opera, the production (57%) appears to be more important than who is performing (39%).

Sources of awareness

- Audiences first become aware of a performance through a wide variety of channels. In fact, the channels that create awareness are quite different from those that reinforce and deepen this awareness.

- Awareness of the most recent performance attended was first raised by either being part of a subscription series (23%), through word of mouth (17%) through an email blast from a performing arts company or performer (12%), or through a brochure mailed to home or work (10%). Notably absent in any significant way in raising awareness are visits to company/performer websites (8%).

- Once awareness of the most recent performance attended was created, it was reinforced through a number of channels, most importantly including visits to the company/performer website (38%). Word of mouth (15%) email blasts (14%) brochures mailed to home or work (9%) continue to be important. New channels reinforce awareness, including newspapers: articles (12%), reviews (10%) and advertising (8%). Social media (11%) and online advertising (6%) also reinforce awareness.

Most Recent Performing Arts Attended and Sources of Awareness

- Subscribers and non-subscribers report somewhat different sources of the first and subsequent awareness of the most recent performance they attended. For subscribers, not unexpectedly, having a subscription is easily (45%) the most important source of awareness.

- Among non-subscribers, there are a wide variety of ways they first became aware of the most recent production they attended. Word of mouth (24%), email or email blasts (16%) and, to a lesser extent, visiting company websites (11%) are all cited. Of interest is the fact that newspapers, social media or website advertising are cited as sources less than 6% of the time at this early stage of awareness building.

- Initial awareness is reinforced most importantly for non-subscribers by visiting a company website (43%), but at the same time, a number of other sources play a role including: word of mouth (19%), social media (16%), email blasts (15%) and newspapers. Of interest is that newspaper (6%) and online (8%) advertising are almost equally cited by non-subscribers as a later source of awareness.

- Among subscribers, it is important to note the role newspapers play at this later stage. Subscribers cite newspapers generally twice as frequently as non subscribers. This is likely (as noted later) a function of age, with subscribers being older than non-subscribers and therefore more print reliant. At the same time, subscribers are likely already aware of productions they are going to be attending, and may therefore be more likely to notice articles, reviews or advertising about these productions. .

Most Recent Performing Arts Attended and Sources of Awareness

- There are few variations in sources of awareness by genre. In the case of those reporting an opera was the most recent performance they attended, newspaper articles, reviews and advertising are mentioned more frequently as later sources of awareness than other genres, as are brochures mailed to the home. It should be recalled, that audiences for this genre are older, on average, than others, and likely still heavily print reliant.

- In the case of dance, social media (17%) is mentioned as an important later source of awareness, well above the average (11%). This group is the youngest on average.

- Age, in fact, has a significant impact on how audiences first become aware and later learn about a production. The key differences by age are related to their use of print and digital channels.

- Considering how attendees first learnt about the performance they last attended, and those channels that vary most by age, three stand out. Easily the most important among younger audiences is word of mouth. In all, 30% of those under 35 years of age report this as the first way they became aware of the production. The frequency of this channel as a first source declines with age, to the point that among seniors, only 9% cite this channel. In addition, among those under 35 years of age, email/email blasts (14%) and visiting a company website (12%) are also used as first sources of awareness, and thereafter decline across age groups. But compared with word of mouth, these two channels are relatively unimportant at the first stage of awareness.

- Among older audience members, awareness is generated most frequently because the performance was part of a subscription (31% - 55 to 64 years and 39% - seniors). A variety of other channels are also used, but none with any great frequency.

Most Recent Performing Arts Attended and Sources of Awareness

- Awareness is also reinforced differently across age groups. Company websites are the single biggest source, irrespective of age, but especially for those under 35 years of age (50%). It is progressively less used, such that among seniors. only 26% report using this channel.

- After company websites, the second most important channel for sustaining awareness among younger audience members (under 35 years) is social media (31%). This channel declines steadily with age to the point that among seniors, only 2% cite its use. Word of mouth is the third most cited source among those under 35 years (24%), and again declines with age. Much the same pattern is apparent for email/email blasts (22% among those under 35 years) and, to a lesser extent, online advertising (14% among this group).

- Among older audiences, newspapers, with the exception of company websites, replace the role played by digital media among younger audiences. For seniors, newspapers are the second most important source for reinforcing initial awareness. This includes articles (18%), reviews (12%), and advertising (11%). Reported usage as a reinforcing channel drops among each younger cohort.

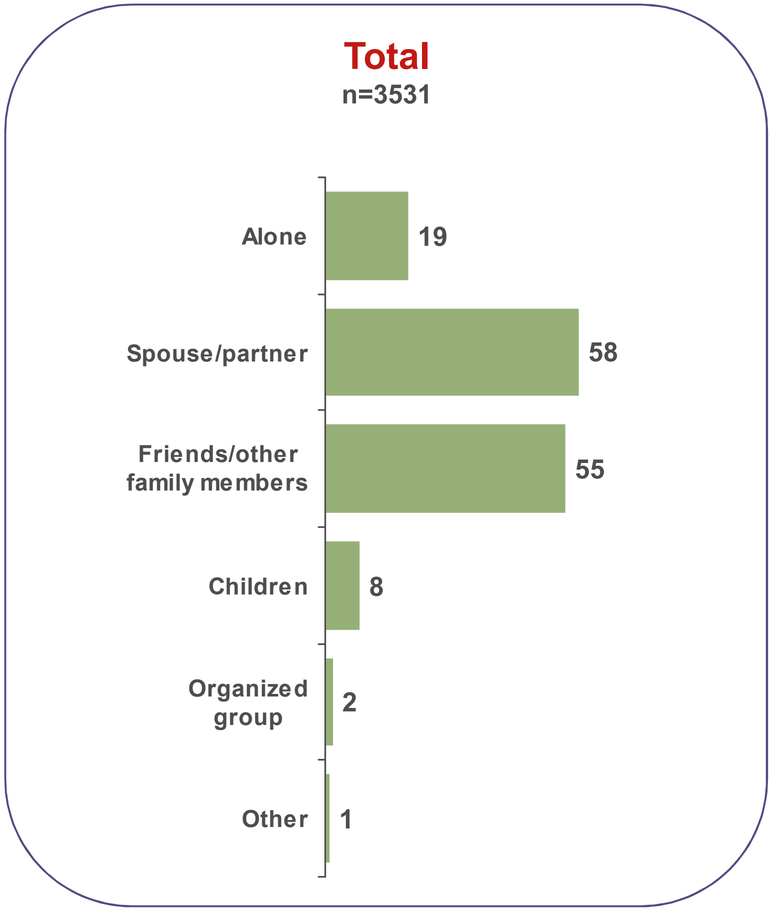
In addition to plays, a wide variety of genres have been recently attended (by audiences).

Most Recent Performances Attended

	First Most Recent	Second Most Recent	First Most Recent: Music	First Most Recent: Musicals	First Most Recent: Non-Musical Plays	First Most Recent: Dance	First Most Recent: Opera
n=	3293	3000	602	413	1434	299	242
	%	%	%	%	%	%	%
Most Recent							
Non-Musical Plays	48	42	35	36	52	24	33
Music	20	20	27	15	18	17	22
Musicals	14	12	9	31	11	6	7
Dance	10	11	10	5	7	40	9
Opera	8	6	7	3	4	3	23
Other	-	10	12	9	8	11	7

Q.18b Next most recent – Type of performance
Base: Total sample

Males and females have different patterns regarding with whom they attend .



	Gender	
	Male	Female
n=	1196	2330
	%	%
Alone	19	19
Spouse/partner	68	52
Friends/other family members	41	63
Children	6	9
Organized group	2	3
Other	1	1

Q.15 When you go out for entertainment, do you usually go . . .
Base: Total sample

Main Factors Encouraging Attendance at Most Recent Event

	Subscribe			Type of Event Attended				
	Total	Yes	No	Plays	Musicals	Dance	Music	Opera
n=	3531	1723	1808	660	474	1587	318	254
	%	%	%	%	%	%	%	%
Really wanted to see production/presentation	50	45	54	54	20	33	60	57
Really wanted to see artists/performers	37	29	44	54	20	34	53	39
Part of subscription	28	54	2	17	44	25	17	48
Looked entertaining/interesting	28	24	31	26	29	30	26	16
Heard a lot about artist/production/performance	20	15	24	15	18	21	25	19
Tickets were affordable	19	14	24	19	16	21	20	13
Read a good review	12	12	12	5	11	15	10	13
It was a night out	12	7	11	11	12	8	8	4
Gift/complimentary tickets	8	5	11	6	8	8	12	10
Other	13	9	16	14	12	13	14	10

Q.
Base: Total sample

Initial channels of awareness of a most recent performance are different from those that reinforce this awareness (only those channels with 5% or more are shown for subscribers)

Sources of Awareness of Most Recent Event Attended

	Total		Subscriber			
			Yes		No	
	First	Later	First	Later	First	Later
n=	3413	3367				
	%	%	%	%	%	%
Visited companies website	8	38	5	33	11	43
Part of a subscription series	23	9	45	16	1	3
Word of mouth	17	15	10	11	24	19
Email/Eblast	12	14	8	13	16	15
Brochure mailed to my home/work	10	11	11	15	8	7
Newspaper article	3	12	3	16	4	8
Social media	4	11	1	6	6	16
Newspaper review	1	10	1	12	1	7
Newspaper advertisement	2	8	2	10	3	6
Online advertising	1	6	1	5	2	8
Visited other website	2	3	-	-	-	-
Billboard/outdoor advertising	1	4	1	3	1	5
Picked up brochure	2	2	-	-	-	-
Radio advert	1	2	-	-	-	-
Online review	<1	3	-	-	-	-
Brochure inserted in newspaper	<1	2	-	-	-	-
TV advertisement	<1	2	-	-	-	-
Transit advertising	<1	2	-	-	-	-
TV comment/show	<1	1	-	-	-	-
Other	8	4	-	-	-	-
Don't recall	2	4	-	-	-	-
None of these	2	6	-	-	-	-

Q.19 Through what source did you first become aware of this event and where else did you see, hear or read about It?
Base:

Younger audiences are highly focused on digital media as sources of awareness, while older audiences remain print oriented. Word of mouth is a factor across all age groups, but especially younger audiences.

