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Arts and Heritage Access and Availability Survey 2020-2021

Executive summary

Prepared for Department of Canadian Heritage and Canada Council for the Arts

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This public opinion research report presents the results of a mixed-mode online and telephone survey conducted by Environics Research Group from February 19 to March 5, 2021.

Cette publication est aussi disponible en français sous le titre *Les arts et le patrimoine: Sondage sur l'accès et la disponibilité 2020-2021*.

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Executive summary

Background and objectives

The Arts and Heritage Access and Availability Survey (AHAA) is designed to collect information on Canadians' behaviours, attitudes, and values towards an array of issues associated with the arts, culture and heritage. The Department of Canadian Heritage (PCH), in partnership with the Canada Council for the Arts, conducts this survey approximately every three to five years. The work consists of a nationally representative public opinion survey in both official languages, to complement and build on research already undertaken in the area of arts and heritage attendance and engagement, and assists with the evaluation of impacts of arts and heritage policy and programs and performance measurement. The survey measures overall arts and culture attendance in Canada and the average Canadian's recognition of the arts. Results of this survey also enable the Department to ensure its programs continue to respond to and report on the behaviours and preferences of Canadians. As well, the Department's programs are operating in a context in which new technology and developing platforms, the COVID-19 pandemic, and the responsibility to promote an inclusive society, are key drivers. Now, when the world is undergoing the global effects of the COVID-19 pandemic, it is especially important to assess shifting attitudes and behaviours which affect the arts sector.

Specific objectives of the study included, but were not limited to, the following:

- Providing disaggregate data on the attitudes and behaviors of the general population and distinct demographic sub-sets of Canadians in the context of COVID-19.
- Establishing a benchmark reflecting the levels of arts and heritage participation from which to measure return and recovery post-pandemic.
- Increasing the level of understanding of cultural attendance and participation by members of equity groups and provide insights on the impact of COVID-19 on the cultural participation of these communities.
- Tracking trends in digital consumption and discoverability of the arts and heritage and help assess the extent to which the pandemic has influenced attitudes and behaviours related to on-line engagement as an alternate or complement to in person participation.
- Informing the Department's results reporting and Gender-based Analysis Plus (GBA+) analysis.

Methodology in brief

The 2020-21 version of AHAA marked a move to an online methodology using opt-in panel sample. The Department required a sample size of 10,000 Canadians aged 16 and over, to allow for detailed, disaggregated data reflecting the opinions of distinct demographic groups as well as intersectional analysis to inform Gender-based Analysis Plus (GBA+) analysis¹. The main methodology for the general population sample was a 15 minute online survey with a representative sample of 10,000 Canadians (aged 16 and older) in the provinces. *As the online survey uses an opt-in panel, this is a non-probability sample and no margin of sampling error is calculated. For more information see the Methodology section of the full report.*

Because of the small population in the three territories, and insufficient presence from these territories on online panels, Environics also conducted a companion telephone survey, completing 100 interviews in each of

¹ <https://women-gender-equality.canada.ca/en/gender-based-analysis-plus.html>

the territories. The telephone survey used a probability sample and the margin of sampling error on the total of n=306 telephone interviews is ± 5.6 percentage points at the 95% confidence interval. The results of these two data sets (provincial and territorial) were merged for this report, but the data from the two modes can also be examined separately. The combined large number of surveys assured a good representation of interviews with members of equity groups.

The online survey was conducted from February 19 to March 5, 2021. The telephone survey was conducted from February 25 to March 5, 2021.

The following table shows the number of completed interviews by jurisdiction

Jurisdiction	Total	BC	Alberta	SK	MB	Ontario	Quebec	Atlantic	Territories
Number of completed interviews	10,526	1,383	1,153	308	359	3,921	2,355	741	306
Regional distribution % of completed interviews	100%	13%	11%	3%	3%	37%	22%	7%	3%

Definitions

The following definitions for specific population groups reflect the questionnaire:

- *Racialized person*: those identifying a non-white ethnic identity.
- *Indigenous people*: First Nations, Métis, Inuk/Inuit/Inuvialuit, or other Indigenous-identifying person.
- *Person who is Deaf*: Deaf, partially deaf, or hard of hearing.
- *Persons with disabilities*: a long-term or recurring impairment (such as vision, mobility, flexibility, dexterity, pain, learning, developmental, memory or mental health-related) which impacts their daily activities.
- *Official language minority communities*: those completing the survey in English in Quebec, or in French outside of Quebec.
- *LGBTQ2+*: Gay/lesbian, and those of other non-heterosexual sexual orientations (bisexual or pansexual, asexual, and other).
- *Gender*: Female, Male, non-binary or other gender identity.
- *Immigrant*: those born outside of Canada.

