Performing Arts Dissemination Nationally and Internationally

Executive Summary

Presented to
Department of Canadian Heritage
The Canada Council for the Arts
Department of Foreign Affairs and International Trade
National Arts Centre

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Introduction

The executive summary of *Performing Arts Dissemination Nationally and Internationally* is divided into four sections. The first two sections present the findings on dissemination in the last decade. The third section discusses dissemination issues in the future, while the fourth and last section examines dissemination funding issues.[1]

The research was designed to provide a clear picture of the state of dissemination of Canadian artistic products created by non-profit performing arts organizations, both in and outside Canada, over the last ten years. It was commissioned by the Department of Canadian Heritage, the Department of Foreign Affairs and International Trade, the Canada Council for the Arts and the National Arts Centre, four federal partners engaged in an exercise to coordinate their efforts in support of performing arts dissemination in Canada.

The picture obtained has made it possible to identify the strengths and weaknesses of Canadian non-profit arts companies, and also of other stakeholders in the arts community (presenters, contact events, agents, etc.), in disseminating artistic products, and to assess the impact of foreign markets on the development of Canadian performing arts organizations.

Two sources of information were used for the study: statistics from the Performing Arts Survey, conducted annually (now biennially) as part of Statistics Canada's Culture Statistics Program, covering the period studied (1990-1991 to 1996-1997); and a series of interviews with representative individuals from the performing arts community. The research also drew upon many studies, analyses and research projects carried out independently by the partners in this study.

This research, which sought to provide a better understanding of the situation and the problems involved, will enable the four partners to look at their respective areas of action from the perspective of concentrating their resources, in order to foster optimal development of the performing arts sector in Canada.

[1] The methodology employed in our study, our sources of information and the names of our collaborators who made this research possible are presented in appendices.

Research Highlights

1. General state of dissemination in the last decade

The entire performing arts sector has undergone a transformation in order to adapt to the changing realities of markets and audiences. This has led to a new way of looking at arts dissemination and of structuring touring activities to maintain their market share. Changes in audience behaviour patterns, in terms of consumption and attendance at shows, and the increasingly wide range of cultural and entertainment products available to Canadian consumers have affected the behaviour of artistic companies and presenters.

Stagnation in the number of performances and size of audiences has forced Canadian companies to change their strategies in choosing programming and in developing their audiences and/or winning their loyalty.

The increase in the cost of living (higher transportation and accommodation costs, coupled with stagnant artists' fees and incomes) has affected the number, destinations and **length of tours**. Major tours involving a large number of performances in large venues and in several cities have given way to a host of shorter, less costly, more flexible tours and less complex productions (with fewer artists on stage and less elaborate sets).

The homogeneous audience of the past has been replaced by **a fragmented audience,** with increasingly diverse tastes and expectations oriented towards multiple cultural products. Presenters have adapted their programming to the changing supply of products available on tour, thus creating a **transformation of dissemination activity.**

A significant withdrawal of financial support by the municipal, provincial and federal governments (in particular, at the federal level, the Cultural Initiatives Program of Canadian Heritage), experienced to varying degrees in every province, has contributed to the destabilization of networks forged during the previous decade, although the networks were never highly funded in the first place. **Funding provided by federal funding agencies** must now address future dissemination issues. Funding agencies face major challenges in trying to adapt their grant award lead times, to facilitate access to their programs and to support the presence of Canadian companies in foreign markets. They cannot meet these challenges without more concerted action among them.

