

Environmental Scan of Contemporary Dance Presentation in Canada

Summary

June 8, 2005

This study was prepared for the Department of Canadian Heritage, the Canada Council for the Arts and the Conseil des arts et des lettres du Québec.

Preamble

This study was funded by the Department of Canadian Heritage, the Canada Council for the Arts and the Conseil des arts et des lettres du Québec. The views or opinions expressed in the study are strictly those of its authors and do not necessarily represent those of the fund providers or of the Government of Canada.

Ce document est aussi disponible en français.

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Background and mandate

In response to the cessation of activities of the *Festival international de la nouvelle danse* (FIND), and the difficulties experienced by the Canada Dance Festival (CDF) in 2004, their funding partners decided to undertake a thorough analysis of the FIND and the CDF and to assess the environment in which dance festivals operate.

Gagné Leclerc Groupe Conseil was commissioned to produce a report, which was divided into two work plans. This document reports the findings of the research and analysis pertaining to Work Plan 2 which was intended to provide:

“...an accurate, up to date assessment of the contemporary dance presenting environment in terms of the artistic community and its organizations, the audience and the funding partners.”

Introduction

In addition to the summary, some contextual information and a brief introduction to the different sections in the document was developed. The report is organized into six sections:

Methodology – This section outlines the approach, process, background resources, consultations and constraints of the study.

Key concepts for understanding the contemporary dance presentation environment – This section offers the conceptual framework and some keys to understanding the report. It covers the ecology of contemporary dance presentation, the revenues/costs/results model, specialized and multidisciplinary presentation models and the system’s funding scheme.

Key players in contemporary dance presentation – This section presents the main findings, challenges and reflections associated with the various players in contemporary dance presentation in Canada: creation/production organizations that present their own shows (self-presentation), specialized and multi-disciplinary presenters and their networks, specialized and multi-disciplinary festivals, international presenters, showcases and agents.

Venues and infrastructures adapted to contemporary dance – This section focuses on the issue of rehearsal and presentation spaces suitable for contemporary dance and the impact on the quality, number and accessibility of performances, as well as attendance.

Contemporary dance presentation activities – Based on available statistical data, this section provides a picture of contemporary dance presentation activities in Canada. It is followed by the main comments gathered during the consultation on Canadian and foreign dance presentation markets, which are then put into context with the main quantitative findings.

Funding for contemporary dance – This section presents the current picture as well as the evolution of public funding for contemporary dance. It also presents some of the challenges related to private sector funding.

Contemporary dance audiences – This section discusses available studies and data on dance audiences in this discipline and summarizes the main conclusions.

Major issues and challenges for contemporary dance presentation – By way of conclusion, this section summarizes the issues and challenges identified by the analysis of the contemporary dance presentation environment in Canada.

Methodology

This report is based on both a processing and analysis of documents and statistics and a wide-ranging consultation with members of the contemporary dance community across Canada.

Literature search

The literature and data include public documents such as statistics and findings by Statistics Canada, the Canada Council for the Arts (CCA), the *Observatoire de la culture et des communications* [Quebec culture and communications observatory], the *Conseil des arts et des lettres du Québec* (CALQ) [Quebec council on the arts and letters], and the Ontario Arts Council.

Unquestionably, the most complete national databank on dance is Statistics Canada's Performing Arts Survey. As a result, we based our depiction of contemporary dance presentation in Canada on this resource. To avoid the major bias inherent in the existence of major classical ballet companies in the large performance company category, we considered only the survey data pertaining to small- and medium-sized dance companies in order to reflect the reality of this specific discipline as accurately as possible. In order to identify the avenues, nature and extent of public funding for contemporary dance, a database was also constituted using federal, provincial (British Columbia, Ontario and Quebec) and municipal (Vancouver, Toronto and Montreal) grants.

Consultation

Consultations were undertaken both through individual interviews and group discussions with 128 key representatives of Canada's contemporary dance community to gather their perceptions, opinions and expectations. Participants were selected to ensure representation in terms of both regional distribution and professional role (creation/production companies of various sizes, presenters, representatives of organizations, etc.). The results of the consultation are presented throughout this report in a way that maintains confidentiality and the anonymity of participants.

