



Facility Needs Assessment Survey

ArtsBuild Ontario

Final Overview Report: Prepared by Ipsos Reid

October 2006



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Background and Research Objectives

- ArtsBuild Ontario, in partnership with a number of key funders, sought to conduct a needs assessment survey among small and mid-sized arts organizations in Ontario.
- The survey was intended to provide an up-to-date and comprehensive report on the number and the state of art facilities and the related facility needs of small and mid-sized arts organizations in Ontario.
- The research was designed to obtain the following key information:
 - Facility usage and requirements of Ontario's small and mid-sized arts organizations
 - Ownership structure of existing facilities;
 - Age and life-cycle upgrades / replacement requirements and timelines of existing facilities; and
 - Gaps in the existing cultural infrastructure inventory (geographically and by discipline, current and projected).



ArtsBuild Ontario is a collaborative project being driven by eight arts service organizations including:

Artist-Run Centres and Collectives of Ontario

Dance Umbrella of Ontario

Galerie du Nouvel-Ontario in collaboration with Association des groupes en arts visuels francophones.

Ontario Association of Art Galleries

Professional Association of Canadian Theatres

Théâtre Action in collaboration with Association des théâtre français du Canada

Theatre Ontario

Toronto Alliance for the Performing Arts

ArtsBuild Ontario is grateful to the Department of Canadian Heritage, Ontario Arts Council, Ontario Ministry of Culture and the Ontario Trillium Foundation for financially underwriting this survey.



Methodology

- The following report is based on a survey conducted by Ipsos Reid on behalf of ArtsBuild Ontario among small and mid-sized arts organizations in the province. For the purposes of the survey, “small” and “mid-sized” are defined as organizations with annual operating budgets of less than \$3 million.
- A total of 383 of these organizations were invited and eligible to participate in an online survey designed to measure the number and state of arts facilities and related facility needs of small and mid-sized arts organizations in Ontario.
- Follow up phone calls were made by both Ipsos Reid and ArtsBuild to ensure respondents had received the survey and to encourage participation. The script used by ArtsBuild was reviewed by Ipsos Reid.
- A total of 164 arts organizations participated in the survey (157 English and 7 French). Participating organizations are broken down by discipline, geography and language on the following page.
- The margin of error for the overall survey results, based on a universe of 383 such arts organization, is +/-5.8%, 19 times out of 20. The margin of error will be larger for sub-groups of the surveyed population.
- The sample size and associated margin of error are sufficient to represent the wider population of such organizations through quantitative analysis.
- The overall response rate for the study is 42.8%, which is higher than average for studies of this kind.
- The survey was fielded between July 21 and September 13, 2006.



Methodology

- Where sample sizes are large enough, results have been shown by discipline or other subgroups.
- Organizations from eight arts disciplines were included:
 - 1) Professional Theatre, 2) Dance, 3) Music, 4) Visual and Media Arts, 5) Community Theatre, 6) Dissemination, 7) Multi-disciplinary and 8) Literature organizations.
- For reporting purposes, arts organizations were collapsed into 5 disciplines.¹
- The survey was provided in both official languages.

	Number of completed surveys
All organizations surveyed	164
BY DISCIPLINE	
- Theatre	47
- Dance	20
- Music	18
- Visual / Media Arts	56
- Community Theatre	9
- Dissemination	4
- Multi-disciplinary	9
- Literature	1
BY REGION within ONTARIO	
- Toronto	77
- GTA (eg. Mississauga, Oshawa)	10
- Central (eg. Kitchener, Peterborough)	38
- Southwest (eg. Windsor)	7
- East (eg. Ottawa, Kingston)	21
- North (eg. Sudbury)	11
BY LANGUAGE	
- English	157
-French	7

¹ Community Theatre, Dissemination, Literature and Multi-disciplinary responses were analyzed together under the category of “other” as the sample sizes individually were too small for analysis.



Key Figures

The following are cumulative totals based on self-reported responses of the 164 organizations surveyed. Caution should be taken when interpreting these totals. The totals shown do not reflect, nor should they be extrapolated to, the whole population. They represent only the 164 organizations who completed the survey.

■ Total number of **planned** capital projects: 184 (45 with professional quotes attached, 136 with estimated costs, 3 no costs considered yet)

- Total number of capital projects to be completed **in less than 3 years**: 109
- Total number of projects to be completed **within 3 to 5 years**: 38
- Total number of capital projects to be completed **within 5 to 10 years** : 22
- Total number of capital projects for which **completion date has not been determined**: 15

■ Total number of **facilities reportedly used in 2004/2005**: 485. See slide 27 for detailed information.

- Total number of owned facilities: 37
- Total number of leased facilities: 94
- Total number of rented facilities: 149



Key Figures

The following are cumulative totals based on self-reported responses of the 164 organizations surveyed. Caution should be taken when interpreting these totals. The totals shown do not reflect, nor should they be extrapolated to, the whole population. They represent only the 164 organizations who completed the survey.

- Total **number** of organizations reported to have a capital reserve fund: 26
- Total **amount** of capital reserve funds: \$3.5 million.
- Total **revenues** 2004-2005: \$32.5 million (half reported \$214,936 or less)
- Total **number** of public activities / events in 2004-2005: 17,108 (half reported 35 or fewer)
- Total **attendance** for public activities / events in 2004-2005: 750,018 (half reported 4,350 or fewer)
- Total number of **expected capital expenditures** (eg. new building construction, acquisition of building or land, building renovations, upgrades or major repairs, systems upgrades such as electrical, HVAC, safety etc. or specialized technical equipment such as lighting and sound or dance floor etc.) within the next ten years: 348
- Total value of planned capital projects **in the next three years** based on professional quotes and estimated costs: \$20 million (\$4 million from professional quotes and \$16 million in estimated costs).
- Total value of planned capital projects **in the next 10 years** based on professional quotes and estimated costs: \$104 million (\$5.8 million professional quotes and \$98.2 million estimated).



Executive Summary

The following presents the key findings from the survey.

Capital Project Requirements

- Over half (59%) of planned projects in all categories are expected to be completed within the next 3 years. This amounts to 109 projects. Three-quarters (75%) of arts organizations expect to require at least one capital expenditure within the next 10 years.
- Of those, 72% are currently planning at least one capital project. Building renovations and specialized technical equipment expenditures comprise most planned projects.
- The total cumulative amount of currently planned capital projects as reported by organizations surveyed is just over \$104 million².
- Six in ten (58%) organizations are planning a specialized technical equipment expenditure including lighting, sound, dance floor and 52% are planning a building renovation, upgrade or major repair. Nearly as many (45%) are planning systems upgrades, such as electrical, HVAC or safety upgrades. Fewer organizations are planning for acquisition of building or land (32%) or new building construction (25%)
- 97% of organizations planning a project indicated they would be very likely to apply for a capital grants program geared to the needs of small and mid-sized arts organizations if such a program existed.

Gaps in Existing Cultural Infrastructure

- Seven in ten (69%) of the organizations surveyed report insufficient access to at least one type of required facility. There is a lack of access to facilities to meet the current needs of small and mid-sized arts organizations.
- Storage and service area facilities are in greatest need. Half (45%) of organizations report a lack of access to storage and service area facilities. One-third report a lack of rehearsal / production facilities (39%) and the same proportion lack public presentation facilities (34%).

² Based on projects organizations are currently planning. Includes projects for new building construction, acquisition of building or land, building renovations, systems upgrades or specialized technical equipment. Includes projects where cost is either quoted by a professional or estimates by organization. This represents the cumulative total of self-reported figures by organizations surveyed. Respondents were permitted to provide costs based on either a professional quote or estimate for up to 3 projects.



Executive Summary

Age and life-cycle upgrades/replacement requirements and timelines of existing facilities

- Nearly half (45%) of the facilities owned and leased by small to mid-sized arts organizations are 75 years of age or older.
- In 2004-2005 organizations spent a cumulative total of \$2.2 million on repairs and upkeep for owned facilities.
- Two in ten (16%) organizations report having a capital reserve fund. None of the dance or music organizations surveyed indicate having a capital reserve fund. The cumulative total amount of capital reserves is \$ 3.5 million. Half have \$73,789 or less in their capital reserve fund.
- Respondents most frequently indicate using their operating budget, fundraising, Ontario Trillium Foundation grants or municipal grants for capital expenditures made within the last 5 years.

Organization profile data

- In 2004/2005, the 164 organizations surveyed reportedly used a total of 485 facilities. See slide 27 for detailed information.
- Total number of owned facilities: 37
- Total number of leased facilities: 94
- Total number of rented facilities: 149
- One-quarter (28%) of reported facilities are located inside a designated heritage building.
- Ownership is significantly higher outside of Toronto.
- Only 6% of dance organizations and none of the music organization reported owning any of the facilities they use.
- Cumulative total revenues 2004-2005: \$32.5 million (half reported \$214,936 or less)
- Cumulative total number of public activities / events in 2004-2005: 17,108 (half reported 35 or fewer)
- Cumulative total attendance for public activities / events in 204-2005: 750,018 (half reported 4,350 or fewer)



Capital Project Requirements

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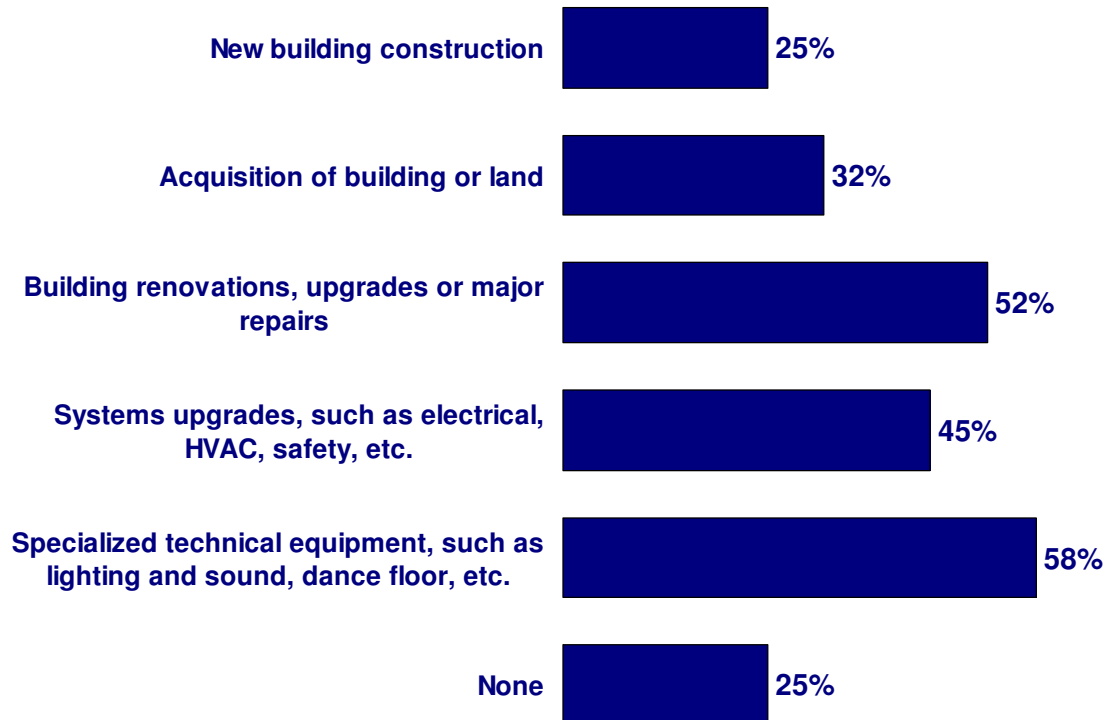


Type of capital expenditures required in the next 10 years

Three-quarters (75%) of arts organizations expect to require at least one capital expenditure for the following types of requirements. Specialized technical equipment including lighting, sound, dance floor and/or building renovations, upgrades or major repairs, and systems upgrades are the main needs.

% of organizations who report expected capital expenditures within the next 10 years

(base: all respondents n=164)



Capital expenditure required in the next 10 years	
1 expenditure	13%
2 expenditures	18%
3 expenditures	22%
4 expenditures	12%
All 5 types of expenditures	10%

Q27. Thinking specifically about your organization's facility requirements overall, please indicate which, if any, of the following capital expenditures, you expect your organization will require within the next 10 years.