Main Sources of Awareness of Most Recent Event Attended and Age

	Total		Age									
	Total		<35		35 - 44		45 - 54		55 - 64		65+	
n=	3413		620		471		661		887		774	
	First	Later	First	Later	First	Later	First	Later	First	Later	First	Later
	%	%	%	%	%	%	%	%	%	%	%	%
Visited companies website	8	38	12	50	11	45	9	40	7	35	5	26
Part of a subscription series	23	9	6	7	10	5	20	8	31	10	39	14
Word of mouth	17	15	30	24	19	17	18	14	13	11	9	12
Email/Eblast	12	14	14	22	18	18	12	18	11	12	7	8
Brochure mailed to my home/work	10	11	6	12	7	9	11	10	11	12	12	13
Newspaper article	3	12	1	6	3	8	3	9	4	16	5	18
Social media	4	11	8	31	7	18	4	8	1	4	1	2
Newspaper review	1	10	1	6	1	5	1	9	1	13	1	12
Newspaper advertisement	2	8	1	4	2	3	3	8	2	10	4	11
Online advertising	1	6	2	14	<1	6	1	5	1	5	1	3
Visited other website	2	3	2	4	2	5	2	4	1	3	1	2
Billboard/outdoor advertising	1	4	1	8	2	5	1	4	<1	3	1	1

Q.19 Through what source did you first become aware of this event and where else did you see, hear or read about It?
Base:

Engagement with Arts and Cultural Activities

Key Findings

- Attending arts and cultural activities is the third most non-work non-shopping activity cited. In all, 83% across all age groups reported undertaking this activity.
- A high level of engagement is also apparent: 46% report being a member of an arts or cultural organization (most typically the AGO), 49% report subscribing, and 52% report donating to an arts or cultural organization. Spending of over $500 a year on arts and cultural activities is a further expression of engagement, and 64% report this level of spending.
- It is clear that memberships, subscribing and donating vary greatly by age group. Younger audiences are less likely than to be members of an arts organization or to subscribe. While income is a factor influencing membership and subscribing, this is not the explanation for the declining level of memberships and subscriptions at each successively younger age group. In the case of donating, this appears to be less linked to age, yet still shows some decline with age that is not strictly linked to income.
- Spending on the arts is highly dependent on income but age is also a factor. Audiences spending $500 or more per year increase dramatically as household income increases. This number also increases with age. This may be a factor of younger audiences having less disposable income, or, despite high levels of attendance and interest, choosing to spend their money differently.
- These findings suggest that younger audiences have a substantially different way of engaging (aside from attendance) with arts and cultural activities compared to their older counterparts.

Engagement with Arts and Cultural Activities

- Consistent with the generally high level of involvement with the performing arts, when asked to identify their main activities undertaken outside the home (aside from work or shopping), attending an arts or cultural event or activity is the third most frequently cited activity.

- In all, 83% report this type of activity. More importantly, when age is considered, there is little variation in the proportion reporting attending an arts and cultural event or activity in the last month.

- Engagement is also evident in the fact that close to half (46%) of audiences report being a member of an arts or cultural organization. The AGO (33%) is most cited, followed by the ROM (15%), Stratford (12%),TIFF (11%) and Shaw (7%).

- Membership is highly correlated with age, and, as age increases, so does the proportion citing at least one membership. Among those 35 years of age and under, only 23% report a membership and among those 65 years and older, 65% report at least one membership.

- The likelihood of having at least one membership in an arts or cultural organization is also highly associated with household income. As income increases so does the proportion citing a membership. Among those with household incomes of less than $40,000, only 26% report a membership, while in the highest income group ($200,00 or more) 66% report a membership.

- But income is not the only determining factor, since among audiences income peaks between ages 45 and 64 years, and then drops to levels similar to those aged 35 to 45 years of age. Yet membership continues to increase.

Engagement with Arts and Cultural Activities

- This suggests that this form of engagement is somewhat, but not completely, divorced from income and that, to some extent, younger audiences have different patterns of engagement. Furthermore, membership as a form of engagement is constantly changing as new generations of people engaged with the arts and culture enter the stage.

- The evidence for this is found when membership is examined by both age and household income. At each age group (except those under 35 years of age) higher household income earners are more likely to be members of arts and cultural groups. However, as age decreases, those in the same income group are less likely to have a membership. The implication is clear: membership is declining across age groups, irrespective of income. Furthermore, among those under 35 years, there appears to be, at best, a very weak relationship between membership and income.

- Much the same pattern of engagement is apparent for the purchase of subscriptions. In all, half (49%) report currently having a subscription. Once again, this is heavily age dependent. Only 19% of those 35 years and under report a subscription, compared to 73% of seniors. Once again, this is also highly household income dependent with only 22% of the lowest income group (under $40,000), but 67% of the highest income group ($200,00 or more) reporting currently having a subscription.

- When age and income are combined, it is the case that for each age group those earning higher incomes are more likely to be subscribers. For example, among those under 35 years of age in households with incomes of $60,000 or less, only 13% have a subscription, while among those with incomes of $100,000 or more 33% have subscriptions. In both cases, this is well below the overall average of 49%. By comparison, the same percentages for the same two income groups among seniors are 63% and 72%, respectively.

Engagement with Arts and Cultural Activities

- This is obviously not a factor of disposable income, but of choice. It indicates significant changes over time in the way audiences buy tickets and engage with the performing arts and of the kinds of performing arts with which they engage. For example, it is quite possible that many younger audiences may not engage with companies and performers that offer subscription series.

- Part of the explanation can be found in the reasons given for purchasing a subscription. Making planning easier and greater flexibility (61%), cheaper seats (46%), convenience (32%) and not having to worry about sold out performances (31%) are the main reasons cited. When age is considered, planning is of limited importance to younger audiences (under 35 years) who subscribe, and affordability is easily the most important factor (44% to 59%, respectively). This is also the main motivator for those anxious about money.

- In all, 86% of TAPA audiences report donating to a charity or not-for-profit organization in the last year. Audiences donate to a wide variety of organizations. Some sign of the significance that arts and culture play in most respondents lives is the fact that among donors, as many report donating to health charities as donating to arts and cultural organizations (61% to each).

- Donating behaviour and donating to arts and cultural organizations is also age and household income related. However, the relationship is far weaker than for memberships and subscriptions. Among younger attendees, the majority (70%) report donating, although only 41% of those under 35 years report donating to an arts and cultural organization. In comparison, those most likely to donate are seniors (94%) and this group is also the most likely to donate to arts and cultural organizations (64%).

Engagement with Arts and Cultural Activities

- The difference between the two age groups, though, is far narrower than for memberships and subscriptions. It may well be, however, that younger attendees donate far less money than older ones. This is likely the case, based on household income differences and the fact that those with lower levels of income are less likely to donate to arts and cultural organizations. As noted earlier, those in the youngest age group also have the lowest household incomes.

- The amount spent on arts and cultural activities is a further measure of engagement. Among audiences, two thirds (64%) report spending $500 or more on these activities per year. This varies greatly by available income, with only a third of those with household incomes of less than $40,000 a year reporting spending this amount, and 94% of the highest income group reporting this level of spending on arts and cultural activities. The spending by seniors is particularly impressive.

- Spending is also a function of age. The proportion spending $500 or more increases with age. Among those under 35 years of age, only 36% spent this amount on arts and cultural activities, while among those over 45 years of age, the proportion rises to 70% or more.

- Given the correlation of age with household income, it is likely that the lower level of spending among those under 45 years of age is, in part, a function of income. But, as noted earlier, it is likely that patterns of spending are also a function of choices in the performing arts attended, and the cost of tickets bought.

- At the same time, the level of spending on the performing arts among those under 35 years of age, in fact, represents a larger share of their household income than for other age groups. In all, $500 spent on arts and cultural activities for those under 35 years of age represents 1% of median household income compared with 0.5% among those 45 – 54 years of age, and 0.6% for 35 – 44 year olds and seniors.

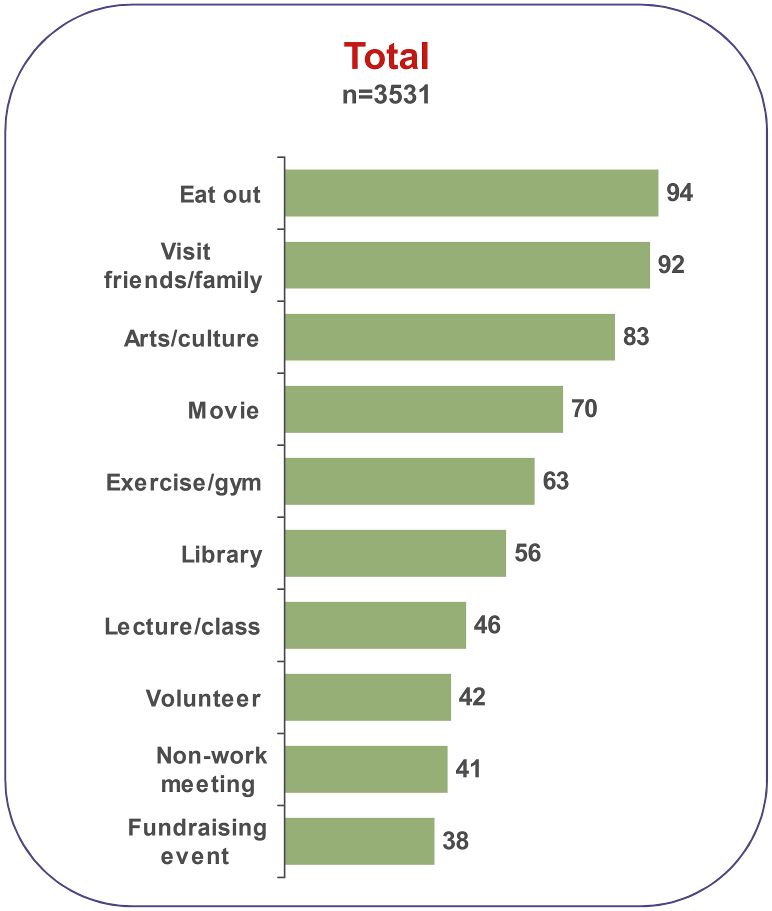
Engagement with Arts and Cultural Activities

- Continuing with differences in engagement by genre preferred, opera lovers are, in addition to being the most likely to subscribe, also are the most likely to both donate (77%) to, and be a member (66%) of arts and cultural organizations. This group also tends to be the most affluent and oldest; both of which are highly correlated with these activities.

