



MANITOBA ARTS ENGAGEMENT SURVEY

MARCH 2020



PROBE RESEARCH INC.

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KEY INSIGHTS

- Despite potentially hard times ahead for Manitoba’s cultural organizations and artists, the findings of this survey reveal a solid foundation of support and engagement on which to rebuild. Overall, there is a very high level of familiarity and exposure to arts and culture among Manitobans. For example, more than six-in-ten say the arts are a big part of their identity, with Manitobans also clearly identifying the positive social benefits these activities provide.
- There are broad pathways to increased arts engagement as well as more practical and sector-specific ones. Broadly, the ability to connect and socialize with friends and family is a key driver of attendance, as is the simple pleasure of having someone to go with. These could become key messages used as part of a broader engagement campaign.
- More specifically, there appear to be some potential pathways to increased engagement. For example, a significant proportion of Manitobans – especially lower-income, Indigenous and newer Canadians – attend community and cultural dance performances. These activities offer a potential route to attendance at paid, professional performances at the Royal Winnipeg Ballet, for example. Similarly, the significant market penetration of Rainbow Stage could provide an entry point to attendance at other professional theatre productions.
- However, there are at least two warning signals in these findings. First, roughly two-thirds of arts-goers say they are now attending cultural events less often than they were two years ago. Second, four-in-ten Manitobans say they do not feel comfortable at arts events and do not see themselves or their lives reflected on stage, in visual art or in other cultural products. These findings speak to the need for arts and cultural organizations to continually work to engage those for whom paid, professional arts and cultural experiences are not part of their ritual – finding ways to meet them where they are and to provide experiences that resonate with them.

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KEY INSIGHTS

SEGMENTATION

- A psychographic segmentation places Manitobans into one of five categories when it comes to their attitudes towards arts and culture: Cultural Champions, Emerging Explorers, Critical Onlookers, Sociable Conformists and Disinclined. These segments are used to illustrate the attitudes, needs and preferences of different groups of Manitobans from a marketing and communications perspective.
- To increase the level of engagement and participation among those who are currently less inclined to attend these activities, MFTA may wish to think of a “ladder” analogy for broadening and deepening engagement among a wider swath of Manitobans. The segmentation solution helps visualize this:
 - Cultural Champions are at the top of the ladder. They are already highly engaged and there is little to be gained through additional efforts to encourage them to attend more often. Instead, their role should be to activate others by encouraging them to take part in cultural activities, by being a guide or ambassador to the arts and by dialing up their vocal support.
 - The other two segments that are potential “opportunity groups” are Emerging Explorers and Sociable Conformists. Moving some of these members up the ladder to Cultural Champions ought to be the goal.
 - Emerging Explorers are already highly engaged in the arts but are highly likely to stop short of paying to attend events or becoming more engaged. This is a young, diverse and connected group of Manitobans who represent a strong opportunity for arts organizations to mold a new generation of patrons, volunteers and donors.
 - Although Sociable Conformists appear to be less inclined to participate in some activities, they are more likely to attend when with others – and more likely to seek opportunities to socialize. This makes them prime candidates to be activated to a deeper level of engagement. Through connections with those who are more inclined to take part in the arts and culture – and who make participation in these activities part of their overall “ritual” – Sociable Conformists may become engaged on a more frequent basis.
 - The remaining two segments, meanwhile, can be set aside, as efforts to engage these individuals are not likely to prove worthwhile.

NEXT STEPS

- Given the recent and potentially extended shutdown of most cultural offerings in Manitoba, there is likely a heightened degree of urgency for Manitobans for the Arts to use this data as a catalyst for a broad awareness and public activation campaign. Indeed this may be an ideal time to plan such an evidence-based effort. This could include a public communication strategy, but also a roadmap to engage member organizations as activating forces and messengers each with their own considerable reach.
- Moving forward, MFTA should seek to gain a deeper understanding of the underlying motivators, attitudes and values of Emerging Explorers and Sociable Conformists. These are the two key audience segments we would recommend targeting for focus groups. Specifically, we recommend conducting two combined sessions with these two opportunity groups (one in Winnipeg and one in rural/northern Manitoba).
 - As well, we would recommend one session with Cultural Champions to better understand their openness to activating friends and family members and the mechanisms that may work best. (Due to the COVID-19 outbreak, we should determine whether to conduct all three sessions remotely, or to postpone the groups until health protocols allow.)
- Given the depth and breadth of the data gathered – of which the following report is only an overview – we also recommend conducting significant outreach and data-sharing with member arts and cultural groups. For example, we have surprisingly robust market data on cultural groups as diverse as the Western Canadian Aviation Museum and the Manitoba Theatre for Young people that could be of use in messaging, targeted marketing and benchmarking awareness and reach. This may be of particular and timely use as arts groups grapple with potentially dire financial situations. While a larger, more strategic awareness and engagement campaign is underway by MFTA, member organizations can also make immediate use of the data we have gathered to increase ticket sales, visits and audience engagement.

ABOUT PROBE RESEARCH

Probe Research is a leading public opinion and market research firm. Founded in 1994, Probe Research provides insights to Fortune 500 companies, provincial and federal government departments and agencies, municipal governments, member and professional associations and not-for-profit organizations.

Vision: We create knowledge by helping citizens, consumers and stakeholders better understand one another and the world around them.

Mission: We ask the questions and find the answers. We use both proven and emerging market research techniques to gather data and distill stories to reveal what truly matters. We help our clients use this knowledge to make smarter, better decisions.

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METHODOLOGY

- Probe Research was commissioned by Manitobans for the Arts (MFTA) to conduct a survey of adult Manitoba residents regarding their attitudes, perceptions and participation in artistic and cultural activities.
- The survey was conducted online using Probe Research's online panel as well as a national online panel provider. A sample of 1,200 Manitoba adults aged 18+ were surveyed between Feb. 14 and 29, 2020.
- Because an online panel is a non-probabilistic population, no statistical margin of error can be ascribed. For the purposes of comparison, the margin of error for a probabilistic sample of N=1,200 is +/- 2.8 per cent, 19 times out of 20.
- Bullet points highlighting variables of note are considered statistically significant within the sample, e.g. "women (55%)".
- Minor statistical weighting by gender, age and region was applied to ensure the final sample reflects the known characteristics of Manitoba's population (based on 2016 Census data).
- Some percentages in this report may not add to 100% due to rounding. Results of 3% or less are also not shown in some graphs due to space limitations.

SEGMENTATION RESULTS



MEET THE SEGMENTS

CULTURAL CHAMPIONS



EMERGING EXPLORERS



CRITICAL ONLOOKERS



SOCIABLE CONFORMISTS



DISENGAGED



39%

12%

16%

18%

15%

Highly engaged and strong advocates for Manitoba's arts and culture scene.

Young, diverse and online. Interested in the arts and culture but wanting to engage on their own terms.

Less engaged than other segments. Risk-averse and likely to simply seek entertainment from offerings.

Not inclined towards the arts as a rule but may become engaged if someone gives them a nudge.

Unlikely to engage and disinclined to participate in any arts and cultural activities.

CULTURAL CHAMPIONS



Highly engaged in the arts and likely to continue attending events in the future, Cultural Champions are strong advocates for Manitoba's cultural scene.



Demographics:

- More likely to live in Winnipeg, especially in the Core and southwest
- Skews female (66%)
- Skews older (35% are 55+)
- Higher education (69% with at least one degree)
- Least diverse (90% are non-Indigenous)

Attitudes/Perspectives:

- Most likely to strongly agree with statements about the value of the arts and what they provide to the community
- Arts and culture are a strong part of their identity
- Highly likely to have a childhood connection to the arts and culture
- Most willing to take a risk on something new/unexpected

Participation in Arts/Culture:

- Most likely of all segments to be frequent attendees (75% have done 6+ activities in the past year)
- Also likely to engage with arts/culture while travelling
- Very likely to purchase tickets and subscriptions/memberships; higher likelihood of donating and volunteering

Barriers and Motivations:

- Most "high-minded" in reasons for engaging (to support organizations, to experience high-quality arts and culture)
- Least likely to identify any barriers to attendance
- Most likely to be motivated by recommendations from others and reviews

Awareness/Communications:

- Most likely to be very aware of artistic and cultural activities
- Most likely to learn about activities via:
 - Word of mouth
 - Newspaper
 - Websites
- Most likely to prefer getting information from Facebook, print and radio

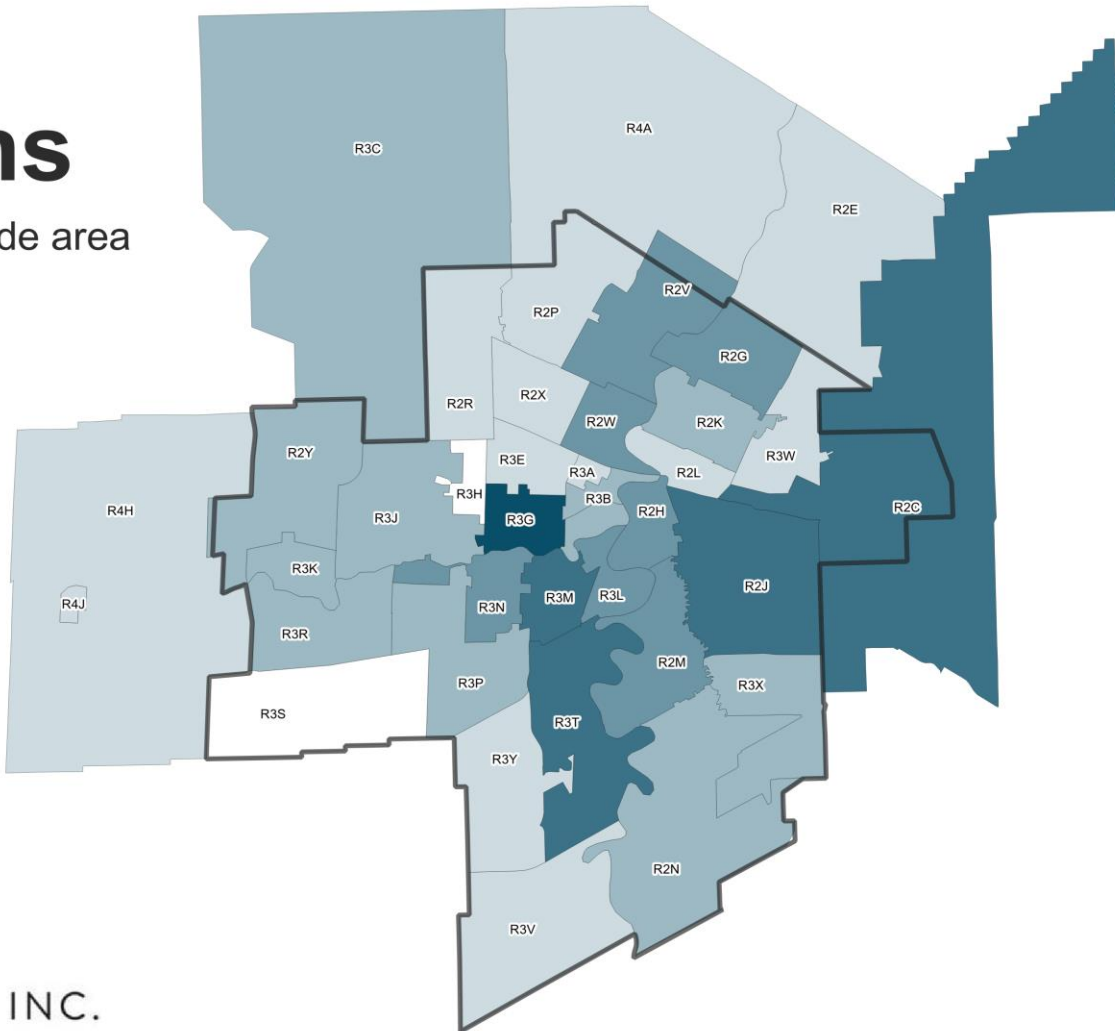
Action/Takeaway:

- Cultivate as champions and ambassadors of the arts and culture.
- Encourage them to activate others as arts patrons (e.g. "bring a friend")

Cultural champions

Responses by postal code area
n = 460

- City limits
- FSA
- No response
- 0.0 - 5.0
- 5.0 - 10.0
- 10.0 - 15.0
- 15.0 - 20.0
- 20.0 +



EMERGING EXPLORERS



Young, diverse and online, this segment is keen to engage with arts and culture – but on their own terms and (for now) not by paying to attend events.



Demographics:

- Highest proportions of Indigenous Manitobans (23%) and new Canadians (21%)
- Skews male (62%)
- Skews younger (66% 18-34)
- Lower levels of household income and education

Attitudes/Perspectives:

- Strongly agree with the value of arts and culture; significant part of their identity
- Most likely to say they do not see their own experiences reflected – and do not feel they fit in
- Most likely to prefer events involving amateurs
- More likely to agree that it is most fulfilling to spend money on tangible items (vs. experiences)

Participation in Arts/Culture:

- Relatively low participation in paid activities (both here and outside the province) – but higher participation in free and community activities
- Also highly likely to engage in the arts via own ethnocultural groups and children

Barriers and Motivations:

- Most likely to want to take part in something because they find it inspiring/be part of something larger
- Parking, hours and perceived lack of transit are more significant barriers
- More likely to take part in child-friendly and more flexible activities
- Higher-than-average likelihood of donating and volunteering – only somewhat likely to buy tickets

Awareness/Communications:

- Only somewhat aware of activities taking place
- Most likely to learn about activities via Instagram and Twitter – least likely to rely on traditional media channels
- Most likely to prefer getting information from Facebook, Instagram, television

Action/Takeaway:

- Community, cultural and dance are the gateway to this group
- Find ways to make paid events worth their while
- Accommodate their needs and expectations to some degree

Emerging explorers

Responses by postal code area

n = 135

City limits

FSA

No response

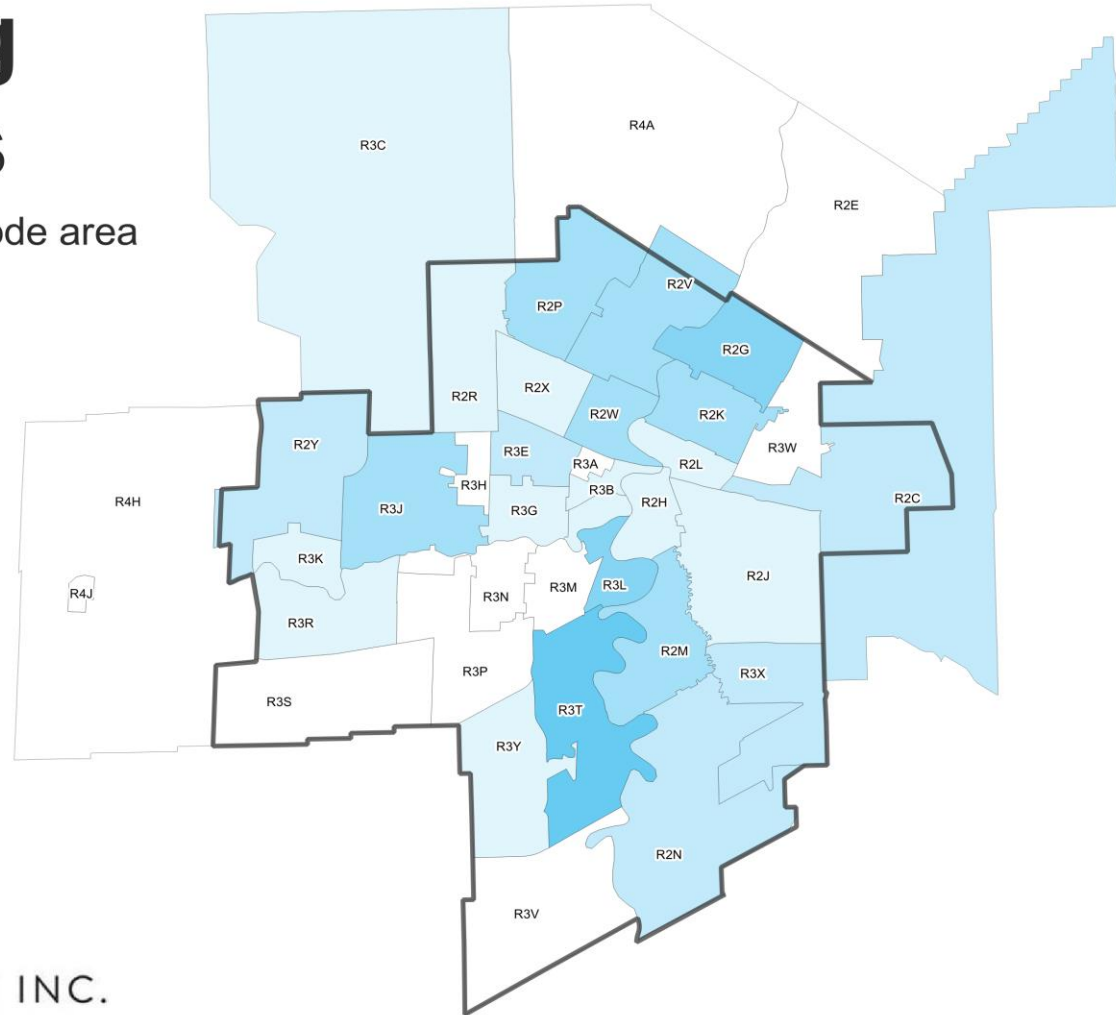
0.0 - 2.0

2.0 - 4.0

4.0 - 6.0

6.0 - 8.0

8.0 +





Somewhat Disinclined from the arts and culture scene, Critical Onlookers play it safe and seek activities that will provide them with basic entertainment.



Demographics:

- Skews slightly male (53%)
- Higher household incomes (42% \$100K+)

Attitudes/Perspectives:

- Lower levels of agreement on statements regarding the benefits of arts/culture
- Low levels of connection to the arts and culture in general

Participation in Arts/Culture:

- Average participation in most paid activities in Manitoba and elsewhere
- Average attendance for free/community events and own community pursuits

Barriers and Motivations:

- More likely to prefer works by professional artists
- Not likely to take risks on unknown works
- Primary reason to attend is entertainment; escape is a secondary motivation
- Not likely to be enticed by other motivating factors (reviews, buzz, flexibility...)

Awareness/Communications:

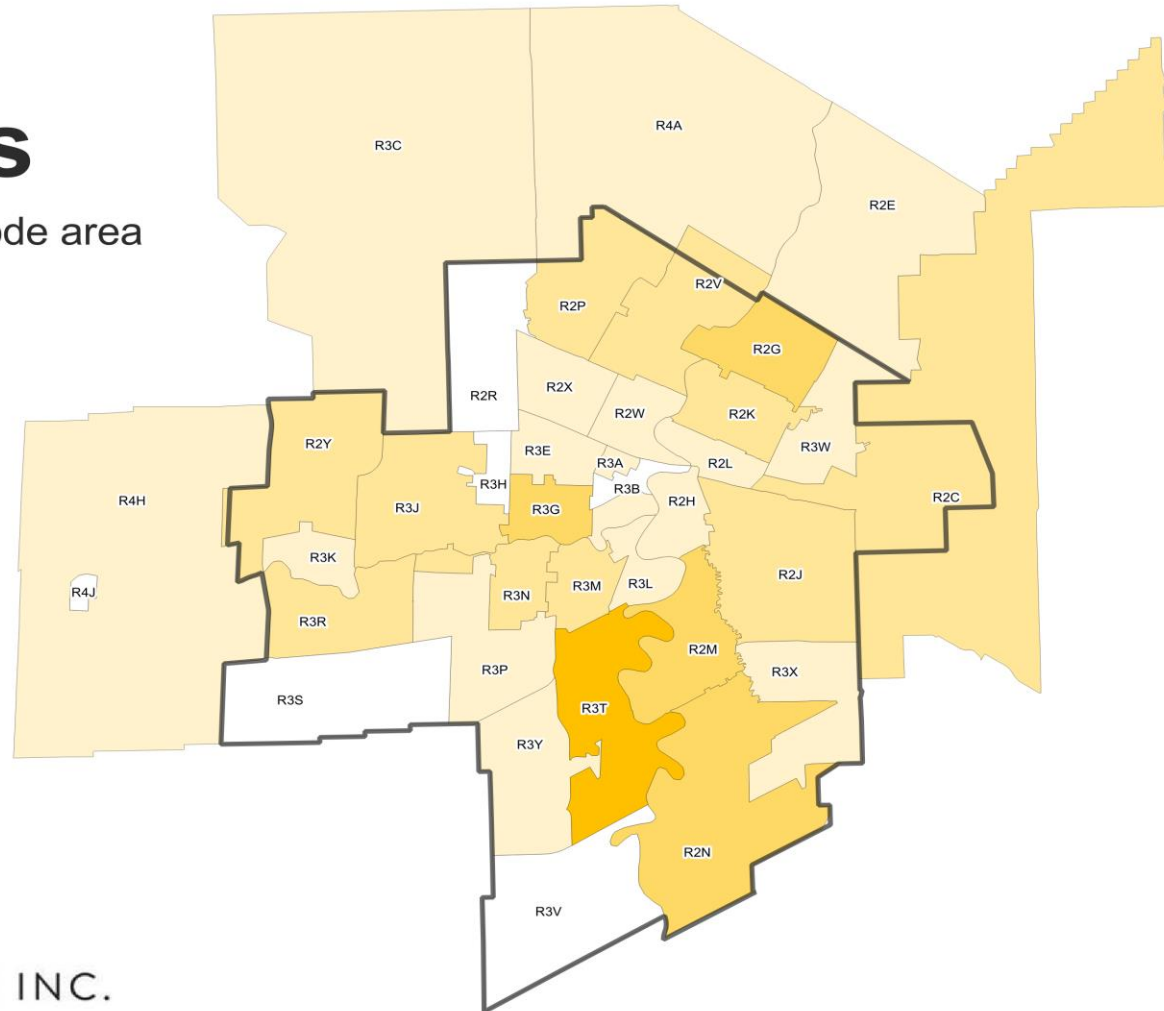
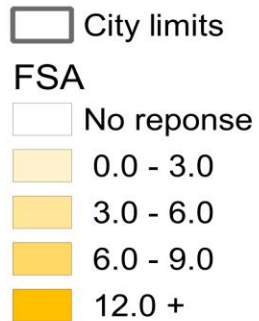
- Low awareness of events
- Most likely to learn about activities via word of mouth, radio, Facebook
- Slightly stronger preference for Facebook for learning about activities/events

Action/Takeaway: May be difficult to engage and likely to participate only in activities they are certain to enjoy and are more “middle of the road”.

Critical onlookers

Responses by postal code area

n = 189



SOCIABLE CONFORMISTS



Although not inclined towards the arts in general, Sociable Conformists may become engaged if someone else nudges them along.



Demographics:

- Higher proportions in rural MB (44%), northwest Winnipeg (26%)
- Skews female (56%)
- Skews slightly older (33% 55+)
- Low-to-moderate household income

Attitudes/Perspectives:

- Less likely to believe the arts unifies and improves well-being
- Low childhood connection to the arts
- More likely to be proud of the success of Manitoba artists elsewhere

Participation in Arts/Culture:

- Lower-than-average theatre, dance and film attendance; average for other items
- Lower-than-average attendance for most free/community events
- Lower participation in other artistic/cultural pursuits (but higher than average viewership of film/TV)

Barriers and Motivations:

- Slightly more likely to prefer amateur/community performance
- Primary reason to attend is to socialize; learning about other cultures is a secondary motivator
- More likely to attend if have someone to go with, if someone recommends it or if it's child-friendly
- Average likelihood of purchasing single tickets (but little else)

Awareness/Communications:

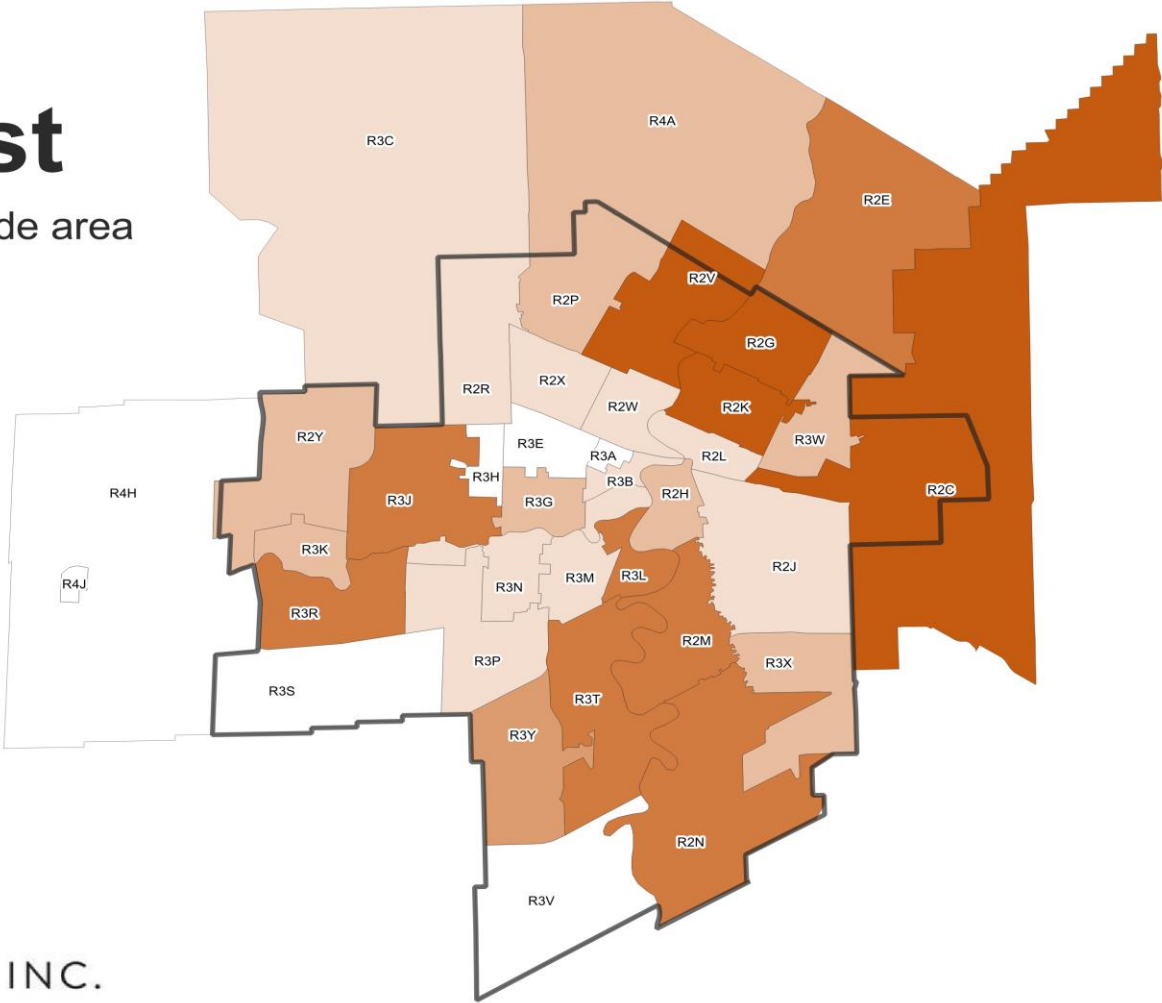
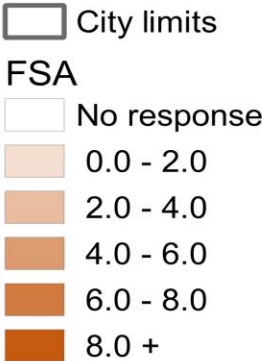
- Lower awareness of events
- Most likely to learn about activities via word of mouth
- Prefer a wide array of media channels (Facebook, print, radio, etc.)

Action/Takeaway:

- Increase their exposure to arts and culture through someone else (e.g. Cultural Champions)
- Emphasize the socializing opportunities of the arts, and convince them of the wider social/well-being benefits

Sociable conformist

Responses by postal code area
n = 224





This segment is unlikely to partake in any kind of cultural activity - and is not inclined to do so in the future.