1.1 Major findings

- The number of performing arts performances and the size of audiences have remained **fairly stable** over the last decade, both nationally and internationally.
- The **number of performances in 1997 was 39,413,** for all disciplines. The number **increased by 3.5%** from 1990 to 1997.
  - The number of performances at home increased by 2.4%, to **24,181** in 1997. They accounted for **61%** of all performances (at home and on tour).
  - There was an **overall decrease** of 7% in the number of performances on tour, with dance being a major exception***.*** The average number of performances per company shows an even greater decline (39%). Tours are now shorter and more numerous, particularly among small and medium-sized companies.
- **Total attendance** at performances in 1997 **was 12.5 million** Attendance **decreased by 4%** during the decade.
  - Attendance at performances **at home** declined by 1.5%, to **7.97 million** in 1997.
  - Attendance at performances **on tour** declined by 16.3%, for all destinations, to a little more than **4 million.**
- Total **revenues generated** by all disciplines increased slightly in the last decade. In 1997, revenues totalled nearly **$375 million**. Revenues associated with ticket sales and performers' fees (at home and on tour) accounted for 39% of total revenues generated in 1997.
- **Tour revenues generated** by all disciplines totalled $**28.5 million** in 1997. Of that amount, 55% came from Canadian tours. The proportion of these revenues generated by dance was 27%, by music 18% and by theatre 55%.

1.2 In Canada

In 1997-1998, there were 334 cities and towns visited by companies whose tours were subsidized by the Canada Council for the Arts. The provinces of Quebec, Ontario and British Columbia formed a network containing 61% of cities and towns visited, although they have 75% of Canada's population. However, half of all Canadians live in a dozen large urban centres,[2] and the very great majority of artists work and present their works within these centres.

The vast size of Canada and its scattered population are well-known problems when it comes to touring in Canada. Travel time and transportation-related costs are major factors affecting the feasibility of a tour. Covering the costs of a tour depends in part on increasing the number of performances. Presenters have set up specialized networks and initiated pooling of show purchases, coordination of scheduling, and programming based on development of the audience.

- Over the decade examined, the proportion **of performances** given throughout Canada in relation to total performances (at home and on tour in Canada and abroad) dropped from 92% to 87%. This decline within the country is due to an increase in performances outside Canada.

[2] Statistics Canada.

Performances on tour in Canada represent **85%** of performances on tour, or **10,306 performances**.

- **Average revenue per performance** from tours is generally lower in Canada than outside Canada, where it can be up to eight times greater.

- **Large companies** have scaled down their touring activities. On the other hand, **small companies** have increased their touring, and this has led to the creation of structured networks of small venues in Canada.

1.3 Outside Canada

- Canada's presence in **foreign markets** is significant, accounting for nearly 15% of the touring activities of companies. This presence has tended to increase over the last ten years, rising from **1,640 to 1,818 performances**. Canadian artists have been successful in penetrating foreign markets because of the quality of their creative work, supported by adequate investment, and also because of their sustained presence in foreign markets over many years. At the same time, market conditions have been totally transformed, and have changed from one continent to another.

- The **United States** market has seen a **decrease of nearly 40%** in the number of performances, while the European market has experienced an increase of 110%.

- Theatre tours to the United States represent approximately 75% of all performances in all disciplines to the United States. This large proportion is thought to be due, in particular, to youth audience theatre. Companies are sometimes able to tour in the United States without a grant because of the high artists' fees and large-capacity halls.

- **Europe** accounted for 50% of Canadian performances presented in foreign markets in 1997. Europe is **the market where growth was strongest**, compared to the other continents.

  Medium-sized companies followed the lead in developing new markets abroad, primarily in Europe, which could support substantial fees, well above what the Canadian market could offer.

  - Dance steadily increased its presence in Europe, with a growth of 196%.
  - Music tours to Europe showed steady growth of 108%.
  - The number of theatre performances also increased, by 92%.

  European networks do much to foster the integration of artists into the community. There are co-producers in Europe who invest in creating shows, in partnership and through concerted action. There are many Canadian creations on the European market that have been co-produced by European presenters on account of the level of funding available in this market.

  The current trend, however, seems to be a slight cooling of European enthusiasm for Canadian creations. That market seems to be turning more towards Eastern Europe, in part for economic reasons.

*On the **Asian market**, there is no consistent trend, and we see very large fluctuations from year to year. In this market, Canadians' greatest weaknesses are a lack of regular presence and a lack of local resources. Entry into the Asian market requires that permanent relationships be established before financial commitments are made. Our competitors are no doubt American and European cultural enterprises, which enjoy substantial funding and can offer their shows in Asia at a low price.*

2. State of dissemination, by discipline, in the last decade

2.1 Dance

The dance sector relies more than ever on a network of specialized presenters. Over the last ten years, this network has become stronger and better defined, to the benefit of small and medium-sized companies.