- On the other hand, those preferring musicals are the least likely to donate (46%) and be a member (30%) of arts and cultural organizations.

- Those preferring other genres fall between these two extremes.

Main Activities Undertaken Outside the Home in the Last Month (Top 10)

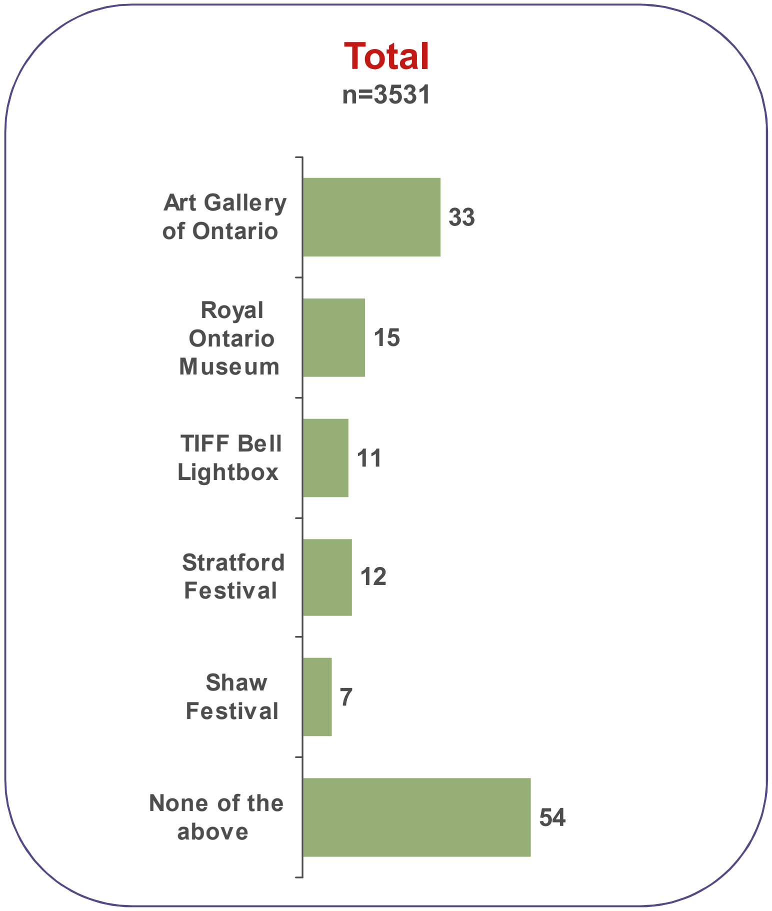


	Age				
	<35	35-44	45-54	55-64	65+
n=	654	488	687	909	793
	%	%	%	%	%
Eat out (non-fast food)	96	96	92	93	92
Visit friends/family	93	93	92	93	92
Arts/culture	84	85	82	81	82
Movie	72	68	67	70	75
Exercise/gym	71	65	62	63	58
Library	58	58	51	54	61
Lecture/class	51	40	41	45	49
Volunteer	40	34	42	45	47
Non-work meeting	41	37	43	42	41
Fundraising event	43	36	41	45	34

Q.13a Aside from work or shopping, what kinds of activities did you undertake in the last month outside your home?
Base: Total sample

Membership is highly age and income dependent, but is primarily a function of age.

Membership In Arts/Cultural Organizations and HH Income



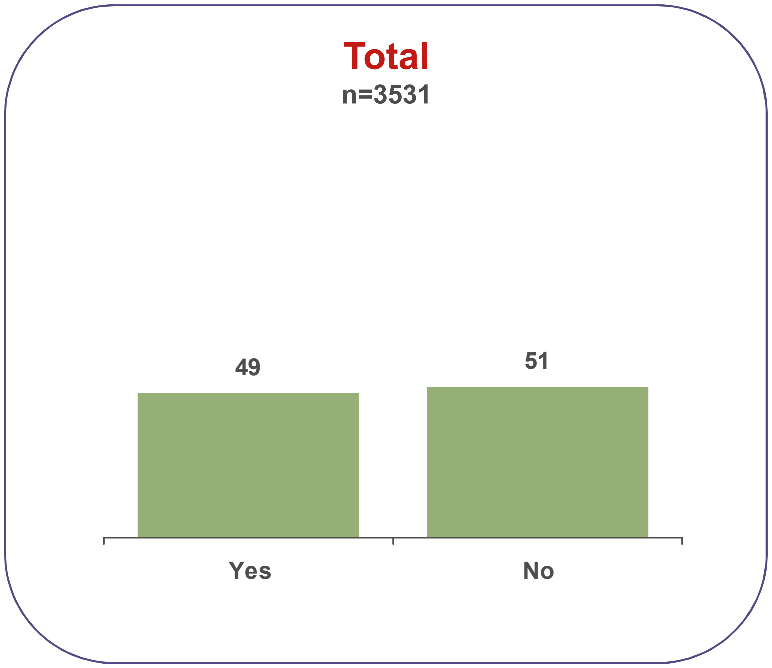
	HH Income				
	<$40K	$40-$80K	$80-$125K	$125-$200K	$200K+
n=	455	717	709	502	313
	%	%	%	%	%
Art Gallery of Ontario	**19**	**31**	**33**	**38**	**50**
Royal Ontario Museum	**5**	**12**	**14**	**19**	**28**
TIFF Bell Lightbox	**8**	**10**	**11**	**14**	**13**
Stratford Festival	**5**	**10**	**12**	**14**	**21**
Shaw Festival	**2**	**6**	**7**	**9**	**14**
None of the above	**74**	**57**	**55**	**46**	**34**

	Age				
	<35	35-44	45-54	55-64	65+
n=	654	486	687	909	773
	%	%	%	%	%
Membership					
None	**77**	**63**	**53**	**50**	**35**
One or more	**23**	**37**	**47**	**50**	**65**

Q.7 Are you currently a member of any of the following?
Base: Total sample

Subscription purchasing is also highly age and income dependent.

Subscriptions and HH Income



	HH Income				
	<$40K	$40-$80K	$80-$125K	$125-$200K	$200K+
n=	455	717	709	502	313
	%	%	%	%	%
Yes	**22**	**44**	**47**	**55**	**67**
No	**78**	**57**	**53**	**45**	**33**

	Age				
	<35	35-44	45-54	55-64	65+
n=	654	488	487	909	793
	%	%	%	%	%
Subscription					
Yes	**19**	**32**	**46**	**60**	**73**
No	**81**	**68**	**54**	**40**	**23**

Q.8 Do you currently have subscription tickets to any arts and cultural companies/activities (e.g. theatre, music, dance, etc.)?
Base:

Main Reasons for Purchasing Subscriptions

	Total	Anxiety about Money					Age				
		High 1	2	3	4	Low 5	<35	35-44	45-54	55-64	65+
	%	%	%	%	%	%	%	%	%	%	%
Makes planning easier/More flexibility	61	53	56	60	67	63	44	51	55	62	69
Cheaper seats	46	62	49	49	40	36	59	57	50	40	43
More convenience	32	28	26	31	33	38	30	32	24	28	39
Don't have to worry about sold out performances	31	28	32	31	32	34	30	30	28	32	32
Ability to share tickets	13	13	14	15	13	10	15	9	14	13	14
Other	18	21	17	16	19	19	21	15	23	15	18

Q.
Base:

The proportion of the TAPA audience donors donating to arts and cultural organizations is as great as that for health care, which is typically the main recipient of cash contributions from the public.

Donation Behaviour

	Total
n=	3531
Type of charitable not-for-profit organization	%
Arts/culture	**61**
Health care/Hospitals	**61**
Social service	**42**
International	**34**
Environment	**33**
Education	**25**
Other	**14**

Q. 21 Which type of charitable/not for profit organization(s) have you donated in the last year?
Base: Total sample

Donating in general, and donating to arts and cultural organizations in particular, is both age and household income related.

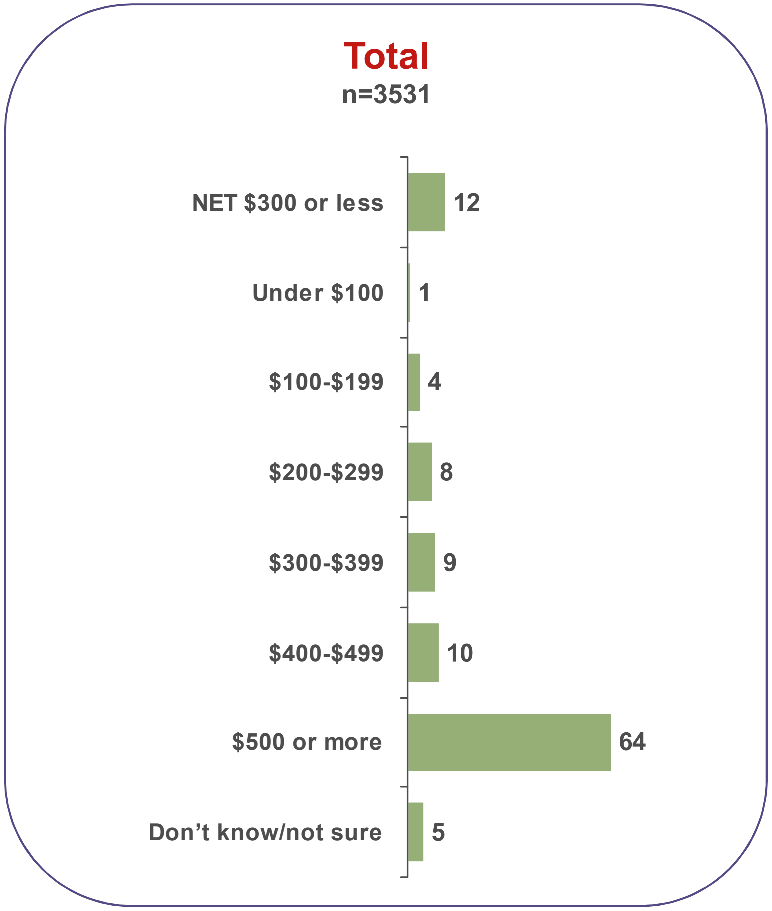
Donating to Arts/Cultural Organizations and Age and HH Income

