ARTS BUILD ONTARIO

Pulse Check Survey Summary

May 2024

In April 2024, ABO conducted a survey to understand the current state of cultural spaces for small to medium sized organizations in Ontario. Results from 52 participants provided us with valuable insights into the current needs of organizations and their spaces.

The majority of participants responded from the GTA, with Theatre being the most common discipline (51%), followed closely by Community Arts (48%).

Pulse Check Survey Highlights

Non-profit organizations are facing significant challenges as funding for the sector decreases. The increasing cost of space, current operating budgets, and programming models are all contributing factors to the precarious future for arts organizations.

- Fifty percent of respondents indicated they lease their spaces, while 27% own their space
- The operating budget of most organizations falls between $250,000 - $499,999 (21% of responses)
- Fifty-four percent of organizations are back to fully in-person, while 41% are mostly in-person with some online elements

How are organizations using digital tools?

Cultural venues experienced a wave of digital transformation over the past three years. However, most protocols implemented during COVID-19 are no longer in use. Only a few organizations have masking policies in place or have continued to implement enhanced safety measures. Digital programming is still offered, but the investment in digital components compared to in-person programming has significantly decreased. The most common change that has remained from the pandemic is hybrid work models for administrative staff.

What does staffing look like for arts organizations in 2024?

Based on the survey results, organizations are hiring for new roles and working to rebuild their staff capacity. Several organizations indicated that they have had some turnover and staffing decreases. However, the majority of organizations are creating new positions and expanding operations. Many organizations have undergone capital projects to enhance their facilities or are currently awaiting funding to complete their renovation projects.

What does the sector need when it comes to space?

The survey found that arts organizations desire more dialogue with funders from all levels, as well as education and training around shared space partnerships. Space partnerships are becoming an emerging model necessary for the arts sector to continue moving forward. Sixty-four percent of respondents indicated their top priority in the near future is securing funding for space, followed closely by marketing and generating earned revenue. Organizations are continuing to rebuild and expand, however it is clear that there is a growing crisis when it comes to increased access to designated facilities and creative spaces.

Public space is more and more contested as the population density increases, yet there has been little or no expansion of spaces or even planning for the increased density that acknowledges this change.
-Survey participant