- Over the last decade, the **total number of dance performances** increased by 50% at home and by 35% on tour (the total number of performances on tour for all performing arts decreased by 7%). In Canada alone, there was an increase of 33%. This dynamism is also reflected in the increased number of small and medium-sized companies. In the dance sector, 35% of **performances on tour** are given outside Canada. The corresponding proportion for all disciplines is 15%. **Large dance companies** have focussed much more on negotiating tours in Europe, and this has had the effect of reducing their tours in Canada. There was a decrease in ballet tours, offset by an increase in contemporary dance tours. Since 1991-1992, **medium-sized companies** have increased their performances on tour by 102%. The largest increase, 149%, was in Europe.

- **Average attendance per performance** has declined, both at home and on tour. At home, this decline has particularly affected large ballet companies. Furthermore, in comparison with other disciplines, dance has achieved by far the highest ratio of **attendance per performance** on tour, with an average of 500 to 600 people (this number, however, represents a decline of 20%). Small companies are tending to produce more and more shows, and this has led to a **decrease in average attendance per performance**. One has to wonder whether a balance is being struck between abundance of creations, proliferation, consolidation and the companies' market share.

- **Artists' fees** seem higher in Quebec and abroad than elsewhere in Canada. Fees for dance shows on Canadian tours are higher than those for other disciplines, particularly in Quebec.

2.2 Music

The balance among the different genres has undergone a complete change. Small groups, individual artists, fusion music, world music, folk music, jazz and Aboriginal music have captured a larger share of the market. At the same time, there has been a decline in audiences for classical music, small ensembles and large orchestras. The dissemination network for classical and symphonic music has been eroded in Canada, except in British Columbia and Ontario where presenters maintain close ties with the audience for this type of music. The consolidation of the network of festivals of popular, folk and world music is playing a major role in the establishment of a tour circuit specifically for these kinds of artists. This continues to be the type of activity that has the greatest appeal for the general public.

- **The average number of performances** per company decreased by 39% on tour and by 22% at home, where average audience size has dropped by 7%.

- Among **large companies, average attendance per performance** remained unchanged over the last decade. However, the number of their performances dropped by 15% (for a total of **2,018 performances** in 1997) and, accordingly, overall attendance dropped by 16% (for a total of **2.1 million** in 1997). Among **small and medium-sized companies, average attendance** per performance grew considerably. Small companies experienced an increase of 18% at home (attaining an average audience size of **383 per representation** in 1997) and 61% on tour. For medium-sized companies, the increase was 85% at home (reaching an average audience size of **933 per performance** in 1997) and 142% on tour.

- Outside Canada, all destinations benefited from tours by Canadian artists. Almost **twice as many** shows were presented in Europe as in the United States. However, the demand for Aboriginal artists from the communities of Northern Canada did tend to increase in the United States. These shows, which often include dance, are perceived as cultural celebrations.

2.3 Theatre

- Theatre accounted for 74% of all performances given by all performing arts companies (**29,302 theatrical performances i**n 1997). The **average number of performances** per company fell by 35% at home and 40% on tour. This decline reflects the reality experienced by the performing arts as a whole. Theatre productions account for more than **80% of total performances** on tour. Nearly 90% of performances on tour are given in Canada. There has been a decrease of 9% in performances on tour, except in Europe, where there has been an increase of 92%. It should be noted that the majority of touring theatre presentations are young audience theatre (see below) or French-language theatre

- With theatre audiences accounting for 60% of all audiences reached by all performing arts companies (**7.46 million people** in 1997), theatre seems to be doing well. However, **theatre audiences** have actually declined by 4% at home (for a total of **4.56 million** in 1997) and by 24% on tour (for a total of **2.9 million** in 1997). The ratio of attendance per performance dropped off for tours (by 17%), but remained about the same for shows at home. A larger number of companies had to share the available audience for theatre. This resulted in a fragmentation of the market, and hence a smaller number of performances at home and on tour.

