



# Survey of Performing Arts Presenters

## *Value of Presenting: A Study of Arts Presentation in Canada*

**FINAL REPORT**

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Strategic Moves  
&  
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# EXECUTIVE SUMMARY

## ***Objective***

Canada's performing arts presenting networks have been conducting a large-scale enquiry in order to understand and communicate the value and benefits of arts presenting for Canadians and to raise awareness of the role of the live arts presenter in the creative chain, in communities, and in society. This survey is one of the inputs to learn how the presenting sector perceives itself and its roles. Key findings from it and all of the other initial research and exploratory activities will become part of a wide-ranging Report of Findings summarizing the learning of the first year of this process, in April 2012. The final bilingual report of the study is expected to be published in the spring 2013.

## ***Methodology***

The survey was conducted as a self-administered form completed over the Internet by key, senior contacts in responding performing arts presenting organizations. The survey explored the role and benefits of the arts presenting community to the artistic eco-system and to audiences, communities and society as a whole. It also explored the future priorities and challenges of arts presenting. Responding organizations were also asked to describe the level of effort or emphasis that they place on a number of presenting activities, as well as to provide a detailed profile of their organization in terms of size, location, physical venue or rental arrangements, and nature of the arts that they present (i.e., discipline, series/single events, festivals). A regionally, culturally and programmatically diverse list of total of 288 presenting organizations elected to participate in the survey. Results were compiled overall, as well as by key segments of the presenters in the survey sample.

## ***Organizational & Artistic Characteristics of Presenters***

- For most respondents to this survey, arts presentation is the central mandate of their organization. There are also a number of Canadian presenters for whom arts presentation is not a part of their primary mandate, but rather a complementary activity to their core purpose, such as, for instance, an educational institution, cultural community group or municipality that presents art works in addition to fulfilling a separate primary mandate.
- Across the country, arts presenters range in size, audience reach, venue use, artistic focus, and various other aspects. Arts presenters in smaller communities are typically smaller organizations, with smaller budgets and few staff. They are typically narrow in their artistic focus, delivering presentations in two or three art forms, although highly specialized presenters (focusing on one art form) are more common in urban areas.

- Music is unequivocally the most common art form presented across Canada. Many of the presenters surveyed also present theatre, dance, comedy, spoken word/storytelling, and opera/musical theatre. Arts other than performing arts, such as visual arts and film are also commonly presented. Most organizations present several of these art forms.
- Many arts presenting organizations reach cultural or linguistic minority or diverse audiences. Half of presenters surveyed serve Aboriginal, official-language minority and/or culturally diverse audiences, and arts presentation is typically only part of their mandate, indicating the presenters that deliver to these audiences tend to be broad-reaching organizations.
- Most presenters receive government funding. Government funding, from all levels of government, is also the primary source of funding to most presenters, followed closely by box office revenues. Notably, presenters who are primarily filling an arts presentation mandate generate more on box office revenues than they receive government funding, suggesting that a specialization in the arts may be likely to drive greater box-office potential.
- Presenters rely heavily on volunteers. While most presenters have paid staff, staff sizes are not particularly large (typically fewer than 10 employees), and more than half of these organizations operate on modest annual budgets of under \$500,000 a year. The contribution of volunteers is particularly important for non-profit performing arts presenters, and especially for festival presenters who, at the height of their operations, engage on average nearly 200 volunteers, although a small segment engage 600 or more.
- It is common for organizations who primarily present artistic works to be using several different venues. Small, narrowly-focused arts organizations typically rent their main performance space, and often this involves staging performances in several venues throughout the year. The average number of venues used over the year across all presenters is four. Presenters who own their main presentation venue tend to be larger organizations that are less specialized and are less likely to primarily present artistic works.

### ***Roles, Priorities and Challenges for Presenters***

- Arts presenters overall feel that they contribute to fostering artistic development, particularly in exposing new art and artists and assisting those at the local level with presenting their works. Presenters also consider themselves as having a role to play in connecting with and developing audiences. Fittingly, presenters dedicate a great deal of their organization's resources to nurturing the areas in which they perceive their role to be very important.
- Community building is seen as a key contribution of presenters, from contributing to the local economy, fostering a sense of identity, building partnerships, to promoting education. Three in four organizations in the sample (76 per cent) say that they apply a great deal of effort to community involvement or social development.

- Building partnerships with other organizations in the community is seen as one of the most important roles arts presenters have in the community. Presenters often engage in partnerships with other arts presenters or producers, community-based organizations, educational institutions and government – and many of these partnerships are with organizations outside of the arts sector (in areas such as education, communications, social sciences, cultural diversity/immigration and health). These partnerships demand a great deal of resources on the part of presenters, as evidenced by the fact that presenters are mainly establishing these partnerships on a one-on-one basis and only in about a quarter of cases do they share an equal role with their partner – most of the time, presenters take the lead.
- Arts presenting organizations perceive a variety of challenges that presenters will face in the coming years, largely stemming from a changing landscape. The foremost concern for more than three-quarters of presenters in the sample is the threat of unreliable government funding. Activities related to the sustainability of presenters – securing partnerships, expanding audience base and building relationship with governments – will be the focus of presenters' priorities in the coming years, likely detracting from their focus on artistic activities.
- Organizations that are less preoccupied with securing a funding base, particularly when they are less reliant on government funding, are typically concerned with changes in audience, technology, and entertainment – issues which also have a bearing on the relevance and thus sustainability of arts presentation. For some presenters, addressing these concerns will inevitably be a priority.





# 1. INTRODUCTION

## 1.1 STUDY BACKGROUND AND OBJECTIVES

Canada's performing arts presenting networks have been conducting a large-scale enquiry in order to understand and communicate the value and benefits of arts presenting for Canadians and to raise awareness of the role of the live arts presenter in the creative chain, in communities, in society.

Many important trends have been affecting the arts sector in general:

- The concept of creative cities is becoming more widely acknowledged but still faces scepticism as the global and regional economic challenges since 2007 have been encouraging shorter term planning.
- The rapid development of online and mobile technologies has been creating new information and entertainment options and inducing changes in marketing and behaviour, furthering indirect competition and creating new challenges and opportunities for the arts sector as a whole.
- Demographic changes such as a generally aging population, urbanization of Canadians' lives, changes in immigration patterns, growth among aboriginal Canadians have been creating a distinctly different demography.

All that and the emergence of new artistic genres that attract niche audience segments, have been making audiences and shared experiences more fragmented than ever before.

Presenters, who act as links, bridges, or brokers between communities, municipalities, and performing artists, need to envision their current and future role within the arts and in society.

Year 1 activities of this 2-year study include:

- a review of the current literature,
- capturing the historic evolution of the sector in Canada,
- a series of in-depth interviews with participants inside the presenting field, related areas of artistic endeavour and participants operating in various field who use the performing arts for various reasons,
- a series of face-to-face dialogues throughout the country and in both official languages,
- a survey of the Canadian public to examine the values and benefits they ascribe to performing arts presentation, and
- the current survey of presenters to learn about the presenting field's own perceptions more.

As such, this survey is one of the inputs to learn how the presenting sector perceives itself and its roles. Key findings from it and all of the other research and exploratory activities will become part of a wide-ranging Report of Findings summarizing the learning of the first year of this process.

## 1.2 SURVEY DESIGN

The survey was conducted as a self-administered form to be completed over the Internet by key, senior contacts in responding performing arts presenting organizations. The survey explored the role and benefits of the arts presenting community to the artistic eco-system, to audiences, to communities and to society as a whole. It also explored the future priorities and challenges of arts presenting. Responding organizations were also asked to describe the level of effort or emphasis that they place on a number of presenting activities, as well as to provide a detailed profile of their organization in terms of size, location, physical venue or rental arrangements, and nature of the arts that they present (i.e., discipline, series/single events, festivals).

As no known sample frame exists of performing arts presenting organizations, a comprehensive sample frame was created based on lists from 23 different sources. The following is a distribution of the number of arts presenting organizations submitted in each sample, as well as the number ultimately sampled from each source following the removal of duplicate entries. there were 1,418 unique organizations once duplicates were removed.

	Total Submitted Sample	Final Sampled List (with removal of overlap)
Atlantic Presenters Association's venues database	47	35
CanDance members	48	16
CAPACOA presenter members and conference attendees	66	27
Canada Council Performing Arts directory of Dance Presenters	151	60
Canada Council Performing Arts directory of Music Presenters	494	253
Canada Council Performing Arts directory of Young Audience Presenters	144	30
CCI presenter members and Ontario Contact attendee	137	82
Canada Council Performing Arts Directories of Theatres and Festivals	51	3
Manitoba Arts Network Membership 2010-2011	41	29
Manitoba Music	50	24
Canadian Organization of Campus Activities members	97	57
List of Quebec presenters compiled from public sources	.. <sup>1</sup>	215
Atlantic Presenters Association members and Contact East attendees	89	48
British Columbia Touring Council's Presenters Directory	111	71
Association des diffuseurs spécialises en théâtre members	27	14

<sup>1</sup> Following an initial submission of Quebec presenters, all presenters from other lists were recoded under this source category for the purposes of the survey.

	Total Submitted Sample	Final Sampled List (with removal of overlap)
Arts Touring Alliance of Alberta members and Showcase attendees	155	112
Directory of Children's Festivals	11	1
Organization of Saskatchewan Arts Councils members	50	39
Réseau atlantique de diffusion des arts de la scène members and FrancoFête attendees	56	37
Réseau Ontario members and Contact ontariois attendees	29	23
Folk Music Canada directory, including Ontario Council of Folk Festivals members	347	185
Réseau des grands espaces members	74	44
Western Artistic Roots Directors directory	29	8
<b>Total</b>	<b>2,454</b>	<b>1,418</b>

Once designed, programmed and translated, the survey questionnaire and communications were tested with a small number of arts presenting organizations. Following a number of small changes to wording, categories and skip logic, the questionnaire and communications were finalized and the survey was launched. Data collection occurred over October and November with an initial e-mail invitation and multiple reminders to non-respondents. As the response was slow considerable prompting and reminding was required. A round of telephone calls was used to boost response rates in the final two weeks of the field work.

Sampled organizations in the compiled sample frame were invited to complete the survey online. Each sample member was given a unique identifier which was embedded in their email invitation for the purposes of tracking survey responses. Since performing arts presenters matching this survey's definition can be found under several business classifications, it was anticipated that even with the compiled lists from 23 sources, the frame would not be exhaustive, nor necessarily representative of all performing arts presenters. For this reason, a second survey was made available which did not require a personal identifier to access via an open link. Qualified presenters that heard about the survey through ongoing consultation, or generally through the arts presenting community could participate this way. In the introduction to the survey participants were asked if they satisfied each of three screening criteria:

- Apply a responsible curatorial point of view to the selection of artists you present;
- Purposefully connect art, artists and audience in your performing arts presentation, rather than use performing arts as backdrop to corporate events or other business activities; and,
- Present the work of some range of artists, rather than exclusively self-present your own works.

A total of 288 presenting organizations elected to participate (166 responding through their personalized link and another 122 through the generic link). Of the 122 that responded through the generic link only 22 were confirmed as not coming from the initial list of organizations. Another 24 did not provide sufficient identifying information to confirm whether they were on the assembled list. There are few

discernable differences in these 22 organizations relative to the others participating in the survey (from the assembled listing). However, they seem to be typically smaller organizations, with fewer staff, and smaller budgets (half of them having budgets of less than \$200,000), presenting fewer artists in fewer disciplines. They are also more apt to be presenting in a festival format. This suggests the additional outreach activities succeeded in attracting the participation of a wider than usual range of qualified performing arts presenting organizations.

Following data collection, a process of coding and cleaning of the survey data took place, although no weighting scheme was applied to the data for lack of available information about the universe. A comparison was made of the distribution of the 242 responding organizations that were known to come from the assembled lists, against the original distribution of the entries in the assembled lists. This comparison showed no deep and systematic differences between the two. As such results were compiled overall, as well as by key segments of the presenters in the survey sample. This included results by geographic location of presenters (i.e., region and community size), presenters' size (including number of employees, budget and audience reach), type of presentation (i.e., format, discipline and variety of performing arts presentation), as well as language of presentation and audience presented to (i.e., Aboriginal, minority language, culturally diverse).

Based on available information, likely 240 responded to the survey as a result of an invitation from EKOS, for a response rate of 17 per cent, which is fairly low for an organizational survey, particularly one where considerable efforts were made at communications about the survey within the sector, both in advance and during the survey collection period. Although the 288 cases are a reasonably-sized sample for conducting analysis, no margin of error can be associated with the survey data, nor can any statements be made about the extent to which these 288 cases are representative of the true universe of performing arts presenters given the limitations of the available methods of sampling.

## 2. DEMOGRAPHIC PROFILE OF PRESENTING ORGANIZATIONS

The geographic differences between the types of organizations responding to this survey are noteworthy. There is a higher than expected concentration of presenters located in Western Canada relative to the Canadian population in this part of the country. Conversely, presenting organizations located in Central Canada (Ontario and Quebec) are featured less prominently in the sample relative to the density of the Canadian population. The proportion of respondents from Francophone organizations outside of Quebec equals that of presenters within Quebec, indicating this survey was particularly successful in engaging French minority organizations in the rest of Canada, and less successful in engaging presenters in Quebec. Western Canadian presenters are more likely to present in a festival format in comparison to presenters elsewhere in Canada. Presenters in Central Canada (Ontario/Quebec) are more apt to present series and specialized presenters are more common in Quebec compared with the proportion responding from other parts of the country. In Atlantic Canada, where slightly more exhaustive lists were obtained for the study, educational institutions, bars and restaurants, and seasonal presenters are proportionately more prevalent in the sample than found among other presenters in the sample.

Presenters in the sample are distributed across mid-size cities (5,000 to under 100,000 people) and large cities (100,000 people or more). There is also quite a high proportion of presenters from small communities; one in four are based in towns of less than 5,000 people.

Presenters reach audiences of various sizes – from intimate groups (fewer than 250) to large crowds (25,000 and more), and there are many presenters with multiple venues designed to engage audiences of varying sizes. There is a fairly even representation of presenters who rent their primary presentation venue as there are those who own their space. Owners of venues tend to be large organizations with bigger staff sizes and budgets, although they are less likely than those who rent space to have arts presentation as their primary mandate. Among those organizations that typically rent space on a show-by-show basis, many rent multiple spaces – and for nearly one-quarter, this is six or more different venues a year.