	Total	Age					HH Income				
		<35	35-44	45-54	55-64	65+	<40	40-80	80-125	125-200	200+
n=	3531	654	488	687	909	793	455	717	719	502	313
	%	%	%	%	%	%	%	%	%	%	%
Donate	86	70	82	89	89	94	66	83	89	91	96
Donate to arts/cultural organizations (among donors)	61	58	57	58	60	68	62	59	61	62	73
Donate to arts/cultural organizations (all respondents)	52	41	47	52	54	64	41	50	54	57	70

Q. Varies
Base: Total sample

Spending on arts and cultural activities is, in part, a factor of available income

Yearly Spending on Arts/Cultural Activities and HH Income and Age



	HH Income				
	<$40K	$40-$80K	$80-$125K	$125-$200K	$200K+
n=	455	717	709	502	313
	%	%	%	%	%
NET $300 or less	31	17	9	5	1
Under $100	3	2	-	<1	-
$100-$199	10	6	2	1	<1
$200-$299	19	10	7	4	<1
$300-$399	17	12	11	6	1
$400-$499	12	14	12	8	4
$500 or more	33	55	65	80	94
Don't know/not sure	6	2	3	2	<1

	Age				
	<35	35-44	45-54	55-64	65+
n=	varies				
	%	%	%	%	%
Percent $500 or more a year	36	54	70	76	74
Median Income (1,000)	$47	$38	$107	$108	$88
Percent Represented by $500	1.1	0.6	0.5	0.5	0.6

Q.13 How much do you estimate that you spend in a year on arts and cultural activities of all types?
Base: Base sizes vary

Profile by Genre Subscribed to

	Total	Subscribe				
		Theatre	Musicals	Music	Dance	Opera
n=	3531	1387	216	467	216	346
	%	%	%	%	%	%
Median Age (years)	53	61	58	65	60	63
Median HH Income ($1,000)	$88	$103	$100	$107	$108	$113
Percent Female	66	68	58	67	71	61
Percent Post-Graduate/Professional School	46	50	48	60	62	61
Percent Children 18 and under	13	10	6	9	9	7

Q.
Base:

Profile of Subscribers and Arts/Cultural Donors

	Total	Subscribers		Among Donors -- Donates to Arts	
		Yes	No	Yes	No
n=	3531	1723	1808	1844	1182
	%	%	%	%	%
Median Age (years)	53	59	46	60	53
Median HH Income ($1,000)	88	135	77	97	90
Percent Female	66	67	66	64	71
Post Graduate/Professional School	46	52	41	51	45
Percent Children 18 and under	13	11	16	13	16

Q.
Base:

Preferred Genre and Genre Subscribed, Donation and Membership

	Total	Preferred Genre				
		Plays	Musicals	Music	Dance	Opera
	3531	1387	632	624	324	182
	%	%	%	%	%	%
Subscribe	49	46	65	40	36	71
Plays	80	90	91	62	57	46
Musicals	13	6	29	8	10	13
Music	27	23	14	57	29	34
Dance	15	11	6	15	77	18
Opera	20	16	4	24	17	89
Don't subscribe	51	54	35	60	64	29
Donate to arts/culture (among donors)	61	63	46	58	63	77
Member of arts/cultural organization	46	50	30	46	47	66

Q.
Base:

Attitudes Toward Arts and Cultural Activities

Key Findings

- While age and income clearly have an impact on arts and cultural activities and choices, it is likely that attitudes towards these activities is a contributing factor to engagement. Two sets of questions were answered by respondents that probe this issue.

- First, from a list of 20 non-institutional attributes, both the number and variety of performing arts venues, artists and companies were the main reason for making Toronto an attractive place to live and work. This gain suggests the importance of arts and cultural activities for TAPA audiences.

- Second, a series of statements were designed to probe attitudes and behaviours, showing the following:
  - Most, but not all, audience members have some awareness of the arts and cultural activities in the city;
  - 22% report that they are attending fewer performances than five years ago;
  - Close to half of the audience members would like to go to more activities, but say they can't afford to;
  - Most believe the quality of performing arts in Toronto is as good as anywhere in the world;
  - Most parents with young children who are also part of the TAPA audience seek activities that are child-friendly; and
  - As many as one third of TAPA audiences can be described as highly passionate about the performing arts.

- While age and income clearly have an impact on arts and cultural activities and choices, it is likely that attitudes towards these activities is at least as important as a contributing factor to engagement. Two sets of questions were answered by respondents that probe this issue.

Attitudes Toward Arts and Cultural Activities

- The first set was designed to understand how important the performing arts are in making Toronto and the Toronto area an attractive place to live and work. Respondents were offered a list of 20 attractions, and asked to select their top five. Because attributes like work, education and health care institutions are of such necessary importance, these were not included in the list. The list, however, did contain a wide range of attractions that are often cited as making Toronto an attractive place to live and work.

- The importance of the performing arts for TAPA audiences is evident from the two attractions most frequently selected:
  - The number and variety of venues for the performing arts (54%); and
  - The number and variety of performers and or performing arts companies (49%).

- Virtually tied with performers and companies, as an attraction, was the *cultural diversity of the city* (48%).

- Of interest is the fact that these attributes are key attractions across all age groups, although slightly stronger with older age, and are important attractions for both males and females.

- A further measure for attitudes toward arts and cultural activities was having audiences respond to a series of agree/disagree statements. A series of nine were administered.

Attitudes Toward Arts and Cultural Activities

- These nine statements can be divided into seven types, and will be dealt with in groupings. These are:
  - Awareness of the arts and cultural activities taking place in Toronto;
  - Trend in the number of performing arts events attended;
  - Quality of arts and cultural activities in Toronto;
  - Ability to afford to attend all desired performing arts;
  - Creativity in the arts;
  - Taking children; and
  - Feelings toward arts and cultural activities and meaning attributed to them

Awareness of Arts and cultural Activities

- Most (85%) audience members surveyed disagree and 54% do so strongly, that they:

  I have very little awareness of what arts and cultural activities take place in Toronto

- However, 7% agree and a further 7% are unsure. Overall, these responses suggest that, in most cases, lack of awareness of what is taking place in Toronto is not a major reason for a lack of attendance. It should be pointed out, however, and will be explored in more detail later in this report, that those attending least frequently are the most likely to agree that they are not aware. However, as noted later, this may be as much a function of lack of interest as a lack of awareness.

Attitudes Toward Arts and Cultural Activities

Trend in the number of performing arts events attended

- Most audience members are attending fewer performing arts events as evidenced by their response to the statement:

Compared with five years ago, I am going to fewer performing arts events

- In all, 63% disagree with the above view, and 40% do so strongly. This does not mean they are going to more, but they certainly believe they are not attending fewer performances.

- A further 22%, however, agree they are going to fewer and 15% are undecided on this issue. While some audience members may be attending more frequently (this issue was not probed), the fact that over a third believe they are attending less frequently or are not sure, indicates that potential declines in attendance have taken place in the last few years. This important issue will be explored in the next section.

Quality of arts and cultural activities in Toronto

- In order to both assess perceptions of the quality of cultural performances in Toronto, and to determine if perceptions of quality may be a barrier to attendance, audiences were asked to respond to the statement:

The quality of the arts and cultural performances in Toronto is as good as anywhere in the world

Attitudes Toward Arts and Cultural Activities

- In all, three quarters of TAPA audiences agreed with this view and 36% did so strongly. In other words, many believe the quality of performances in Toronto is world class.
- However, the fact that 39% somewhat agreed and a quarter were either not sure (10%) or disagreed (15%) suggests that a substantial share of audiences question the world class quality of Toronto productions.
- The potential impact of these views on attendance will again be assessed in the next section.

Ability to afford to attend all desired performing arts

- In order to measure the extent to which audience members could afford to attend all desired performances they responded to the statement:

I can usually afford to go to all the performing arts events I want to see

- In all, only half (48%) of audience members agreed that they could afford to attend all the events they wanted to see, although only 16% strongly agreed. This suggests that there is a considerable unfulfilled desire to attend performances, but for the costs involved.
- Not unexpectedly, responses to this issue are very much driven by household income, with those in the lower income groups being much more likely to agree that cost does limit their engagement than those at the highest income levels.

Attitudes Toward Arts and Cultural Activities

Creativity in the arts

- One statement explored this issue and simply said:

The artists and arts organizations that I support are usually very creative in what they present

- This statement evoked some of the strongest agree (86%) responses, including a large 40% strongly agreeing. In essence, respondents appear to be agreeing that the artists and companies whose performances they attend are highly creative.

- Responses to this issue appear to be highly contingent on the frequency of attending performing arts activities, but is correlated with little else. In other words, the more performances attended, the greater the likelihood of believing the works seen are highly creative.

- At the same time, some responses to this view, when explored by preferred genre or by genre subscribed to, show significant variations by genre. For example, those preferring and subscribing to musicals are far less likely than others to strongly agree with this point of view and may, in fact, place limited importance on creativity.

Attitudes Toward Arts and Cultural Activities

- Similarly, music shows a contradictory response across the two measures (preference and subscription). Among those with a preference for music, the proportion strongly agreeing is below average, while among those subscribing to music it is well above the average. Most likely, different music genres are being dealt with. In the case of a music preference, as noted earlier, this genre includes all types of music, and is undefined, meaning perhaps that creativity is not especially valued. Among those subscribing to a music series, which may include the TSO, there is a far stronger valuing of creativity.

Taking Children

- This area examined the impact of children:

When I seek out activities outside of the home, it is usually things I can do with my kids

- In all, only 16% of respondents agreed with this point of view, largely because most (86%) do not have children 18 years or under. Among those under 45 years of age with children 18 years of age or under, 59% agree with this point of view. This suggests, and the life stage analysis bears this out, that the presence of children 18 years of age or under is a significant deterrent to attending performing arts activities unless, as noted above, they are child-friendly. This issue will also be addressed more thoroughly in the next section.