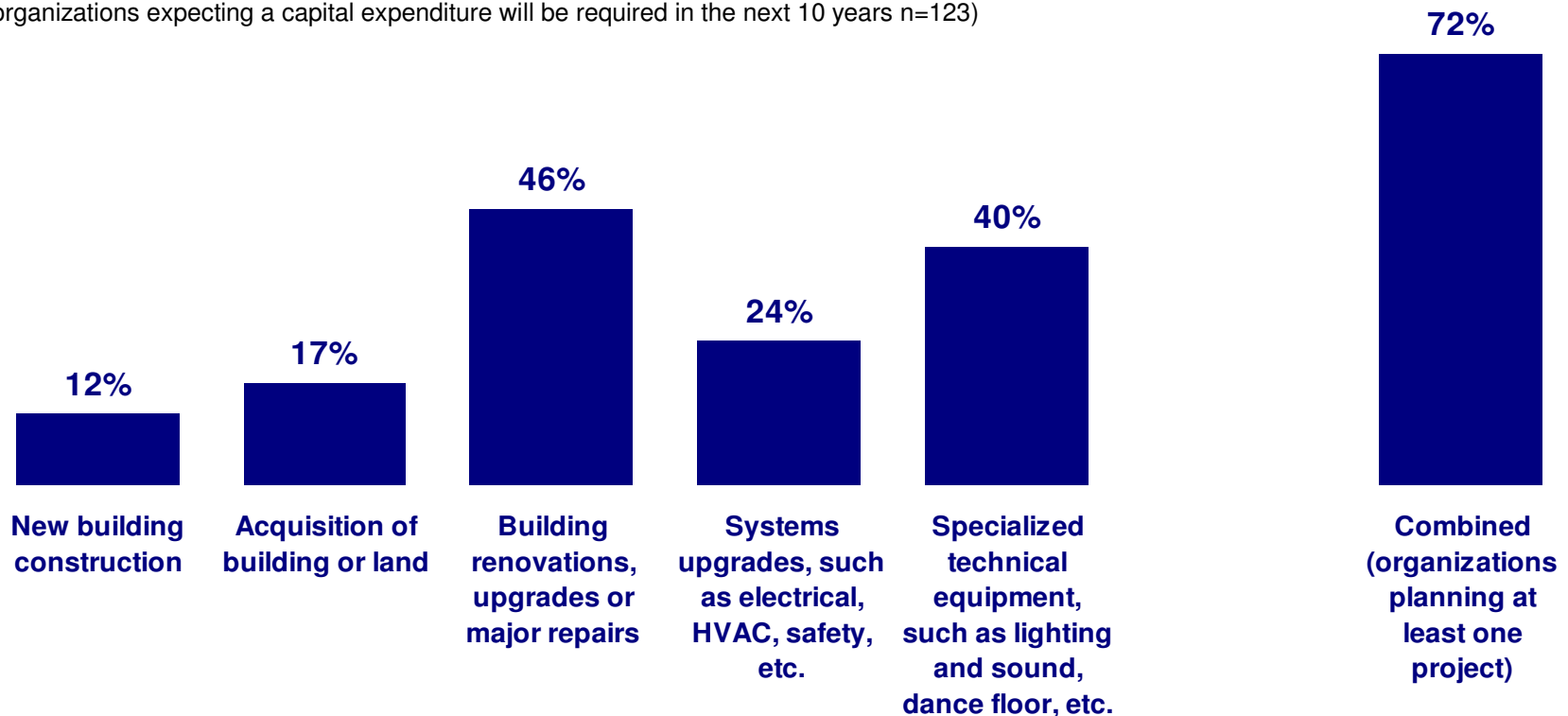


Type of capital projects currently being planned

Of those who expect a capital expenditure will be required in the next 10 years, 72% are current planning at least one capital project³. Building renovations and specialized technical equipment expenditures comprise most planned projects.

% of organizations who indicate they are currently planning a capital project within the next 10 years

(base: organizations expecting a capital expenditure will be required in the next 10 years n=123)



³ An expected capital expenditure refers to a capital expenditure that an organization feels their facility will require in the next 10 years. A planned capital expenditure is one that the organization is currently planning.

Q29. For each of the following capital expenditures that your organization requires, please indicate which, if any, your organization is currently planning.



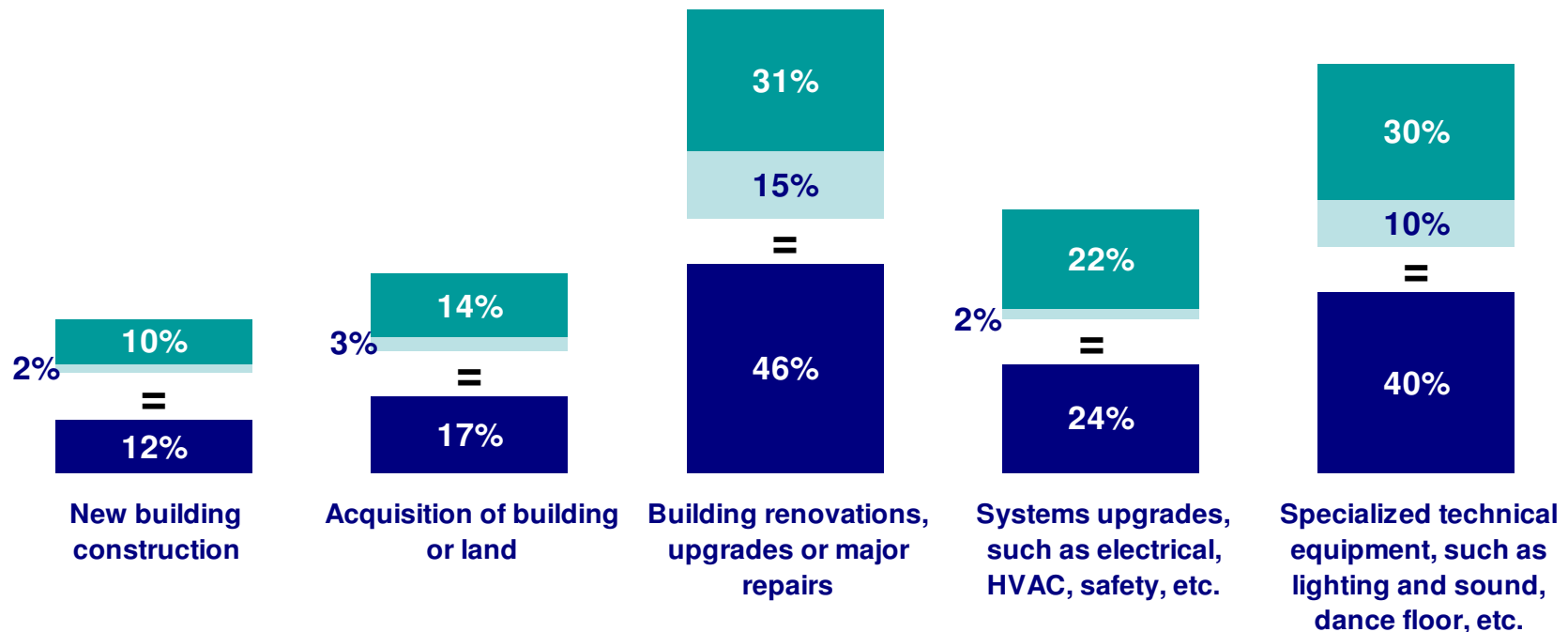
Percentage of currently planned projects with professional quotes plus those based on estimated costs

15% of organizations requiring building renovations have already secured a professional quote, as have 10% of those seeking specialized technical equipment.

% of organizations who indicate they are current planning a capital project within the next 10 years

(base: organizations expecting a capital expenditure will be required in the next 10 years n=123)

■ % planning ■ % have a professional quote ■ % estimated cost



Q29. For each of the following capital expenditures that your organization requires, please indicate which, if any, your organization is currently planning. Base: Those who say capital expenditures will be required in the next 10 years. (n=123) Q30. Has your organization received a professional quote for the completion of this project? Q32. What do you estimate the approximate cost would be for the completion of this project?



Total Cumulative Cost of Projects Planned for the Next 10 Years by Type of Capital Project

Total planned expenditure based on professional quotes obtained or cost estimates.

	Number of projects	Professional Quotes Total	Number of projects	Estimated total	Number of projects	Cumulative total
New building construction	3	\$785,000	13	\$47,250,000	16	\$48,035,000
Acquisition of building or land	3	\$1,150,000	24	\$24,065,000	27	\$ 25,215,000
Building renovations	18	\$1,888,000	39	\$20,217,000	57	\$22,105,000
System upgrades	7	\$627,000	18	\$2,519,000	25	\$3,146,000
Specialized technical equipment	13	\$1,414,500	32	\$4,193,000	45	\$5,608,000
TOTAL	44	\$5,864,500	126	\$98,244,000	170	\$104,109,000

Note: these are self-reported by respondents who participated in the survey. For 4 projects, the respondent entered 0 or did not answer the quote / cost estimate. These have been excluded from counts. Number rounded to nearest \$500.

Q29. For each of the following capital expenditures that your organization requires, please indicate which, if any, your organization is currently planning. Base: Those who say capital expenditures will be required in the next 10 years. (n=123) Q30. Has your organization received a professional quote for the completion of this project? Q32. What do you estimate the approximate cost would be for the completion of this project?



Total Cumulative Cost of Projects Planned For the Next 3 Years by Type of Capital Project

Total planned expenditure in the next 3 years based on professional quotes obtained or cost estimates.

	Number of projects	Professional Quotes Total	Number of projects	Estimated total	Number of projects	Cumulative total
New building construction	3	\$785,000	5	\$4,600,000	8	\$5,385,000
Acquisition of building or land	1	\$400,000	11	\$5,080,000	12	\$5,480,000
Building renovations	11	\$923,000	20	\$3,550,7000	31	\$4,473,700
System upgrades	6	\$617,000	10	\$1,402,500	16	\$2,019,500
Specialized technical equipment	12	\$1,289,500	23	\$1,112,000	35	\$2,401,500
TOTAL	33	\$4,014,500	69	\$15,745,200	102	\$19,759,700

Note: these are self-reported by respondents who completed the survey. For 3 projects, the respondent entered 0 or did not answer the quote / cost estimate. These have been excluded from counts. Totals have been rounded to the nearest \$500.

Q29. For each of the following capital expenditures that your organization requires, please indicate which, if any, your organization is currently planning. Base: Those who say capital expenditures will be required in the next 10 years. (n=123) Q30. Has your organization received a professional quote for the completion of this project? Q32. What do you estimate the approximate cost would be for the completion of this project?

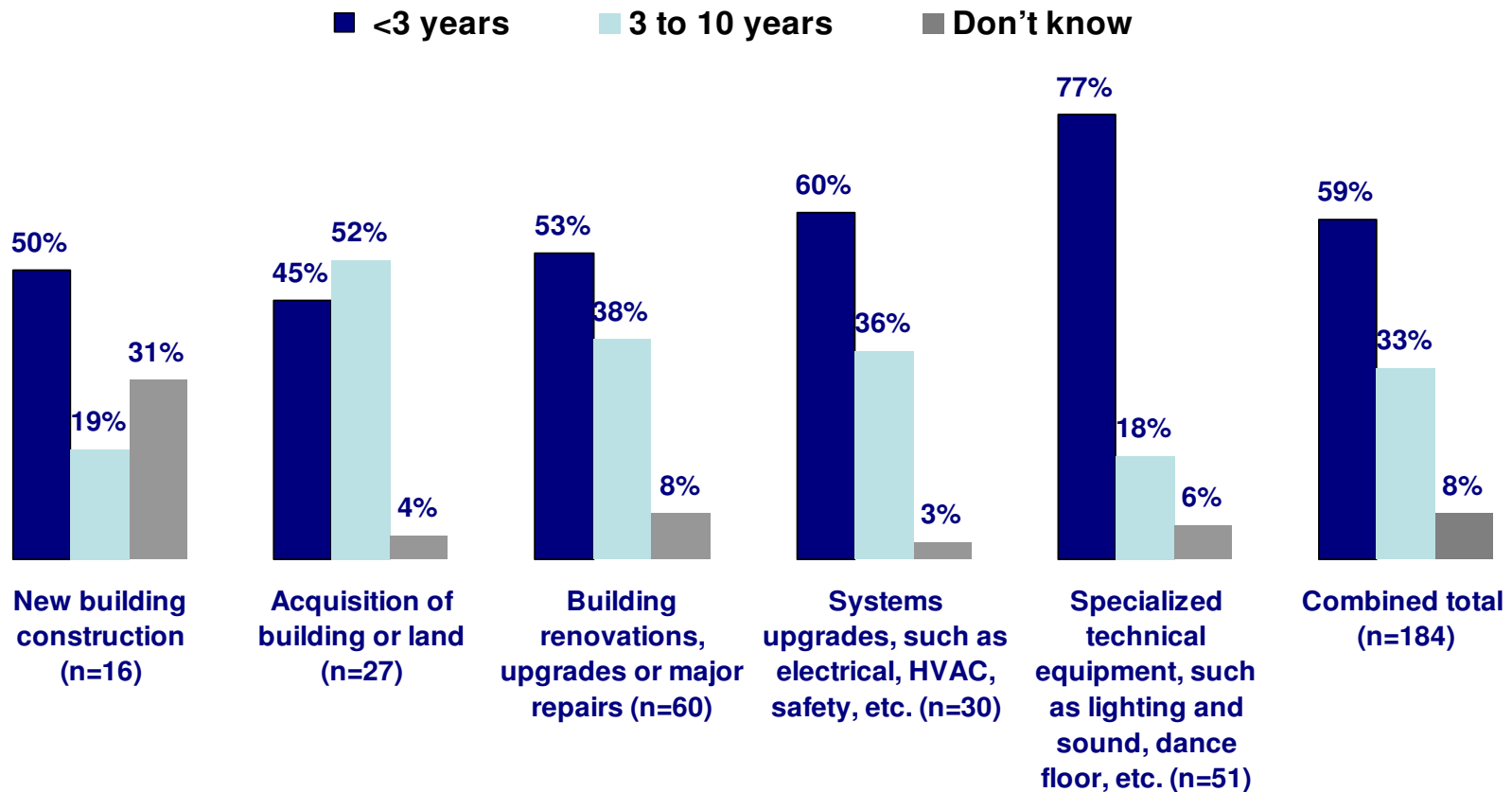


Expected timeline for completion of projects

Over half (59%) of planned projects in all categories are expected to be completed within the next 3 years. Over three-quarters of the planned projects for technical equipment are expected within 3 years.

