



# *the* value *of* presenting

**A Study of Performing Arts Presentation in Canada**

By Inga Petri, Strategic Moves

Commissioned by



CANADIAN ARTS  
PRESENTING ASSOCIATION  
ASSOCIATION CANADIENNE  
DES ORGANISMES ARTISTIQUES

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*The Value of Presenting: A Study of Performing Arts Presentation in Canada (2011-2013)* has been prepared for the Canadian presenting networks, their members and all who are interested in the future of performing arts presentation in Canada. Comprehensive documentation is available on the project website at [www.valueofpresenting.ca](http://www.valueofpresenting.ca) as well as [www.capacoa.ca](http://www.capacoa.ca).

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- CanDance
- CAPACOA
- Canadian Institute of Theatre Technology
- CCI – Ontario Presenting Network
- Creative City Network of Canada
- La danse sur les routes du Québec
- Manitoba Arts Network
- MT Space
- N3 Network
- Ontario Council of Folk Festivals
- Organization of Saskatchewan Arts Councils
- Prairie Debut
- Performance Creation Canada
- RADARTS
- Réseau des grands espaces
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## Contents

<b>INTRODUCTION .....</b>	<b>3</b>
Goals .....	3
Scope of Exploration .....	4
Methodology.....	4
Detailed Reports.....	5
<b>CANADIAN HISTORY OF PERFORMING ARTS PRESENTING.....</b>	<b>5</b>
Presenting Networks .....	10
<b>PERFORMING ARTS ECOSYSTEM .....</b>	<b>11</b>
Functions of a Presenter.....	12
Types of Presenters.....	14
Importance of Volunteers .....	16
<b>PERFORMING ARTS ARE EVERYWHERE.....</b>	<b>17</b>
In Everyday Language .....	17
In Various Venues .....	17
In Media .....	19
<b>PERFORMING ARTS ARE FOR EVERYONE.....</b>	<b>20</b>
Disciplines Attended.....	22
Attendance by Age .....	22
Reconciling the Attendance Gap .....	23
Importance of Attending in Person .....	25
Public Engagement in the Arts.....	26
<b>BENEFITS OF PERFORMING ARTS PRESENTATION .....</b>	<b>28</b>
The Individual and Community Benefit Equally.....	28
Levels of Benefits.....	29
Individual Benefits .....	29
Community Benefits .....	32
Benefits to Society.....	33
Partnerships Contribute to Creative Communities.....	39
<b>CHARTING A WAY FORWARD.....</b>	<b>42</b>
Demographic Change to 2031.....	42
Age.....	42
Aboriginal Population .....	43
Immigration.....	43
Technology Advances .....	44
An Adaptable Sector in a Dynamic World.....	46
<b>LIST OF VIDEOS.....</b>	<b>47</b>
<b>ANNOTATIONS.....</b>	<b>48</b>

# Attendance *of the* Performing Arts in Canada

The performing arts reach across socio-economic differences.

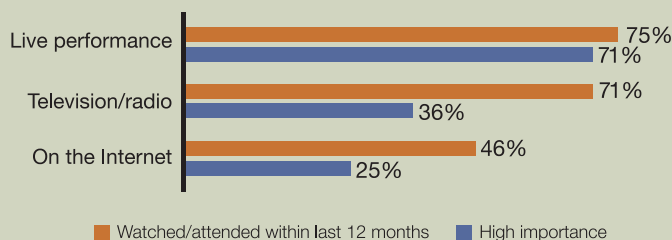


2 in 3 Canadians who:

- earn less than \$40,000, or
- do not have university education, or
- live in communities with a population under 25,000 ... attended a live performance in 2011.

Media viewing of performing arts augments attendance, rather than displaces it.

## Live performance versus media

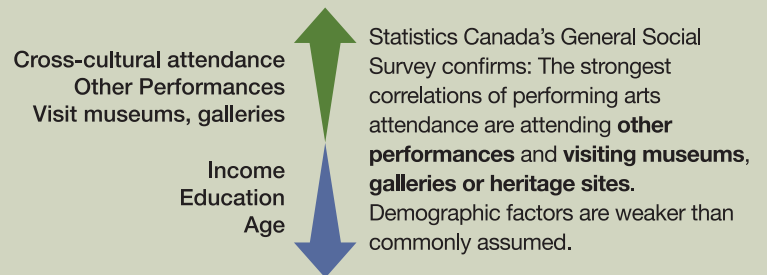


Canadians say **live attendance is twice as important** as watching a performance via media.

**Media enhances access:** 75% of non-attendees watch performance in media

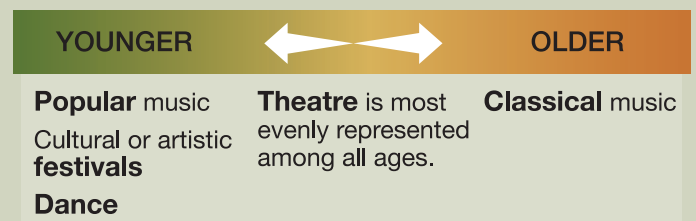
**Media deepens engagement:** 94% of frequent attendees watch, too.

The more someone attends performances, the more they will attend.

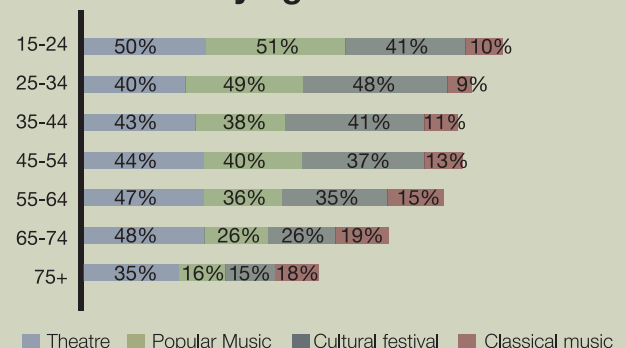


Canadians under 35 years attend more than older Canadians.

Younger Canadians are more likely to attend than older ones: **83% of 18-34** < > **70% of 55+**



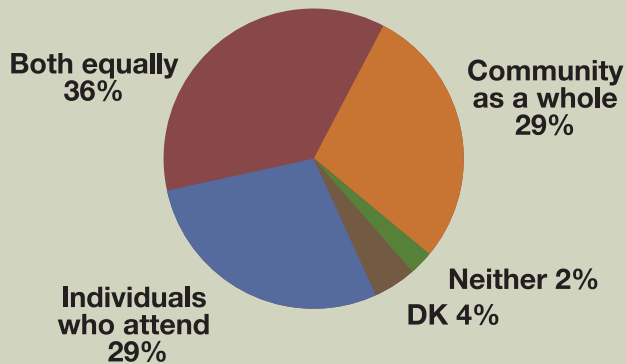
## Attendance by age - 2010



# Benefits *of* Performing Arts Presentation

Canadians believe that the performing arts benefit their communities, whether or not they attend.

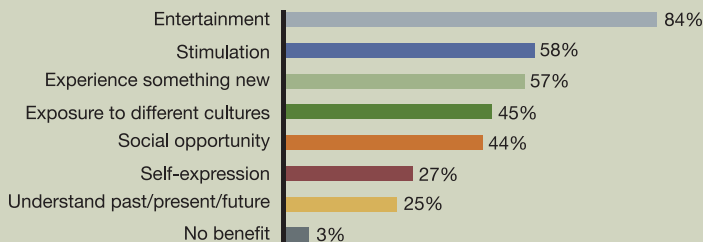
Who benefits more? (N=1,031)



92% of Canadians believe that arts and culture make a community a **better place** to live.

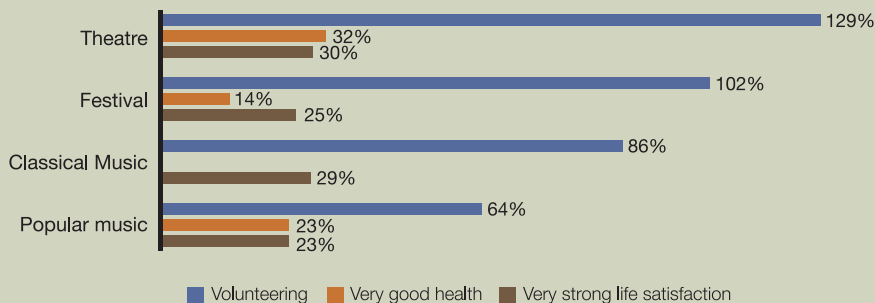
90% of Canadians say that performing arts facilities are important to **quality of life**, sense of **pride** in community and **economic** development.

Individual benefits (N=1,021)



There is a strong correlation between attending performing arts and health, well-being and civic engagement.

Effects of attendance on well-being



Source: The Arts and Individual Well-Being in Canada 2010, Hill Strategies

Canadians spent \$1.4 billion on live performing arts in 2008; more than double their spending on professional sports.

## Benefits *to* Individuals



Entertainment, fun  
**Stimulation**  
(intellect, emotion, spirit)  
Experience something new  
**Exposure to different cultures**  
Social opportunities  
Health and **well-being**

## Benefits *to* Community

**Energy and vitality**  
Quality of life  
Creative communities  
**Understanding** between cultures  
**Pride** and belonging  
Community safety



## Benefits *to* Society

Volunteering  
**Civic engagement**  
Better education outcomes  
**Social** cohesion  
Economic **development**

## INTRODUCTION

*The Value of Presenting: A Study of Performing Arts Presentation in Canada* (2011-2013) is the culmination of two years of intensive study and exploration designed to envision performing arts presenters' current and future roles within the performing arts ecosystem, in their communities and in society at large. This study was commissioned by the Canadian Arts Presenting Association (CAPACOA), in partnership with the regional and other presenting networks and an advisory committee of sector representatives. The research and consultations process was designed and undertaken by Strategic Moves in collaboration with EKOS Research Associates for quantitative surveying.

This work represents the largest pan-Canadian study to date in the performing arts presenting field. It was designed to take into consideration several trends that affect the performing arts sector:

- **Demographic changes:** Canada is undergoing tremendous demographic shifts due to an aging population, changes in immigration patterns, the rapid growth of aboriginal populations and continuing urbanization.
- **Technological changes:** The rapid evolution of Internet and mobile technologies has been creating new information and entertainment options and induced changes in customer behaviour, increased indirect competition and created both new challenges and opportunities for the arts sector as a whole.
- **Market fragmentation:** Audiences have much greater choice of arts, cultural and other leisure experiences resulting often in smaller niche audiences, which creates concerns for the financial sustainability of existing arts presenting organizations.
- **Evolution of artistic genres:** Artists' interest in and capacity to create across traditional boundaries has increased, resulting in new interdisciplinary practices and media arts.
- **Municipal cultural planning:** The concept of creative cities has become more widely accepted, even though as a relatively recent discipline, it continues to be faced with challenges as the priorities of cities and communities evolve.
- **Economic uncertainty:** The global financial crisis that began in the USA in 2007 and resulted in a recession in Canada and many other countries, was followed by a slow recovery phase. The resulting continued economic uncertainty and threats of government funding cuts creates challenges for much of the performing arts sector in terms of the reliability of public funding, corporate sponsorship and individual donations.

## GOALS

- To identify, understand and communicate the value and benefits of performing arts presentation for Canadians.
- To define and raise awareness of the role of the presenter in the performing arts ecosystem, in communities and in society with the next 20 years in mind.
- To identify commonalities and differences among diverse segments of the presenting field.



To achieve these goals, we explored live performing arts presentation from the diverse perspectives of artists, creators, producers, technical crews, agents and managers as well as municipalities, people working in related sectors like health, social services or education, funders, the public and presenters themselves.

## SCOPE OF EXPLORATION

This study is focused on live, professional performing arts in Canada. The performing arts include the complete range of classical and popular music (pop, rock, jazz, hip-hop and so on); ballet, contemporary and other forms of dance; theatrical performances ranging from drama to comedy, from dinner theatre to musical theatre including Broadway; opera and circus arts as well as spoken word and storytelling. Arts and cultural festivals are also included, even though some of these are not primarily about the performing arts.

Canadians can attend live performances in many different venues, beyond traditional soft-seat theatres and concert halls. That means venues also included restaurants and bars, public spaces like libraries, community centres or schools, museums, places of worship, outdoor spaces, stadiums and circuses as well as private spaces.

Audiences, presenters and other stakeholders consulted live in cities, towns and villages in all ten provinces and three territories of Canada. No consideration was given to whether performers live in Canada.

## METHODOLOGY

We employed a participatory action research framework where data and information was shared in draft form throughout the 2-year project on the dedicated project website at [www.valueofpresenting.ca](http://www.valueofpresenting.ca). Feedback, input and discussion was encouraged through social media and workshops on an ongoing basis. Research activities included:

- *Literature Review* was prepared in 2011 and updated in April 2012.
- *Historic Overview of Presenting* was prepared in 2011 and updated in April 2012.
- In-depth interviews with 45 contributors from within the presenting and touring sectors, funders, education, health and social services.
- *Survey of Performing Arts Presenters*, 288 respondents; report published in February 2012, including a French executive summary and detailed tables.<sup>1</sup>
- *Survey of the General Public*, 1,031 respondents; report published in March 2012, including a French executive summary and detailed tables.<sup>2</sup>
  - Additional surveying of 57 francophones living outside Quebec for a total sample of 103 for a supplemental report on Canada's francophonie.
- 23 workshops and presentations and seven webinars with 1,087 participants. Seven of these activities were conducted in French; all others in English. Results were published in the language of activity on [www.valueofpresenting.ca](http://www.valueofpresenting.ca) following each workshop.



- Impact11: Staging Displacement/Producing and Presenting Difference (Kitchener, ON)
- RIDEAU Annual General Meeting (Montreal, QC)
- First Annual Arts Champions Congress 2011 (Calgary, AB)
- Contact East 2011 (Summerside, PEI)
- OCFE 2011 Conference (Niagara Falls, ON)
- Alberta Showcase 2011 (Edmonton, AB)
- Breakout West 2011 (Whitehorse, YK)
- FrancoFête en Acadie 2011 (Moncton, NB)
- CAPACOA Conference 2011 (Toronto, ON)
- Parcours Danse 2011 (Montreal, QC)
- Contact ontariois 2012 (Ottawa, ON)
- CITT Rendez-vous 2012 (London, ON)
- Contact Ouest 2012 (Whitehorse, YK)
- Contact East 2012 (Fredericton, NB)
- MRIA Prairie Chapter (Winnipeg, MB)
- Manitoba Showcase 2012 (Virden, MB)
- Alberta Showcase 2012 (Fort Saskatchewan, AB)
- Conférence nationale de l'ACD/Canadian Dance Assembly (Ottawa, ON)
- Creative City Summit 2012 (Victoria, BC)
- BC Touring Council/Arts Alliance Workshop (Vancouver, BC)
- CAPACOA 25<sup>th</sup> Anniversary Conference 2013 – 3 workshops (Toronto, ON)

## DETAILED REPORTS

All reports and documentation are available at [www.valueofpresenting.ca](http://www.valueofpresenting.ca), including:

- The detailed reports with comprehensive methodological information and bilingual tables for both the *Survey of Performing Arts Presenters* and the *Survey of the General Public*.
- Four supplementary reports on 1) *Presenting and Aboriginal Communities*, 2) *Rural and Northern Canada*, 3) *Dance: The Evolution of Canadians' Attendance*, and 4) *La diffusion des arts vivants dans la francophonie canadienne*.
- Summaries of findings from interviews, consultations and workshops



35 workshop participants at Manitoba Showcase in October 2012.