Attitudes Toward Arts and Cultural Activities

Feelings toward arts and cultural activities and meaning attributed to them

- Three statements were used to assess overall responsiveness to arts and cultural activities. These are:
  - ***Some of the most meaningful experiences of my life have been when watching a performance of some kind;***
  - ***The performing arts can transform lives; and***
  - ***When I go out to attend a performing arts event, I simply want to relax and be entertained.***

- Responses to the first two statements indicate that large numbers (80% or more) of audience members agree with these perspectives. The view that respondents simply seek entertainment and a chance to relax is more divisive, with equal numbers agreeing (42%) and disagreeing (39%), and with 20% unsure.

- This scale will be used extensively in the next section to better understand attendance patterns.

- In order to undertake further analysis of this key issue of the meaning attributed to arts and cultural activities, responses of each respondent to the three statements were combined to provide and create a passion for the arts score.

Attitudes Toward Arts and Cultural Activities

- This resulted in a six category index that sorts audiences into high to low passion for the arts. One third (18% and 14% of audiences, respectively) are rated as having a very high or high passion, a further third are rated as having a middling passion, and the other third (35%) are rated as having a low or very low passion for the arts.

- Those scoring high on this index are generally below 54 years of age, and mostly under 35 years (24% in this group scored in the top passion for the arts category).

- However, it should be kept in mind that this scale is relative, and that even those defined as having low passion are nonetheless audience members who attend performances, and therefore have some interest and involvement. It may be the case that a strong passion for the arts does not, in all cases, drive engagement.

Toronto's Most Important Attributes (Top 10)

	Total
n=	3531
	%
Number and variety of venues for performing arts	54
Number and variety of performing arts performers and companies	49
Cultural diversity of the city	48
The public transportation system	41
Number and variety of restaurants	39
Family and friends	36
Safety of the city	33
Number and variety of distinct neighbourhoods	30
Number and quality of museums and art galleries	30
Number and variety of parks/ravines	28

Q.14 What are your top five attributes from the list below that are important to you personally in making Toronto/the Toronto area an attractive place to live and work?

Base: Total sample

Statements dealing with attitudes toward arts and cultural activities

Arts/Cultural Perspectives

	NET	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
	%	%	%	%	%	%
I have very little awareness of what arts and cultural activities take place in Toronto	7	1	6	7	31	54
Compared with five years ago, I am going to fewer performing arts events	22	6	16	15	23	40
The quality of the arts and cultural performances in Toronto is as good as anywhere in the world	75	36	39	10	12	3
I can usually afford to go to all the performing arts events I want to see	48	16	32	8	23	20
The artists and arts organizations that I support are usually very creative in what they present	86	40	46	11	2	1
When I seek out activities outside of the home, they are usually things I can do with my kids	16	4	12	20	15	48
Some of the most meaningful experiences of my life have been when watching a performance of some kind	75	35	40	16	6	3
The performing arts can transform lives	87	54	34	10	1	1
When I go out to attend a performing arts event, I simply want to relax and be entertained	42	14	28	20	25	14

Q.17 For the following statements about arts and culture, please indicate how much you agree or disagree with each?
Base: Total sample

Passion for the Arts Index and Age

	Age					
	Total	<35	35-44	45-54	55-64	65+
n=	3531	654	488	687	909	793
	%	%	%	%	%	%
Passion for Arts						
High 1	18	24	18	16	17	17
2	14	18	16	12	13	13
3	15	17	16	16	14	13
4	18	13	17	21	19	11
5	15	12	16	13	16	10
Low 6	20	16	17	23	21	13
Top 2	32	42	34	38	30	30

Q. Varies
Base: Total sample

Factors Associated with Attendance

Key Findings

- A wide variety of factors have been explored to explain attendance at arts and cultural activities. Attendance does not appear to vary much by age, with the exception of those with children 18 years of age and under who are far below the average for their age groups in attending performances.

- Household income is another factor that impacts attendance, but not in a linear fashion (i.e. as income increases so does attendance). In fact, one of the groups that attend the most are those under 35 years of age and with a below average household income. This group is typically made up of single people or households without children and with a high interest in arts and cultural activities.

- Cost is a factor influencing attendance: two thirds say it is a somewhat important factor, with half saying it is a very large factor. And those believing it influences their decision to attend paid arts and cultural activities are much less likely to attend frequently. There is also attitudinal evidence that there is significant unrealized demand to attend performances, but for cost-related concerns.

- There is a portion of the population that is attending fewer performances than five years ago. While this is, in part, a function of child-raising, it is also a function of being time-stressed (not enough hours in the day) and money-stressed (18% of audiences have a high level of anxiety around finances).

- The end result of money stress is that large numbers in this group are unable to attend all the performances they would like to. Again, this suggests unrealized demand.

Key Findings

- Two potential constraints on attendance are limited awareness of arts and cultural activities in the City and perceptions of the quality of arts and cultural performances. Neither is a significant barrier to attendance.

- The single most important factor leading to attendance is the extent to which a member of the audience is passionate about the arts and cultural experience. Those with a strong degree of passion for the arts are easily the most likely to attend performances and other arts and cultural activities frequently.

- A passion for the arts is not limited to any one age group, but is more likely to be found among those under 55 years of age. At the same time, a passion for the arts is spread across all income groups, but tends to be strongest among those with household incomes of less than $40,000. It is somewhat less intense among the highest household income groups.

- The irony here is that those who appear to be most passionate about the arts (younger and less affluent) are those who are in the least favourable position to spend on attending performances. At the same time, they tend to resist one option that would facilitate this; namely, subscriptions.

- Another challenge raised by this research (given the importance of a passion for the arts in driving attendance) is understanding how to inculcate a passion for the arts more widely.

Factors Associated with Attendance

Introduction

- This section of the report explores the key factors associated with attendance. That is what drives and what undermines attendance both attitudinally and demographically (life situation). Many of these factors have already been introduced. In this section their impact will be explored more fully.
- Age and household income have already been considered in terms of their impact on participation in arts and cultural activities. Neither had a significant impact on participation, although this was to some extent dependent on genre. Where there were differences, seniors tended to be more frequent attendees of TAPA performances.
- Those under 35 years of age were as frequent in their reported attendance as most other age groups. The one group who's attendance is clearly affected by their situation is those with children 18 years of age or under.
- Where age and, to a lesser extent, income did have a significant impact is on membership in arts and cultural organizations and subscriptions. Younger audience members have far less interest than their older counterparts, irrespective of their income.
- spending on arts is, not surprisingly, linked to available income and less to age. Overall, the implication is that younger Toronto audiences are as engaged as their older counterparts - albeit in somewhat different ways – and, in fact, may spend a larger share of their income on arts and cultural participation than those with greater affluence.

Factors Associated with Attendance

Analytical tools

- In addition to the demographic and attitudinal questions that will be used to explore factors influencing attendance, four analytical indexes will be used. One has already been introduced – *a passion for the arts.* How these scales are constructed in described in Appendix A.

- The other three are:
  - Time-stressed;
  - Money-stressed; and
  - Novelty/familiarity seeking.

- The time stress index reveals that on the five point index, 12% of audiences are in the top category or very high time-stressed, and a further 10% appear somewhat time-stressed. Much of the analysis to follow will focus on this group. Demographically, the high time-stressed tend to be younger, especially those under 45 years of age with young families, but household income does not appear to be associated with time-stress.

- The money-stress index is made up of 36% of audiences who are either very money-stressed (18%) or somewhat money-stressed (18%). Not surprisingly, there is a very strong negative correlation between those who are money-stressed and household income. Further, those under 45 years of age are especially likely to be money-stressed. In fact, half of this age group are at least somewhat money stressed. Again, families with young children seem more likely to find identify themselves in this way, (55% are at least somewhat money-stressed), but those under 45 years of age with no children are also somewhat money-stressed (46%).

Factors Associated with Attendance

- The novelty/familiarity index shows that on the five point scale, 35% of audiences are at the top end of the novelty scale, and 26% are at the other end of the scale; familiarity. This index is strongly correlated with age; as age increases, the desire for novelty declines significantly. Among those under 35 years of age, half are on the top half of the scale (novelty-seeking), compared with only 27% among seniors. The implication here is that younger audiences are much more likely to seek new experiences than their older counterparts.
- While this index suggests that different age groups seek different types of experience, it does not show any variation in terms of the number of performances or activities attended.
- The four indexes will be used throughout this section to explore the impact of time, money, novelty and passion for arts and culture on attendance and attitudes.
- In addition, the agree/disagree statements reviewed in the previous section will also be used in the analysis; they will identify the extent to which they inhibit or encourage attendance. These are:
  - Awareness of the arts and cultural activities taking place in Toronto;
  - Trend in the number of performing arts events attended;
  - Quality of arts and cultural activities in Toronto;
  - Ability to afford to attend all desired performing arts;
  - Creativity in the arts; and
  - Taking children.

Factors Associated with Attendance

Perceptions of the impact of cost on attendance

- While demographic factors such as age and household income have a limited impact on actual engagement (as measured by attendance at, or visiting, arts and cultural activities) perceptions tell a somewhat different story. In fact, there is little relationship between perceived cost and attendance.

- Two thirds of audiences believe that cost is a somewhat significant factor (22% say very large) in their decision to attend performances. Not surprisingly, this perception is linked to household income; the higher the income the less of a factor is cost. However, perceptions of costs as a barrier appear are not especially associated with age, except among those under 35, and, to a lesser extent, 35 to 44 years olds. The younger group, had the lowest household incomes, followed by 35 to 44 years olds.

- It may well be that especially those under 35 years with lower incomes do feel constrained by cost, and would attend more, but for the cost of attendance.

- There is some evidence for this point of view. Those who say cost is a factor are the most likely to agree they are going to fewer performances than five years ago, and the most likely to disagree that they can go to all the performances they want. At the same time, this group spends less on arts and cultural activities; only 43% report spending $500 or more a year compared with the average of 64%. Moreover, those who say cost has a very significant impact on their attendance also have the lowest median household incomes ($57,000).