Study Constraints

Throughout the study, we were faced with major obstacles relating to the availability, quality and scope of available data, which prevented us from painting a complete picture of the contemporary dance presentation environment. These obstacles included:

- Identifying performing companies and presentation organizations working in the specific area of contemporary dance;
- The fact that contemporary dance suffers from a lack of statistical data and coherent and reliable information on its activities. Presentation data was supplied primarily by dance creation/production companies and not presenters;
- Measuring the presentation activities of contemporary dance using a methodology that allowed us to focus only on small- and medium-sized contemporary dance performing companies;
- A static picture of a dynamic situation;
- The complexity of determining the scope of public funding and the avenues it uses to support contemporary dance presentation activities;
- The difficulties in evaluating the programming slots available for contemporary dance shows with national presenters.

Key concepts for understanding the contemporary dance presentation environment in Canada

This section provides information about each of the players, the relationship between them and the environment in which they operate. This must be understood before proceeding to the more detailed analysis in the body of the report.

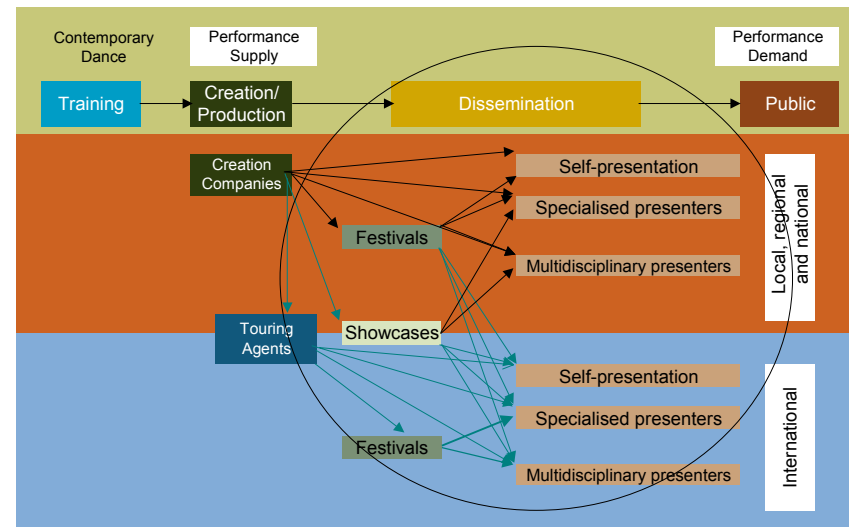
Overall ecology of contemporary dance presentation in Canada

Contemporary dance presentation is the bridge between supply and demand in contemporary dance performance. This point of contact between the public and dance occurs in a specific venue and market. The conditions of contemporary dance presentation vary according to the market (local, regional, national, international) and the mode of presentation.

Modes of presentation

Self-presentation refers to a company presenting its own work without the intervention of a presenter. Basically, the company rents a venue and takes charge of the administrative, technical and promotional aspects of presenting the work. With this type of presentation, the creation/production company assumes the financial risks associated with presenting its own program and keeps the revenues from ticket sales. This approach is very labour intensive and extremely risky and difficult.

Generally speaking, however, a creation/production company assigns the job of *presentation* to a partner, either a specialized presenter (who only presents dance), a multidisciplinary presenter (who presents performing arts) or a festival (specialized or multidisciplinary). In this context, the presenter takes on the financial risks associated with presenting the artistic organization's work. Revenues from ticket sales go to the presenter and companies are paid a fee per performance. The presenter also looks after the administrative, technical and promotional details. In some markets, several different risk-sharing formulas coexist.



Revenues, costs and results presentation model

Very often in contemporary dance, the cost of a performance is higher than the revenue it generates, which means a loss for the presenter. Even a successful level of attendance at a series of performances does not always translate into financial success. In fact, it is not uncommon to find that after a successful run, additional performances contribute directly to increased losses for the presenter.

Specialized presentation model (including specialized festivals)

The main focus for a specialized presenter (and a specialized festival) is programming performances of a specific discipline, in this case, contemporary dance. Some specialized presenters manage presentation spaces, although most are required to rent them.

Specialized presenters operate within two complementary, but sometimes contradictory, frameworks, a market framework and a cultural action framework that is dependent on government support.