The arts community is keenly aware that volunteers make an important contribution to the arts, and respondents to this survey confirm that presenters rely heavily on volunteers. While most presenters have paid staff, staff sizes are not particularly large (typically, fewer than 10 employees), and more than half of these operate on modest annual budgets of under \$500,000 a year. Organizations with mandates other than arts presentation (e.g., municipalities, schools/colleges/universities) have the largest annual budgets and the largest number of paid staff. The contribution of volunteers, then, is particularly important for non-profit performing arts presenters, and especially for festival presenters who, at the height of their operations, engage, on average, nearly 200 volunteers, and in the case of organizations presenting both series and

festivals the average number of volunteers goes from an average of 30 during the day-to-day to an average of over close to 300 at the height of operations. The number of volunteers does not increase significantly from the “typical” season to the height of operations for series presenters, who average between 35 and 40 volunteers throughout the year.

The average number of venues used each year is just over four, with larger organizations, those presenting to culturally diverse audiences and festivals reporting an average use of closer to six venues each year. There is a fairly equal split between the presenters in the sample that own their own venue(s) and those that rent per show. Owners tend to be larger, with a wider array of art form offerings, while renters tend to be smaller organizations. Larger organizations, with larger budgets and more staff, are more apt to be found in larger, urban communities. Smaller organizations, with smaller budgets and few staff, are more apt to rent the spaces they use, and typically use fewer venues. They are more often located in smaller communities, and typically narrower in their focus on two or three art forms. Based on the sample responding to the survey, organizations located in Ontario are typically smaller, while those that responded from Quebec typically report larger organizations, often with larger staffs (but fewer volunteers), larger audience reach. They are, therefore, more apt than other organizations to own the venues that they use or have long term lease arrangements, and they typically use fewer venues.

## 2.1 DETAILED FINDINGS

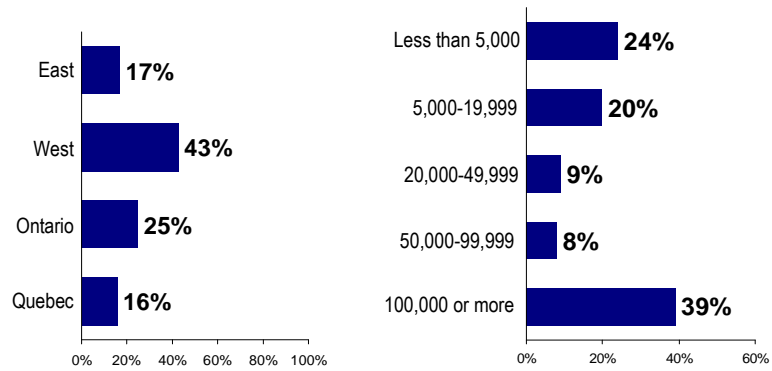
### a) Region and Language

Relative to the distribution of the Canadian population, the current survey sample has a disproportionately higher concentration of arts presenters in Western Canada, and a relatively smaller proportion in Central Canada. More than two in five organizations responding to the survey (43 per cent) are based in Western Canada – Manitoba, Saskatchewan, Alberta, and British Columbia – compared with roughly three in ten Canadians living in these provinces. One-quarter of the organizations that responded to the survey are located in Ontario (25 per cent) and 16 per cent are in Quebec, although almost two-thirds of the Canadian population can be found in these two provinces. Organizations in the Eastern provinces – Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador – make up 17 per cent of the sample, which is a higher concentration than found in the Canadian population of less than one in ten. Much of this relates to the assembled list of organizations (which also show higher proportions of organizations in the west and east relative to the Canadian population. Nonetheless the participation rate of organizations invited to the survey is higher in the west.

Nearly seven in ten presenters represented in the survey (69 per cent) are located outside of Quebec and operate in English. Of the remaining three in ten organizations responding to the survey, there are equal proportions of organizations within Quebec and Francophone organizations operating outside Quebec (16 per cent each), highlighting strong engagement in the survey among French minority language presenting organizations.

Many arts presenters are located in the largest Canadian cities. Four in ten presenters responding to the survey (39 per cent) are organizations in urban centres with a population of 100,000 or more. Thirty-seven per cent represent medium-sized communities of less than 100,000, but at least 5,000. One-quarter (24 per cent) are from more rural-sized communities with fewer than 5,000 residents.

## Region and City size



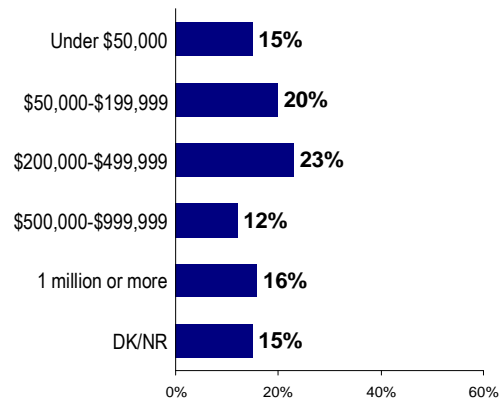
## b) Organization Size and Reach

### **Annual Budget**

The sample includes presenters with a wide range of budgets, from those with budgets under \$50,000 (15 per cent) to those with annual budgets of \$1 million or more (16 per cent). One in five (20 per cent) has a budget between \$50,000 and \$200,000. One in four (23 per cent) operate with \$200,000 to \$500,000 a year, and 12 per cent have a budget between \$500,000 and \$1 million. (15 per cent of respondents were unsure about their organization's annual budget.)

### **Total Annual Budget**

**“What was your organization’s annual budget for its fiscal year/annual reporting cycle?”**





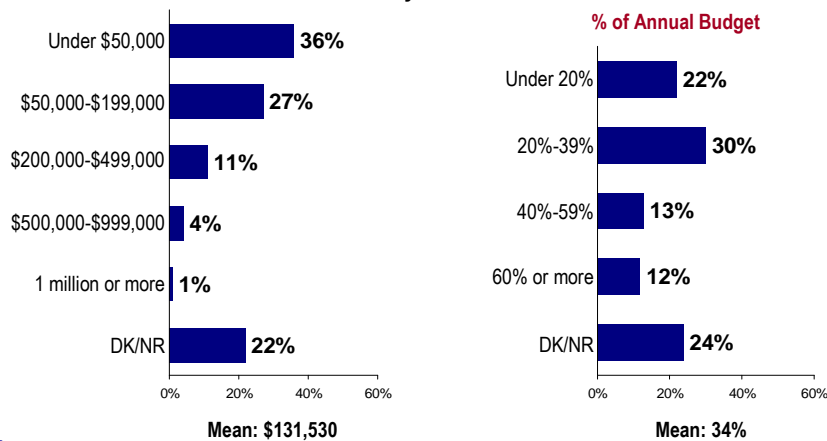
Presenters in the sample reported presenting the works of an average just over 60 artists or artistic groups over the course of their last fiscal year. This is based on just over one in three (38 per cent) showing the works of fewer than 20 artists or groups, while 37 per cent show between 20 and 74 artists or groups. One in five presents the works of more than 75 artists or groups. As expected, larger organizations show more artists' works, as do those in larger communities, those showing more art forms and those presenting to culturally diverse audiences. This is also the case with those involved in festivals.


The average amount arts presenters spent on fees paid for shows and outreach activities by artists in their last fiscal year was \$131,530, although there is considerable variation in the amounts reported across all presenters; half of presenters paid out less than \$55,000. Only one in twenty reported paying out an amount higher than \$500,000. (Just over one in five did not know how much they had paid out.) The average amount paid out as a fee per artist was \$3,464, although there is considerably variability in reported amounts paid out. Half of participating organizations paid less than \$2,143 and half paid more than \$2,143.

As a percentage of overall budget, the average paid out was 34 per cent. This ranged from under 20 per cent of budget for one in five, to 60 per cent or more for just over one in ten. As a percentage of their budget, the smallest organizations, with the smallest reach, and presenting in the smallest communities, paid out more in artists' fees.

## Annual Fees

**“Out of the expenses you incurred in your last fiscal year/annual reporting cycle, approximately how much were your annual fees paid for shows and outreach activities by artists?”**



 EKOS Research Associates Inc.

CAPACOA Presenters' Study, 2011

## ***Paid Employees and Volunteers***

Most arts presenters responding to the survey (79 per cent) have paid staff employed in the day-to-day operations of the organization. Two in five (40 per cent) have fewer than five paid staff; one in five (20 per cent) has between five and nine paid staff. 14 per cent engage between 10 and 50 employees, and only a few (5 per cent) have 50 or more employees. One in five (19 per cent) operates with no paid staff (i.e., is entirely volunteer-run). Presenters in the sample that identify primarily as presenters of festivals, or operating mainly on a seasonal basis, differ from other presenters in terms of the number of employees they engage. Among festival or seasonal presenters (n=66), the vast majority – 92 per cent – employ staff members (compared to the average of 79 per cent across all presenters). In these organizations with seasonal offerings, staff complements can increase quite significantly at the height of operations: a full 43 per cent have 10 or more paid staff during peak periods.

Roughly the same proportion of presenters responding to the survey (80 per cent) engage volunteers as have paid staff. One in five organizations (21 per cent) engage as many as 50 (or more) volunteers in the day-to-day operations of the organization, again highlighting the strong reliance on volunteers in this sector. More than a third (36 per cent) have between 10 and 49 volunteers, and one-quarter (24 per cent) have at least one and as many as nine volunteers. As with paid staff, among presenters with seasonal shows at the height of operations, the proportion of presenters relying on a large complement of volunteers jumps dramatically to a full 77 per cent of organizations that rely on 50 or more volunteers. In the case of volunteers the average number also jumps from 30, 10 fold to over 300 in the case of organizations with present series and seasonal/festival offerings. Although there is considerably variation in these numbers across presenters; half of presenters in the sample report 15 or fewer volunteers on a regular basis, rising to 120 at the height of the season.

It is the larger organizations, with larger budgets, typically located in urban centres that tend to hire the most staff, but also to rely on the most volunteers. Organizations that offer series programming in the smallest communities are less likely to have any staff and instead tend to be entirely volunteer run. These rural organizations rely on a day-to-day volunteer complement of an average of 36, with half reporting the use of 12 or fewer volunteers and half reporting more than 12. This increases to an average of 167, with half reporting less than 150 and half reporting more than 150, during the height of their operations.

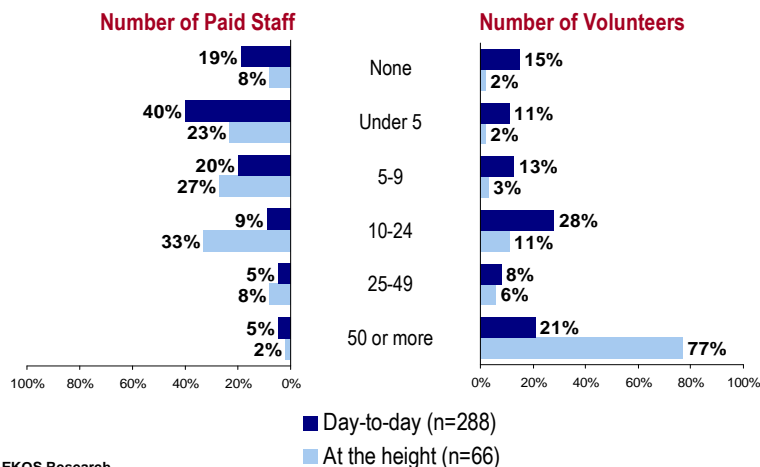
Eleven per cent of organizations report more staff than volunteers, however, over half of organizations report more volunteers than staff<sup>2</sup>. The average ratio of volunteers is 17 for each paid staff member. This considerably higher in organizations that present in a festival format where it is 25 volunteers to one paid staff member. In organizations presenting series it is closer to six volunteers for each staff member.

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<sup>2</sup> Some presenters reported no paid staff and some reported no volunteers.

## Paid Employees and Volunteers

“How many paid staff and volunteers are involved in the day-to-day/at the height of operations at your organization?”



EKOS Research Associates Inc.

CAPACOA Presenters' Study, 2011

## c) Venues

### Venue Arrangements

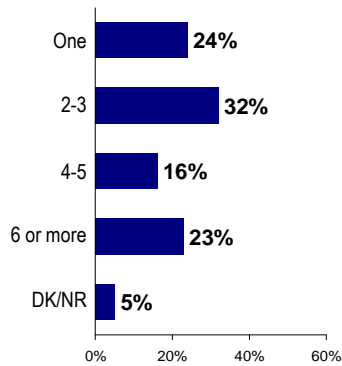
Over the last fiscal year, one in four presenters responding to the survey (24 per cent) used just one venue for arts presenting. Nearly one-third (32 per cent) used two or three sites; 16 per cent used four or five venues; and nearly one-quarter (23 per cent) used six or more different venues in their last fiscal year. The average number of venues used is 4.4, with higher averages reported by presenters of festivals, those who produce their own works, larger organizations and those presenting greater varieties of art forms (5 to 6 in each case). Those presenting to Aboriginal and other culturally diverse audiences also report the use of more venues on average (over 6 in each case).

The two most common venue arrangements for presenters in the survey sample are rental and ownership of the venue space. One in three arts presenting organizations (32 per cent) is renting on a per show basis. Just slightly fewer (30 per cent) own their venue. One in seven has a long term lease agreement for their space (14 per cent). One in ten (nine per cent) uses an outdoor venue (the terms of use/ownership not specified). Other noteworthy venue arrangements (identified by 14 per cent) include in-kind donations or loans of space, joint-use agreements or an arrangement with another presenter (e.g., partner presenter that provides the venue). Those who own their venues tend to be larger organizations, with more staff and a wider audience reach, and embrace many art forms. Those that rent per show are more apt to be smaller organizations (i.e., staff size, budget and audience reach) with a more singular focus on a few art forms, often presented as series. These organizations are also more prevalent in smaller communities. Naturally presenters of festivals and seasonal offerings are heavier users of outdoor venues,

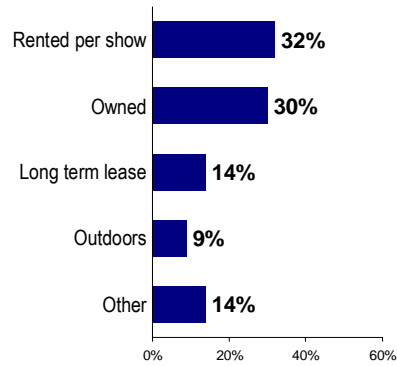
following the typical festivals patterns; having a greater concentration in the west, and often serving culturally diverse audiences.