Demographics:

- Skews very male (73%)
- Skews rural (46%)
- Most likely to be age 35-54 (44%)
- Lower levels of education
- Most likely to be born in Canada

Attitudes/Perspectives:

- Lowest levels of agreement with nearly all statements regarding the benefits of arts/culture
- More likely to feel fulfilled by purchasing items vs. experiences
- Most likely to agree that artistic and cultural experiences are boring and a waste of money

Participation in Arts/Culture:

- Lowest levels of participation in all types of Manitoba events – 10% have not taken part in any activities in their lifetimes.
- Least likely to have attended free events or other cultural activities here or elsewhere

Barriers and Motivations:

- Most likely to take part in something only if they know they will enjoy it
- Top reasons for going include being entertained and to socialize
- Most likely to cite specific (cost, parking, hours, etc.) as being major barriers to attendance
- Less likely to be motivated to attend by other factors

Awareness/Communications:

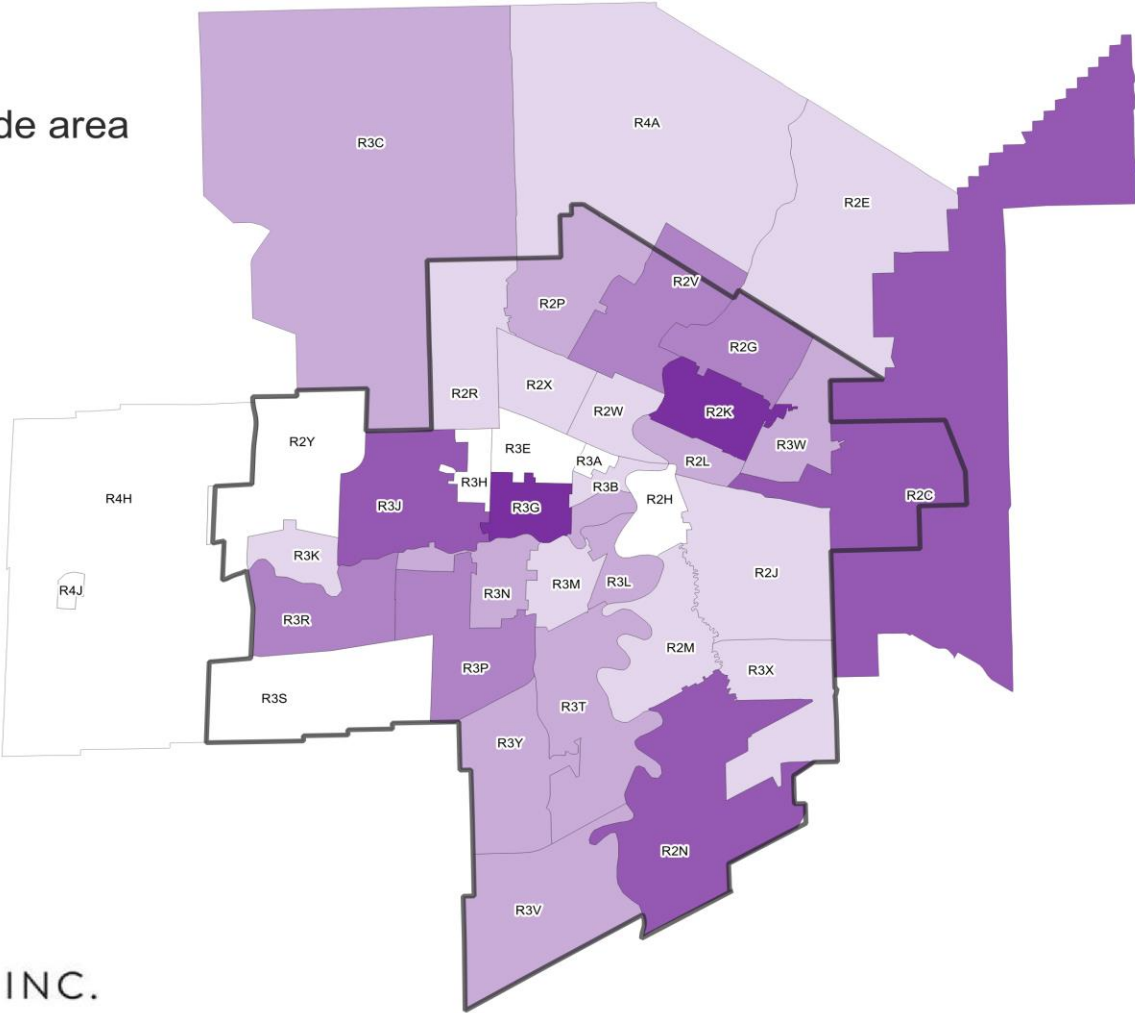
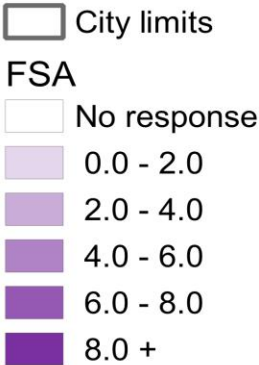
- Least aware of arts/culture activities
- Highest proportion to say that they do not use any channel to learn about events (newspaper is average, other channels lower)
- Most likely to prefer word of mouth

Action/Takeaway:

- Ignore this segment – they are unlikely to be engaged no matter what efforts are taken.

Disinclined

Responses by postal code area
n = 185



PREFERENCES, BARRIERS AND MOTIVATIONS



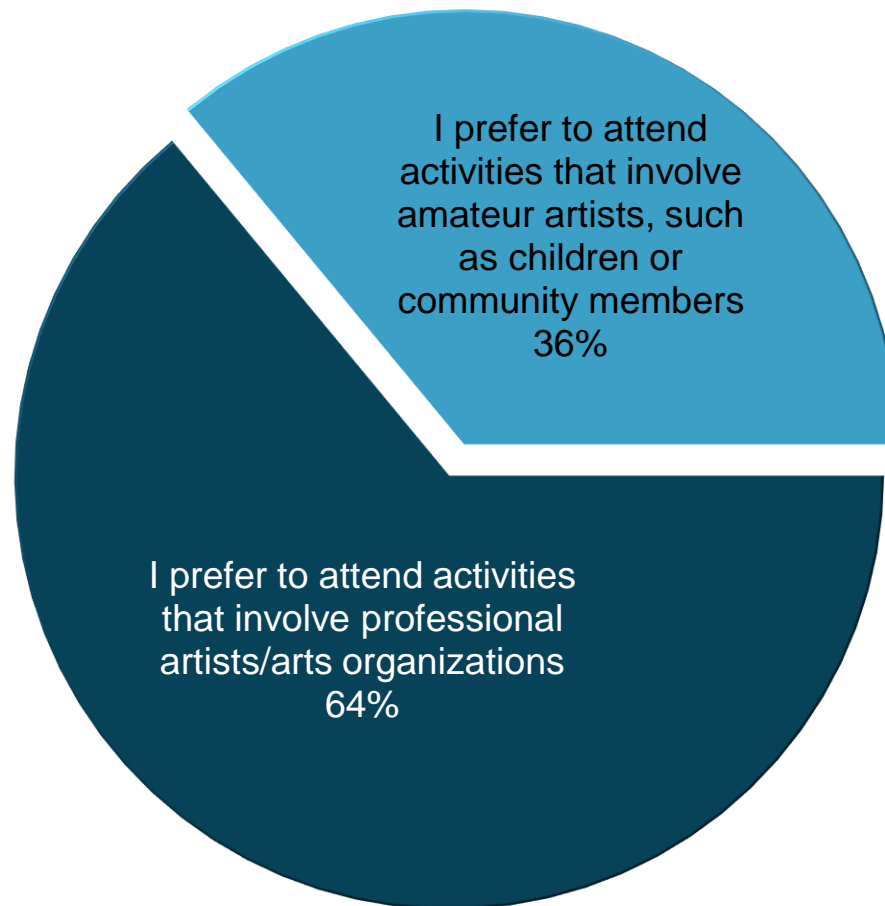
KEY FINDINGS:

PREFERENCES, BARRIERS AND MOTIVATIONS

- Nearly two-thirds of Manitobans prefer activities that involve professional artists and arts organizations. Only four-in-ten prefer activities involving amateur and community groups.
- More than six-in-ten gravitate towards activities they know they will enjoy, while four-in-ten are more willing to take a risk on something. Cultural Champions are more inclined to be risk-takers in this regard, with other segments more likely to play it safer.
- When asked to rank their motivations for attending arts and cultural events, Manitobans are most likely to say they go to be entertained, which is no surprise. Almost as powerful, however, is the need to connect and socialize with friends and family. These reasons dominate especially with segments less likely to be regular patrons of the arts.
- Similarly, Manitobans say they are more likely to take part in an activity if they have someone to go with, or if someone they know recommends it. Among our segments, Emerging Explorers (and to a lesser extent Sociable Conformists) are more inclined to take part if the event is both child-friendly and flexible (for instance, if you can sit or stand where you want or come and go as you please).
- Cost is cited as the most significant barrier to attending arts and cultural activities more often, although this may be somewhat of a reflexive response. Other practical barriers that may be more actionable, particularly for target segments, are difficulty finding parking and events taking place too late in the evening.
- About two-thirds of Manitobans say they are very or somewhat likely to purchase single tickets to a performance (or say they already do), with about four-in-ten inclined to donate or volunteer with an artistic or cultural organization. Slightly fewer than three-in-ten would consider a bigger financial and time commitment - buying season tickets or purchasing a membership to an arts organization.

NEARLY TWO-THIRDS PREFER ACTIVITIES INVOLVING PROFESSIONAL ARTISTS

Q18. "Which of the following two statements are you most likely to agree with?"



Those most likely to prefer activities involving **amateur/community artists** include:

- Emerging Explorers (41%) and Sociable Conformists (45%)
- Rural Manitobans (44% vs. 31% among those in Winnipeg)
- Older adults (40% among those 55+ vs. 31% among those 18-34)
- Those with less formal education (42% among those with a high school diploma or partial post-secondary vs. 33% among those with a university degree)
- Those whose primary purpose for taking part in an activity is to socialize (48%)

Base: All respondents (N=1,200)

SIX-IN-TEN ARE INCLINED TO ATTEND EVENTS THEY KNOW THEY WILL ENJOY

Q19. “And, again, which of the following two statements are you most likely to agree with?”



Those most likely to **take a risk** on an arts/cultural event include:

- Cultural Champions (53%)
- Core area residents (45%)
- Indigenous citizens (47%)
- Those whose primary motivation for taking part in an activity is to learn (48%)
- Those who are less likely to attend artistic/cultural events and who are less likely to be aware of events taking place

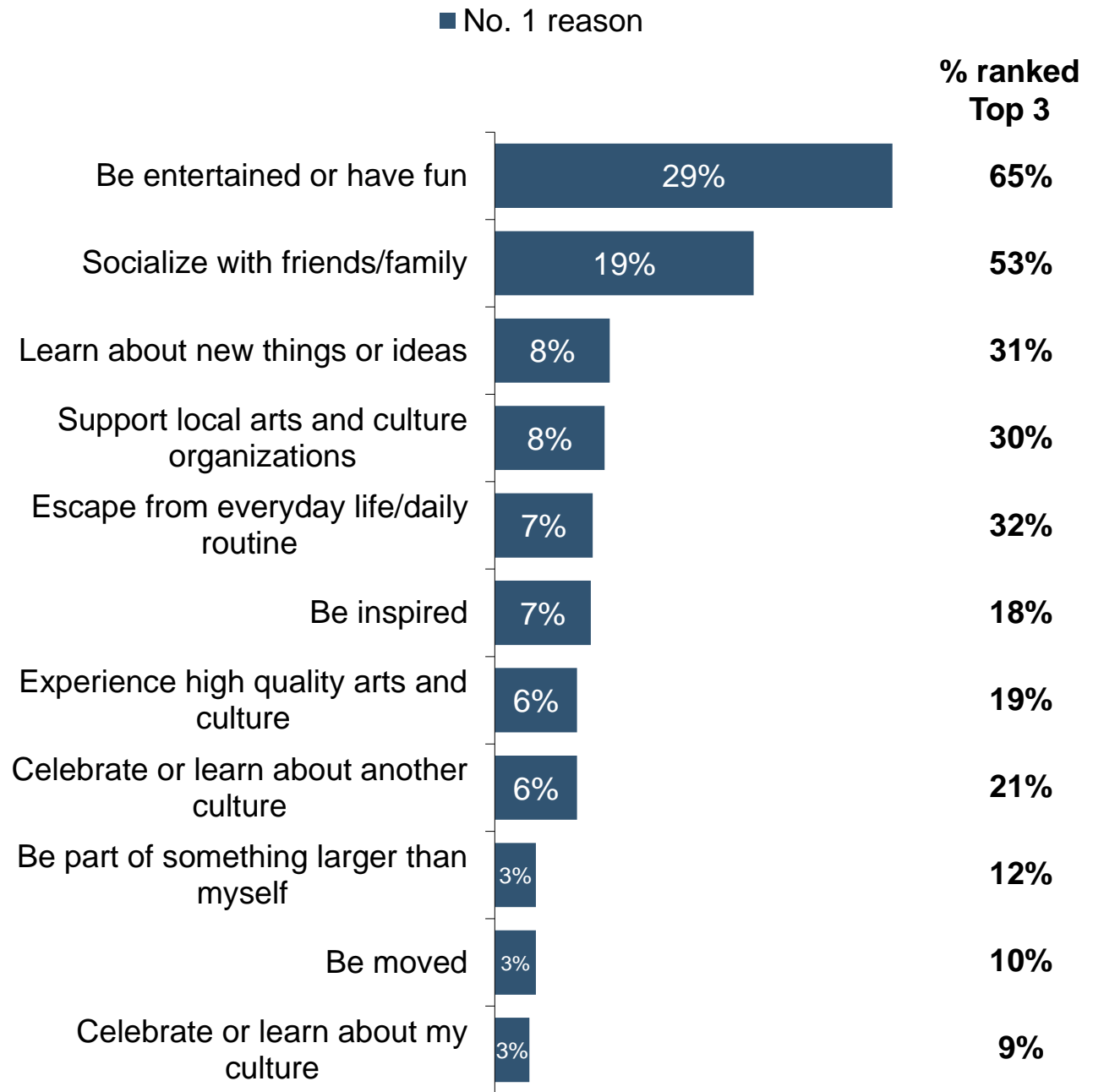
Base: All respondents (N=1,200)

ONE-THIRD ATTEND ARTS TO BE ENTERTAINED, TWO-IN-FIVE TO SOCIALIZE

RANKING OF REASONS TO ATTEND EVENTS

Q20. "There are many reasons why you might attend arts and cultural events. Please read the list below and rank your top three reasons by dragging and dropping them into the box."

Base: All respondents (N=1,200)



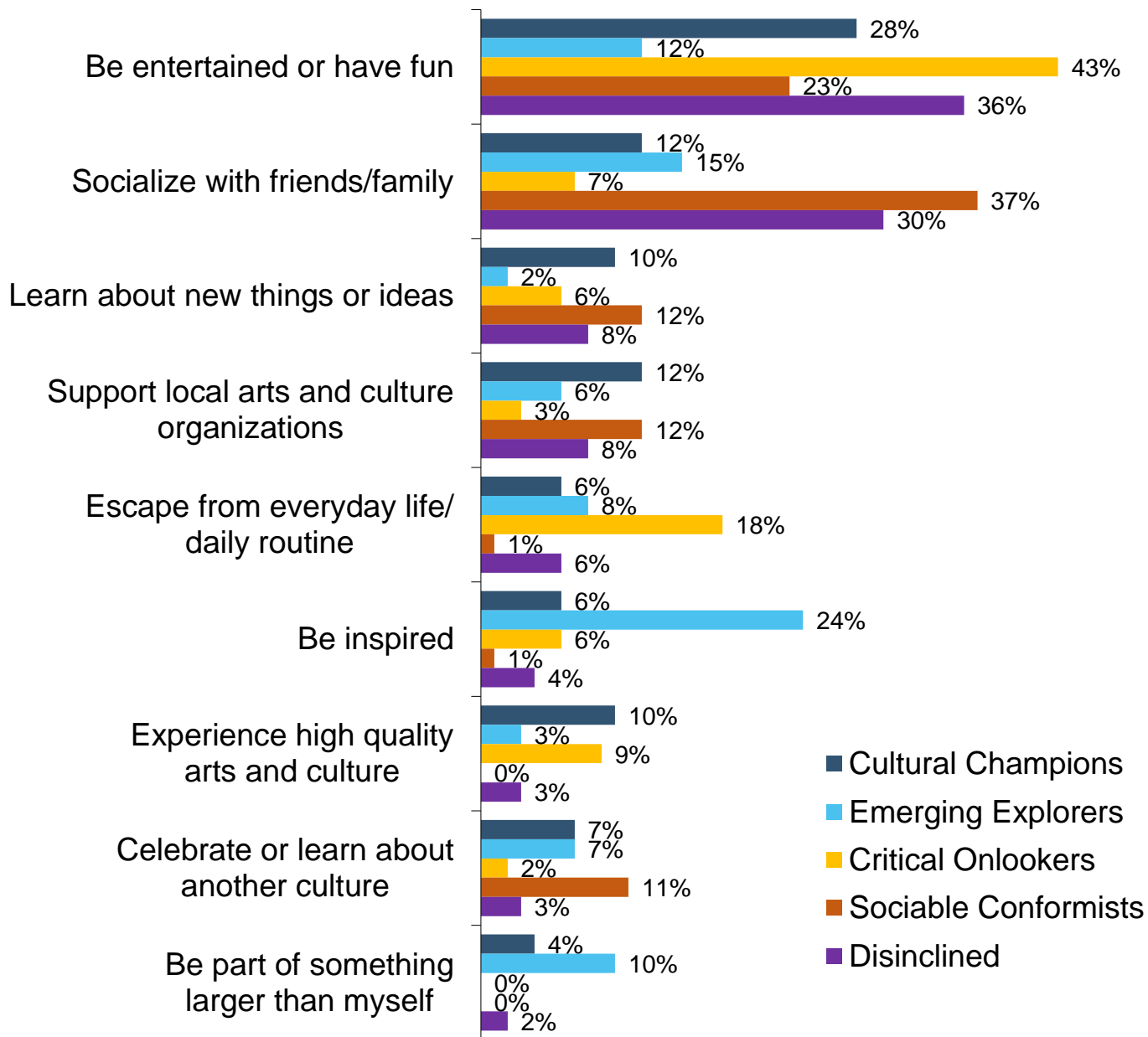
CULTURAL CHAMPIONS WANT TO SUPPORT ARTS ORGANIZATIONS, EMERGING EXPLORERS SEEK INSPIRATION

RANKING OF REASONS TO ATTEND EVENTS, BY SEGMENT

Q20. "There are many reasons why you might attend arts and cultural events. Please read the list below and rank your top three reasons by dragging and dropping them into the box."

Base: All respondents (N=1,200)

% who rank among the top-3 reasons for attending a cultural activity

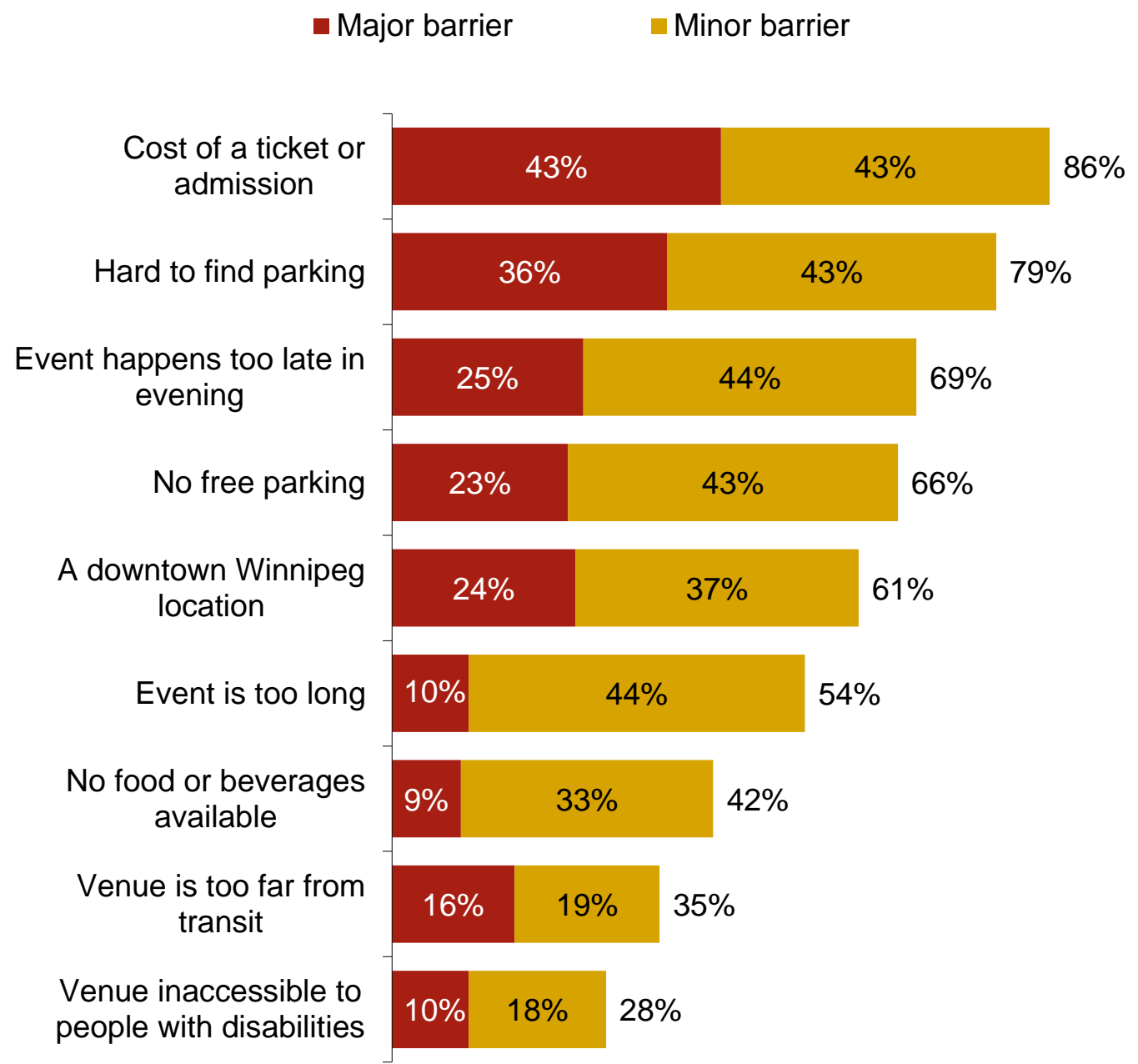


COST, PARKING TOP BARRIERS TO ARTS ATTENDANCE

BARRIERS TO ATTENDANCE

Q21. “To what extent, if at all, are each of the following a barrier – that is, something that prevents you from attending artistic and cultural activities as often as you might like?”

Base: All respondents (N=1,200)

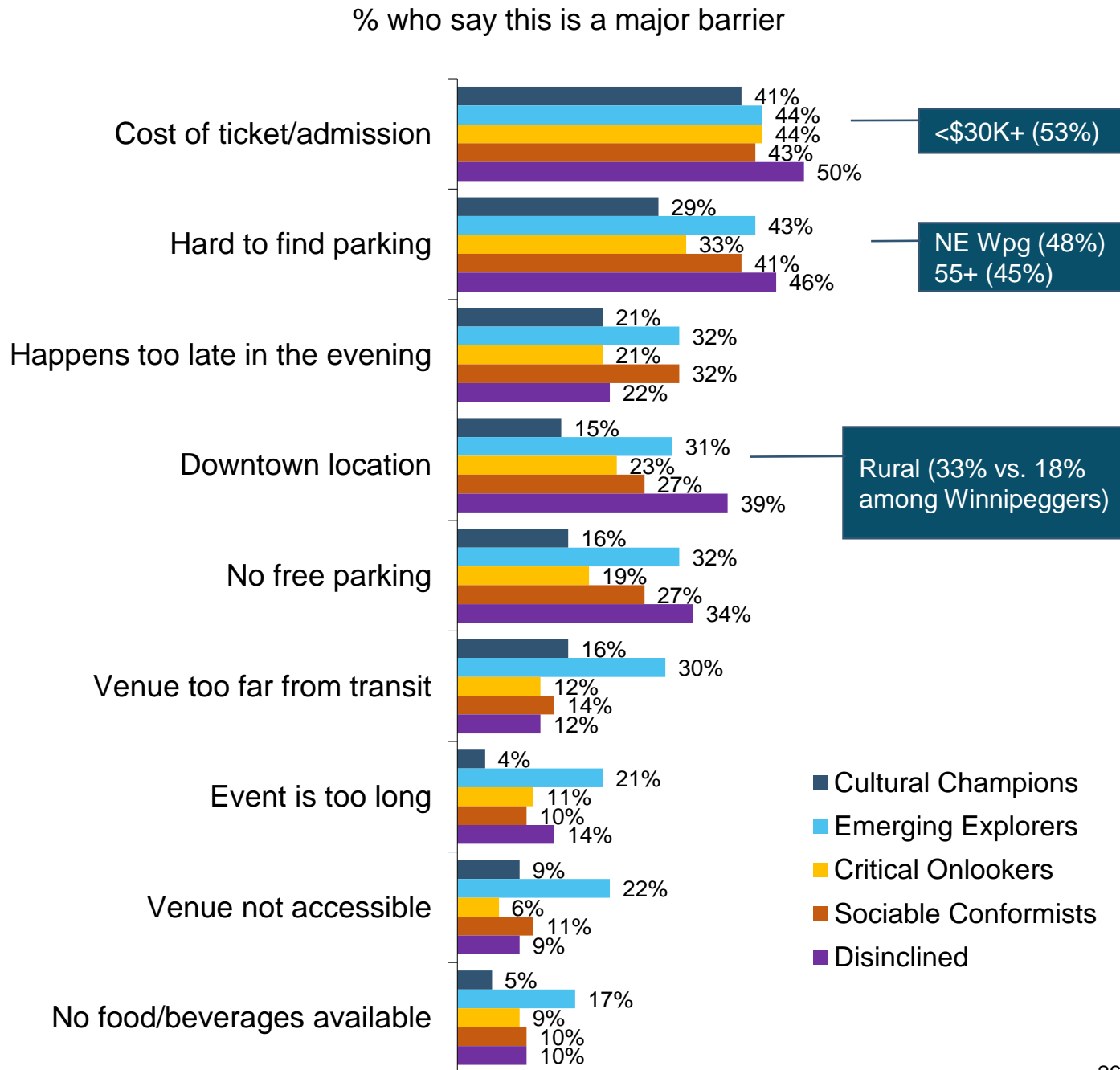


EMERGING EXPLORERS, DISINCLINED MOST LIKELY TO CITE LOCATION-RELATED BARRIERS

BARRIERS TO ATTENDANCE, BY SEGMENT

Q21. "To what extent, if at all, are each of the following a barrier – that is, something that prevents you from attending artistic and cultural activities as often as you might like?"

Base: All respondents (N=1,200)

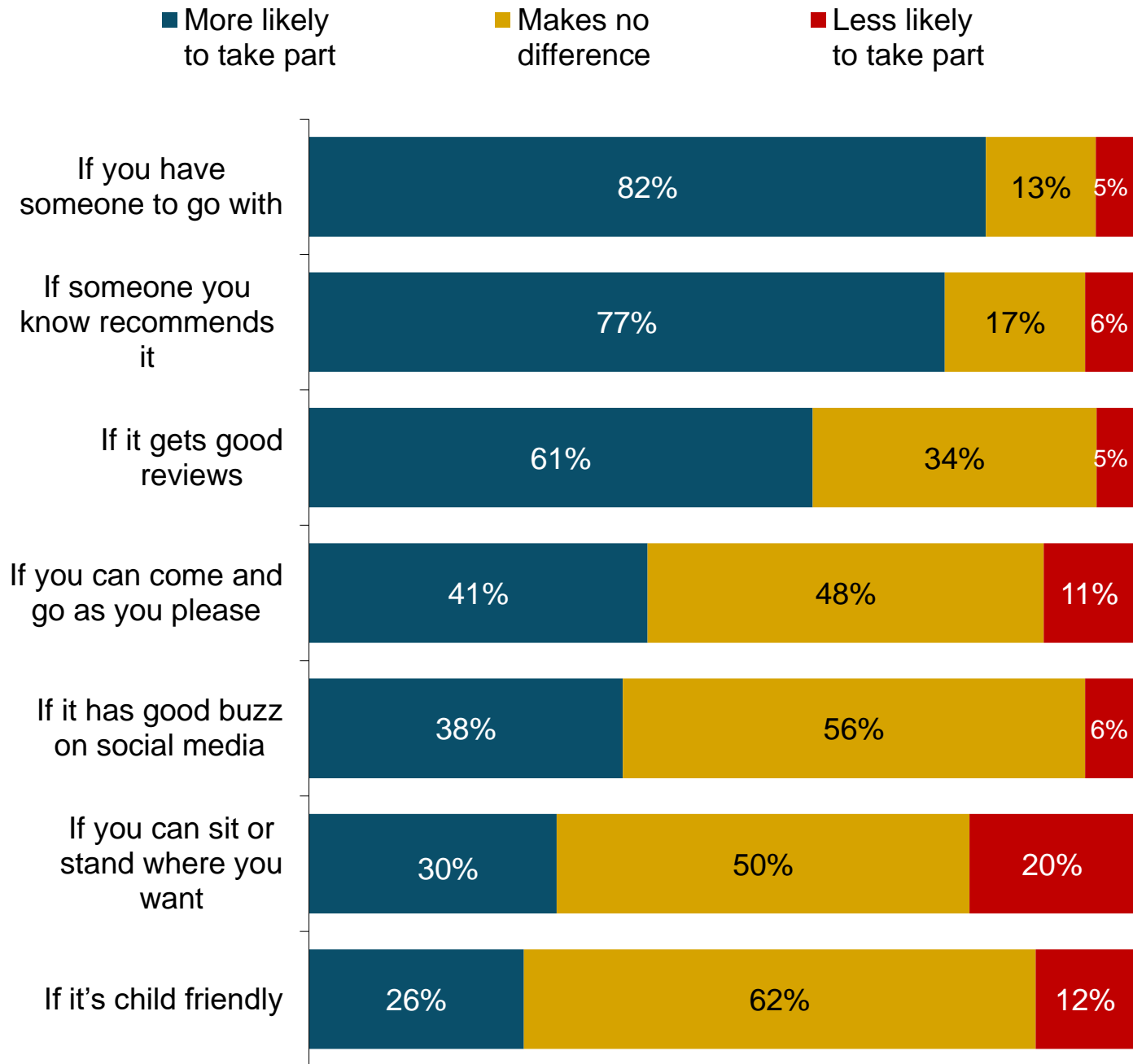


EIGHT-IN-TEN ARE MORE LIKELY TO ATTEND ARTS EVENTS IF RECOMMENDED, HAVE SOMEONE TO GO WITH

FACTORS INFLUENCING ATTENDANCE

Q22. "For each of the following, please indicate if these are more likely or less likely to convince you to take part in a cultural activity, or if they do not make a difference."