Revenues earned from the market framework (basically, ticket sales and sponsorship) account for between 20% and 50% of total revenues for specialized presenters. Several presenters receive support from a local partner (10% to 15%). The cultural action framework is primarily supported by the Arts Presentation Canada (APC) program of the Department of Canadian Heritage and certain provincially run programs. Because of their mandate and their small size, support for cultural action can constitute 40% to 65% of these organization's revenues. This public support allows them to take some risks and to contribute to disciplinary development (knowledge of dance, ability to contextualize dance, to market it, to develop an audience for it, etc.)

Multidisciplinary presentation model

The primary concern for a multidisciplinary presenter is programming shows for a whole range of performing arts. Multidisciplinary presenters usually manage presentation venues.

Revenues earned from the market framework account for between 65% and 85% of total revenues for these multidisciplinary presenters. Several presenters receive support from a local partner (10% to 25%). The cultural action framework is primarily supported by APC and certain provincially run programs. Given their mandate, the fact that they usually manage a presentation venue and their size, support for cultural action may only account for 5% to 10% of their revenues. As a result, the level of public support for cultural action severely curtails their ability to take risks and to contribute to disciplinary development.

Public funding

Public funders are key players in every aspect of contemporary dance presentation. Their programs (funding objectives and conditions) and the grant amounts define and influence the whole architecture of contemporary dance presentation in Canada.

Key players in contemporary dance presentation in Canada

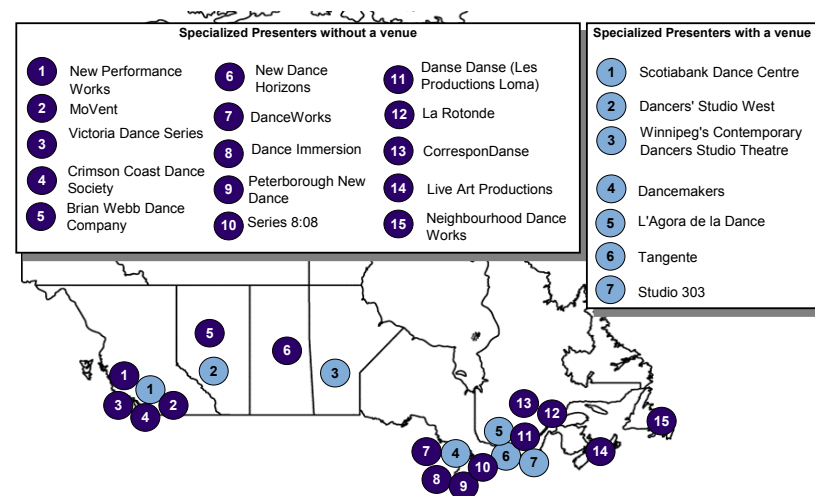
In addition to self-presentation, contemporary dance presentation is shared between a few specialized presenters who may or may not have their own performance space, multidisciplinary presenters with varying degrees of commitment to the discipline, and specialized and multidisciplinary national and international festivals. Presentation activities are also affected by, among other things, development efforts by presenter networks, participation in showcases and the work of agents.

Self-presentation

Self-presentation is generally rarely done given the financial risks involved, the arduous organizational and management efforts required and the lack of infrastructure and suitable, affordable space. For some companies, it is a last resort.

Specialized presenters

A distinctive feature of the contemporary dance presentation environment since the eighties has been the emergence of organizations dedicated specifically to presentation, promotion and development in the discipline. These specialized presenters regularly offer Canadian audiences contemporary dance programming and promote disciplinary development. Although these presenters have become a mainstay in the creation/presentation ecology of contemporary dance, they are relatively thin on the ground and cannot meet all the needs and expectations of performing companies. These specialized presenters program seasons that they present to the public, usually in either a small space that they manage (1 to 7, figure opposite) or in other presentation venues with which they have partnered (1 to 15 figure opposite).



Multidisciplinary presenters

Contemporary dance presentation by multidisciplinary presenters is essential to the discipline not only because self-presentation and specialized presenters cannot afford sufficient presentation opportunities to absorb the performances offered, but also because it reaches new audiences interested in other artistic forms, who live in regions where there are no specialized presenters or who live in outlying areas. Contemporary dance presentation by multidisciplinary presenters poses some major problems, in terms of presenters' level of interest, artistic choices, ill-suited venues, revenue potential of performances, ability to develop audiences for the discipline, etc.