### Venue Use and Arrangement

“How many different venues/festival sites did you use in your last fiscal year/annual reporting cycle?”



“How would you describe your organization’s main venue/festival site?”



n=288

CAPACOA Presenters' Study, 2011

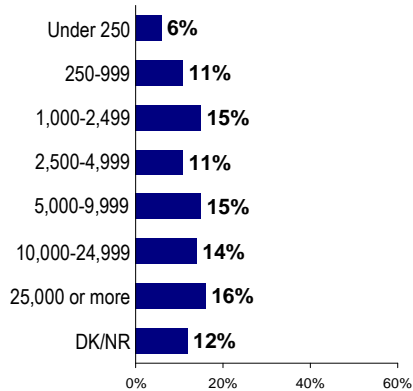
Following the patterns described previously, presenters using smaller venues are more apt to be focused on few art forms. Renters and those using outdoor venues generally seem to use a larger number of venues (although results are not statistically significant). Users of larger venues, are more often producers of festivals, often more concentrated in the west, and presenters to Aboriginal and culturally diverse audiences, who more often present using the festival format.

## Attendance

Arts presenters in the sample reported reaching audiences of various sizes, but in the most recent fiscal year, most reached at least 1,000 people based on attendance at all their events. Three in ten arts presenters reached, at minimum, 10,000 people. Not surprisingly, the largest attendance figures are driven by the largest organizations (those with the biggest staff, biggest budget) located in cities. The largest audience figures are no more driven by presenters of festivals only, series only, or both; however, organizations with a mandate to present the arts (as opposed to those whose primary mandate is to serve a separate purpose, such as providing municipal services or education) are more likely to record these high attendance figures. These figures suggest that attendance is robust across the sector and that expected variances driven by size of organization are confirmed.

### Attendance

“What was the approximate total attendance for all shows you presented in your last fiscal year/annual reporting cycle?”

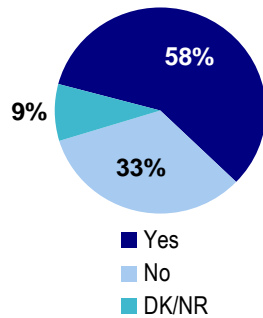


## Capital Projects

Presenters that own their primary venue were asked whether any plans are underway for new capital expenditures to be conducted on their venue. The majority of these organizations responding to the survey indicated that renovations, upgrades or modifications would be taking place (58 per cent). The nature of these changes is mainly to adapt or renovate the space (60 per cent) or to introduce specialized equipment (60 per cent). One-third are planning an expansion or new construction (32 per cent), and 14 per cent are conducting a feasibility study. Presenters are expecting to spend, on average, \$266,500 on capital projects over the next two years, although there is a very wide range of expenditures reported across all presenters in the sample. Half of presenters in the sample expect their projects to cost to be \$180,000 or less, while the other half expect to spend upwards of \$180,000. One in five – 19 per cent – did not know the range of expenditures planned for their capital project, yet. These figures suggest significant needs that would generate considerable economic activity across country. Although there is no way to extrapolate these findings to the broader population of presenters, just the 114 responding organizations in the survey anticipate \$442.5 million in expenditures.

### Capital Projects

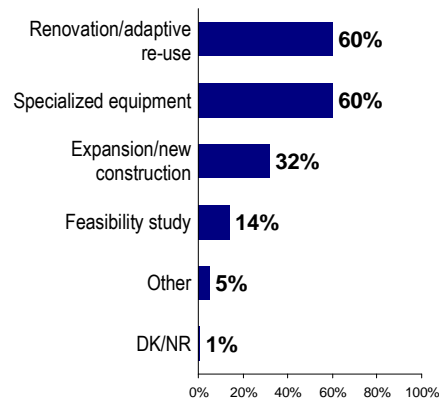
“As far as you know now, is your organization intending to conduct any renovations or new capital expenditures to the venue over the next five years?”



(If venue not rented per show)  
n=196



[IF YES] “Would this be for?”



n=115

CAPACOA Presenters' Study, 2011

- Spending is likely to be highest by presenters that are located in urban centres, those that present several art forms (six or more) and those that strictly present rather than also produce some works. Presenters in small communities are less likely to own their venue and are intending to spend on, average, considerably less than presenters in cities.

### 3. ORGANIZATIONAL CHARACTERISTICS OF PRESENTERS: MANDATE DRIVEN

For most organizations responding to this survey, presenting performing arts is their central mandate. Not surprisingly, there are also a number of Canadian presenters for whom arts presentation is not a part of their primary mandate, but rather a complementary activity to their core purpose, such as, for instance, an educational institution that presents art works.

Cultural diversity and minority languages are often a central focus of arts presenting organizations. Half of performing arts presenting organizations serve one or all of these three groups: Aboriginal (12 per cent), minority language (20 per cent), or culturally diverse communities (30 per cent). The abundance of French language arts presenters outside of Quebec is also noteworthy. Music is unequivocally the most common art form presented across Canada. Many of the presenters surveyed also present theatre, dance, comedy, spoken word/storytelling, and opera/musical theatre. Arts other than performing arts, such as visual arts and film are also commonly presented. Most organizations present several of these art forms, although there are specialized presenters who focus on just one or two arts forms. Although artistic production often happens out-of-house, six in ten of the presenters in the sample also produce their own works at least some of the time. Presenters most often present artistic works both as part of a series of presentations, such as a season of works, and works that are stand-alone events or festivals.

Organizations with arts as their primary mandate are often smaller than organizations with less of an arts focus, and they often rent their venues, using fewer of them. They also focus on presenting in fewer disciplines. Presenters of series tend to be larger organizations with more staff, but fewer volunteers compared to presenters of festivals. Series presenters have larger budgets, although their audience reach is not as large as those presenting festivals. Series presenters are more prevalent among the Quebec organizations that responded to the survey. Those presenting festivals (or both festivals and series) typically present more artists in more disciplines (including those outside the performing arts). They have fewer staff and smaller budgets, and are much more heavily reliant on volunteers. They use more venues, often outdoor venues and fewer of them are owned by the presenter. They report a much larger audience reach than series presenters do. There is a higher concentration of presenters from the west involved in festivals, and those presenting to Aboriginal audiences are likely to present in a festival format (also with a higher concentration in the west and presenting to fairly sizable audiences).

Those presenters that also produce at least some of their own works are more apt to be involved in both festival and series presentation formats. They typically use more venues and are larger organizations with larger budgets and more staff.

Organizations involved in presenting to culturally diverse and Aboriginal audiences are more apt to present in festival format and typically use more venues, typically renting them as required. Many use outdoor venues. These organizations are often involved in the presentation of media arts and interdisciplinary arts (e.g., circus arts), as well as story telling/spoken word and visual arts. In the case of those presenting to culturally diverse audiences, they present the works of a larger than average volume of artists or groups. Those organizations presenting to minority language audiences (typically French outside of Quebec) are less apt to be focus on arts as their primary mandate, as is also the case with those presenting to culturally diverse and Aboriginal audiences. In the case of those presenting to minority languages, however, fewer than half have arts as their primary mandate. These organizations tend to be small, with few staff and many volunteers.

Most presenters receive government funding, and government funding is the most common primary source of funding to presenters, followed closely by box office revenues. Federal government funding is more common for presenters in Ontario, while presenters in small communities and in Quebec are more often supported by their provincial government. Organizations serving minority language audiences – which, as has been noted, tend to be French-language organizations outside of Quebec – are particularly dependent on government funding compared to other presenters. In contrast, it is presenters who are primarily filling an arts presentation mandate who depend more on box office revenues than government funding.



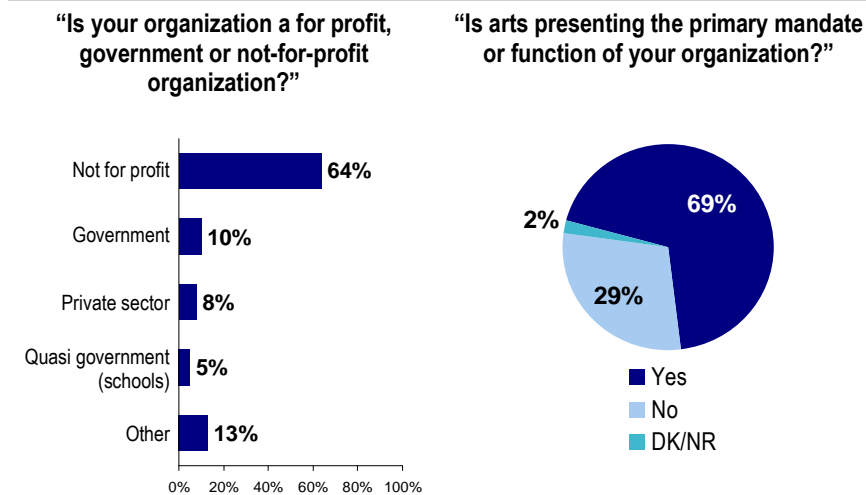
## 3.1 DETAILED FINDINGS

### a) Type of Organization

By far the largest proportion of organizations in the sample are found within the not for profit sector. A small proportion is government: typically municipal government (10 per cent) or quasi-government organizations, and schools (5 per cent). A similarly small proportion are found within the private sector: bars, restaurants, night clubs, as well as promoters (8 per cent). More than six in ten organizations (64 per cent) are from the not for profit sector.

Given this mix, it is not surprising to see that three in ten presenters in the sample (29 per cent) say that arts presenting is not their primary mandate. Their mandates include artistic creation/development/production; serving a municipality; supporting/representing students or providing education; promoting cultural, ethnic or linguistic heritage, arts and community; and providing a multipurpose venue for rentals (for the arts as well as receptions, weddings, etc.).

#### Sector and Focus of Organizations

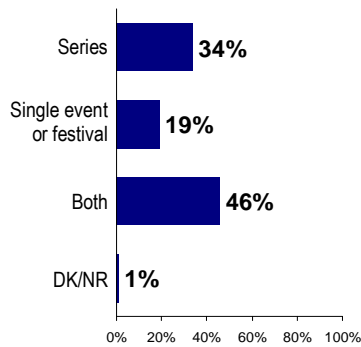


Organizations were asked to identify whether they presented series or single events/ festival or both. A series extends usually over a longer duration (e.g., several months, a year) while a single event or festival is short (ranging from a single day to a month). Almost half of responding organizations in the survey (46 per cent) say that they present both types: series and festivals/single events. One-third (34 per cent) present only series; and one in five (19 per cent) present only a festival or one-time events.

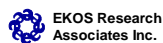
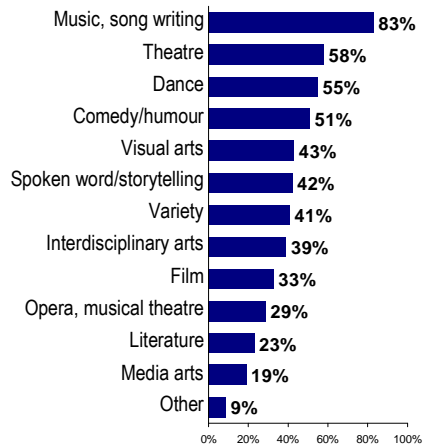
Survey results highlight the broad range of arts presentation most of the organizations in the sample are involved in. Music is the most commonly presented art form, featured by 83 per cent of presenters that responded to the survey. Almost six in ten presenters in the sample (58 per cent) present theatre, and opera/musical theatre is presented by one-third (29 per cent). Just over half present dance (55 per cent) and comedy (51 per cent). Around four in ten organizations present storytelling or spoken word (42 per cent), and a further 23 per cent present literature. Around four in ten presenters showcase interdisciplinary arts (including circus arts) and variety. Performing arts presenters do extend into some other arts as well. For example, visual arts are presented by just over four in ten organizations in the sample (43 per cent) and one-third (33 per cent) present films. Media arts are presented by another one in five (19 per cent). A quarter also have literature (e.g., book readings, writers' festivals) (23 per cent) on their programs. Considering all reported activities, roughly half of presenters reported presentation of non-performing arts disciplines, although this is higher among those organizations with more paid staff, presenting both series and festivals, as well as those that serve a minority language and culturally diverse mandates.

### Presentation Format and Discipline

“Do you present series/seasons or single events and/or festivals?”



“Which of the following disciplines does your organization present to public audiences?”



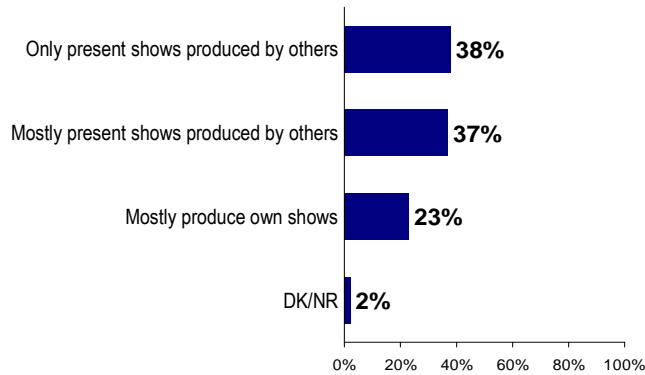
n=288

CAPACOA Presenters' Study, 2011

Performing arts presenters are not only bringing in shows that are fully produced by others: six in ten organizations produce their own shows (60 per cent) at least some of the time. Indeed, one in four survey participants (23 per cent overall) produce their own shows most of the time. However, this is much less often the case in Quebec, where it is very rare for a presenter to mostly produce their own shows and where 73 per cent bring in only shows produced by others. Just under four in ten (38 per cent) presenters in the survey sample do not produce shows at all. This finding highlights that among organizations who present the performing arts there is considerable range of creative endeavours being undertaken that require a breadth of outside skill, expertise and resources.

