



# Spotlight on Arts Audiences

Wave 5: June 2025

Qualitative Outcomes

# Thank you to our generous partners

This initiative is being funded by arts funders who are keen to use data to drive engagement and growth strategies across Alberta.

**We thank them for their generous support.**



# Table of contents

4	Purpose and objectives
5	Research approach
6	Key Findings
8	Story on One Page
9	Detailed Findings
17	Considerations for Advertising and Marketing

# A collaborative and evolving resource

## The purpose of this work:

This work was developed exclusively for the arts sector to help arts organizations understand the market and their audiences. It builds upon research that began in 2020 but is designed to provide specific, relevant, and reliable facts to support the leaders in the arts sector as they build relevance and grow attendance.

## Where we are today:

In four waves of work so far, this research has explored audience motivations, interests, habits and perceptions of arts experiences using a quantitative methodology. In this wave of work, we shifted from a survey-based approach to a qualitative methodology as there was an emerging need to explore the “why” behind what people are engaging with and capture a deeper understanding of what matters to them when considering different experience options. Qualitative exploration also provides the ability to gauge areas of curiosity that have emerged in earlier phases of work.

## Key topic areas for Wave 5:

- What experiences are enjoyed among the Passive audience today and what makes them appealing?
- What barriers exist, preventing participants from experiencing the arts more often?
- What marketing concepts are most effective in capturing attention; what are least effective?

# Research Approach

**This report represents the fifth of six (6) waves of work.**

Instead of a survey, a series of focus groups (mix of in-person and online) were conducted.

The groups were conducted exclusively with those Albertans who are passively engaged with arts experiences (51% of the province, from here out referred to as “Passives”). This segment of the market can be a difficult group to attract but offers significant potential for growing audiences for the arts. Focusing on them offers insights into how organizations can better inspire their attendance.

**The focus group composition was as follows:**

- 2 groups with Edmontonians - hosted in person
- 2 groups with Calgarians - hosted in person
- 2 groups with Albertans in South, Central or North regions - hosted virtually
- Each focus group session was 1 ½ to 2 hours in length. In this time, a series of creative techniques were employed to explore the key topics of our project objectives.
- The groups were conducted between June 3 - June 5, 2025



# Key Findings



# A reminder of what we've learned so far

For this wave of work, we focused specifically on the Passive audience. Here is what we have learned about this group so far after four waves of quantitative research:

- 1. Not everyone engages to the same degree.** We know the arts already attract audiences who are deeply engaged or immersed. While creating new arts enthusiasts is always the ideal, it was never the main goal for this research. Instead, understanding and inspiring more connections with the 51% who are passively engaged is key to growing audience reach.
- 2. Competition is fierce.** Lack of time and money are both basic considerations for ALL audiences but take on particular weight for the Passive audience, who is already less connected to the arts. In order to break through, an experience must show value and be relevant.
- 3. The Passive audience is unique** when compared to the Immersed and Engaged arts audiences:
  - They are less likely to perceive arts experiences as offering something that cannot be achieved through other hobbies or recreational activities (they are passive in the arts engagement but typically very engaged in a variety of other activities).
  - They are less likely to indicate that arts experiences make their lives richer.
  - They are more likely to take in a show if it something that is well-known (like pop-culture) instead of "high arts."
- 4. Passives audiences are there for more than the artistic offering.** Reaching and inspiring them is already difficult but it is just as critically important to review the ENTIRE experience from early stages of planning to going home afterwards and identify any features that inhibit their motivations and strive to address them.

# What did we learn in this wave of work?

## 1 The Passive audience is a large and diverse group, meaning their needs and requirements are also diverse.

This group ranges from arts rejectors to those cautiously curious. It encompasses people from different backgrounds with different interests. What they have in common is less familiarity with the arts as a whole, but a desire to spend time with friends/family and be entertained.

## 3 Passives need to “see themselves in the experience” in a very practical way.

This is a group that gravitates to the familiar (familiar works but also familiar venues and art forms) because it is comfortable and they are less likely to feel out of place. They are open to try something new but not if they feel there is a big risk of disappointment.

Focusing on practical elements like what, where, when, how helps ease any discomfort they might have.

