

ONTARIO DANCE SECTOR STUDY
PHASE 1

Prepared for CADA-ON and DanceOntario
Consultant: Jane Marsland

Introduction:

The Canadian Alliance of Dance Artists Ontario (CADA-ON) and DanceOntario applied for and were awarded funds from the Ontario Arts Council's Compass Program to hire a consultant (Jane Marsland) to complete the first phase of a study of the Ontario professional dance sector, specifically a needs assessment and environmental scan of the dance field. The objective of Phase 1 is to lay the groundwork for Phase 2 which will result in a business plan for the implementation of a changed infrastructure in the dance service organization environment enabling a more robust dance sector.

The process was guided by a Steering Committee of 6 members - Elizabeth Chitty, E.D. CADA-ON; Rosslyn Jacobs Edwards, E.D., DanceOntario; Nova Bhattacharya, Catherine Carpenko, Jennifer Watkins, Lucy Rupert.

The environmental scan provided some insight into the current reality of the dance sector and provided context for both the development of the survey instrument as well as the analysis of the survey results. The scope of Phase 1 of the Ontario Dance Sector Study was limited by the funding and time resources available as well as the availability of relevant secondary research on the current conditions of the dance sector.

In early May 2010 the survey on the needs assessment was distributed to the membership of the two dance service organizations and an informal group of younger dance artists who have formed the LOVE-IN. Initially the consultant and the Steering Group wanted to have broader input from the Ontario Dance Sector, but with the constraints noted above, it was decided to undertake the broader community consultation in Phase 2.

This report endeavours to give as accurate a picture as possible of the current state of health of the professional dance sector based on the information obtained from the respondents of the survey and the review of the most recent reports and findings related to the dance sector. The term 'dance' is not genre specific and survey respondents were asked to self-identify the dance genre they practiced.

The report attempts to identify and examine emerging themes or trends of interest. Where possible, quantitative findings are followed by qualitative observations.

PART 1

ENVIRONMENTAL SCAN

Key Findings

It is important to note that many of the key findings in the environmental scan were soundly affirmed by the respondents in the survey.

Funding climate and political environment:

The funding policies of the arts funding bodies have been established over time to respond to the ongoing needs of the dance sector. These needs have not changed substantively over the past 30 years as reflected in the report, *The Growth of Dance in Canada Over Three Decades* (Prepared for the Canada Council for the Arts, April 2004, T.J. Cheney Research Inc.):

- the need to provide continuing professional development beyond initial, pre-entry training for dancers
- the need to sustain excellent, peer endorsed choreographic and performance talent
- the importance of providing affordable accessible space for rehearsal and creation
- the low primary demand from the public for dance as an art form
- the challenge of building and sustaining touring networks, including support for presenting organizations that regularly present dance
- the problem of low remuneration for dance practitioners, and career insecurity

As the majority of the dance artists/entities and organizations have budgets well under \$500,000, their reliance on government funding is much higher than larger budget organization (43% government funding for budgets less than \$500,000 compared to 25% government funding for budgets over \$5 million. (*Finances of Performing Arts Organizations in Canada 2006-07, Hill Strategies*).

Since 2001, government funding agencies in Ontario including the Canada Council for the Arts have received substantial increases in their annual appropriations to be able to both increase grant levels and bring more dance artists on to annual operating status. This growth in funding will likely be curtailed as all levels of government focus on eliminating their deficits incurred by the recession. In fact over the next 5 years, the best case scenario would see funding levels straight lined but more likely there will be some decreases in government funding available to the sector.

There has been an effort on the part of government funders to broaden the scope of funding to support the ecology of the dance sector. Both the Canada Council for the Arts and the Ontario Arts Council have adopted a strategic perspective in developing some of their new funding programs. In particular, the Ontario Dances Program of the Ontario Arts Council, currently in its initial stage, has had a very positive effect on the multi-disciplinary presenters in Ontario to develop their knowledge of dance, strengthen their curatorial abilities and build relationships in the community to engage an audience for the art form.

The Canada Council for the Arts has also developed a funding initiative to encourage the presentation of dance, through creation-based partnerships between presenters and artists. The program aims to put resources into the hands of presenters in order to:

- enhance creation and visibility opportunities for professional Canadian dance artists and companies in Canada;
- contribute to long-term relationships between artists and presenters and their public;
- improve the conditions for creating dance by allowing artists more time in a single community, allowing them to reduce travel costs, develop in-depth relationships with a community, and focus on their work or share the intent of their work with a larger community;
- recognize the costs to presenters of providing facilities to artists;
- recognize and support the educational costs of in-depth outreach work associated with creation-based residency initiatives.