Key Findings

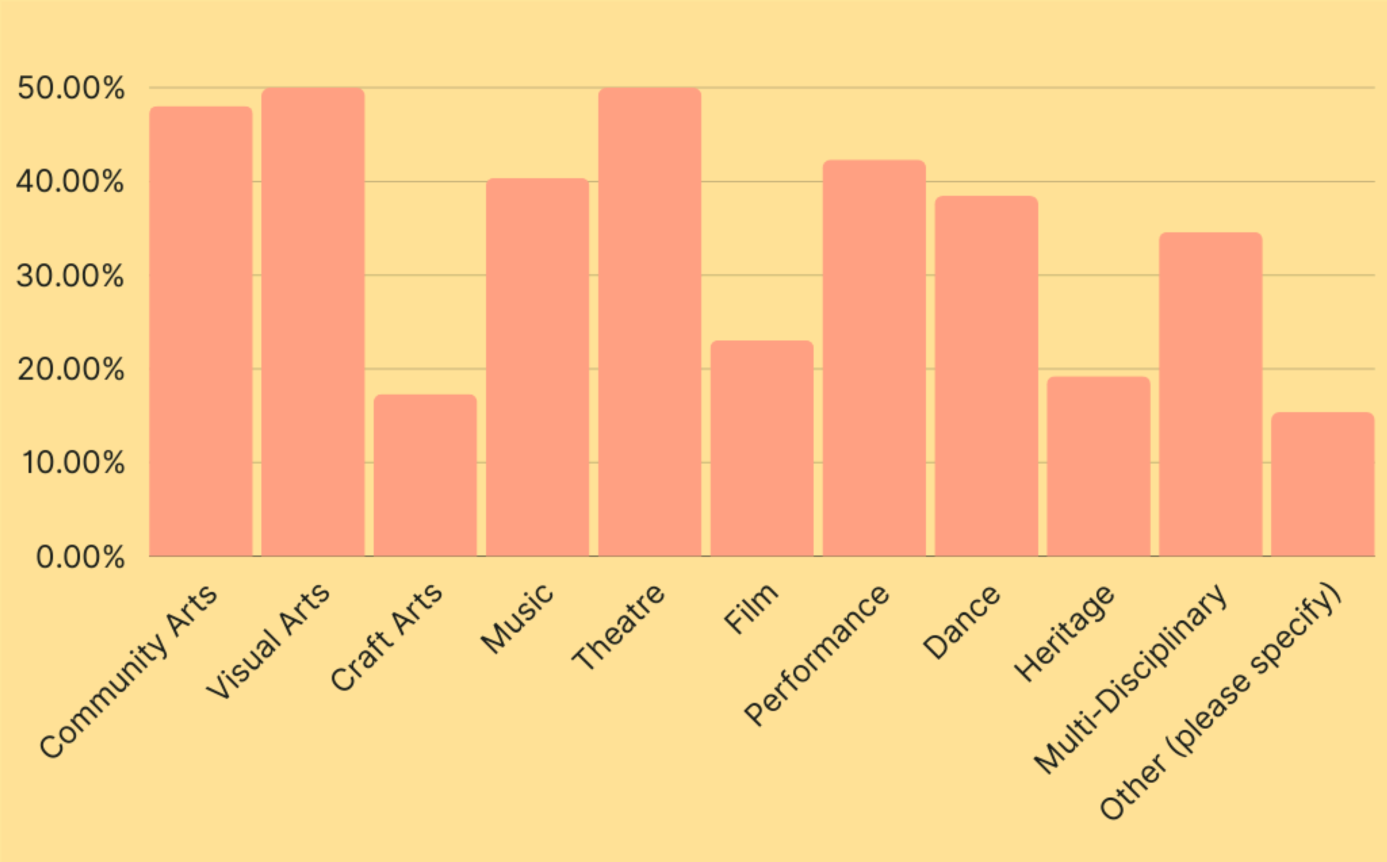
The need for innovative, affordable, and collaborative models for operating space was a central theme. In the next five years, the top areas that need to be addressed include:

- Increased access to core operating funding for facilities
- Government or private sector funding for infrastructure projects
- Fostering collaborative space partnerships

The most significant concept that emerged from this survey is the need for **shared space partnerships** and **access to funding.** Cross-sector partnerships and resource sharing are also needed for organizations to continue to grow, especially with rising real estate costs and rapid development across Ontario communities.