## CANADIAN HISTORY OF PERFORMING ARTS PRESENTING

The performing arts in Canada have much deeper roots than one might expect<sup>3</sup>. Long before European explorers came to Canada, aboriginal peoples had a rich, artistic life including music, dance, theatre and storytelling. These deep artistic traditions have been part of this land for millennia. Nonetheless, development of theatre and performing arts in Canada has been shaped mostly by European rather than indigenous traditions.

The first documented theatrical performance in North America took place in Samuel de Champlain's settlement of Port Royal (near today's Annapolis Royal, NS), in 1606. It told the story of sailors travelling to the New World and their encounter with Neptune, god of the sea. It was a theatrical performance by sailors, encouraged by the governing body for the health and well-being of the people.

In colonial times, plays were performed by troops in taverns and public buildings. Concerts, modeled on London society's musical evening soirees, were presented in homes of newly arrived politicians and businessmen in the early 1800s. Dance arrived in the late 1800s via European and American touring companies.



*The Theatre of Neptune, the first play in Canada, is depicted in this drawing. Credit: Library and Archives Canada, Acc. No. 1972-26-83*

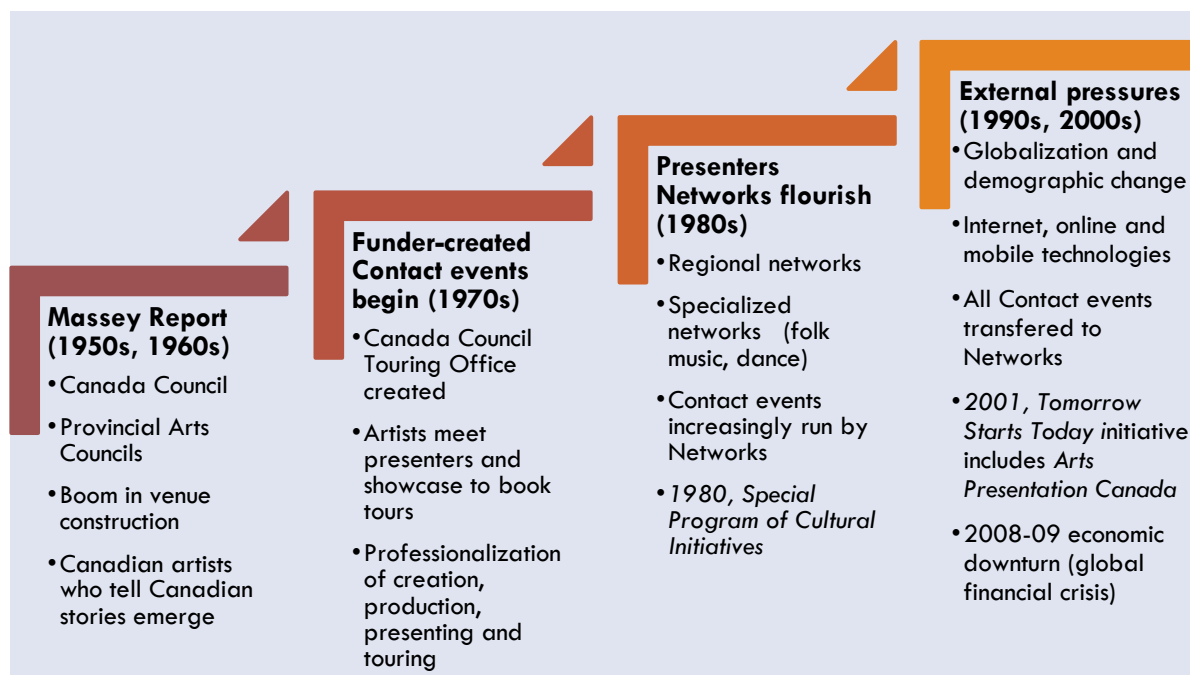
With rising industrialization, growing populations and accessibility of Canada's west, theatres began to appear across Canada. The then-famous Pantages vaudeville and movie theatre empire extended into Canada, building venues for up to 2,000 people who flocked to theatrical, musical, dance and vaudeville performances. Most of these featured touring companies and artists, although arts institutions, performance ensembles and musical clubs were growing in cities across the country, all of which fostered the development and promotion of Canadian talent.

The 1920s and '30s saw the rise of community concert associations, the travelling Chautauqua festivals and Little Theatres bringing multi-faceted performances to communities of all sizes. Dance took a leap forward in the 1950s thanks to the immigration of prominent ballet teachers.

The Massey-Levesque Report on the Royal Commission on National Development in the Arts, Letters and Sciences in 1951 led to the creation of the Canada Council for the Arts in 1957. With greater government support, and Canada's Centennial celebrations, new theatres were planned or built in many cities across Canada throughout the 1960s and beyond.

Regional presenting networks began to appear as early as 1968 in Saskatchewan. The Ontario Arts Council created Ontario Contact in 1971, the first Contact event in Canada, in order to support and coordinate touring activity by bringing artists and presenters together. The Canada Council's Touring Office, established in 1973, further enhanced Council's role to support performance and make the performing arts accessible to all Canadians. The Touring Office created Contact East in 1975; the same year the Organization of Saskatchewan Arts Councils held its first Contact Showcase. These initiatives were crucial to increasing the number of Canadian artists touring across Canada and complemented efforts to increase international touring by Canadian companies.

The 1970s were, relatively speaking, a heyday for Canada's performing arts. Theatre saw the emergence of a distinct Canadian voice. Canadian orchestras were numerous and very active. Modern dance troupes took flight. All disciplines enjoyed an expansive era, with an explosion of niche or specialized art forms and appeal to every audience taste.



Several aboriginal theatre and performance companies were founded during the 1980s that continue to operate today, including Native Earth Performing Arts (1982), De-ba-jeh-muh-jig Theatre (1984) and Ondinnok (1985). Concurrently, there has been a rise of aboriginal arts service organizations, training opportunities and spaces where new works can be created. Today, while there has been a marked increase in the number and voices of aboriginal artists and performance creation companies, there is a sense of a persistent lack of professional spaces for aboriginal works.

In 1980, the federal government created the *Special Program of Cultural Initiatives*, a two-year program with a budget of \$29.4 million managed by the Department of Communications. One component, *Special Events of a National Character or Significance*

(\$7.6 million), ultimately left a large legacy. Initially designed to fund one-time activities, it attracted applications from organizations across Canada to stage special festivals and events. The program soon discovered that these events returned for annual funding. The current wealth of arts and cultural festivals can be attributed in part to this program. Indeed, festivals have become a major contributor to Canada's cultural, social and economic life: from nurturing new work in dance to fostering the international cachet of major tourism attractions like Montreal Jazz Festival and London's TD Sunfest, to bringing together diverse communities in a common cultural space. The program was renamed *Cultural Initiatives Program* in 1982 and was renewed until 2001, when it was integrated into the *Arts Presentation Canada* program (later renamed *Canada Arts Presentation Fund*), as part of the *Tomorrow Starts Today* initiative.

The 1980s and '90s were characterized by persistent financial problems, and many companies folded or down-sized. These pressures led, however, to an overall improvement in marketing, fundraising and management capacities, and necessarily very high performance standards. In 1996, the *Remettre l'art au monde* policy in Quebec affirmed the role of the performing arts presenter. Since then, presenters have taken a major role in the development of, and access to, performing arts. Better definition of their multi-faceted functions, in turn, supported further policy breakthroughs.

In 2001, the *Tomorrow Starts Today* suite of programs was created with encouragement from CAPACOA and RIDEAU, the largest presenting network in Quebec. It continues to represent a major policy statement in support of presenting in Canada; for the first time, it shifted ongoing federal funding to presenting activities, rather than only being focused on individual events. *Tomorrow Starts Today* included two critical programs for presenters:

- *Canada Arts Presentation Fund* (formerly *Arts Presentation Canada*), designed to provide Canadians access to artistic experiences; it was the first national program that supported multi-disciplinary series presenters. The initial program allocation was \$72 million over three years.
- *Canada Cultural Spaces Fund* (formerly *Cultural Spaces Canada*), contributes to the construction and renovation of arts facilities and the acquisition and renewal of equipment. Its allocation was \$80 million over three years.

As a result of funding from the Canada Cultural Spaces Fund, community-based professional venues have been built outside of urban centres thereby increasing access for Canadians.

The professionalization of the presenting field began to accelerate across the country. In 2007, presenting organizations in Quebec set out their priorities and further illuminated and affirmed the role of performing arts presentation through the *Forum national sur la diffusion des arts de la scène*, organized by RIDEAU and its partners. In the same year, the Cultural Human Resources Council in collaboration with the presenting sector published a comprehensive profile of the wide-ranging artistic, marketing and managerial competencies of presenters<sup>4</sup>.

Management of Contact events was progressively transferred from public funding agencies to the presenting networks across Canada. With the focus of networks on either specific geographies or art forms, these events have become an effective tool in convening presenters, marketing touring artists and coordinating bookings. Moreover, during the early 2000s, Canada's francophone minorities outside of Quebec have been organizing networks and Contact events that serve a broader cultural spectrum including the performing arts.

Today, Canada's performing arts landscape spans from traditional forms like theatre, to contemporary dance and music genres to circus arts. Interdisciplinary creation has been part and parcel of performing arts since earliest times and continues to evolve alongside with artistic expression, technical capabilities, audiences and the funding environment. Gradually, different performance traditions that reflect the diversity of Canada's immigrant and aboriginal populations are gaining recognition in the mainstream of Canada's cultural life.

Now, *The Value of Presenting: A Study of Performing Arts Presentation in Canada* – together with its comprehensive research documentation – seeks to provide the underpinnings in terms of context and information to build toward a common vision for performing arts presentation for the next generation.



*The Capitol Theatre in Moncton, NB, was authentically restored to its original Pantages/vaudeville design of 1922. It re-opened as a performing arts centre in 1993.*

*Photo: Courtesy of Capitol Theatre.*

## PRESENTING NETWORKS

Over the last 40 years about 40 presenting networks have been founded. Presenting networks provide presenters with a marketplace to do business – often through Contact events – and with professional development opportunities and tools. They offer specialized services such as block booking, which improves the touring conditions for artists and increases the cost-efficiency of touring activities, thereby enabling presenters to deliver more benefits to more communities.

They play an important role in championing the presenting sector to its partners in the touring sector and public funders.

This table shows the founding dates of some of Canada's regional and specialized presenting networks and references early Contact events.

	Presenting Network	Founded	"Contact" Events
OSAC	Organization of Saskatchewan Arts Councils	1968	1975 OSAC Showcase
BCTC	British Columbia Touring Council	1976	1976 Pacific Contact
	Debut Atlantic	1979	
RIDEAU	Réseau indépendant des diffuseurs d'événements artistiques unis	1984	RIDEAU was formed from predecessor Réseau Accès (1978). 1988 Bourse RIDEAU
CAPACOA	Canadian Arts Presenting Association (National Arts Service Organization)	1985	1988 Annual Conference
OCCF	Ontario Council of Folk Festivals	1986	1986 Annual Conference
MAN	Manitoba Arts Network	1988	
CCI	Ontario Presenting Network	1988	1971 Ontario Contact started by Ontario Arts Council; in 2001 transferred to CCI-Ontario Presenting Network
ATAA	Arts Touring Alliance of Alberta	1993	1978 Alberta Showcase
CAFF	Canadian Association of Fringe Festivals	1994	
	Prairie Debut	1995	
	Réseau Ontario	1997	1979 Contact ontariois <sup>5</sup> , in 2001 transferred to Réseau Ontario
	La danse sur les routes	1997	1999 Parcours Danse
	Les Voyagements	1997	
WRAD	Western Roots Artistic Directors	1999	Informal meetings since the 1970s
APA	Atlantic Presenters Association	2001	1975 Contact East started by Canada Council; in 2001 transferred to APA
CanDance	Canadian Network of Dance Presenters	2001	Network meetings since 1985
RADARTS	Réseau atlantique de diffusion des arts de la scène	2001	La FrancoFête en Acadie since 1996
	Jazz Festivals Canada	2003	Convened in 1999
PCC	Performance Creation Canada	2004	Informal network
RGE	Réseau des Grands Espaces	2007	2005 Contact Ouest
N3	N3 Network (Northern Presenters)	2011	Convened in 2011



## PERFORMING ARTS ECOSYSTEM

An ecosystem describes the connection between a group of living things and how they interact with their environment. The performing arts ecosystem includes a diverse array of players – creators and producers, agents and managers, presenters, venue managers, stage technicians and funders – who are interdependent and who have to be able to adapt to internal and external factors.

In this ecosystem, creation comes from the imaginations of playwrights, choreographers, composers and storytellers. Their material is used by independent artists, groups or companies to produce performances. These producing companies work with artistic and production staff, in areas including set and costume design, props, stage carpentry, lighting, sound and technical crews. Producing artists and companies may be represented by agents and managers who actively seek touring, and in some cases broadcast or recording opportunities.

Presenters select touring-ready performances and pay artists' fees to producers. They provide the venue, supply technical support and promote events. Of note, in the music industry, particularly in the for-profit sector, the presenter is more commonly referred to as a "promoter."

This ecosystem benefits from public funding for the creation and production of performances by Canadians, for presenters to stage performances and bring touring artists to their communities, and for access programs to ensure the arts are available to Canadians.

Non-arts sectors also form part of this ecosystem. For instance, schools may act as presenters; municipalities own or operate performing arts centres to meet the demand for cultural services; health and social services use professional performing arts presentations to reap the proven benefits that attendance brings to their clients.

The performing arts ecosystem is fluid: people and organizations can take on different roles at different times. For instance, a theatre production company might act as a festival presenter and a venue-based presenter might commission some original work or have an artist-in-residence program. A festival presenter might augment its programming with a school-based, year-round program. Some artists become presenters of their own works and of other artists' performances. Similarly, the public has become broadly defined not only as



*This video captures the complexity and fluidity of the performing arts ecosystem.*



attendees but as participants. They purchase tickets, they make donations to arts organizations, they volunteer by serving on a board or helping at festivals and community-based venues, and they, at times, are participants in artistic experiences<sup>6</sup>.

Depending on the geographic and political context, this ecosystem has evolved somewhat differently. In Quebec, for example, the performing arts benefit from strong cultural policies that support and delineate creation, production and presentation. In this distinct context, presenters are much less likely to undertake both producing and presenting functions. In rural Canada, community-based, volunteer-run presenting organizations dominate the landscape. In large cities, presenters benefit from the availability of purpose-built venues and professional artists and producing companies working in different disciplines to form collaborative creative partnerships.

## FUNCTIONS OF A PRESENTER

Today, performing arts presenters are an essential conduit for bringing performing artists and touring acts together with audiences in communities across Canada.

Music, theatre, dance, comedy, storytelling, spoken word, opera, musicals, interdisciplinary arts are all part of the performing arts scene in Canada today. Additionally, some presenters offer other cultural experiences from visual and media arts to film, literature and more. While a specialized presenter tends to focus on one art form or a specific aesthetic, multi-disciplinary presenters program several of these art forms.