## 2 Passives are generally “passengers” in the decision-making process.

This group is rarely the driving force in decision making. They tend to rely on the recommendations or even invitations of others. Their inspiration comes from those in their circles (“the drivers”) versus hearing from the arts organizations directly. They are rarely adventurous enough on their own to try art forms they don’t know.

## 4 Advertising has an important role, but less to inspire, more to provide clarity on an experience.

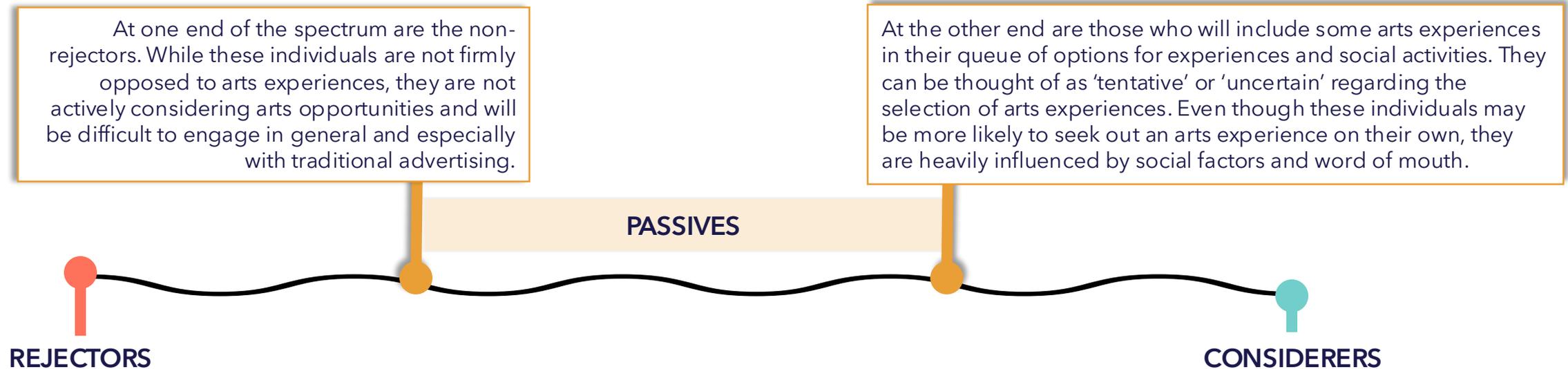
Passives’ generally lack context or a frame of reference to evaluate ads deeply. As such, they don’t react to provocative or emotional ads as others might. Instead, they use ads to get hints on what the experience will offer and react accordingly.



# Detailed findings

## At 51% of the Alberta population, Passives are a large segment that exist in the space between 'Rejectors' and 'Considerers.'

We have already learned that Passives are the largest segment of the art going population in Alberta – a group that is open to arts experiences but not overly engaged or familiar today. Not surprising, given their size, there is considerable variation within this segment of the population, and understanding some of the nuances within this group is important.



**So what?** It is a good reminder that while profiling audiences by engagement is a useful starting point, but there are so many factors that influence personal choices. There is the person and their personality to consider, location (and offerings available), and general preferences. The engagement lens can only take us so far – arts organizations then need to layer in other factors to truly understand this audience.

## Passive audience members are generally ‘passengers’ in the arts experience.

Given what we already know about their lack of familiarity with the arts overall, it is perhaps not surprising that Passives are unlikely to actively seek out an arts experience themselves. Instead, they accompany a friend or family member who takes the lead in recommending options or purchasing tickets.

*“My wife buys the tickets and tells me what we are going to see.”*

*“I have my ‘cultured friend.’ She is the one who sees what is going on and makes suggestions for things she thinks I will like.”*

Passives who *do* seek out a specific art experience, or take the lead in purchasing tickets, are still heavily influenced by social factors and word of mouth referrals. The decision to purchase tickets is well considered, versus a quick choice.