Dance presenters' networks

There are two networks of dance presenters in Canada: CanDance at the national level and *La Danse sur les routes du Québec* in Quebec. The latter is a member of CanDance. These networks play a major role in dance presentation.

Canadian contemporary dance festivals

Festivals that program contemporary dance play an important role in presentation, not only because they offer audiences direct access to dance, but also because they tend to provide points of contact and exchange between creation/production companies and other presenters. They may therefore have a multiplier effect on dance presentation at the local and/or international levels. Specialized contemporary dance festivals are currently experiencing major difficulties (the cessation of activities of the *Festival international de nouvelle danse*, Canada Dance Festival cutbacks, lack of resources for regional dance festivals, etc.). Although multidisciplinary festivals are tending to introduce more contemporary dance into their programming, one can question their real capacity to offset the lack of an international showcase devoted specifically to disciplinary development of contemporary dance.

Contemporary dance presenters abroad

The export market is essential for many contemporary dance companies in Canada, and particularly in Quebec. Presently, foreign presenters are important players in the ecology of contemporary dance presentation in Quebec and Canada, which is a concern given, among other things, the new trends emerging in international markets (tighter markets, stronger competition, etc.) and the lack of an international showcase for Canadian contemporary dance.

Agents

There are two kinds of agents who do very different jobs, but both play a significant role in the presentation environment: these are development agents and touring agents. There are not many of them, and the limited resources available to companies and presenters can make it difficult to engage their services.

Performing arts showcases in Canada

In addition to festivals, contemporary dance performing companies have another tool available to promote themselves to other presenters, namely, performing arts showcases. In terms of national presentation, the primary Canadian performing arts showcases for dance are the Canadian Arts Presenting Association (CAPACOA) and the Réseau indépendant des diffuseurs d'événements artistiques unis (RIDEAU) and, in the international arena, the International Exchange for the Performing Arts (CINARS). Although these showcases are important to a degree, they do not claim to be a panacea for the problems that exist in contemporary dance presentation regionally, nationally and internationally.

Venues and infrastructures adapted to contemporary dance in Canada

The matter of performance and presentation spaces and infrastructure is at the heart of the contemporary dance presentation issue in Canada. The stakeholders consulted across the country underlined the shortage of rehearsal and presentation space appropriate to this discipline and the impact this has on the calibre, number and accessibility of performances as well as on attendance.

Without access to production studios and venues properly equipped for presentation of their work, the contemporary dance community does not have the basic tools it needs to provide the calibre of work expected, to be presented, to reach its audience and to be able to develop.

Contemporary dance presentation activities in Canada

A panorama, albeit incomplete, of the relative level of activity involved in the various facets of contemporary dance presentation in Canada, emerged from the processing of the available statistical data. However, despite the available data and its thorough analysis, we are unable to bring a rigorous and statistical response to the following fundamental question:

“Is there an equilibrium between the abundance of creations, the growth and consolidation of companies and the presentation market available to them?”

In our view, the issue of whether or not there exists an actual crisis in the environment of contemporary dance presentation must be grounded in real, solid data. As a result, in the absence of consistent and reliable data on contemporary dance, it is impossible to answer this question. Obviously, the fact that the lack of information prevents from making a finding or a quantitative evaluation does not mean that it does not exist.

Summary of findings pertaining to the presentation activities of large contemporary dance companies

The six large contemporary dance companies¹ account for a significant share of the contemporary dance performances, they tour relatively more often than the average company and earn a considerable portion of their revenues from earnings (ticket sales and fees).

Summary of findings pertaining to the presentation activities of small- and medium- sized contemporary dance companies in the Canadian market

The Canadian market constitutes the main area of activity for small- and medium- sized contemporary dance companies, but the independently earned portion of revenues associated with presentation activities in Canada is extremely small and contributed very little to company budgets. Although audiences are small and audience sizes have fluctuated since 1998, attendance at contemporary dance performances over the past 30 years has risen considerably. Like any other performing art, contemporary dance presentation activities in Canada are not cost-effective and cannot be counted on to support the existence of creation/production companies and the budgetary equilibrium of presenters. Without government assistance, all the data seems to indicate that the entire chain of the creation and presentation of contemporary dance would crumble because it could not generate enough revenue from its presentation activities and attract sufficient private funding.