However, the demands on the government funding agencies for operational support from the numbers of emerging dance organizations as well as the increasing diversity of the art form mean that there are more dance organizations and dance artists seeking funding than ever before. The financial resources of the funders are not growing fast enough to meet the new and rapidly increasing demand.

A number of small dance organizations have also experienced the destabilizing effect of large, usually 3-year grants, to build their capacity that they are then unable to maintain as they have not been able to develop additional revenues sources to match the grant levels. Most often they have to cut the new staffing positions they have so carefully nurtured with the assistance of the grant.

Employment and Earnings:

Most of the data in this section drawn from *A Statistical Profile of Artists in Canada from the 2006 Census*, Hill Strategies Research, Inc.

- Dancers still have the lowest incomes of cultural workers, average earnings in 2005 were \$13,167.
- A significant factor for the low incomes is the lack of full-time work, dancers are employed for fewer weeks per year and there are very few companies able to provide 'full-time' contracts of 24 to 36 weeks.
- A disturbing fact from the Statistical Profile is that even before the recession the earnings of dancers had decreased by 20% between 2000 and 2005 after adjusting for inflation. For all artists the decrease in earning over the same period was 14%.
- Compared with other workers, artists face a larger drop in earnings as they age.
- The Statistical Profile is not as clear when it comes to the earnings of choreographers as they are included with Producers, Directors and

Choreographers. The average income for this group is \$43,776. This category appears to include the commercial sector as well as artistic directors of companies. The average incomes of independent choreographers are probably much lower.

- The dance sector is female dominated, 86% of dancers are female. Female artists still earn on average 28% less than the average earnings of male dancers. Female dancers earn an average of \$12,502 and male dancers an average of \$17,105.
- Artists with university credentials earn \$26,800 on average which is 53% less than the average earning of the overall labour force with the same education. In fact, artists earn less than other workers who just have a high school diploma.

A 2001 Arts Council of England report states:

Salaries, salary progression, working conditions and continuous professional development are major issues across dance. For an industry that is entirely dependent on people, the lack of regular, structural investment in its people is remarkable.

An article by Michael Kaiser, President of the John F. Kennedy Center for the Performing Arts, entitled, ***The Biggest Problem Facing the Arts*** states a similar problem about the lack of investment in arts managers:

...the central problem facing the arts today is not a lack of flute players, choreographers, actors or painters. The main challenge the arts world must address is the lack of a large, trained corps of managers who know how to find resources, attract audiences and other constituents and provide support to our artists.

Added to this problem is the fact that the current arts leaders are expressing a dangerous level of exhaustion. Many are considering leaving the field, especially in the administrative side, but the artistic leaders are also exhausted. The professional leadership of many dance organizations are “tired of struggling to create and produce quality work, find an audience and balance the budget while trying to appease their nervous boards”.

Current Context and Dance Sector Ecology:

The world economic turndown and recession have had some negative impact on the Ontario dance sector, but not as drastic as it could have been because of the cushion provided by the government arts funders. Canada’s Performing Arts Alliance issued a report in January 2010, *Taking the Pulse II: An Economic Snapshot of the Performing Arts Sector*.

- 2/3 of the performing arts organizations reported negative effects on the revenues resulting from the economic turndown – primarily in fundraising and earned revenue
- While government funding has remained stable, it does not compensate for the loss of other revenues. Organizations are responding to the challenges by reducing staff, freezing salaries, have reduced or plan to reduce the number of performances as well as the number of productions or programs.
- 31% of dance organizations were forecasting deficits at their fiscal year-end
- 25% of dance organizations were planning to reduce the number of artistic and technical staff and 44% will cut back on productions and programs including touring
- Some organizations are employing other strategies to respond to the new economic reality – more use of technology, social networking, increased levels of collaboration and sharing services and resources with other organizations.

Audiences for dance:

- Attendance reported by dance companies has fluctuated between 700,000 and 1.8 million over the three decades, being at its lowest in the late 1970s and peaking in 1988. In general, it has been in the area of 1.0 to 1.3 million and was 1.2 million for 2000 after showing steady growth through the 1990s (from 1.1 million to 1.5 million in 1998). Meanwhile, attendance for live theatre increased from 3 million to 9 million over the thirty year period.
- In the face of an aging population, which should mean fewer dancers and increasing audiences, the data imply that there are in fact (i) more dancers and more dance companies, but (ii) relatively smaller audiences - although recent data suggest the dance audience is again growing. Dance is growing, yet struggling.