Base: All respondents (N=1,200)

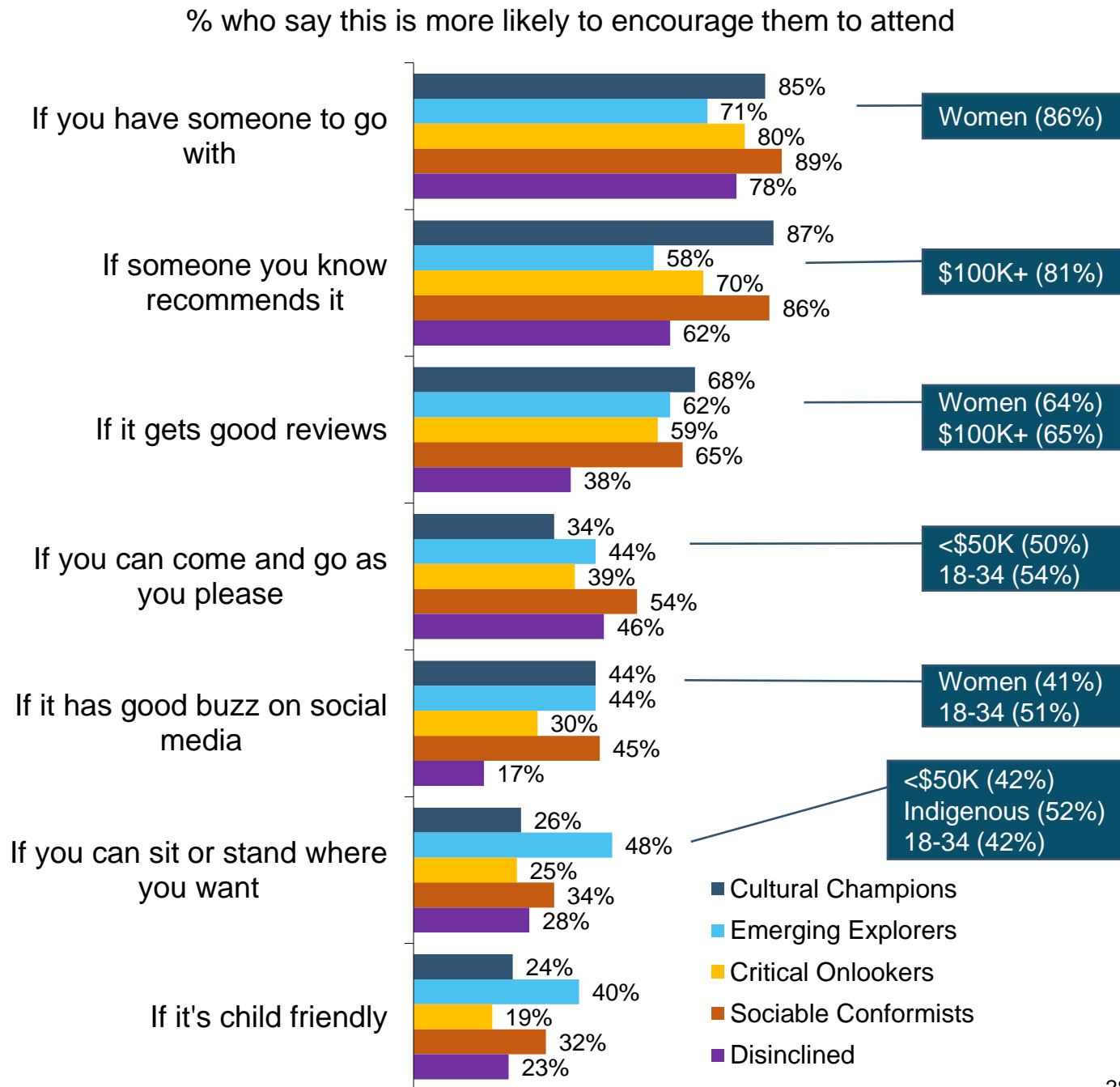


EMERGING EXPLORERS MORE LIKELY TO ATTEND IF THEY CAN SIT ANYWHERE, IF IT'S CHILD FRIENDLY

ATTENDANCE MOTIVATORS, BY SEGMENT

Q22. "For each of the following, please indicate if these are more likely or less likely to convince you to take part in a cultural activity, or if they do not make a difference."

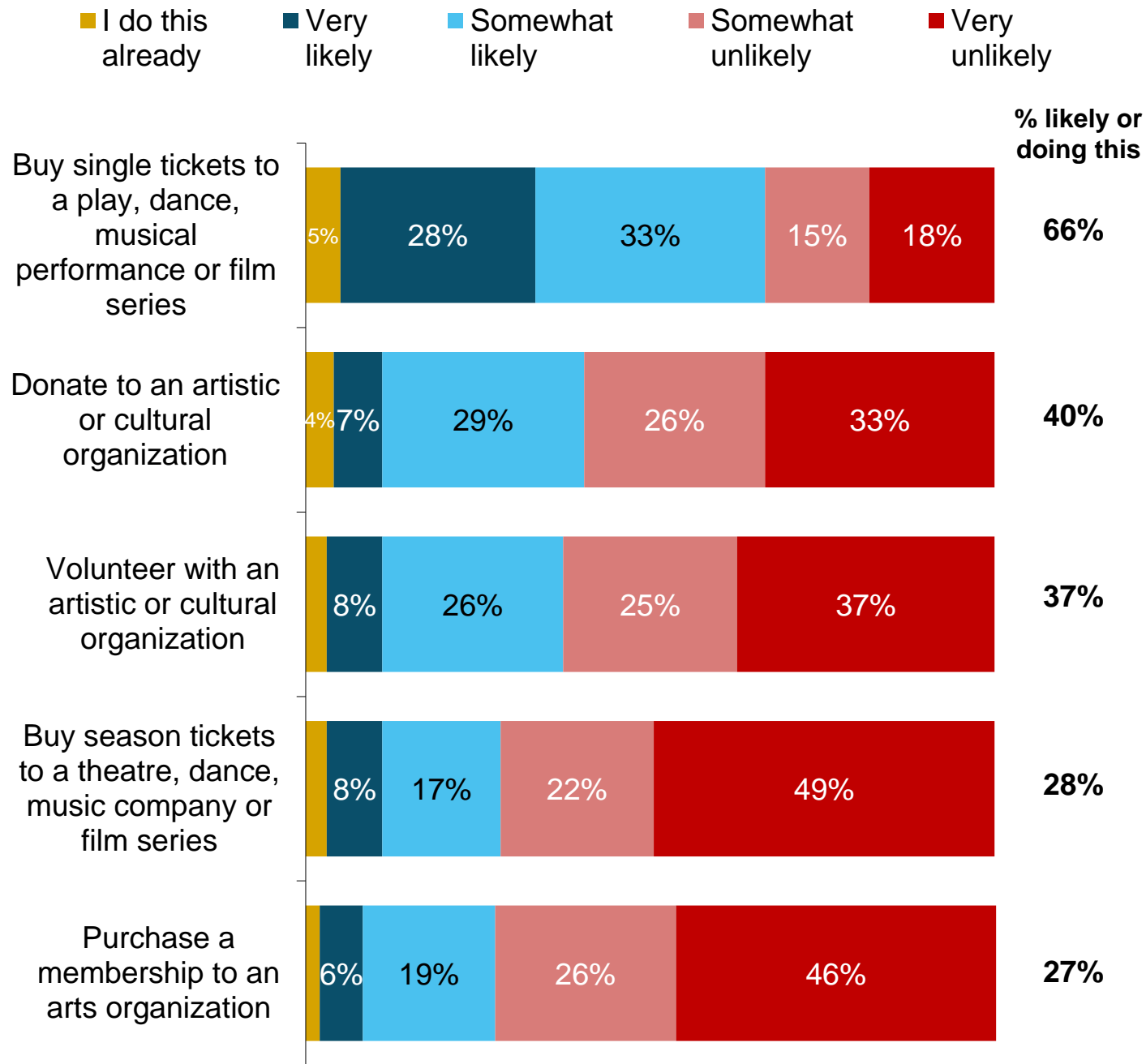
Base: All respondents (N=1,200)



MOST RESPONDENTS LIKELY TO PURCHASE SINGLE TICKETS

FUTURE INTENTIONS

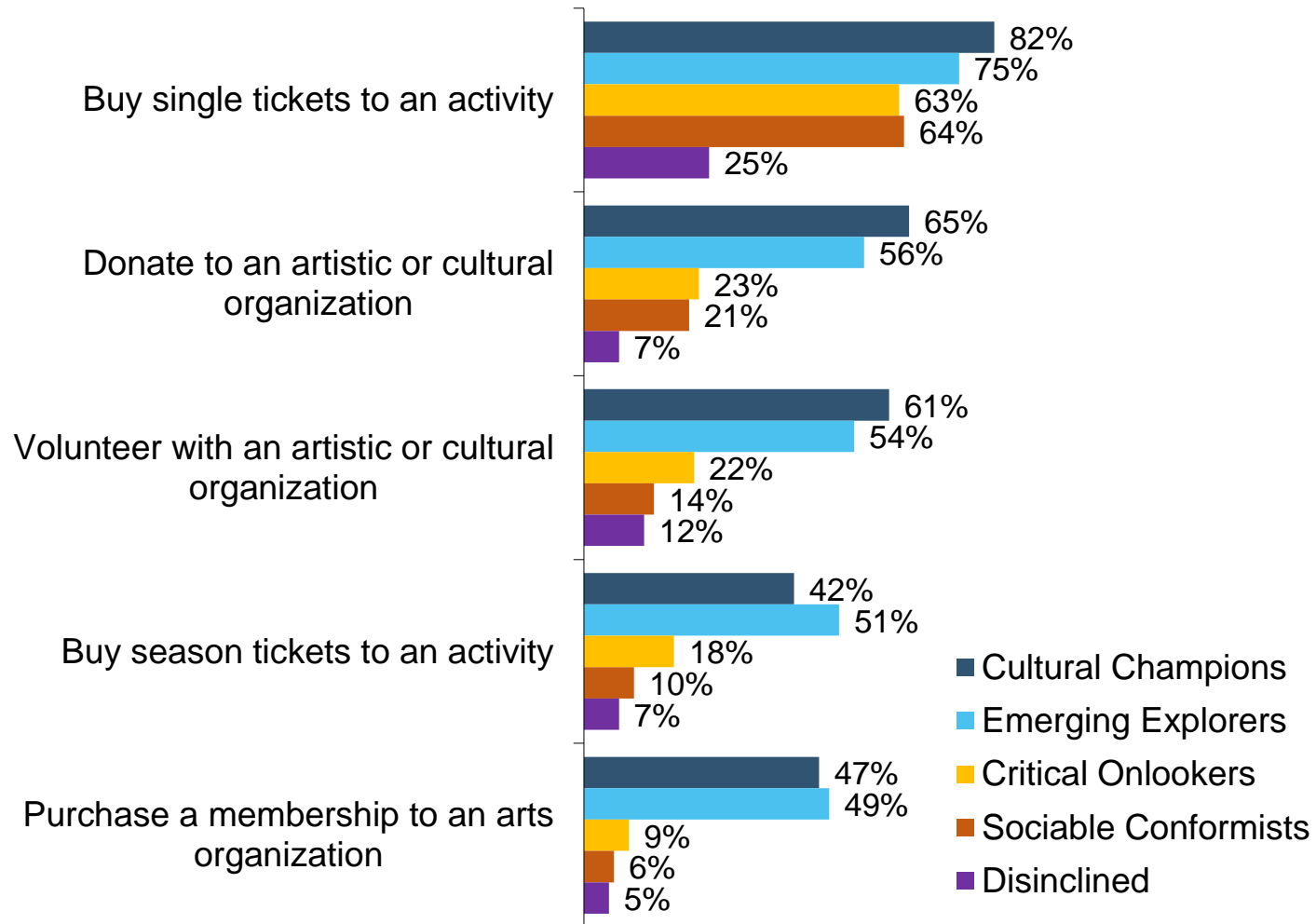
Q24. "How likely are you to do each of the following activities in Manitoba?"



Base: All respondents (N=1,200)

CULTURAL CHAMPIONS, EMERGING EXPLORERS MOST LIKELY TO PURCHASE, DONATE OR VOLUNTEER

% who say this are very/somewhat likely to do this, or do it already



- University grads are more likely to buy a single ticket to an event (71%)
- Core area residents are more likely to donate to an arts group (51%), to volunteer (48%) and to buy a membership (45%)
- In general, women are more likely than men to donate, volunteer and buy season tickets.

Q24. "How likely are you to do each of the following activities in Manitoba?"

Base: All respondents (N=1,200)

ATTITUDES REGARDING THE ARTS AND CULTURE



KEY FINDINGS:

GENERAL ATTITUDES

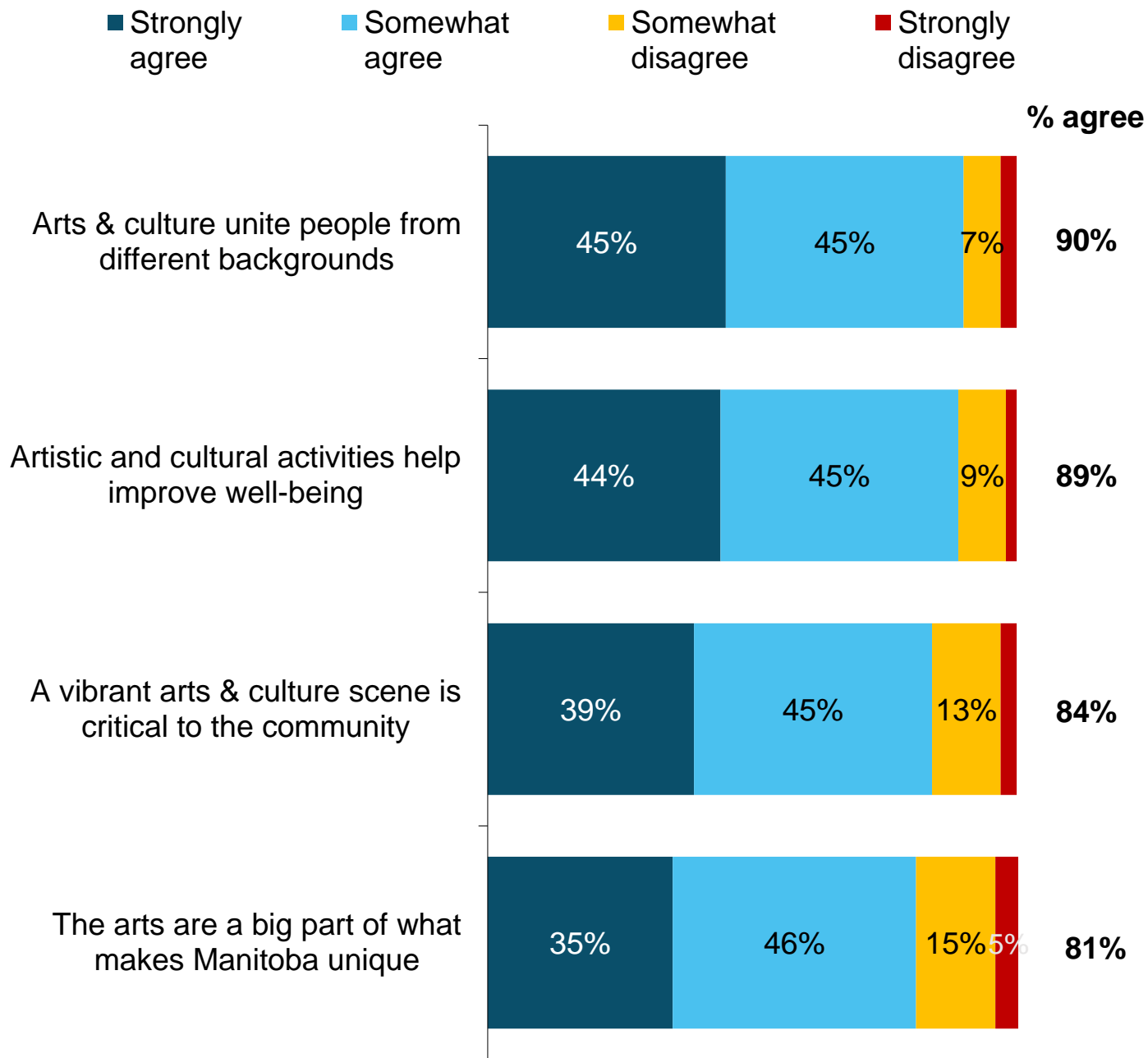
- Manitobans have strong personal connections to the arts. A significant majority of those surveyed say they often have an emotional reaction to a performance and have fond childhood memories related to the arts. Cultural Champions and Emerging Explorers are significantly more likely to say this is the case.
- Even stronger majorities see the social value of the arts. For example, nine-in-ten Manitobans agree arts and culture unite people from different backgrounds and improve well-being. As well, strong majorities are proud of the artists who emerge from Manitoba and feel a responsibility to support the industry.
- However, four-in-ten Manitobans do not see their own life experiences reflected in local artistic and cultural activities, with a similar proportion saying they do not feel they fit in at these types of events.

NINE-IN-TEN BELIEVE THE ARTS AND CULTURE UNITE PEOPLE AND IMPROVE THEIR WELL-BEING

VIEWS ON ARTS/CULTURE AND THE COMMUNITY

Q1. "Please read the following statements and indicate if you agree or disagree."

Base: All respondents (N=1,200)

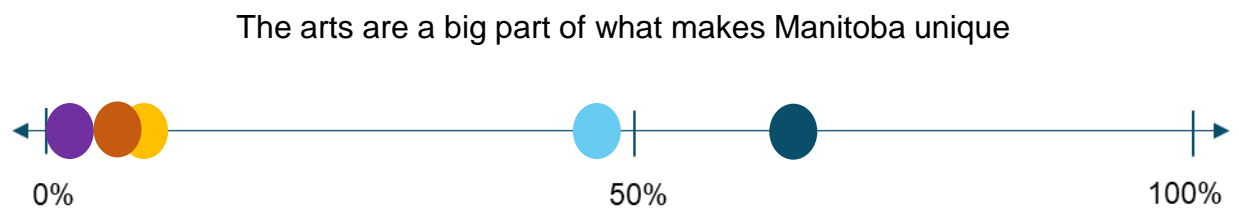
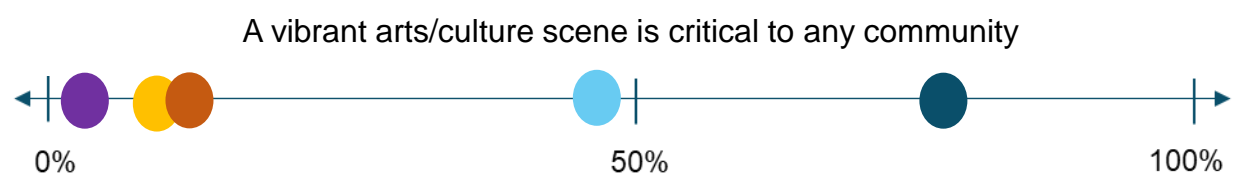
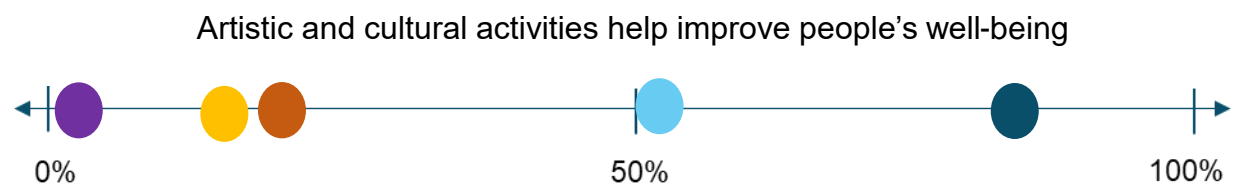
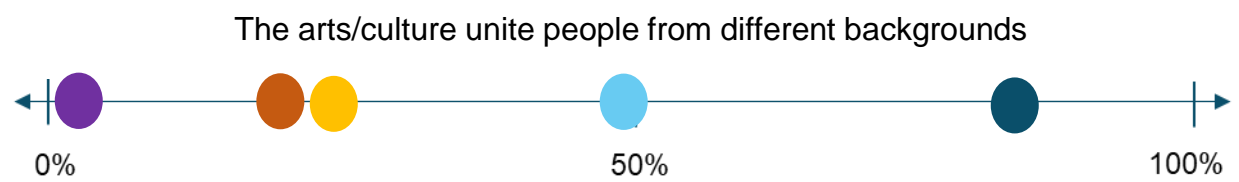


VIEWS ON ARTS AND CULTURE AND THE COMMUNITY

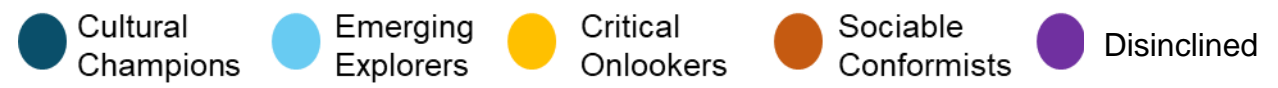
SEGMENT COMPARISON

Q1. "Please read the following statements and indicate if you agree or disagree."

The following graph shows the relative placement on a 0-100 scale based on the percentage of this segment who strongly agree with this statement:



Base: All respondents (N=1,200)

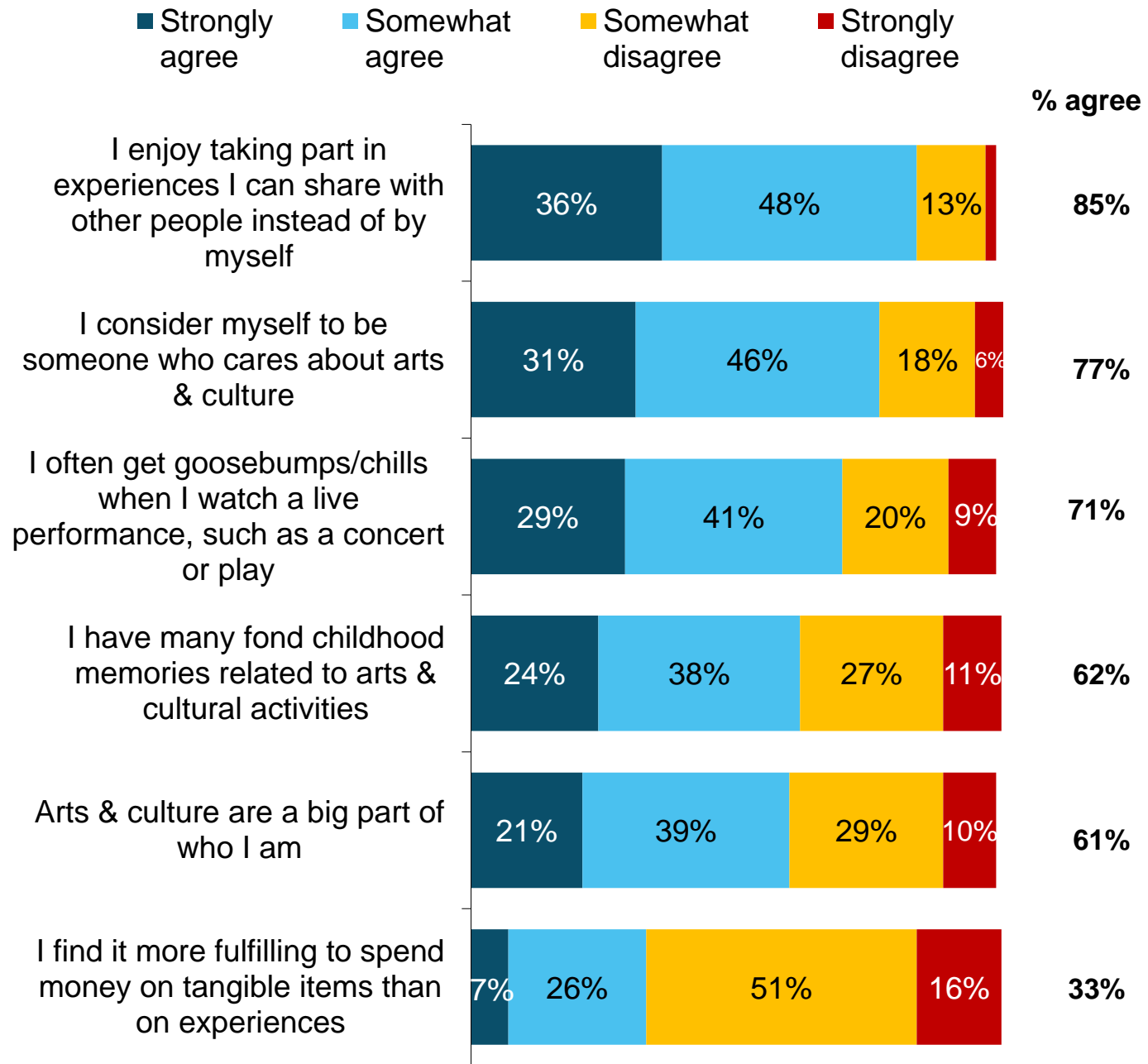


MORE THAN EIGHT-IN-TEN ENJOY BEING PART OF COLLECTIVE EXPERIENCES

INDIVIDUAL CONNECTION TO THE ARTS/CULTURE

Q1. "Please read the following statements and indicate if you agree or disagree."

Base: All respondents (N=1,200)

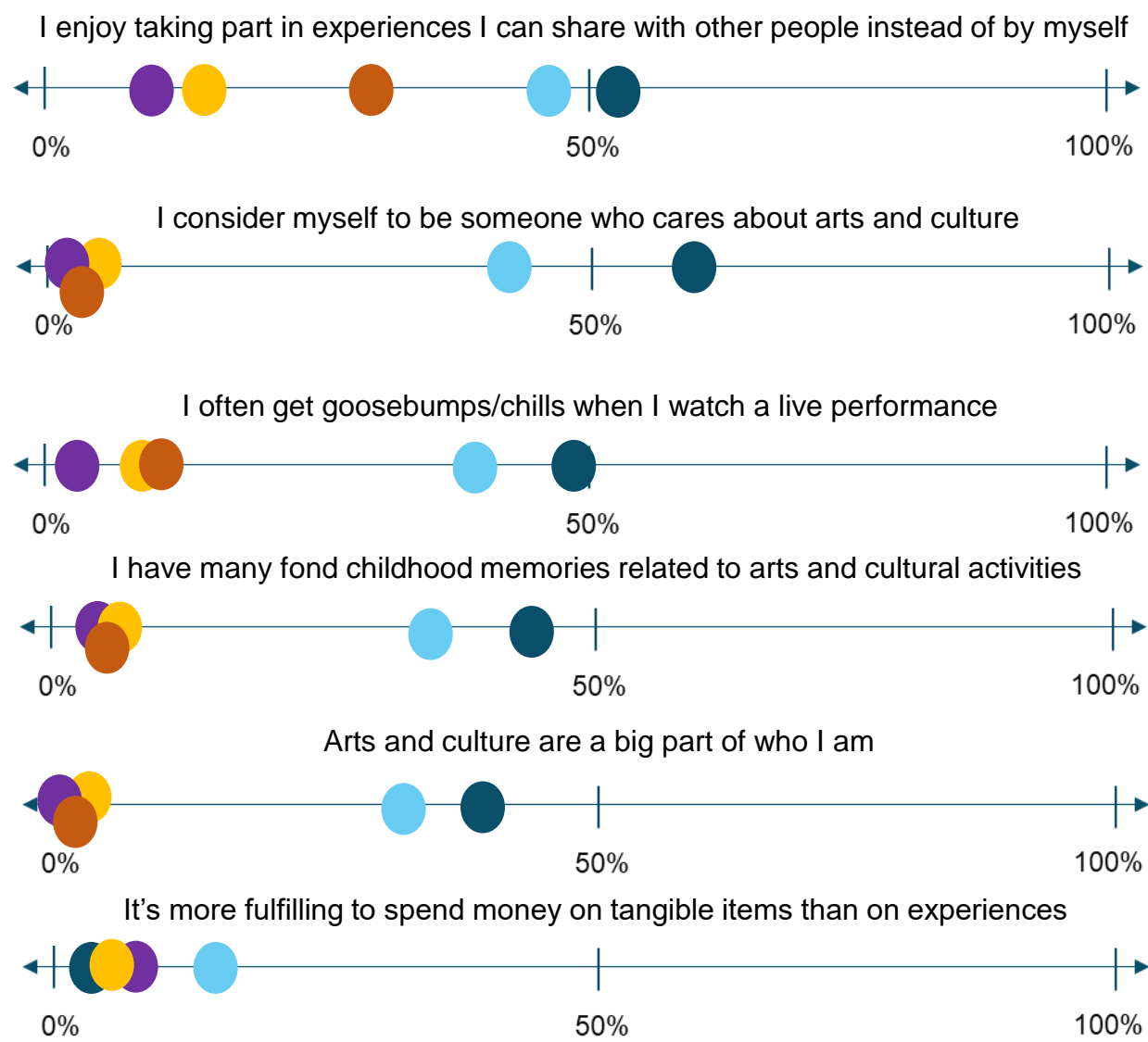


INDIVIDUAL CONNECTION TO ARTS AND CULTURE

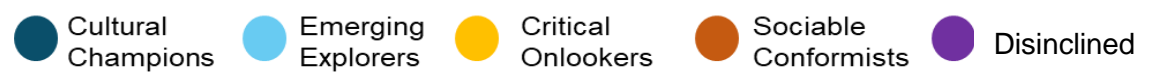
SEGMENT COMPARISON

Q1. "Please read the following statements and indicate if you agree or disagree."