Which of the following disciplines does your organization present to public audiences?	
Music/songwriting	83%
Theatre	58%
Dance	55%
Comedy/humour	51%
Spoken word/ storytelling	42%
Variety	41%
Interdisciplinary arts (incl. circus arts)	39%
Opera/musical theatre	29%
Visual arts	43%
Film	33%
Literature	23%
Media arts	19%
Other	9%
N=288	
Source: Value of Presenting – Survey of Performing Arts Presenters, 2012 (EKOS Research Associates / CAPACOA)	

Based on their own artistic vision, presenters plan a season or a festival by selecting performances produced by professional artists, groups or companies. They have the requisite knowledge of artistic products and the skill to research productions in order to assess their quality and their feasibility technically and in terms of marketability.

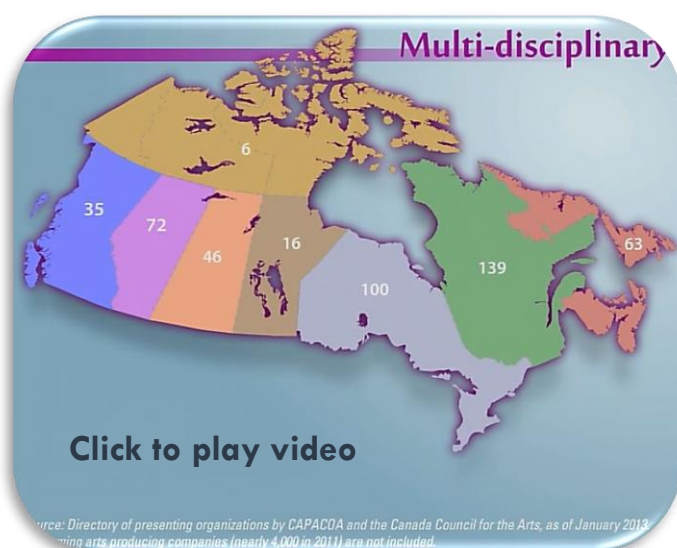
They negotiate contracts and pay artists' fees to producers. They operate or rent a specialized facility, a suitable venue or outdoor site. Presenters often organize audience development and/or outreach activities and they market the events. Moreover, they are responsible for managerial functions, like financial and human resource management, maintaining relationships with funders, donors and sponsors and working closely with their organizations' governing bodies.<sup>7</sup>

Especially in the non-profit community-based sector, presenters are often balancing their presenting and promoting activities within a mandate to serve the public good. A few are also involved with getting productions ready to tour, usually working through networks.

Finally, many presenters are also community leaders. To this end, they know not only their audiences but also understand the needs within their community. And they often work in multi-faceted partnerships that both advance their own artistic vision and help meet their communities' goals through the performing arts.

In short, performing arts presenters share a common passion for supporting emerging and established artists; developing audiences by connecting their artistic vision and programming choices with their local market; and building community.

To achieve their purpose, many presenters participate in presenting networks across Canada.



*This video shows the distribution of presenters by major art forms in Canada.*

## TYPES OF PRESENTERS

A hallmark of the presenting field is its enormous diversity. Presenters range in artistic focus, size, venues, audiences and organization. Some organize a few performances in their small rural community each year; others present festivals and extensive performing arts series in several disciplines year-round. Audiences range from a few hundred to hundreds of thousands.

Presenters work in a wide variety of environments from non-profit arts organizations to municipalities, from universities and schools to festivals. Some presenting organizations are comprised strictly of volunteers, while others are professionally run. There are increasing numbers of multi-disciplinary presenters who put on performances in several disciplines. And there are many organizations that present professional performing arts occasionally even though their primary mandate is not focused on performing arts. Furthermore, some artists and producing companies undertake presenting activities, beyond presenting their own works.



*In 1894, the 3,500-seat Massey Hall was opened in downtown Toronto. It quickly became famous as Canada's most important venue for concerts and lectures, attracting many celebrities.*

*Photo: Courtesy of Massey Hall.*

**Major categories of presenters include<sup>8</sup>:**

### **Community Presenters (Volunteer)**

Community presenters are usually volunteer-based, non-profit organizations that organize performances in their communities. Some undertake just one or two concerts a year; others present dozen as part of a multi-disciplinary program. (Example: Bragg Creek Performing Arts, Bragg Creek, AB)

### **Venue-based Presenters (Municipal/university/college/independent)**

Many presenters operate their own venue or maintain long-term leases. Venue-based presenters are generally staffed by paid professionals working in administration, operations, box office, technical/production and marketing. They may be municipal or university employees or they may be employed by a non-profit arts organization that operates a venue. Volunteers usually are involved with facility presenters. Venue-based presenters are often multi-disciplinary, however, they may promote programming in a single art form such as dance, jazz or classical music. They often take care of facility rentals in addition to their own presenting program. (Example: Northern Arts and Cultural Centre, Yellowknife, NWT)

### **Festivals**

Most of the festivals in Canada are non-profit organizations. Some are discipline specific (e.g. offering a particular type of music or work for children) and some are multi-disciplinary, including those that offer non-performing cultural activities like food, visual art or crafts. Festivals may not have many year-round employees: they generally depend on a large group of volunteers and short-term contract employees. (Example: Harrison Festival for the Arts in Harrison Hot Springs, BC; Luminato in Toronto, ON)

### **Specialized presenters**

Specialized presenters generally work with a specific art form or well-defined aesthetic. They are most often found in major urban centres or mid-sized cities. (Examples: La Maison Théâtre, Montreal, QC; New Works, Vancouver, BC)

### **Artist-presenters**

Sometimes artists undertake a self-presentation engagement or they create presenting opportunities for their peers. In this case, the artist coordinates the logistics and covers the expenses with box office income to offset them. Artist-presenters are particularly active in art forms like folk music and storytelling – especially through house concerts and volunteer presenting – and emerging interdisciplinary arts that aren't easily categorized. There are also several groups where artist-presenters – and independent producers – are quite common including among aboriginal artists, immigrant artists and francophone minorities. (Example: Two Women Productions, Lanark, ON)

### **Libraries, Schools and School Divisions**

Libraries, schools and, occasionally, school divisions are also presenters of performances and workshops. Sometimes, they are collaborators, co-presenting events with a local presenting organization or simply committing to purchasing tickets for a school matinee performance. (Example: Quill Lake School, Quill Lake, SK)

### **Occasional Presenters**

- **Charity organizations** may book a performer for a fundraiser.
- **Retailers**, including art galleries, bookstores, malls, coffee houses and restaurants.
- **Colleges and universities**, where individual departments and student clubs book artists.
- **Civic groups**. From local community fairs to neighbourhood block parties to Canada Day Celebrations, there are many community events that feature performances. In smaller communities, it is usually a volunteer organization like an agricultural society that puts on the fair and books the talent. In larger communities, the event may be the responsibility of a government department who contracts an independent presenter to book artists.

## IMPORTANCE OF VOLUNTEERS

Volunteers enable much of performing arts presentation to function. The *Survey of Performing Arts Presenters* and recent Statistics Canada data on volunteering reinforce this fact<sup>9</sup>.

Statistics Canada reports that those Canadians who volunteer in the arts and culture sector gave on average more time (127 hours per year) than those in any other sector in 2010. This represents an increase of 21% since 2007, the largest increase of any sector examined at a time when 6 out of 12 sectors registered a decline. This commitment is significant compared to other sectors where there are more Canadians volunteering but spending on average less time. When considered in terms of total hours, the amount of volunteer time equates to about 100 million hours. That is equivalent to more than 50,000 full-time jobs.

Presenters who participated in the *Survey of Performing Arts Presenters* provided information on the number of staff and volunteers. Over half of survey participants report more volunteers than staff. The average ratio of volunteers is 17 for each paid staff member. This is considerably higher in organizations that present in a festival format where it is 25 volunteers to one paid staff member. In other words, festival presenters engage on average nearly 200 volunteers, at the height of their operations, although a small segment engage 600 or more. In organizations that present series this ratio is closer to six volunteers for each staff member.

The profound reliance on volunteers is even more evident among presenters of entire programming seasons in small communities under 5,000 people. They 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 during the height of their operations.

This strong volunteer commitment proves the value Canadians see in performing arts presenting; and the invaluable role they play in bringing artists to their communities.



Cynthia Soudin and  
KoboTown.  
Alianait Arts Festival,  
Iqaluit, Nunavut, 2009.  
Photo: Ed Maruyama

## PERFORMING ARTS ARE EVERYWHERE

### IN EVERYDAY LANGUAGE

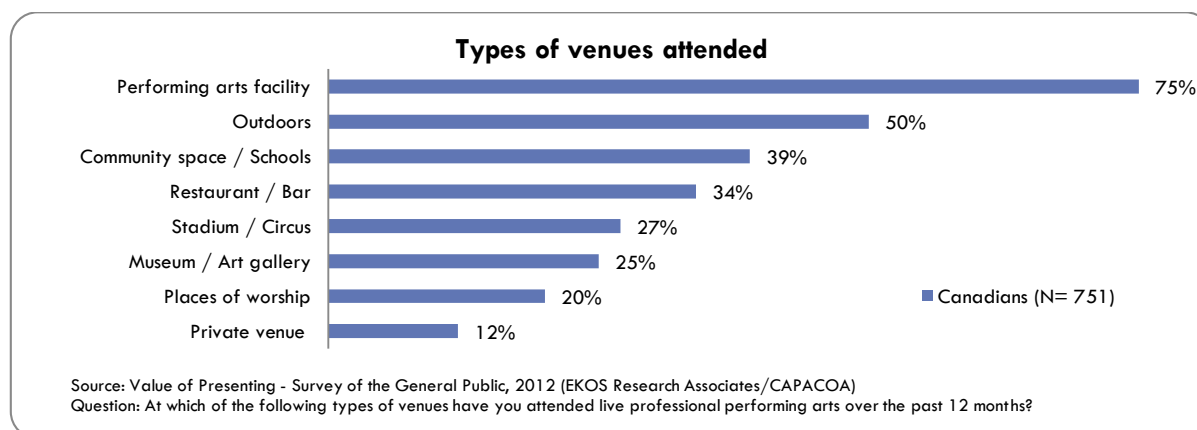
Let's *set the stage* ▪ He *took centre stage*.  
She *set the scene* for something ▪ He *knows his lines*.  
He *peeked behind the scenes*.  
He *danced around* an issue ▪ She *dances to another tune*.  
She was *out of step* with someone ▪ He *hit all the right notes*.  
He had to *face the music* ▪ This was *music to his ears*!  
They *orchestrated* an event.



These popular phrases highlight the pervasiveness of the performing arts in everyday language which reflects the widespread influence they have in Canadian culture and Canadians' lives.

### IN VARIOUS VENUES

In the *Survey of the General Public*, we learned that Canadians attend performances in many different kinds of venues. 3 in 4 Canadians attend at dedicated facilities like purpose-built theatres and concert halls. Outdoor venues receive the second highest mentions with 50%. Given the hundreds of arts and cultural festivals that take place in small and large communities across Canada, this figure is not surprising. There are also many non-specialized venues where performances are staged. Community spaces like community or cultural centres, schools or libraries are mentioned by about 4 in 10 Canadians and restaurants or bars by 1 in 3. About 1 in 4 report having attended a live performance in a general purpose stadium or at a circus as well as in museums or public art galleries. Finally, some Canadians attend live performances in places of worship and in private venues such as those used for house concerts.





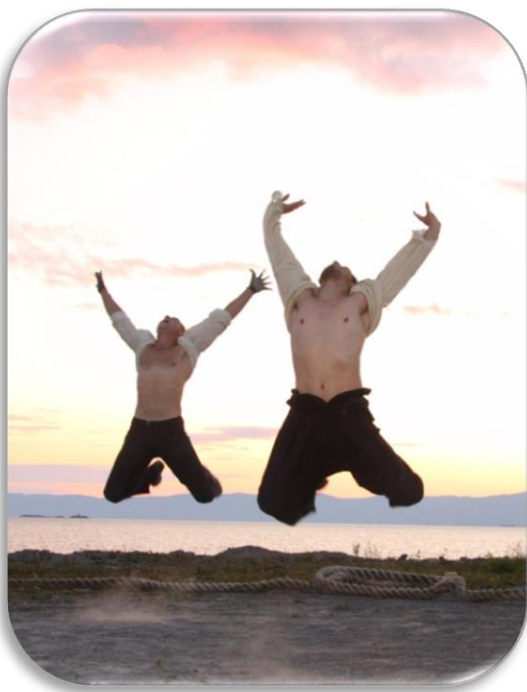
Further, Canadian Heritage<sup>10</sup> found that Canadians ranked performing arts centres next to libraries as the most important cultural venue in their community.

In rural and remote communities, where presenting organizations are often entirely volunteer-run, few have the benefit of specialized performing arts venues. There are also venues that have an unrelated primary function such as a school, an art gallery or a sports stadium. Such facilities at times are simply rented by a presenter in order to put on a show. At other times, for instance, a school or a museum can act as a presenter by curating their own programming.

This breadth of the presenting field was also evident in the *Survey of Performing Arts Presenters*, where 71% of the 288 responding presenters reported using more than one venue during a typical year. Additionally, 31% of these presenters reported having a primary mandate other than arts presenting.

Finally, since a large number of presenters have a primary business purpose other than presenting their activities are not captured through Statistics Canada's business statistics. As a result CAPACOA has been undertaking a comprehensive count of organizations that undertake presenting activities and has identified about 1,400 as of early 2013. This number is expected to rise as more occasional and artist-presenters are identified.

Considering this wide range of venues and types of presenters, it is clear that not all live professional performing arts are presented by professional presenters who work in dedicated arts organizations. Rather live professional performance is part of many kinds of activities in the lives of Canadians.

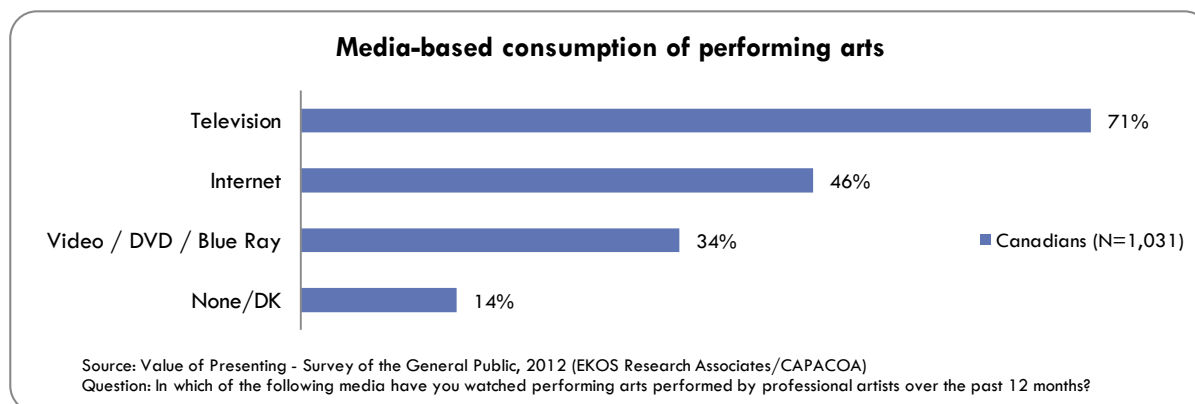


1.2.3 les pieds dans l'eau.  
By Fleuve | Espace danse.  
Photo: Pilar Macias



## IN MEDIA

According to the *Survey of the General Public*, 86% of Canadians report having watched a performance by professional artists in various media in 2011. Television ranks first with 71%, followed by nearly half who watch on the Internet through YouTube, Vimeo or other streaming services. About one-third have watched performances on DVD or video.