% of organizations who report expected capital expenditures within the next 10 years

(base: projects currently planned n=184)





Gaps in the existing cultural infrastructure inventory

- Seven in ten (69%) of the organizations surveyed report insufficient access to at least one type of required facility.
- Storage and service area facilities⁴ are in greatest need. Half (45%) of organizations report a lack of access to storage and service area facilities. One-third report a lack of rehearsal / production facilities (39%) and the same proportion lack public presentation facilities (34%).

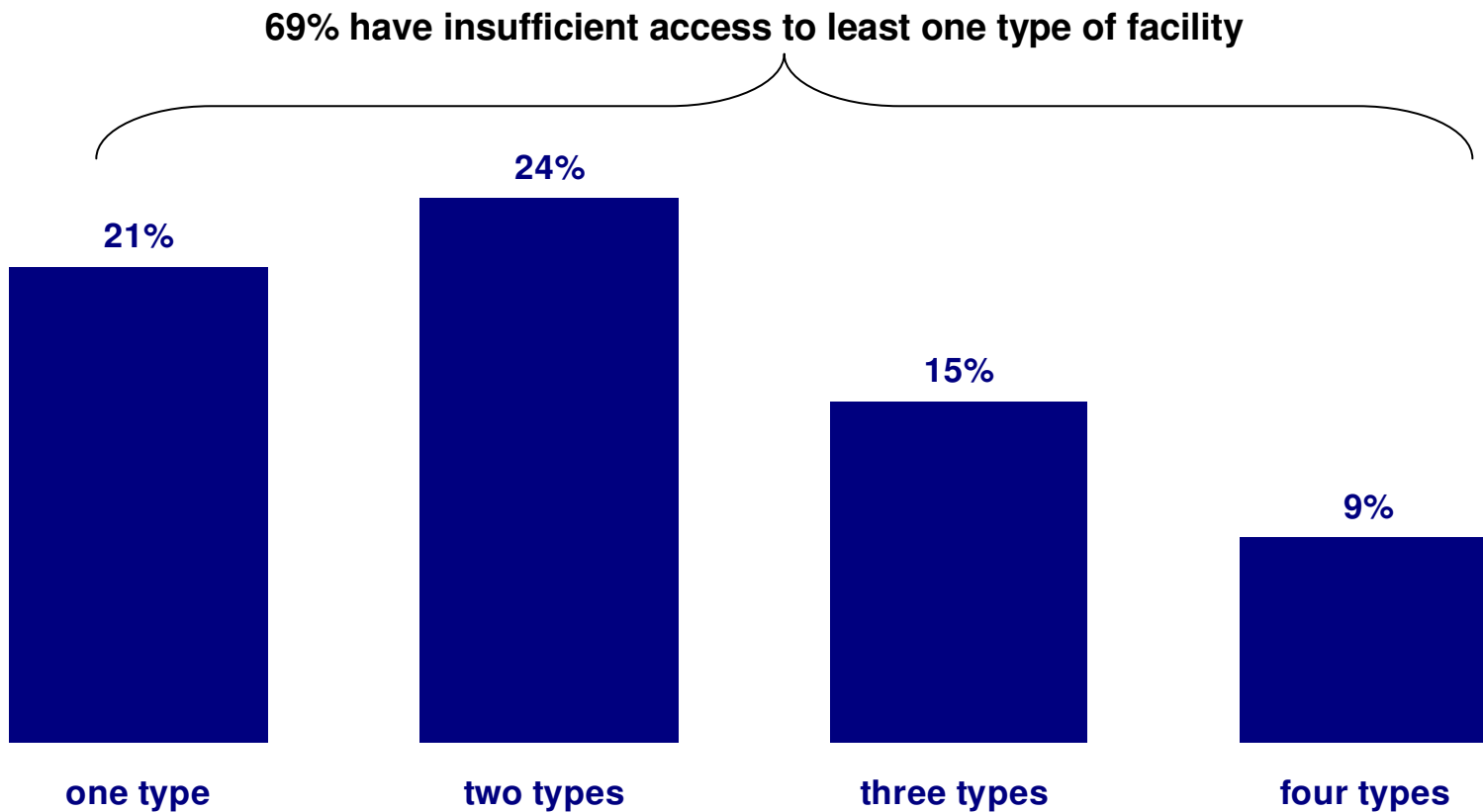
⁴ Storage and service area includes all “behind the scenes” spaces such as storage for artwork, sets and costumes, plus dressing rooms and wings in theatres.



Overall Access to Facilities

% of organizations who report insufficient access to a facility for public presentation, rehearsal or production, administration or other (i.e. storage)

(base: all respondents n=164)



Calculated on aggregate number of responses, rather than respondents

Q4. For each of the following categories, please indicate if your organization has sufficient access to a facility or facilities in Ontario to meet your needs yes or no?

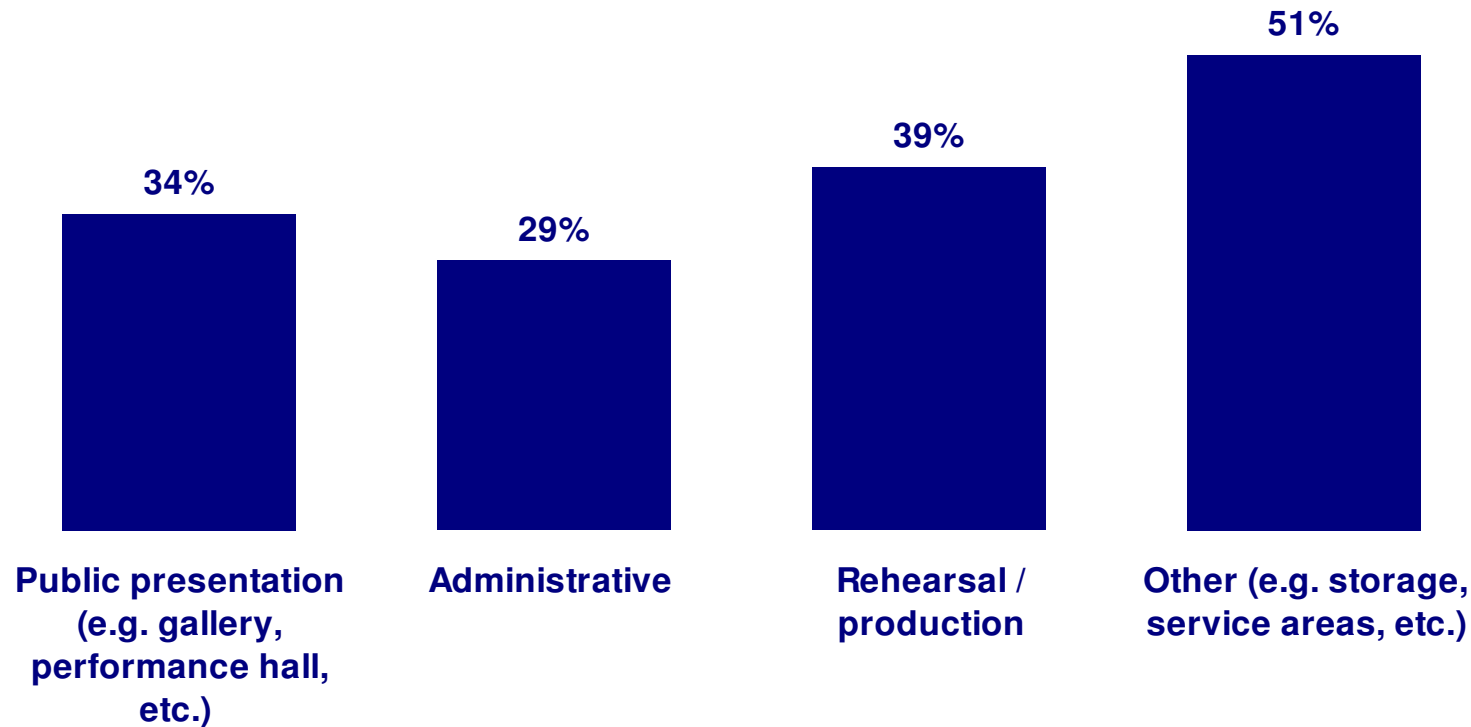


Type of Facilities in Need

Half (51%) of respondents report a lack of access to storage and service area facilities. One-third report a lack of rehearsal / production facilities (39%) and the same proportion lack public presentation facilities (34%).

% organizations who report insufficient access to ...

(base: all respondents n=164)



Q4. For each of the following categories, please indicate if your organization has sufficient access to a facility or facilities in Ontario to meet your needs?

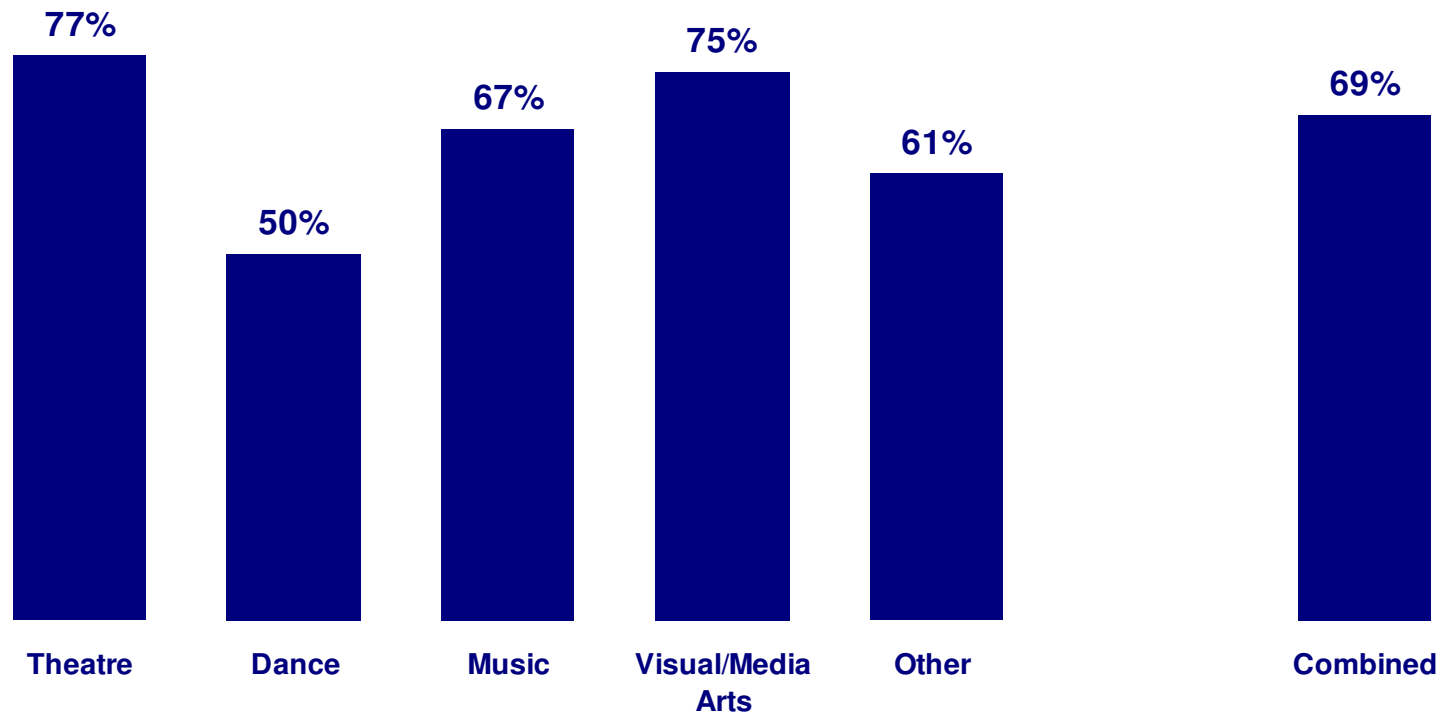


Disciplines Most In Need

69% of all organization report a lack of access to at least one needed facility. At least half (50%) of the organizations in each discipline report a lack of access to at least one needed facility.