Summary of findings pertaining to the presentation activities of small- and medium- sized contemporary dance companies in the international market

Contemporary dance is one of the disciplines that tours the most outside Canada and it has had great success doing so for the past several years. International touring is no longer solely the domain of the large companies from Québec, as had been the case since the nineteen eighties, as small- and medium- sized companies have been gradually getting involved over the past few years. In fact, small- and medium-sized Canadian dance companies produce over half the dance performances presented on international stages and more than one sixth of all the performing arts presented abroad. Performances by small- and medium- sized Canadian contemporary dance companies now account for a considerable share of their presentation activities and, relatively speaking, generate far higher revenues than can be generated at home.

¹ La La La Human Steps, Les Ballets Jazz de Montréal, Compagnie Marie Chouinard, O'Vertigo Danse, Decidedly Jazz Danceworks, Toronto Dance Theatre.

Funding for contemporary dance in Canada

Public funding

Current picture

In contemporary dance, the vast majority of presentation activities could not occur without major financial support from governments, a situation which also applies to the other performing arts.

The report illustrates that in 2002-2003 the governments of Canada, Quebec, Ontario and British Columbia gave more than \$19 million to support activities related to contemporary dance in Canada. About 55.3% of that amount went to creation, 38.4% to presentation and 6.3% to associations and service organizations. Organizations in Quebec got the largest share of the grants (over \$12.8 million), followed by Ontario (\$4.2 million) and British Columbia (\$2.2 million).

For all three provinces, the federal government's contribution reached

\$10.1 million, which is more than 52% of total contributions. The Government of Quebec supported contemporary dance to the tune of \$6.4 million and its support to dance presentation (52.9%) made it the provincial leader for presentation ahead of Ontario (15%) and British Columbia (11.2%), where the contribution from the Government of Canada accounted for about 80% of the total amounts allocated to presentation support.

2002-2003	Quebec		Ontario		British Columbia		Total	
Creation								
Federal	\$3,109,520	42.98%	\$1,292,800	55.13%	\$871,600	76.05%	\$5,273,920	49.17%
Provincial	\$3,498,025	48.35%	\$579,320	24.71%	\$199,000	17.36%	\$4,276,345	39.87%
Municipal	\$627,500	8.67%	\$472,715	20.16%	\$75,500	6.59%	\$1,175,715	10.96%
Sub-total	\$7,235,045	100.00%	\$2,344,835	100.00%	\$1,146,100	100.00%	\$10,725,980	100.00%
Presentation								
Federal	\$2,112,975	42.48%	\$1,172,686	82.47%	\$815,900	77.74%	\$4,101,561	55.09%
Provincial	\$2,630,987	52.89%	\$212,470	14.94%	\$118,000	11.24%	\$2,961,457	39.77%
Municipal	\$230,375	4.63%	\$36,725	2.58%	\$115,600	11.01%	\$382,700	5.14%
Sub-total	\$4,974,337	100.00%	\$1,421,881	100.00%	\$1,049,500	100.00%	\$7,445,718	100.00%
Associations							\$0	
Federal	\$280,500	41.88%	\$402,500	80.41%	\$43,300	79.01%	\$726,300	59.28%
Provincial	\$334,300	49.91%	\$62,265	12.44%	\$11,500	20.99%	\$408,065	33.31%
Municipal	\$55,000	8.21%	\$35,765	7.15%	\$0	0.00%	\$90,765	7.41%
Sous-total	\$669,800	100.00%	\$500,530	100.00%	\$54,800	100.00%	\$1,225,130	100.00%
Total								
Federal	\$5,502,995	42.73%	\$2,867,986	67.21%	\$1,730,800	76.91%	\$10,101,781	52.08%
Provincial	\$6,463,312	50.18%	\$854,055	20.01%	\$328,500	14.60%	\$7,645,867	39.42%
Municipal	\$912,875	7.09%	\$545,205	12.78%	\$191,100	8.49%	\$1,649,180	8.50%
Total	\$12,879,182	100.00%	\$4,267,246	100.00%	\$2,250,400	100.00%	\$19,396,828	100.00%

Subsidies from federal, provincial, municipal governments in Quebec, Ontario and British Columbia, 2002-2003

Evolution of funding

The report also describes how federal grants to support touring and presenting have evolved in recent years, as well as the way in which the Conseil des arts et des lettres du Québec (CALQ) grants have changed. In all three cases, grants have increased considerably.