Subgroup analysis showed that 94% of people who attend live performances also watch performances in media. At the same time, 75% of those who did not attend any live performances within the past year, reported media-based consumption during this time. These findings confirm first, that media has an additive effect by increasing engagement among attenders, and second, that media provides an important avenue for participation for non-attenders.

The Ontario Arts Engagement<sup>11</sup> study also found a correlation between watching performing arts on TV or listening on the radio to attendance. However, while engagement through media was high, greater importance was given to live attendance. In conclusion, this study points to media as having an important place within the performing arts ecosystem.

## PERFORMING ARTS ARE FOR EVERYONE

Statistics Canada's 2010 General Social Survey and the Value of Presenting study's Survey of the General Public measured the highest attendance at live performing arts ever in Canada, with 72.4% and 75% respectively<sup>12</sup>.

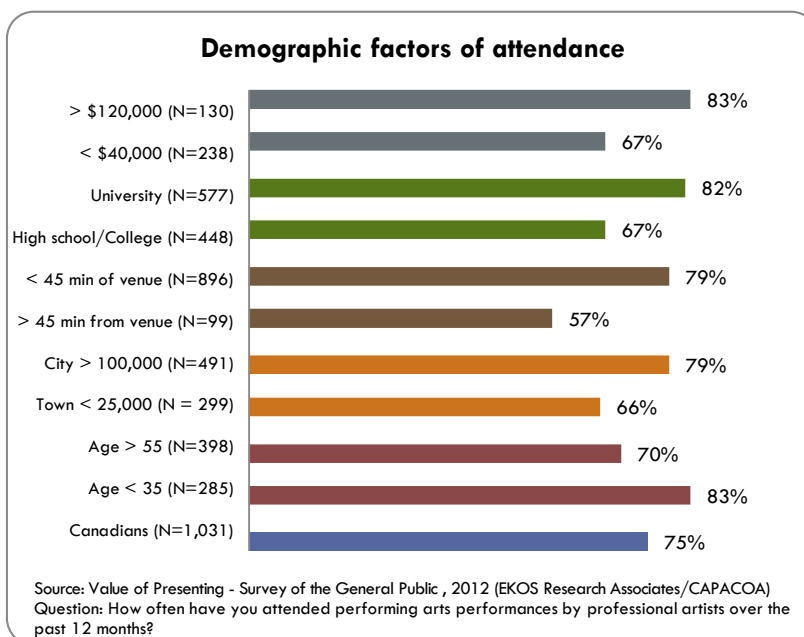
Not only have 3 in 4 Canadians attended a performance within the past year, 86% report having attended a performing arts event at some time in the past<sup>13</sup>. Moreover, 2 in 3 Canadians who earn less than \$40,000 reported attending a live performance within the past year. As well, 2 in 3 Canadians who do not have university education as well as those who are living in small communities with a population under 25,000 reported attending. This new

**3 in 4 Canadians reported attending a live professional performing arts event in 2011 at least once, confirming that the performing arts reach across socio-economic differences.**

data confirms that live professional performing arts are part of the mainstream of ordinary Canadians. Rather than merely catering to a small elite-segment of the population, the performing arts reach across socio-economic and cultural differences. This data also suggests that presenters' efforts in concert with funders, artists and producers have increased access to the performing arts for Canadians.

In analysis of various subgroups several demographic factors show statistically significant correlations related to attendance or frequency of attendance:

- Younger Canadians embrace live performing arts at high levels; 84% of the 25-34 age group reported attending a live performance in 2011 compared to 70% of 55 plus.
- More people living in larger cities and those within 45 minutes of a performing arts venue attend than those living in smaller and outlying communities.
- Those with incomes over \$120,000 or university education attend at higher rates than those earning less than \$40,000 or with high school or college education. They also attend more frequently; by income



34% of higher earners attend 5 or more times per year, compared to 24% for the lower earners. 37% of university graduates attend 5 or more times per year, compared to 11% of those with high school and 21% with college education.

***The more someone attends,  
the more they will attend;  
cultural crossovers are more  
important than demographics  
like age or income.***

These high levels of attendance by all groups suggest that demographic factors like income and education are either weaker than commonly assumed or in the case of age show the opposite of common concerns. On the other hand, access and availability of the performing arts in various communities across Canada continues to be an issue.

In some consultations presenters have maintained that there is no or little price elasticity in the arts. This claim essentially says that the number of seats sold to a performance is largely independent of the price charged. It appears this assumption was intrinsically linked to a belief that people with higher education and higher income were much more likely to attend the arts; and they could afford or prioritize whatever shows they wanted to see. In light of the current audience being much more broadly based in society, this assumption must be re-examined carefully on a case by case basis. Presenters may need to shift their thinking about their audiences to a much more nuanced understanding of the role price and the specific offer plays in their attendance patterns.

This conclusion is supported by Hill Strategies' report on *Factors in Canadians' Arts Attendance* report<sup>14</sup>. The most important correlations to attending a live performing arts event are attending other performances as well as visiting galleries, heritage sites or museums. The report affirms that other "cultural experiences and exposure appear to be more important factors in arts attendance than demographic factors. ... For example, someone with less than a secondary school diploma was not very likely to attend a play in 2010: only 32% did so. However, someone with the same education level who attended a classical concert in 2010 was much more likely to attend the theatre: 59% did so in 2010 ... The strength of the cultural crossovers is similar for each of the arts activities examined."

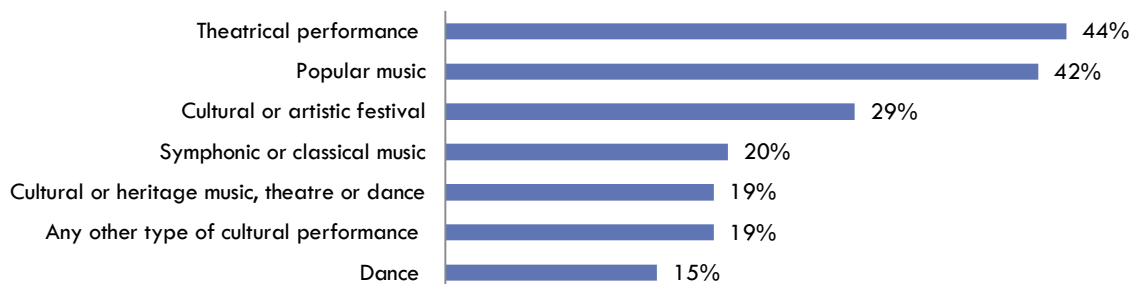
***Understanding that Canadians attend at the  
highest rates ever measured means that  
presenters need to ask themselves not how to  
motivate people to attend live shows, but rather  
they need to think about programming, the  
customer experience and how to connect their  
offer with the 75% of Canadians who attended  
live professional performing arts in 2011.***

Furthermore, Canadian Heritage<sup>15</sup> found that only 43% said the number of facilities in their community is good or very good. Just over half (53%) positively rate the quality of arts and culture facilities. This confirms that Canadians believe gaps related to availability and quality of performing arts facilities persist.

## DISCIPLINES ATTENDED

The *Survey of the General Public* replicated Statistics Canada's questions from the 2005 *General Social Survey* and, in the case of dance, from 1998<sup>16</sup>. Based on a comparison of the time series data, attendance at every art form appears to have increased compared to prior years. Since 1998, theatre, popular and classical music as well as dance appear to have roughly doubled in reported attendance. This is important information for a sector that has been pre-occupied with sustaining and developing audiences.

**Attendance of live performance by Canadians**



Source: Value of Presenting - Survey of the General Public, 2012 (EKOS Research Associates/CAPACOA)

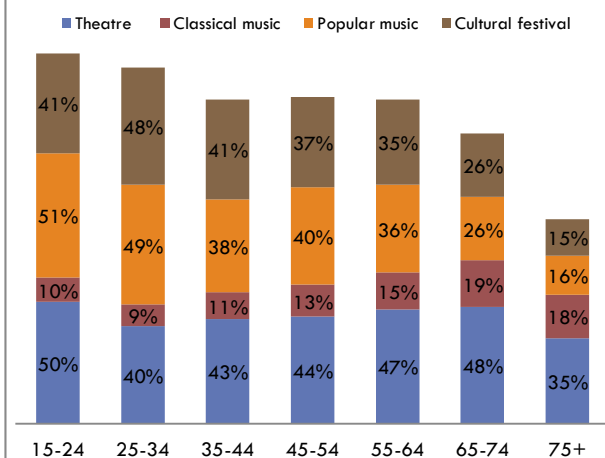
Question: Which of the following types of performing arts performances by professional artists have you attended during the past 12 months as a leisure activity (not for paid work or studies)?

## ATTENDANCE BY AGE

A persistent concern in the performing arts sector has been its ability to attract younger audiences to live performances. Several recent surveys have shown, however, that younger

Canadians attend the arts at higher rates than older Canadians.

**Attendance of performing arts by age group, 2010**



Source: Factors in Canadians' Arts Attendance in 2010, Hill Strategies, based on Statistics Canada's 2010 General Social Survey

Using Statistics Canada's large data set of over 7,500<sup>17</sup> phone interviews from the 2010 *General Social Survey*, Hill Strategies has analyzed Canadians' attendance at four disciplines: theatrical performance, classical and popular music and cultural festivals.

As we found in the *Survey of the General Public*, the two youngest age groups attend these live performing arts at higher rates than the two oldest age groups. Theatre shows a relatively

even age profile, while classical music clearly has an aging audience. Attendance at popular music and cultural festivals is most prevalent among with the youngest age groups, but persists across all ages at lower rates.

A unique study of participation in cultural activities<sup>18</sup> using Quebec's cultural statistics provides a longitudinal perspective on attendance by examining patterns in ten-year increments from 1979 to 2009 for the baby boom generation. This study showed that baby boomers attended at slightly higher rates over this 40-year span with dance rising by one percentage point, theatre by three points and music by nine points. The study also examined the 25-34 and the 55-64 age groups for each of these ten-year increments. While attendance by the 55-64 group rose for the performing arts measured from 1979 to 2009, the 25-34 group's attendance showed a decline in theatre, a slight increase in dance and a strong increase in music.

This analysis challenges across-the-board assumptions about younger Canadians interest in and attendance of various performing arts. These trends merit further examination in terms of connecting artistic offers with audiences and in terms of understanding shifts in audience interests.

## RECONCILING THE ATTENDANCE GAP

In discussions with the presenting field, it was clear that the field's pre-occupation with audience development stems from a lack of growth or a decline in audiences for specific presenters or venues. How can the breadth of attendance reported by Canadians, and in particular the level of attendance reported by younger Canadians, be true at the same time as the challenges reported by the presenting field in terms of sustaining audiences and ticket revenues?

Several explanations are borne out in the *Value of Presenting* study findings:

- **First**, the *Survey of the General Public* study and the *2010 General Social Survey* simply analyzed attendance, not whether the event was ticketed or revenue implications.
- **Second**, Canadians attend live professional performances in both traditional and non-traditional venues, including outdoor venues. Many types of festival and events include a live professional performance as one of several activities. Further, presenters themselves have established access programs that attract a broader cross-section of the population, often through lower or free admission. That allows Canadians to identify having attended a live professional performance without necessarily having bought a ticket or being captured in the presenting sector's statistics.
- **Third**, the data includes attendance of Canadians while travelling away from home or out of the country and excludes attendance by residents of other countries while in Canada.
- **Fourth**, given the similar rates of attendance reported in both the *Survey of the General Public* which specified a live performance by professional artists and the *2010 General*

*Social Survey* which dropped the reference to professional artists, Canadians appear to have no reliable means to know whether a performance is by professional artists. While these definitions exist within the sector and for determining funding eligibility, they are not easily identified by Canadians.

- **Fifth**, the definitions used are broad and do not only include “high art.” There is a persistent sense that high art is a defining characteristic over commercially successful art, a viewpoint reinforced by some public funding criteria. While robust discussions of quality and artistic merit are useful, Canadians themselves say they attend performing arts first and foremost to be entertained and stimulated in a variety of ways. (Quality of performance may well be a prerequisite.) In essence, the dichotomy of “art” versus “entertainment” is not as meaningful to audiences or the general public.
- **Sixth**, there is some softening of what matches Canadians’ definition of attending live performance. 29% equated watching a show live on TV with attending live and another 16% equated live streaming on the Internet with live attendance. Interestingly, Canadians over 55 were about twice as likely as Canadians under 25 to equate these activities. This question had not been asked in published surveys before. Therefore, this concept merits further exploration to learn how it might affect behaviour as well as survey responses relating to attendance over time.

Each of these factors have been identified by the field as key to understanding the gap in reported attendance by Canadians themselves and the experience of dealing with stagnant or shrinking audiences for specific presenters or in specific venues.



Arrested Development performs  
at the Calgary Folk Music Festival.  
Photo: Dave Kenney

## IMPORTANCE OF ATTENDING IN PERSON

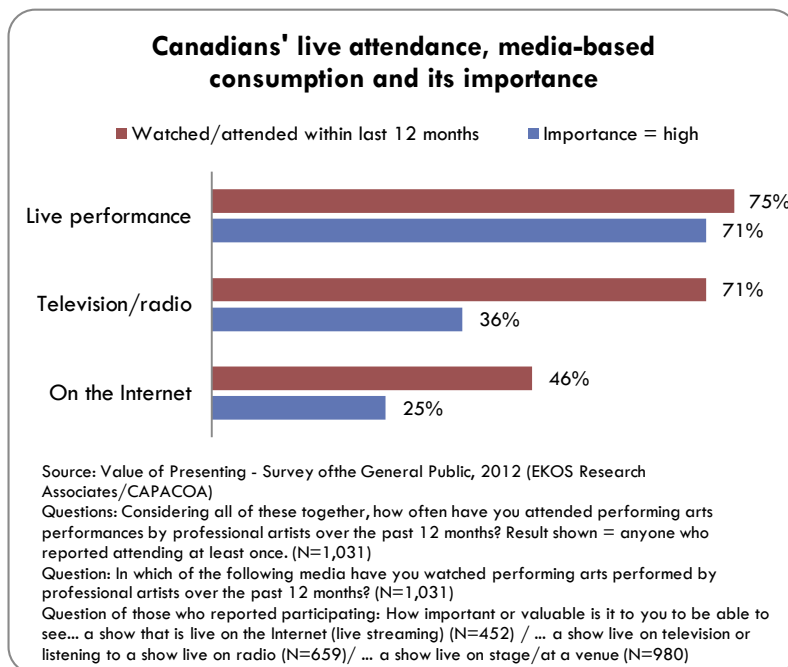
The *Survey of the General Public* found that even though 86% of Canadians engage with professional performing arts beyond live, in-person presentations, those who used these formats are twice as likely to assign high importance to attending a live performance as to any media-based consumption.

Not surprising, it is the most frequent attendees (94% of 5 plus times in 2011 report high importance) and those who have attended at

least three different types of performing arts events (90% high importance) that ascribe the highest value to attendance in their life. Women placed higher importance on their attendance (75%) than men (66%). Evidence of the appreciation of presenting lies in the fact that nearly half of Canadians who did not attend a performing arts presentation in the past 12 months say that attending is of high importance to them.

Higher than average importance of media-based watching appears driven by access issues to some degree: 42% of those living in small communities under 25,000, 49% without post-secondary education, 43% of those with income below \$40,000, and 57% who reported being disabled in some way all reported high importance to see a show live on TV or listen live on the radio. The 55 plus age group reported higher than average importance for both watching a show live on TV (45%) and watching a show that was recorded live to be watched later (41% versus average of 35%).