Thus, there has been growth over 30 years, but

- **audiences for established professional companies have seen little substantial growth**
- the growth among dance organizations does not match that for theatre
- an increasing recognition of the variety of dance forms is changing the way the public sees 'dance' and data is unavailable on a wide range of dance activity, which limits the capacity to manage the sector

From: *The Growth of Dance in Canada Over Three Decades*

(Prepared for the Canada Council for the Arts, April 2004, T.J. Cheney Research Inc.)

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Joining up the dots: Dance agencies – thoughts on future direction. Janet Archer, Arts Council of England 2010

Performing Arts Attendance in Canada & the Provinces 2003. Hill Strategies Research, Inc.

Performing Arts Survey 1998-2003. Statistics Canada

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The Growth of Dance in Canada Over Three Decades. Prepared for the Canada Council for the Arts, April 2004, T.J. Cheney Research Inc.

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PART 2

ONTARIO DANCE SECTOR SURVEY RESULTS

The needs assessment survey of the memberships of CADA-ON and DanceOntario was undertaken to:

- Determine the importance and relevance of the current services offered by CADA-ON and DanceOntario to their respective memberships.
- Establish the key issues and emerging needs for individual dance artists and organizations
- Establish the key issues and challenges facing the Ontario dance community
- Ascertain what new services may be required
- Findings from needs assessment survey will form the basis for a Trillium Foundation application for Phase 2 of the study in order for CADA-ON and Dance Ontario to develop a business model to better respond to the needs of their memberships.

Overall, the survey was completed by 77 respondents from both organizations. However, the respondents did not always answer every question.

Data drawn from the completed surveys demonstrates the following:

For both CADA-ON and DanceOntario the members responding to the survey indicated a high level of satisfaction with the services offered.

For CADA-ON members:

3 **most** important services are:

1. Training subsidy program
2. Professional standard for dance
3. Membership ID providing access to professional discounts

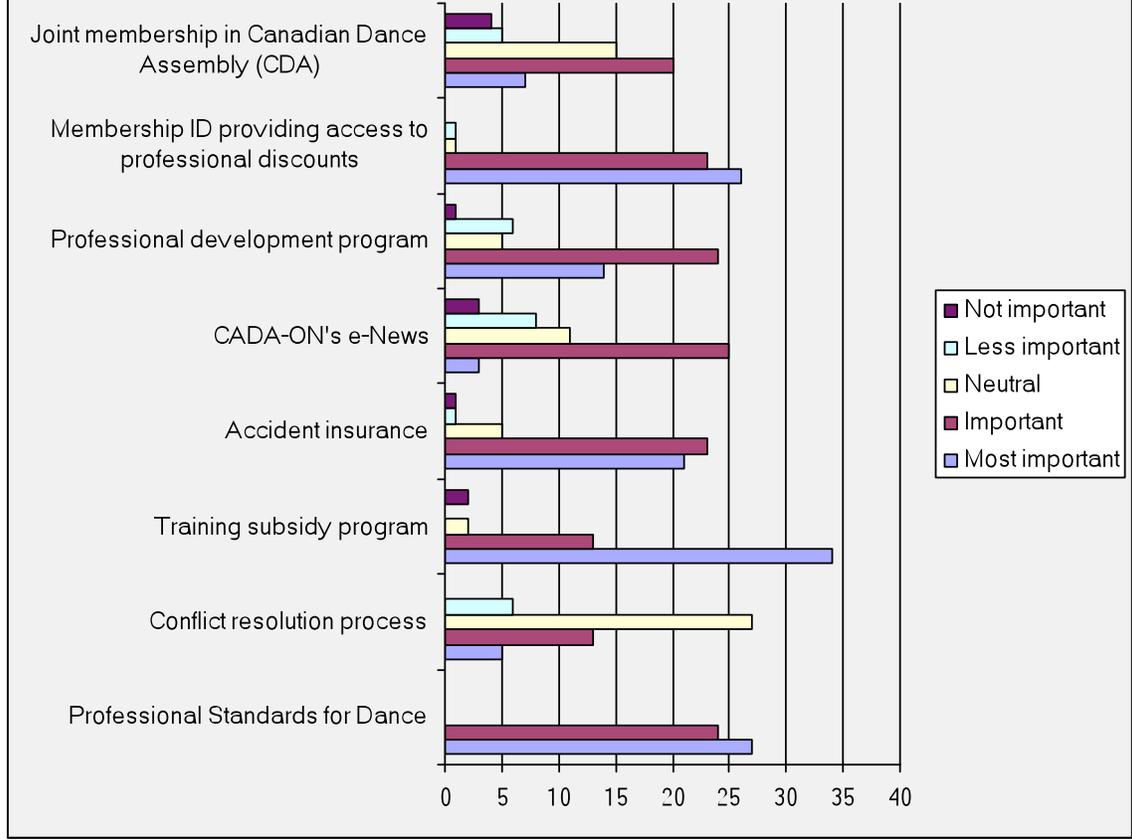
3 important services are:

1. CADA-ON e-news
2. Professional development program
3. Accident insurance

Usage of CADA-ON services:

94.3% of respondents have used CADA-ON services in the past year.

FOR CADA-ON MEMBERS ONLY (Dance Ontario Members - skip to Question 7. If you are members of both organizations please complete Questions 4-9.) How important to you are the following services offered by CADA-ON?



For DanceOntario members:

3 most important services:

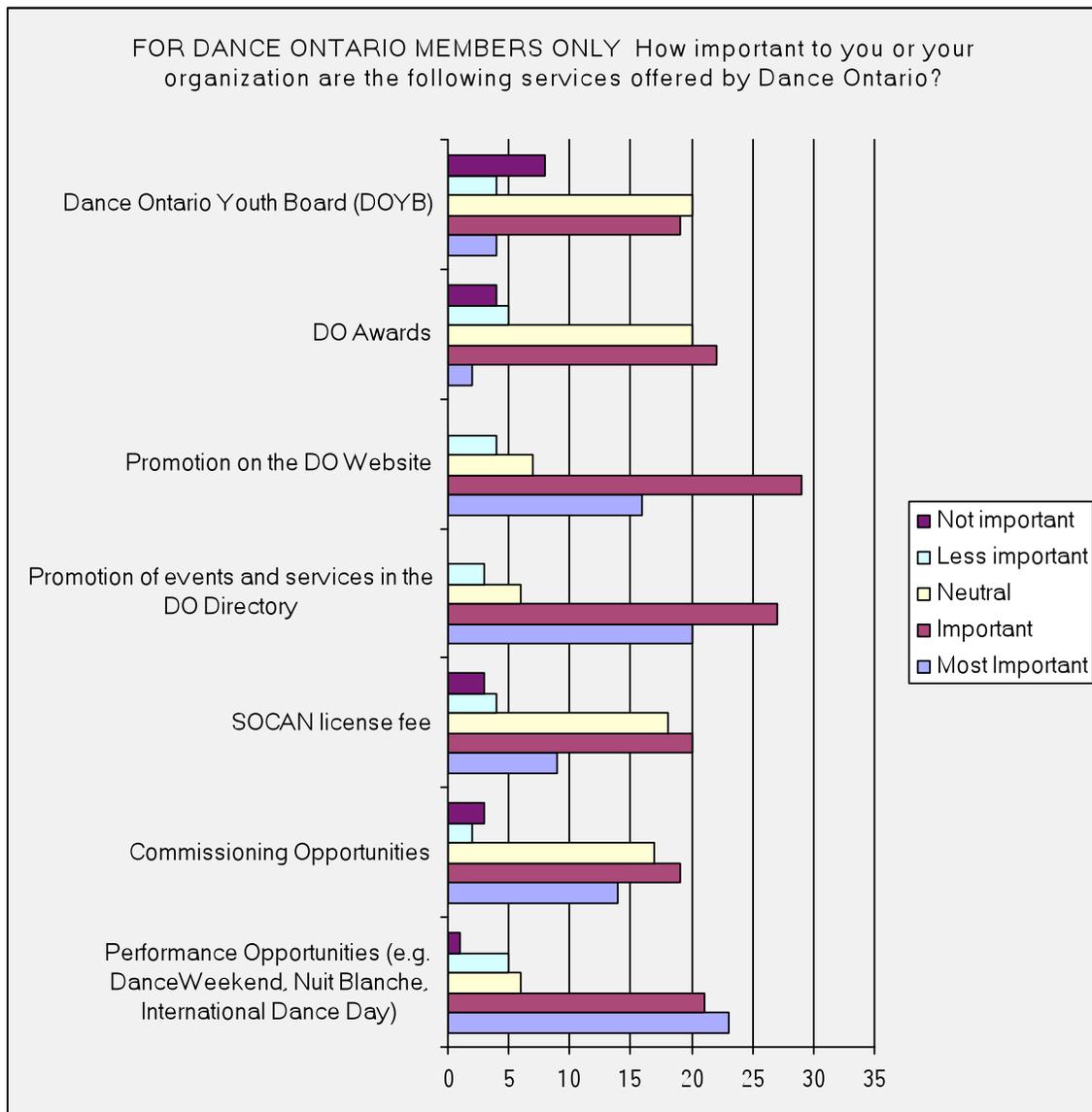
1. Performance opportunities: DanceWeekend, Nuit Blanche, International Dance Day
2. Promotion of events and services in the DO Directory
3. Promotion on the DO website