While not an exhaustive list of all communities who may face barriers to participation in the arts, for the purposes of this report equity groups includes racialized people; Indigenous peoples; the Deaf; persons with disabilities; official language minority communities; LGBTQ2+; and immigrants.

Note on comparisons to the previous surveys

For survey questions asked in previous editions the results have been compared, but with caveats. In 2021 the main survey methodology was changed to online, with a much larger sample of Canadians 16 years of age and over and no oversamples of target audiences. The 2012 sample was different; it included Canadians aged 18 and over only (in 2017, this was expanded to include 16- and 17-year-olds) and consisted of 20 percent cell phone numbers (in 2017, 35 percent of the sample represents cell phone numbers, to achieve a youth oversample).

There are also wording differences in some questions, which are noted in the report. For some questions a “not sure” response was added to the online questionnaire in 2021 to facilitate movement through the survey. This can result in higher proportions indicating they are not sure than would be the case if this response was not provided (in the previous surveys, where “don’t know” was a volunteered, unread option). In those situations, the data have been recalculated on the base of those giving a response, to provide more comparability (this again is noted in the report).

There are some typical differences in response between online, self-completion surveys and telephone surveys with a live interviewer. In general, respondents can be a bit more emphatic or enthusiastic when speaking to an interviewer, due in part to social desirability bias, in which some respondents may answer in a way they (consciously or unconsciously) think will appear more acceptable to the interviewer. With a change to an online methodology, there will often be a (usually small) decrease in the strong opinion options (i.e., fewer will say “very”), with a corresponding move to the somewhat/moderate options. In these cases, it is useful to see whether the net measures have fundamentally changed or remained stable.

Another issue in the current study, which was not the case with previous studies, is the potential for recall issues due to respondents being required to think back to activities they participated in during the year before the COVID-19 pandemic. This may result in higher “not sure” responses than might have been the case if the time period being queried was more recent.

Any and all of these methodological differences may influence tracking results.

Contract value

The total contract value for the research was \$211,632.39 (including HST).

Use of findings of the research

Results of this survey enable the Department to ensure its programs continue to respond to and report on the behaviours and preferences of Canadians.

Political neutrality statement and contact information

I hereby certify as Senior Research Associate of Environics Research Group that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada, and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.



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Research Firm: Environics Research Group
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For more information on this report, please contact the Department of Canadian Heritage at: PCH.info-info.PCH@canada.ca.

Key findings

Overall, the survey findings reveal that in-person public engagement with arts and culture in Canada has been seriously affected by the COVID-19 pandemic, but that online arts engagement has held its own. Notably, perception of the overall importance of the arts and culture to quality of life remained stable. Consistent with the 2017 survey results, seven in ten Canadians consider arts and cultural events to be at least somewhat important to their quality of life. Close to nine in ten Canadians still believe it is important for governments in Canada to support arts and culture, and strong majorities remain in agreement with government initiatives to support the arts despite the pandemic situation. Four in ten Canadians agree to some extent that arts and cultural activities have been important to their personal well-being during the pandemic (just under half disagree, which includes two-thirds of those who did not attend any arts or cultural events before or during the pandemic), and one in three agree that arts and heritage activities have helped them feel part of their community during the pandemic (half disagree).

Members of equity groups are generally attending arts and cultural events at least as much as - and in some cases more than - Canadians at large. Although in the minority, higher proportions of some of these groups than other Canadians feel they do not belong in the cultural facilities in their community. There are indications some of these groups may turn to the Internet to find events and content more in tune with their needs, notably among foreign-born Canadians and official language minority communities.