Similar results were found in the *Ontario Arts Engagement Study*<sup>19</sup> which reported the six most important arts activities for Ontarians were attending various live performing arts events. Their measure of salience to frequency showed that the importance of attending performing arts was high even for those who cannot or do not attend frequently, indicating that the live experience of performing arts is widely appreciated.





## PUBLIC ENGAGEMENT IN THE ARTS

Presenters and others in the performing arts ecosystem and in other cultural sectors have been considering their responsibilities to not only their audiences but their community. Canada Council for the Arts has joined this conversation with a recent discussion paper on *Public Engagement in the Arts*<sup>20</sup>. This sets an important new signal because it promises that:

*"[The Council] will take a more active role in advancing a public conversation on the expressive needs and aspirations of the citizenry at large, and by broadening its messaging to make clearer how the Council's work in the professional arts sector benefits all Canadians. While staying true to its ongoing focus on professional arts practice, it will highlight the contribution that art and artists make to everyday life .... In the process it will find direct and indirect ways to help artists and arts organizations deepen and expand their engagement with audiences."*  
(Canada Council for the Arts, 2011-16 Strategic and Corporate Plan)

Council used this encompassing definition of public engagement:

*"Actively engaging more people in the artistic life of society notably through attendance, observation, curation, active participation, co-creation, learning, cultural mediation and creative self-expression."*

During a workshop at the CAPACOA 2013 Conference on public engagement and the demographics of attendance, several themes were reinforced:

- Presenters believe that the public is already strongly engaged in the arts – this view is affirmed by the high attendance rates reported by Canadians and the high importance they ascribe to attending – and that more can be done to engage the public at large.
- Many affirmed the view that presenters provide an essential service to their communities; that connecting their community to the arts is their mission similar to libraries and museums.
- Presenters felt that it was useful to consider their markets, i.e. those audience segments from which revenue is generated, separately from their communities, i.e. the publics a presenter serves as part of their mission to bring the benefits of the performing arts to a wide audience.
- They also agreed that whatever they do, they have to be profitable or important enough as a service to be



Presenting networks in Alberta partner to showcase bilingual artists for young people.

financially sustainable. The skill sets and additional costs associated with public engagement activities were an important planning consideration.

- Presenters agreed that there is a great deal of room for improvement in telling their stories of audience and public engagement that they undertake. Effective storytelling is needed so that the public, peers and funders know the extent of public engagement that presenters, often working in collaboration with artists, provide. This also could lead to better methods of evaluation of these activities.
- Many current public engagement activities are not tied to ticket sales and are often made available without charge. These activities have become integral in many presenting organizations. They include talk backs after theatre performances, master classes with visiting artists, *In conversation* sessions with playwrights, choreographers or directors, educational programs in schools, educational websites, YouTube channels for interviews, behind the scenes activities for the public.

Presenters welcomed the idea of Council supporting professional artists to hone the skills needed to design and deliver public engagement activities with a range of audiences that may or may not be usually seen in the theatre or concert hall.



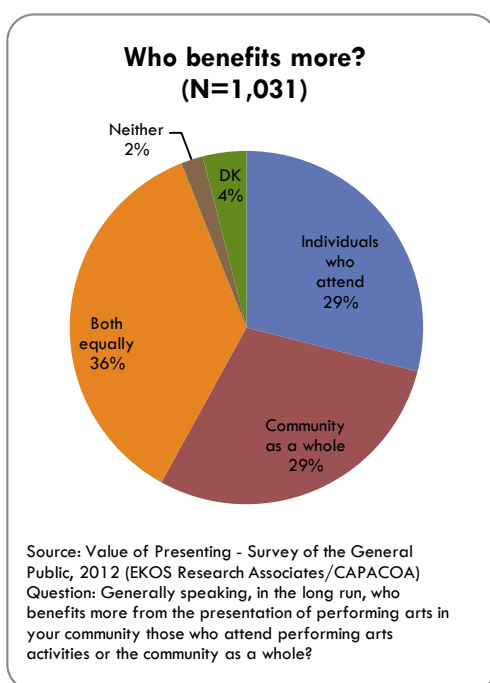
*Petits Bonheurs: an event for pre-school-aged children.*

*Photo: Michel Pinault*

## BENEFITS OF PERFORMING ARTS PRESENTATION

Studies have examined various dimensions of how Canadians perceive the performing arts, but none had tried to understand these benefits in terms of the presenter's function or to evaluate whether presenters and Canadians identify benefits in the same ways. We also wanted to test the hypothesis that the performing arts are not for a higher income elite only. The *Value of Presenting Study* undertook two surveys, one each with Canadians and presenters, and led conversations with members of the presenting field to test assumptions and close gaps in information.

### THE INDIVIDUAL AND COMMUNITY BENEFIT EQUALLY



The *Survey of the General Public* shows for the first time that Canadians believe that the presentation of performing arts equally benefits the individual who attends and the community as a whole.

Subgroup analysis revealed some statistically significant differences. Canadians who did not attend a live performance within the past 12 months still recognized the benefit of attending for individuals but at a lower rate (24%) than those who attended. On the other hand, the more frequent attenders tended to attribute benefit to both equally more strongly (42%). People living in communities with a population under 25,000, identified the benefit to the community more strongly (34%) and to the individual attending less strongly (24%). This

pattern repeated itself with those with the lowest level of education and income attributing greater benefit to the community as a whole. People living more the 45 minutes or 70 km from a performing arts venue also concurred. Men attributed greater benefit to the individual (34%) even as women favoured benefit for both equally (39%).

In discussions with the presenting field it became clear that this finding effectively counters beliefs that the arts primarily benefit an elite or that their value is limited to those who attend most frequently. Rather, the less likely Canadians are to attend, the more they believe that the performing arts benefit their communities rather than only individuals attending.

**Canadians believe that the performing arts benefit their communities, whether or not they attend.**

## LEVELS OF BENEFITS

### **Benefits to Individuals**

*Entertainment, fun*

*Stimulation (intellect, emotion, spirit)*

*Learn/experience something new*

*Exposure to different cultures*

*Social opportunities*

*Health and well-being*

### **Benefits to Community**

*Energy and vitality*

*Quality of life*

*Creative communities*

*Understanding between cultures*

*Pride and belonging*

*Community safety*

### **Benefits to Society**

*Volunteering*

*Civic engagement*

*Better education outcomes*

*Social cohesion*

*Economic development*

The promise of a great show is just the beginning of the performing arts experience. Canadians know the profound transformation that the performing arts offer.



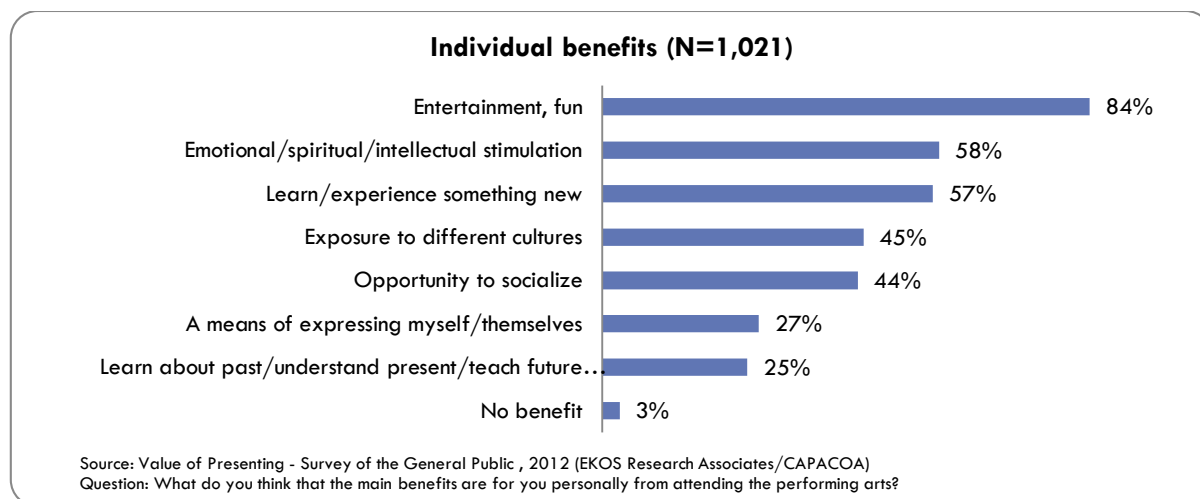
*This video illustrates the ripple effects of performing arts presentation.*

Over the years, studies have shown that attendance at professional performing arts events creates individual, community and societal benefits.

These benefits touch many aspects of life. They reverberate on emotional, intellectual, spiritual, social and cultural levels. Canadians say that the performing arts bring vitality, energy and a sense of well-being to their community. And there are considerable spill-over effects. For instance, better individual health also benefits society by reducing health care costs and avoiding productivity losses.

### **INDIVIDUAL BENEFITS**

Most people expect that attending a performance – whether theatre, music, dance or another discipline – is first and foremost a fun, entertaining experience. Many appreciate the intellectual, emotional or spiritual stimulation provided by the performing arts as well as the opportunity to experience or learn something new<sup>21</sup>.



A performance can be fun to one person and transformative to another. A storyteller might captivate people and make them feel rooted in the present moment. A musician might play a song that fits perfectly into someone's personal "life soundtrack." A play might bring a new perspective to an old dilemma. A dance workshop might lead someone to adopt a more active lifestyle.

People often attend performances with a friend or partner making it an enjoyable social occasion. 44% report purposely using performances as an opportunity to socialize.

Many stories of benefit that individual patrons experience were collected by CCI – Ontario Presenting Network's<sup>22</sup>:

*"I rarely attend dances, perhaps the occasional ballet, and do not know anything about dance. I had I absolutely no preconceived notion of what to expect. I was shaken by these dances, on a deep emotional level, and moved to tears at times. It was spellbinding, enthralling, and deeply moving emotionally. I can only thank the people involved with bringing this performance to Guelph and all the people involved with the dancing. Simply amazing ... The dances were very personal. They reflected some of my own personal experiences, people I have known, and some intimate moments with patients in my professional life as a nurse. I brought my adult daughter with me and was so pleased to have been able to share this special night with her."*

*"Just before my mother went into a home suffering from Alzheimer, I saw Tafelmusik with her. Now going to the theatre continues a connection with my mom – it's very special."*

*"The theatre has enriched our lives and we are better for being a part of it."*

A Value of Presenting workshop participant cited the effect a particular musical theatre performance had on them: "There is a sense of the reverberation of a great performance in having one's own creative spirit awakened."

These individual benefits quickly multiply in a theatre, at the ballet or at an outdoor music festival.

### QUANTIFYING PERFORMING ARTS EFFECTS ON WELL-BEING

*The Arts and Individual Well-Being in Canada*<sup>23</sup>, shows strong correlations between attending the performing arts and health and well-being. The analysis explores whether participation in 18 arts and culture activities has an association with eight social indicators above and beyond demographic factors. That means the models control for the demographic profile of healthy, socially-active citizens, in order to learn to what degree their cultural participation explains aspects of health and well-being.

*There is a strong connection between six performing arts categories and eight indicators of health, well-being and civic engagement.*

After controlling for these other factors, there are several statistically significant correlations:

- **Theatre attendance** is strongly associated with better health, better mental health and volunteering. It is also associated with having done a favour for a neighbour in the past month, very strong satisfaction with life and feeling less trapped in a daily routine.
  - Specifically, theatre goers are remarkably 2.29 times more likely than non-attenders to have volunteered in the past year. They are 32% more likely to report very good or excellent health and 30% more likely to report very strong satisfaction with life.
- **Classical music attendance** is very strongly associated with higher volunteer rates and very strong satisfaction with life. It is also associated with better mental health, having done a favour for a neighbour in the past month and feeling less trapped in a daily routine.
  - Classical music attendees are 86% more likely to have volunteered in the past year than non-attenders. They are 29% more likely to report very strong satisfaction with life.
- **Popular music attendance** is strongly associated with better health and volunteering. It is also associated with better mental health, having done a favour for a neighbour in the past month and feeling less trapped in a daily routine and very strong satisfaction with life.
  - Pop music attendees are 64% more likely than non-attenders to have volunteered in the past year and they are 23% more likely to report very good or excellent health.
- **Attendance at cultural festivals** is strongly associated with volunteering, better health. It is also associated with having done a favour for a neighbour in the past month, better mental health, and feeling less trapped in a daily routine and strong satisfaction with life.
  - Festival goers are twice as likely as non-attenders to have volunteered in the past year and 25% more likely to report very strong satisfaction with life.<sup>24</sup>

These findings contribute important data affirming that individual motivations for attendance produce important benefits that translate to the community and societal level.



## COMMUNITY BENEFITS

According to Canadian Heritage<sup>25</sup>, 92% of Canadians believe that arts and culture make a community a better place to live. Furthermore, the *Survey of the General Public* revealed that performing arts facilities specifically, are seen by nearly 90% of Canadians as important to a 'good quality of life', 'a strong sense of pride in the community', and 'economic development.' Most also believe that facilities create 'better understanding between cultures' and that they contribute to community safety due to increased activity at night.

This table shows the rankings of several benefits that presenters and Canadians were asked about in the two surveys undertaken as part of the *Value of Presenting* study. These two lists share several items verbatim, while in several instances more detailed statements were used with Canadians<sup>26</sup>. The colour coding is used to show the three tiers of response categories. (Note: The specific percentages are not comparable between these two data sets, because we offered a different number of options from which to choose.)

What do you think that the main benefits of having performing arts presentation in the community are?(Up to 3)		As a performing arts presenter, what do you consider the top 3 benefits of your organization to your community? (Up to 3)	
(N = 1,031)	Canadians	(N=288)	Presenters
Brings energy and vitality to community	42%	Stronger sense of community identity or community belonging	76%
Improved quality of life and well-being of residents	38%		
More creative community	37%	More creative community	52%
Stronger sense of pride in community (22%) & Stronger sense of identity to community (15%)	33%	Improved health and well-being of individuals and families	30%
Greater economic development in community	32%	Better understanding between cultures	29%
Better understanding between cultures	19%	Increased cross-sectoral collaboration (e.g., business, culture, social services)	27%
Increased partnerships between different organizations in the community	12%	Greater economic development	26%
Better ability to attract and keep skilled workers in the community	10%	Higher civic engagement	22%
Raising public issues and generating public discussion in the community	8%	Better capacity to attract and retain skilled workers	9%
Greater safety through increased activity at night	4%		

While these three tiers feature similar ideas showing a great deal of congruence of views, there are important differences in the language Canadians and presenters use.

For Canadians, the highest-rated benefits of the performing arts in their communities are energy and vitality along with improved quality of life, and a more creative community.



Canadian Heritage found that 92% of Canadians agree that “arts are an important way of helping people think and work creatively.”<sup>27</sup> These connections between vitality, creativity and workplace culture have garnered scientists’ attention. For instance, a pilot study<sup>28</sup> on providing cultural activities to improve the work place environment found evidence of participants’ increased vitality and the potential for a better work place culture as a result of attending performing arts events. Another study<sup>29</sup> on cultural participation and health among medical staff found that fine arts including attending concerts and signing in a choir improved perceived physical health, social functioning and vitality.

Presenters selected stronger sense of community identity and belonging as their top choice. While all of these ideas apply, it is important to realize that the language of identity does not appear to resonate as strongly – or immediately – with Canadians. In discussion with presenters, it was felt that Canadians respond more positively to the more immediate, more tangible language of energy, vitality and pride. These elements in turn are assumed to contribute to strengthening community identity, which is a longer term proposition.