3 important services

1. Commissioning opportunities
2. SOCAN license fee
3. DO awards

Usage of DanceOntario services:

77% of Dance Ontario respondents have used the services in the past year.



The value of dance service organizations to members:

71.2% of respondents believed that dance service organizations are vital to the well being of dance artists/organizations in Ontario.

The 3 most pressing issues or challenges facing dance artists or dance organizations:

2 major issues emerged from the responses:

1. **Lack of adequate funding and lack of 2 key resources – space and administrators**
2. **Lack of performance opportunities – lack of work**

1 other frequent response

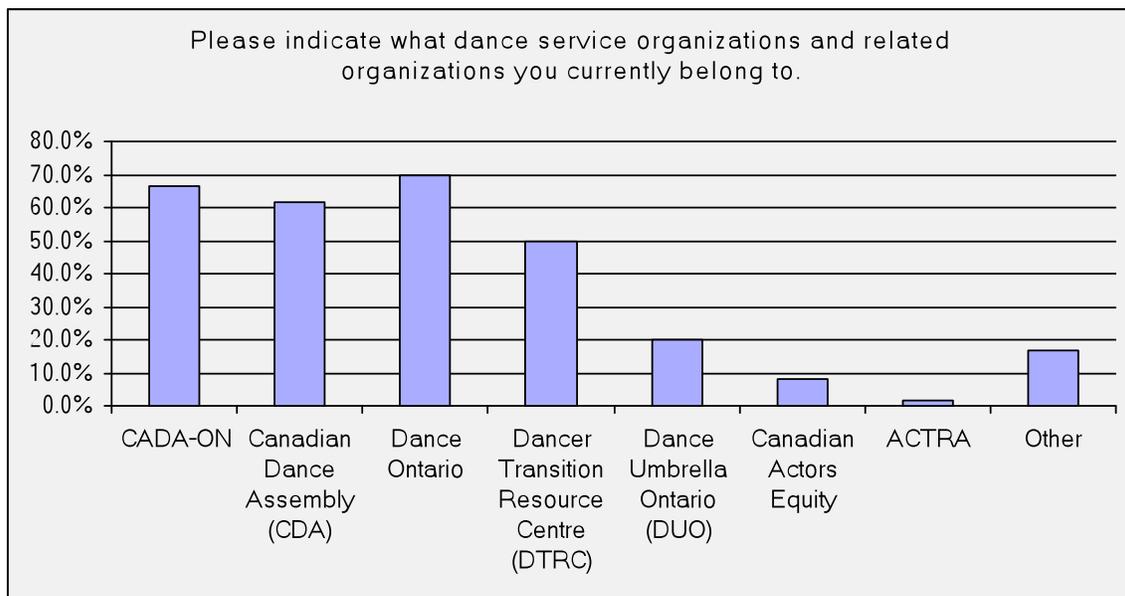
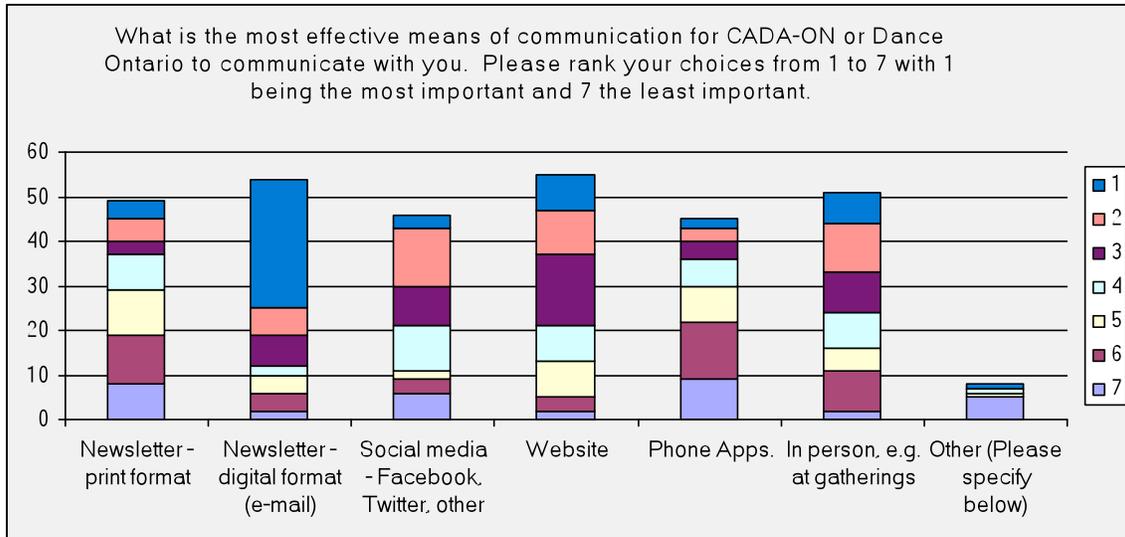
- **Lack of a sense of community in the dance sector**