The following graph shows the relative placement on a 0-100 scale based on the percentage of this segment who strongly agree with this statement:



Base: All respondents (N=1,200)

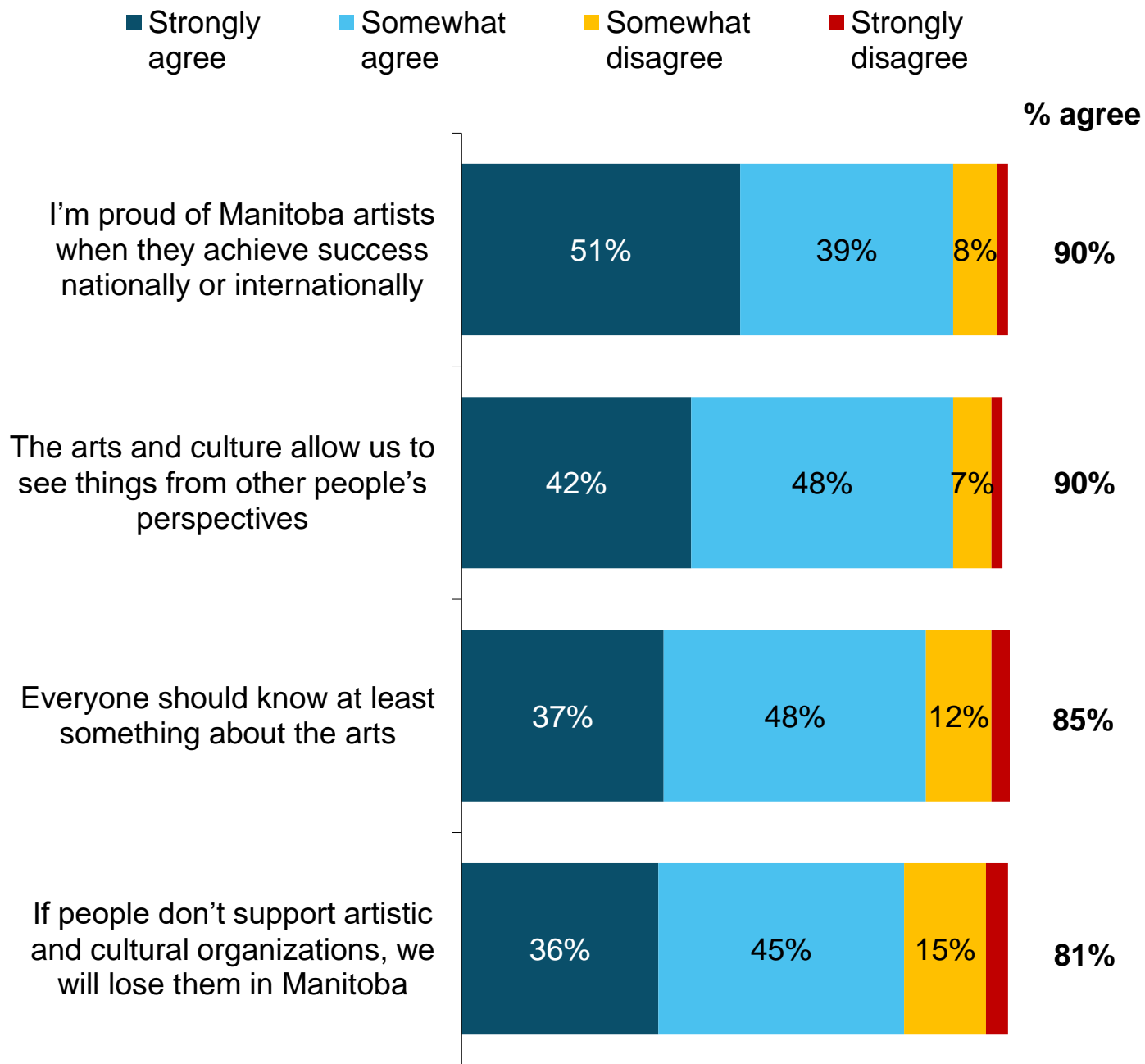


HIGH AGREEMENT THAT ARTS ARE IMPORTANT

PERCEPTIONS OF THE VALUE OF ARTS/CULTURE

Q23. "Please indicate to what extent you agree or disagree with each of the following statements."

Base: All respondents (N=1,200)



PERCEPTIONS ON THE VALUE OF ARTS AND CULTURE

SEGMENT COMPARISON

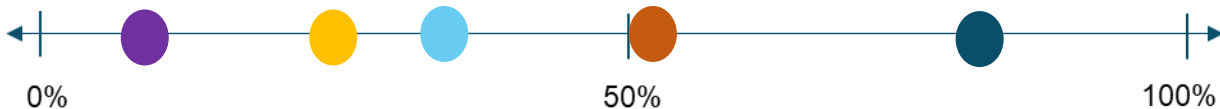
Q23. "Please indicate to what extent you agree or disagree with each of the following statements."

The following graph shows the relative placement on a 0-100 scale based on the percentage of this segment who strongly agree with this statement:

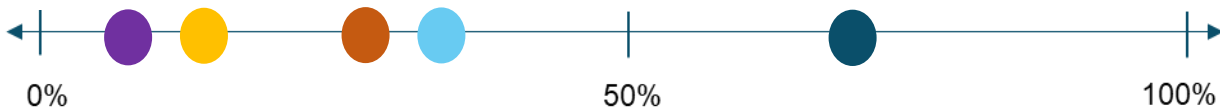
The arts and culture allows us to see things from other people's perspectives.



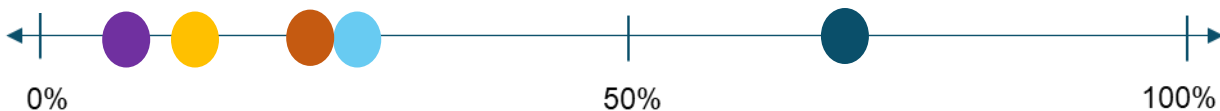
I'm proud of Manitoba artists when they achieve success nationally or internationally.



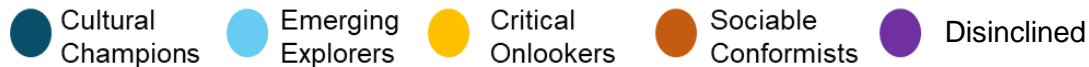
Everyone should know at least something about the arts



If people don't support artistic and cultural organizations, we will lose them in Manitoba.



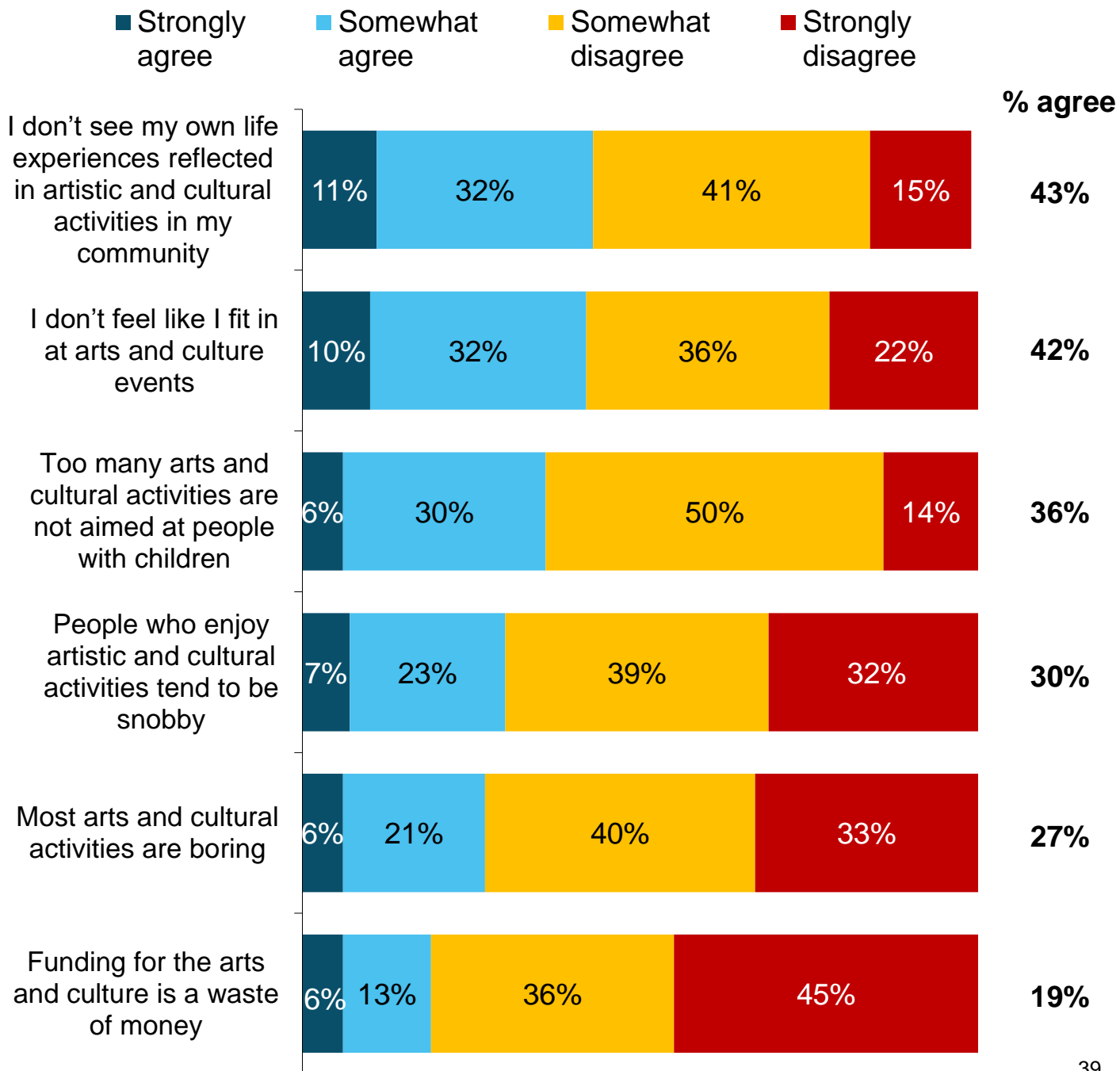
Base: All respondents (N=1,200)



FOUR-IN-TEN FEEL THEY DON'T BELONG, AREN'T REFLECTED IN ARTS

PERSONAL PERSPECTIVES ON THE ARTS/CULTURE

Q23. "Please indicate to what extent you agree or disagree with each of the following statements."



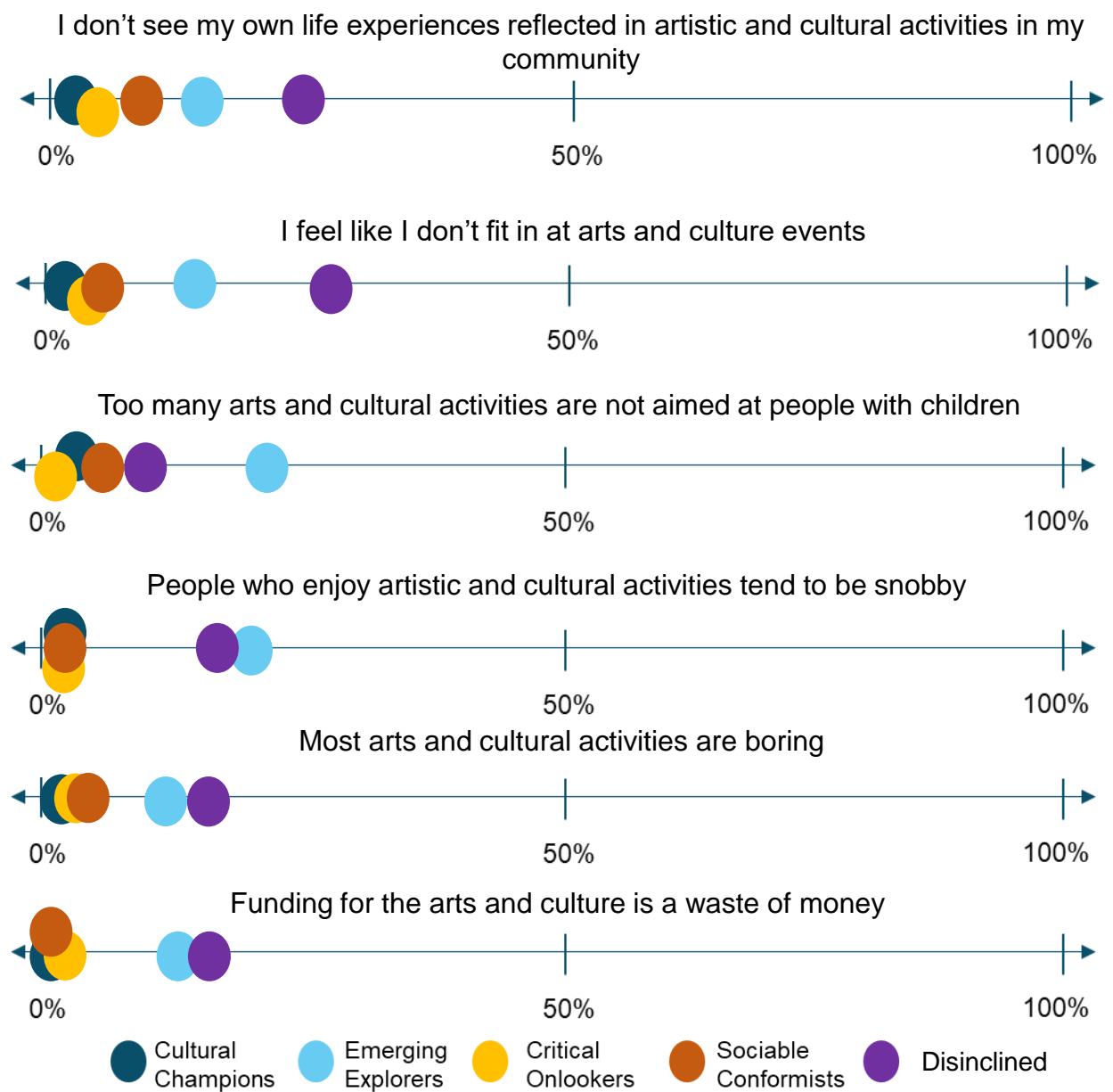
Base: All respondents (N=1,200)

PERSONAL PERSPECTIVES ON THE ARTS AND CULTURE

SEGMENT COMPARISON

Q23. "Please indicate to what extent you agree or disagree with each of the following statements."

The following graph shows the relative placement on a 0-100 scale based on the percentage of this segment who strongly agree with this statement:



Base: All respondents (N=1,200)

PARTICIPATION IN ARTS AND CULTURE ACTIVITIES



KEY FINDINGS:

PARTICIPATION IN ARTS AND CULTURE ACTIVITIES

- What kinds of activities do Manitobans enjoy? Museum or historic sites and live music top the list. More than 80 per cent say they have enjoyed these in their lifetimes. About three-quarters have attended a festival and a slightly smaller proportion have watched a live theatre performance. Manitobans are significantly more likely to have participated in these activities within the province than elsewhere.
- Although the proportion of Manitobans who have taken parts in arts activities over the course of their lifetimes is fairly high, significant proportions say they are going to these less now than in the past. This ranges from three-in-ten (for museums) and nearly four in ten (for live theatre) who say they are going less often today compared to two years ago.
- When it comes to free cultural programming, Manitobans are most likely to have visited a Folklorama pavilion, activities in Old Market Square during the Winnipeg Fringe Festival and free concerts at the Forks. Cultural Champions and Emerging Explorers are the two segments most likely to have taken part in these types of events.
- Manitobans' participation in personal artistic and cultural endeavours lags somewhat behind watching or playing sports. Nearly nine-in-ten have visited a pro sports event whereas only about three-quarters say they have attended a craft fair or visited a piece of public art. Emerging Explorers are more likely than other segments to have taken part in activities such as playing music, painting or participating in an event with their own cultural group.

KEY FINDINGS

ATTENDANCE

- **Live theatre:** The highest proportion of Manitoba theatre-goers (79%, including 36% within the past two years) have attended Rainbow Stage at some point; however, a slightly higher proportion (40%) have attended RMTTC Mainstage or Warehouse within the past two years.
- **Live music:** More than eight-in-ten Manitobans who have attended a live music event have done so at an arena concert (92%), at a smaller theatre-style venue (84%) or in a bar or licensed venue (81%).
- **Visual art:** Nine-in-ten art gallery attendees have visited the WAG at some point in their lives, including nearly half (47%) who have done so in the past two years. Visitation to other galleries in the province is significantly lower.
- **Museums/historic sites:** The vast majority of museum-goers in the province have been to the Manitoba Museum, Lower Fort Garry or a local museum focusing on a specific community's history. Although fewer than six-in-ten have been to the Canadian Human Rights Museum, a significant proportion (44%) have gone in the past two years.
- **Live dance:** Among those who have attended live dance, the majority (70%) have attended a performance by the Royal Winnipeg Ballet. A significant proportion mention attending live dance events featuring a family member or members of a cultural group.
- **Film festivals/screenings:** Altogether, only about one-third of Manitobans have attended a film festival or screening. Those that have are most likely to have seen films at a film festival or the Winnipeg Art Gallery.

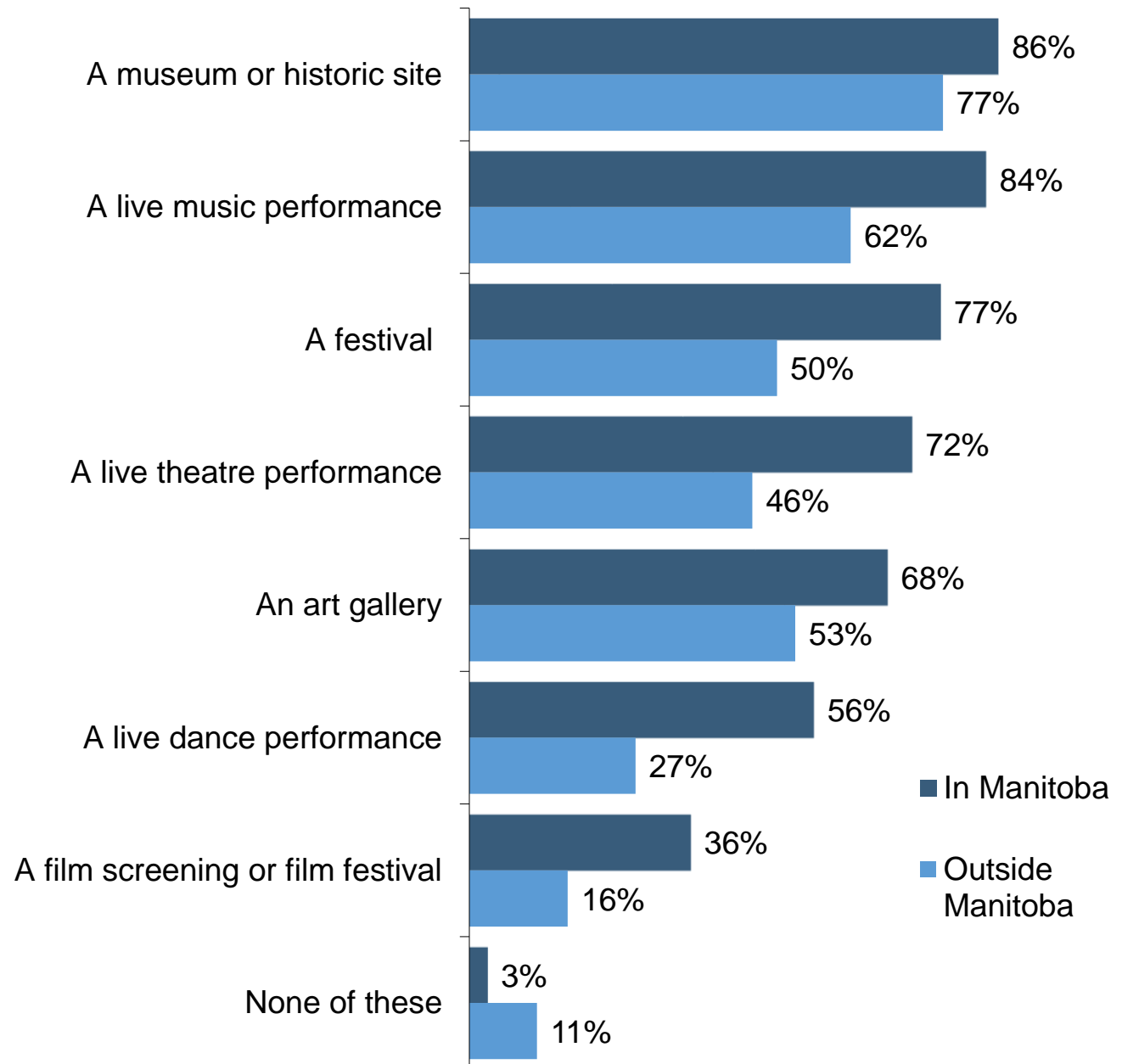
MANITOBANS MOST LIKELY TO HAVE ATTENDED MUSEUMS AND LIVE MUSIC

ARTS ATTENDANCE IN AND OUTSIDE MANITOBA

Q2-3. "Which of the following activities have you ever attended or visited
...in Manitoba?
...outside Manitoba?"

Base: All respondents (N=1,200)

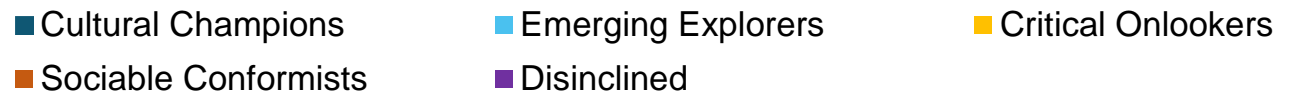
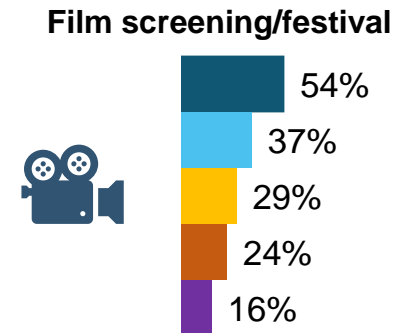
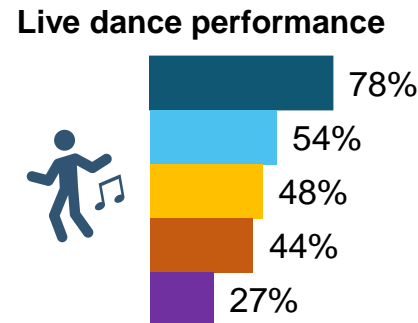
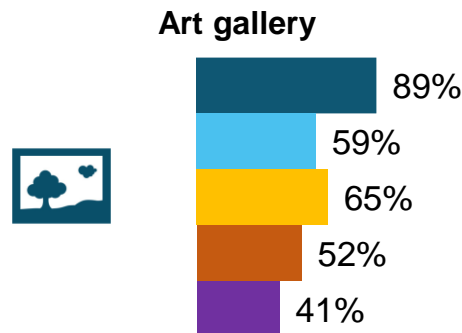
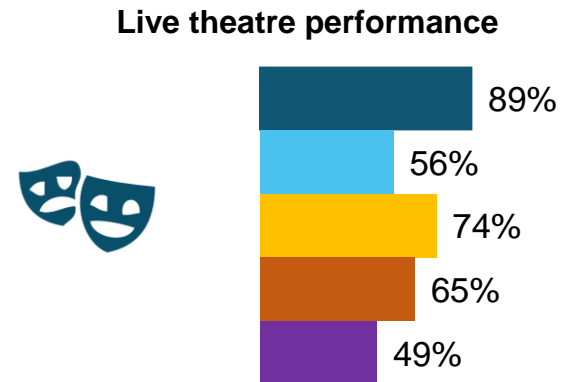
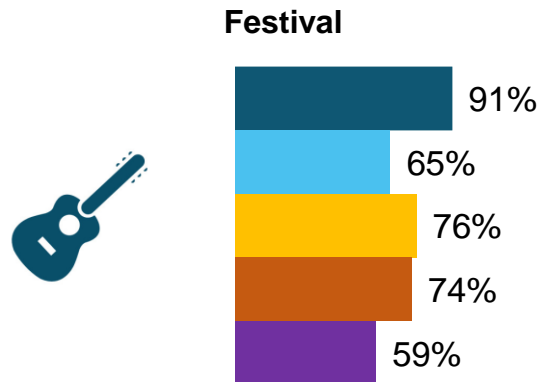
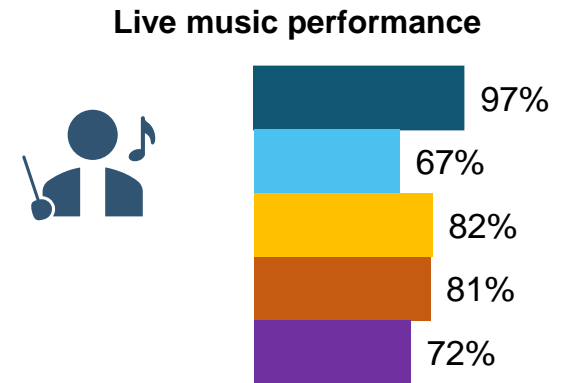
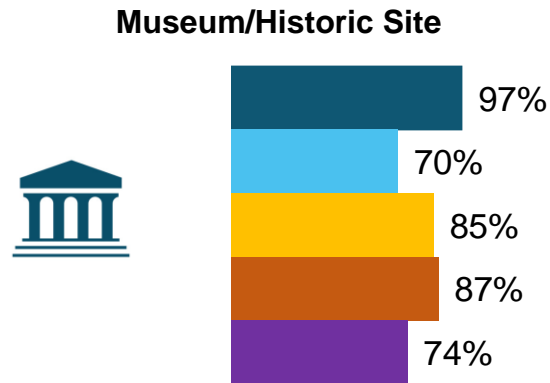
% who have ever attended or visited...



CULTURAL CHAMPIONS ARE MORE LIKELY TO ENGAGE IN ALL LOCAL ACTIVITIES

ARTS ATTENDANCE IN MANITOBA BY SEGMENTS

Q2. "Which of the following activities have you ever attended or visited in Manitoba?"