***92% of Canadians say that arts and culture make a community a better place to live.***

Further, these results suggest that an individual’s exposure to different cultures eventually leads to better understanding between cultures. Pride in one’s community and a sense of belonging may be fostered through these shared experiences, and a stronger community identity may emerge.

Finally, Canadians feel that their quality of life and sense of well-being are strengthened by having performing arts facilities and presentations in their community, whether or not they attend a particular event.

Together these experiences contribute to greater civic engagement, social cohesion, increased creativity and economic development.

## **BENEFITS TO SOCIETY**

### **HEALTH**

Knowledge about the effects of the arts on health is extensive. In addition to evidence about the benefits of participating, there is new evidence of links between attendance and several health indicators such as self-reported health, stress, mental health, vitality and longevity.

In addition to the Canadian studies cited, several international studies have shown correlations between attendance and specific health benefits. In each of these studies researchers controlled for demographic factors.

A study undertaken in the United States found that the more frequently people attend performing arts and other receptive arts, the more likely they are to report good health.<sup>30</sup>

A Norwegian study<sup>31</sup> published in 2011 found that people who attend concerts, theatre or film are significantly healthier, have lower anxiety and are less susceptible to depression.

A long-term study in Sweden that followed more than 12,600 people in a 9-year interval found that people who rarely attended theatre, concerts and live music performances, museums, arts exhibition and cinema ran a nearly 60% higher mortality risk than those attending most often.<sup>32</sup> In short, attending performing arts and other cultural events may be linked with longevity. Another recent Swedish study from 2009 on cancer mortality revealed that infrequent and moderate attendees of theatre, live music shows and other cultural events in urban areas are three times more likely to die of cancer over time than frequent attendees.<sup>33</sup>



*This video by the Société pour les arts en milieux de santé (Health Arts Society) highlights the effects of professional performances in long-term care.*

Pioneering research<sup>34</sup> on aging and the role of participatory arts showed that the brain would continue creating new cells at any age so long as it was engaged in new and challenging intellectual activities. In this study, the positive impact of participatory art programs (in this case: chorale vs. typical activities) for older adults on overall health, doctor visits, medication use, falls, loneliness, morale, and activities reflects important health promotion and prevention effects and a reduction of risk factors that drive the need for long-term care.

In Canada this evidence is increasingly translated into new types of presenting work and community partnerships. For instance, the Vancouver-based Health Arts Society presents performances by professional musicians to people living in residential and long-term care, a notoriously underserved audience group.

The profound health effects are mirrored in comments about the program:

*“All of the performers were of a calibre which we are not typically able to provide for our residents. The performances were exciting, moving, educational and fun. There was literally something for everyone. The residents would talk about the performers for weeks after each visit; reminiscing about how beautifully Joel sang or how Amicus Duo composed a song for us on the spot! It was very interesting for me to see the effect of the music on some of our residents. I saw residents there who would normally never attend a music program, clapping and cheering. One gentleman, a former resident of the downtown east side, is a very tough character. He rarely attends any social gathering, and if he does, only stays for a few minutes. He wandered into the Trio Accord performance, stayed for the entire show, and was moved to tears by the end. I suspect it was his first experience of live, classical musical, beautifully performed.”*

*“What I have really observed is the calm atmosphere after performances. Sometimes at this time of the day, it can be a little unsettling for our residents with dementia.”*

Another story comes from a comment in the *Survey of Performing Arts Presenters* where a festival describes working in partnership with a long-term health care facility. They present a free concert each year with provincial and national performers and they have held visual art workshops as well:

*“We have many partnerships, but this one is the most impacting on the residents and on the artists themselves. We bring the magic of the arts to them and they bring a humbling sense of reality to us and their responses are always real and honest. It has had a lasting health building impact on the residents there for weeks after the festival. It brings a new energy to the space and to the staff – all are affected.”*

## LEARNING

Presenters who invest in arts education are championing the arts not for their own sake but for their proven capacity to improve people’s lives and create potentially life-long passions and skills. Canadians agree with this motivation when they identify emotional, spiritual, intellectual stimulation and learning something new as key benefits of attending performances.

Presenters’ partnerships involving education are multi-faceted and creative. For instance, Alianait Arts Festival prides itself on presenting great art while helping build a healthier Nunavut. This organization shared this experience in the *Survey of Performing Arts Presenters*:

*“Alianait has partnered with local Iqaluit schools and the Iqaluit District Education Authority. We present events in school facilities on a regular basis and set up our Festival tent on school grounds. We offer free concerts and workshops to the schools - this is part of the contract for artists coming to Iqaluit. As a result, we have developed a very positive working relationship and no longer pay any fees for using the school facilities. We also provide opportunities for school groups to perform at Alianait events and many of the teachers and students have become Alianait volunteers. We are also building our future audience.”*

Several organizations specialize in bringing professional performing arts to schools:

- Réseau Ontario and RADARTS coordinate artist booking activities in large networks of school boards and school districts in Ontario and the Atlantic provinces.
- ArtStarts in Schools provides performing arts programs, workshops and teacher resources to schools across British Columbia since 1996. It is active in 200 communities across in BC.
- MASC: Connecting Artists and Learning, founded in 1989, serves schools in Eastern Ontario and Western Quebec and reaches over 100,000 students annually with professional performing and visual arts.

- Prologue to the Performing Arts, founded in 1966, is the oldest organization of its type in Canada. It brings professional performing arts to Ontario schools and reaches about one million students each year.

Teachers attest to the positive effects of bringing professional live performance into schools<sup>35</sup>:

*"Each artistic experience that we are able to offer our students adds value to their program, their learning, and their sense of self and others."* Riverview Alternative School, Ottawa, ON



*ArtStarts in School showcases its work in this video.*

*"The focus on teamwork highlighted for students the importance of community and listening to one another."* St. Catherine Catholic School, Metcalfe, ON

Another example of the powerful intersection of performance and learning comes from Concrete Theatre in Edmonton, Alberta which creates participatory theatre by professional actors presented in schools. One of their longest running works is *Are We There Yet*, by Jane Heather. *"Drawing a parallel between mastering driving skills and negotiating relationship dilemmas, this award-winning play humorously opens a dialogue on sexuality. The laughter releases the tension, helps young people feel safe, and allows them to talk about the situations on stage and by proxy, in their lives. The participatory nature of the play encourages the audience to increase their knowledge and practice problem-solving skills as they explore dilemmas that are relevant to them."*

## **SOCIAL COHESION**

According to Canadian Heritage, almost all Canadians (92%) agree that arts experiences are a valuable way of bringing together people from different languages and cultural traditions. In the *Survey of the General Public*, 78% of Canadians said that having performing arts facilities in their communities is moderately or very important to creating better understanding between cultures. Forty-five per cent (45%) cite exposure to different cultures as a key benefit of attendance at performing arts events.

The arts make social bonds stronger. Canadian Heritage found that the vast majority of Canadians agreed that the arts and culture help them express and define what it means to be Canadian (87%) and that they help them feel part of the local community. Festivals can be one of the most obvious ways to see these effects at work. An example is the multi-disciplinary Scene festival presented by the National Arts Centre every two years. These festivals are designed to make better known the unique regions of the country and bring national attention to emerging and established artists.

In order to realize these benefits requires a gathering space and a convener, often in the form of a presenter. But by no means are presenters the only avenue toward realizing significant benefits. CCI – Ontario Presenting Network's *Values and Benefits Report* stated: "Arts organizations help build a sense of community, through being community gathering places, through a shared experience or as a way to identify the community. Producing organizations have a more intimate relationship with their audience than was found when studying presenting organizations. It was clear that the audience members felt a very strong connection to the performing artists and enjoyed having them as visible members of their community."<sup>36</sup>

At *Value of Presenting* workshops, many presenters asserted that they take a leadership role in bringing together different types of partners within their communities both for the benefit of the arts and artists and for the benefit of the community.

The *Survey of Performing Arts Presenters* collected stories about numerous community partnerships:

*"To create the Year of the Rabbit Chinatown Art Parade, we collaborated with the Chinese Cultural Centre, downtown towers and management, City of Calgary Parks and Recreation, media, and a host of artistic and cultural organizations and individuals."*

A presenter shared this experience of getting to know each other:

*"We recently presented an Afghan artist and worked with the local Ismaili community around some of our outreach activities. They hosted a luncheon for their community and key members of the local arts and education community at which this artist performed briefly and our organization had a presence. They in turn helped market our concert and outreach events to their community, purchased tickets to our concert and attended our other outreach activities. It was not a financial partnership, but both groups were invested in working together, embraced the partnership, and lived up to their commitments, creating a win-win situation for everyone."*

## ECONOMIC CONTRIBUTION

Performing arts provide direct and indirect employment, promote spending in the local economy, attract tourists to major events and festivals and are an important cultural export.

Consumer Spending on Cultural Goods and Services, 2008		
	Spending (in billions)	Ratio
Home entertainment equipment, rentals and services	\$15.5	57%
Reading material	\$4.8	18%
Photographic equipment and services	\$1.7	6%
<b>Live performing arts</b>	<b>\$1.4</b>	<b>5%</b>
Movie theatre admission	\$1.2	4%
Works of art, carvings, decorative ware, antiques	\$1.1	4%
Art supplies and musical instruments	\$1.1	4%
Admission to museums and heritage-related activities	\$0.5	2%
Total	\$27.4	
Source: <i>Consumer Spending on Culture in Canada, the Provinces and 12 Metropolitan Areas in 2008</i> , Hill Strategies (2010)		

Hill Strategies<sup>37</sup> reports that Canadians' spending on live performing arts (\$1.4 billion) was more than double their spending on live sports events (\$650 million). Between 1997 and 2008, spending on live performing arts grew by 28% (adjusted for inflation). That is significantly more than the 14% growth in the

Canadian population during the same period. Canadians spent \$27.4 billion on cultural goods and services in 2008, which represents 2.9% of total consumer spending.

Additional economic effects directly related to performing arts include hospitality, retail and transportation. For instance, the Ontario Arts Council found that Ontario arts and culture tourists spend twice as much per trip as does a typical tourist. It also found that a high proportion of Ontario's foreign tourists engage in arts and cultural activities. American arts and culture tourists represent 39% of all American overnight visitors to Ontario in 2010. 63% of overseas visitors engaged in an arts or culture activity.<sup>38</sup>

There are thousands of organizations and individuals who present live performing arts events. In 2010, the Cultural Human Resources Council reported nearly 6,000 performing arts establishments with a workforce of over 38,000<sup>39</sup>.

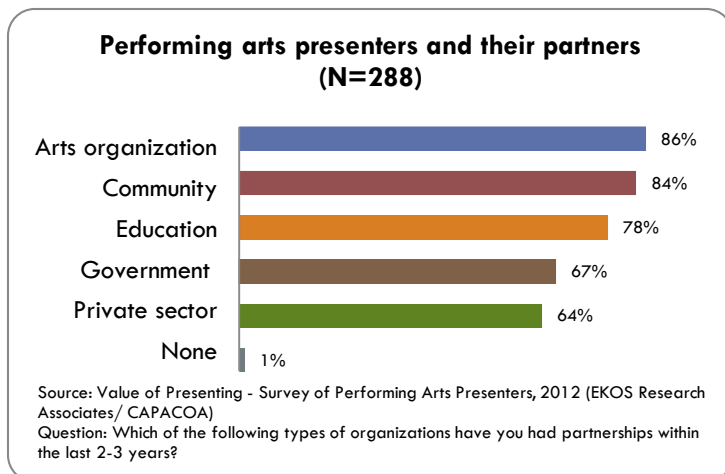
**Canadians' spending on live performing arts (\$1.4 billion) was more than double their spending on live professional sports events.**

Given these facts, it is not surprising that 88% of Canadians said that performing arts facilities are moderately to very important to their community's economic development in 2012.



## PARTNERSHIPS CONTRIBUTE TO CREATIVE COMMUNITIES

The *Survey of Performing Arts Presenters* contributes significant new information on the degree to which presenters work in partnerships.



It is very rare that arts presenters have not had any partnerships in the past three years. The *Value of Presenting Study* revealed that 86% of presenters partnered with arts organizations, and almost as many partnered with community-based organizations. 78% worked in partnership with educational institutions and 67% with government. Many government and community-based

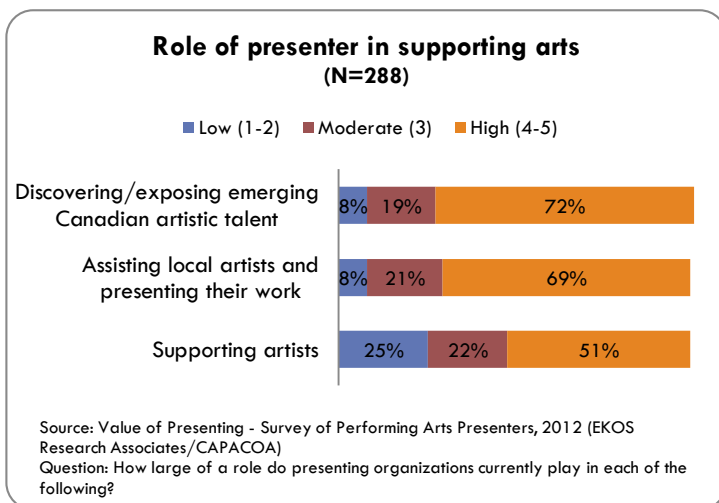
partnerships are with organizations outside of the arts sector in areas such as social services (37%), cultural diversity/immigration (33%) and health (29%).

Presenters active in different areas have somewhat different partnership focus:

- Minority francophone presenters outside of Quebec are much more likely to form a partnership with a school or educational institution. As a corollary of that, they tend to be more oriented toward audience development as a key objective of their non-arts based partnership.
- Rural presenters have a higher number of community-based partnerships and a lower number of partnerships with arts organizations reflecting the lack of availability.
- Presenters serving aboriginal audiences are more likely to work in partnerships with government organizations and private sector and they have stronger ties with non-arts based organizations than the average.

## PARTNERING WITHIN THE ARTS ECOSYSTEM

As expected, most organizations responding to the *Value of Presenting Survey of Performing Arts Presenters* (87%) devote a considerable effort to artistic activities generally – including vision development; planning for a series or festival; and selecting artists and productions. More than half (56%) would say that a high degree of effort is spent on new artistic development, such as residencies, artistic collaborations or exposing new artistic talent.



Supporting these findings, more than seven in ten arts presenting organizations (72%) 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%) feel that presenters have an important role in assisting local artists. 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%) feel this is true, 22% believe that presenters play a moderate role even as 25% disagree.

A presenter shared this perspective on strengthening their role in supporting artists and their careers: *"We should foster more strategic planning where the presenters are involved in mapping out a plan to be a part of the trajectory of the artists."*

A similar tenor came through in roundtable discussions with agents and managers, as well as in interviews with representatives of Music PEI and Music Yukon. These groups see themselves as brokering relationships with all parts of the arts ecosystem and as assisting both presenters and artists in building audiences. In their view, presenters are an important bridge between artists and audiences. As a result, they appreciate presenters who work collaboratively with agents and artists toward common goals. They see a presenter's capability and capacity to take artistic risks critical to fostering an enriched community and, at the same time, furthering artists' careers.