- Several large companies **stopped their touring activities** around the middle of the 1990s. The high cost of touring and competition from resident companies in regional markets caused large companies to withdraw considerably from touring markets. The advent of foreign co-producers as presenters **gave a new impetus to international tours by Canadian theatre companies**, and helped them penetrate the European market. **Anglophone theatre adopted a co-presentation approach** in Canada. This gave it a new impetus to tour with bigger shows. The National Arts Centre certainly played a part in this development. The major challenges continue to be to extend the life of newly created plays and to increase the number of performances and the number of tours.

2.4 Youth audiences

- In the last year of the period analyzed, the youth audience sector reached an audience of nearly **3.2 million**, both in Canada and abroad. This represents **one quarter** of the total audience reached by Canadian performing arts companies. However, average attendance per performance was on the decline (by 3%).

- In 1996-1997, the youth audience sector presented somewhat fewer than **12,000 performances**, or 30% of the total supply. Over the decade, the number of performances decreased from **15,000 to 12,000.** More than 87% of these performances were theatre.

- The **school clientele** was reduced because of more restrictive policies on school outings and extracurricular activities. In the 1990s, the effects of cuts in education budgets began to be felt, leading to the disintegration of a first-rate arts dissemination network in terms of developing future audiences. The school sector has not yet acquired the market share that it could. “The school population, which is expected to grow over the next few years...will stabilize and eventually diminish."[2] There is thus a need to initiate new actions to foster the expansion of the youth audience market, and more particularly to preserve the gains that have made it possible to establish a youth audience network: the school environment, festivals, specialized presenters.

- At the present time, the Canadian market does not have the critical mass to bring large enough youth audiences into large venues. Ticket prices have remained virtually unchanged over the last ten years. **Artists' fees** are very low, and cannot ensure the viability of large and medium-sized companies, which must depend on foreign markets, with their higher fees, in order to survive. The low artists' fees in Canada give small companies an advantage in presenting their shows.

[2] Secor/Zba marketing.

3. Dissemination issues for the next decade

The **opportunities** provided by the global marketplace give artists access to huge audiences, fostering their renown and the cost-effectiveness of productions.

The challenges lie in the sharing of financial risk and the encouragement of artistic risk-taking. Failure to take risks is the major obstacle to market development. Stakeholders in every part of the dissemination system must take risks to develop audiences and networks, in keeping with artistic creations. Risk can be minimized by developing partnerships among responsible stakeholders, who will work together to achieve a stable dissemination ecology: artists, producers, agents, presenters and finally the public.

The new paradigms guiding stakeholders in the dissemination process aim at concerted actions, starting with a close partnership between presenters, artists and the public.

3.1 Partnerships and coproductions

The new paradigm seeks to achieve cultural development throughout Canada by developing audiences through a **new partnership: presenter-artist-community.** All the efforts are to that end. The goal is to harmonize the presenter's presence in the community with the artist's participation in the community by stressing the spin-offs from successful performances.

The success factors are:

- Preserve a multi-year planning vision, in which the approaches of the artist and presenter are unified.
- Allow mutual risk-taking (both financial and artistic risks), fostered by coproduction or co-presentation.
- Foster partnership with the media.

3.2 Developing audiences

A critical mass of consumers allows for higher revenues, which means higher fees for artists. Larger audiences mean more performances. Thus, the **development of audiences** plays a major role in ensuring the survival of the performing arts. Continuity of effort in this area makes it possible to preserve the gains made and to undertake new expansion activities.

The success factors are:

- Preserve the excellence and quality of artistic programming.
- Listen to the needs of the audience, and target the audience on the basis of the artistic work.
- Increase the audience's interest through complementary activities offered by artists, such as in residence workshops.
- Make art education a part of the school curriculum.
- Take advantage of surges in audience growth generated by festivals.

3.3 Strengthening networks

Presenters have joined together according to their specialty or the traits that distinguish them from one another. This increased coordination has **transformed networks,** resulting in increased stability in the dissemination ecology: contact event networks, regional networks of performance venues, festival networks and school networks.