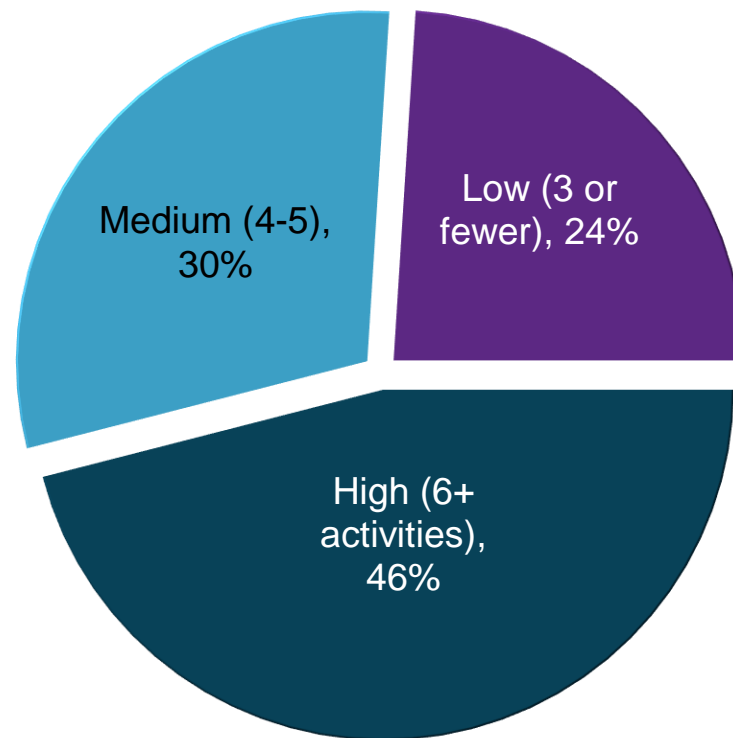


Base: All respondents (N=1,200)

NEARLY ONE-HALF HAVE ATTENDED SIX OR MORE ACTIVITIES HERE

ARTS ENGAGEMENT IN MANITOBA

Q2. "Which of the following activities have you ever attended or visited In Manitoba?"



	Cultural Champions	Emerging Explorers	Critical Onlookers	Sociable Conformists	Disinclined
High (6+)	75%	32%	37%	28%	17%
Med. (4-5)	19%	31%	40%	42%	33%
Low (<4)	6%	36%	23%	30%	51%

Those more likely to have taken part in at least six activities include

- Winnipeg residents (52% vs. 38% among those in rural Manitoba)
- Women (51% vs. 41% among men)
- Older adults (56% among those 55+ vs. 36% among those 18-34)
- Higher-income earners (56% among those earning \$100K+) and those with higher levels of education (53% among those with a university degree)

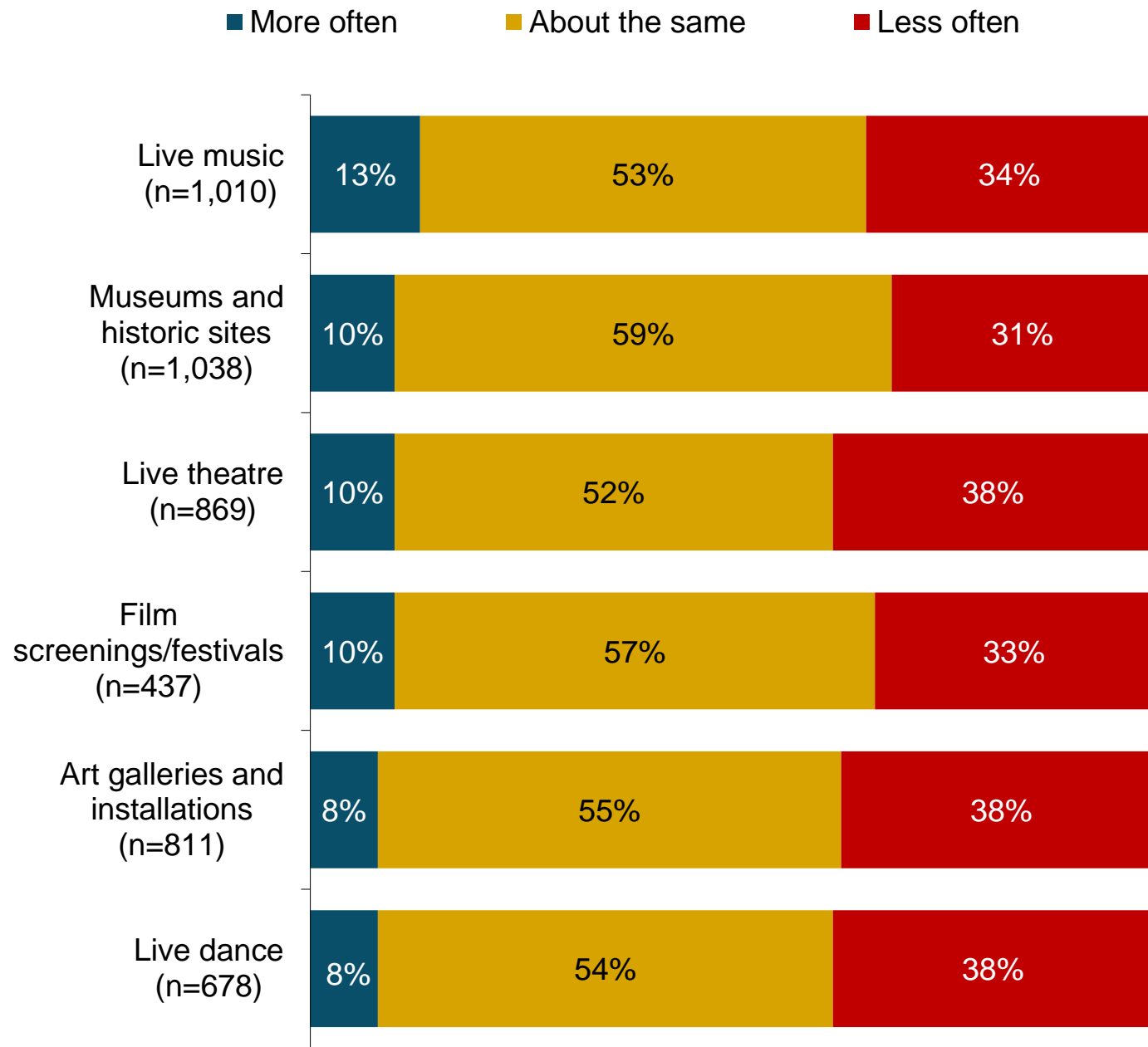
Base: All respondents (N=1,200)

FOR HALF OF RESPONDENTS, ARTS ATTENDANCE HOLDS STEADY

CHANGE IN FREQUENCY OF ARTS ATTENDANCE

Q.5, 7, 9, 13, 15. "Compared to two years ago, would you say you are now attending _____ in Manitoba more often, about the same amount or less often?"

Base: Respondents who have attended any of these events in Manitoba.



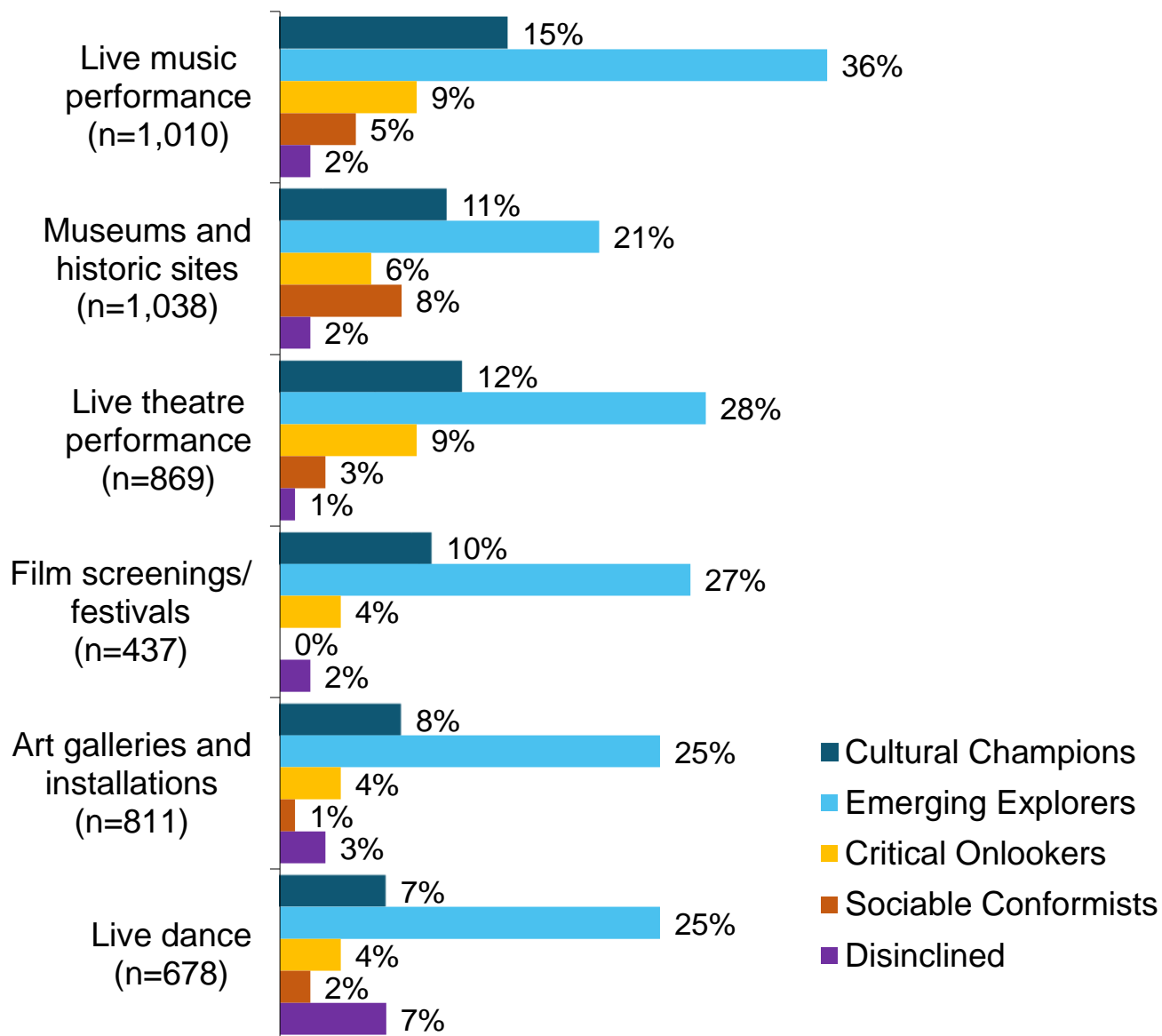
EMERGING EXPLORERS MORE LIKELY TO BE TAKING PART IN ACTIVITIES TODAY VS. TWO YEARS AGO

FREQUENCY OF PARTICIPATION, BY SEGMENT

Q.5, 7, 9, 13, 15. "Compared to two years ago, would you say you are now attending _____ in Manitoba more often, about the same amount or less often?"

Base: Respondents who have attended any of these events in Manitoba.

% who say they are attending this type of event/activity more often

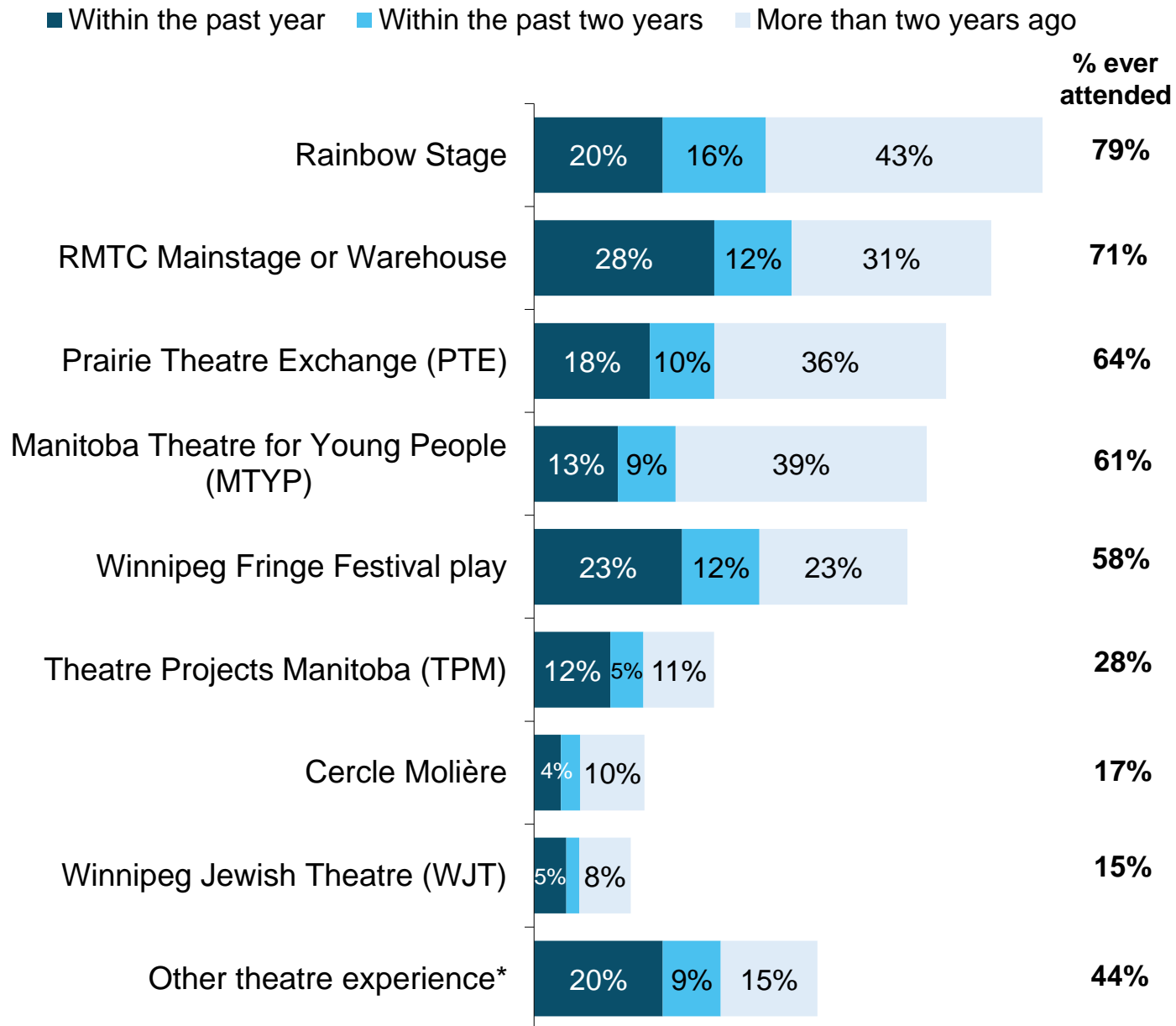


EIGHT-IN-TEN HAVE BEEN TO RAINBOW STAGE; ATTENDEES ARE MORE LIKELY TO ATTEND RMTC, FRINGE RECENTLY

ATTENDANCE AT LIVE THEATRE EVENTS

Q4. "Please indicate which of the following live theatre activities/events you have attended, including the last time you attended a performance of each of these in Manitoba."

Base: Respondents who have attended live theatre in Manitoba (n=869)



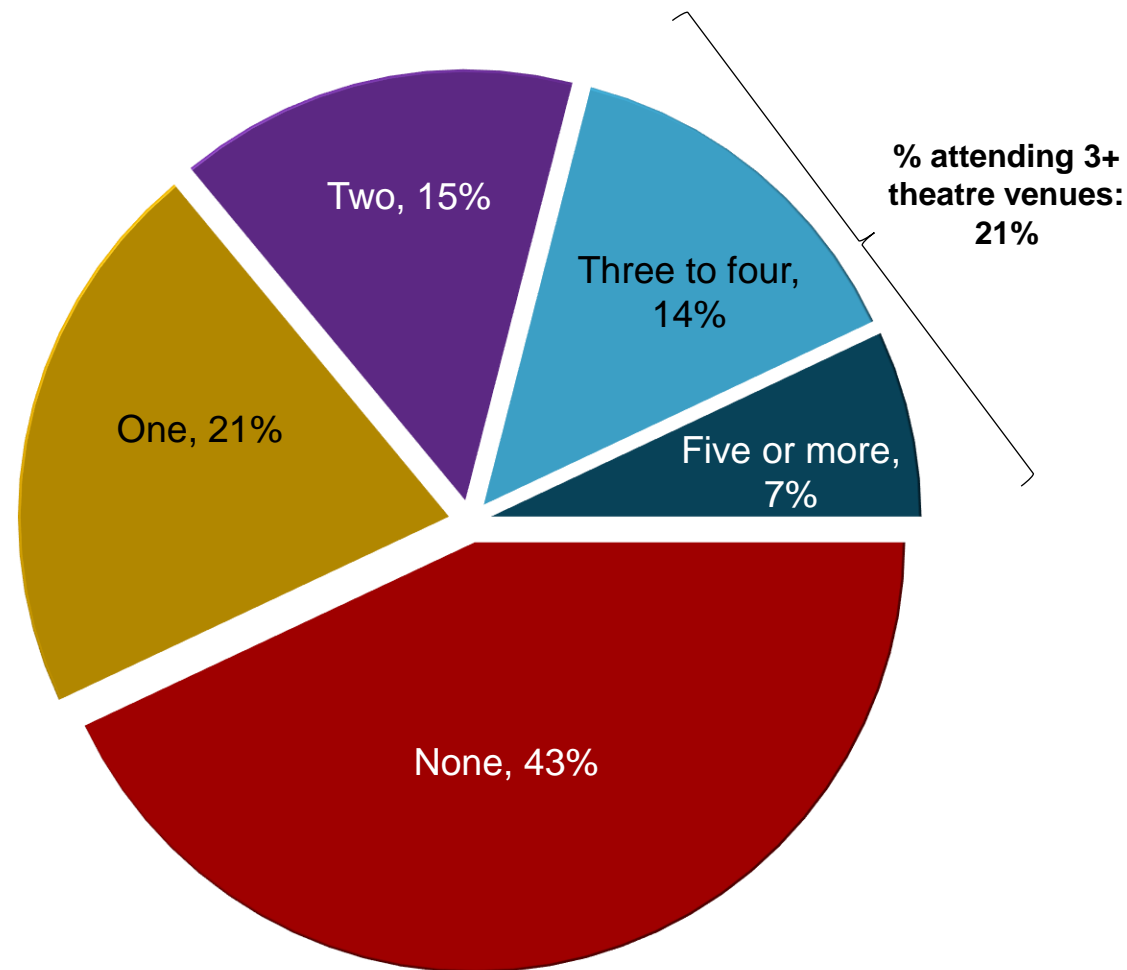
*Other experiences mentioned include: church/community theatre (13%), high school theatre (12%), major stage musicals/events (6%), other local independent theatre (5%), university theatre and dinner theatre (3% each).

ONE-QUARTER OF THEATRE ATTENDEES HAVE BEEN TO THREE OR MORE VENUES IN THE PAST YEAR

PAST-YEAR ATTENDANCE, LIVE THEATRE VENUES

Q4. "Please indicate which of the following live theatre activities/events you have attended, including the last time you attended a performance of each of these in Manitoba."

Base: Respondents who have attended live theatre in Manitoba (n=869)



Those most likely to have attended three or more different **live theatre venues** within the past year include:

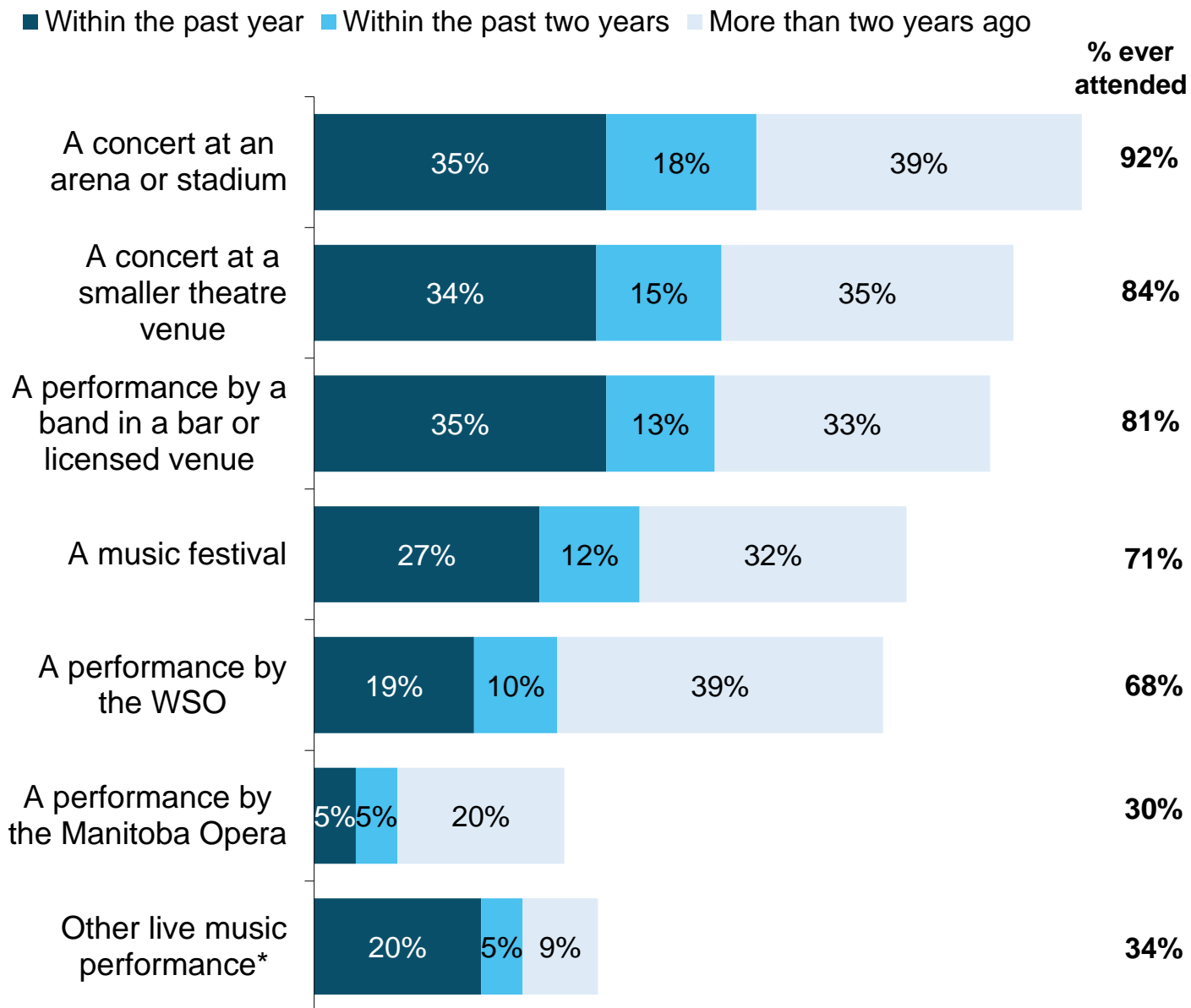
- Cultural Champions (32%)
- Winnipeg residents (24%, rising to 36% among those living in the Core)
- Younger adults aged 18-34 (30% vs. 17% among those 35-54 and 18% among those 55+)

NINE-IN-TEN HAVE BEEN TO A LARGE CONCERT

ATTENDANCE AT LIVE MUSIC EVENTS

Q6. "Please indicate the last time you attended each of the following types of live music performances in Manitoba."

Base: Respondents who have attended live music in Manitoba (n=1,010)

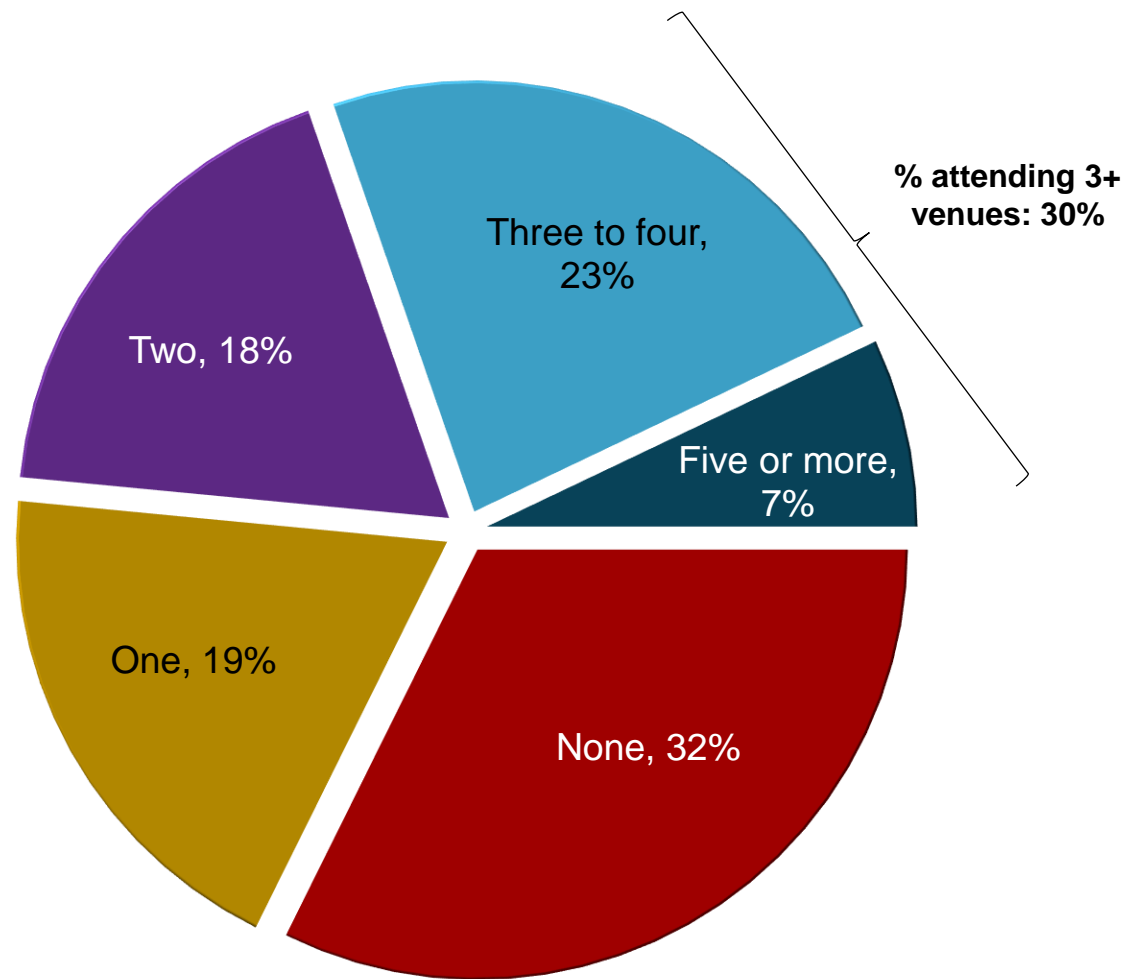


*Other live music performances mentioned include: street festival/free outdoor concert (12%); a specific artist where the location wasn't specified, a house concert, a school music performance, another type of community performance (4% each) and a church performance (3%).

THREE-IN-TEN MUSIC DEVOTEES ATTENDED AT LEAST THREE SHOWS IN THE PAST YEAR

PAST-YEAR ATTENDANCE, TYPES OF LIVE MUSIC

Q6. "Please indicate the last time you attended each of the following types of live music performances in Manitoba."



Those most likely to have attended three or more different venues to watch **live music** in the past year include:

- Cultural Champions (41%)
- Younger adults (40% among those 18-34 vs. 21% among those 55+)
- Indigenous Manitobans (40% vs. 30% among non-Indigenous)

Base: Respondents who have attended live music in Manitoba (n=1,010)

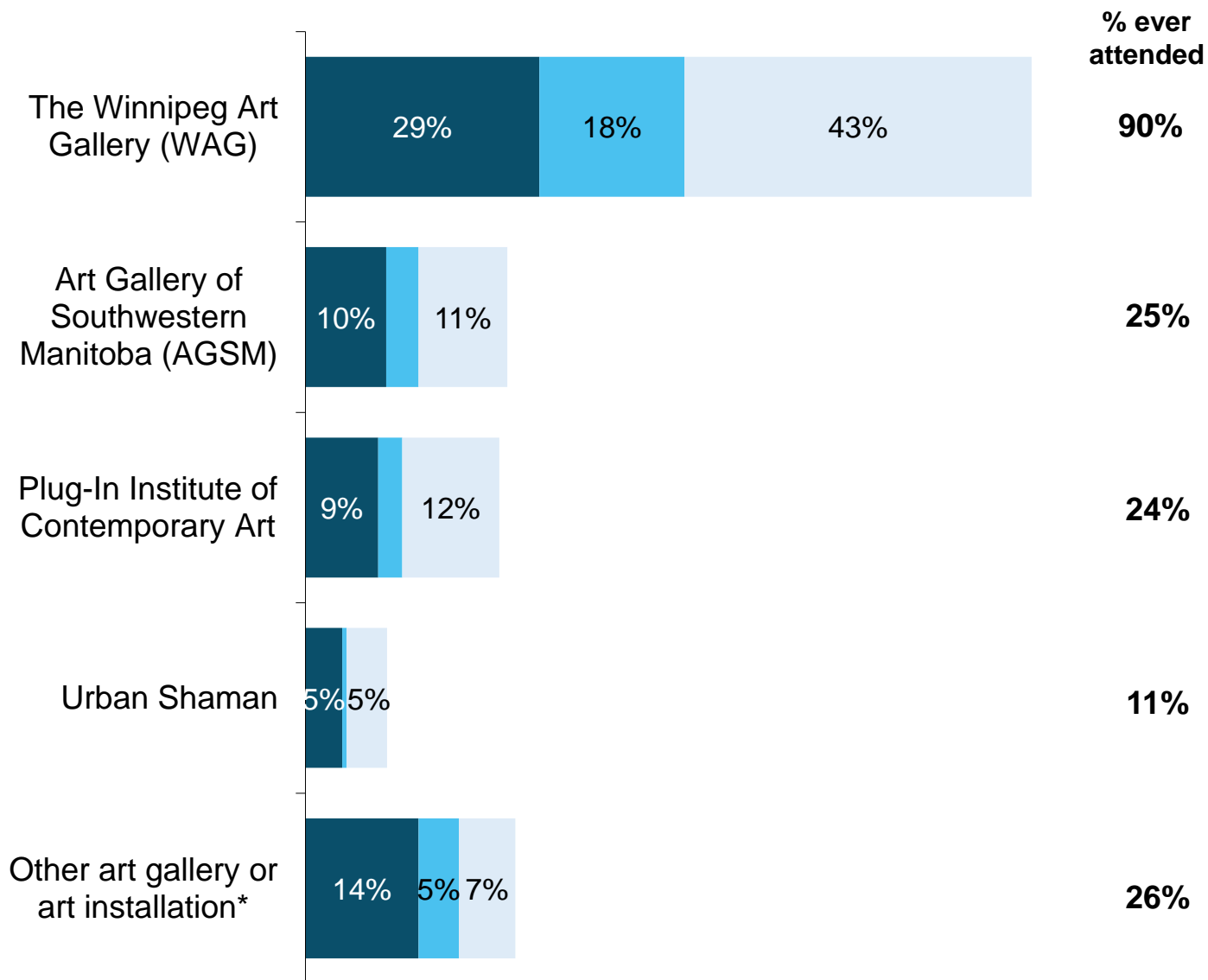
WAG MOST FREQUENTED ART GALLERY

ART GALLERY ATTENDANCE

Q8. "Please indicate the last time you attended each of the following art galleries."