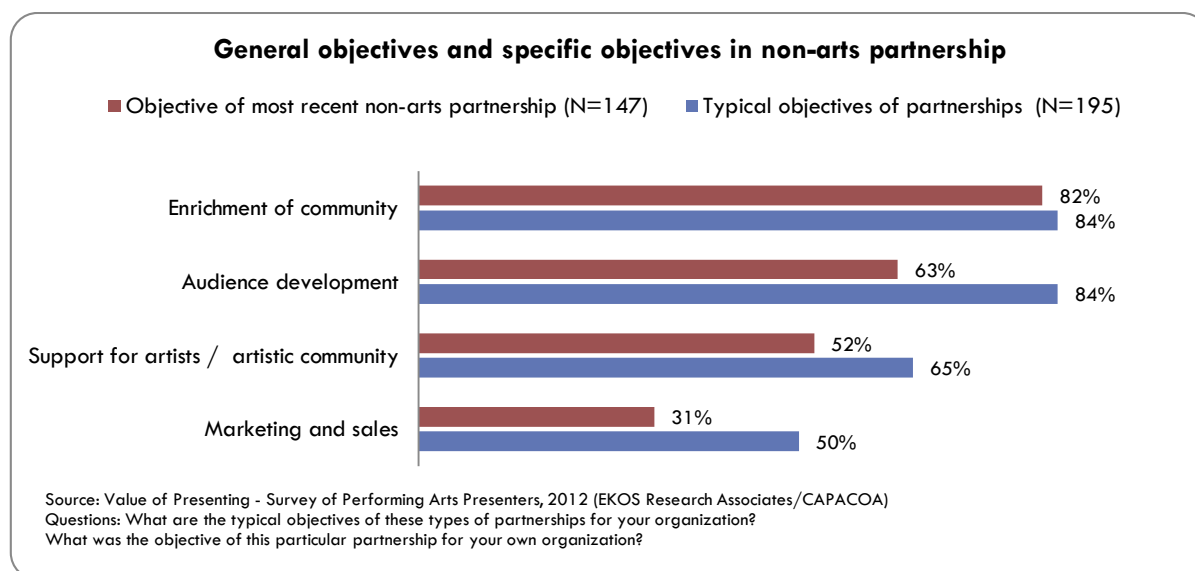
The Last 15 Seconds, MT Space.

Photo: Andy Wright - Point and Shoot Imagery

## PLAYING A LEADING ROLE IN COMMUNITY BUILDING

Most often (65%) arts presenters take a leading role in partnerships. One-quarter (26%) indicated that they and their partner(s) assumed equal roles.

When asked what the 'typical objectives' of partnerships are, 84% said audience development and 84% said enrichment of the community. However, when asked about their most recent partnership with community partners, the results changed. While enrichment of the community stayed at the top, all of the other categories declined significantly. This finding suggests that presenters place community benefit above their more narrow self-interests. It points to the community-mindedness and community service orientation of many presenters.



*“The most rewarding partnerships have been with the First Nations community. It involved the steepest learning curve, letting go of a specific outcome and hearing what was important to their community. The outcome has always been unexpected and generally more rewarding than anticipated.”* Harrison Festival of the Arts, Harrison Hot Springs, B.C.

## CHARTING A WAY FORWARD

*The Value of Presenting: A Study of Performing Arts Presentation in Canada* has yielded new information that allows presenters to ask better questions.

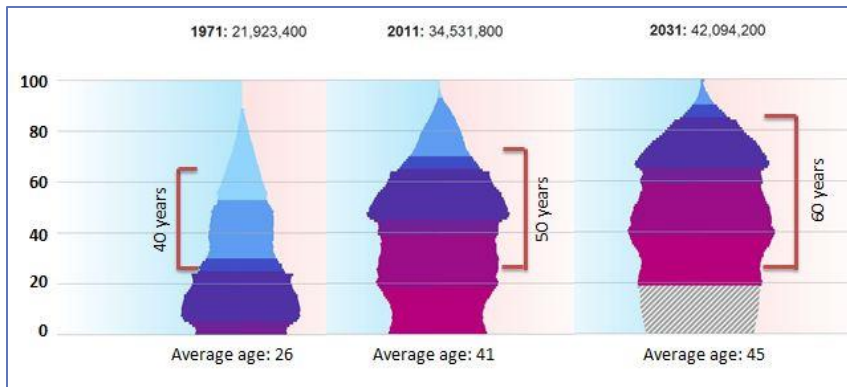
In this section we point to three areas in which presenters need to adapt to major external changes, decide how to position themselves within their communities and how the presenting field as a whole can act to build a secure foundation in a dynamic world.

### DEMOGRAPHIC CHANGE TO 2031

Demographic changes in Canada – an aging population, a young aboriginal population and immigration patterns that have shifted from predominantly European to predominantly Asian immigrants – challenge presenters as they work to balance their priorities.

#### AGE

Canada's population is both aging and growing. 40 years ago, the average age of Canadians was about 26. At that time, the baby boom generation made up about 40% of the population. Seniors over 65 on the other hand, made up only 8% of the population. By 2011 this picture had changed considerably: The ratio of seniors nearly doubled to 15% and the average age rose to close to 41 years old.



Statistics Canada's projection to 2031 shows that unprecedented numbers of people will reach ever older ages and the total population will continue to grow; the population will have

nearly doubled over 60 years. The ratio of seniors over 65 is projected to triple to 23%. However, this represents a more than five-fold increase from 1.7 million to 9.7 million seniors.

With this tremendously increased life expectancy, performing arts presenters have the opportunity to expand their adult market from a 40-year horizon in 1971 to a 60-year horizon by 2031. That means the sector may enjoy even longer term relationships with audiences. And it challenges presenters to learn how to address effectively the more diverse and larger number of generations within their audience. How might programming, marketing, customer experience and outreach change to adapt to this emerging reality?

Much of the challenge lies in understanding local demographics and how to respond to a changing community through programming and marketing.

Rather than “how can I get young people off the couch and out of the house, or away from their smartphone long enough to come to a show?”, the attendance data suggests better questions, for instance: “how can I appeal to this highly engaged young audience that participates in a variety of performing arts experiences, but outside my venue?”

Furthermore, while many people will live healthily well beyond 80 years of age, it should be expected that many will increasingly deal with age-related changes in abilities. That means now is the time to consider what access to performing arts facilities will mean when such a large part of the audience is aging.

## **ABORIGINAL POPULATION**

Aboriginal peoples in Canada made up about 4% (1.2 million) of the total population in 2006. Importantly, this population is the fastest growing and youngest group in Canada with an average age of 26. In this way today's Aboriginal population looks like Canada at large in 1971.

Their distribution across Canada is not equal. The largest numbers of Aboriginal peoples live in Ontario. They make up only about 2% of the population in the province, which is one of the smallest ratios. As a proportion of total population the three territories have the highest ratio of Aboriginal peoples ranging from 25% to 85%. The two prairie provinces, Manitoba and Saskatchewan, have about 15% of their populations who are Aboriginal. Central and Eastern Canada has the lowest ratios with 1 to 2 %, except for Newfoundland with close to 5%.

There are presenters in communities across Canada that already work in partnership with Aboriginal artists and audiences. Further, Canada Council for the Arts, for instance, has supported Aboriginal musicians through showcases and exposure nationally and internationally. Despite this work, more can be done. Considering the fractured relationship between Aboriginal peoples and Canada, it stands to reason that the performing arts could make a meaningful contribution to reconciliation, healing and moving forward by continuing to build mutually beneficial and respectful relationships. Depending on the specific community they work in, presenters may have profound opportunities to forge such relationships.

## **IMMIGRATION**

Canada's immigration level has increased steadily since the early 1960s and since 1996 the ratio of the foreign-born population in Canada has begun to grow as well. By 2006, 1 in 5 was born outside Canada, the highest ratio since the early 1900s. Indeed, immigration is

expected to further increase in importance as a major driver of population growth over the next 20 years.

The face of immigration has also been changing quickly. Until the 1970s most immigrants came from Europe, but since the 1980s, new immigrants have been coming predominantly from Asia. Together, Africa and Central and South America also now exceed European immigration.

Importantly, recent immigrants are highly skilled and typically better educated than their Canadian-born peers. Despite this, their income on average lags behind their Canadian-born peers. However, the children of immigrants are the most successful, outperforming immigrants and Canadian-born equivalents, in both education and earning power.

While multi-culturalism remains a pillar of Canadian society and programs to showcase culturally diverse musicians, for instance, have been undertaken, gaps continue to exist.

This shift in immigration patterns poses new challenges. For instance, regardless of this diversification, the supply of Canadian performing arts remains largely based on European traditions. In order to appeal to recent immigrants and their children, what changes might be needed to programming and formats and what changes might be needed to marketing and outreach activities to effectively engage new immigrants in the performing arts?

The performing arts have the proven capacity to engender a wide range of benefits for the community at large. How can this knowledge be used to create understanding between people from different backgrounds in order to foster socially cohesive, diverse communities?

## TECHNOLOGY ADVANCES

The rise of digital technologies, the Internet and mobile communications have been felt deeply in the music industry since the 2000s. How technologies will ultimately impact other performing arts like opera, dance or theatre is not as clear.

Generally, presenters have widely accepted advanced technologies on stage. Artists and producers have been experimenting with new technologies as a way to deliver live performance experiences, such as the New York-based Metropolitan Opera.

In particular with the emergence of the 4G-LTE<sup>40</sup> internet standard, capacities are increasing to the point where mobile live streaming should be expected to become ubiquitous. This presents a tremendous change from pre-internet times, but also from the current social media platforms that tend to focus on image uploads and link sharing. The behaviour shift toward live streaming video is already apparent. Bell Labs has estimated that by 2020 people in USA will consume 7 hours of video per day, up from 4.8 hours.



Already YouTube reported in 2012 that its 800 million users<sup>41</sup>:

- Uploaded 72 hours of video to YouTube every minute.
- Watched 4 billion hours each month.
- Use of mobile devices for upload and viewing is rising rapidly.

A key question given these rapid and dramatic changes in technological capabilities is how presenters can learn from the structural disruption that has taken place in the music industry and maintain a strong, essential role in Canadian society that is financially viable.

### LEARNING FROM THE MUSIC INDUSTRY

Despite the massive shifts in the music industry, arguably music is alive and well. Fans have unprecedented access to music and musicians; musicians have unprecedented access to fans. Social media like YouTube, Vimeo, MySpace, Twitter and Facebook enable musician-fan interaction without any traditional intermediaries. Fans are even participating in crowd-funding musicians' recordings, by paying up-front for new productions.

In short, the power in the industry has moved toward online distributors and toward musicians themselves. The opportunities presented by emerging technologies were typically seized by individuals and organization outside the traditional music industry.

The democratization of the means of production and distribution has created irreversible structural changes in the music industry. In general terms, these changes have challenged the industry to redesign revenue streams in order to sustain the music industry.

Digital channels also have up-ended the traditional book publishing model, the newspaper industry, the encyclopedia business, mail delivery services, travel agencies and the research industry among others.

Considering mobile streaming using personal devices with the capability to render live 3D images real-time, what might this mean to performing arts like theatre and dance that up until now had not been easily digitized and webcast?

How can the performing arts sector as a whole proactively stake its claim in this emerging digital streaming world and build new business models to support digital distribution of a full range of performing arts for the benefits of the performing arts ecosystem? What might these new business models look like?

In light of the increasing number of older Canadians, how might digital technologies enable maintaining a strong engagement with live performance for seniors regardless of their ability to attend events? Similarly, how might other groups less likely to attend benefit?

## AN ADAPTABLE SECTOR IN A DYNAMIC WORLD

Since the 1970s, the performing arts sector has moved from being mostly concerned with artistic matters to focusing on public access, and more recently, to discussions on public engagement and community value of the arts. With these shifts in philosophy or priority, how to sustain presenting organizations in the long-term is of paramount concern to presenters.

In this vein, municipalities across Canada have been adopting a broader, 'public good' understanding of culture since the late 1990s. People who work in cultural planning often have a mandate related to generating economic impact, community/downtown revitalization, community safety or quality of life for residents. As such, they are asked to consider arts and culture as vehicles for fostering community pride and social development, rather than a value for their own sake.

The organizational structures of many arts organizations, in particular non-profit corporations, are designed to access government funding for certain activities and, in the case of charities, provide tax-exempt donations. However, public funding is often contingent on not building up large profits, since these activities may be considered commercial. These demands can have an undue limiting effect on performing arts presenters' financial sustainability, risk-taking, innovative programming or partnership building.

These fundamental shifts mean that performing arts presenters operate in a fluid environment where the demands of supporting Canadian artists, meeting the changing tastes of diverse audiences and purposefully realizing the profound civic benefits that flow from the performing arts converge to put pressure on the presenting model.

What viable, sustainable financial models for the presenting sector could ensure Canadians have ready access to the highest quality artistic experiences? How can presenters continue to connect artists, audiences and communities for the benefit of all?

How can public funding best support an innovative performing arts sector that continues to benefit individuals, communities and society at large? How can it help or hinder realizing artistic visions, supporting artists and building vibrant communities.

What kinds of partnerships will enhance presenters' ability to provide important services in their community?

Presenters are poised to solidify their position as community builders: These findings confirm the great value presenting holds both to enhance individual well-being and community vitality. With this study, presenters can share a powerful story of the far-reaching benefits of live performing arts presentation with audiences, funders and stakeholders throughout communities in Canada.

## LIST OF VIDEOS

The Performing Arts Ecosystem	<a href="https://vimeo.com/capacoa/perfartsecosystem">vimeo.com/capacoa/perfartsecosystem</a>
The Ripple Effect of the Performing Arts	<a href="https://vimeo.com/capacoa/rippleeffectperfarts">vimeo.com/capacoa/rippleeffectperfarts</a>
Performing Arts and Health	<a href="https://vimeo.com/capacoa/perfartshealth">vimeo.com/capacoa/perfartshealth</a>
Performing Arts and Learning	<a href="https://vimeo.com/capacoa/perfartslearning">vimeo.com/capacoa/perfartslearning</a>
Knowing Each Other	<a href="https://vimeo.com/capacoa/knowingeachother">vimeo.com/capacoa/knowingeachother</a>
Performing Arts Presenters in Canada	<a href="https://vimeo.com/capacoa/perfartspresenterscanada">vimeo.com/capacoa/perfartspresenterscanada</a>
Early Performing Arts Events and Institutions in Canada	<a href="https://vimeo.com/capacoa/earlyperformingarts">vimeo.com/capacoa/earlyperformingarts</a>
Aboriginal Voices in the Performing Arts	<a href="https://vimeo.com/capacoa/aboriginalperfarts">vimeo.com/capacoa/aboriginalperfarts</a>
Changing Demographics and the Performing Arts	<a href="https://vimeo.com/capacoa/changingdemographics">vimeo.com/capacoa/changingdemographics</a>
Performing Arts Attendance in Rural and Urban Setting	<a href="https://vimeo.com/capacoa/urbanruralattendance">vimeo.com/capacoa/urbanruralattendance</a>

These videos were created by CAPACOA in partnership with Canadian Geographic's Canadian Atlas Online. ([www.canadiangeographic.ca/atlas](http://www.canadiangeographic.ca/atlas))

Direction and Scripting: Strategic Moves.

Design, Development and Project Management: Banfield-Seguin Ltd.