% organizations who report insufficient access to at least one type of facility

(base: all respondents n=164)



Q4. For each of the following categories, please indicate if your organization has sufficient access to a facility or facilities in Ontario to meet your needs?

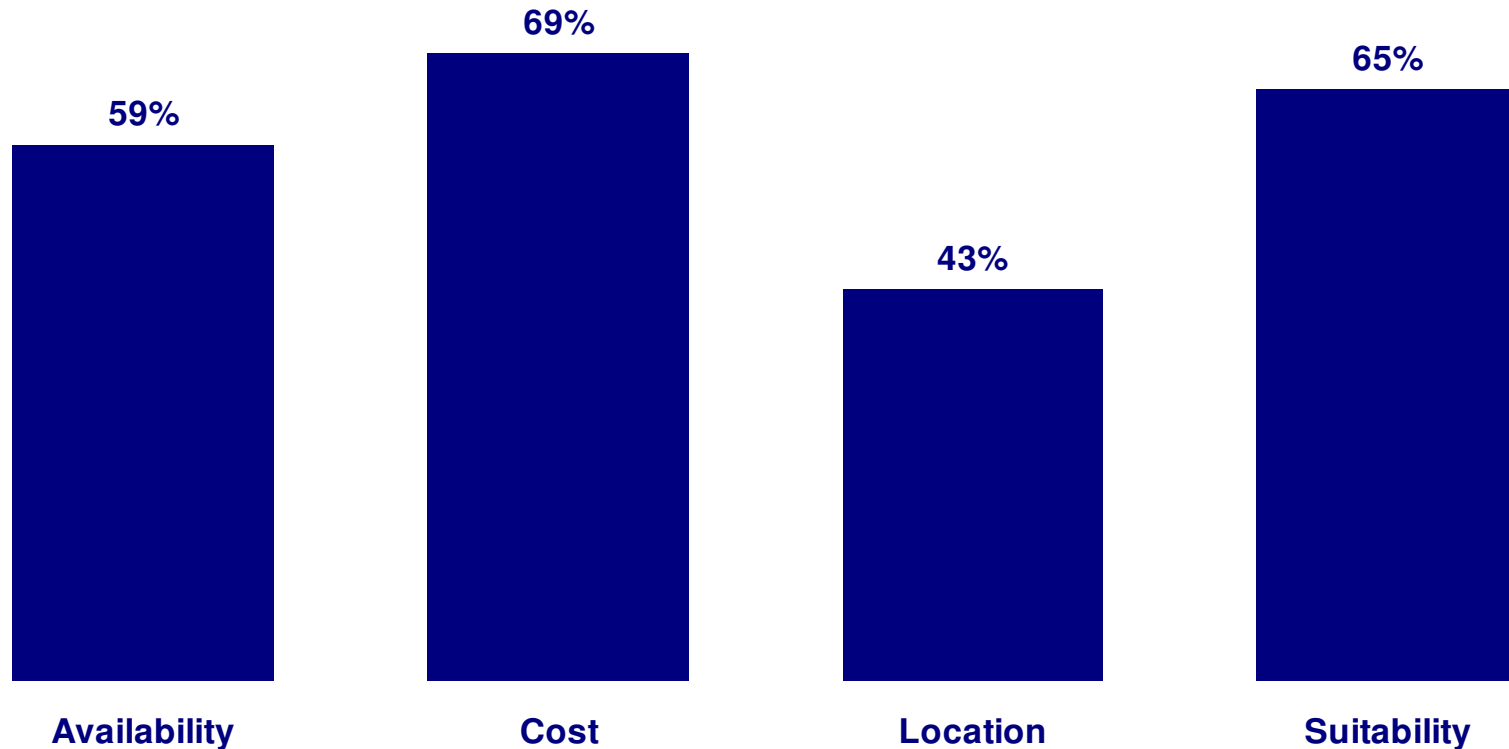


Main reasons for insufficient access to facilities

Organizations feel there are few reasons for a lack of these types of facilities. The main ones being cost (69%), suitability (65%) and availability (59%).

% organizations who report insufficient access to at least one type of facility

(base: do not have access to facilities – aggregate of all facility types n=249)



Q4. For each of the following categories, please indicate if your organization has sufficient access to a facility or facilities in Ontario to meet your needs?



Age and life-cycle upgrades/replacement requirements and timelines of existing facilities

- Nearly half (45%) of the facilities owned and leased by small to mid-sized arts organizations are 75 years of age or older.
- In 2004-2005 organizations spent a cumulative total of \$2.2 million on repairs and upkeep for owned facilities.
- Two in ten (16%) organizations report having a capital reserve fund. None of the dance or music organizations surveyed indicate having a capital reserve fund. The cumulative total amount of capital reserves is \$ 3.5 million. Half have \$73,789 or less in their capital reserve fund.
- Respondents most frequently indicate using their operating budget, fundraising, Ontario Trillium Foundation grants or municipal grants for capital expenditures made within the last 5 years.

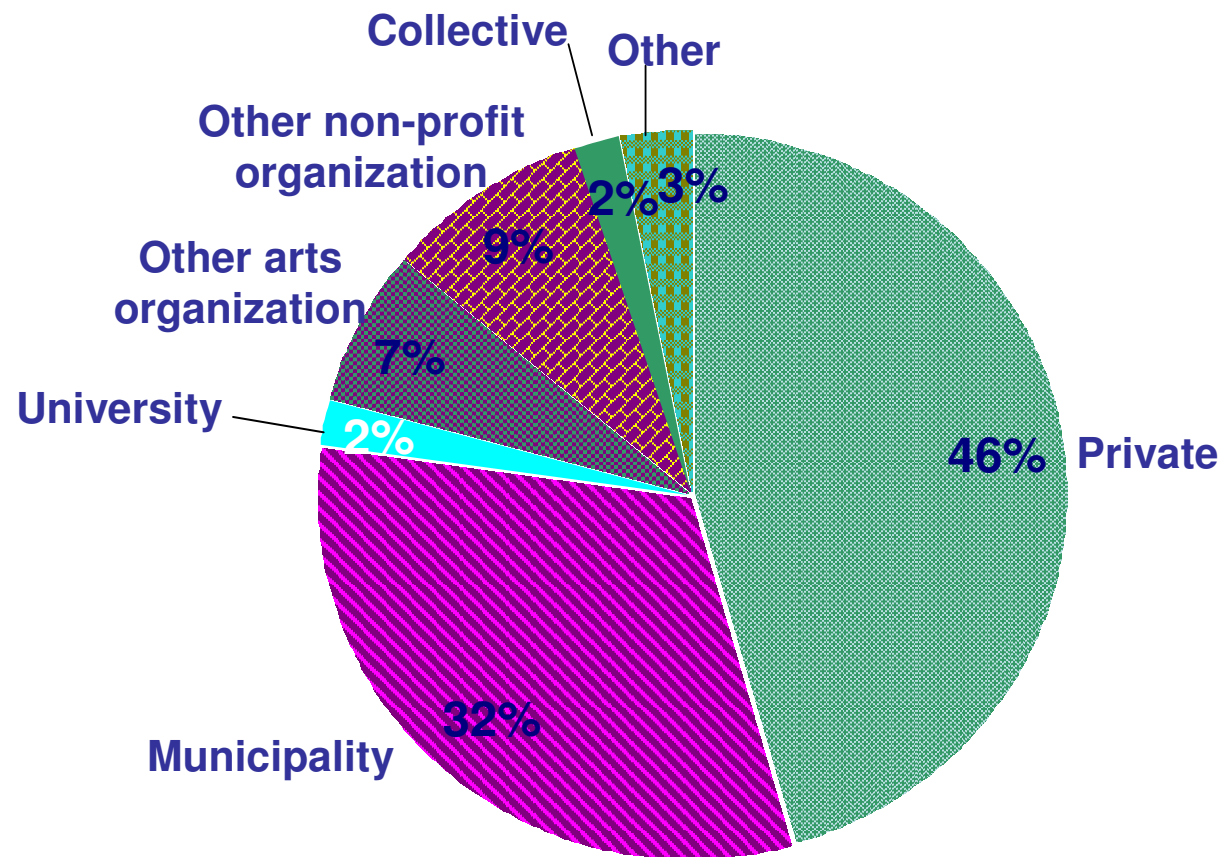


Owners of leased facilities

Most facilities currently being leased are owned by a private landlord (46%) or a municipality (32%).

% of leased facilities...

(base: leased facilities n=117)



Q22. Which of the following best describes the current owner of this facility?

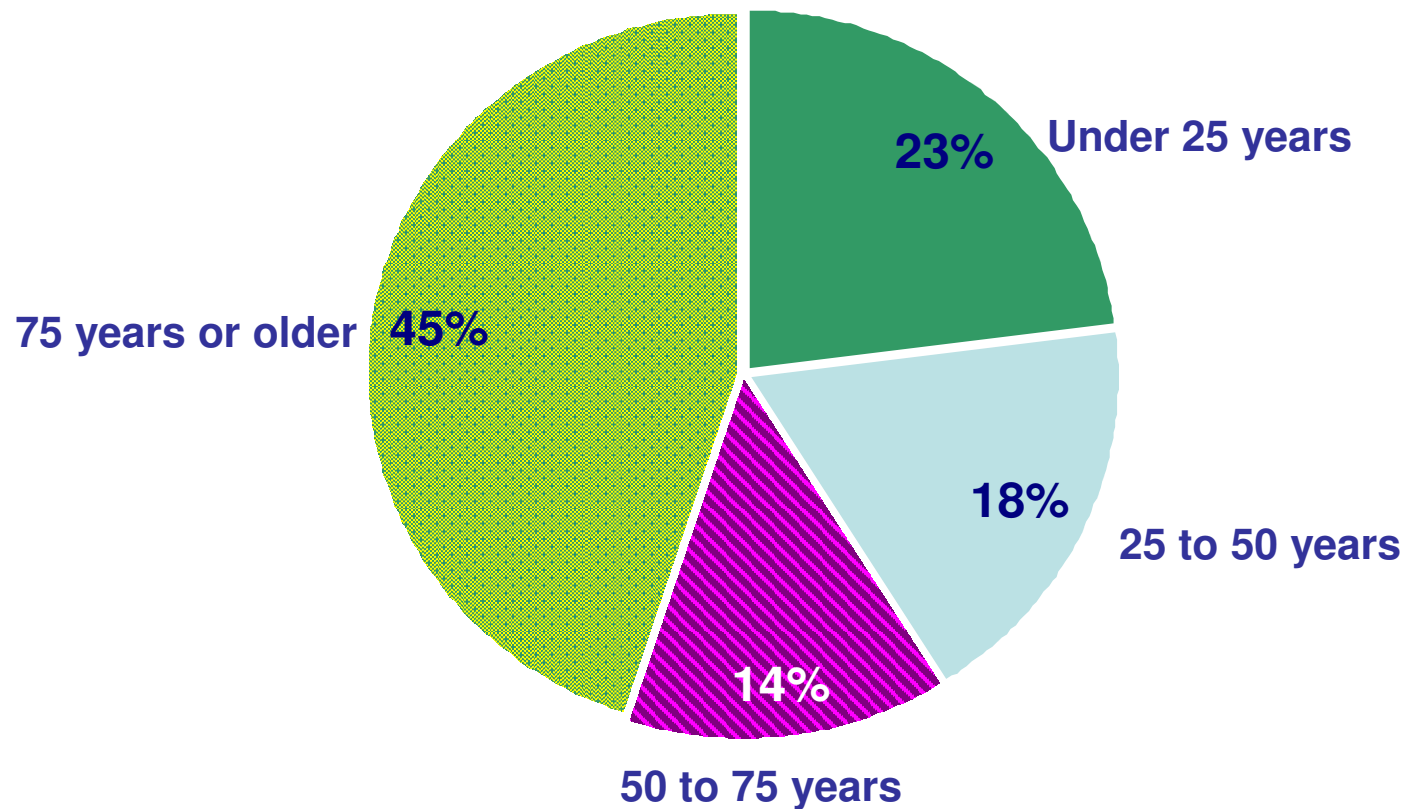


Age of owned facilities and leased facilities

Nearly half (45%) the sector's owned and leased facilities are 75 years of age or older.