From 2001 to 2003, the period for which we have complete data, touring grants rose by 64.3%. However, it would seem that the increase has not kept pace with the growth in requests for touring money.

From 1998 to 2003, grants to contemporary dance presenters from the Department of Canadian Heritage and the Canada Council for the Arts more than doubled. Larger grants, provided under presentation support programs, were made possible by major increases in federal government funding. In 2004, however, when a three-year funding commitment from the Canada Council for the Arts came to an end, a few specialized dance presenters saw a reduction in the grants they received from the federal government, while others received increases.

From 1999-2000 to 2003-2004, the Conseil des arts et des lettres du Québec (CALQ) received significant increases in its funding and increased its support for contemporary dance presentation by about \$1 million, or 59.5%.

The report highlights the fact that although funding from the Governments of Canada and Quebec has risen in the past few years, this does not necessarily mean that dance presentation is not under-funded. In fact, based on our consultations, needs and requirements have increased at a faster pace than the grants.

The report also highlights problems resulting from relations with funders operating with different mandates, interests, mechanisms and deadlines, regional inequities in opportunities for public funding and the trend towards an increased proportion of non-recurring funds.

Essentially, contrary to the widespread belief in the dance community, public grants for presentation have increased a great deal in recent years, in absolute terms. Despite the overall increase in funding, great dissatisfaction is still very prevalent in the dance community, particularly concerning grant allocation, criteria, conditions and objectives. It would be advisable to engage in a process of focussed, comprehensive reflection on funding for contemporary dance and its presentation and on harmonizing application, processing and data collection procedures.

Private sector funding

Although it can be difficult for some leading-edge artistic forms to foster relations with the private sector, these relations are nonetheless important. Links with the private sector help to increase financial resources, and, very often, they are a prerequisite for government funding. However, presenters and festivals specialized in a specific discipline are generally at a disadvantage because the private sector is usually looking for high-profile organizations or events that reach the broadest possible audience.

As private sector funding is very limited and the competition for it is fierce, the vast majority of those who took part in the consultations felt that public funders had unreasonable expectations of contemporary dance organizations in terms of private sector fundraising.

Despite the inherent difficulties, there are still other options the community has yet to explore for optimizing private sector fundraising, including the possibility of pooling their fundraising efforts.

Contemporary dance audiences in Canada

This section of the report provides an overview and analysis of recent research on dance audiences. Following a literature review, the report discusses some of the main statistical findings regarding contemporary dance audiences, notably, that audiences are predominantly female and young and that their attendance at shows can vary with the language spoken at home, accessibility of venues and available time and money. The report goes on to deal with audience development initiatives, the role of the media in developing audiences for contemporary dance and the sensitive issue of the “accessibility” of the work.

Major issues and challenges for contemporary dance presentation in Canada

The report concludes by identifying the issues that should be at the heart of our concerns and of all reflection on contemporary dance presentation:

- Consolidating contemporary dance creation/production companies;
- Enriching and diversifying the offering (among other things, in terms of repertoire, format and quality) presented to the public, in both the major centres and the regions;
- Strengthening the discipline and the environment in a world of changing markets and stiffer competition, both nationally and internationally;
- Supporting presenters (specialized, multidisciplinary, festivals);
- Providing adequate, coherent and, ideally, multi-year funding;
- Producing a reliable, harmonized body of statistics on contemporary dance.

Although the contemporary dance community is actually extremely fragile and at the mercy of any change in its environment, it shows extraordinary resilience and vitality nonetheless.

The dynamism, quality, originality and leading-edge nature of contemporary dance in Canada are widely recognized. It is unquestionably one of our most prized artistic treasures abroad. We must recognize the important role contemporary dance plays and ensure that it can continue to thrive and reach out to audiences.