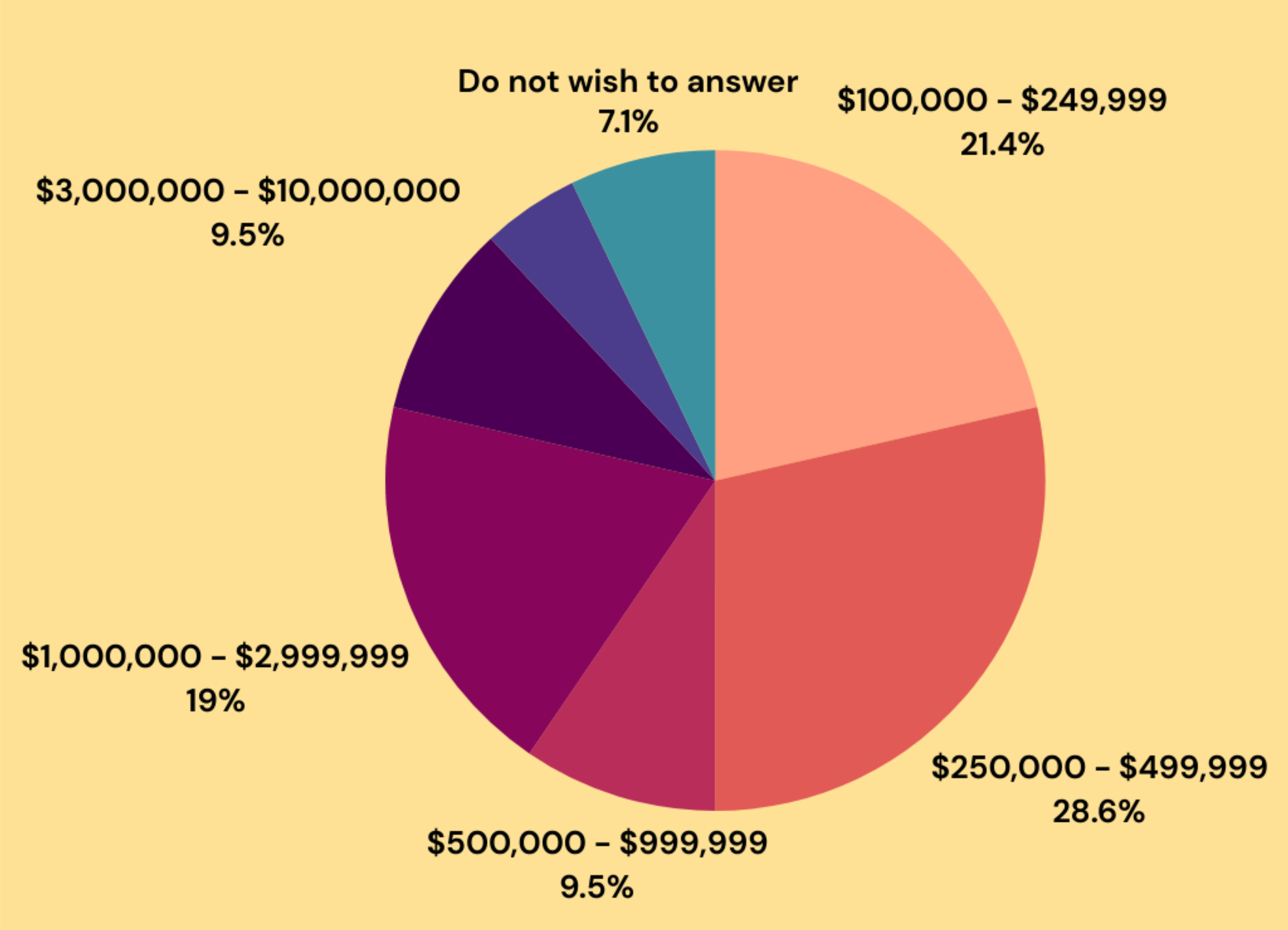
Survey Results

Arts disciplines of respondents



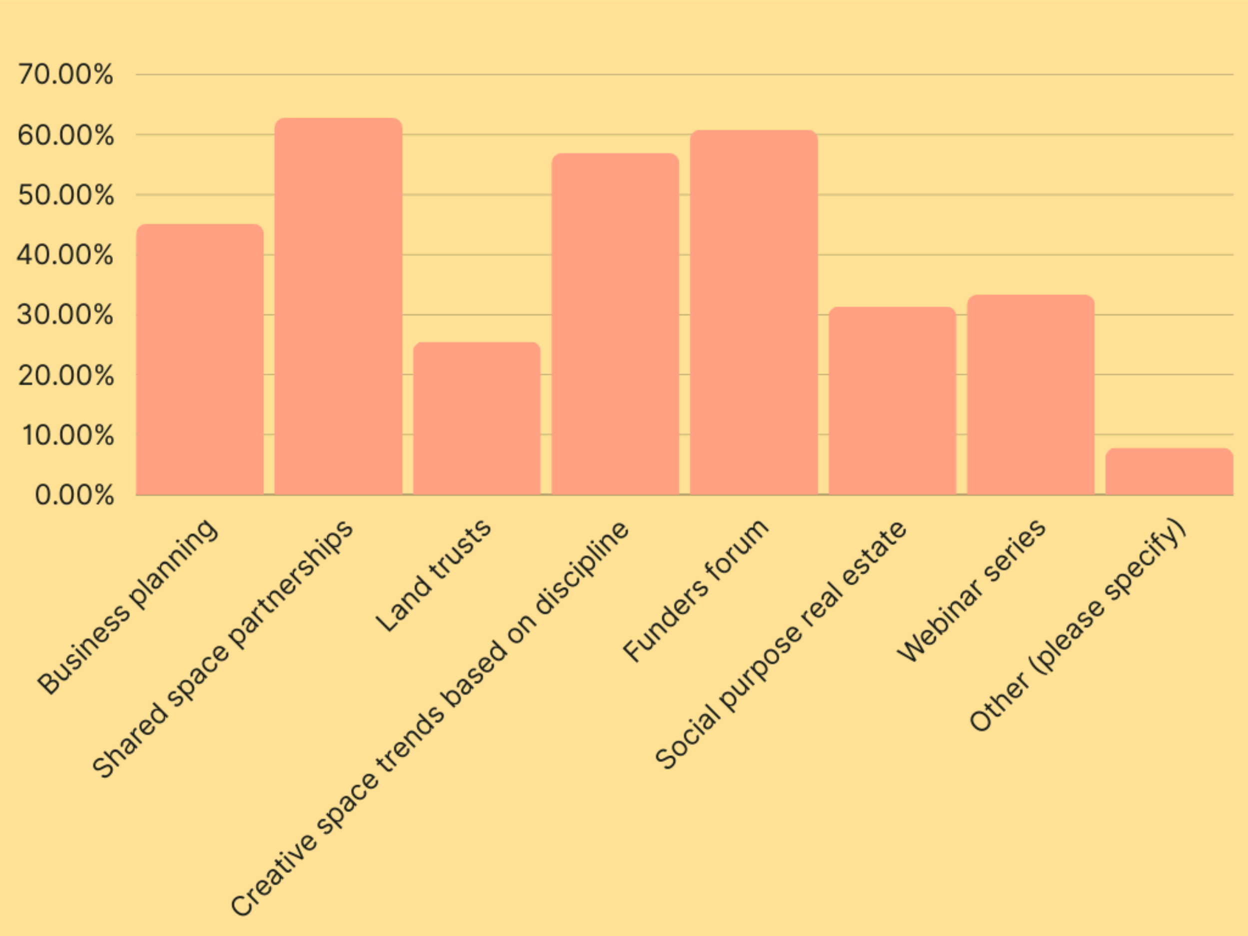
The most common discipline represented by respondents were from theatre organizations. Those who identified as “other” include arts service organizations, circus arts, culinary, spoken word, banquet/meeting space, puppetry, and architecture.

