



CANADIAN ASSOCIATION
FOR THE PERFORMING ARTS
ASSOCIATION CANADIENNE
DES ORGANISMES ARTISTIQUES

The Performing Arts and the Visitor Economy

Submission presented by CAPACOOA (Canadian Association for Performing Arts / Association Canadienne des Organismes Artistiques) as part of the Federal Tourism Growth Strategy consultation.

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Executive Summary

This brief highlights four new trends since CAPACOA's last tourism brief in 2019:

- Rising costs and socio-environmental consideration are leading travellers to make fewer but longer trips;
- Travellers are seeking a deeper connection to the places they visit and they also seek personal enrichment and wellbeing;
- Indigenous tourism is anticipated to remain an important trend;
- Better data is needed to connect visitors to the live performances they seek.

Considering past and emerging trends, CAPACOA is recommending two strategies to the federal government:

1. Provide increased funding for the presentation of performing arts events in urban, rural and remote communities, year-round;
2. Support data strategies to connect visitors to performing arts events near them.

CAPACOA also encourages performing arts organizations to connect with their local Destination Marketing Organization and to participate in data-centric initiatives.

Pre-pandemic trends

In 2019, CAPACOA published a research and policy brief entitled [Tourism, Festivals and Live Performances: Facts, Trends and Opportunities](#) in the context of the development of the initial [Federal Tourism Growth Strategy](#).

This brief described the complementary roles of festivals and performing arts events in the tourist's path to purchase:

"If festivals have a slightly greater attraction potential than live performances and sporting events before the time of departure (14% and 13% of Canadians respectively, say that they account for central travel activities), these two types of cultural events generate important participation rates once tourists have arrived at their destination."¹

"it is common [among focus group participants] to plan to attend events when travelling even though that was not the main reason for the travel."²

The brief also highlighted three trends that, at the time, were deemed to have potential positive impact on the demand for live performances by tourists:

1. A shift to new models of tourism focused on intangible experiences;
2. The "Bleisure" phenomenon, which blends business travel with leisure time; and,
3. Off-peak tourism, including winter tourism.

Even though the COVID-19 pandemic has profoundly impacted both the live performance sector³ and the broader tourism industry, findings and observations from CAPACOA's 2019 brief are still valid and relevant today.

¹ CAPACOA, *Tourism, Festivals and Live Performances: Facts, Trends and Opportunities*, 2019, p. 3. Accessed online on July 21, 2022 at: <https://capacoa.ca/en/research/tourism/>.

² Idem, p. 4.

³ Frédéric Julien, "Encouraging signs of recovery for the performing arts: National Culture Indicators for the fourth quarter of 2021", CAPACOA, 2022. Accessed online on July 21, 2022 at: <https://capacoa.ca/en/2022/04/encouraging-signs-of-recovery-for-the-performing-arts/>.

What's changed since 2019: new trends to take into consideration

Reports by Destination Canada and by Destination International published in 2021 include many noteworthy trends from the point of view of festivals and performing arts events organizers.

Fewer, longer trips

As Destination Canada observed in *Tourism's Big Shift*,⁴ the pandemic impacted the access to transport as well as transport connectivity:

“In the short to medium term, availability of transportation – both air and ground – will be limited, posing barriers to connecting travellers with their destinations. The fundamental change of airline economics globally will impact the competitiveness of Canadian aviation and overall air access. Reduced frequency on routes within Canada and, of particular importance, key international destinations, will have a prolonged impact on our recovery prospects.”⁵

The report also notes the surging prices of flights and car rentals and puts forward the assumption that “these costs impact short-term travels – such as a weekend ski holiday or shopping trip.”⁶

Since the release of this report, soaring oil prices have made travel costs more expensive than ever. In addition, shortage of labour at airports is currently making every traveler think twice before booking a flight.

Destination Canada also pointed out that business travel faces a slow return and may not recover at pre-pandemic levels.⁷ One might presume that reduced business travel could equally reduce opportunities arising from *bleisure* tourism, but it could also have the opposite effect. Travel-deprived professionals may in fact rely more than ever on their corporate travel to discover new places.

Because of reduced business travel and the growing costs and pains associated with transportation, visitors may travel less often and instead opt for longer stays. Those visitors will increasingly seek entertainment options at their destination rather than going out and about at multiple destinations to participate in several anchor activities. Their decision making will be

⁴ Destination Canada, *Tourism's Big Shift: Key Trends Shaping the Future of Canada's Tourism Industry*, 2021. Accessed online on July 21, 2022 at: <https://www.destinationcanada.com/en/research>.

⁵ Destination Canada, 2021, p. 22.

⁶ *Idem*, p. 24.