*“After 3 years of watching it come through town, I decided to buy tickets.”*

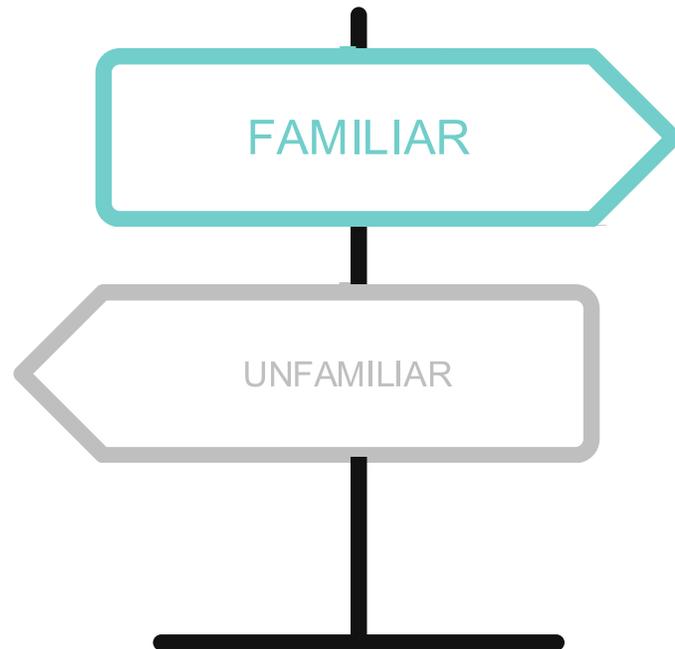
Passives’ lack of experience in the arts space is sometimes an attendance barrier on its own. They don’t know what to expect in terms of the art experience itself, nor do they know what to expect from the event:



There are a lot of uncertainties to address. More than anything, this group wants to know what they are walking into. It is a more basic tenet than just “not understanding the art,” they want to feel like they fit in.

## Passives are open to new experiences but need more reassurance than other audiences.

Previous waves of quantitative research have indicated that Passives want an emotional experience and something new and novel. When further explored in the group discussions, this was often expressed in terms of being reassured “the event is going to be worth their time.”



While Passives indicate they are open to trying new experiences, they are cautious about what they attend. They want to make sure the experience is “worth it,” and they do not want to be disappointed. As a result, the range of experiences they are open to as part of “trying something new” is narrow. For example, a respondent was open to going to a play (for the first time) of ‘The Davinci Code’ because they had read the book and seen the movie, “so I knew I liked the story.” There is comfort and ease in something familiar that helps reassure this audience.

They are most open to events that align with their existing interests and comfort zones. Research participants tell us they prefer to stick to art forms they already know they like, and they rarely venture into unfamiliar territory on their own.

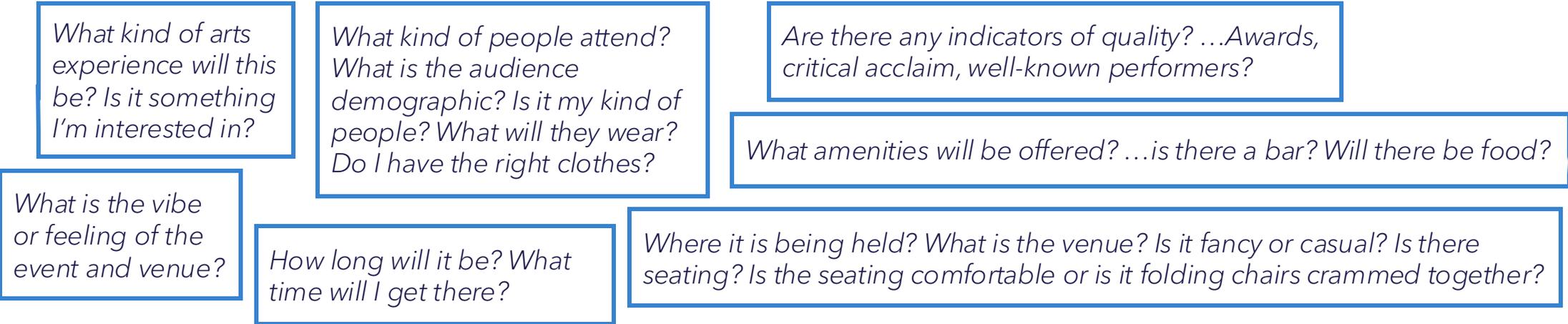
# What makes up reassurance? Entertainment value and personal comfort are key.