Annual operating budget for 2023-24



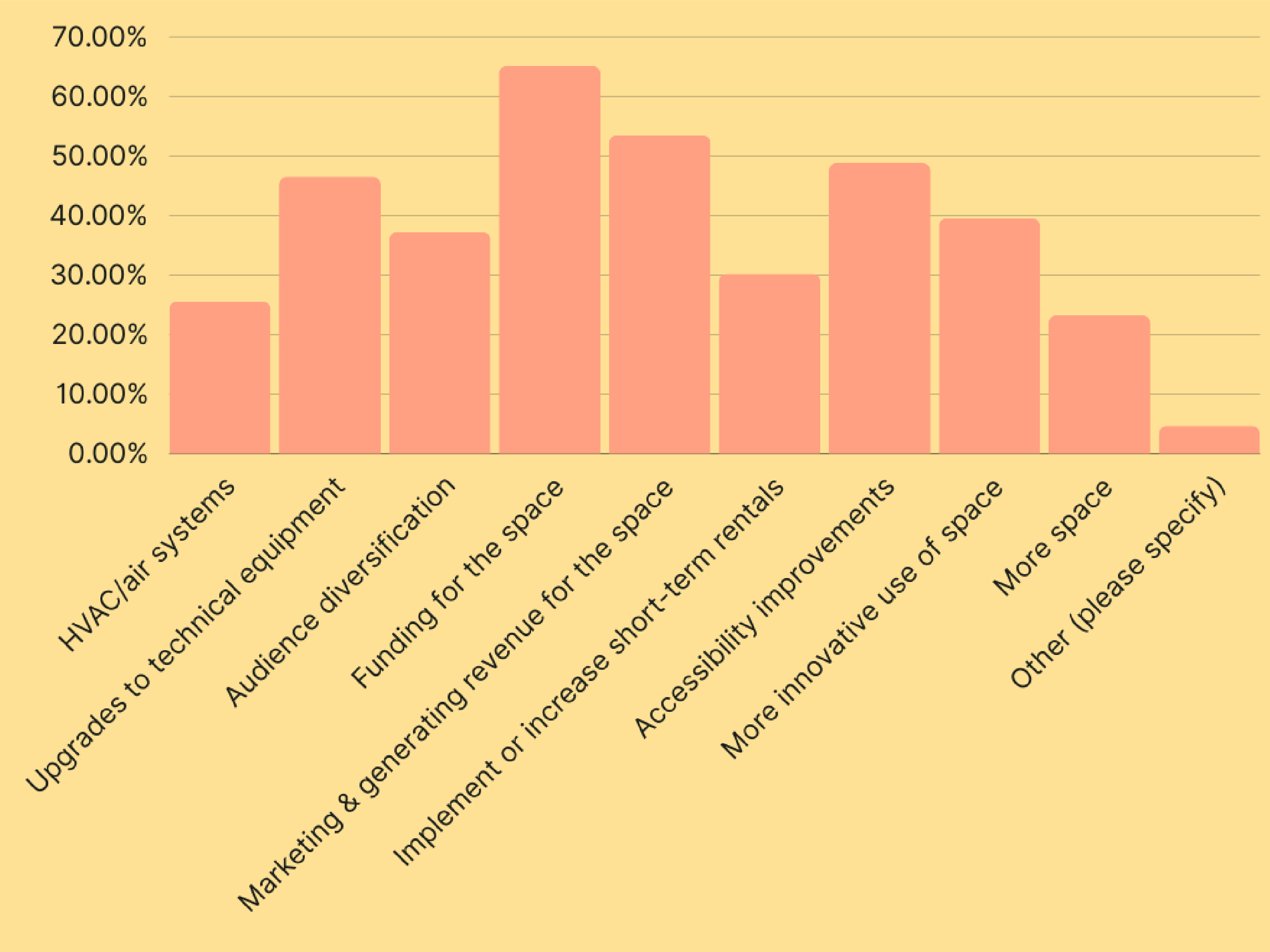
The most common operating budget range was between $250,000 and $499,999 (28.6% of respondents). The second was between $0 and $99,000 (19% of respondents). This indicates that these organizations may have a smaller staff pool or utilize a volunteer network to run their programs.

Capacity-building resources needed to support arts organizations and their arts spaces