% of owned or leased facilities...

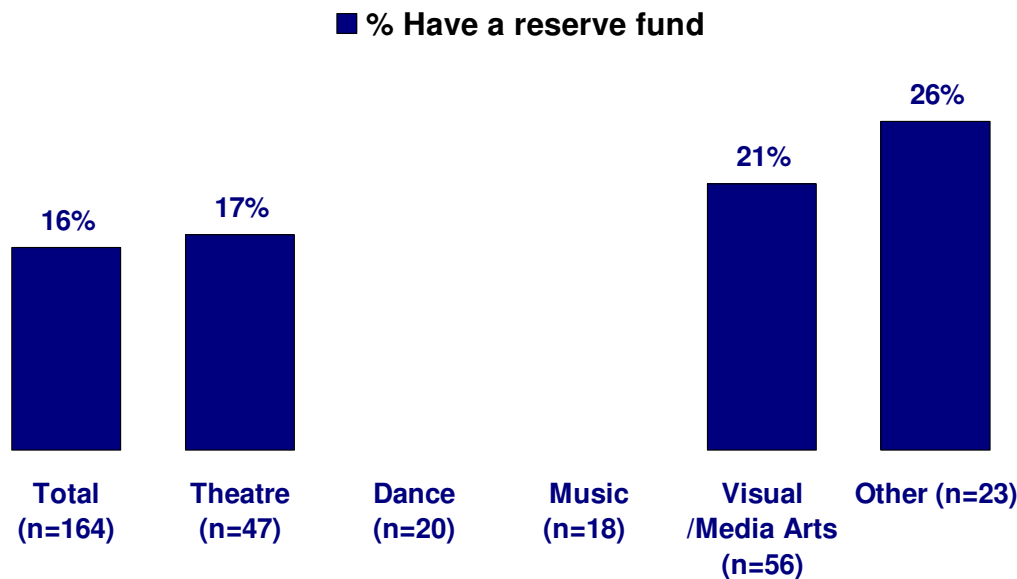
(base: all owned or leased facilities n=157)





Incidence of arts organizations that have a capital reserve fund and amount of fund

Two in ten (16%) arts organizations report having a capital reserve fund. None of the dance or music organizations surveyed indicate having a capital reserve fund. The cumulative total amount of organizations capital reserves is \$ 3.5 million. Half have \$73,789 or less in their capital reserve fund.



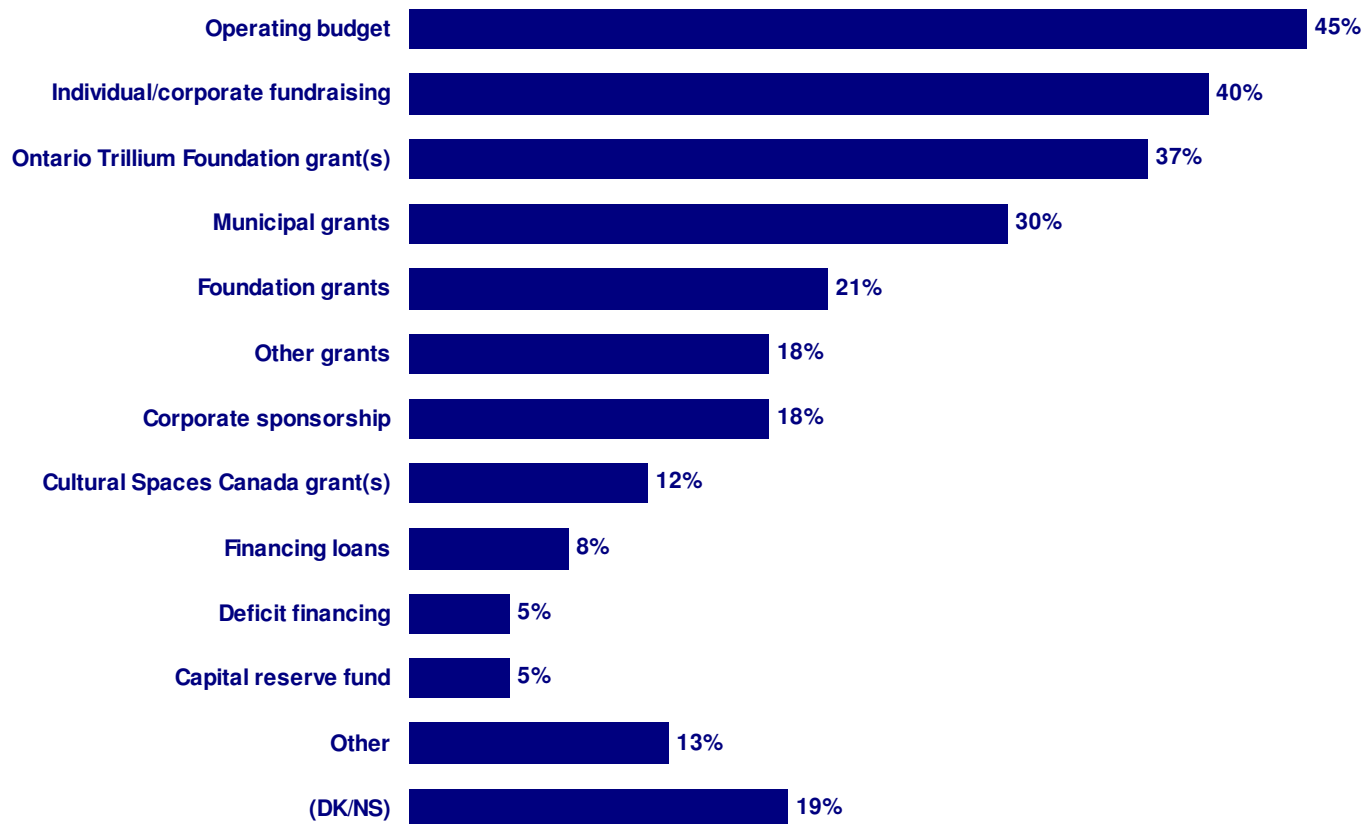
Amount in reserve fund (of those who have a reserve fund)

	Mean (incl. 0)	Mean (excl. 0)	Median
Total (n=26)	\$149,660	\$156,172	\$73,789
Theatre (n=8)	\$125,082	\$127,082	\$73,789
Visual (n=12)	\$109,949	\$119,945	\$42,500
Other (n=6)	\$276,600	\$276,600	\$242,500



Funding sources used for capital expenditures over the past 5 years

Organizations most frequently indicate using their operating budget, fundraising, Ontario Trillium Foundation grants or municipal grants for capital expenditures made within the last 5 years.



Q39. Thinking about the capital expenditures your organization has undertaken in the last five years, which of the following sources did you use to finance these expenditures?



Organization profile data

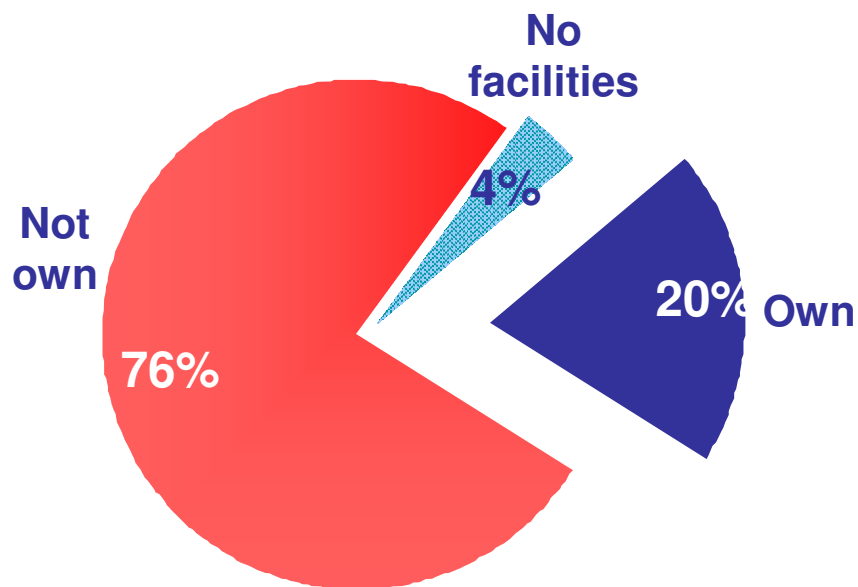
- In 2004/2005, the 164 organizations surveyed reportedly used a total of 485 facilities
- Since a number of these facilities are used by more than one organization, survey respondents were required to provide the address of each facility they use. In order to keep the survey to a realistic length and to avoid respondent fatigue, organizations were required to list the addresses of up to 9 facilities, even if they use more than 9 facilities. This included up to 3 owned, up to 3 leased and up to 3 rented facilities. Excluding duplication between organizations (eg. two organizations rented the same facility last year), **254 unique facilities were used in 2004/2005**. This figure was calculated by first removing duplication within each ownership categories (n=280) than removing duplication across ownership categories – e.g. if one organization owns the building and another organization leases space in it, the facility is only counted once).
- Total number of owned facilities: 37 (42 reported, 40 addresses given, 37 unique owned facilities)
- Total number of leased facilities: 94 (128 reported, 117 addresses given, 94 unique leased facilities)
- Total number of rented facilities: 149 (315 reported, 207 addresses given, 149 unique rented facilities)
- One-quarter (28%) of reported facilities are located inside a designated heritage building.
- Ownership is significantly higher outside of Toronto.
- Only 6% of dance organizations and none of the music organization reported owning any of the facilities the use.
- Cumulative total revenues 2004-2005: \$32.5 million (half reported \$214,936 or less)
- Cumulative total number of public activities / events in 2004-2005: 17,108 (half reported 35 or fewer)
- Cumulative total attendance for public activities / events in 2004-2005: 750,018 (half reported 4,350 or fewer)



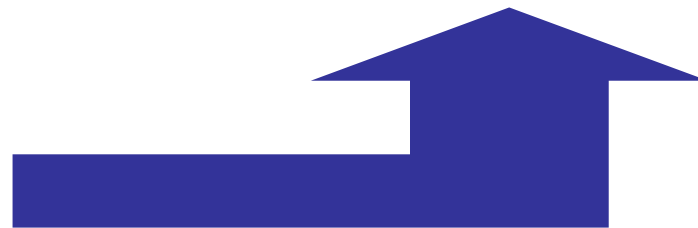
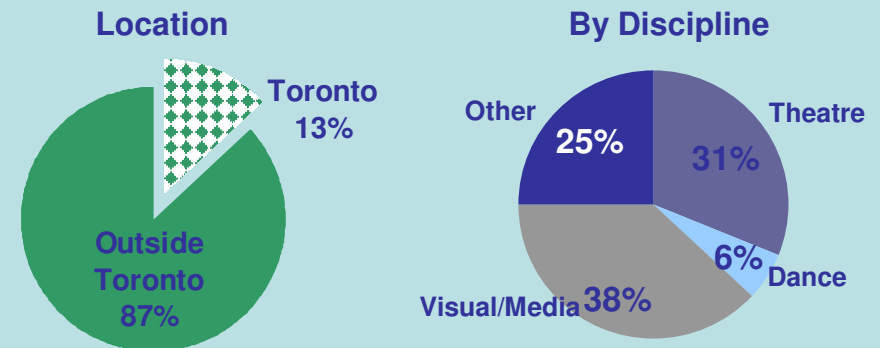
Ownership of Facilities

Only 2 in 10 organizations own any of their facilities. Ownership is significantly higher outside of Toronto. Only 6% of dance organizations and none of the music organization reported owning any of the facilities they use.