## Producing and Presenting

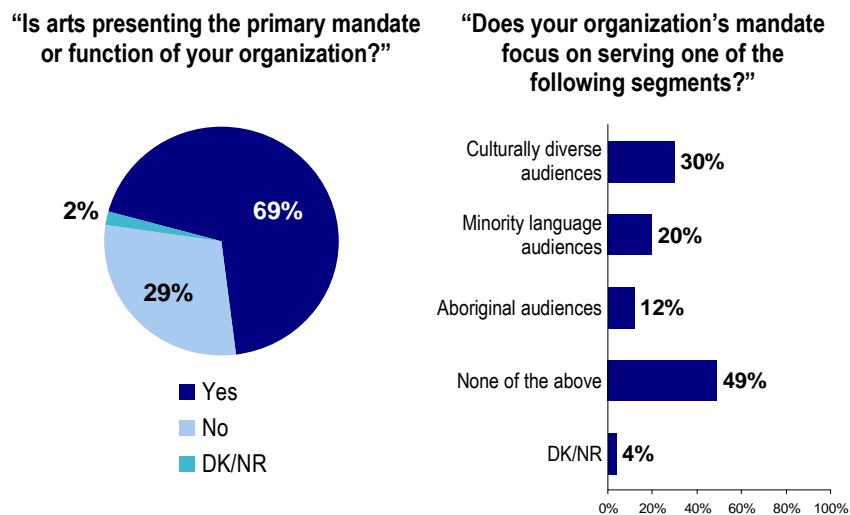
“Does your organization present only shows produced by others or do you also produce your own shows?”



A considerable segment of presenters work toward presenting the arts to or by communities that may not be otherwise considered mainstream. For instance, half of presenters have a mandate to serve a particular cultural or linguistic audience or community. Three in ten (30 per cent) serve culturally diverse audiences. One in five (20 per cent) serves minority language audiences, which typically are Francophone organizations outside of Quebec. A further twelve per cent of arts presenters have a mandate to serve Aboriginal audiences. As respondents were able to select more than one category there is some overlap between those whose mandate is to serve culturally diverse audiences, Aboriginal audiences and minority language audiences. In particular, those presenting to Aboriginal audiences are also highly likely to say that their mandate also focuses on minority language and culturally diverse audiences, accounting for more than half of the overlap.

Organizations that serve a culturally diverse or Aboriginal audience tend to be found in Western Canada, whereas those with mandates to serve minority language audiences are typically French-language organizations serving communities outside Quebec. Finally, organizations with a mandate to serve Aboriginal, culturally diverse or minority language audiences are more likely to produce their own works.

### Organization Mandate



EKOS Research Associates Inc.

n=288

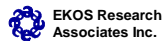
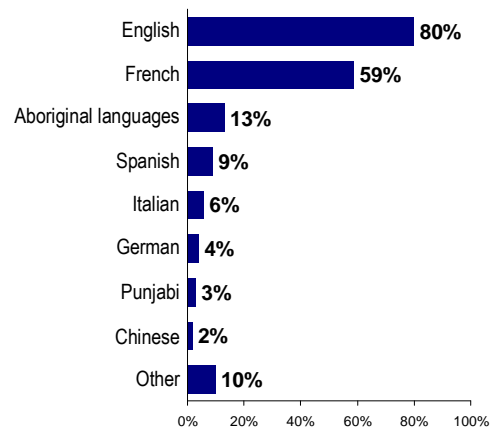
CAPACOA Presenters' Study, 2011

Francophone presenters located outside of Quebec are less likely, compared to other presenters surveyed, to have arts presentation as their primary mandate.

Though just one in five has a mandate to serve minority language audiences, more than half of presenters do present works in languages other than English. Six in ten (59 per cent) present works in French, and one in seven present works in Aboriginal languages (13 per cent). Spanish, Italian, German, Punjabi, and Chinese are other languages in which works are presented in Canada.

## Language of Presentation

“Which of the following languages do you present works in?”



n=288

CAPACOA Presenters' Study, 2011

## b) Sources of Funding

Responding organizations were asked to identify the top three sources of funding that they rely on. Among these, the more prevalent two sources of funding are government grants and box office revenues, with three in four presenters relying on these two among their top three sources.<sup>3</sup> More than two in five organizations (41 per cent) rely on government funding as their number one income source, and 36 per cent rely on box office revenue. Important second- and third-tier sources of funding for arts presenting organizations include corporate sponsorship, donations (private and foundations), and rental revenues. Revenues from fundraising events and merchandise sales make a small contribution to arts presenters' overall budget. These results differ from RIDEAU's Étude sur les coûts de la diffusion<sup>4</sup> where it

<sup>3</sup> Information on revenue sources was self-reported by organizations, in the form of a ranking of top five revenue sources. Detailed budget information was not collected.

<sup>4</sup> RIDEAU. (2009). Étude sur les coûts de la diffusion. Report available at [http://www.rideau-inc.qc.ca/ContenuStatique/Communications/Etudes/Rapport\\_CoutsDiffusionV17sept.pdf](http://www.rideau-inc.qc.ca/ContenuStatique/Communications/Etudes/Rapport_CoutsDiffusionV17sept.pdf).

was found that box office revenues represent on average 44 per cent of total revenues, whereas public funding represent 33 per cent. The results in the present study may be influenced by the lower participation of Quebec presenters and greater participation by linguistic minority presenters relative to the RIDEAU study, as well as fundamental difference in the approach to collecting these responses in each survey.

There are few differences in the types of organizations that rely on government funding, however, minority language presenters stand out in their strong reliance on government grants. Series presenters, for whom arts is their primary mandate, most often report box office sales as a key source. Those presenting single events or festivals report a heavier reliance on corporate sponsorship among different types of presenters. The largest organizations (presenting in many disciplines, with the largest staff compliments and budgets) also stand out among presenters in the extent to which they rely on rental revenues.

**Table 3.1: Sources of Funding**

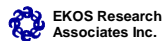
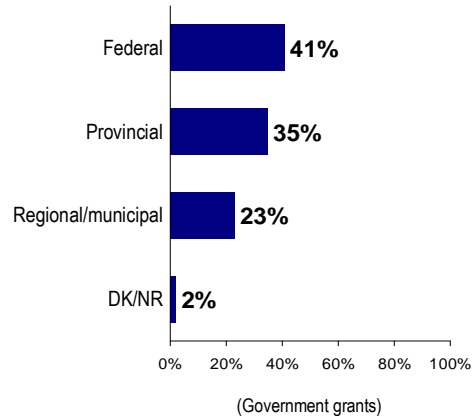
	Total of Top 3 Sources	Primary Source	Secondary Source	Tertiary Source
Government grants	76	41%	23%	14%
Box office revenues	75	36%	26%	16%
Corporate sponsorship	36	3%	14%	21%
Rental revenues	26	6%	14%	8%
Donations	26	1%	10%	17%
Fundraising events	12	1%	3%	8%
Merchandise revenues	7	0%	1%	6%
Other <sup>5</sup>	18	10%	8%	6%

Of the organizations that rely on government grants for significant part of their budget (n=237), four in ten receive most of these grants from federal sources (41 per cent). Provincial funding is the main source for 35 per cent, and 23 per cent receive their grants mainly from municipal or regional governments. First Nations governments are a supplemental source for five per cent.

<sup>5</sup> Other sources of include include: public funds other than grants, student/user/workshop fees, management/membership fees, food and alcohol, in kind sponsorship.

## Main Source of Funding

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n=237

CAPACOA Presenters' Study, 2011

- Those presenters most dependent on government funding are likely to have annual budgets in a mid-range that is neither high nor low, indicating that government funding may help elevate these organizations to a certain level, but the dependence on a limited (and often perceived as volatile) funding source may prevent these organizations from expanding. Small communities are more apt to rely on box office revenues, followed by grants.
- Organizations serving minority language audiences, particularly Francophone organizations outside of Quebec, are more likely to rely on government funding as a primary revenue source compared to the other presenters. Organizations with a primary mandate to present the arts are more likely to rely significantly on box office revenues. This may further indicate that a specialization in the arts is likely to generate higher box-office potential.
- Larger organizations, in terms of annual budget, attendance and staff size, are more likely than smaller organizations to receive municipal funding specifically out of all government funding options.
- Organizations in the smallest communities, and those in Quebec, are more likely to rely on provincial funding than funding from other levels.
- Organizations in Ontario are more likely than those elsewhere to receive most of their government grants from the federal government.

The data suggests varying funding structures in provinces.





## 4. ROLES, PRIORITIES AND CHALLENGES OF PRESENTERS

A central objective of this survey was to explore presenters' views of their own role in the artistic ecology, in communities and in society. Organizations were asked about the emphasis they put on several measures of business and artistic development.

Arts presenters overall feel that presenters contribute to fostering artistic development particularly in exposing new art and artists and assisting those at the local level with presenting their works. The larger and more diversified an organization, the more likely they are to say that presenters have a strong role to play in supporting the artistic community.

Community building is also seen as a key contribution of presenters, from contributing to the local economy, fostering a sense of identity, building partnerships, to promoting education. Larger organizations, particularly those in cities, as well as artistically diverse organizations, and those presenting in a series format, stand out in their support for the role of presenters in community building. This is also true of minority language presenters, who find community identity, in particular, to be an area where they see themselves as making a strong contribution.

Promotion of cultural understanding is a more popular theme among urban presenters, while those located in mid- to smaller sized communities place a comparatively larger emphasis on the contribution presenters make to the health and well-being of the population.

Presenters also consider themselves important in connecting with and developing audiences. Minority language presenters stand out in particular in their assertion that presenters contribute to exposing audiences to something different. Fittingly, presenters dedicate a great deal of their organization's resources to nurturing the areas in which they perceive their role to be very important.

Arts presenting organizations perceive a variety of challenges that presenters will face in the coming years, largely stemming from a changing landscape. The foremost concern for more than three-quarters of presenters in the sample is the threat of unreliable government funding. Activities related to the sustainability of presenters – securing partnerships, expanding audience base and building relationship with governments – will be the focus of presenters' priorities in the coming years. Those that are less preoccupied with securing a funding base, particularly when they are less reliant on government funding, are typically concerned with changes in audience, technology, and entertainment – issues which also have a bearing on the relevance and thus sustainability of presenters. For some presenters, addressing these concerns will inevitably be a priority.

Many presenters see the formation of partnerships and networks, as well as the professional development of future generations of staff as key areas to ensure their future viability. Increasing administrative capacity and integration of technology into productions and communications, while less important, are still seen as needing attention in the coming decade.

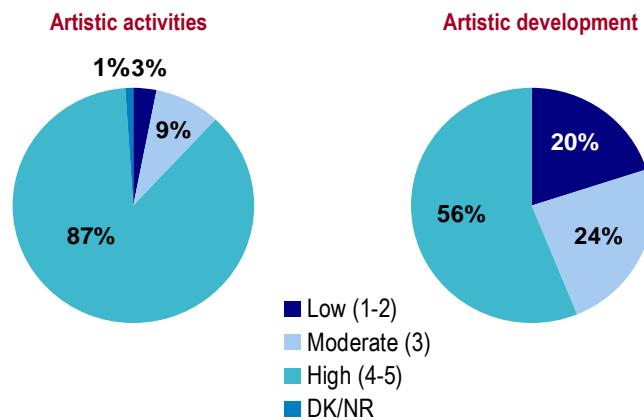
## a) Artistic Development

### *Role and Focus of Presenters*

The majority of organizations responding to the survey (87 per cent) devote a considerable amount of effort to artistic activities generally – including vision development; planning for a series or festival; and selecting artists and productions. More than half (56 per cent) would say that a high degree of effort is spent on new artistic development, such as residencies, artistic collaborations or exposing new artistic talent.

### Artistic Focus

“How much effort does your organization dedicate to each of the following areas/objectives?”



EKOS Research  
Associates Inc.

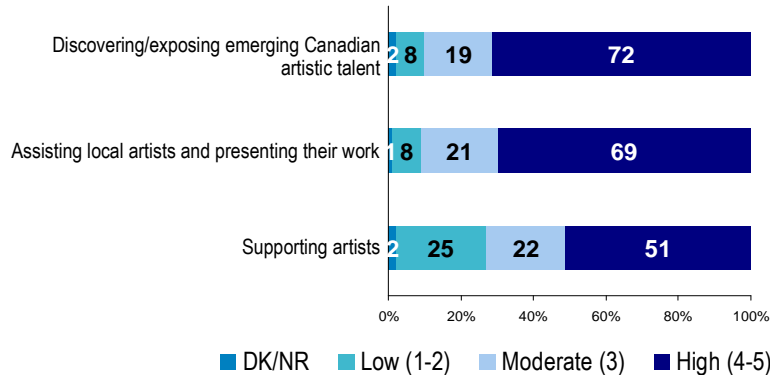
n=288

CAPACOA Presenters' Study, 2011

Supporting these same findings, more than seven in ten arts presenting organizations (72 per cent) feel that presenters in general play an important role in discovering and exposing emerging Canadian artistic talent. Almost seven in ten arts presenting organizations in the sample (69 per cent) feel that presenters have an important role in assisting local artists (perhaps over and above presenting activities). Opinion is more divided over whether presenters currently play a very large role in supporting artists by providing professional and artistic development opportunities. While half of responding organizations (51 per cent) feel this is true, 25 per cent disagree and 22 per cent believe that presenters play a moderate role here.

### Role of Presenters in Supporting Arts

“How large of a role do presenting organizations currently play in each of the following?”



n=288

CAPACOA Presenters' Study, 2011

- Smaller organizations (with smaller audiences and few staff) and those that are focused on one-off events/festival are less likely to think that presenters currently make a considerable contribution to supporting artists than reported by other presenters.
- Presenters in urban centres are more likely to feel there is currently a large role served by presenters in supporting artists, and that they make a contribution to helping local artists present their work.
- Organizations that present both series and one-time events/festivals are more likely to say presenters have a large role to play in helping local artists present their work. Francophone organizations outside of Quebec and others mandated to serve minority language audiences are also more likely than the average to hold this view, as are those that are more reliant on government funding.