The key findings of the research are summarized below.

A. Attendance and participation

Pre-pandemic

- Six in ten Canadians (59%) attended at least one of five types of arts events in person and four in ten (42%) attended an event online, in the year prior to the pandemic. The event types covered were performing arts, festivals both inside and out of the local community, visual arts exhibits, and Indigenous arts events.
- Around one in four (23%) Canadians who attended at least one type of in person arts event in the pre-pandemic year were accompanied by a child or young person (age 15 or under), representing 14 percent of Canadians aged 16 and over.

Post-pandemic

- During the COVID-19 pandemic, Canadians' ability to access arts events and exhibits was limited by mandated closures and capacity restrictions as dictated by local public health authorities.
- Just over one in ten (15%) Canadians has attended at least one of five types of arts events in person since the pandemic began; just under half (48%) have attended online.
- One-quarter of Canadians (26%) did not attend any of the five types of events (in person or online), either before or during the pandemic.

Change in attendance pre/post pandemic

- The following is a brief summary of the overall change in arts participation due to the pandemic:
 - Just under half of Canadians (46%) attended an in-person arts event in the year prior to the pandemic but have *not* attended any in-person since COVID-19 began.
 - Over one in ten (14%) who did not attend an arts event *online* in the year prior to the pandemic have done so since COVID-19 started.
 - All five arts event types (mentioned above) have seen in-person attendance decrease during the pandemic; most types of online events have had comparable attendance before and during the pandemic, except online performing arts events experienced a small attendance increase.
- Close to three-quarters (73%) who have viewed arts performances online during the pandemic report seeing Canadian content.
- Over seven in ten (72%) who watched an arts event online during COVID-19 saw something pre-recorded and half (50%) have watched a live stream.
- About half (48%) of those who watched an arts event online during COVID-19 say they have discovered new talent they would like to see in person once the pandemic is over.
- Three in ten Canadians (30%) have undertaken at least one of the following four activities in support of arts and cultural organizations since the pandemic began: donating money, goods or services;

paying to access online arts event; purchasing or renewing an arts or cultural organization membership or subscription; or volunteering with an arts or cultural organization.

- Seven in ten Canadians (69%) would be either very or somewhat comfortable attending outdoor arts events once COVID-19 is in the past, but comfort level is divided when it comes to indoor events (47% would be very or somewhat comfortable, 47% not very or at all comfortable). The top concerns mentioned by those expressing discomfort with attending either indoor or outdoor events after the pandemic include fearing new waves of the virus (22%), general concerns about getting COVID-19 (20%), and not being able to prevent exposure at events (18%).

B. Heritage institution attendance

- About seven in ten Canadians (69%) visited at least one type of heritage institution² in the year prior to the COVID-19 pandemic, with close to half each going to see an historic building/site (48%) or a museum/science centre (47%).
- Since the COVID-19 pandemic began, just over two in ten (22%) of Canadians have engaged with at least one three specific heritage activities or events: viewing digital heritage content online (16%), or attending in-person either a local heritage or commemoration site (10%), or event (5%).
- Almost nine in ten Canadians (86%) agree museums and other heritage institutions are a trusted source of history and heritage information. One-third (33%) agree arts and heritage activities are uniting them with their community during the pandemic.

C. Perceptions about arts, culture and heritage

- Consistent with the 2017 survey results, seven in ten Canadians (70%) consider arts and cultural events to be at least somewhat important to their quality of life.
- Majorities of Canadians agree to some extent with positive statements about arts and cultural activities. Strong agreement is highest that arts and cultural activities in a community make it a better place to live (36%), and that arts experiences are a valuable way of bringing together people from different languages and cultural traditions (36%). Four in ten Canadians agree to some extent with the statement “during the COVID-19 pandemic, arts and cultural activities have been important for my personal wellbeing” (30% overall agreement, 10% strongly) while just under half (48%) disagree.
- Most Canadians feel they belong at the cultural facilities in their communities, but an important minority indicate they feel like they do not belong. While close to six in ten Canadians (57%) disagree with the statement “I feel like I do not belong at the cultural facilities in my community,” three in ten (31%) agree to some extent. Some segments of the Canadian population agree with this statement at higher rates than the general population: Immigrants; Indigenous peoples; Asian, Black, and other racialized people; people who are Deaf or persons with disabilities.