Factors Associated with Attendance

- Those who feel cost has an impact on their engagement with arts and cultural attendance also believe that they are going to fewer performances and that they can't afford to go as many as they would like. This suggests some pent-up demand exists, and that perceived costs are a constraint, especially for younger audiences.

- However, engagement with arts and cultural activities shows that those for whom cost is a constraint nonetheless attend arts and cultural activities frequently; but not as frequently as those for whom cost is not a constraint. This suggests that cost is, to some extent a constraint. The implication here is that, if those with this belief were persuaded instead to believe that arts and cultural activities were more affordable, then this may well lead to a higher level of attendance and or visiting on their part.

Attending Fewer Performances

- A fifth of respondents report that they are attending fewer performances than five years ago, and a further 15% appear unsure.

- While household income and age are linked to the perception of attending fewer performances, they do so in an unusual way. For income, it is those with household incomes of less than $125,000 where the attitudinal shift occurs; 26% agree with this view below $125,00 compared with 15% among those with much higher incomes. And with age, the group most likely to agree is not the youngest, but those aged between 35 and 44 years. Other age groups are similar. It is of particular interest that seniors are no more likely to attend fewer performances, and this suggests that being older does not necessarily lead to a decline in attendance.

Factors Associated with Attendance.

- The large proportion of those 35 to 44 years attending fewer performances is most often due to the presence of young children. In all, 50% of those who strongly agree and 30% who somewhat agree that they are going to fewer performances have children under 13 years of age. However, this does not explain why those outside of this age group, or those with household incomes below $125,000 believe they are going to fewer performances.

- The perception of attending fewer performances is borne out by audiences' self reporting of attendance. Those reporting attending fewer performances do, in fact, also report attending fewer live performances, TAPA related and arts and cultural activities in general, compared with those who disagree with this view.

- The factors associated with this situation do not appear to be attitudinal in terms of an interest or passion for the arts or regarding perceptions of the quality of performances in Toronto. (However, those who strongly disagree that they are going to fewer performances are somewhat more likely score highly on the passion scale, but the differences with the balance of audiences is not great.) Further, to reinforce the cost/income issue, those who agree they are going to fewer performances are also more likely to say that cost is a very large factors influencing their attendance and are less likely than others to agree that they can afford to go to all the performances they would like.

Ability to afford to attend as many performances as desired

- Finally, there is evidence to suggest that audiences would attend more performances if they could afford it. Four-in-ten (44%) TAPA audiences disagree that they can afford to attend all the performing arts events they want. Responses by age and household income both show a very strong and positive relationship. This appears to be especially the case with those under 35 years of age, where 63% disagree, and those with household incomes of less than $40,000, where 73% disagree. However, this view exists to some extent across all age and income groups.

Factors Associated with Attendance

- Despite reporting that they are attending fewer performances than they would like, those expressing this view do nonetheless do participate, although less frequently than those who attend all the performances they want.

- In summary, the evidence suggests that cost is an issue, as it limits participation among those already engaged, as well as those who would like to be engaged even more.

Money and time stress indexes and participation

- When time- and money-stress indices are correlated against frequency of attendance, they do not strongly predict attendance patterns. Being stressed for time does not appear to inhibit, to any great extent, the frequency of attending performances. For example, among those who appear high time-stressed, 34% report attending 10 or more TAPA performances in the last year, while among the least time-stressed, 41% report this level of attendance.

- Being stressed by money, though, does have some impact on attendance. Those who appear to be money-stressed do attend fewer live performances, TAPA performances, and arts and cultural activities in general. But the differences between those who are high or low money-stressed is not as great as might be expected. Among those who are highly money-stressed, 34% report attending 10 or more TAPA performances, compared with 45% among the least money-stressed group.

- There are differences, however, in spending and perceptions of attendance. Those high on the money-stress index are far less likely to spend $500 a year or more on arts and cultural activities and they also attend fewer events compared with five years ago.

Factors Associated with Attendance

- Those high on the money-stress index are also the least likely to be able to afford attending all the cultural activities that they would like. They are also the most likely to agree that they are going to fewer arts and cultural activities than five years ago. Those high on time-stress follow a similar but weaker pattern.

- These findings suggest that being stressed around money will limit what is spent on arts and cultural activities. It may also lead to decreased attendance. While this is difficult to demonstrate (given that attendance among those who are money-stressed is nearly the same as those who are less money-stressed), it may be the case that without this stress they may well have attended more performances. The implication is that a portion of the audience is highly sensitive to the cost of arts and cultural activities, and this may be why attendance at film is so high. It is vital to communicate the message of the affordability of arts and cultural activities.

Perceptions of awareness and quality on attendance

- As noted earlier, most audience members believe they are aware of the arts and cultural activities that take place in the city, and reject the idea that they have very little awareness. It is also clear that those who agree or neither agree or disagree that they have very little awareness of arts and cultural activities in Toronto are consistently the least likely to attend performances. This may be a function of limited interest.

- Those least aware of arts and cultural activity in the City are also the least passionate about arts and culture. The implication is that those who are engaged with arts and culture make an effort to stay aware of what is taking place in the City.

Factors Associated with Attendance

- However, this is not to imply that marketing is not essential. What is implied is that building awareness is a partnership between arts organizations and audiences. The audience must be motivated enough to notice marketing messages and the arts and cultural organizations must communicate using channels used by their audiences.

- Perception of the quality of available arts and culture is both a source of interest and a barrier to attendance. Most agree with the view that arts and cultural activity in Toronto is as good as anywhere in the world. What is of interest is the extent to which perceptions of the quality of arts and cultural activities in the City have an impact on attendance. In fact, perceptions related to this issue are not correlated in any way with patterns of attendance. Those who believe strongly that productions are of world class quality are attending the same number of productions as those who have doubts about the quality of arts and cultural activity in the City.

Life stage

- The proportion of audience members who have children 18 years of age or under is quite small, and well below the average across the City. Those under 45 years of age with children 18 years of age or younger are half as likely to attend performances as their counterparts without children.

- Having children strongly affects attendance. 60% of those under 45 years of age with children 18 years or younger, agreed with this view. This is less the case among older respondents with younger children; only 34% of this age group mainly seek child-friendly activities. The difference may be explained by the fact that older parents are likely to have older children (who can be left either unsupervised for an evening or can be left with a babysitter).

Factors Associated with Attendance

- It is not the case that parents with younger children have less passion for the arts and this is the reason for their non attendance. Among both younger and older parents with children 18 years of age or younger, passion for the arts is consistently high and similar to that of their peers without children in the same age group. The difference is that those with young children are only able to express their passion for arts and culture on an occasional rather than regular basis.

Preferred genre and attendance

- Preferred genre has an impact on participation in the arts and cultural activities. Those preferring opera report the highest level of arts and cultural activity. They are generally less broadly engaged in arts and cultural activities. A similar pattern is also apparent for those preferring plays.

- Music lovers present a very different pattern of attendance; with high engagement with arts and cultural activities in general, but low engagement with TAPA performances. This is likely a function of the music genre being very wide, and the fact that TAPA members do not host music events, per se. At the same time, this group also scores fairly low on the 'passion for the arts' index, suggesting that they relate to arts and culture differently than those preferring other genres. .

- Those whose preference is dance engage with arts and cultural activities overall, as well as with TAPA activities. This group is the least likely to subscribe (probably as a result of their generally younger age and lower household incomes). The implication is that they are very passionate about this genre and that this brings them to many performances. This is, in fact, the case; this group, together with those preferring plays, score highest on the 'passion for the arts' index.

Factors Associated with Attendance

- Those with a preference for musicals, reporting a fairly high level of TAPA attendance are the least engaged with other arts and cultural activities. Part of the explanation for this is that they are also the least passionate about arts and culture.

Passion for the Arts

- A love for, or at least an interest in, arts and culture is presumably a prerequisite for engaging with arts and cultural activities. Those scoring high on the 'passion for the arts' index have much higher attendance at live performances, TAPA performances and arts and cultural activities in general. The higher the passion score, the greater the engagement.

- Those scoring high on the index are more likely to have attended an arts and cultural activity in the last month.

- Scoring high on the 'passion for the arts' index, though, does not necessarily mean that engagement with the arts carries over to a greater likelihood of donating, being a member of, or subscribing to arts and cultural organizations. There is no strong correlation between the index and these activities. In fact, on the six point scale all in the first four categories, which ranges from high to moderate passion, there is no systematic variation.

- The exception is that those in the very highest passion category are far more likely to subscribe (61% compared with an average of 51%).

Factors Associated with Attendance

- Some passion, though, is required to subscribe, be a member or donate. Those in the two lowest passion categories are the least likely to engage in any of these activities.
- Overall, the lack of a strong relationship is likely a factor of generational changes in patterns of engagement through memberships and subscriptions, and, to a lesser extent, donations.
- Spending more than $500 a year on arts and cultural activities is also not linked to the level of passion for the arts. All categories show, more or less, the same proportion spending this amount.
- Although those with a higher passion score attend performances more frequently, this does not necessarily imply more spending, as spending is dependent on the price of tickets.
- Moving on to the softer attitudinal measures and how they affect a passion for arts and culture, there are a number of interesting findings that indicate how the arts are valued, and the potential impact on engagement.
- As noted earlier in his report, TAPA audiences rated both the number and quality of venues, and that of artists and companies in Toronto, as the two most important attributes of the City. However, there are significant differences in how these two attributes are evaluated, based on the level of passion for the arts.

Factors Associated with Attendance

- There is no variation in the importance of venues in making Toronto an attractive place to live. These are important irrespective of the level of passion. However, there are significant variations in the importance assigned to artists and companies by level of passion. The greater the level of passion, the greater the importance assigned to artists and companies in making Toronto an attractive City. The implication is that those with a high level of passion for the arts value the City's artists and companies far more than those with a lower level of passion. This suggests that for those with a lower level of passion, high quality or attractive venues are as, or more, important than what is presented on the stage.

- The lower value assigned to artists and companies by those who are less passionate about arts and culture does not appear to be a function of the quality of arts and culture. In fact, there is no variation by the level of passion in the proportion agreeing that the quality of arts and cultural performances in Toronto is as good as anywhere in the world.