## b) Involvement in Community – Society

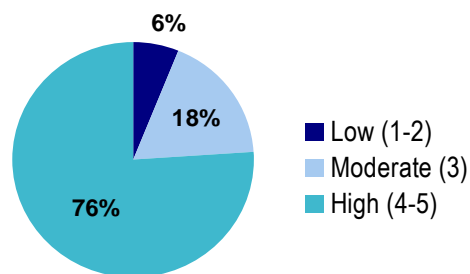
### *Role and Focus of Presenters*

Community involvement is reported as a key area for presenters. Three in four organizations in the sample (76 per cent) say that they apply a great deal of effort to community involvement or social development.

### Community Focus

“How much effort does your organization dedicate to each of the following areas/objectives?”

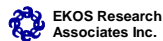
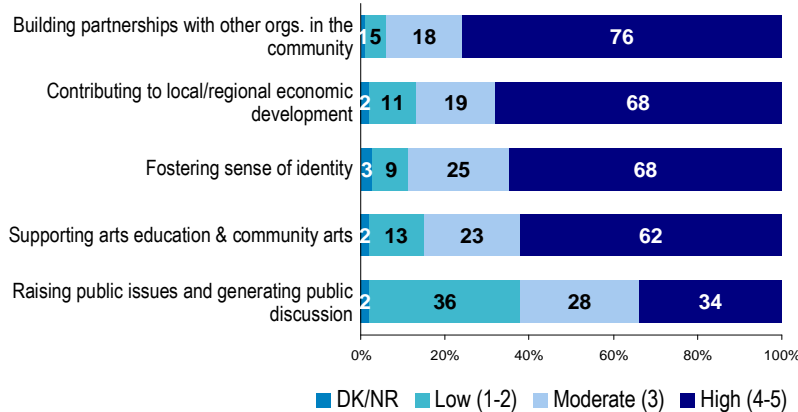
Community/social involvement/development



This finding fits with the three in four presenters in the survey (76 per cent) that believe presenters have a strong role to play in building partnerships with other organizations in the community. More than two-thirds of arts presenting organizations (68 per cent) feel that presenters currently make an important contribution to the local or regional economy. Just over six in ten arts presenting organizations (63 per cent) feel that presenters are playing an important role in fostering a sense of national, regional or community identity. A similar proportion (62 per cent) shares the opinion that presenters play an important role in supporting arts education and community arts. By comparison, generating discussion about public issues is seen as a contribution made by relatively few presenters in the survey sample, although one in three arts presenting organizations believes this to be the case (34 per cent). Nonetheless, an equal proportion (36 per cent) disagrees.

## Roles of Presenters in Community

“How large of a role do presenting organizations currently play in each of the following?”



n=288

CAPACOA Presenters' Study, 2011

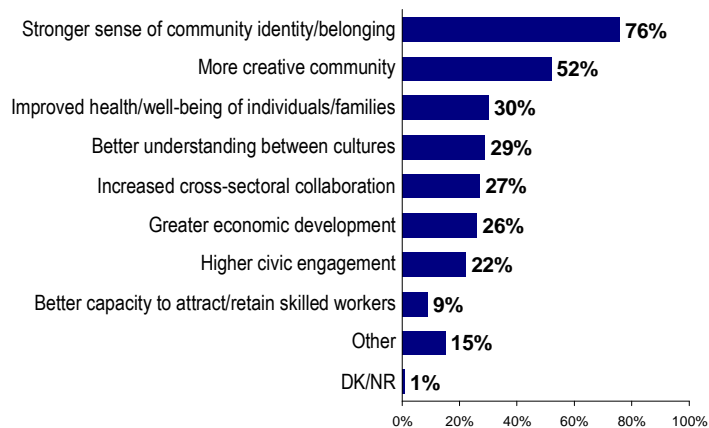
- Building partnerships in the community is seen as a greater role for presenters among those that present a diverse array of art forms (nine or more types) and those that hold series and one-time events/festivals, as well as organizations that deliver to minority language audiences, including Francophone organizations outside of Quebec. Organizations that specialize in one or two arts forms are less likely to hold this opinion, as are small budget arts presenters.
- Organizations that present a variety of art forms – nine or more – are more likely to feel the economic contribution made by presenters is considerable. Arts presenters with larger budgets are also more likely to share this opinion, as well as organizations that deliver to minority language audiences and those that rely on government funding (as one of their top two income sources) relative to other presenters.
- Fostering a sense of identity is more often viewed as a strong role for presenters among those mandated to serve minority language audiences, particularly Francophone organizations outside of Quebec, and by those that rely on government funding (as one of their top two income sources).
- Supporting arts education and community arts is more often seen as a key role for presenters among presenting organizations in Western Canada.
- The view that presenters have a strong role to play in generating public discussion is more commonly held among presenters that deliver both series and one-time events/festivals, and among presenters with larger budgets.

## ***Benefits of Arts Presentation to Communities***

Arts presenting organizations cite their most notable benefits to community as contributing to a stronger sense of community identity and belonging (76 per cent) and, to a lesser extent, promoting or enabling a more creative community (52 per cent). Between two in ten and three in ten presenters responding to the survey feel they improve the health and well-being of individuals and families (30 per cent), make contributions that enable civic engagement (22 per cent), improve understanding between cultures (29 per cent), promote economic development (26 per cent) and promote cross-sectoral collaboration (such as between business and culture; 27 per cent). Fewer than one in ten (nine per cent) placed building capacity to attract and retain skilled workers specifically in their top 3 benefits.

### **Benefits of Arts Presentation**

**“As a performing arts presenter, what do you consider the top 3 benefits of your organization to your community?”**



 EKOS Research  
Associates Inc.

n=288

CAPACOA Presenters' Study, 2011

- Presenters in Quebec are much more likely than those elsewhere to feel that one of their benefits to the community is the capacity to attract and retain skilled workers, although community identity is still the most frequently cited primary benefit (but by much less of a margin that found elsewhere in the sample).
- Organizations responsible for presenting minority languages and to Aboriginal or other culturally diverse audiences are more apt to point to understanding between cultures as a key benefit.

**Table 4.1: Benefits of Arts Presentation by Key Segments of the Sample**

	All	Quebec	Rural	Aboriginal	Minority Language	Diverse Culture
<b>Total: (number of cases)</b>	288	45	70	34	57	87
Stronger sense of community identity or community belonging	76%	58%	79	71%	88%	76%
More creative community	52%	31%	60	47%	42%	59%
Improved health and well-being of individuals and families	30%	29%	30	35%	23%	29%
Better understanding between cultures	29%	29%	23	53%	46%	39%
Increased cross-sectoral collaboration (e.g., business, cult	27%	36%	26	26%	28%	24%
Greater economic development	26%	38%	34	21%	21%	22%
Higher civic engagement	22%	27%	19	24%	30%	17%
Better capacity to attract and retain skilled workers	9%	24%	4	9%	9%	3%
Other	15%	20%	19	12%	11%	13%
Don't know/No response	1%	0%	0	0%	0%	2%

- In contrast, Francophone presenters elsewhere in Canada are much more likely than the average to view fostering of community identity as a key benefit; and Anglophone presenters across Canada are much more likely to feel their key benefit is in promoting a more creative community.
- Organizations in large urban centres are more likely than those in smaller communities to feel that they contribute positively by promoting understanding between cultures. Organizations in rural communities are very similar to the overall results with regard to reported benefits.
- In contrast, organizations in mid-sized communities feel, more so than those in small and large communities, that their benefit is in improving the health and well-being of community members.

## c) Audience Development and Changing Landscape

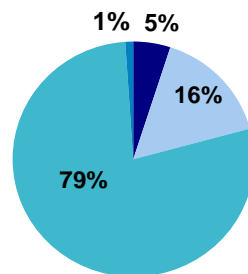
### **Role and Focus of Presenters**

Eight in ten (79 per cent) presenters in the survey report they spend considerable efforts in the area of marketing and audience development. Virtually none say that this is an area that they do not devote at least a moderate amount of their attention and resources to. In terms of changing landscape of artistic presentation, there is a much stronger divide in the proportion of presenters that say they devote a lot of their efforts and focus on technological advances (and how to make the most use of them in their presentations). On the surface this dynamic may point to a gap of understanding relating to the massive changes in audience behaviours – and expectations - due to technologies at the audience’s disposal.

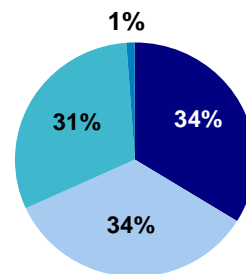
### **Audience Development Focus**

“How much effort does your organization dedicate to each of the following areas/objectives?”

**Marketing and audience development**



**Technological advances**



■ Low (1-2)  
■ Moderate (3)  
■ High (4-5)  
■ DK/NR



n=288

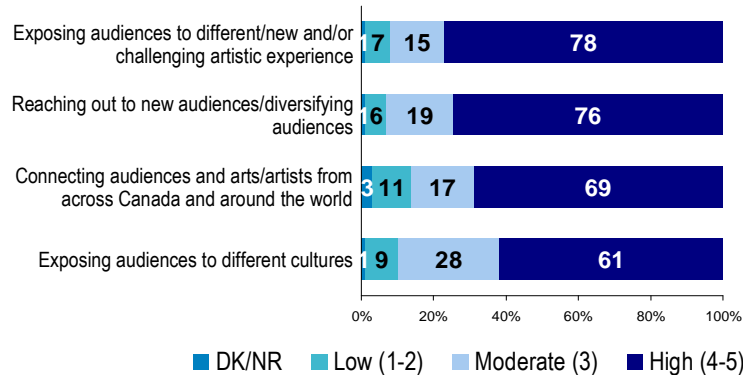
CAPACOA Presenters' Study, 2011



Validating the importance of audience development as a key focus, three-quarters of arts presenting organizations responding to the survey (74 per cent) feel that presenters are currently playing a large role in diversifying and reaching out to new audiences. A similar proportion (78 per cent) feels that presenters play a large role in exposing audiences to different or challenging artistic experiences. A slightly smaller majority of arts presenters (69 per cent) feel that presenters play a large role in connecting audiences with artists and art forms from across Canada and around the world. Six in ten arts presenting organizations (61 per cent) feel that presenters are playing a large role in exposing audiences to different cultures.

## Role of Presenters in Audience Development

“How large of a role do presenting organizations currently play in each of the following?”



n=288

CAPACOA Presenters' Study, 2011

- Those with the biggest audiences (10,000 or more) are more likely to see presenters as having a key role to play in reaching out to, and diversifying, new audiences, as are those with larger operating budgets (\$200,000 or larger), as well as organizations in Quebec.
- Minority language organizations, Quebec organizations and those reporting mid-sized budgets and audience reach are more apt than other presenters to see presenters as having a central role to play in exposing audiences to something new and different.
- The assertion that presenters connect audiences with arts from across the country and around the world is most likely to be made by medium-sized organizations (with budgets of \$200,000 to \$499,000) and those located in Western Canada than it is to be held by other types of presenters. Those that present to minority language audiences are also more apt to share this idea than the 'average' presenter.

- The view that presenters contribute to exposing audiences to new cultures is more likely to be held by presenters involved in a wide variety of art disciplines (nine or more types). Not surprisingly, presenters that are mandated to serve culturally diverse audiences are also more apt to hold this opinion.
- Presenters that rely most on government funding (i.e., one of their top two income sources) are more likely to share all of these opinions, compared to those not relying as much on government funding. This could be indicative of the influence of public policies on presenters.

### ***Challenges and Priorities – Changing Landscape***

Presenters' concerns for the future of presenting are intricately bound in the present and projected economic landscape. Arts presenting organizations responding to the survey perceive a variety of challenges that presenters will face in the coming years, but the foremost concern for more than three-quarters of presenters in the sample (76 per cent) is the threat of unreliable government funding. Other leading concerns for presenters are similarly bound up in the economic viability of their organization: 55 per cent are worried about the impact of fluctuations in the economy; 45 per cent are concerned about their ability to sustain corporate support; 41 per cent are concerned about sustaining other private (including individual) support; and 28 per cent worry about the dependence on volunteers.

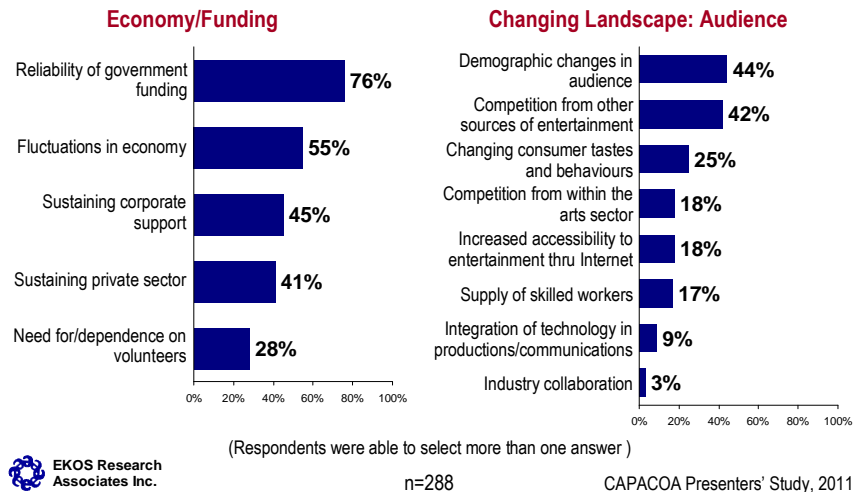
Almost one in five (18 per cent) thinks that competition from within the arts sector will be one of their greatest future challenges. A similar proportion (17 per cent) is concerned about a talent drain that will deter skilled workers from the arts (due to low wages). A very small number have concerns about the future of industry collaboration between employers, workers and associations in the arts (three per cent).

The changing nature of art forms, due to developments in technology and competition from other entertainment sources, also poses some uncertainty: 42 per cent are concerned that arts presenters will suffer from competition from other sources of entertainment. Almost one in five (18 per cent) thinks that the Internet presents challenges; and nine per cent thinks that the integration of technology into productions and communications is a notable challenge.

Concerns about changes to the make-up of audiences are fairly common: 44 per cent are concerned about the impact that an aging population will have on their audience, and 25 per cent are concerned about the changing tastes and behaviours of their audiences.