² Heritage institutions mentioned in the survey include the following: a public art gallery (not including commercial galleries where art is for sale); a museum or science centre; a historic building or historic site; a zoo, aquarium or botanical garden; an archive (a place open to the public that stores documents, photographs, and other materials of historical interest).

D. Perceptions about the role of government

- As in 2017, close to nine in ten Canadians (85%) believe it is important for governments in Canada to at least moderately support arts and culture.
- When it comes to *how* governments should support arts and culture, Canadians appear to be more comfortable with the idea of generalized government support, or support for organizations or institutions, rather than having funding provided directly to artists.

E. Arts and heritage in the community

- Half of Canadians give positive ratings (i.e., very good or good) for the quality of arts and cultural events and activities in their community, and more than four in ten give the same rating for the number available.
- Similarly, Canadians are more positive about the quality of their community arts and cultural facilities than about the number of these.
- In all cases, around one-quarter are neutral – saying the number or quality is neither good nor bad - and sixteen percent or fewer give negative scores.

F. Regional and socio-demographic differences

Although the survey findings are generally applicable to all regions of the country and segments of the population, some notable differences are apparent and are summarized in the following sections.

- **Region.** The following regions stand out in this research:

The *Northern territories* are distinct in this edition, which may be expected due to the telephone survey mode, the large geographic area, small community populations, and higher proportions of Indigenous residents. Residents of the Territories are notably more likely than their southern counterparts to report attending Indigenous arts events (in person or online) both before and during COVID-19, and also to report having seen works by racialized artists and Indigenous artists during the pandemic. They are less likely than others to indicate they are uncomfortable with the idea of attending events post-pandemic, whether indoor or outdoor. Despite being so active in arts attendance, residents of the Territories are among the most likely to agree they feel like they do not belong in their local cultural facilities.

Quebec residents overall attendance at arts events before and during the pandemic is generally on par with other regions. They are among the most likely to have only watched Canadian content online during the pandemic, are the most likely to have watched an arts event on a live-stream, and, notably, have the greatest sense of belonging to their local cultural facilities. While they have generally similar views about government support for the arts to other Canadians, residents of Quebec are less likely than those in B.C. or Ontario to strongly agree the government should be involved in either protecting Canada's heritage, or promoting awareness of Canadian arts and culture, and are also less likely to strongly agree with providing arts support incentives to the private sector or building/maintaining arts and heritage facilities.

Saskatchewan residents express somewhat lower levels of engagement in the arts: they are among the least likely to attend at least one event, either pre- pre or during the pandemic, online or in person. They are, however, among the most comfortable with the idea of return to either indoor or outdoor events when the pandemic is over. They indicate somewhat lower levels of agreement with most types of government

support for the arts and are among the least likely to give good ratings to the number and quality of local events and facilities, both of these likely reflecting their lower personal engagement with the arts.