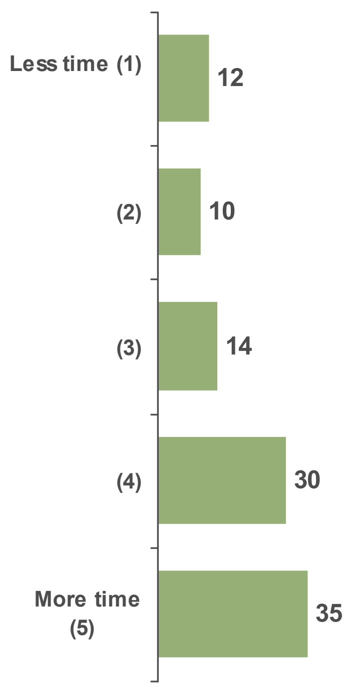
- In terms of attitudes related to the frequency of attending, there is no relationship between the level of passion for the arts and attending fewer performances. Those who are less passionate attend performances less frequently, but the level of passion does not appear to be associated with attending less frequently. This suggests that the level of passion creates an interest that translates into a certain level of engagement that is relatively stable over time.

Factors Associated with Attendance

- As noted earlier, four-in-ten of those responding to the survey disagree that they can usually afford to attend all the performances they want. This suggests that there is considerable demand that is not expressed due to affordability (which could mean both limited income and the perceived affordability of tickets). This is especially the case for those who are most passionate about arts and culture. Among those at the highest level, 57% disagree that they can afford to attend all they want, and 47% disagree at the next level. The implication is that while TAPA member companies have no control over the incomes of their audiences, they do have control of ticket pricing, and especially promotion. Continued and sustained efforts to communicate the affordability of tickets may help to tap into some of this unrealized demand.

- Finally, a passion for the arts is the strongest predictor of attendance found in this research. Unfortunately, not all audience members share the strong passion that drives attendance. The challenge is igniting this passion in a wider audience. If arts and culture is seen simply as an extension of entertainment, then this passion is unlikely to be ignited.

Anxiety Around Time and HH Income and Age

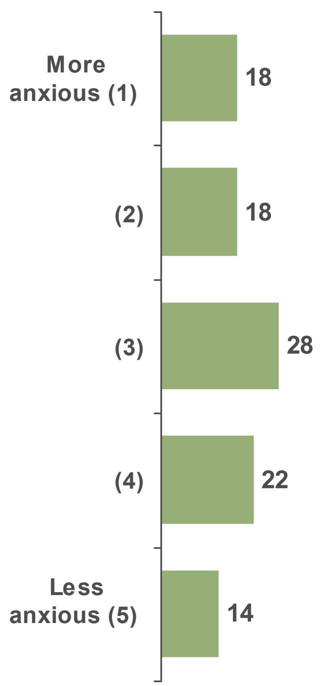


	HH Income				
	<$40K	$40-$80K	$80-$125K	$125-$200K	$200K+
n=	455	717	709	502	313
	%	%	%	%	%
Less time (1)	12	11	13	14	13
(2)	11	10	12	10	10
(3)	19	14	13	15	11
(4)	30	29	27	31	33
More time (5)	28	35	36	31	33

	Age				
	<35	35-44	45-54	55-64	65+
n=					
	%	%	%	%	%
Time-stressed 1	16	24	15	8	3
Time-stressed 2	15	16	13	7	2
Combined 1/2	31	40	27	14	5

Q. Varies
Base: Total sample

Anxiety Around Money and HH Income and Age

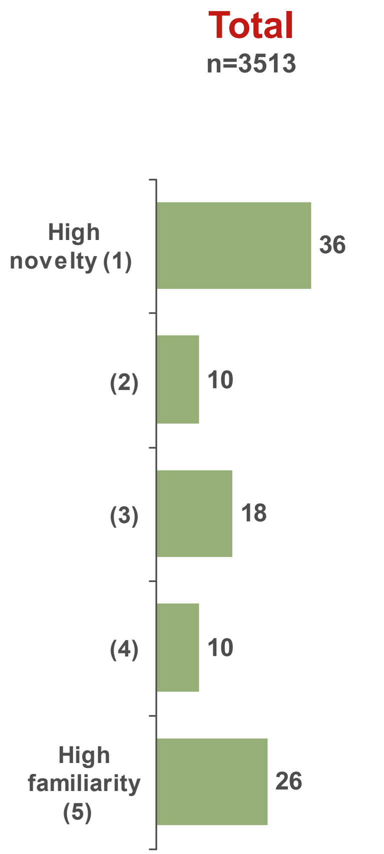


	HH Income				
	<$40K	$40-$80K	$80-$125K	$125-$200K	$200K+
n=	453	714	707	502	311
	%	%	%	%	%
More anxious (1)	38	23	14	8	4
(2)	23	22	20	16	7
(3)	27	28	29	27	21
(4)	10	18	23	29	30
Less anxious (5)	2	8	14	20	38

	Age				
	<35	35-44	45-54	55-64	65+
n=					
	%	%	%	%	%
Money-stressed 1	27	25	15	13	13
Money-stressed 2	22	23	18	15	14
Combined 1/2	49	48	33	28	27

Q. Varies
Base: Total sample

Novelty/Familiarity Index

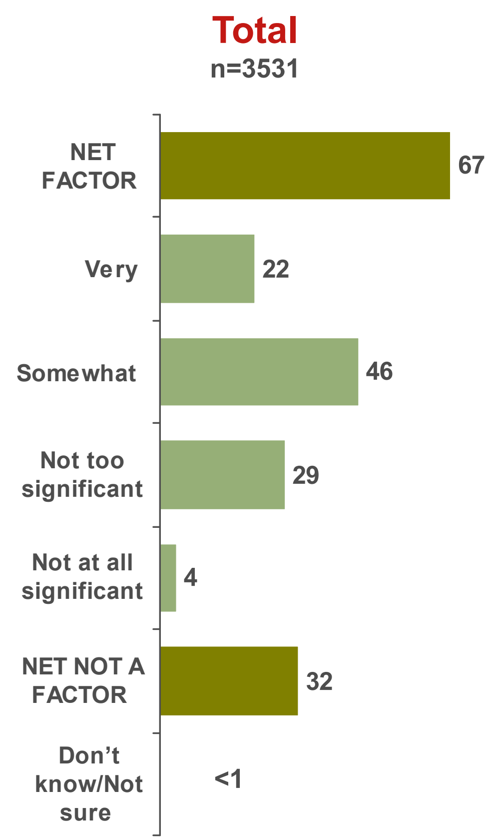


	HH Income				
	<$40K	$40-$80K	$80-$125K	$125-$200K	$200K+
n=	453	714	707	502	311
	%	%	%	%	%
High novelty (1)	62	45	34	25	12
(2)	14	12	12	7	7
(3)	13	16	17	20	14
(4)	6	8	11	12	8
High familiarity (5)	6	19	26	36	59

	Age				
	<35	35-44	45-54	55-64	65+
n=	654	408	634	907	782
	%	%	%	%	%
High novelty	49	48	33	28	27
High familiarity	12	20	28	32	34

Q. Varies
Base: Total sample

Cost as a Factor in Attendance Decision Making with HH Income and Age



	HH Income				
	<$40K	$40-$80K	$80-$125K	$125-$200K	$200K+
n=	455	717	709	502	313
	%	%	%	%	%
NET FACTOR	90	78	66	54	34
Very	47	27	17	12	4
Somewhat	43	51	49	43	30
Not too significant	9	20	32	42	52
Not at all significant	<1	2	2	4	14
NET NOT A FACTOR	10	22	34	46	66
Don't know/Not sure	1	1	-	<1	-

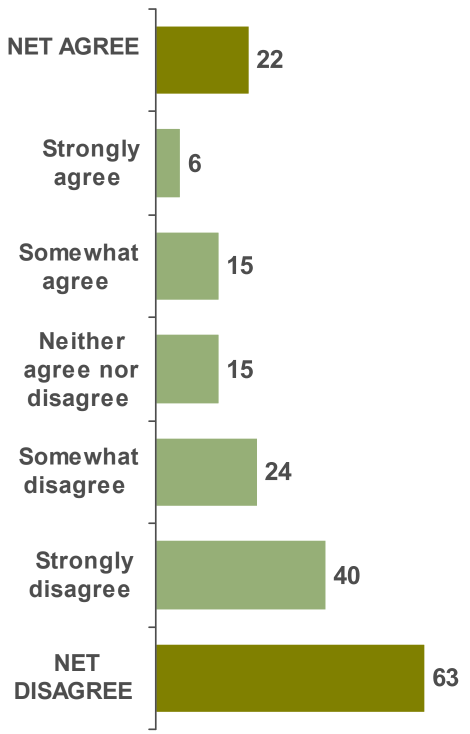
	Age				
	<35	35-44	45-54	55-64	65+
n=	654	488	687	909	793
	%	%	%	%	%
NET FACTOR	86	75	64	61	57
Very	34	25	18	18	16

Q.11 How much of a factor is cost when making a decision about attending a paid arts or cultural activity?
Base: Total sample

The Impact of the Perception of Cost as a Factor Influencing Attendance and Related Attitudes

	Total	Very large	Somewhat large	Not too	Not at all
n=	3531	759	1007	1016	124
	%	%	%	%	%
10+ live performances	50	48	49	53	65
<5 TAPA performances	18	22	19	13	12
10+ TAPA performances	40	37	39	44	44
<15 arts/cultural activities	22	27	22	19	23
25+ arts/cultural activities	36	32	35	41	40
$500+ spent annually	64	43	61	81	92
Attending fewer performances than five years ago (% agree)	21	33	22	14	10
Can afford to attend as many performances as desired (% agree)	48	16	41	78	94
Median income ($1,000)	$88	$57	$84	$121	$184

Trend in Number of Performances Attended (fewer) and HH Income



	HH Income				
	<$40K	$40-$80K	$80-$125K	$125-$200K	$200K+
n=	444	704	702	501	312
	%	%	%	%	%
NET AGREE	28	27	25	16	13
Strongly agree	8	8	7	4	3
Somewhat agree	20	19	17	12	9
Neither agree nor disagree	17	17	16	13	13
Somewhat disagree	16	22	23	26	25
Strongly disagree	39	35	37	45	50
NET DISAGREE	55	57	60	72	75