Base: Respondents who have attended art galleries in Manitoba (n=811)

■ Within the past year ■ Within the past two years ■ More than two years ago



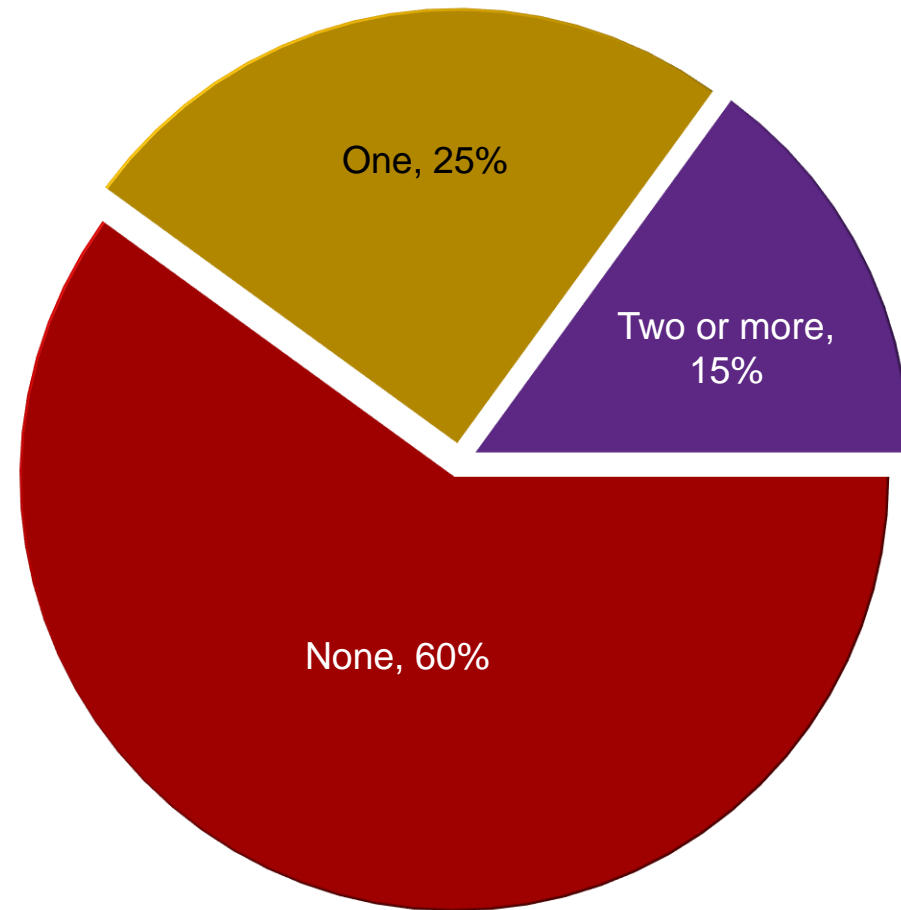
*Other art galleries/installations mentioned include: rural/community gallery (7%); exhibit in a museum or other public venue (6%); other Winnipeg art gallery (e.g. Crea8ery, Pulse Gallery, etc.), as part of an event such as Nuit Blanche (3% each) or a university art gallery (2%).

MORE THAN HALF OF THOSE WHO HAVE BEEN TO A GALLERY HAVEN'T GONE IN THE PAST YEAR

PAST-YEAR ATTENDANCE, ART GALLERIES

Q8. "Please indicate the last time you attended each of the following art galleries."

Base: Respondents who have attended art galleries in Manitoba (n=811)



Those most likely to have attended two or more **art galleries or installations** in the past year include:

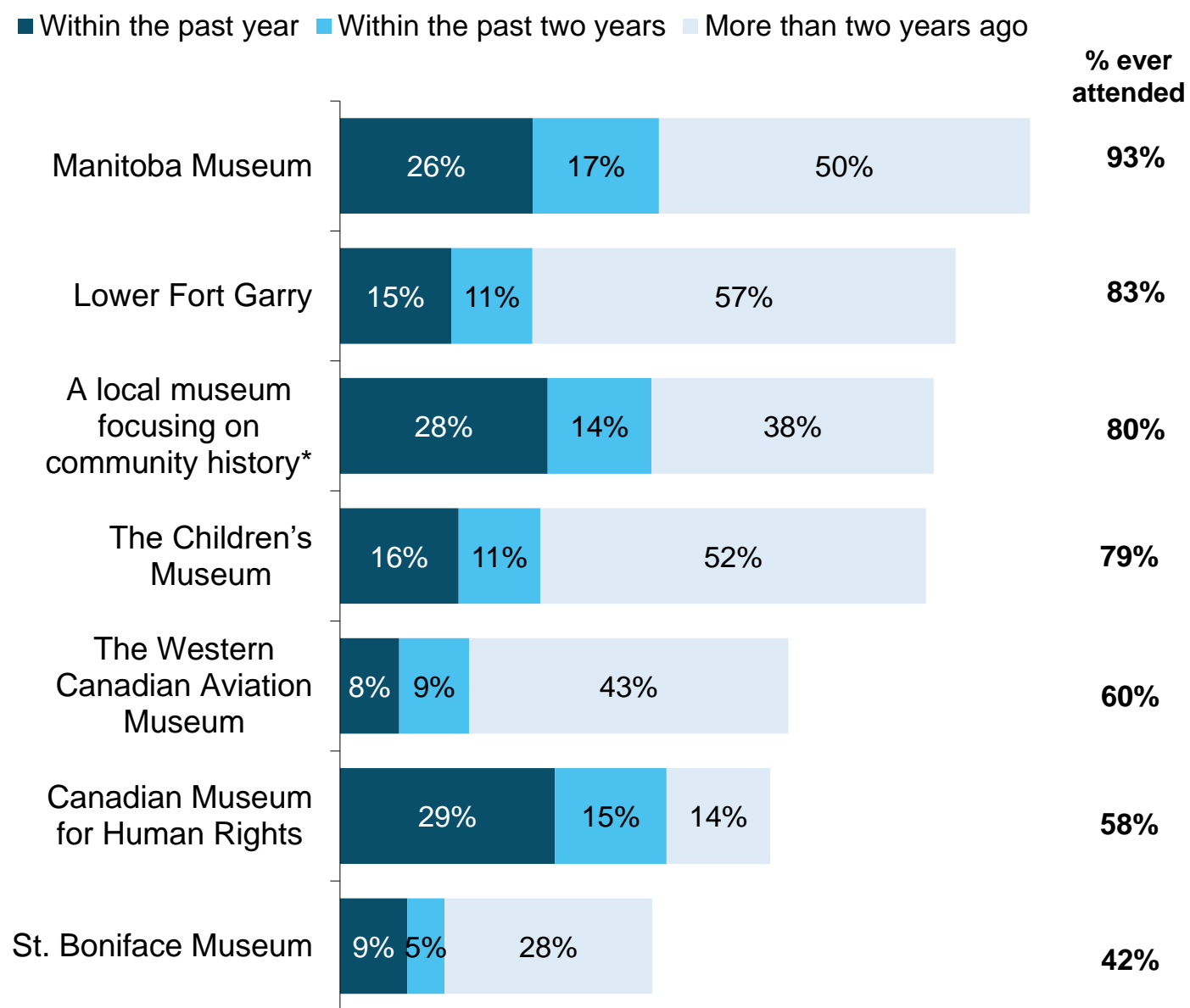
- Emerging Explorers (40%) and Cultural Champions (20%)
- Winnipeg Core area residents (28% vs. 11% among those in northeast and southeast Winnipeg)
- Younger adults aged 18-34 (22% vs. 11% among those 55+)
- Indigenous Manitobans (27% vs. 14% among non-Indigenous residents)

MANITOBA MUSEUM IS MOST VISITED, BUT A HIGHER PROPORTION HAVE BEEN TO CMHR RECENTLY

VISITATION TO LOCAL MUSEUMS AND HISTORIC SITES

Q10. "Please indicate the last time you attended each of the following museums or historic sites."

Base: Respondents who have attended museums or historic sites in Manitoba (n=1,038)



*Includes a variety of museums throughout Manitoba dedicated to local history (e.g. Dalnavert, Seven Oaks House, Daly House, etc.)

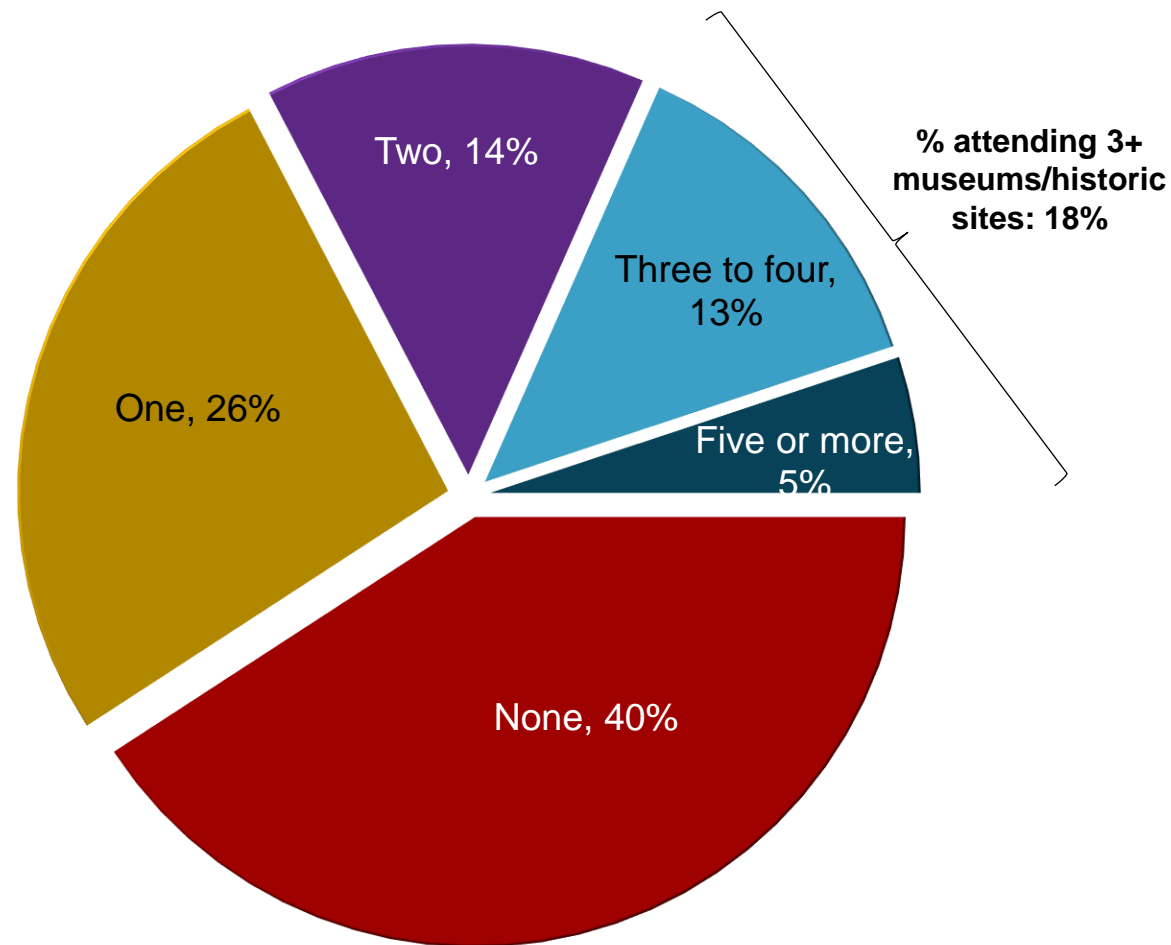
**Other mentions include natural history sites, such as the petroforms (4%), agricultural museums (2%), temporary/travelling exhibits and the Manitoba Craft Museum (<1% each).

FOUR-IN-TEN HAVE NOT ATTENDED ANY MUSEUMS IN THE PAST 12 MONTHS

PAST-YEAR ATTENDANCE, HISTORIC SITES AND MUSEUMS

Q10. "Please indicate the last time you attended each of the following museums or historic sites."

Base: Respondents who have attended museums or historic sites in Manitoba (n=1,038)



Those who are most likely to have attended three or more different **museums or historic sites** in the past year include:

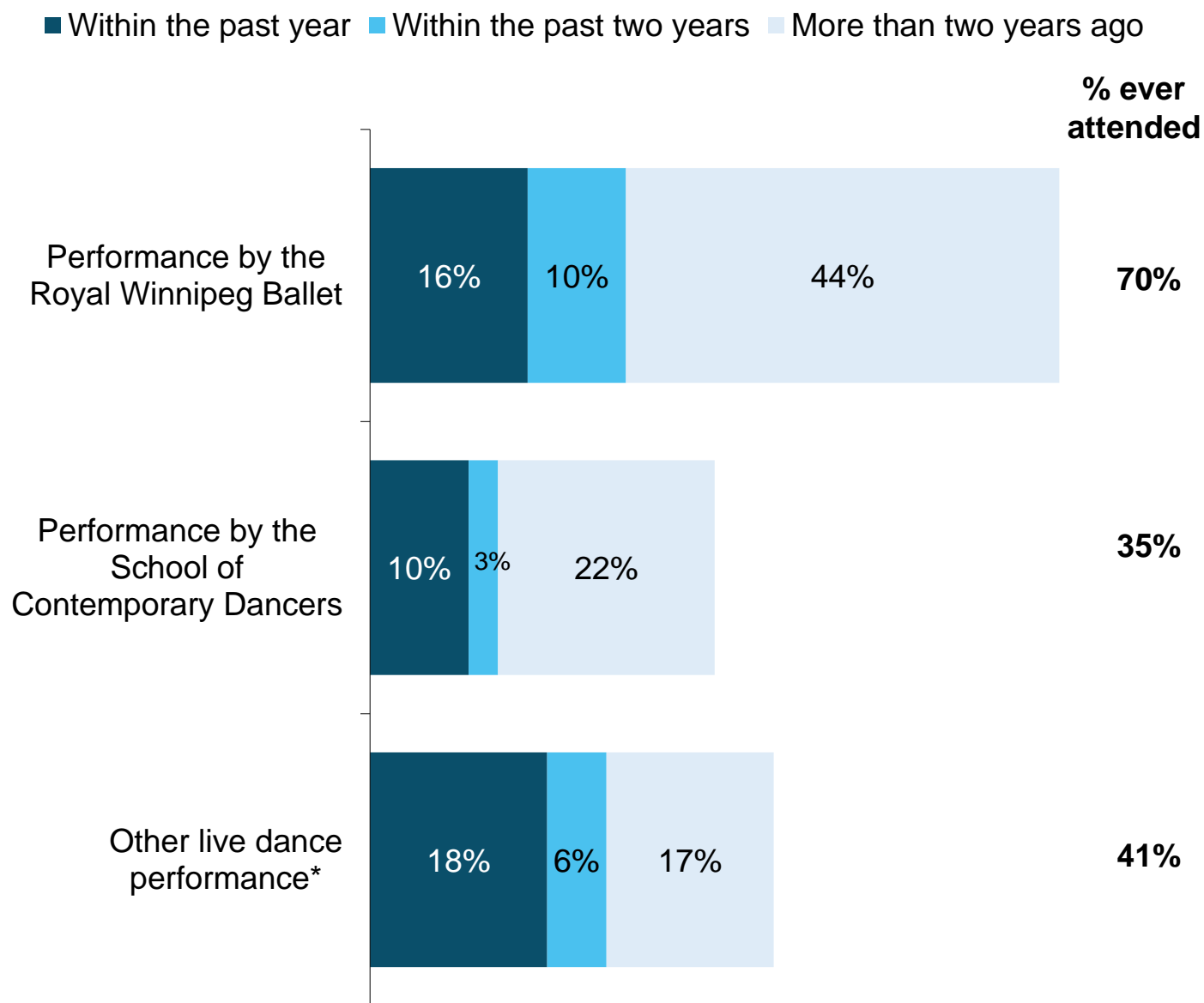
- Emerging Explorers (45%) and Cultural Champions (29%)
- Younger adults (26% among those 18-34 vs. 10% among those 55+)
- Indigenous Manitobans (30% vs. 17% among non-Indigenous residents)
- Those born outside Canada (27% vs. 17% among third-generation or more Canadians)
- Relatively new Winnipeg residents (38% among those who have lived in the city for less than 10 years)
- Those with children at home (25% vs. 11% among those without)

SEVEN-IN-TEN HAVE ATTENDED RWB, BUT LIVE DANCE ATTENDANCE IS LESS FREQUENT

DANCE ATTENDANCE

Q12. "Please indicate the last time you attended each of the following types of live dance performance."

Base: Respondents who have attended live dance performances in Manitoba (n=678)

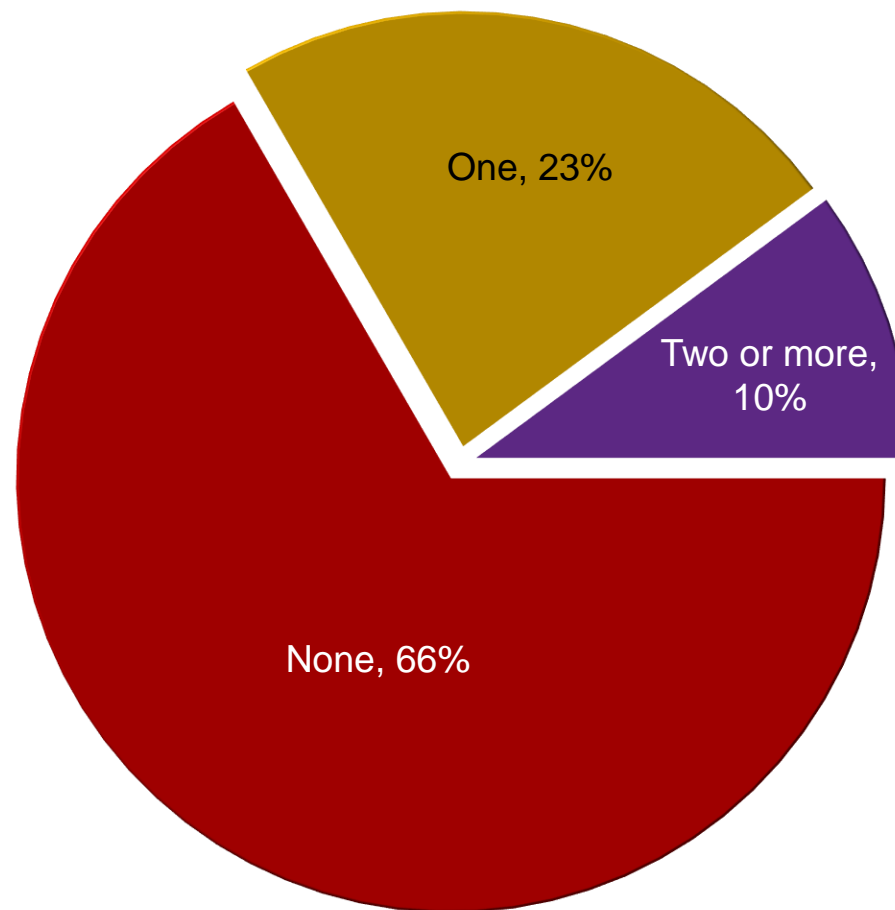


*Other live dance performances mentioned include cultural performances (18%), performances by a child or other family member (16%), as part of a live theatre or music performance (5%) or as part of another type of event (<1%).

TWO-THIRDS OF DANCE ATTENDEES HAVE NOT GONE IN THE PAST 12 MONTHS

PAST-YEAR ATTENDANCE, LIVE DANCE VENUES

Q12. "Please indicate the last time you attended each type of the following types of live dance performance."



Base: Respondents who have attended live dance performances in Manitoba (n=678)

Those most likely to have attended two or more **live dance venues** in the past year include:

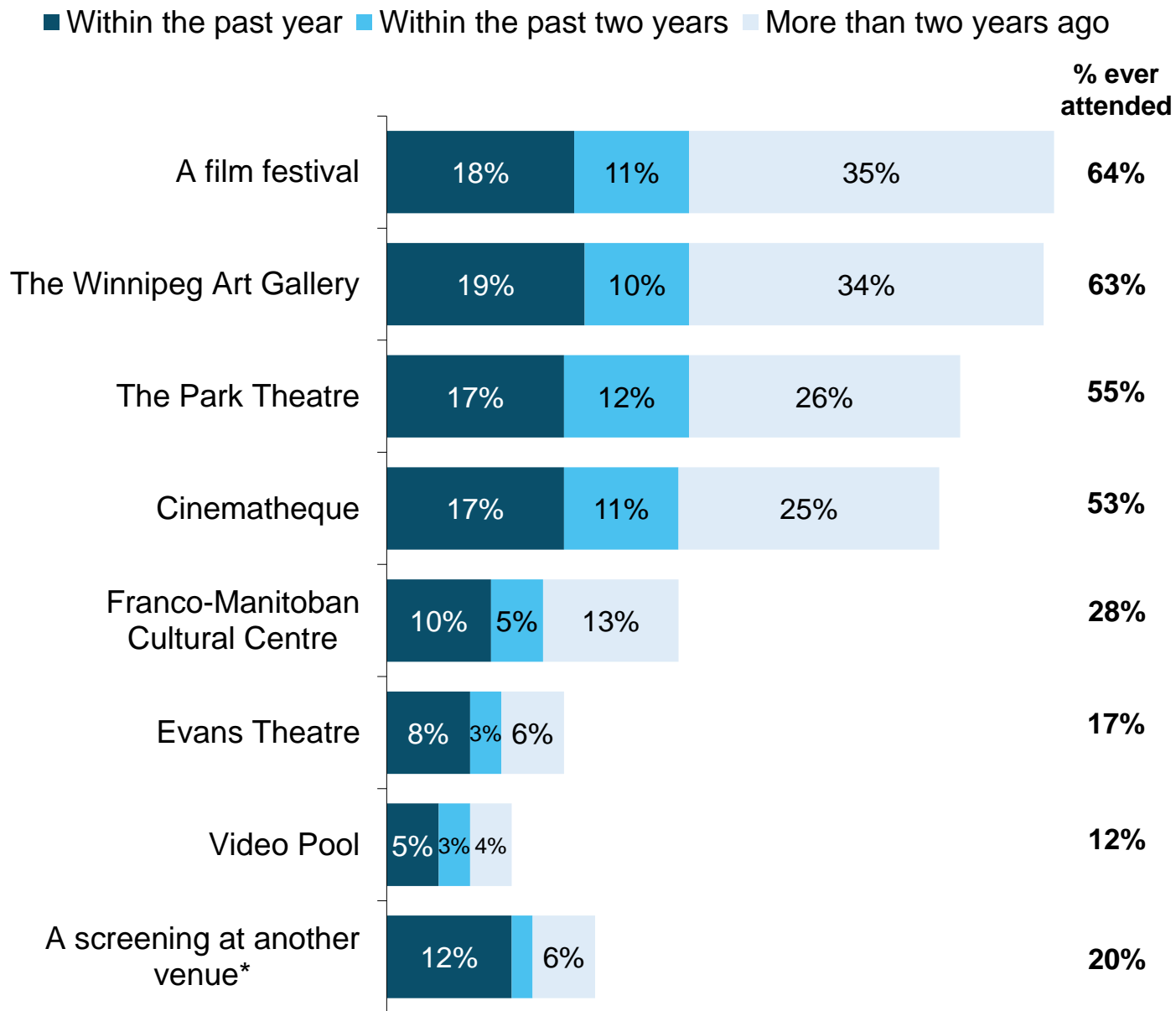
- Emerging Explorers (41%)
- Younger adults (19% among those 18-34 vs. 5% among those 55+)
- Those with lower household incomes (17% earning <\$50K)
- Indigenous Manitobans (25% vs. 9% among non-Indigenous)
- First-generation Canadians (20%)

RESIDENTS ARE MOST LIKELY TO HAVE GONE TO A FILM FESTIVAL OR SCREENING AT THE WAG

FILM FESTIVAL/SCREENING ATTENDANCE

Q14. "Please indicate the last time you attended each of the following locations for a film screening."

Base: Respondents who have attended a film screening in Manitoba (n=437)



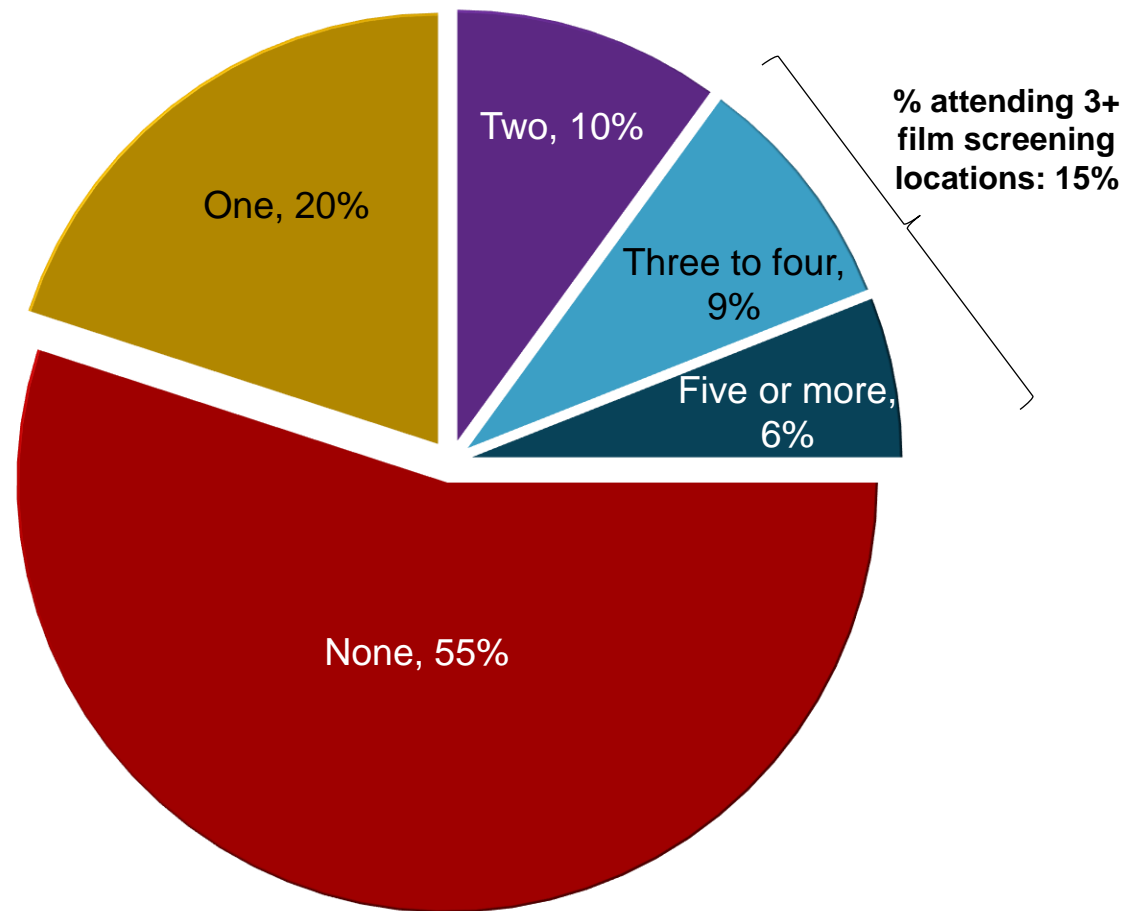
*Other venues mentioned include a movie theatre/drive-in (12%), at a university or cultural centre (5%), an outdoor screening of a film (2%) or as part of another cultural event (1%).