The 3 most pressing issues/challenges facing the dance community:

1. **Lack of funding**
2. **Small audience for many dance forms**
3. **Lack of public interest and knowledge about dance as an art form**

New or different services to address the issues or challenges facing dance artists/organizations and the dance community:

1. Advocacy – stronger relationship to national and municipal service organizations to strengthen the field
2. More opportunities for networking, building collaboration and stronger sense of community in the dance sector
3. New models for administrative support
4. Audience development initiatives
5. Longer term: a dance centre or hub



Benefit of belonging to 3 or more dance service organizations:

Strong support for having a number of dance service organizations – no suggestion for merging organizations or services:

- It connects me to my community.
- Networking - relationships
- It is important for me to show my support of the unique mandates of each of these organizations.

If you could send one important message to CADA-ON or DanceOntario as they undertake this study, what would it be?

The responses indicated strong, positive support for the work of both organizations, desire for communication, networking, and new strategies and new ways of thinking.

- Communicate with us, continue to ask us what is important.
- Find a way to preserve the key services of each organization.
- We need to address what the reality of our situation is – to move forward and change our thinking to address what is now as opposed to what used to be.
- Working together is crucial – need a strong sense of community.
- The work you do is vital for the dance community.
- Please hurry, there is a new generation of dance artists that are not able to access a career because of the current climate at the moment.

Profile of respondents:

Location:

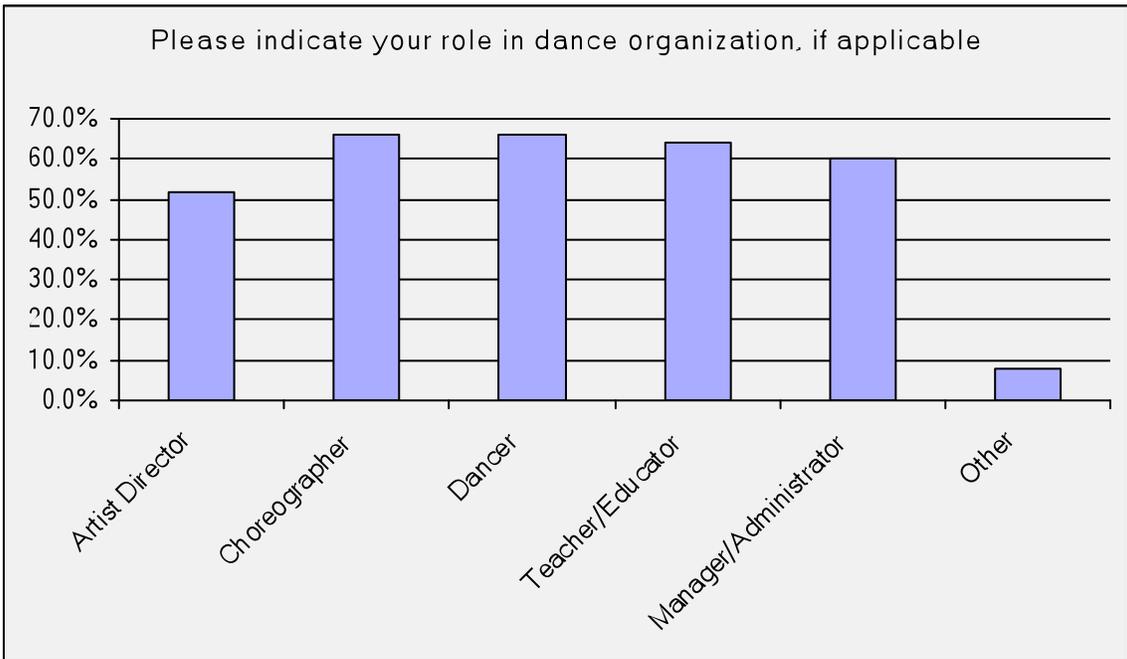
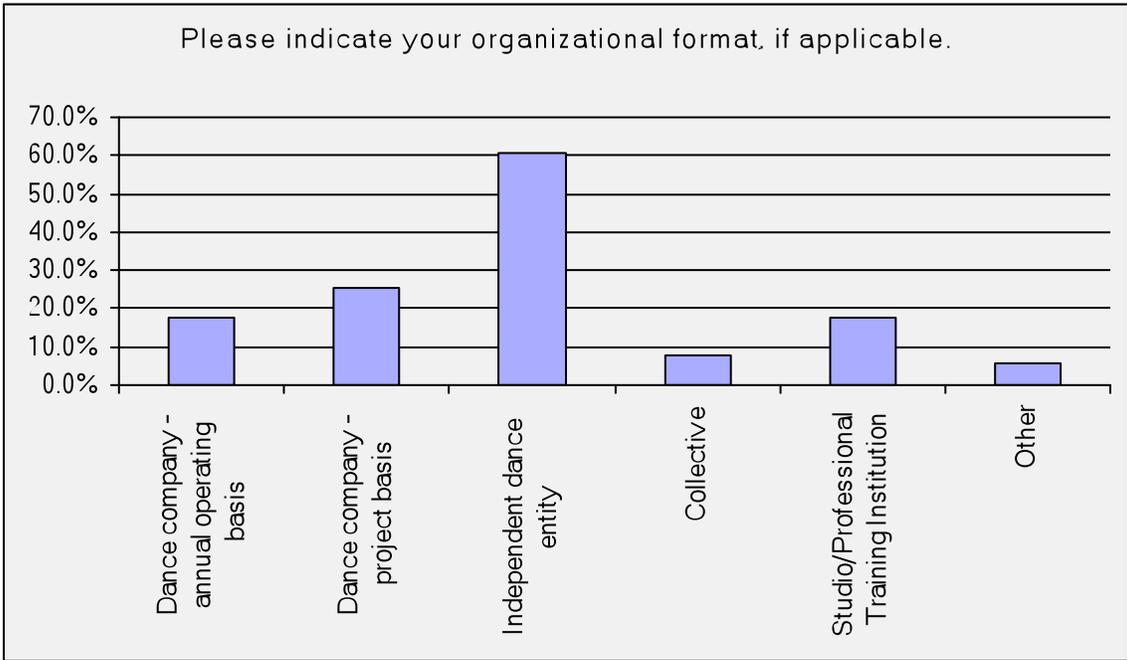
Toronto	84.5%
South Central	3.4%
Central	5.2%
Southwest	3.4%
East	1.7%
Northwest	1.7%
Far North	0

Age:

21-25	6.8%
26-35	39.0%
36-45	27.1%
Over 45	27.1%

Gender:

Female	81%
Male	19%



Please indicate the dance genre(s) you practice

Dance Genre	Number
Contemporary	33
Contemporary & inter-arts movement art performance	1
Modern/contemporary	2
Traditional & contemporary Asian	1
Contemp., jazz, ballet, afro-caribbean, tap	1
Contemporary & African Diaspora	2
Contemporary South Asian	1
Hip hop/House	3
Tap, jazz, contemporary, salsa, bollywood, folk, ballroom (teaching)	4
Flamenco	1
Ballet	1
Body conditioning, pilates, dance rehabilitation, ballet	1
Post modern	1