	Age				
	<35	35-44	45-54	55-64	65+
	%	%	%	%	%
NET AGREE	22	34	22	16	19

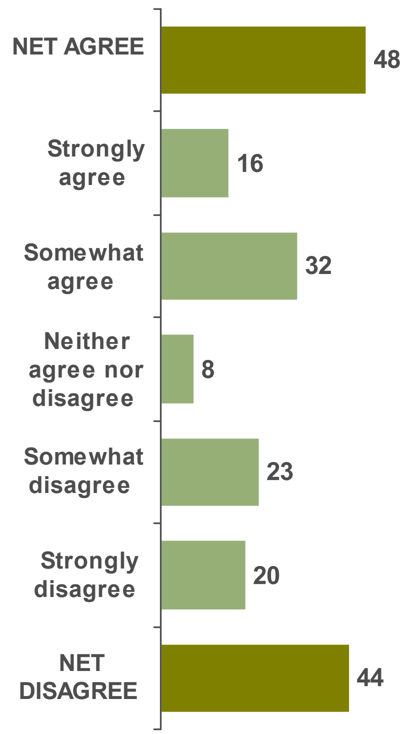
Q.17e Compared with five years ago, I am going to fewer performing arts events.
Base:

The Perception of Attending Fewer Performances than Five Years Ago and Attendance and Related Attitudes

	Total	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
N=	3531	220	529	535	819	1382
	%	%	%	%	%	%
10+ live performances	50	30	39	43	44	64
<5 TAPA performances	33	41	30	21	16	9
10+ TAPA performances	28	23	30	31	36	46
<15 arts/cultural activities	36	45	32	25	23	14
25+ arts/cultural activities	27	23	28	33	33	45
Cost a very large factor in attendance	33	39	30	24	18	16
Quality of arts and culture in Toronto is world class (agree)	73	71	73	70	69	79
Can afford to go attend as many performances as I desire (% agree)	31	30	31	43	49	60
High passion for the arts	32	32	33	29	28	38
Percent spending $500+	46	40	48	57	67	78
Children under 12 years of age	36	50	30	17	15	9

Ability to Afford to Attend all Desired Performing Arts Events and HH Income

Total
n=3531



	HH Income				
	<$40K	$40-$80K	$80-$125K	$125-$200K	$200K+
n=	455	717	709	502	313
	%	%	%	%	%
NET AGREE	20	37	47	63	81
Strongly agree	3	11	15	20	38
Somewhat agree	17	26	32	43	43
Neither agree nor disagree	7	9	9	9	4
Somewhat disagree	30	26	27	20	11
Strongly disagree	42	28	17	8	5
NET DISAGREE	73	54	44	28	16

	Age				
	<35	35-44	45-54	55-64	65+
	%	%	%	%	%
AGREE	28	42	49	54	61
DISAGREE	63	48	43	37	32

Q.17g I can usually afford to go to all the performing arts events I want to see.
Base:

Ability to Afford to Attend as Many Performances as Desired

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
	560	1142	283	823	713
	%	%	%	%	%
10+ live performances	58	52	46	48	45
<5 TAPA-related performances	14	14	19	19	23
10+ TAPA	47	43	38	37	34
<15 arts/cultural activities	22	19	23	23	27
25+ arts/cultural activities	40	38	36	34	31
Cost a very large factor in attendance	5	8	14	25	55
Going to fewer performances (% agree)	15	13	20	25	36
Percent spending $500	83	74	62	58	43

Time- and Money-Stress and Key Arts/Cultural Activity Measures

	Time Stress					Money Stress				
	High	2	3	4	Low	High	2	3	4	Low
	403	343	479	1064	1328	614	638	992	767	501
	%	%	%	%	%	%	%	%	%	%
10+ live performances	48	50	50	56	47	45	47	52	53	54
TAPA10+ events	34	36	33	45	41	34	37	42	41	45
General 15+ events	32	34	33	41	36	31	35	37	40	38
Spend $500 or more	55	54	61	67	69	40	54	67	74	84
Attending fewer events (agree)	38	30	22	18	17	45	30	16	12	9
Can afford to attend as many performances as desired (agree)	38	39	40	51	55	18	32	48	62	84

Q.
Base:

Perceptions of Awareness and Quality of Arts/Cultural Activities and of Quality and Impact on Attendance

	Little Awareness of what takes Place in Toronto			World Class Quality of Arts/Cultural Performances in TO			
	Agree/Neither	Somewhat disagree	Strongly disagree	Strongly agree	Somewhat agree	Neither	Disagree
n=	506	1104	1908	1232	1354	356	502
	%	%	%	%	%	%	%
TAPA							
<5	32	22	11	14	19	21	19
10+	21	30	50	42	40	37	39
Arts/Cultural Activities							
<15	44	28	14	21	22	27	20
25+	19	27	47	38	34	40	38
≤ 3 live performances	24	15	6	10	15	16	15
10+ live performances	24	41	62	54	49	46	50
Passion High 1	7	12	24	18	17	19	21
Passion High 1/2	16	24	41	33	31	31	36

Life Stage and Attendance

	<45 without kids	<45 with kids	45-64 without kids	45+ with kids	65+ without kids
n=	928	214	1334	263	792
	%	%	%	%	%
TAPA					
<5	21	38	16	24	8
10+	36	17	40	29	55
Arts/Cultural Activities					
<15	23	42	22	24	17
25+	36	19	37	32	42
10+ live performances	53	31	50	42	57
<3 live performances	18	33	10	18	9
Passion 1	23	17	16	21	17
Passion 2	39	37	28	33	30
When go out, usually seek activities with my kids (Agree)	-	60	-	34	-

Number of Activities/Performances Attended by Most Preferred Performing Art and Difference Between Number of all Arts/Cultural Activities Attended and TAPA Performances

	Most Preferred Performing Art					
	Total	Plays	Musicals	Dance	Music	Opera
n=	3531	1759	632	334	624	182
	%	%	%	%	%	%
10+ live performances	50	53	43	53	45	62
15+ All activities	72	80	66	78	80	83
30+ All activities	21	22	13	25	24	19
10+ TAPA Performances	40	41	39	45	28	60
15+ TAPA Performances	12	12	11	16	8	22
Membership in arts/cultural organization	46	50	30	46	47	66
Donate to arts/cultural organization (among donors)	61	63	46	63	58	77
Passion for the arts (highest level)	18	24	8	22	13	16
Passion for the arts (top two levels)	32	40	14	39	26	32

Q.
Base:

Passion for the Arts Index and Key Indicators

	Total	Passion for the Arts: High 1	2	3	4	5	Low 6
n=	3531	647	490	539	624	518	713
	%	%	%	%	%	%	%
10+ live performances	50	71	58	57	47	38	34
10+ TAPA Performances	40	56	47	44	39	32	25
25+ Arts/Cultural Activities	36	53	40	40	34	26	22
Attended arts/cultural activity in last month	83	93	91	88	82	75	70
Subscribe	51	61	39	52	47	45	44
Member of arts/culture organization	46	50	51	47	50	41	37
$500 + Spent	64	66	63	65	66	61	64
Rate as important the Number and quality of Performing Arts Venues in Toronto	54	56	54	58	55	52	50
Rate as important the number and quality of Artists/companies in Toronto	49	64	56	52	48	44	34
Difference in percent between importance of venues and artists in Toronto	-3	+8	+2	-6	-7	-8	-16
Donate to arts/culture	52	63	61	60	55	43	35
Limited awareness of arts/cultural activities in Toronto (Agree)	14	6	10	12	15	17	25
Attending fewer performances compared to five years ago (Agree)	22	21	24	21	24	20	19
Quality of arts/culture in Toronto is world class (Strongly agree)	36	35	38	38	41	34	29
Usually afford to attend all arts activities I desire (Disagree)	44	57	47	41	41	36	38

Q.
Base:

Appendix A

Methodological Notes on the Scales Developed for the Analysis

Overall

- In all, six scales or indexes were created for this research.
  - Two were attendance based;
  - Two deal with stress: time and money;
  - One deals with personal; experience and measures the level of passion for the arts; and
  - One deal with the spectrum from seeking the new to the seeking the familiar
- Each index is additive and combined a score for each response to the questions used in constructing the scale.

Attendance scales

- Each index was constructed by adding together the total number of times respondents reported attending an activity. In the case of those reporting six or more times, they were simply assigned a score of six. This will likely underestimate the number of activities attended (especially in terms of plays), but what is achieved is a score for each respondent. This allows each to be categorized in terms of their overall frequency of attendance. The various frequency of attendance categories can then be analyzed in terms of what factors are most associated with high or low attendance.

Methodological Notes on the Scales Developed for the Analysis

- In the case of the performing arts genres TAPA members companies represent, the scale developed has five categories and runs from a category of five or less performances attended in the last year to 15 or more performances attended.

- When this index was tested against the number of overall performances respondents estimated they attended in 2012, the relationship between the two scales is very high. Those scoring high on the index also reported high levels of overall attendance and vice versa.

- The second index consists of all 11 activities and the same procedure was used, as described above, to create this index. In this case, because there are more genres, the scale, while having five categories, runs from less than 15 attendances/visits to 30 or more.

Time and money stress and novelty/familiarity Scales

- These indexes are each made up of two agree/disagree statements, and responses to the two questions have been added together to make each index. The response categories have five values, and for each respondent their answers are added together to provide a score. The scores have then been grouped into five categories.

- The time stress index is based on:
  - ***I have a lot more time now to do the things I really like to do; and***
  - ***There never seems to be enough hours in the day.***

Methodological Notes on the Scales Developed for the Analysis

- The money-stress index is based on:
  - *I feel a lot more anxious about money than I used to; and*
  - *I have a lot less money to spend on luxuries than I used to.*

- The novelty/familiarity index is based on:
  - *I am always on the lookout for new things to do;*
  - *I get a lot of pleasure from doing things or going places with which I am familiar*

Feelings toward arts and cultural activities and meaning attributed to them

- Three statements were used to assess overall responsiveness to arts and cultural activities. These are:
  - *Some of the most meaningful experiences of my life have been when watching a performance of some kind;*
  - *The performing arts can transform lives; and*
  - *When I go out to attend a performing arts event, I simply want to relax and be entertained.*