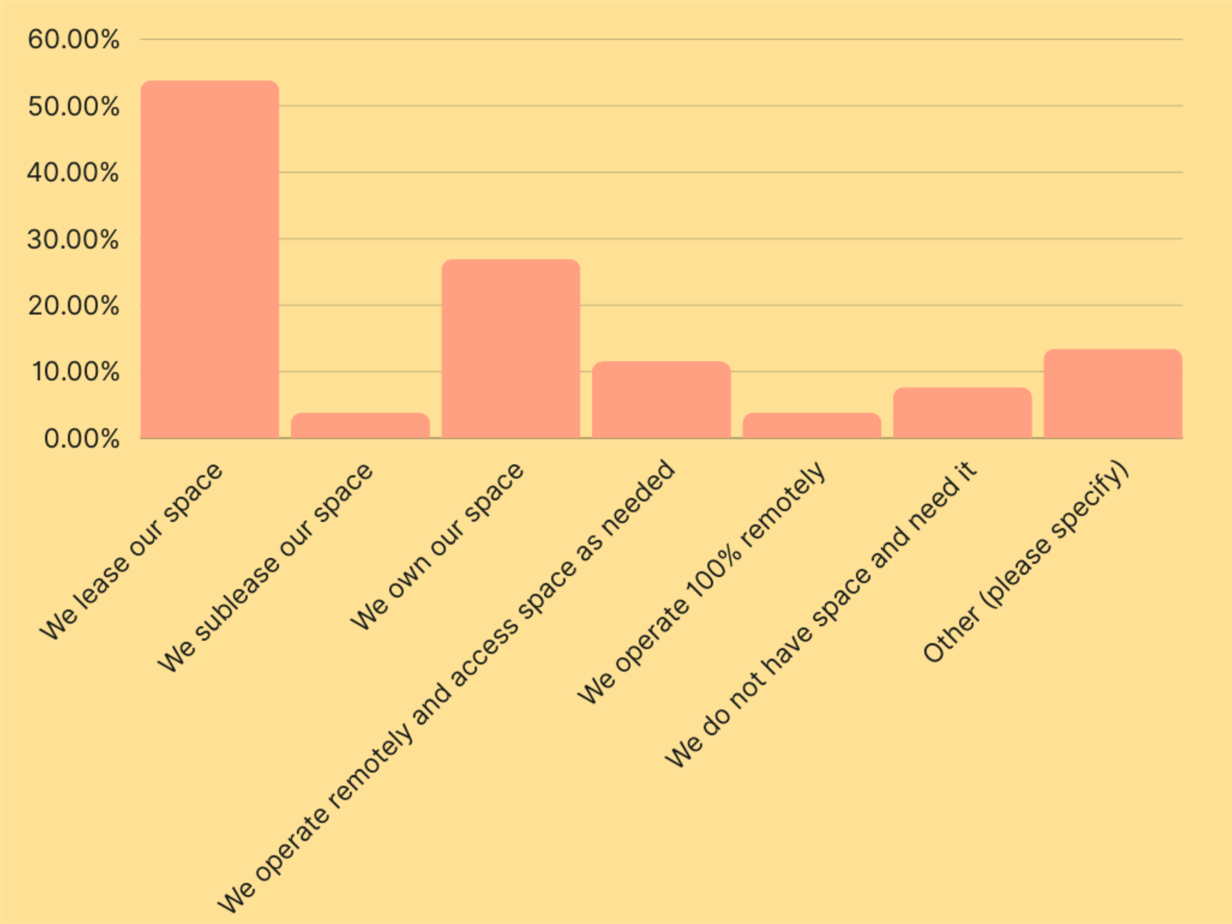
Creating resources on shared space partnerships, and creating opportunities to attend funder forums were the top two areas respondents were most interested in. These topics were closely followed by more training around creative space trends based on discipline, business planning, and social purpose real estate. Topics identified as “other" include funding accessibility, technology / AI in operations, and landlord/tenant relationships.