## ANNOTATIONS

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<sup>1</sup> The *Survey of Performing Arts Presenters* was conducted in English and French by EKOS Research Associates. The survey was a self-administered form completed over the Internet by key, senior contacts in responding performing arts presenting organizations. A regionally, culturally and programmatically diverse list of total of 288 presenting organizations elected to participate in the survey. As no known sample frame existed of performing arts presenting organizations, a comprehensive sample frame was created based on lists from 23 different sources including presenting networks, CAPACOA and Canada Council for the Arts. A list of 215 Quebec presenters was assembled from public sources and other lists supplied because RIDEAU did not provide its presenter directory. There were 1,418 unique organizations once duplicates were removed. 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 via an open link. Qualified presenters that heard about the survey through ongoing consultation including the RIDEAU Annual General Meeting 2011, 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: 1) Apply a responsible curatorial point of view to the selection of artists you present; 2) 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, 3) Present the work of some range of artists, rather than exclusively self-present your own works. Data collection occurred over October and November 2011 with an initial e-mail invitation and multiple reminders to non-respondents. A round of telephone calls was used to boost response rates in the final two weeks of the field work. 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. 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. The survey therefore reports on these respondents' answers. Complete information on methodology and the comprehensive report is available at <http://www.valueofpresenting.ca>.

<sup>2</sup> The *Survey of the General Public* of 1,031 Canadian adults, conducted in English and French, was designed as a hybrid online-telephone survey. The sample was drawn randomly from Probit, EKOS Research Associates' online-hybrid panel of the general public. This panel includes pre-recruited members of the general public who were originally randomly selected, using a random digit dial (RDD) sample. As such this panel is considered to be representative of the general public and therefore supports the application of margin of error calculations and statistical testing. Most survey respondents (85%) completed the self-administered survey online. The remaining 15% completed the survey by telephone. The overall margin of error was 3.1% and between 6% and 8% for most sub-group segments. Survey questions were designed based on other surveys conducted in the past few years in order to permit comparisons to previous findings. The cooperation rate for this survey was 16%. The survey data were collected in the last two weeks of February 2012. Complete information on methodology and the comprehensive report is available at <http://www.valueofpresenting.ca>.

<sup>3</sup> For more detailed information, read the *Overview of the History of Presenting in Canada*, published April 2012 as part of the Value of Presenting study, at <http://www.valueofpresenting.ca>.

- <sup>4</sup> Cultural Human Resources Council, *Competency Profile – Presenters*, Ottawa: CHRC (2007). [http://www.culturalhrc.ca/minisites/Live\\_performing\\_arts/e/01-05-01.asp](http://www.culturalhrc.ca/minisites/Live_performing_arts/e/01-05-01.asp)
- <sup>5</sup> For a synopsis on francophone networks, read *Les réseaux de diffusion des arts et de la culture* [http://passeurculturel.ca/index.cfm?Voir=sections&Id=12054&M=2342&Repertoire\\_No=2137988614](http://passeurculturel.ca/index.cfm?Voir=sections&Id=12054&M=2342&Repertoire_No=2137988614)
- <sup>6</sup> In recent years, the concept of consumers' co-creating content has gained traction in many sectors. This trend has depended largely on communications technologies to enable the creation of user-generated content (UGC) for websites and advertisements. Social media networks are a more recent expression of co-creation where corporations provide platforms that are used by individuals to post a variety of digital media. In the performing arts, for instance, dance companies have experimented with encouraging creative engagement of audiences through location-specific dances.
- <sup>7</sup> For detailed descriptions, see Cultural Human Resources Council's *Competency Profile – Presenters* (2007) and *Profession: Diffuseur de spectacles* by RIDEAU available at <http://www.rideau-inc.qc.ca/grand-dossier/Profession-diffuseur-de-spectacles>.
- <sup>8</sup> This information is derived from Canada Council for the Arts' *Presenters Handbook* available at <http://www.canadacouncil.ca/development/ontheroad/presentershandbook/presenters/>. This document offered one of the most far-reaching categorizations, which were validated through the *Survey of Performing Arts Presenters* and during consultations
- <sup>9</sup> Statistics Canada, *Canadian Social Trends*, Vol 93 (2012). Several reports drawn from the 2010 Canada Survey on Giving, Volunteering and Participating are part of this series, including *Volunteering in Canada* and *Charitable Giving by Canadians*. <http://www.statcan.gc.ca/pub/11-008-x/11-008-x2012001-eng.htm>
- <sup>10</sup> Phoenix Strategic Perspectives Inc., *Arts and Heritage in Canada: Access and Availability Survey 2012*. Ottawa: Canadian Heritage (2012). It is available online at the Library and Archives Canada website [http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsdc/por-ef/canadian\\_heritage/2012/089-11-e/index.html](http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsdc/por-ef/canadian_heritage/2012/089-11-e/index.html)
- <sup>11</sup> WolfBrown, *Ontario Arts Engagement Study*, Toronto: Ontario Arts Council (2011). Available at <http://www.arts.on.ca/page4400.aspx>
- <sup>12</sup> Hill Strategies, *Canadians' Arts, Culture and Heritage Activities in 2010*, Hamilton (2012). This report analyzes data from Statistics Canada's 2010 General Social Survey. Based on interviews with 7,502 respondents it has a margin of error of 1.1%. Overall 72.4% of Canadians reported attending a live performing arts event or cultural festival in 2010. The report points out that, while "a broader range of Canadians participated in arts, culture and heritage activities in 2010 than in prior survey years, this does not necessarily mean that arts, culture and heritage organizations are achieving record attendance levels, as the survey questions regarding frequency of participation are not specific enough to calculate overall attendance. In addition, the increase in attendance may be spread over a larger number of arts, culture and heritage organizations in 2010 than in 1992." The same is true for the Value of Presenting study's *Survey of the General Public*. Moreover, the focus of these studies is on attendance reported by Canadians, rather than their spending on live performances. In the *Survey of the General Public* 75% of respondents reported attending a live, professional performing arts event in 2011. Considering the overall margin of error of 3.1% for this study and the margin of error of 1.1% for the Statistics Canada survey, the results can be considered statistically the same. <http://hillstrategies.com/content/canadians%E2%80%99-arts-culture-and-heritage-activities-2010>
- <sup>13</sup> Of note, Quebec maintains a unique Cultural Statistics framework unmatched elsewhere in Canada. It collects mandated information from specific performing arts organizations directly, rather than rely on self-reported behaviour. Conversely, it may not capture necessarily the full

extent of Quebecers behaviour as it specifically captures attendance within Quebec. Neither the Value of Presenting study nor Statistics Canada's surveys required the activity attended to have taken place in the respondent's home province.

[http://www.stat.gouv.qc.ca/observatoire/publicat\\_obs/stat\\_princ\\_cult\\_an.htm](http://www.stat.gouv.qc.ca/observatoire/publicat_obs/stat_princ_cult_an.htm)

- <sup>14</sup> Hill Strategies, *Factors in Canadians' Arts Attendance in 2010*, Hamilton (2012). This report analyzes data from Statistics Canada's 2010 General Social Survey. This study examined five arts activities including attendance at classical music, theatre, popular music and cultural festivals using a statistical model designed to isolate the effects of individual demographic factors and cultural crossovers. <http://www.hillstrategies.com/content/factors-canadians%E2%80%99-arts-attendance-2010>
- <sup>15</sup> Phoenix Strategic Perspectives Inc., *Arts and Heritage in Canada: Access and Availability Survey 2012*, Ottawa: Canadian Heritage (2012).
- <sup>16</sup> In 1992 and 1998, dance was a stand-alone category in Statistics Canada's General Social Survey resulting in important attendance data. In 2005 and 2010 dance was included in other categories that featured a variety of other performing arts which, therefore, precluded obtaining any dance-specific information. The Value of Presenting study's Survey of the General Public listed dance as a separate, unique category in order to provide current information about attendance at professional dance performances across Canada. While the 2010 General Social Survey for the first time dropped a reference to professional artists, the Value of Presenting study included this reference in its question phrasing, in order to allow for better comparisons across the time-series. In every other way, question phrasing was equivalent. This should be seen as a best attempt to replicate comparable data. However, each survey has its own methodology including the differing data collection modes used and the sequence of other questions asked.
- <sup>17</sup> Even though the Value of Presenting study's Survey of the General Public in 2012 returned the same patterns, we are using the 2010 General Social Survey data, because its larger sample size enables more detailed subgroup analysis at lower sampling margin of errors across all seven age groups.
- <sup>18</sup> Culture et Communications Québec, *Enquête sur les pratiques culturelles au Québec*, Survol No 23 (août 2012). The analysis is based on surveys of Quebecers undertaken every 5 years since 1979. The report includes a series of charts that show attendance for the baby boomer generation as well as the 25-34 and 55-64 age groups across a 40 year-span. The report is available in French only. [http://www.mcc.gouv.qc.ca/fileadmin/documents/publications/Survol23\\_08-2012rev.pdf](http://www.mcc.gouv.qc.ca/fileadmin/documents/publications/Survol23_08-2012rev.pdf)
- <sup>19</sup> WolfBrown, *Ontario Arts Engagement Study*, Toronto: Ontario Arts Council (2011). The analysis suggests that the large differences they observed between actual frequency of attendance and salience of attending professional performing arts may indicate a level of unfulfilled demand for live performing arts, with more potential for programs and promotion. Available at <http://www.arts.on.ca/page4400.aspx>.
- <sup>20</sup> Canada Council for the Arts, *Public Engagement in the Arts*, Ottawa: 2012. <http://www.canadacouncil.ca/aboutus/StratPlan2011-16/default.htm>
- <sup>21</sup> Further reading: WolfBrown, *Assessing the Intrinsic Impacts of the Performing Arts*. Commissioned by 14 Major University Presenters (2007). This study was a first attempt to define and measure how audiences are transformed by a live performance. It is part of a series of reports known as *The Values and Impact Study*. It is available at <http://wolfbrown.com/images/books/ImpactStudyFinalVersionSummaryOnly.pdf>. A French-language summary has been prepared by Hill Strategies and is available at <http://www.hillstrategies.com/fr/content/assessing-intrinsic-impacts-live-performance>.



- <sup>22</sup> Cheryl Ewing, *Value and Benefits Report*, Toronto: CCI – Ontario Presenting Network (2008). This study is based on in-depth interviews with performing arts attendees before and after attending live performances.
- <sup>23</sup> Hill Strategies, *The Arts and Individual Well-Being in Canada 2010*, Hamilton (2013). Hill Strategies provides this context on the results it obtained: “While the statistical models provide evidence of a connection between cultural activities and well-being, some questions about variables that might have an association with the three indicators of well-being (such as the influence of smoking or alcohol consumption on health) were not available in the *General Social Survey*. In addition, it is very difficult to provide evidence of a cause and effect relationship between the variables in a statistical model in the absence of an experiment to directly measure the impacts of culture on personal well-being.” Furthermore, the report explains that “Cultural attendees are defined as anyone who went at least once to the relevant cultural activity in 2010. This is a low threshold of cultural participation, as repeated (or deeply engaged) cultural experiences may generate stronger social connections. Also, many cultural activities do not have explicit social goals.” <http://www.hillstrategies.com/content/arts-and-individual-well-being-canada>
- <sup>24</sup> Further reading: The US-based National Endowment for the Arts has contributed to research of civic benefits like higher likeliness to volunteer, help neighbours, to take part in community activities and to vote. Information is available at <http://www.nea.gov/research/Notes/98.pdf> A French language summary by Hill Strategies is available at: <http://www.hillstrategies.com/fr/content/les-tendances-de-lengagement-civique-et-social-des-amateurs-darts-dans-leurs-collectivit%C3%A9s>
- <sup>25</sup> Phoenix Strategic Perspectives Inc., *Arts and Heritage in Canada: Access and Availability Survey 2012*, Ottawa: Canadian Heritage (2012).
- <sup>26</sup> University of Waterloo, Faculty of Applied Health Sciences, *Canadian Index of Wellbeing: How are Canadians Really Doing?*, Waterloo (2012). The differences stem from the opportunity to test new indicators found in this research on well-being as well as the opportunity to test more nuanced concepts relating to the sense of belonging to a community. <https://uwaterloo.ca/canadian-index-wellbeing/resources/reports>
- <sup>27</sup> Phoenix Strategic Perspectives Inc., *Arts and Heritage in Canada: Access and Availability Survey 2012*, Ottawa: Canadian Heritage (2012).
- <sup>28</sup> T. Theorell, et al. “A note on designing evaluations of health effects of cultural activities at work,” *Arts & Health: An International Journal for Research, Policy and Practice* 1, 1 (2009). Available at <http://www.tandfonline.com/doi/abs/10.1080/17533010802527993>
- <sup>29</sup> Lars Olov Bygren, et al. “Cultural Participation and Health: A Randomized Controlled Trial Among Medical Care Staff,” *Psychosomatic Medicine Journal* 71, 4 (May 2009). Available at <http://www.psychosomaticmedicine.org/content/71/4/469.full.pdf+html>
- <sup>30</sup> Anna Wilkinson, et al. “Are variations in rates of attending cultural activities associated with population health in the United States?” *BMC Public Health* 7 (2007). Available at <http://www.biomedcentral.com/1471-2458/7/226>
- <sup>31</sup> Koenraad Cuypers, et al. “Patterns of receptive and creative cultural activities and their association with perceived health, anxiety, depression and satisfaction with life among adults: the HUNT study, Norway,” *Journal of Epidemiology & Community Health*, jech.2010.113571 (May 2011). Available at <http://jech.bmj.com/content/early/2011/05/04/jech.2010.113571>

- <sup>32</sup> Lars Olov Bygren, et al. "Attendance at cultural events, reading books or periodicals, and making music or singing in a choir as determinants for survival," *BMJ* (1996) 313:1577. Available at <http://www.bmj.com/content/313/7072/1577.full>
- <sup>33</sup> Lars Olov Bygren, et al. "Attending cultural events and cancer mortality: A Swedish cohort study," *Arts & Health: An International Journal for Research, Policy and Practice* 1, 1 (2009). Available at <http://www.tandfonline.com/doi/abs/10.1080/17533010802528058>
- <sup>34</sup> Gene D. Cohen, S. Perlstein, J. Chapline, J. Kelly, K.M. Firth, S. Simmens. "The impact of professionally conducted cultural programs on the physical health, mental health and social functioning of older adults," *The Gerontologist* 46, 6 (2006): 726-734. <http://gerontologist.oxfordjournals.org/content/46/6/726.abstract>
- <sup>35</sup> Testimonials at <http://www.masconline.ca/en/programs/testimonials.aspx>
- <sup>36</sup> Cheryl Ewing, *Value and Benefits Report*, Toronto: CCI-Ontario Presenting Network (2008).
- <sup>37</sup> Hill Strategies, *Consumer Spending on Culture in Canada*, Hamilton (2008). <http://hillstrategies.com/content/consumer-spending-culture-2008>
- <sup>38</sup> Research Resolutions & Consulting Ltd., *Ontario Arts and Culture Tourism Profile*, Toronto: Ontario Arts Council (2013). <http://www.arts.on.ca/Page4922.aspx>
- <sup>39</sup> Cultural Human Resources Council, *Labour Market Information for Canada's Cultural Sector*, Ottawa: CHRC (2010). <http://www.culturalhrc.ca/research/HRStudy2010/LMI-e.asp>
- <sup>40</sup> Fourth Generation—Long Term Evolution (LTE) networks have been installed in Canada beginning in 2011. Technology companies are working on mobile computing platforms using LTE that would be available wherever customers are and that provide sophisticated interfaces activated by smartphones.
- <sup>41</sup> <http://www.youtube.com/yt/press/statistics.html>

*the* **value**  
*of* **presenting**  
**l'importance**  
*de la* **diffusion**



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