Ownership of facilities



OWNERS



Q6. Please enter the number of facilities your organization owned, leased, and rented in Ontario for the 2004/2005 fiscal year. By lease, we mean your organization has a written agreement with your landlord for a minimum of 1 year. By rent, we mean your organization has weekly or monthly agreement or an agreement for a period of less than 1 year. This would include event-based arrangements.

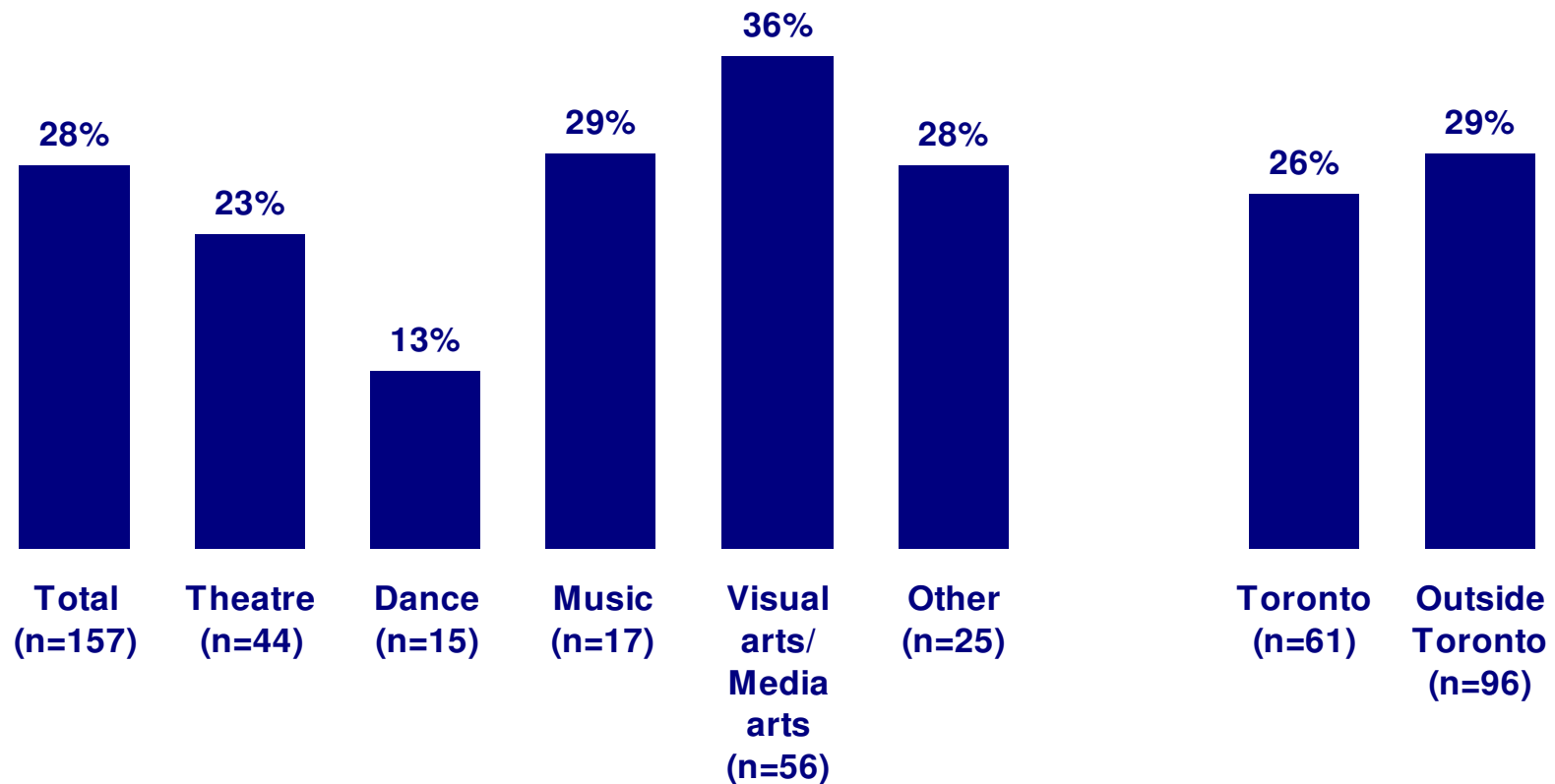


Incidence of facilities designated as a heritage building

Roughly one-quarter (28%) of owned or leased facilities is designated as a heritage building.

% of facilities located in a heritage building

(base: owned or leased facilities n=157)





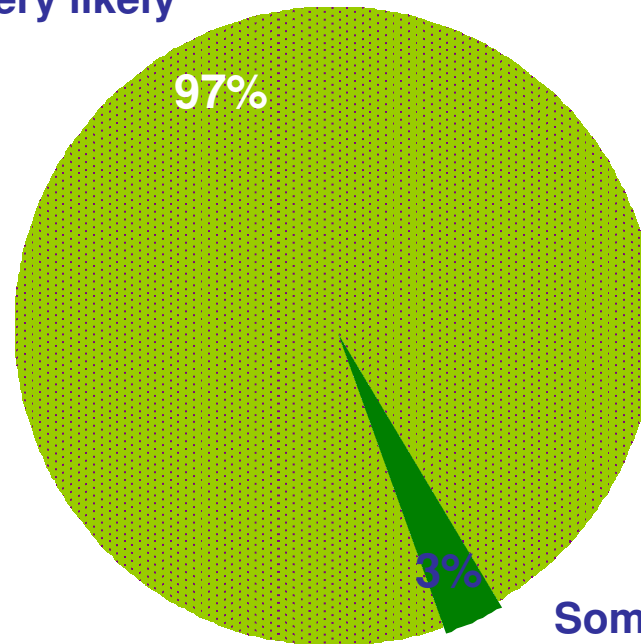
Likelihood to apply for funding from a new capital grants program

97% of organizations planning a project indicated they would be very likely to apply.

% projects very likely to apply for funding...

(base: organizations planned project n=184)

Very likely



Somewhat likely

Q40. If a capital grants program geared to the needs of small and mid-sized arts organizations existed please indicate how likely your organization would be to apply for the following types of funding. Please select one for each type.



Appendix

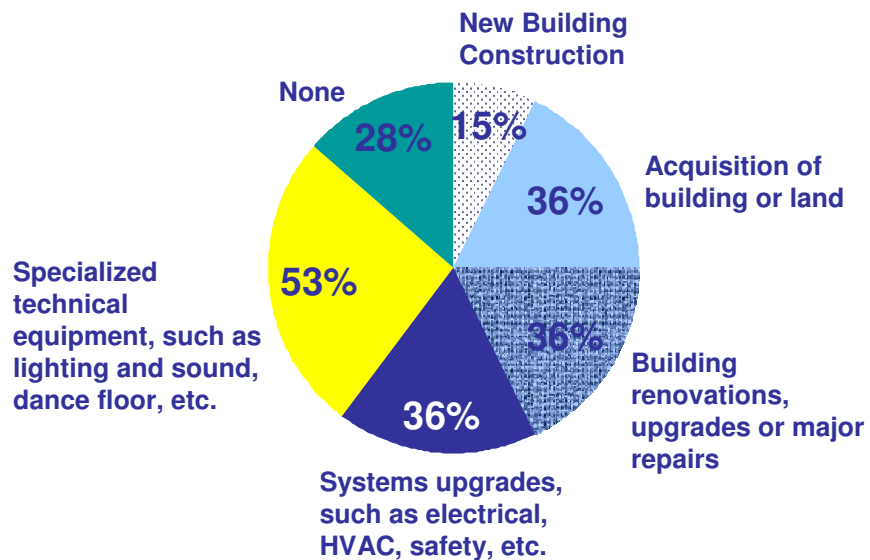


Required Capital Expenditure By Discipline

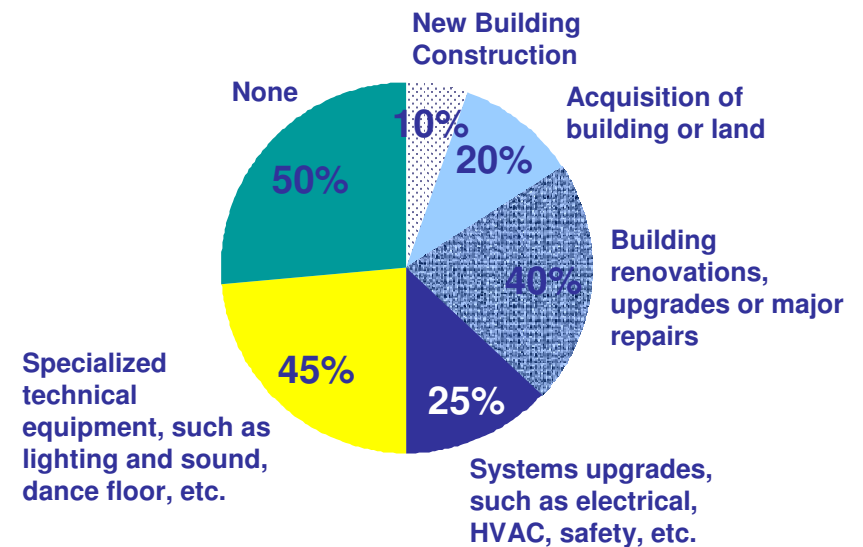
% of organizations who report expected capital expenditures within the next 10 years

(base: projects currently planned n=184)

Theatre (n=47)



Dance (n=20)



Q27. Thinking specifically about your organization's facility requirements overall, please indicate which, if any, of the following capital expenditures, you expect your organization will require within the next 10 years.

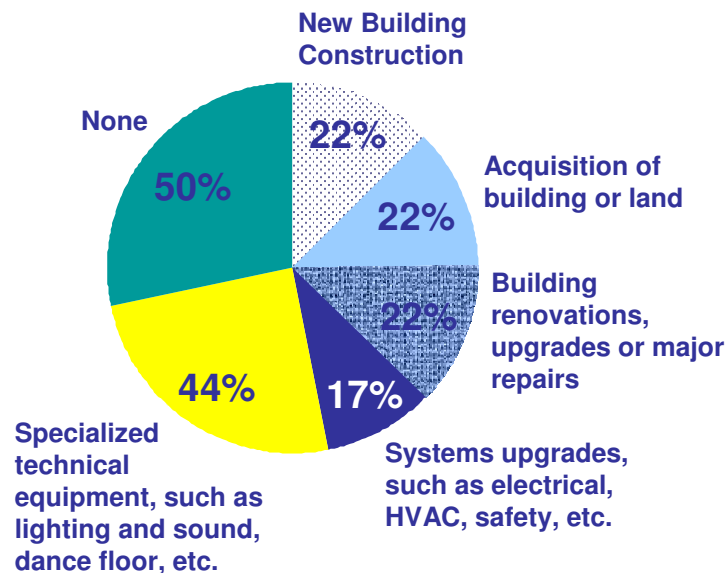


Required Capital Expenditure By Discipline

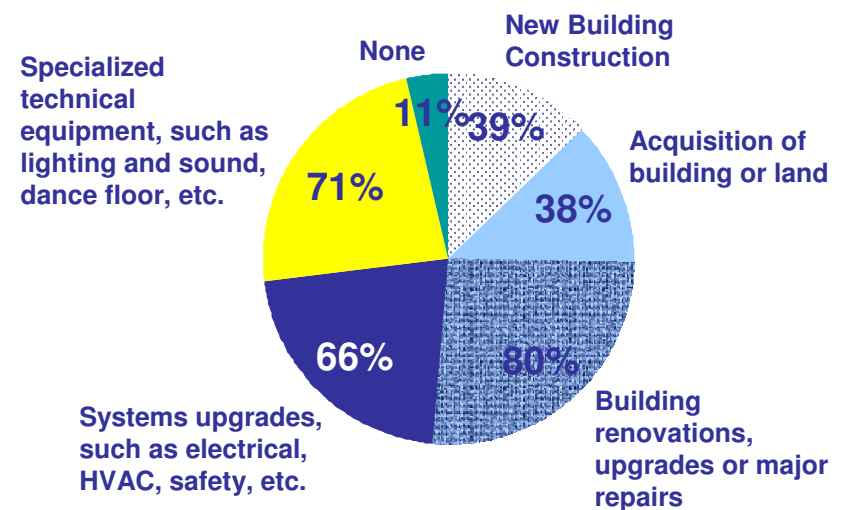
% of organizations who report expected capital expenditures within the next 10 years

(base: projects currently planned n=184)

Music (n=18)



Visual/Media arts (n=56)



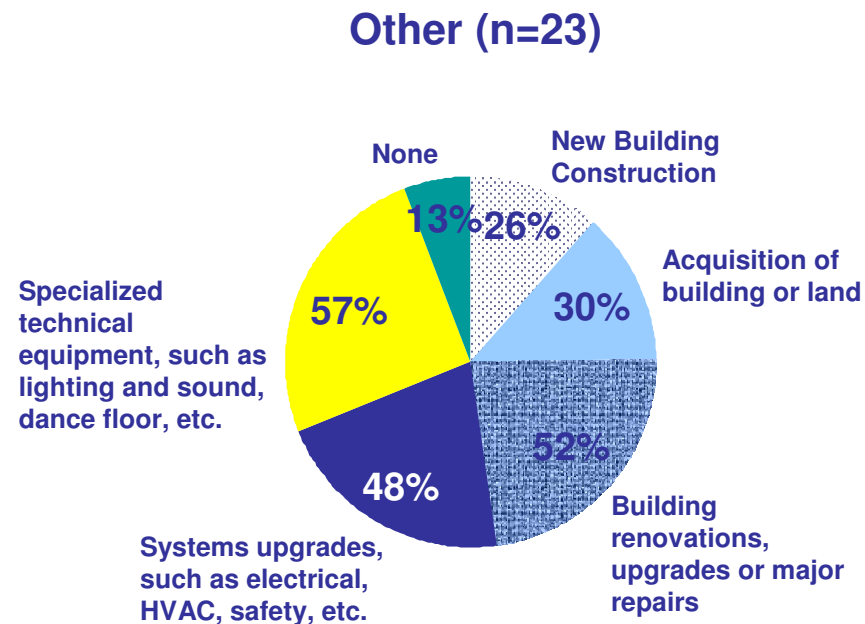
Q27. Thinking specifically about your organization's facility requirements overall, please indicate which, if any, of the following capital expenditures, you expect your organization will require within the next 10 years.