⁷ *Idem*, p. 25.

driven by different questions. They will want to consider: “What else can I do in this destination while I am there?” before asking themselves “What other nearby destinations can I go to while travelling at this destination?”. Such questions could be equally motivated by cost considerations as by socio-environmental consciousness and a desire to minimize one’s carbon footprint.

Whereas these trends could possibly have some impact upon medium and large festivals who rely on out-of-town visitors, they might at the same time open up wonderful opportunities for performing arts centres, music venues, and hundreds of organizations that present live performance series year round, in communities large and small.

Deeper connections to place and a longing for wellbeing

At a [webinar on performing arts and tourism](#) presented in November 2021,⁸ representatives from Destination Canada and Destination Toronto both mentioned the desire of visitors to connect in deeper and more meaningful ways with the places they visit. This trend is associated with the idea of “responsible travel” which “predicts travellers will want to lighten their footprint on destinations – supporting local economies, engaging with local cultures, reducing carbon emissions and enabling environmental conservation.”⁹

Speakers at the webinar also pointed out that travellers are increasingly looking for authentic experiences, and they are also seeking personal enrichment and wellbeing. These two trends are ranked highly in a recent report by Destination International. The latter is actually among the fastest rising trends in the report.¹⁰

These trends speak directly to the motivators and benefits that drive participation in the performing arts.

According to the *Arts Response Tracking Survey*, the top benefits of participating in arts and culture during the pandemic are:

- Learning and experiencing new things (28%);
- Improving mental health (24%);
- Feeling connected (18%).¹¹

⁸ “Performing Arts, Tourism and the Experience Economy: The Untapped Potential”, online event held on November 18, 2022, co-presented by CAPACOA, the Toronto Performing Arts Alliance and Mass Culture. A summary of the event by Clare Daitch is available online at:

<https://capacoa.ca/en/2022/01/performing-arts-tourism-and-the-experience-economy/>.

⁹ Destination Canada, 2021, p. 34.

¹⁰ Destinations International, *DestinationNEXT Futures Study*, 2021, p. 18. Accessed online on July 21, 2022 at: <https://destinationsinternational.org/reports/destinationnext-futures-study>.

¹¹ Nanos Research, *Arts Response Tracking Survey: February 2022*, p. 5. Accessed online on July 21, 2022 at: <http://www.businessandarts.org/resources/arts-response-tracking-study/>.

According to *The New Experience Economy*, the top motivations for attending arts and culture events include:

- To get out of the house and be social;
- To support my own mental health;
- To try something unique/different.¹²

Clearly, performing arts events and festivals are precisely the kind of offers that are apt at satisfying these growing expectations of visitors.

Indigenous connections

Indigenous tourism is anticipated to remain an important trend after the pandemic. Research conducted by the Indigenous Tourism Association of Canada (ITAC) and Destination Canada indicated that one in three Canadians are interested in Indigenous experiences and that historically, international visitors have an even higher level of interest (37%).¹³

Traditional and contemporary performing arts experiences by Indigenous artists are presented year round and everywhere – although not necessarily at Indigenous tourism destinations. They are in fact more likely to be found in urban centres than on reserve, because of the availability of performing arts facilities (or lack thereof). These events can also easily fly under the radar, because live performances by Indigenous artists are seldom specifically labelled as “Indigenous” shows. Who’s to guess that a performance by Elisapie Isaac (on the photo¹⁴), by Andrea Menard or by Michelle Olson is an Indigenous performance – unless you already know these artists are Indigenous artists?



¹² Stone-Olafson, *Building Experiences In The New Economy: Spring 2022*, p. 21. Accessed online on July 21, 2022 at: <https://www.stone-olafson.com/insights/experienceeconomy-results>.

¹³ Destination Canada, Global Tourism Watch Survey, 2019; Indigenous Tourism Association of Canada, COVID-19 Driven Interest Assessment of Canada’s Domestic Market, 2020. Cited in Destination Canada 2021.

¹⁴ Elisapie Isaac is an Inuit artist whose photos are made available for reuse under a Creative Commons license. Photo credit: Thesupermat, [CC BY-SA 4.0](https://creativecommons.org/licenses/by-sa/4.0/), via [Wikimedia Commons](https://commons.wikimedia.org/wiki/File:Elisapie_Isaac.jpg).

CAPACOA and the Indigenous Performing Arts Alliance have been working together to build a capacity for connecting locals and visitors with Indigenous performing arts experiences near them, no matter where they are and whether or not they are familiar with the outstanding Indigenous artists that live, work and create on this land.¹⁵

Better data to connect visitors to the live performances they seek

All speakers at CAPACOA's webinar on the performing arts and tourism¹⁶ referenced trends and strategies related to data.