- **Socio-economic status.** As in previous editions of this research, survey results vary most noticeably by education level and, to a somewhat lesser extent, by household income. Attendance and participation levels are highest among university-educated Canadians, as are opinions about the value of arts and culture. Those in higher education and household income brackets also have a greater sense of belonging in their local cultural facilities.
- **Youth (16-24 year olds).** In this edition of the research, younger Canadians age 16-24 are among the most likely to attend online events both before and during the pandemic, but their in-person arts attendance is generally lower than older Canadians, except for visual arts events. Their affinity for online arts events means they have been more connected to the arts during the pandemic than their older counterparts. Canadians in this age group are the most likely to have identified a new performer online during the pandemic they would like to see in person once it is over, and are the most likely to strongly agree that during the pandemic, arts and heritage activities have helped them feel a part of their local community. They have among the highest levels of undertaking personal arts support activities, despite also being the most likely to agree they feel like they do not belong in their local cultural facilities. They agree with government support for the arts but, at the same time, they are the most sceptical about whether museums and other heritage institutions are a trusted source of history and heritage information.
- **Indigenous peoples.** The views of Indigenous people continue to stand out regarding their use of and support for the arts and culture. They are as likely as non-Indigenous Canadians to report attending an in-person performing arts event in the year prior to the pandemic, but are more likely to report attending other types of events, especially Indigenous arts events, and are the group most likely to have brought a young person with them to in-person events. They are also more likely than others to have attended each type of online event in the pre-COVID-19 period. Two-thirds report seeing works by Indigenous artists during the pandemic, and a similar proportion say they have identified a new artist online to see in person after the pandemic. Despite being consumers of and supporters of the arts, they are one of the groups most likely to agree they do not belong in local community cultural facilities. They are among the most avid consumers of heritage information (visiting archives, viewing digital heritage information), however, they have lower levels of strong agreement that museums and other heritage institutions are trusted sources of information. In this edition they have similar views to other Canadians about the number and quality of arts events and facilities in their local community.
- **Racialized people.** In general, racialized Canadians are more likely than white Canadians to have attended arts events in both the year prior to and during the pandemic; white Canadians are more likely to have attended only pre-pandemic. Racialized Canadians are also more likely to have identified from online viewing a new performer, group or event they would like to see in person after the pandemic is over. While racialized people express generally high levels of agreement with various types of government arts support, and are more likely to indicate they have undertaken activities in support of the arts themselves, they are also more likely to agree they do not feel like they belong in local community cultural facilities. Asian Canadians are less likely to strongly agree when it comes to various options for government support for the arts or to say governments should place a great deal of emphasis on supporting arts and culture, but their overall agreement is on par with others.
- **Immigrants.** In this survey, Immigrants are defined as people not born in Canada. The pattern of results among foreign-born Canadians suggests they are often more engaged attenders of arts events than their Canadian-born counterparts, especially in viewing online arts events, possibly as a way to connect with their

birth country artists or communities. They are also more likely to have attended a heritage site prior to the pandemic. Immigrants are more likely to be uncomfortable with the idea of attending both indoor and outdoor events after the pandemic than are those born in Canada, and are slightly less likely to rate the number and quality of events and activities or facilities in their community as good. Despite their enjoyment of Canadian arts events, they are less likely to strongly agree Canadian performers are competitive on the world stage, and are the most likely to report only seeing foreign-created content online during the pandemic.

- **LGBTQ2+.** Gay, lesbian, bisexual and other non-heterosexual respondents appear to be enthusiastic attenders of arts and cultural events, and strong believers in government support for arts and heritage. They are among the most likely to value the arts (i.e., to say they are very important to quality of life), and more likely than heterosexual Canadians to agree strongly that they have felt connected to their communities through the arts during the pandemic. They are as likely as heterosexual respondents to feel that they belong within their community cultural facilities. Gay and lesbian Canadians give higher ratings regarding the number and quality of events and activities in their communities than other non-heterosexual, as well as heterosexual respondents.
- **People who are Deaf or persons with disabilities** may have been slightly less likely to attend in-person performing arts events prior to the pandemic, potentially due to the challenges inherent in dealing with facility capabilities (or lack thereof) for supporting their individual needs, but this does not mean they are less likely to enjoy or support the arts in general. They are more likely than others to report having seen online works by racialized artists, Indigenous artists and Deaf artists or artists with disabilities during the pandemic, more likely to have identified from online viewing a new performer, group or event they would like to see in person after the pandemic is over, and more likely than their counterparts to report undertaking activities in support of the arts and cultural organizations during the pandemic. Persons with disabilities express more concern about returning to outdoor events after the pandemic than do others, and are less likely than others to give a good rating to the number and quality of local arts events or facilities, likely reflecting that these may not be serving their needs. Still, persons with disabilities are among the groups most likely to say the arts are important to their quality of life.
- **Official language minority communities.** Official language minority communities generally describe similar arts and cultural experiences to other Canadians except for somewhat higher online engagement, which may reflect their seeking out events in their mother tongue. They are among the most likely to agree that arts experiences bring together people from different languages and cultural traditions, and have generally strong agreement with various types of government support for the arts. They are less likely than others to rate as good the number of *events and activities* in their community, and express somewhat more discomfort at the idea of attending *both* indoor and outdoor events immediately after the pandemic than others.