During the focus groups, when asked about the kind of arts events they are interested in and likely to attend, Passives indicate they are looking for opportunities where they will be **"entertained," "comfortable,"** and **"won't be disappointed."** This is often explained in terms of wanting to be able to "see themselves having a good time" at the event and ensuring they will "fit in."

Familiar works or adaptations (e.g., movie-based shows, Christmas Carol) tend to be appealing to this audience, as are high calibre acts/performers which reassure them of the quality of the experience. They are drawn to promotional materials that have names of plays, composers, actors, artists or musicians they recognize. Familiarity provides reassurance to the prospective ticket buyers, even if they only have a limited knowledge of the specific art example.

*"I get what this is about. I don't know what Eroica is, but I know what to expect from Beethoven. I know this will be a serious concert."*

**Reassurance of a good time** for this audiences comes from knowing what to **expect** from the event:



## Passives often lack a frame of reference or context to engage with arts advertising in a meaningful way.

This is very much because of their lack of experience and familiarity with the arts. Traditional advertising does not capture their attention nor appear to generate significant interest in arts events because the images and copy is not relevant or familiar.

Early phases of this research focused on the need to “inspire” the Passive audience but recognized this was hard to do.

Further exploration revealed that the **inspiration piece is still important** but **rarely occurs from advertising alone**. This group is inspired by those around them - word of mouth, friends or family that are more engaged in the arts, etc. Their goal is to get out and fill their (limited) time with something entertaining and typically to enjoy with others.

*“These (ads) are just a bunch of noise. I don’t know what most of them are even promoting.”*

As such, the advertising is more important to this audience in terms of **providing information and reassurance about what they are going to engage in**.

They are quick to dismiss or move past advertising promoting unfamiliar art forms because they don’t have the context or experience to evaluate what they are being shown.



# Traditional advertising has a role, but Passives tend to look to online sources to help them assess art experiences.

Traditional advertising appears to be less important for this audience. Passives tend to be heavily influenced by others on what to attend and much less influenced by advertising overall (in the consideration phase).

Passives like to do research about what they have been invited to or what their friends and colleagues are talking about to help them feel more reassured about the event, especially if it is less familiar to them. They are looking for more detailed information than what is often included in ads.



**Word of mouth:** What are people talking about? Are people enjoying and recommending the experience?



**Event website:** Where is there a summary or overview of the event? Including images or videos to get a sense of what they will experience is important. For example, Passives would like to see some of the art being displayed, pictures from the exhibit, recording of the performance. They also expect venue and amenity information on the website.



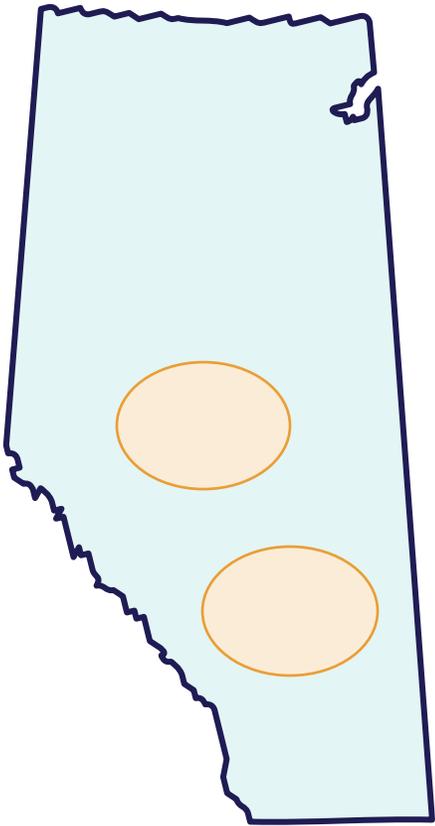
**Reviews:** What are people saying? Passives will look on the event website or social media. Similar to word of mouth, Passives want to hear what others think about the event.



**Hashtag searches / #NameOfEvent:** What pictures are others posting? This search is done to understand the vibe of the experience. What do the attendees look like? What are they wearing? Are there short videos of the production?

# What about urban vs. rural audiences?

Passive audiences share many similarities in terms of their attitudes towards arts experiences. However, these audiences also have some unique attributes to consider.