The success factors are:

- Foster continuity in concerted action, and preserve the gains achieved through networking.
- Give an impetus to all existing artistic dissemination networks, wherever it is possible to conduct a tour and encourage an increase in the number of performances.

3.4 Penetrating foreign markets

The importance of **penetrating foreign markets** was recognized, and became *a management consolidation issue.* The success achieved by Canadian artists in penetrating foreign markets is the result of their sustained presence over many years. In this regard, the 1990s reaped the benefits of work done in the 1980s.

The success factors are:

- Resolve the problems associated with funding foreign tours.
- Foster the creation of very high-quality shows that can compete with our neighbours anywhere in the world.
- Maintain the Canadian presence in foreign markets.

4. Dissemination funding issues

Funding support for dissemination is part of the process of strengthening dissemination. This process is ensured, in the first place, through adequate multi-year funding. **Resources allocated collectively by the various touring assistance programs have been deemed insufficient to ensure optimal development of touring.**

4.1 Basing programs on a vision and on financial resources

Adequate financial resources for orchestrated programs will ensure support of future performing arts dissemination. In short, this will make it possible to foster:

- artistic programming pursuing its quest for excellence;
- multi-year programming benefiting from the gains achieved by the success of a show from one season to the next;
- an increase in the market share of the performing arts, to ensure their long-term survival;
- maintenance of a healthy dissemination network based on grouping presenters, on establishing common projects, on adapting successful projects and on maintenance of concerted action in such forms as contact events, festivals and conference meetings, dialogue forums and joint advisory boards.

4.2 Adapting lead times and facilitating access to programs

In the case of touring grants, there is an interval between the moment when the presenter proposes a tour to an artist and the moment when the artist receives confirmation that a grant will be provided from funding agencies. The potential conflict between the timing of the confirmation and the time the agency requires to respond means that careful synchronizing of timetables is required. By knowing in advance that a grant will be awarded, the artist can make efforts to increase the number of venues on the tour and thereby maximize its impact. The Canada Council for the Arts and the Department of Foreign Affairs and International Trade have made efforts along these lines.

4.3 Sustaining a presence in foreign markets

The development of foreign markets requires **ongoing action and a sustained presence over a long period in these markets** by artistic companies and their Canadian or foreign representatives. The grants programs must support all these steps and sustain the repeated action over the long term.

- Ensure significant investments.
- Aim to create a network of foreign partners by fostering coproduction and the presence, within Canadian territory, of co-presenters, co-disseminators and foreign buyers.
- Encourage promotion and pre-tour trips, and exploratory missions (prospecting tour or attendance at contact events, trade fairs and market events).
- Encourage collaborative work with local Canadian representatives outside Canada.
- Make it possible for the artist to sustain a presence abroad, and for the necessary follow-up to be done after a successful tour.

- At the present time, there is a dichotomy between foreign market development grants for cultural industries (for-profit organizations) and grants for non-profit organizations. Thought has to be given to the common needs of these two categories of organizations, and to the direct spin-offs from foreign tours. A grant for an exploratory mission may be cost-effective, even in the case of non-profit organizations.

  Those interviewed expressed dissatisfaction at the dichotomy at Canadian Heritage, where there are assistance programs for exploratory missions in the cultural industries sector, and in particular for records (FACTOR/Musicaction), film (Telefilm Canada) and books (BPIDP/PADIE), but there is no assistance program of this kind adapted to non-profit organizations. Programs for non-profit organizations exist at the Canada Council for the Arts and DFAIT, but there is insufficient funding.

4.4 Harmonization and concerted action among federal funding agencies

The partners in this research play a key role in developing and strengthening dissemination for arts companies both nationally and internationally. The weaknesses exhibited by these funding agencies continue to be poor cooperation, reduced budget envelopes, lack of multi-year commitment and red tape.