## Challenges

“What do you see as the greatest threats or challenges facing presenters in Canada in the next few years?”



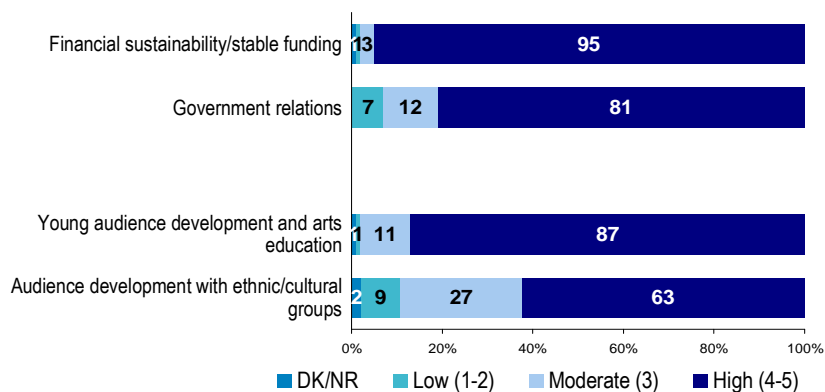
- Presenters that do not rely heavily on government funding are more concerned about changes in consumer tastes.
- Arts presenters with the largest number of paid staff are more likely to be concerned about the integration of new technology into the arts sector than the average presenter. This concern is also much higher among presenters in Quebec than elsewhere.

In terms of future priorities, top of mind for virtually every arts presenter is financial stability for the arts presenting community over the next ten years, according to 95 per cent of responding presenters in the survey that consider this to be a very important issue. Closely related to this issue, and also garnering a strong degree of concern, is the priority area of developing/ maintaining government relations, which 81 per cent think will be a focus in the next ten years.

The vast majority of arts presenters in the sample (87 per cent) feel that arts education and young audience development is a high priority area in the next ten years. There is also agreement among more than six in ten presenters in the survey that development of ethnic or culturally diverse audiences will be important in the future (63 per cent).

## Future of Presenting – Priorities (1)

“How important do you think that each of the following will be for the overall presenting community over the next 10 years?”



CAPACOA Presenters' Study, 2011

- Not surprisingly, those presenters that rely on government funding are more concerned about the financial stability of the arts presenting community, and fostering government relations.
- Those that present festivals and a wide variety of arts forms – nine or more – are more concerned with the future development of culturally diverse audiences than are more specialized presenters. Presenters in Western Canada, in urban centres, and those that rely on government funding and are already mandated to serve culturally diverse or Aboriginal audiences are also more inclined than other presenters to feel that attracting diverse audiences is a priority area for the future.
- The smallest arts presenting organizations (based on audience size, number of staff, and operating budget) as well as those in the smallest communities, are each more likely to be concerned about their future dependence on volunteers, compared to the average presenter. This is also a more common concern among presenters in English-speaking Canada.
- Presenters with the largest budgets are more concerned than smaller presenters about sustaining private support.
- In contrast, those with mid-sized budgets are more concerned than average with the supply of skilled workers.

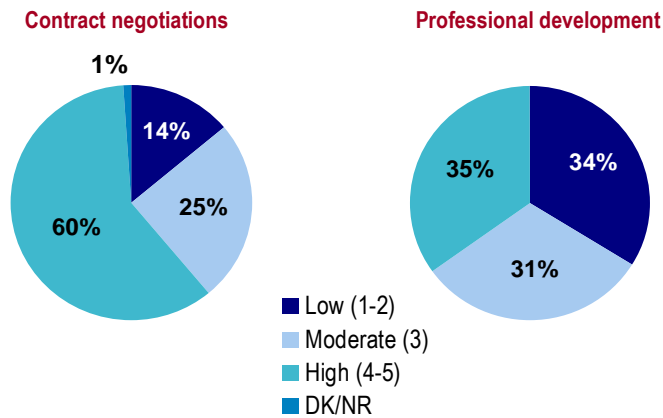
- For presenters in Eastern Canada, there is a heightened concern over competition from within the arts sector, relative to concerns expressed elsewhere in Canada.
- Francophone presenters outside of Quebec, those mandated to serve minority language audiences, and presenters that rely most on government funding are more worried than the average presenter about the future of collaboration between employers, workers and associations within the industry, and about the reliability of government funding.

#### d) Business Focus

In terms of more operational issue areas, six in ten organizations in the survey (60 per cent) say that negotiating contracts requires a high level of effort. Professional development activities, such as workshops and mentoring, are an area where just over one-third of organizations in the survey sample (35 per cent) say they spend their time.

### Business Focus

“How much effort does your organization dedicate to each of the following areas/objectives?”



EKOS Research Associates Inc.

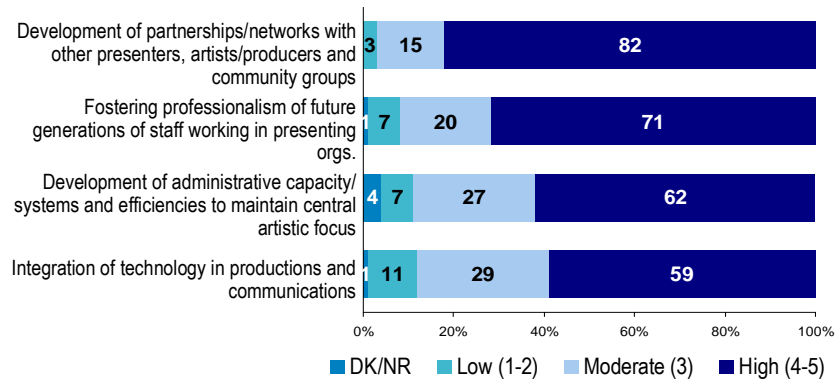
n=288

CAPACOA Presenters' Study, 2011

A high priority for presenters over the next ten years is developing partnerships and networks with other presenters, artists, producers and community groups (82 per cent of organizations in the sample rating it as very important). A strong majority of seven in ten (71 per cent) also feels that the next ten years will be important for fostering professionalism among a new generation of staff working in arts presenting. Just over six in ten presenters see developing administrative capacity to maintain a central arts focus (such as through systems and efficiencies) as a priority area (62 per cent) and there is moderate concern over how arts presenters will cope with the integration of technology into productions and communications, as demonstrated by 59 per cent that think this is an area of high importance to the arts presenting community in the next ten years.

## Future of Presenting – Priorities (2)

“How important do you think that each of the following will be for the overall presenting community over the next 10 years?”



n=288

CAPACOA Presenters' Study, 2011

- Developing partnerships is more likely to be important to organizations with a primary mandate to present the arts than it is for those where arts presentation is secondary to their mandate.
- Organizations in the west and those serving culturally diverse audiences are more likely than the average presenter to think that developing a future generation of professionals in arts presenting will be a priority.
- Organizations in the west and those serving culturally diverse audiences, Aboriginal audiences and minority language audiences are more concerned than other presenters that developing administrative capacity will be a priority in the next ten years. These organizations are also more likely to rely on government funding.
- Concern over the integration of technology into the arts is more of a concern for those that have a stake in presenting festivals compared to the average presenter.

# 5. PARTNERSHIPS

As previously described in Chapter 4, one of the most important community roles presenters are seen to play is in building partnerships with other organizations in the community. Presenters often engage in partnerships with other arts presenters or producers, community-based organizations, educational institutions and government – and many of these partnerships are with organizations outside of the arts sector (in areas such as education, communications, social sciences, cultural diversity/immigration and health). Based on patterns of responses, it is the larger presenters, as well as those involved in presenting many artistic forms that are most frequently involved in these types of partnerships. Those presenting to Aboriginal audiences are also frequently involved in partnerships, often with government organizations. Goals of these partnerships are to enrich their communities, broadening their audiences or build support for the arts, and presenters provide ample examples of these objectives having been realized through their successful partnerships. These partnerships demand a great deal of resources on the part of presenters, as evidenced by the fact that presenters are mainly establishing these partnerships on a one-on-one basis and only in about a quarter of cases do they share an equal role with their partner – most of the time, presenters take the lead.

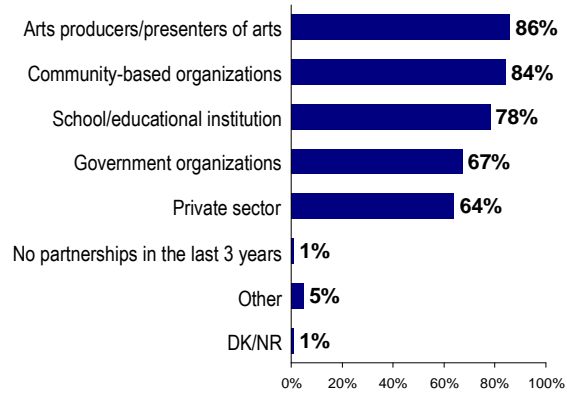
## 5.1 DETAILED FINDINGS

### a) Types of Partners

According to more than three in four arts presenters, presenters are seen to play a role in building partnerships with other organizations. With that in mind, it is not surprising to find that partnerships between arts presenters and producers or other presenters are quite common, with 86 per cent of those surveyed having embarked on such a partnership. Almost as common are partnerships with community-based organizations (84 per cent have had these as partners) and educational institutions (78 per cent). Two-thirds of responding organizations have engaged government organizations in a partnership (67 per cent) and just slightly fewer have had partnerships with the private sector (64 per cent). It is very rare that arts presenters have not had any partnerships in the past three years (only one per cent have not). It is obvious from these high figures that many presenters have engaged in several different partnerships over the last 3 years.

## Presenter Partnerships

“Which of the following types of organizations have you had partnerships with in the last 2-3 years?”



n=288

CAPACOA Presenters' Study, 2011

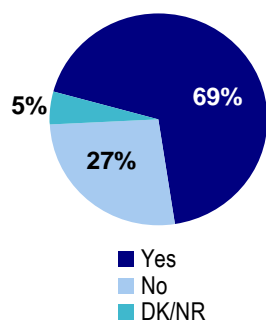


## b) Partnerships with Non-Arts Sectors

The majority of presenters responding to the survey have partnered with non-arts based organizations on specific projects (69 per cent). The most common non-arts partners are in the education sector: 69 per cent of those having worked with a non-arts partner (n=191) have worked with an educational institution. Social services, health organizations, and immigration/cultural diversity organizations are also common partners for between 29 and 37 per cent of presenters in the survey, and a small number have worked with crime prevention organizations (five per cent). A fair number of presenters have also worked with mass media and communications organizations (37 per cent). Other sectors noted by 29 per cent include tourism; sports and recreation; local businesses; commerce and economic development organizations; community centres; and service clubs. Each of these partnerships indicates a strong community role for presenters

### Involvement with Non-Arts Organizations

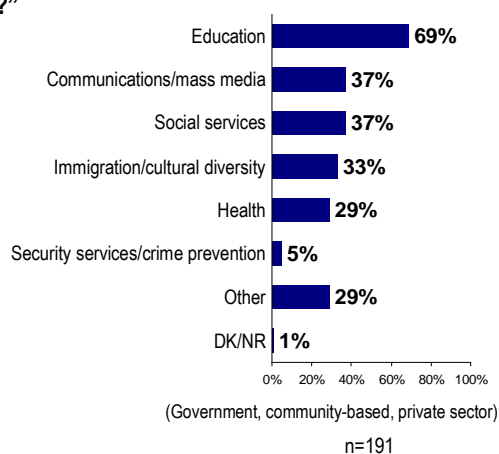
“Has your organization worked with any non-arts based organizations as partners on specific projects?”



(Other than arts producers/presenters)  
n=283



[IF YES] “What sectors are these non-arts organizations in?”



(Government, community-based, private sector)  
n=191

CAPACOA Presenters' Study, 2011

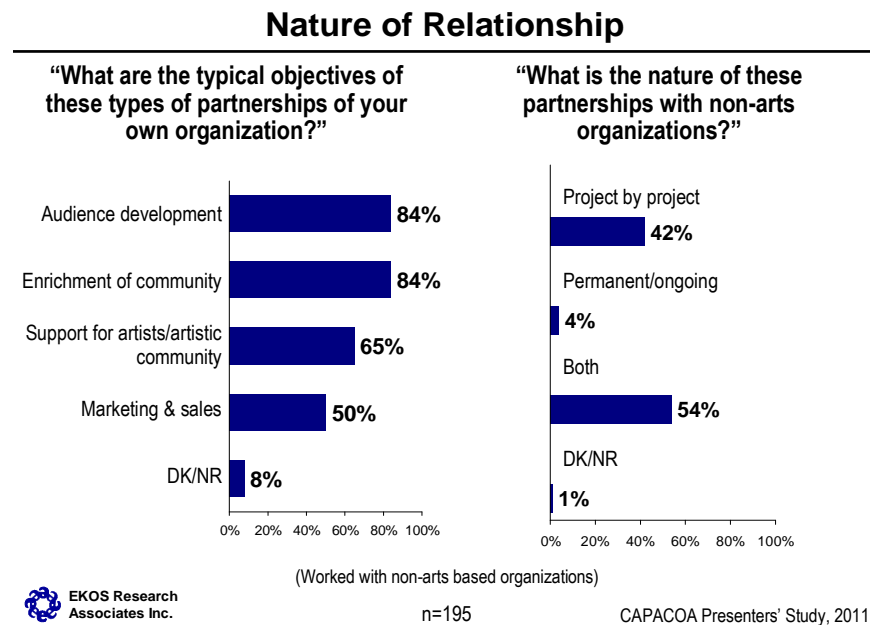
- Presenters with the largest audiences and budgets and in the largest communities are more likely to partner with others (both arts presenters or producers and non-arts organizations alike). Presenters with the most employees are more likely to have worked with various health and social service sectors, including those in crime prevention and cultural diversity.
- Francophone presenters outside of Quebec (and minority language presenters generally) are more likely to partner with educational institutions.

- Those presenting to Aboriginal audiences are more likely to hold partnerships with government organizations, as are, not surprisingly, those that rely on government funding. Partnerships with government organizations are also more common for arts presenters that deliver mainly a festival / one-off event.