## Rural audiences:

- Have fewer local art events opportunities
- Face additional cost and time barriers to attending larger productions (e.g., several hour travel time, costs for an overnight and the related organizational issues like childcare and booking time off work).
- More accepting of varying production quality levels and less need for the event “to be worth my time.” Sometimes this is because they have a personal stake in the production, “My granddaughter is in that play.”
- Reasons for attending reach beyond personal enjoyment and entertainment. Rural respondents indicate that they attend arts activities and events in order to support the community generally and to support friends and family members specifically who are involved with the event or show.

## Urban audiences:

- Tend to be more concerned about the event being entertaining or worth their time.
- Have more concerns about getting to the event: navigating downtown areas, finding parking, concerns about safety of the area.
- Because they have more options, there is less urgency or novelty to attend any one production or event (if I don’t go to this play, there are lots of other options now and in the future) and there can be decision paralysis (too many options to choose from).

# Considerations for Advertising and Marketing



# *How to consider advertising for Passives?*

As part of the focus group discussion, research participants were shown a selection of advertising and promotional pieces for arts events in Alberta.

This was done to stimulate a discussion to uncover what attracts the Passive audience member's attention and what is less compelling.

*It is **NOT** meant to be an assessment of advertising for arts events. These findings should not be assumed to reflect the needs of the Engaged or Immersed audiences.*

# Passives have different needs than Immersed audiences in advertising messages

For the Passive audience, there is a strong preference for advertising that provides clear information about the experience, reassuring the viewer this is something they will be interested in, and they will be comfortable going to.

Because the Passives are rarely the “drivers” in arts experiences, they don’t often seek the same level of inspiration from advertising. They tend to rely on friends and family members to take the lead in recommending options or purchasing tickets, and as such advertising to generate awareness or inspire attendance may be less important for this audience. They do need to be inspired, but that often comes from other sources. In advertising, they need clarity on the experience.

Passives are drawn to advertisements that provide clear and easily digestible information that tells the viewer what they can expect. For them, advertising is less about generating **awareness** of an event, and more on providing **clarity** on the experience. They show preference for the following:

## Familiar Names

Such as Da Vinci Code, Candlelight Bridgerton, Legally Blond, Beethoven

## Visuals

Showing the venue, audience, and/or overall atmosphere and feeling, giving the viewer a sense of the vibe of the experience.

## Clear Communication

To understand the type of experience offered.

## Direct Messaging

Clear and easy to read and understand, such as simple fonts, straightforward imagery, etc.

# Perceptions of ad quality may impact perceptions of the experience

Overall, focus group participants can be critical of the quality and professionalism of the ads they were shown. They compare the ads to what they see promoting big budget or for-profit productions. Consequently, the ads for local arts events are sometimes considered to be of lesser quality, which can imply to some that the experience will be of lesser quality. This isn't a universal sentiment but something for organizations to be mindful of as many are already resource strapped.

*"This looks like a straight to streaming movie... totally a b-list production."*

*"It doesn't reflect the quality and effort put into the show. Makes me think the production is also low budget."*

## So, what does matter to the Passive audience?

- 1 Clarity of art form:** Do I know what this is all about? Is it clear what I will be attending?
- 2 Communicating the "vibe":** Do I get a good feel for the atmosphere and what people will be wearing, etc.?
- 3 Clear imagery:** Aside from clarity of art form, do the images shown tell me more about the show or event? Are they appealing to me?
- 4 Familiarity:** Do I know this show or event? Is there something there that I know I will like or at least have some knowledge of so I don't feel out of place?

# What materials attract the Passive audience eye?

## Clarity of art form

*"I never skip an opportunity to see Beethoven's 3rd symphony."*

"I understand what this is."

"Nice simple aesthetic."



# What materials attract the Passive audience eye?

## Communicates the "vibe"

"I have wanted to see something there (Badlands Amphitheatre). I saw the stage years ago and think it would be an amazing place to see something... anything really. It would be an amazing experience outdoors in the badlands."

"I can see it is going to be a passionate ballet."



"Colours drew me in. Very romantic."



"I see these ads a lot on Instagram. It looks like a nice date night kind of thing. The vibe is appealing."

Very dramatic... lusty!"