David Robinson, from Destination Canada, observed that "Canada lags behind other OECD countries when it comes to digital maturity." "There are opportunities to work on data strategies to connect visitors to the experiences they seek," he said.

Christian Roy, from Québec Spectacles, explained how structured data can help disseminate performing arts event information in apps and devices where visitors are most likely to find them.

Sarah Jarvis, from Destination Toronto, presented a case of collaboration between performing arts organizations, Destination Toronto and the City of Toronto. They are working together to aggregate and disseminate event information to locals and visitors alike.

Ms. Jarvis also cited two new data-related trends from the *DestinationNEXT* study:

- Better data management platforms are helping optimize strategy;
- New data management platforms provide 360-degree view of customers and marketplace.¹⁷

These are not entirely new topics for the live performance industry. Since 2017, several Canadian and international research reports identified metadata as a critical issue affecting the discoverability of live performances.¹⁸ Unless information about these festival and performing arts events is transformed into reusable, standardized data, search engines are ignoring them and destination marketing organizations are having difficulties assembling comprehensive listings of events in their area.

¹⁵ Indigenous Performing Arts Alliance, *IPAA's Commitment To Open Data And Indigenous Data Sovereignty*, 2022. Accessed online on July 21, 2022 at: <https://ipaa.ca/data-sovereignty-strategy/>.

¹⁶ "Performing Arts, Tourism and the Experience Economy", 2021.

¹⁷ Destination International, 2021, p. 18.

¹⁸ Frédéric Julien, "How can arts listings be better?", on the *Linked Digital Future* blog, October 16, 2019. Accessed online on July 22, 2022 at: <https://linkeddigitalfuture.ca/2019/10/16/how-can-arts-listings-be-better/>.

Recommendations

Recommended strategies for the federal government

1. Provide increased funding for the presentation of performing arts events in urban, rural and remote communities, year-round

The federal government already has several programs that support the production and presentation of live performances. Two of these programs specifically focus on the presentation of festivals and performance series in hundreds of communities, from coast to coast, and could therefore be utilized in the Federal Growth Tourism Strategy:

- [Canada Arts Presentation Fund](#);
- [Building Communities through Arts and Heritage](#).

Investing in these programs would both support the Federal Growth Tourism Strategy and help the sector recover from the impact of the pandemic.

Recommended amounts and detailed analyses for each program will be provided in CAPACOA's pre-budget submission (forthcoming).

2. Support data strategies to connect visitors to performing arts events near them

The federal government should provide ongoing financial support for the development and maintenance of a shared open data infrastructure for the performing arts sector, as well as in building capacity for the production and reuse of open data about performing arts events.

The [Canadian Heritage Information Network](#) provides a good model that could be emulated in the performing arts sector.

Ongoing financial support in the amount of \$3 million per year would be needed to fully develop and maintain this technical infrastructure and related services.

Recommended strategies for the live performance sector

Deeper collaboration between the live performance and the tourism sector

The DestinationNEXT report sees destination alignment as one of three transformational opportunities:

“Destinations of all sizes are more competitive in the global visitor economy when government, community and industry priorities are aligned as much as possible.”¹⁹

Performing arts and festival organizations are strongly encouraged to connect and collaborate with their local Destination Marketing Organization or their regional tourism association.

Participate in data strategies to connect visitors (and locals) to performing arts events

There are many ways for live performance organizations to participate in the data-centric transformation of the sector.

- Ask your industry association what opportunities and services they offer with regards to descriptive metadata and open data.
- Check the [Mastering Discoverability for the Performing Arts](#) playbook²⁰ to find out what actions you take.
- Visit linkeddigitalfuture.ca to find out more.

About CAPACOA

The Canadian Association for the Performing Arts / l'Association canadienne des organismes artistiques (CAPACOA) is a national arts service organization for the performing arts touring and presenting community. CAPACOA represents 150 professional for-profit and not-for-profit presenters, festivals, presenter networks, artistic companies, agents, managers and other stakeholders working across the presenting and touring sector in Canada. Collectively, our network members represent nearly 2000 professional and volunteer organizations, associations and companies. CAPACOA's mission is to cultivate a vibrant, healthy and equitable performing arts ecosystem, from artists to audiences.

¹⁹ Destination International, p. 25.

²⁰ Inga Petri, *Mastering Discoverability for the Performing Arts: Your Guide to Building Your Online Profile Through Structured Data and Linked Open Data Directories*, 2021. Accessed online on July 22, 2022 at: <https://digitalartsnation.ca/digital-playbook/mastering-discoverability-for-the-performing-arts/>.