MORE THAN ONE-HALF WHO HAVEN'T BEEN TO A FILM SCREENING HAVE NOT GONE RECENTLY

PAST-YEAR ATTENDANCE, FILM SCREENINGS

Q14. "Please indicate the last time you attended each of the following locations for a film screening."

Base: Respondents who have attended a film screening in Manitoba (n=437)



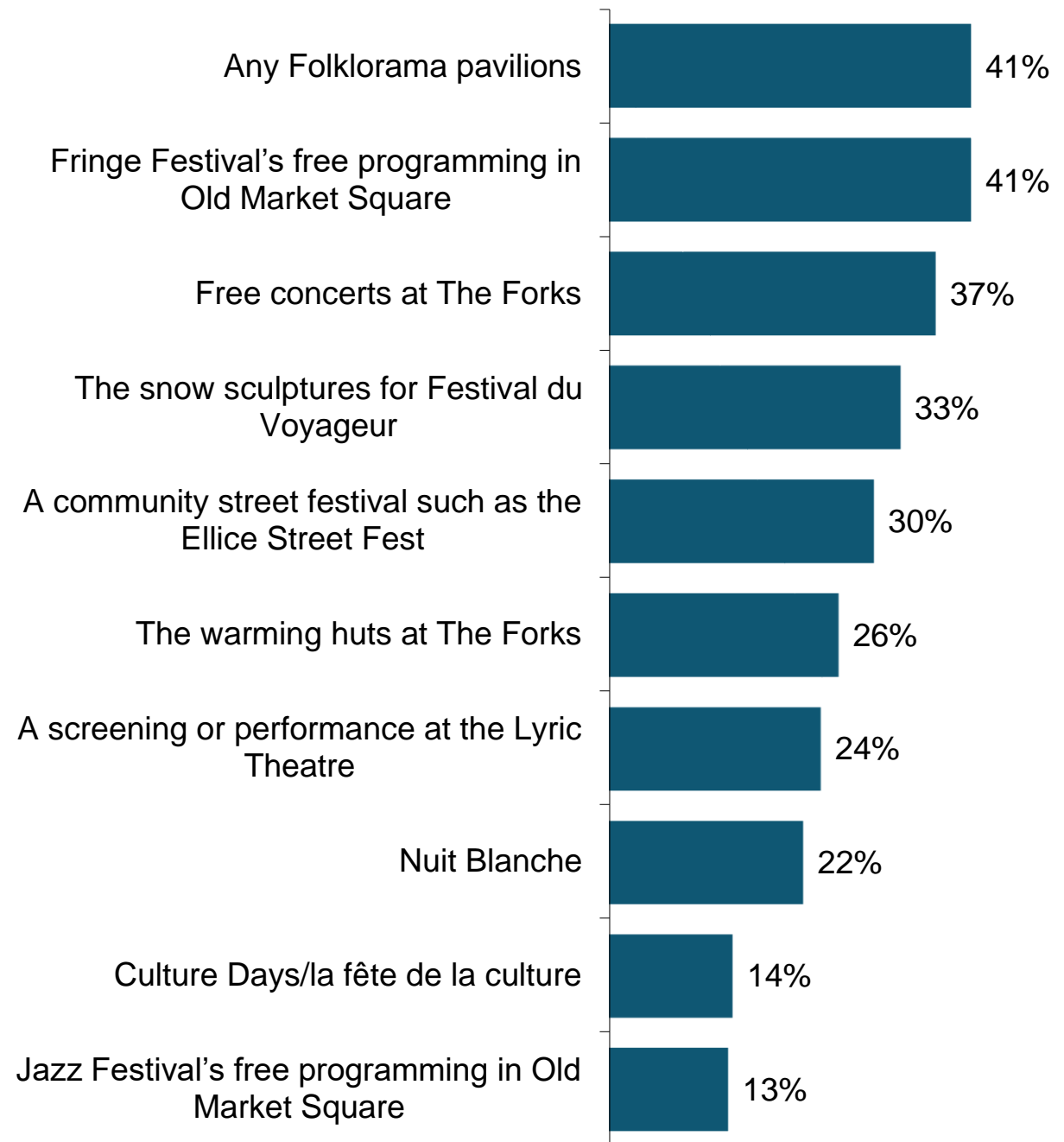
Those most likely to have attended three or more different **film screening locations** in the past year include:

- Emerging Explorers (55%)
- Younger adults (26% among those 18-34 vs. 6% among those 55+)
- Those born outside Canada (30% vs. 12% among third-generation or more Canadians)

FREE EVENTS: MORE THAN FOUR-IN-TEN HAVE ATTENDED FOLKLORAMA, FRINGE FESTIVAL FREE PROGRAMMING

OTHER EVENT ATTENDANCE

Q16. "Please indicate which of the following you have attended or visited in the past two years."



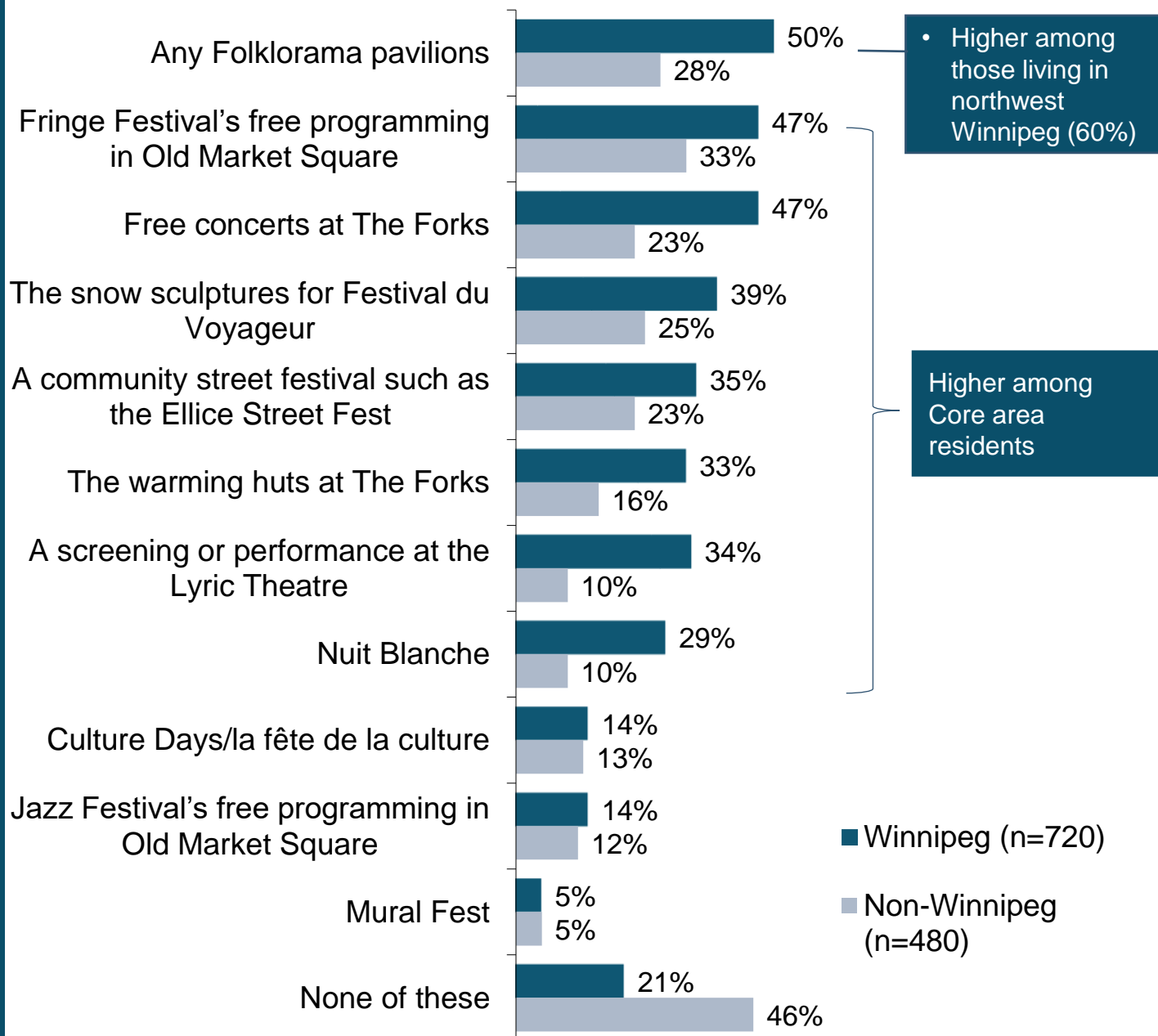
Base: All respondents (N=1,200)

WINNIPEG RESIDENTS – PARTICULARLY IN THE CORE – ARE MOST LIKELY TO ATTEND FREE EVENTS

OTHER EVENT ATTENDANCE, BY REGION

Q16. “Please indicate which of the following you have attended or visited in the past two years.”

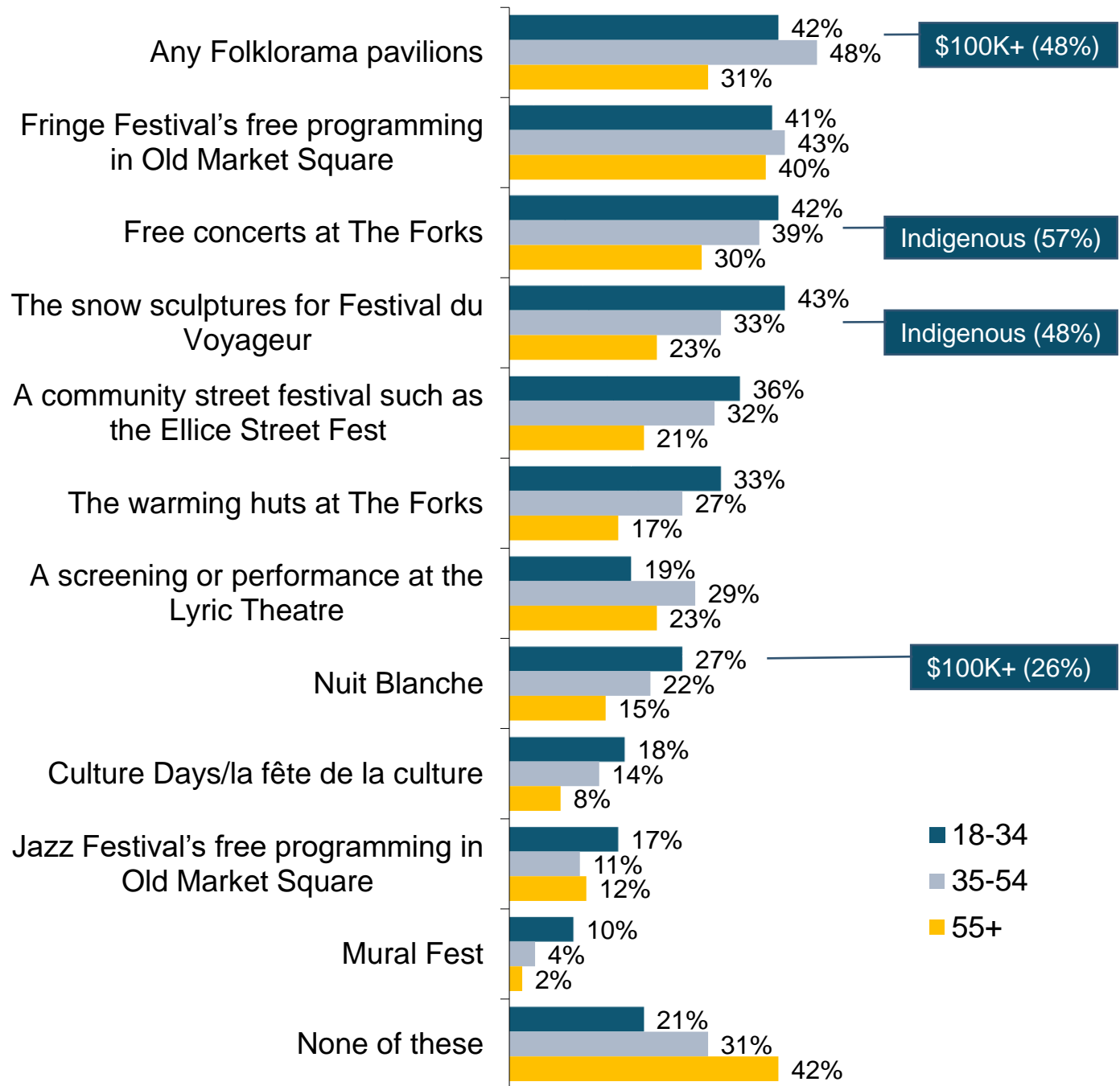
Base: All respondents (N=1,200)



YOUNGER RESIDENTS ARE MORE LIKELY TO ATTEND FREE EVENTS

OTHER EVENT ATTENDANCE, BY AGE

Q16. "Please indicate which of the following you have attended or visited in the past two years."

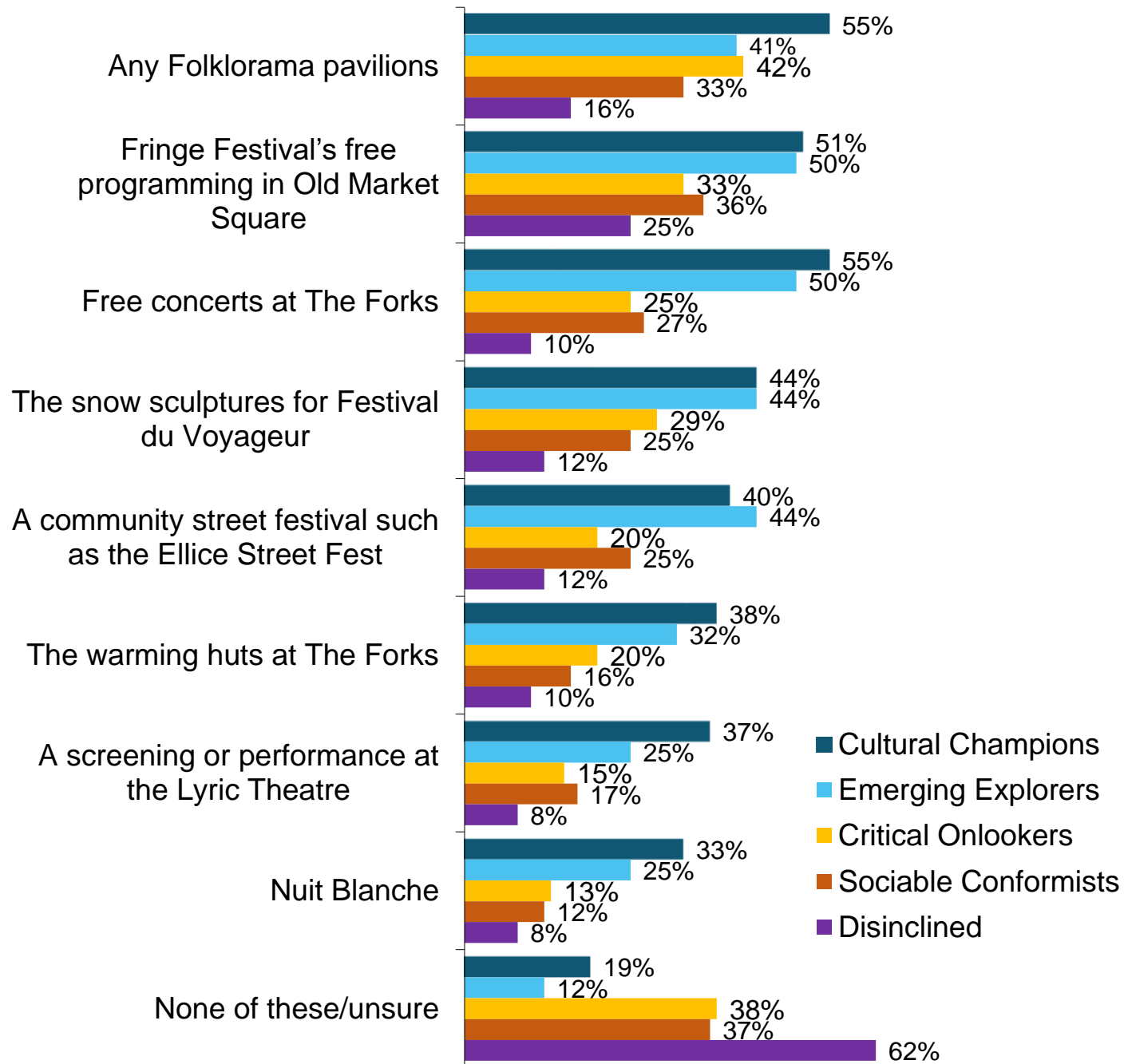


Base: All respondents (N=1,200)

CULTURAL CHAMPIONS, EMERGING EXPLORERS MOST LIKELY TO ATTEND FREE EVENTS

OTHER EVENT ATTENDANCE, BY SEGMENT

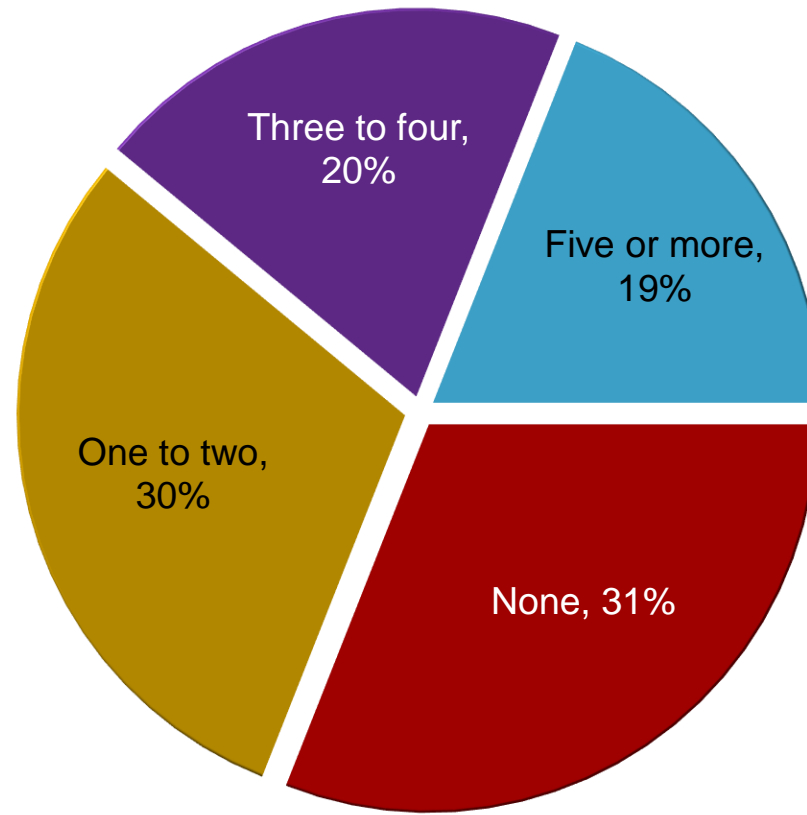
Q16. "Please indicate which of the following you have attended or visited in the past two years."



Base: All respondents (N=1,200)

NEARLY FOUR-IN-TEN HAVE BEEN TO AT LEAST THREE FREE PUBLIC EVENTS IN THE PAST TWO YEARS

Q16. "Please indicate which of the following you have attended or visited in the past two years."



	Cultural Champions	Emerging Explorers	Critical Onlookers	Sociable Conformists	Disinclined
None	19%	12%	38%	37%	62%
1-2	24%	36%	35%	36%	28%
3-4	23%	31%	17%	21%	7%
5+	35%	21%	10%	6%	3%

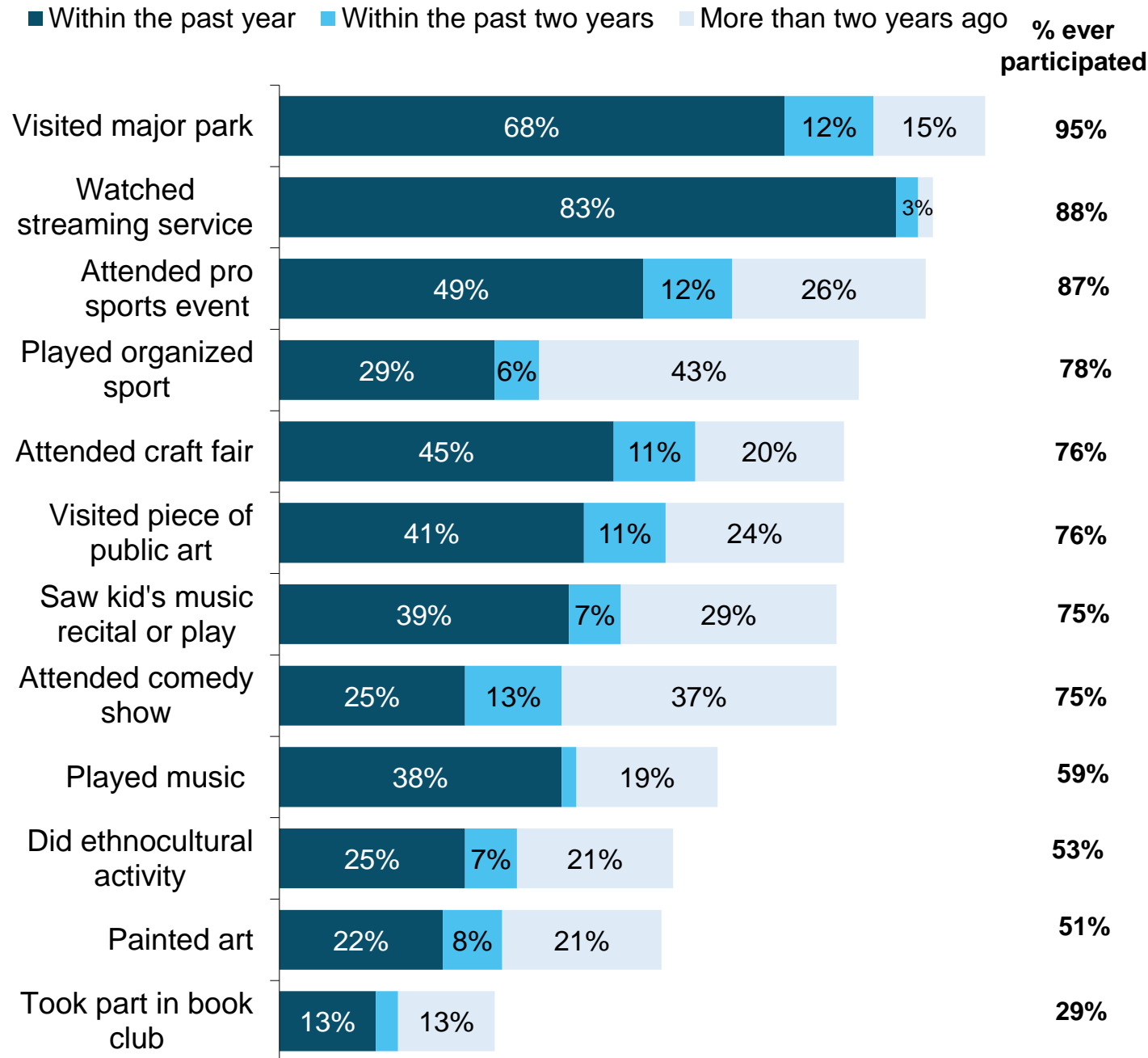
Base: All respondents (N=1,200)

“GATEWAY” ACTIVITIES: CULTURE LAGS BEHIND WATCHING, PLAYING SPORTS

“GATEWAY” ACTIVITY PARTICIPATION

Q17. “Please indicate in the space below when you most recently took part in each of the following activities.”

Base: All respondents (N=1,200)



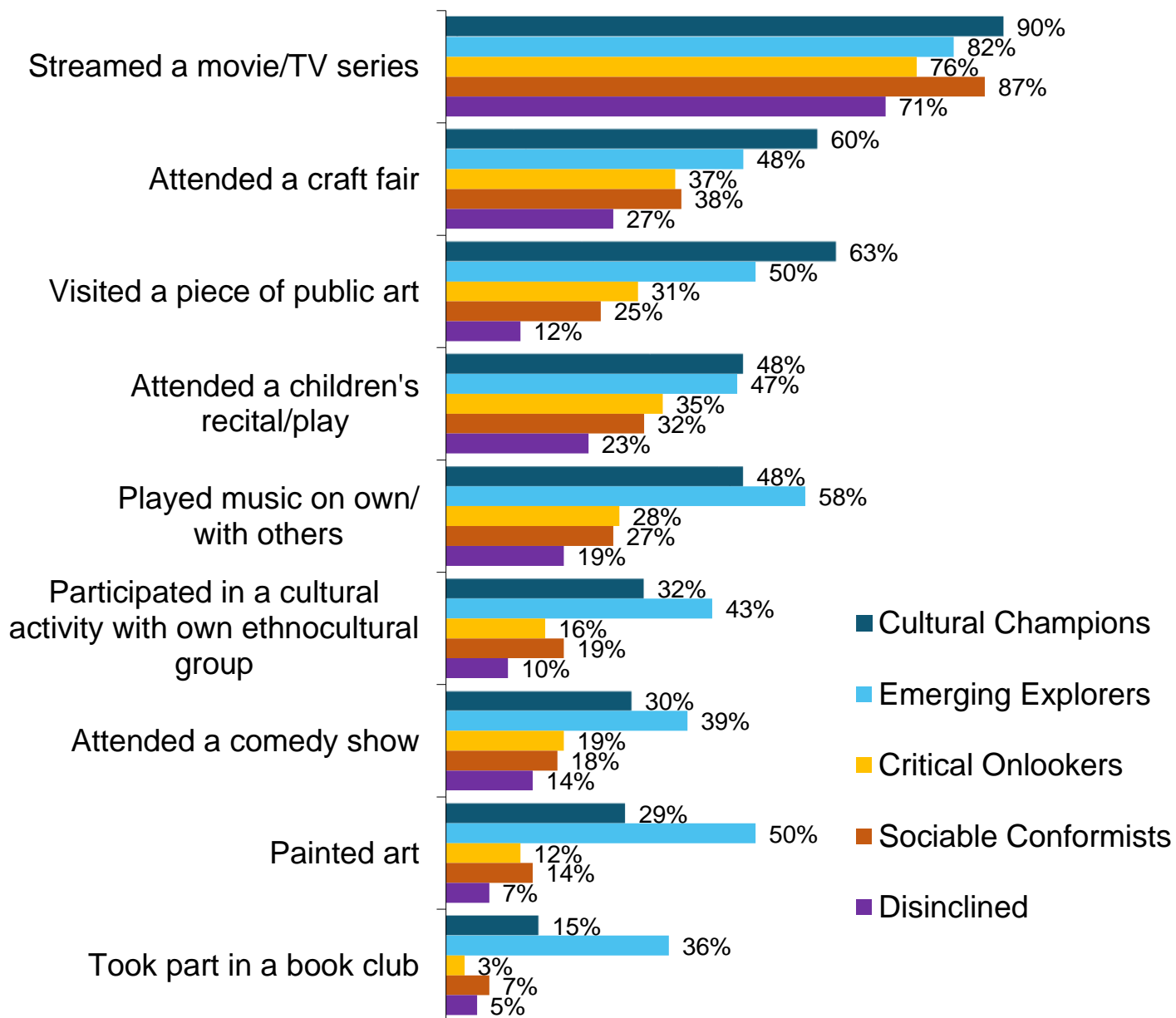
EMERGING EXPLORERS MOST LIKELY TO ENGAGE IN OWN ARTISTIC PURSUITS

PERSONAL ARTS/CULTURE ACTIVITY PARTICIPATION, BY SEGMENT

Q17. "Please indicate in the space below when you most recently took part in each of the following activities."