Top priorities for Ontario’s small-medium sized creative spaces



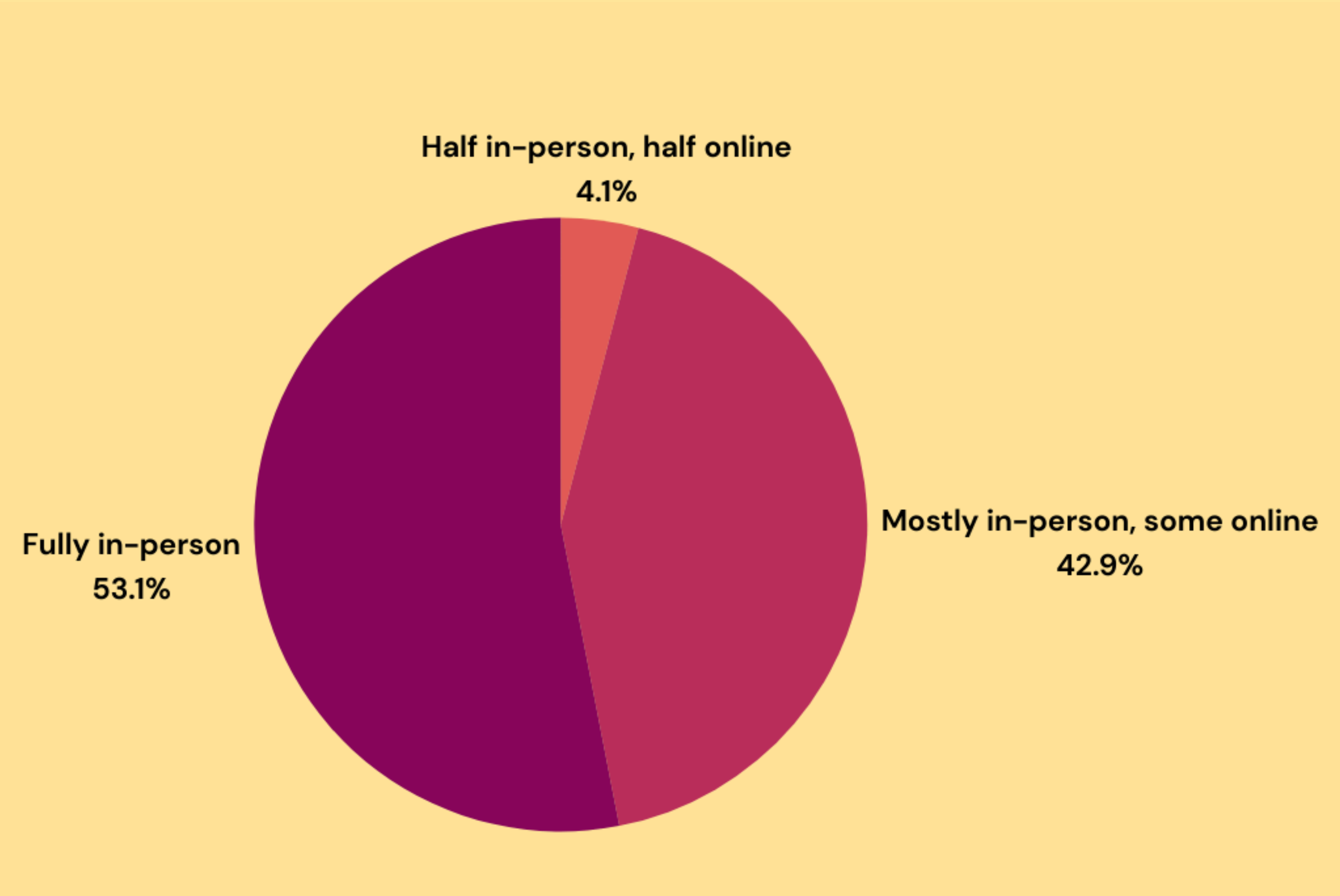
For those who occupy and manage spaces, securing funding for the facility is the number one priority. More space is ranked as the lowest need, indicating that more resources are needed to support audience development and the state of repair in existing facilities. Other priorities include funding for educational programming and finding temporary space during upcoming building projects.

Status of space occupancy and ownership



The majority of respondents (54%) lease their space, indicating the majority of small to medium sized arts organizations do not own their facilities. This could confirm a trend towards arts organizations occupying temporary spaces through long-term leases, short-term leases and or meanwhile space models. Twenty-seven percent of respondents indicated that they own their space, which may increase liability on facility upkeep. Lastly, 14% selected “Other” which includes leasing office space and renting studio space, independent ownership, leasing the land, working in municipally owned space operated by a non-profit, renting community space events/programs and space used through in-kind donation.

Ratio of in-person to virtual events



Organizations have moved back to either fully in person or mostly in person events. Only 4% of respondents identified events were half in person, half online and 0% of respondents deliver programs mostly or fully online.