PART 3

CONSULTANT'S OBSERVATIONS AND RECOMMENDATIONS

Comparing the results of the environmental scan and reading the results from the needs assessment survey, several key issues emerged:

1. There needs to be a more rigorous approach to establishing statistical information on the dance sector in Ontario. A number of the reports gathered for the environmental scan had conflicting information, especially around the actual size of audiences for dance and whether they were growing or not. If a national Mapping Project of the Canadian dance sector is undertaken, it could be a very important opportunity to address the need for accurate and pertinent information on the current state of the dance sector. It will need to be available both on a national and regional basis.
2. The dance sector in Ontario continues to struggle with insufficient resources, undercapitalization and low primary demand from the general public.
3. The strategies and approaches to the problems confronting the dance sector that have been employed to date are very obviously not working to improve the health of the sector.
4. The dance sector in Ontario appears to be in a dispirited state. Most of the respondents replied to the issues facing the dance community as well as those facing dance artists or organizations from the perspective of scarcity. This was revealed by the preponderance of comments (75%) indicating a lack of something...lack of resources, lack of opportunities, lack of audience, lack of administrators, lack of income, lack of time, etc.
5. I believe that it is imperative that the dance sector starts to examine itself from an entirely different perspective. A paradigm shift to moving from a mental model that focuses on scarcity and what isn't working to examining the issues through a complexity lens – what is working, abundance/what you do have - creativity, and relationships.
6. I cannot state too strongly that just doing more of the same, in linear steps will not solve the issues or challenges facing the sector. Nor is the problem just a lack of money. Many of the issues can be addressed in a variety of ways if the sector can come together to examine how they can develop a culture of shared resources. In the past there have been examples of strategic alliances and shared revenue development initiatives that have been successful. The Creative Trust: Working Capital for the Arts is an example of a strategy coming from the performing arts community to develop new revenues through a collaborative venture that would not ordinarily have been available to any one organization.

I think that the dance sector in Ontario is currently in the same place that England's dance sector was in 1989 when *Stepping Forward*, a seminal report on dance was published by the Arts Council of England. It informed the development of the dance sector in England throughout the 1990s and continues to provide the foundation for current dance infrastructure. In setting the scene, the Report's author, Graham Devlin referred to:

a deeply demoralized and nervous profession. The concerns thus articulated resonate through every scale and almost every style of work – the belief that there is a creative crisis in British dance, for example, or that much contemporary work has lost contact with its audience

Faced with a daunting range of problems, Devlin encouraged a broad-ranging approach to development of the sector, from education and training, through support for new work, to touring and other distribution. Among other things, the report recommended:

1. the establishment of a network of national dance agencies - nine of which were established and continue to operate
2. that the Dance Panel of the Arts Council of England adopt a more strategic role that stronger emphasis be placed on an audience rather than artist-centred approach to resource allocation
3. that additional resources be secured to fund companies more appropriately; and in the absence of this, that one or two companies be defunded to fund the remaining companies more generously that substantial funding be provided to a Black Dance company (i.e. African dance)
4. that non-Western dance be nurtured through the proposed regional dance agencies, and through dance training providers
5. that dialogue with the Dept of Education should be advanced 'to clarify the parameters of educational policy from both sides'

Much of the Report was adopted and implemented, and the sector is now undeniably stronger, healthier and, in audience terms more popular, than it was 15 years ago. A glance at the dance infrastructure in London alone gives a hint at what has been achieved.

In London, there are now:

- more than thirty venues regularly presenting dance
- four ballet companies, 39 contemporary dance companies (at all levels of operation), six South Asian dance companies, seven African dance companies, 16 physical theatre companies, and seven student dance companies
- 16 organizations offering studio/rehearsal space
- 13 dance management organizations
- 31 organizations offering support or advice to the dance sector

There are now a total of 24 national, regional and county dance agencies. Each varies in the precise range of services, but typically they provide support resources for professional dancers, present regular workshops for the community, run projects linking into the education system and, in some cases, develop and present professional performances.

The above information is from the publication, "A Window on Dance" an extensive mapping research project undertaken by the Arts Council of England and available on the Council of England's website.

It is clear from the Ontario Dance Sector Survey that the memberships of CADA-ON and Dance Ontario have a strong commitment to both these dance service organizations. With that support, these organizations can play an important role in galvanizing the Ontario dance community to come together to envision their way forward to a healthier and revitalized future.