Base: All respondents (N=1,200)

% who have done this activity in the past year



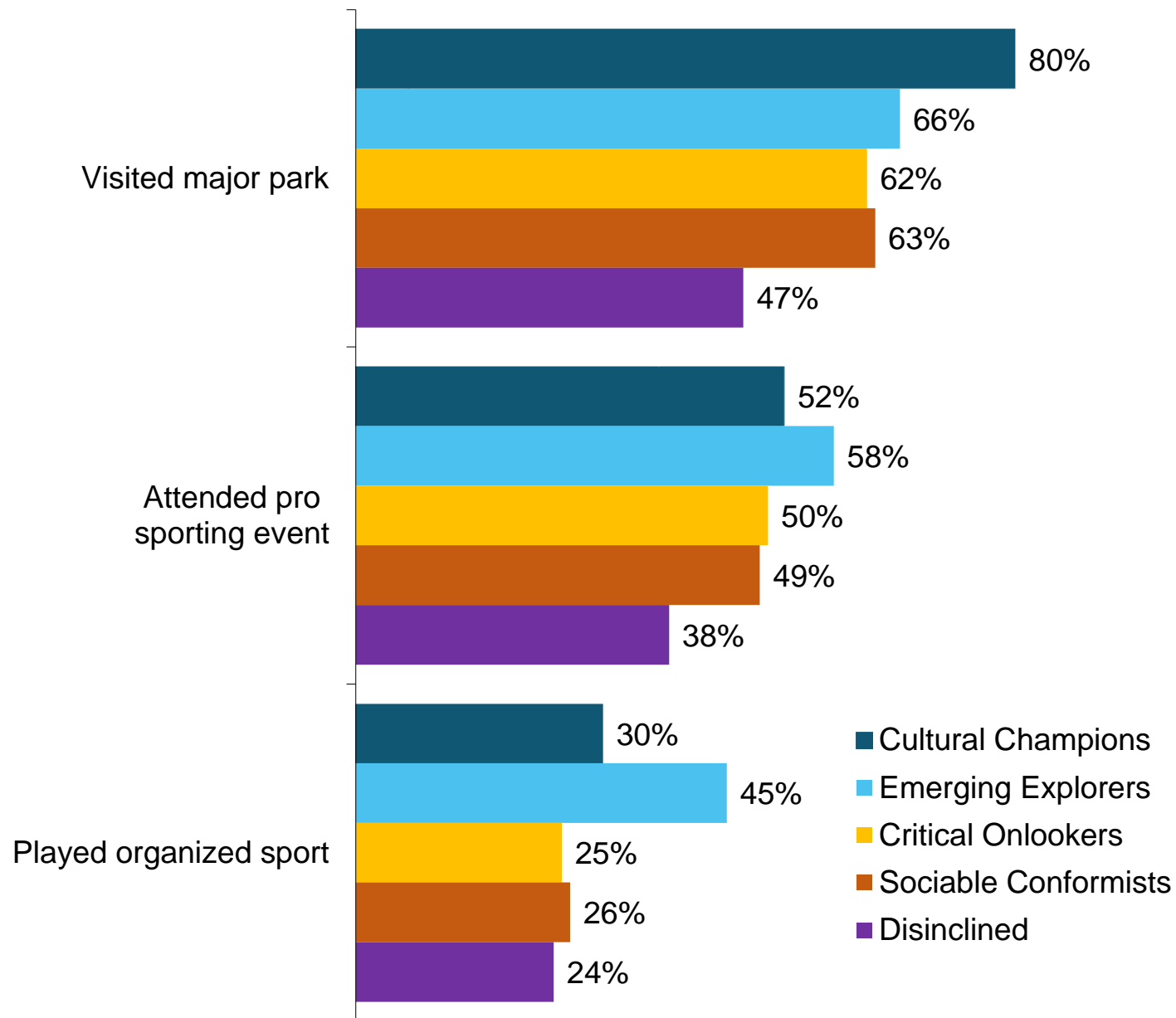
PARTICIPATION IN OTHER TYPES OF ACTIVITIES MIRRORS MORE ARTISTIC ENDEAVOURS

PARTICIPATION IN OTHER TYPES OF ACTIVITIES, BY SEGMENT

Q17. "Please indicate in the space below when you most recently took part in each of the following activities."

Base: All respondents (N=1,200)

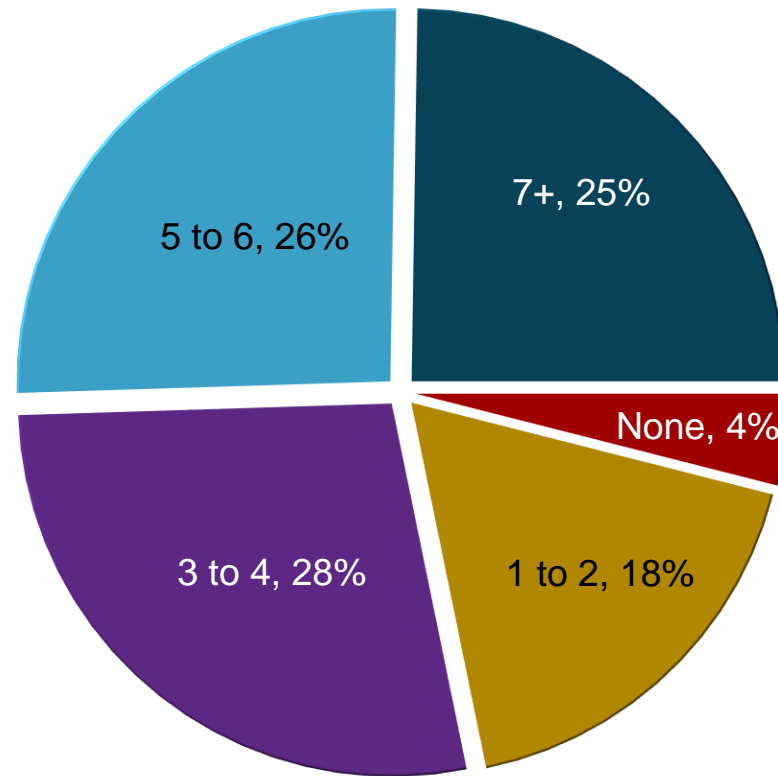
% who have done this activity in the past year



CULTURAL CHAMPIONS, EMERGING EXPLORERS MOST LIKELY TO BE INVOLVED IN MANY ACTIVITIES

PAST-YEAR PARTICIPATION, OTHER ACTIVITIES

Q17. "Please indicate in the space below when you most recently took part in each of the following activities."



	Cultural Champions	Emerging Explorers	Critical Onlookers	Sociable Conformists	Disinclined
None	1%	1%	5%	3%	11%
1 to 2	8%	17%	21%	20%	36%
3 to 4	21%	18%	36%	38%	32%
5 to 6	32%	19%	27%	25%	15%
7+	38%	45%	11%	14%	6%

Base: All respondents (N=1,200)

AWARENESS AND COMMUNICATIONS



KEY FINDINGS:

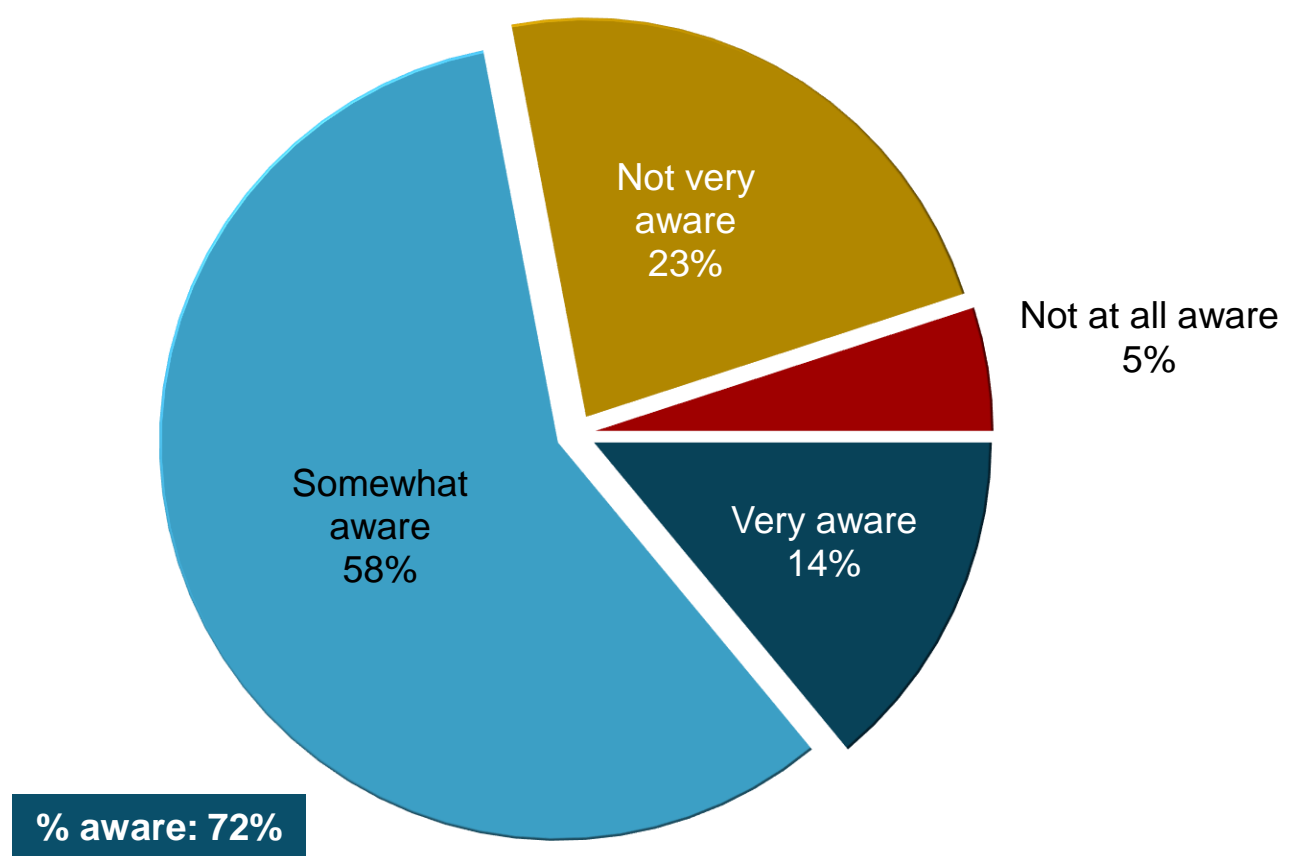
COMMUNICATION

- Seven-in-ten Manitobans say they are very or somewhat aware of artistic and cultural activities in their community, with awareness higher among Cultural Champions and Emerging Explorers.
- Word-of-mouth is the most powerful communication pathway. Manitobans are most likely to learn about arts and activities from friends or family, with slightly more than one-half saying they find out via radio and Facebook.
- Manitobans are most likely to prefer getting information about these activities via Facebook, with women, younger adults, Cultural Champions and Emerging Explorers most likely to want information via this social networking site.

MOST FEEL AWARE OF LOCAL ARTS

AWARENESS OF ARTS IN COMMUNITY

Q25. "Overall, how aware would you say you are about artistic and cultural activities happening in your community?"



Those most likely to say they are very or somewhat **aware of artistic and cultural activities** happening include:

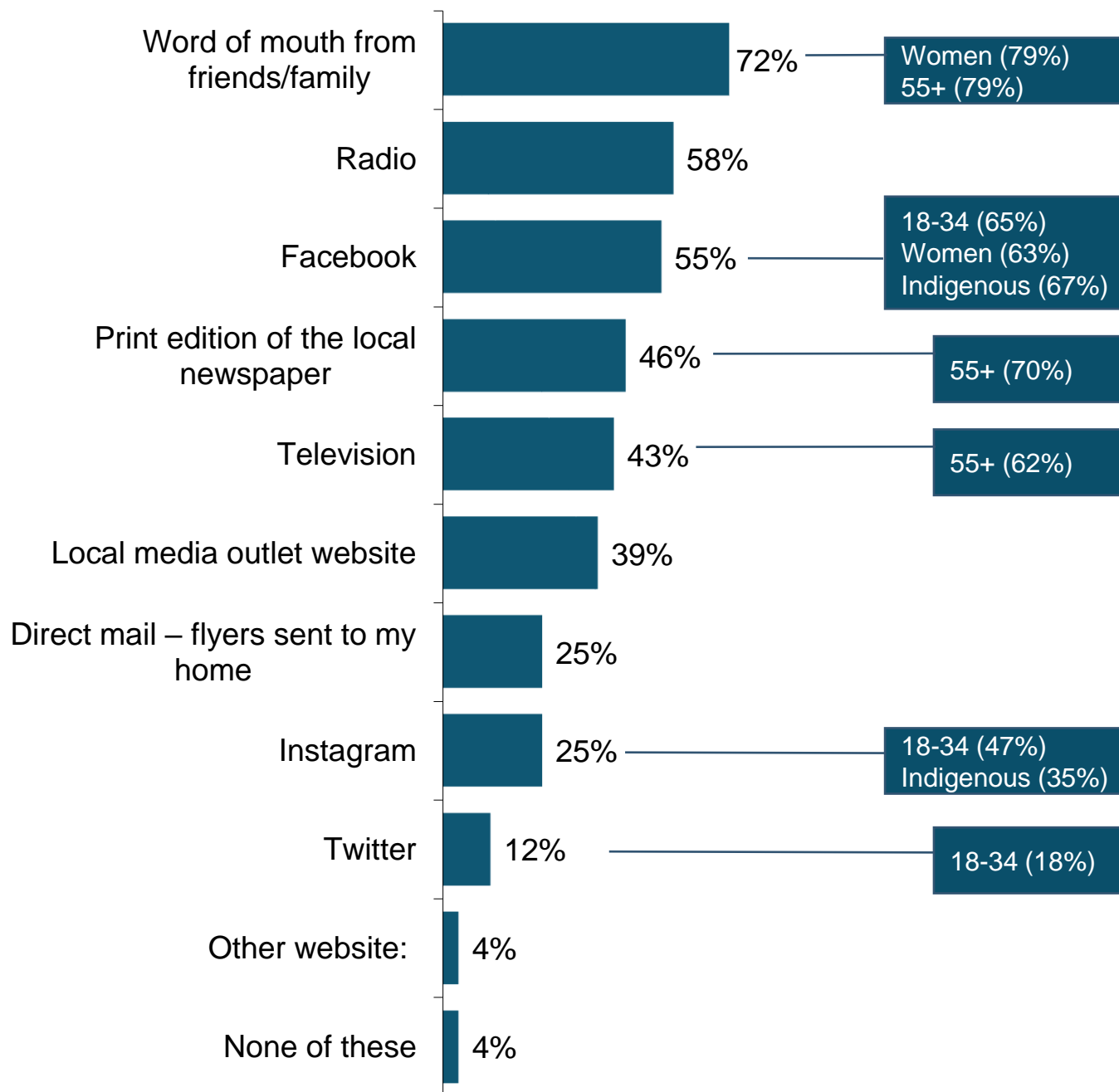
- Cultural Champions (90%) and Emerging Explorers (82%)
- Rural Manitobans (76% vs. 69% among those in Winnipeg). Within Winnipeg, awareness is highest in the core (76%) and lowest in the northeast (57%)
- Older Manitobans (77% among those 55+)
- Higher income earners (77% among those earning \$100K+) and those with higher levels of formal education (74% among university graduates)

Base: All respondents (N=1,200)

WORD OF MOUTH IS MOST COMMON SOURCE OF ARTS EVENTS INFORMATION

SOURCES OF INFORMATION

Q26. "Which of the following sources of information do you use to find out about artistic and cultural activities happening in your area? Select all that apply."



Base: All respondents (N=1,200)

*Multiple mentions accepted; totals will exceed 100%

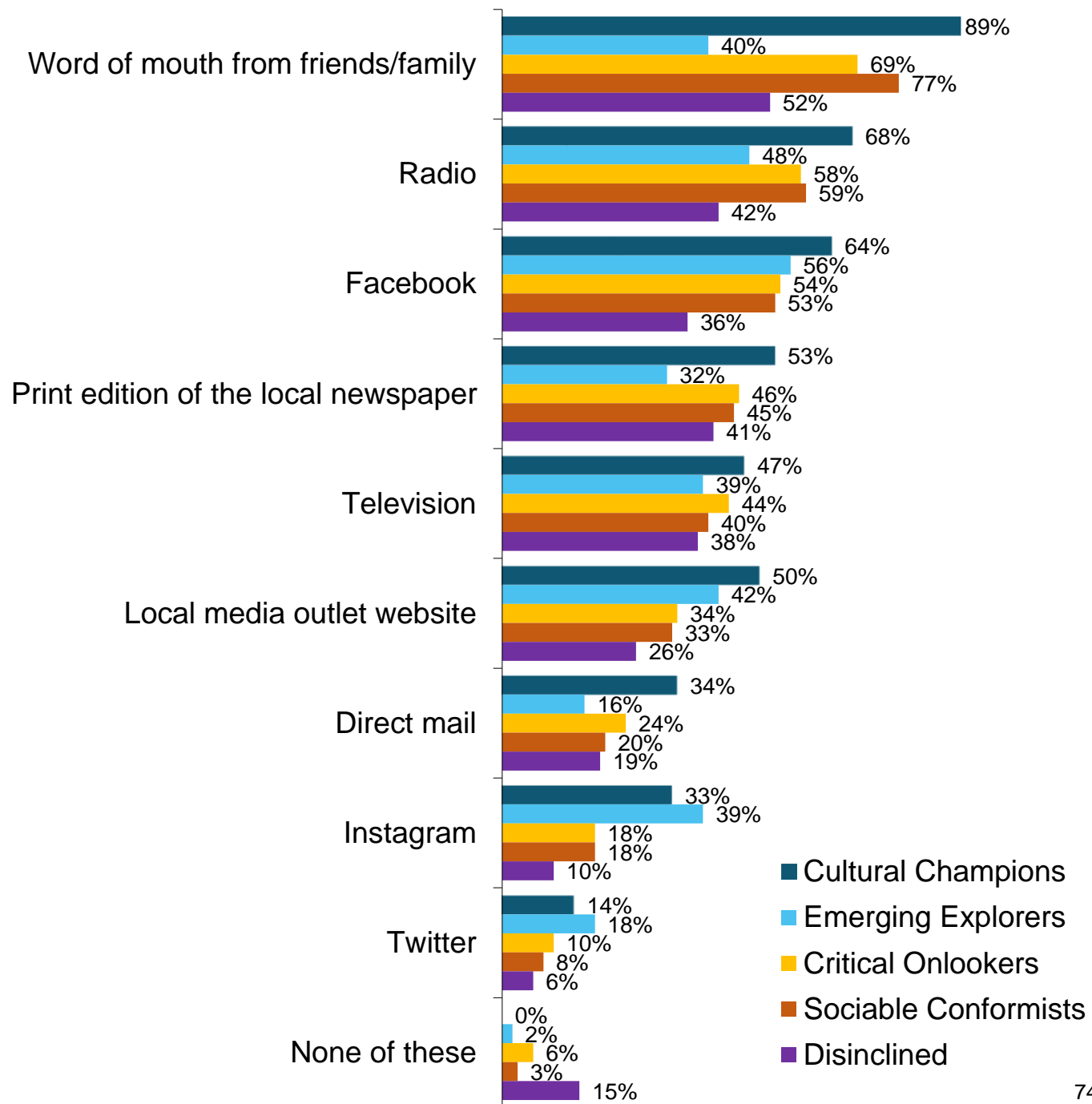
EMERGING EXPLORERS MORE LIKELY TO RELY ON SOCIAL MEDIA CHANNELS

TOP SOURCES OF INFORMATION, BY SEGMENT

Q26. "Which of the following sources of information do you use to find out about artistic and cultural activities happening in your area? Select all that apply."

Base: All respondents (N=1,200)

*Multiple mentions accepted, totals will exceed 100%

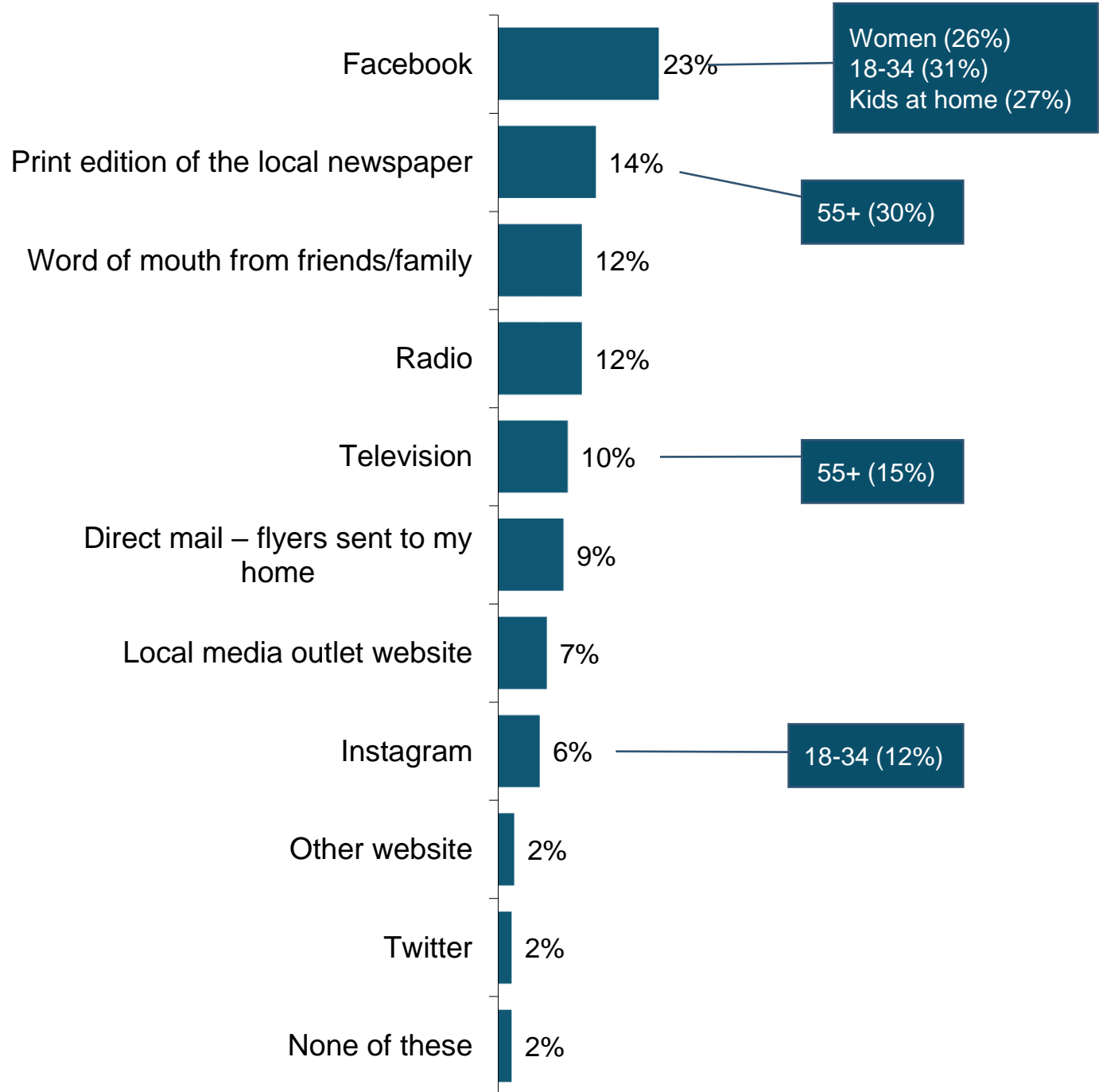


RESPONDENTS SAY FACEBOOK IS THE BEST WAY TO ADVERTISE ARTS EVENTS

PREFERRED CHANNEL

Q27. "And what would you say is the best method to use to let you know about artistic and cultural activities happening in your area? Select only one response."

Base: All respondents (N=1,200)

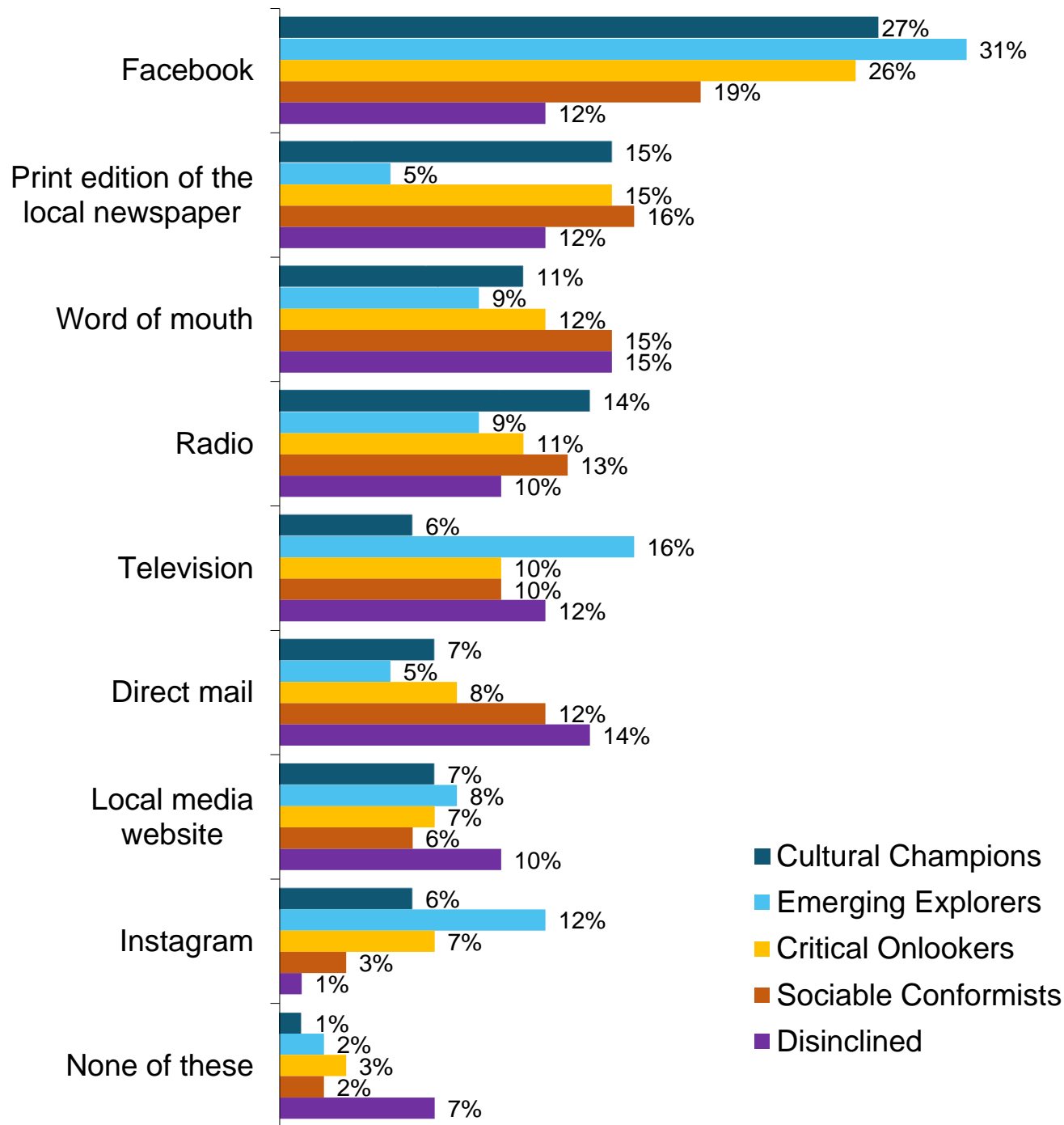


LESS-ENGAGED SEGMENTS ARE MORE LIKELY TO PREFER PRINT, WORD OF MOUTH

PREFERRED CHANNEL, BY SEGMENT

Q27. "And what would you say is the best method to use to let you know about artistic and cultural activities happening in your area? Select only one response."

Base: All respondents (N=1,200)



PROFILE OF RESPONDENTS



PROFILE OF RESPONDENTS

*DK/NS removed; numbers may not add up to 100% due to rounding

	TOTAL	18-34	35-54	55+
	(N=1,200)	(N=387)	(N=347)	(N=466)
	(%)			
GENDER				
Men	48	49	50	44
Women	52	50	50	56
REGION				
Winnipeg	60	56	64	59
<i>Northwest</i>	13	12	15	11
<i>Core</i>	11	13	10	9
<i>Southwest</i>	15	14	14	17
<i>Southeast</i>	11	8	10	16
<i>Northeast</i>	11	10	15	7
Rural	40	44	36	41
AGE				
18-34	33	100	-	-
35-54	37	-	100	-
55+	29	-	-	100
EDUCATION				
High school or less	20	31	12	17
Some post-secondary	19	18	19	22
Post-secondary graduate	61	51	68	61

PROFILE OF RESPONDENTS (CONT'D)

*DK/NS removed; numbers may not add up to 100% due to rounding

	TOTAL	18-34	35-54	55+
	(N=1,200)	(N=387)	(N=347)	(N=466)
	(%)			
INCOME				
<\$50K	28	38	23	24
\$50K-\$99K	40	42	32	46
\$100K+	33	21	56	29
CHILDREN AT HOME				
Yes	29	30	56	3
No	71	70	44	97
INDIGENOUS STATUS				
Indigenous	11	18	9	5
<i>First Nations</i>	4	8	4	1
<i>Métis</i>	5	8	4	1
<i>Other/multiple identities</i>	1	1	1	-
Not Indigenous	89	82	91	95
COUNTRY OF BIRTH				
Canada	88	85	88	90
Other	12	15	12	10