"It won't be boring ... swords, lightning, and eye-patch... it speaks to me"

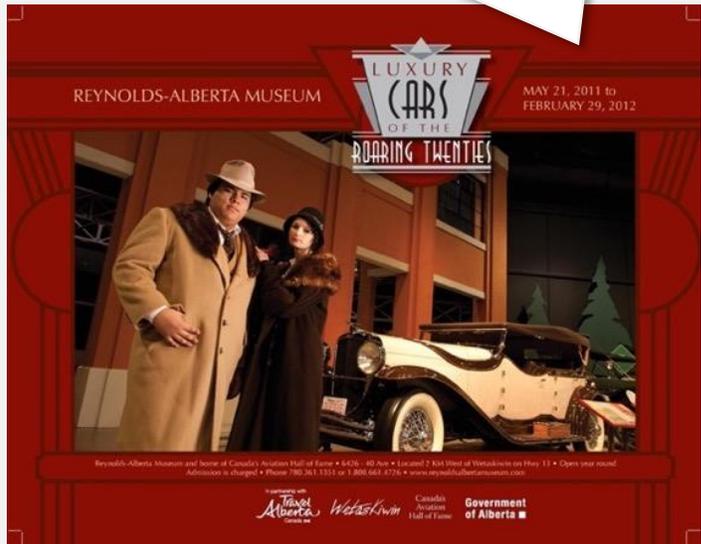


"I don't know who these guys are, but from the pictures... what they are wearing... I know it is going to be some good 'ole hillbilly music."

# What materials attract the Passive audience eye?

## The imagery tells a story

*"This definitely catches my eye. It is an interesting picture... I really like old cars... feels like this will be about gangsters. I would look into this a bit more."*



The picture of the three actors/characters quickly communicates to the viewer that the story will include a transgender character or person in drag. While this topic is divisive and is appealing for some, and less engaging for others, the imagery helps the viewer decide quickly if this is a play they would be interested in.

*"I can see from the picture that this is going to be about transgender ... and that tells me the audience is going to be more open and accepting. There won't be any transphobes in the audience. That is interesting to me."*



## What materials attract the Passive audience eye?

### Familiar with story or production

*"I know The DaVinci Code. I know the story and that makes it more appealing. It is a fun story."*



*"I am a huge Bridgerton fan, and the music is a real part of the show the way they turn popular, modern music into these covers done by an orchestra. I think even know what they will play."*

# What material is **less engaging** for the Passive audience?

## Lack of clarity



This advertisement is frustrating for the Passive audience. It is unclear what is being promoted, and viewers are angered that they don't understand the message.

*"The image relays nothing!"*

*"Looks like a horror movie."*

*"I have trouble reading what it says, and then when I figure it out, I don't know what it means."*

## Disconnect between image & event



*This is a beautiful image. I would buy it if it was on a t-shirt, but I have no idea what this is for. Even after you told us it was for a museum exhibit - I have no idea what I would be seeing "*

# What material is less engaging for the Passive audience?

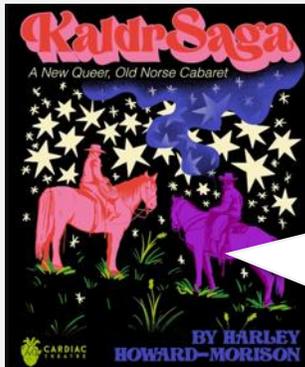
## Difficult to interpret

While the image used in this ad is received positively by Passive audiences, there is significant frustration expressed for the name and font of the play. The use of an unfamiliar indigenous word, together with a difficult to read font, is a barrier to many.



*"I have no idea what this says. It frustrated me and I just moved on."*

*"My brain cannot digest this."*



*"It is colourful, so I did look at it initially, but I have no idea what is going on. The name doesn't mean anything, I don't know what a cabaret is, what do the pictures represent?"*

## Quality of the ad undervalues the quality of the experience



*"I thought this was for a low budget film."*

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**Questions or Comments?**

Please contact: [sandra@stone-Olafson.com](mailto:sandra@stone-Olafson.com)

[mathew@stone-olafson.com](mailto:mathew@stone-olafson.com)

[kim@stone-olafson.com](mailto:kim@stone-olafson.com)

[jason@stone-olafson.com](mailto:jason@stone-olafson.com)