### c) Nature of Partnerships

There are several major reasons why presenters are partnering with non-arts organizations. The most common basis for partnering with these organizations is to build audiences (84 per cent) and for community enrichment (84 per cent). A majority also engages in these partnerships to build support for artists or the artistic community (65 per cent). Half of presenters in the survey partner for marketing purposes or to drive sales (50 per cent).

The nature of partnerships is quite variable. Just over half of presenters (54 per cent) described at least some permanent or ongoing partnerships, as well as some that are established on a project by project basis. But for more than two in five presenters (42 per cent), each relationship is established on an individual basis.



## d) Successful Partnerships

With respect to presenters' most successful partnerships, it is often the case (for 65 per cent) that the presenter itself takes a lead role in the relationship. One-quarter (26 per cent) indicated that they and their partner(s) assumed equal roles. Just six per cent say their involvement in a successful partnership or undertaking was minor (six per cent).

Successful partnerships have been most beneficial to arts presenters for the enrichment of community that has been fostered, according to eight in ten (82 per cent). (Note that this is also well aligned with the objectives of many of these partnerships.) Audience development has also often been realized (by 63 per cent), although this is lower relative to the proportion of presenters that sought this as a goal of partnerships generally. Around half noted that their successful partnership created support for the artistic community (52 per cent) and three in ten (31 per cent) saw the partnership benefit in marketing and sales. There were some other benefits, noted by 15 per cent, awareness of issues (e.g., environmental), fundraising, and opening up opportunities for more projects or partnerships.

### Most Recent Partnership



(Worked with non-arts based organizations)



n=147

CAPACOA Presenters' Study, 2011

- Greater support for artists and artistic community is a benefit most likely to have been felt through partnerships established by presenters in Western Canada.



APPENDIX A  
SURVEY INSTRUMENT



**ENG**

**"Value of Presenting" - Presenters' Survey**

Dear Sir/Madam,

CAPACOA, <SOURCE> and other presenting networks are involved in a major collaboration across the country in *The Value of Presenting: A Study of Arts Presentation in Canada*. This study is designed to identify, understand and communicate the value and benefits of performing arts presentation for Canadians, and, define the role of the presenter in the creative chain, in communities, and in society over the next 20 years. CAPACOA has contracted EKOS Research Associates, an independent research firm, to conduct this survey of performing arts organizations.

This one of a kind, national survey is designed to draw a portrait of the Canadian presenting field and gain views and opinions of presenters. It is a central piece of the Value of Presenting Study and, likely the largest survey of its kind in the history of presenting in Canada. It is critical that the views and experiences of as many Canadian presenters as possible are captured in the survey. A number of activities are being undertaken in this study, including a series of consultations with presenters to be held across Canada over the fall and winter.

Participation in this survey is voluntary, but knowing your views is very much valued and appreciated. The survey should take only about 20 minutes to complete. Any information that you provide will remain confidential. It will be used for research purposes only. No comments will be attributed to any individual. Survey responses will not be published, but presented in aggregate form.

You will be directed to the survey by clicking on the following link:

**CLICK HERE**

Please note that this link is **unique to your own organization** and only one link can be used to complete one questionnaire for each organization. **Do NOT share this link with others.** If you have any issue with the link above please copy the following link into your browser:

Because the invitation list has been compiled from a number of different sources, it is possible that your organization may receive more than one invitation to complete the survey. We apologize in advance for any inconvenience where this occurs. If you have any questions regarding this survey, please contact EKOS Research Associates at 1-800-388-2873, or by email at [presenters@ekos.com](mailto:presenters@ekos.com).

**If you would like to send this invitation to the survey to other organizations in the presenting community, please ask them to use the following link. If you are receiving this invitation from anyone other than EKOS Research, please use the following link:**

**Insert generic link**

Thank you in advance for your participation.

Susan Galley  
EKOS Research Associates Inc.

**INTROE**

CAPACOA, <SOURCE> and other presenting networks are involved in a major collaboration across the country in *The Value of Presenting: A Study of Arts Presentation in Canada* with the goals of:

- Identifying, understanding and communicating the value and benefits of performing arts presentation for Canadians, and,
- Defining the role of the presenter in the creative chain, in communities, and in society with the next 20 years in mind.

A number of activities are being undertaken in this study, including a review of literature, in-depth interviews and a series of consultations with presenters through dialogue sessions to be held across Canada over the fall and winter.

This one of a kind, national survey is designed to draw a portrait of the Canadian presenting field and gain views and opinions of presenters. It is a central piece of The Value of Presenting Study and likely the largest survey of its kind in the history of presenting in Canada. It is critical that the views and experiences of as many Canadian presenters as possible are captured in the survey.

For information about The Value of Presenting Study, please visit [www.diffusionartspresenting.ca](http://www.diffusionartspresenting.ca).

Performing arts presentation happens in many contexts and by many different kinds of organizations and individuals. We are interested in the perspectives of those engaged in presenting who meet a number of criteria.

---

In your performing arts presentation activity, does your organization:

Apply a responsible curatorial point of view to the selection of artists you present?

- Yes..... 1  
No ..... 2



**INTROA**

Purposefully connect art, artists and audience in your performing arts presentation, rather than use performing arts as backdrop to corporate events or other business activities.

Yes..... 1

No ..... 2

**INTROB**

Present the work of some range of artists, rather than exclusively self-present your own works.

Yes..... 1

No ..... 2

**INTROC**

This survey is designed for the person responsible for presentation activities, which can range from artistic directors to general managers, depending on your specific organization’s structure. If you are not that person, please forward this survey to someone in the organization fitting this description or role.

Yes, I am a person fitting that description..... 1

No, I am not a person fitting that description, but will forward to someone else..... 2

No, I am not a person fitting that description, and will not forward the survey to anyone else ..... 3

**Q1**

Which of the following best describes your organization?

(Select the single best answer)

Government ..... 1

Schools/universities and school divisions ..... 2

Specialized presenter (e.g., specific art forms)..... 3

Festival ..... 4

Seasonal presenter (e.g., summer theatre)..... 5

Series presenter..... 6

Bar, restaurant, and other small venue ..... 7

Promoter ..... 8

Other (specify) ..... 77

**Q1B**

*Presenter, Festival, Promoter Q1*

If... Q1 = 3-6,8

Is your organization a for profit, government or not-for-profit organization?

For profit.....	1
Government .....	2
Not-for-profit .....	3
Don't know/no response .....	9

**Q1C**

*Government Q1 or Q1B*

If... Q1 = 1 OR Q1B = 2

What level of government is this organization?

Federal.....	1
Provincial.....	2
Regional/Municipal .....	3
First Nations.....	4
Don't know/no response .....	9

**Q2**

Is arts presenting the primary mandate or function of your organization?

Yes.....	1
No (please specify primary mandate) .....	77
Don't know/no response .....	99

**Q3**

Which of the following disciplines does your organization present to public audiences?

(Select all that apply)

Dance.....	1
Interdisciplinary arts (incl. circus arts).....	2
Media arts .....	3
Music/song writing .....	4
Theatre .....	5
Opera/musical theatre .....	6
Comedy/humour.....	7
Film .....	8
Literature.....	9
Spoken word/storytelling .....	10
Visual arts .....	11
Variety.....	12
Other (specify) .....	77

**Q4**

**Do you present series/seasons or single events and/or festivals?**

Series/seasons .....	1
Single event or festival.....	2
Both.....	3
Don't know/no response .....	9

**Q5**

**Does your organization present only shows produced by others or do you also produce your own shows (including, for example, building sets, lighting and sound design, hiring of individual artists, etc.)?**

Only present shows produced by others .....	1
Mostly present shows produced by others and also produce own shows .....	2
Mostly produce own shows and also present shows produced by others .....	3
Don't know/no response .....	9

**PQ6**

**How much effort does your organization dedicate to each of the following areas/objectives? (Focus on only your unit's activities, if you are part of a larger organization)**

**Q6A**

**Artistic development (residencies, artistic collaborations and developing new artistic talent)**

No effort at all 1.....	1
2.....	2
Moderate effort 3.....	3
4.....	4
Very high level of effort 5 .....	5
Don't know/ no response .....	9

**Q6B**

**Artistic activities (vision development, season/festival planning, selecting artists)**

No effort at all 1.....	1
2.....	2
Moderate effort 3.....	3
4.....	4
Very high level of effort 5 .....	5
Don't know/ no response .....	9

**Q6C**

**Contract negotiations**

No effort at all 1..... 1  
2..... 2  
Moderate effort 3..... 3  
4..... 4  
Very high level of effort 5 ..... 5  
Don't know/ no response ..... 9

**Q6D**

**Marketing and audience development**

No effort at all 1..... 1  
2..... 2  
Moderate effort 3..... 3  
4..... 4  
Very high level of effort 5 ..... 5  
Don't know/ no response ..... 9

**Q6E**

**Community/social involvement/development**

No effort at all 1..... 1  
2..... 2  
Moderate effort 3..... 3  
4..... 4  
Very high level of effort 5 ..... 5  
Don't know/ no response ..... 9

**Q6G**

**Technological advances (both relating to presentation and to changes in communications technology)**

No effort at all 1..... 1  
2..... 2  
Moderate effort 3..... 3  
4..... 4  
Very high level of effort 5 ..... 5  
Don't know/ no response ..... 9

**Q6H**

**Professional Development (workshops, mentoring)**

No effort at all 1.....	1
2.....	2
Moderate effort 3.....	3
4.....	4
Very high level of effort 5 .....	5
Don't know/ no response .....	9

**Q6I**

**Other (please specify)**

No effort at all 1.....	1
2.....	2
Moderate effort 3.....	3
4.....	4
Very high level of effort 5 .....	5
Don't know/ no response .....	9

**PQ7**

How large of a role do presenting organizations currently play in each of the following?

**Q7A**

**Discovering and exposing emerging Canadian artistic talent**

No role at all 1.....	1
2.....	2
A moderate role 3.....	3
4.....	4
A very large role 5.....	5
Don't know/ no response .....	9

**Q7B**

**Supporting artists (e.g., provide residencies or collaboration/networking opportunities, commission new works)**

No role at all 1.....	1
2.....	2
A moderate role 3.....	3
4.....	4
A very large role 5.....	5
Don't know/ no response .....	9

**Q7C**

**Connecting audiences and arts/artists from across Canada and around the world**

No role at all 1.....	1
2.....	2
A moderate role 3.....	3
4.....	4
A very large role 5.....	5
Don't know/ no response .....	9

**Q7D**

**Contributing to local or regional economic development**

No role at all 1.....	1
2.....	2
A moderate role 3.....	3
4.....	4
A very large role 5.....	5
Don't know/ no response .....	9

**Q7E**

**Raising public issues and generating public discussion**

No role at all 1.....	1
2.....	2
A moderate role 3.....	3
4.....	4
A very large role 5.....	5
Don't know/ no response .....	9

**Q7F**

**Exposing audiences to different, new and/or challenging artistic experiences**

No role at all 1.....	1
2.....	2
A moderate role 3.....	3
4.....	4
A very large role 5.....	5
Don't know/ no response .....	9

**Q7G**

**Exposing audiences to different cultures**

No role at all 1.....	1
2.....	2
A moderate role 3.....	3
4.....	4
A very large role 5.....	5
Don't know/ no response .....	9

**Q7H**

**Fostering sense of identity (i.e., national, regional or community identity)**

No role at all 1.....	1
2.....	2
A moderate role 3.....	3
4.....	4
A very large role 5.....	5
Don't know/ no response .....	9

**Q7I**

**Supporting arts education and community arts**

No role at all 1.....	1
2.....	2
A moderate role 3.....	3
4.....	4
A very large role 5.....	5
Don't know/ no response .....	9

**Q7L**

**Reaching out to new audiences and diversifying audiences**

No role at all 1.....	1
2.....	2
A moderate role 3.....	3
4.....	4
A very large role 5.....	5
Don't know/ no response .....	9

**Q7J**

**Assisting, developing and presenting local artists**

No role at all 1.....	1
2.....	2
A moderate role 3.....	3
4.....	4
A very large role 5.....	5
Don't know/ no response .....	9

**Q7K**

**Building partnerships with other organizations in the community**

No role at all 1.....	1
2.....	2
A moderate role 3.....	3
4.....	4
A very large role 5.....	5
Don't know/ no response .....	9

**Q10**

As a performing arts presenter, what do you consider the top 3 benefits of your organization to your community?

**Top 3**

Higher civic engagement.....	1	
Stronger sense of community identity or community belonging.....	2	
Better understanding between cultures.....	3	
Improved health and well-being of individuals and families .....	4	
Greater economic development.....	5	
Increased cross-sectoral collaboration (e.g., business, culture, social) .....	6	
Better capacity to attract and retain skilled workers.....	7	
More creative community.....	8	
Other (specify) .....	77	B
Other (specify) .....	78	B
Other (specify) .....	79	B
Don't know / No response.....	99	BX



**Q11**

What do you see as the greatest threats or challenges facing presenters in Canada in the next few years?

(Select up to 5 responses)

Competition from within the arts sector .....	1	
Competition from other sources of entertainment .....	2	
Demographic changes in audience (e.g., diversity, aging audiences).....	3	
Integration of technology in productions and communications .....	4	
Increased accessibility to entertainment through the Internet.....	5	
Reliability of government funding.....	6	
Sustaining corporate support .....	7	
Sustaining private support .....	8	
Fluctuations in economy.....	9	
Changing consumer tastes and behaviours .....	10	
Industry collaboration (e.g., employers, workers, associations/umbrella groups).....	11	
Supply of skilled workers (e.g., talent drain due to low wages and benefits, long/irregular hours) .....	12	
Need for/dependence on volunteers.....	13	
Other (specify) .....	77	B
Don't know/no response .....	99	BX

**PQ13**

How important do you think that each of the following will be for the overall presenting community over the next 10 years?