A consolidation of efforts on the part of the various funding agencies, namely Canadian Heritage, the Canada Council for the Arts and the Department of Foreign Affairs and International Trade would facilitate the proper development of domestic and foreign markets for disseminating the performing arts:

- Concerted action in programs **related to audience development**, reinforcing networks, sharing financial risks and encouraging artistic risk-taking through partnership and coproduction.
- Concerted action in **programs to develop and maintain foreign markets**;
- Concerted action in **shortening lead times for awarding touring grants.**

4.5 Fostering the work of organizations with a mandate to bring stakeholders together for concerted dissemination action

The study compares agencies, by way of examples of avenues that have been pursued which have each in their own way set up programs to bring organizations together to ensure proper development of the performing arts in the country. Among these models, we find **a number of original Canadian examples** that have one thing in common: the injection of financial resources by funding agencies. The study also refers to **foreign examples** where the model demonstrates even greater boldness.

Appendices
Methodology, Bibliographies and Collaborators

Methodology

Data quality (classification of shows, interpretation limits)
Our analysis covered the period from 1990-1991 to 1996-1997. The statistics were taken from the Performing Arts Survey conducted each year as part of Statistics Canada's Culture Statistics Program. The target population includes all professional non-profit performing arts groups, serving adult or youth audiences, whose principal activities involve the disciplines of dance, music and theatre, regardless of their cultural affiliation, and whose artistic directors and/or administrators and/or artists are paid. The survey includes groups that have applied for, or obtained, a grant from the Canada Council, Canadian Heritage or various provincial departments. For-profit performing arts groups, presenters and, in most cases, community-based (amateur) companies were excluded.

Categories
The companies were grouped, by size, in the following categories:
Theatre and Dance: small companies (under $200,000), medium-sized companies ($200,000 - $800,000), large companies (over $800,000). *Music:* small companies (under $500,000), medium-sized companies ($500,000 - $1,000,000), large companies (over $1,000,000).

Definitions
Disciplines were broken down according to the definition applied by the Canada Council for the Arts, and include all cultural affiliations and all audiences (unless otherwise specified):
Dance: Ballet companies and contemporary, modern or jazz dance companies.
Music: Orchestras, choirs, and groups and ensembles, working in chamber music, contemporary music, current music, folk music, jazz, Aboriginal music and other musical genres. Opera was excluded from this research project.
Theatre: Theatre and musical theatre companies.
Youth audiences: Theatre, dance and music performances primarily aimed at youth audiences.
Dissemination: Presentation, by an artist or arts company, of a show to an audience.
At home: Any show that is disseminated in the artist's place of origin or in the environment of the place of origin, and that does not involve the payment of a per diem.
On tour: Any performance or set of performances given outside the artist's city of origin and involving payment of a per diem.
Presenter: Programmer or paid officer of a performance venue who has a professional staff or production infrastructure.
Co-producer: Producer or presenter who invests resources in the creation of another artist, and who usually undertakes to present that creation under normal market conditions.
Co-presenter: Producer or presenter who does not pay artists' fees but shares the financial risk of an individual presentation with another artist.

Note to Reader: Comparability of Statistics Canada data

In 1996-1997, 124 performing arts companies were added to the survey database. It was also determined that these companies had been active in 1994-1995. The increase in the number of organizations surveyed reflects not only recently created companies, but also better survey coverage. Improved cooperation with various arts organizations seems to have allowed Statistics Canada to improve its mailing list and hence its population list. These additional companies accounted for approximately 4% of total receipts in 1996-1997. Most of these companies are small, and are located in Quebec or Ontario. Over fifty per cent of them work in the theatre sector.

Series of interviews, and final picture

A series of interviews was conducted with 40 individuals, who were representative of the performing arts community, who were **members of dissemination and contact networks, members of artistic organizations, or producers or agents.** These persons were selected for their representativeness in regard to regional markets, foreign markets, disciplines, types of presenters, membership in associations, membership in arts councils and **representation of the partners in this research.**

These interviews made it possible to put the data supplied by Statistics Canada into perspective, in order to arrive at the final picture and to identify the trends that have marked the last decade. Some of the responses guided the selection of models for initiating the "positive actions" cited as examples in Chapter 7 of the research report.

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