Required Capital Expenditure By Discipline

% of organizations who report expected capital expenditures within the next 10 years

(base: projects currently planned n=184)



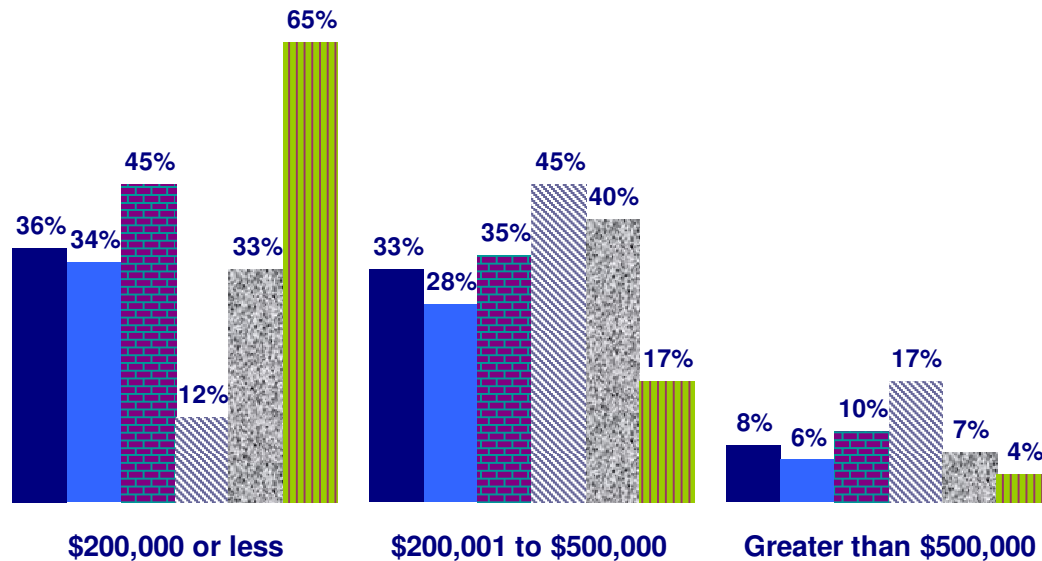
Q27. Thinking specifically about your organization's facility requirements overall, please indicate which, if any, of the following capital expenditures, you expect your organization will require within the next 10 years.



Reported 2004-2005 Revenue by Discipline

Half of organizations surveyed report revenues of \$214K or less for the 2004/2005 year.

■ Total ■ Theatre ■ Dance ■ Music ■ Visual/Media ■ Other



	Mean (incl. 0)	Mean (excl. 0)	Median
Total (n=164)	\$254,869	\$256,892	\$214,936
Theatre (n=47)	\$251,103	\$259,203	\$224,617
Dance (n=20)	\$261,617	\$261,617	\$211,524
Music (n=18)	\$357,040	\$357,040	\$313,400
Visual (n=56)	\$266,769	\$266,769	\$256,981
Other (n=23)	\$162,231	\$162,231	\$131,990

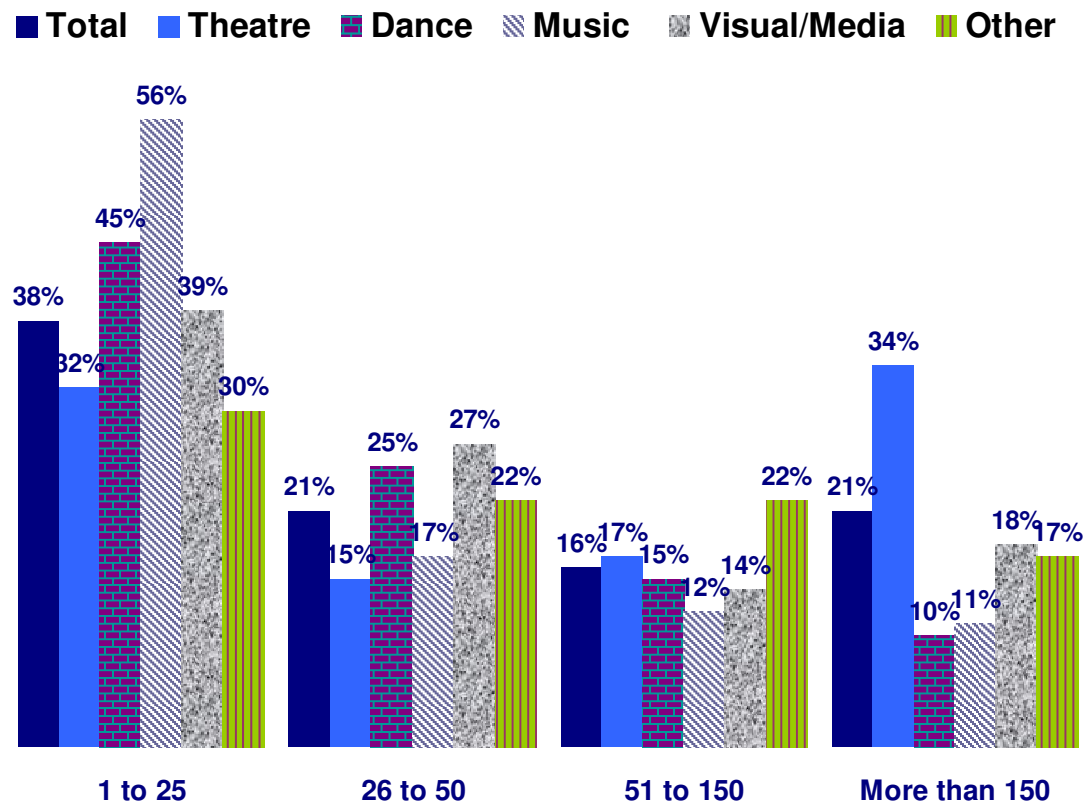
Don't know responses not shown

Q1. What was your organization's total revenue for the 2004/2005 fiscal year?



Reported Number of Public Activities / Events 2004-2005 by Discipline

This revenue is based on a median of 35 public activities / events.



	Mean (incl. 0)	Mean (excl. 0)	Median
Total (n=164)	107	108	35
Theatre (n=47)	157	160	51
Dance (n=20)	51	51	23
Music (n=18)	55	55	21
Visual (n=56)	105	105	30
Other (n=23)	95	95	37

Don't know responses not shown

Q2. What was the total number of public activities/events conducted by your organization in the 2004/2005 fiscal year, including presentations, exhibitions, performances, shows, concerts, etc.?



Reported Total Attendance 2004-2005 By Discipline

The cumulative self-reported total attendance in 2004-2005 among all survey respondents is 750K With a median attendance of 4350 for all public activities/ events.

	Mean (incl. 0)	Mean (excl. 0)	Median
Total (n=164)	6521	6579	4350
Theatre (n=47)	5888	6078	3429
Dance (n=20)	5721	5721	3745
Music (n=18)	6666	6666	3830
Visual (n=56)	6912	6912	5065
Other (n=23)	7692	7692	5400

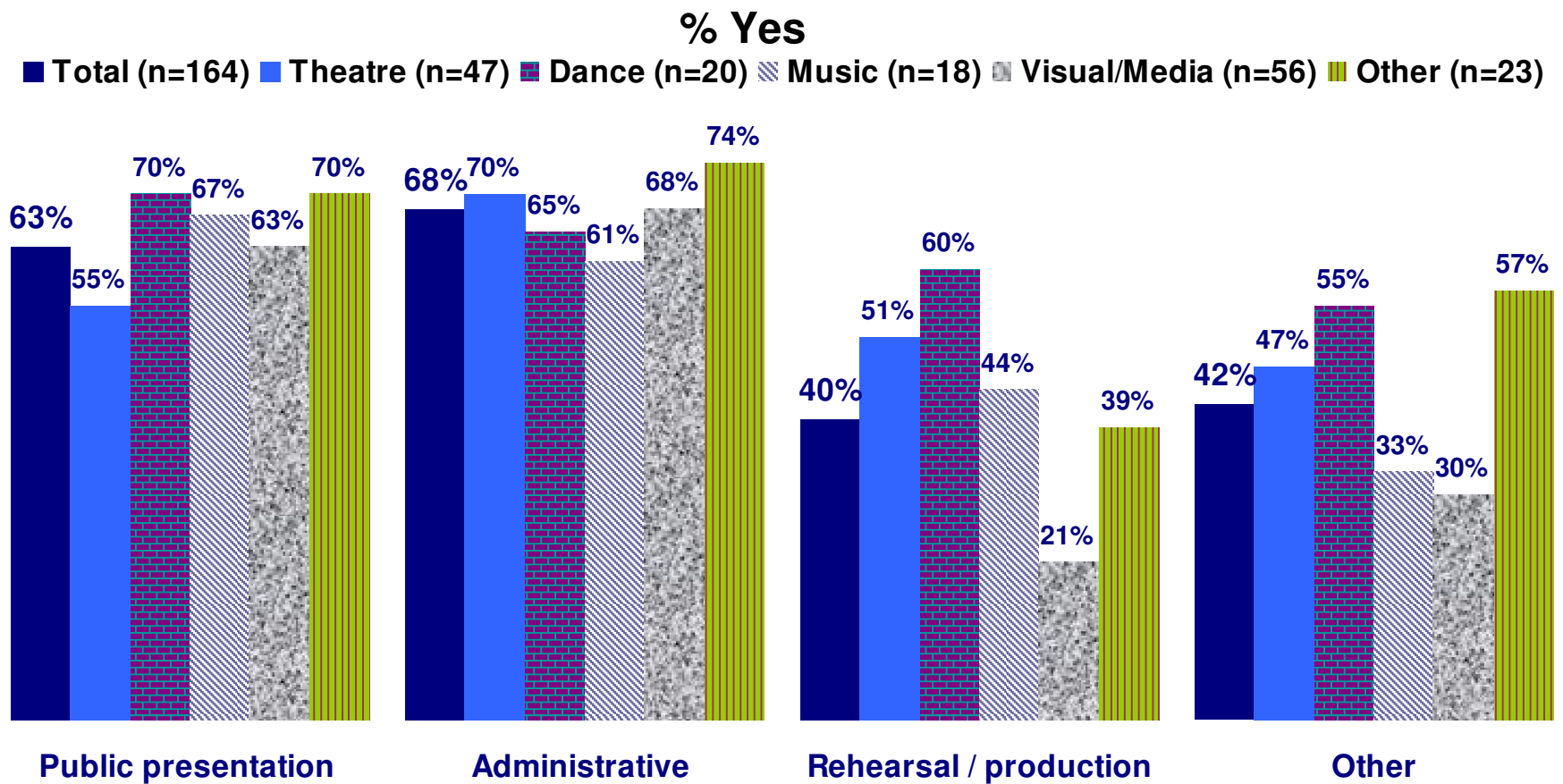
Don't know responses not shown

Q3. What was the total attendance at all public activities/events conducted by your organization in the 2004/2005 fiscal year?