**Q13A**

Young audience development and arts education

Not at all important 1.....	1	
2.....	2	
Moderately important 3.....	3	
4.....	4	
Very important 5 .....	5	
Don't know/ no response .....	99	BX

**Q13B**

Audience development with ethnic/cultural groups

Not at all important 1.....	1	
2.....	2	
Moderately important 3.....	3	
4.....	4	
Very important 5 .....	5	
Don't know/ no response .....	99	BX

**Q13C**

Fostering professionalism of future generations of staff working in presenting organizations (e.g., mentoring, succession planning, professional recognition programs)

Not at all important 1.....	1	
2.....	2	
Moderately important 3.....	3	
4.....	4	
Very important 5.....	5	
Don't know/ no response .....	99	BX

**Q13D**

Development of administrative capacity, systems and efficiencies to maintain central artistic focus

Not at all important 1.....	1	
2.....	2	
Moderately important 3.....	3	
4.....	4	
Very important 5.....	5	
Don't know/ no response .....	99	BX

**Q13E**

Development of partnerships and networks with other presenters, artists and producers, and community groups

Not at all important 1.....	1	
2.....	2	
Moderately important 3.....	3	
4.....	4	
Very important 5.....	5	
Don't know/ no response .....	99	BX

**Q13F**

Financial sustainability/stable funding

Not at all important 1.....	1	
2.....	2	
Moderately important 3.....	3	
4.....	4	
Very important 5.....	5	
Don't know/ no response .....	99	BX

**Q13G**

**Government relations**

Not at all important 1.....	1	
2.....	2	
Moderately important 3.....	3	
4.....	4	
Very important 5.....	5	
Don't know/ no response .....	99	BX

**Q13H**

**Integration of technology in productions and communications**

Not at all important 1.....	1	
2.....	2	
Moderately important 3.....	3	
4.....	4	
Very important 5.....	5	
Don't know/ no response .....	99	BX

**Q14**

*If Arts producers/presenters only, skipped to Q23*

Which of the following types of organizations have you had partnerships with in the last 2-3 years?

Arts producers/presenters of arts.....	1	
Government organizations.....	2	
Community-based organizations.....	3	
School/educational institution.....	4	
Private sector.....	5	
No partnerships in the last 3 years.....	6	X
Other (specify) .....	77	
Don't know/no response .....	99	X

**Q15**

*No, skipped to Q23*

If... Q14 = 2,3,4,5,6,77,99
-----------------------------

Has your organization worked with any non-arts based organizations as partners on specific projects?

Yes.....	1
No .....	2
Don't know/no response .....	9

**Q16**

*Government, Community based, private sector Q14*

If... Q14 = 2,3,5 AND Q15 = 1

What sectors are these non-arts organizations in?

(Select all that apply)

- Education ..... 1
- Health ..... 2
- Immigration and cultural diversity ..... 3
- Security services and crime prevention ..... 4
- Social services ..... 5
- Communications/mass media ..... 6
- Other (specify) ..... 77
- Don't know/no response ..... 99 X

**Q16B**

*Yes, Q15*

If... Q15 = 1

What are the typical objectives of these types of partnerships for your own organization?

Select all that apply

- Audience development ..... 1
- Marketing and sales ..... 2
- Enrichment of community ..... 3
- Support for artists/artistic community ..... 4
- Other (specify) ..... 77
- Don't know/no response ..... 99 X

**Q17**

*Yes, Q15*

If... Q15 = 1

What is the nature of these partnerships with non-arts organizations?

- Each are formed on a project by project basis ..... 1
- Some are permanent/ongoing and some are on a project by project basis ..... 2
- Each are formed on a permanent or ongoing basis ..... 3
- Don't know/no response ..... 9

**Q18**

*Yes, Q15*

If... Q15 = 1

Are there any lessons that your organization has learned from any projects involving partnerships with non-arts organizations in the last few years? If so, could you briefly describe the main lessons?

Yes (please describe lessons learned) .....	77	
No .....	98	X
Don't know .....	99	X

**Q19**

*DK/NR Skipped to Q23*

If... Q15 = 1

Briefly describe a partnership with a non-arts organization that you have found to be particularly successful, including reasons that you think that it was successful.

(Please specify) .....	77	
Don't know/no response .....	99	X

**Q20**

*Yes, Q15*

If... Q15 = 1 AND Q19 NOT = 99

Did your organization play the lead, an equal, or a supporting role in this particular partnership?

Lead .....	1	
Equal role .....	2	
Supporting role.....	3	
Other (please specify) .....	77	
Don't know/no response .....	99	X

**Q21**

*Yes, Q15*

If... Q15 = 1 AND Q19 NOT = 99

What was the objective of this particular partnership for your own organization?

Select all that apply

Audience development .....	1	
Marketing and sales.....	2	
Enrichment of community.....	3	
Support for artists/artistic community.....	4	
Other (please specify) .....	77	
Don't know/no response .....	99	X

**Q23**

Yes, Q15

How would you describe your organization's main venue/festival site?

Owned.....	1	
Long term lease .....	2	
Rented per show .....	3	
Outdoors.....	4	
Other (please specify) .....	77	
Don't know/no response .....	99	X

**Q24**

How many different venues/festival sites, including occasional venues, did you use in your last fiscal year/annual reporting cycle?

(response) .....	1
Don't know/no response .....	999

**PQ24**

Specified Number of Venues, Q24

If... AQ24 >= 1

What is the capacity of <your (three/two main) venues/festival sites>?

**Q24A**

If... AQ24 >= 1

Venue 1

(please specify)/Capacity .....	1	M
Don't know / no response .....	99	

**Q24B**

If... AQ24 >= 2

Venue 2

(please specify)/Capacity .....	1	M
Don't know / no response .....	99	

**Q24C**

If... AQ24 >= 3

Venue 3		
(please specify)/Capacity .....	1	M
Don't know / no response .....	99	

**Q29C**

What was the approximate total attendance for all shows you presented in your last fiscal year/annual reporting cycle?

(response) .....	1	
Don't know / No response.....	9	X

**Q29CORR**

If... Q29C = 1

Please confirm that total attendance for all shows you presented in your last fiscal year was ....

Yes, continue .....	1	
No, return to modify .....	2	->Q29C

**Q25A**

*If Venue not rented per show, Q23*

If... Q23 NOT = 3

As far as you know now, is your organization intending to conduct any renovations or new capital expenditures to the venue over the next five years?

Yes.....	1
No .....	2
Don't know .....	9

**Q25B**

Yes, Q25A

If... Q25A = 1

Would this be for...?

Expansion/new construction .....	1	
Renovation/adaptive re-use .....	2	
Specialized equipment .....	3	
Feasibility study .....	4	
Other (please specify) .....	77	
Don't know/no response .....	99	X

**Q25C**

Yes, Q25A

If... Q25A = 1

What is the approximate cost that you expect to spend on renovations or new capital expenditures over the next two years?

(Please round to the nearest \$1000)

(total amount) .....	1	
Don't know / No response.....	9	X

**Q25CORR**

If... Q25C = 1

Please confirm that the approximate cost of renovations and new capital expenditures is \$ ....

Yes, continue .....	1	
No, return to modify .....	2	->Q25C

**PQ26A**

How many paid staff and volunteers are involved in the day-to-day operations of your organization?

**Q26A**

# of Paid Staff

Amount.....	1	M
None.....	998	
Don't know/no response .....	999	



**Q26B**

**# Volunteers**

Amount.....	1	M
None.....	998	
Don't know/no response .....	999	

**PQ26C**

**Festivals, Seasonal Q1**

If... Q1 = 4,5

How many paid staff and volunteers do you have at the height of your performances/productions (including all contract and hourly staff hired to run events)?

**Q26C**

If... Q1 = 4,5

**# of Paid Staff**

Amount.....	1	M
None.....	998	
Don't know/no response .....	999	

**Q26D**

If... Q1 = 4,5

**# Volunteers**

Amount.....	1	M
None.....	998	
Don't know/no response .....	999	

**Q28**

Approximately how many artists, groups and or artistic companies have you engaged in your last fiscal year/annual reporting cycle?

# of Artists..... 1  
Don't know/no response ..... 9

**Q30C**

What was your organization's annual budget for its last fiscal year/annual reporting cycle? If you are part of a larger organization, please provide the annual budget for your branch or unit.

(Please round to the nearest \$1000)

(total amount) ..... 1  
Don't know / No response..... 9 X

**Q30CORR**

If... Q30C = 1

Please confirm that your annual operating budget is \$ ....

Yes, continue ..... 1  
No, return to modify ..... 2 ->Q30C

**Q27C**

Out of the expenses you incurred in your last fiscal year/annual reporting cycle, approximately how much were your annual fees paid in contracts to artists?

(Please round to the nearest \$1000)

(total amount) ..... 1  
Don't know / No response..... 9 X

**Q27CORR**

If... Q27C = 1

Please confirm that the approximate total of annual fees paid in contracts to artists is \$ ....

- Yes, continue ..... 1
- No, return to modify ..... 2

->Q27C

**Q31**

*If location missing in list provided*

If... ISEMPTY(ACITY)

Where is your organization located?

**Q31A**

*If location missing in list provided*

If... ISEMPTY(ACITY)

- City
- Response/(Select, or specify)..... 1 MN
- Toronto ..... 2
- Montreal ..... 3
- Calgary ..... 4
- Ottawa ..... 5
- Edmonton ..... 6
- Mississauga ..... 7
- Winnipeg ..... 8
- Vancouver ..... 9
- Hamilton ..... 10
- Quebec City ..... 11
- Halifax ..... 12
- St. John’s ..... 13
- Charlottetown ..... 14
- Regina ..... 15
- Saskatoon ..... 16
- Victoria ..... 17
- London ..... 18
- Windsor ..... 19
- Kitchener-Cambridge-Waterloo ..... 20
- Other (specify) ..... 77
- Don't know / No response ..... 99

**Q32A**

*If other, Q31A*

If... Q31A = 77

How large is the city in which your organization is located (in number of residents)?

Less than 5,000 .....	1
5,000 – 19,999 .....	2
20,000 – 49,999 .....	3
50,000 – 99,999 .....	4
100,000 or more .....	5
Don't know / No response.....	9

**Q32B**

*If less than 5000, Q32A*

If... Q32A = 1

Roughly how far are you located from the nearest major urban centre?

Less than 200 kms.....	1
200 kms or more.....	2
Don't know / No response.....	9

**Q33**

Which of the following languages do you present works in?

Select as many as apply

English .....	1	
French.....	2	
Chinese.....	3	
Italian.....	4	
German.....	5	
Punjabi .....	6	
Spanish.....	7	
Aboriginal languages .....	8	
Other (please specify) .....	77	
Don't know / No response.....	99	X

**Q34**

Does your organization's mandate focus on serving one of the following segments?

Aboriginal audiences.....	1	
Minority language audiences.....	2	
Culturally diverse audiences .....	3	
None of the above.....	8	X
Don't know / No response.....	9	X

**PQ35A**

Please rank the top 5 sources of your organization’s funding in your last completed fiscal year/reporting cycle?

**Q35A**

**First**

(please specify) /Source .....	98	NM
Box office revenues .....	1	
Rental revenues .....	2	
Merchandise revenues.....	3	
Government grants.....	4	
Donations including private and Foundations .....	5	
Corporate sponsorship.....	6	
Fundraising events .....	7	
Other (specify) .....	77	
Don't know / No response.....	99	

**Q35B**

**Second**

(please specify)/Source .....	98	M
Box office revenues .....	1	
Rental revenues .....	2	
Merchandise revenues.....	3	
Government grants.....	4	
Donations including private and Foundations .....	5	
Corporate sponsorship.....	6	
Fundraising events .....	7	
Other (specify) .....	77	
Don't know / No response.....	99	

**Q35C**

**Third**

(please specify)/Source .....	98	M
Box office revenues .....	1	
Rental revenues .....	2	
Merchandise revenues.....	3	
Government grants.....	4	
Donations including private and Foundations .....	5	
Corporate sponsorship.....	6	
Fundraising events .....	7	
Other (specify) .....	77	
Don't know / No response.....	99	

**Q35D**

**Fourth**

(please specify)/Source .....	98	M
Box office revenues .....	1	
Rental revenues .....	2	
Merchandise revenues.....	3	
Government grants.....	4	
Donations including private and Foundations .....	5	
Corporate sponsorship.....	6	
Fundraising events .....	7	
Other (specify) .....	77	
Don't know / No response.....	99	

**Q35E**

**Fifth**

(please specify)/Source .....	98	M
Box office revenues .....	1	
Rental revenues .....	2	
Merchandise revenues.....	3	
Government grants.....	4	
Donations including private and Foundations .....	5	
Corporate sponsorship.....	6	
Fundraising events .....	7	
Other (specify) .....	77	
Don't know / No response.....	99	

**PQ36A**

**Government Grants, PQ35**

If... Q35A = 4 OR Q35B = 4 OR Q35C = 4 OR Q35D = 4 OR Q35E = 4

What level of government did you receive funding from in your last fiscal year?

**Q36A**

If... Q35A = 4 OR Q35B = 4 OR Q35C = 4 OR Q35D = 4 OR Q35E = 4

**Main Source**

Federal.....	1
Provincial.....	2
Regional/Municipal .....	3
First Nations.....	4
Don't know / No response.....	9

**Q36B**

If... Q35A = 4 OR Q35B = 4 OR Q35C = 4 OR Q35D = 4 OR Q35E = 4
--

<b>Other Sources</b>	
Federal.....	1
Provincial.....	2
Regional/Municipal.....	3
First Nations.....	4
No other sources .....	98 XM

**Q37**

*Optional*

Would you like to make any other comments about the scope and type of presenting your organization undertakes or other topics addressed in this survey?

(Please specify) .....	77	
No comments to add.....	98	X

**Q38**

*Optional*

If your organization has a document outlining its mission or mandate and vision for the future (and if you are able to share this documentation), please paste the text into the field below, or attach it through the field provided.

Accepted formats, .doc, .docx, .xls, .xlsx, .pdf	
(Attach mandate).....	77
(Please specify) Q38BOX .....	78

**Q39**

This study may include additional phases, focusing in more detail on specific themes with regard to performing arts presentation. May we contact you again in the future with other surveys that will help to further profile the community and explore additional topic areas?

Yes.....	77
No .....	78

**Q40**

Would you like to make any suggestions regarding particular topic areas for attention in future research into arts presenting?

(Please specify) .....	77	
No comments to add.....	98	X

**THNK**

Thank you very much for taking the time to complete the survey.

**THNK2**

Thank you very much for taking the time to visit the survey website, though unfortunately this survey does not apply to your situation.