Type of Facilities Needed by Discipline

While most organizations have access to public presentation and administrative space, there is less access to rehearsal/production and other space (eg. storage or service area) . Organizations report the least access to rehearsal or production or "other" space. Only 4 in 10 indicate sufficient access to this type of space. This is particularly an issue for visual/media arts organization.



Q4. For each of the following categories, please indicate if your organization has sufficient access to a facility or facilities in Ontario to meet your needs?

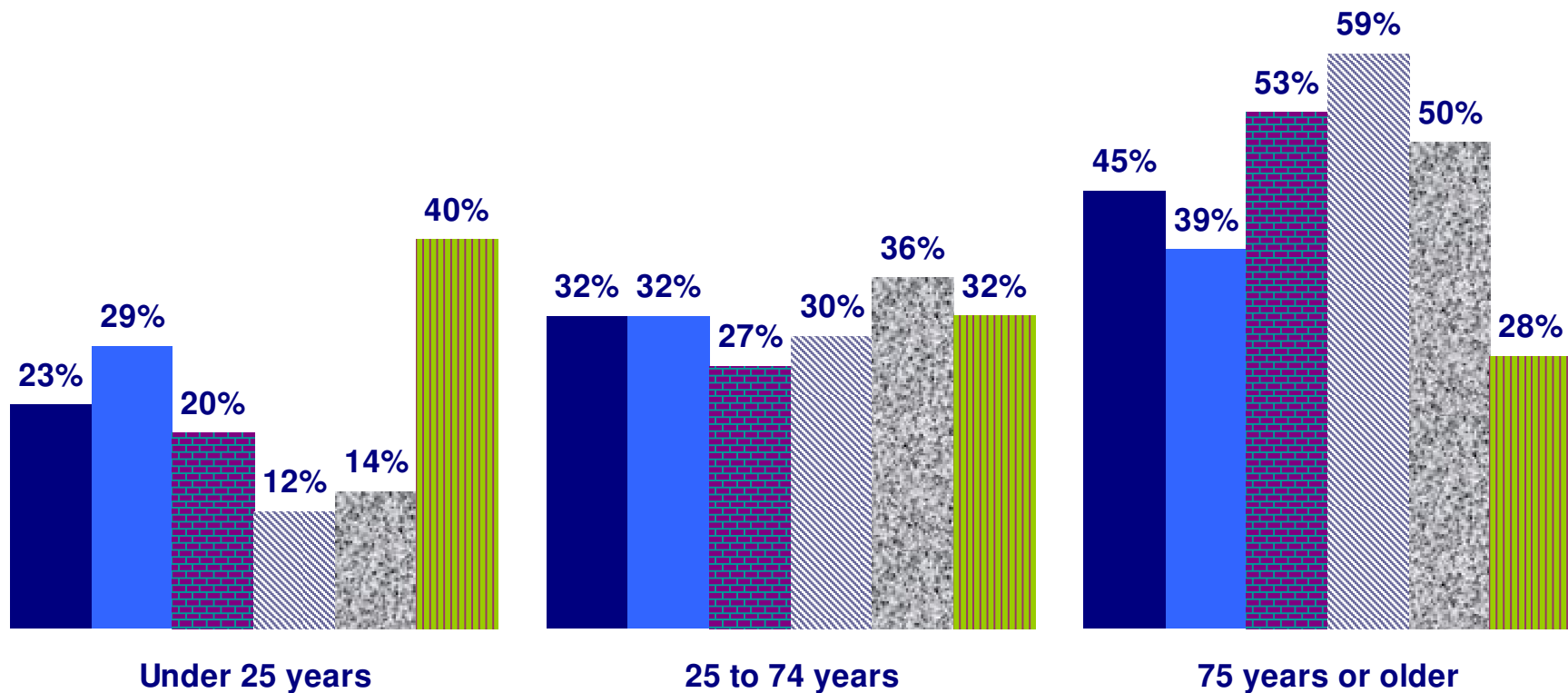


Age of owned facilities and leased facilities by Discipline

Nearly half (45%) owned and leased facilities are 75 years of age or older. While there appears to be some differences between disciplines, none of the differences reach statistical significance.

% Yes

■ Total (n=157) ■ Theatre (n=44) ■ Dance (n=15) ■ Music (n=17) ■ Visual/Media (n=56) ■ Other (n=25)





Summary of facility ownership, leasing and rental

Organizations outside of Toronto are more likely to own a facility – 88% of owned facilities are outside of Toronto versus 12% in Toronto. 60% of rented facilities are in Toronto versus 41% outside of Toronto.

	Total	Discipline from sample					Region from sample	
		Theatre	Dance	Music	Visual/ Media arts	Other	Toronto	Outside Toronto
Base: All respondents	164	47	20	18	56	23	77	87
Own only	20	25%	5%	-	60%	10%	10%	90%
Lease only	35	11%	3%	3%	69%	14%	37%	63%
Rent only	37	32%	24%	16%	16%	12%	59%	41%
Own and Lease not Rent	1	-	-	-	-	100%	-	100%
Own and Rent not Lease	8	38%	12%	-	-	50%	25%	75%
Rent and Lease not Own	54	37%	15%	20%	19%	9%	67%	33%
Rent and Lease and Own	3	67%	-	-	-	33%	-	100%
No facilities	6	17%	-	-	66%	17%	33%	67%

Q6. Please enter the number of facilities your organization owned, leased, and rented in Ontario for the 2004/2005 fiscal year. By lease, we mean your organization has a written agreement with your landlord for a minimum of 1 year. By rent, we mean your organization has weekly or monthly agreement or an agreement for a period of less than 1 year. This would include event-based arrangements.

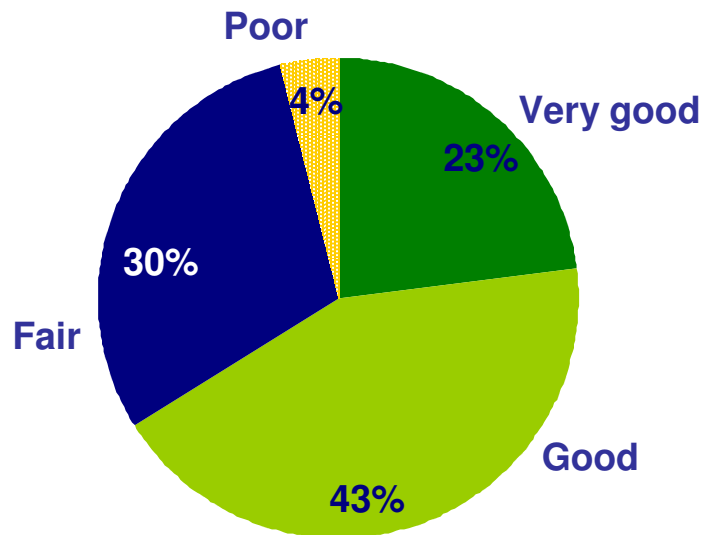


Current State or Condition of Facilities By Geography

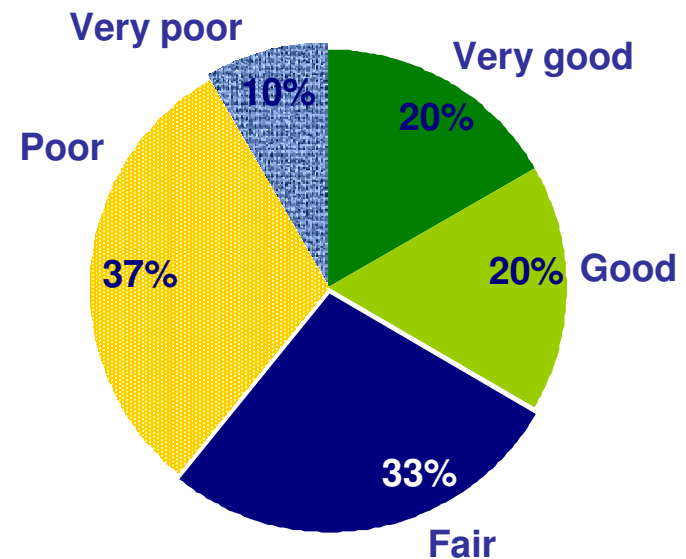
% organizations who rate their facilities as ...

(base: all single use facilities Toronto n=138 and Outside Toronto n=91)

Toronto



Outside Toronto



Calculated on aggregate number of responses, rather than responses ,excludes, ratings of multipurpose facilities

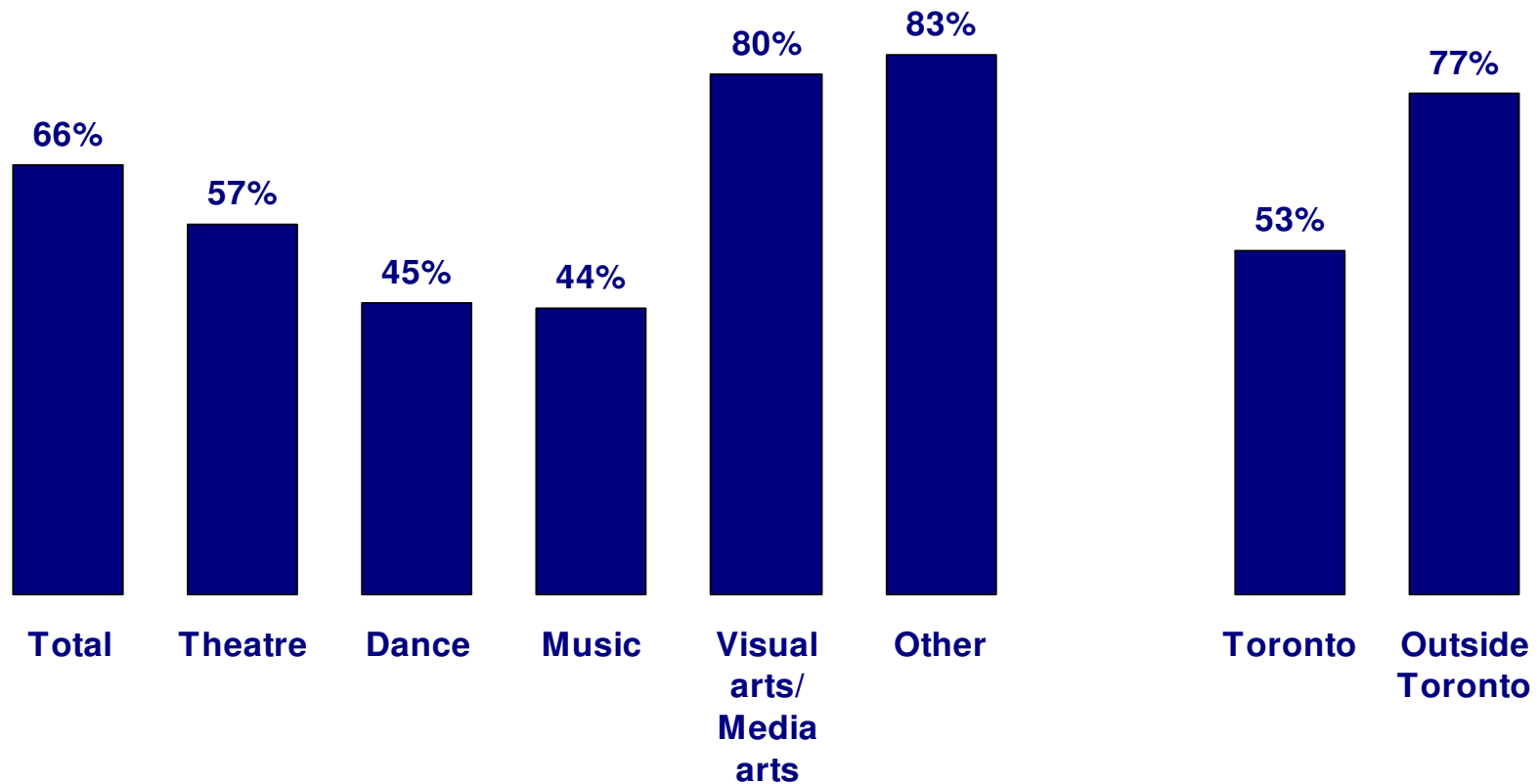
Q13 Please rate the general state/condition of this facility for your organization's needs.



Arts organizations that work in a multi-use facility

Two-thirds of arts organizations use a multi-use facility. This is most common among visual, media arts and “other” organizations. These types of facilities are more prevalent outside of Toronto.

% who use a multi-use facility



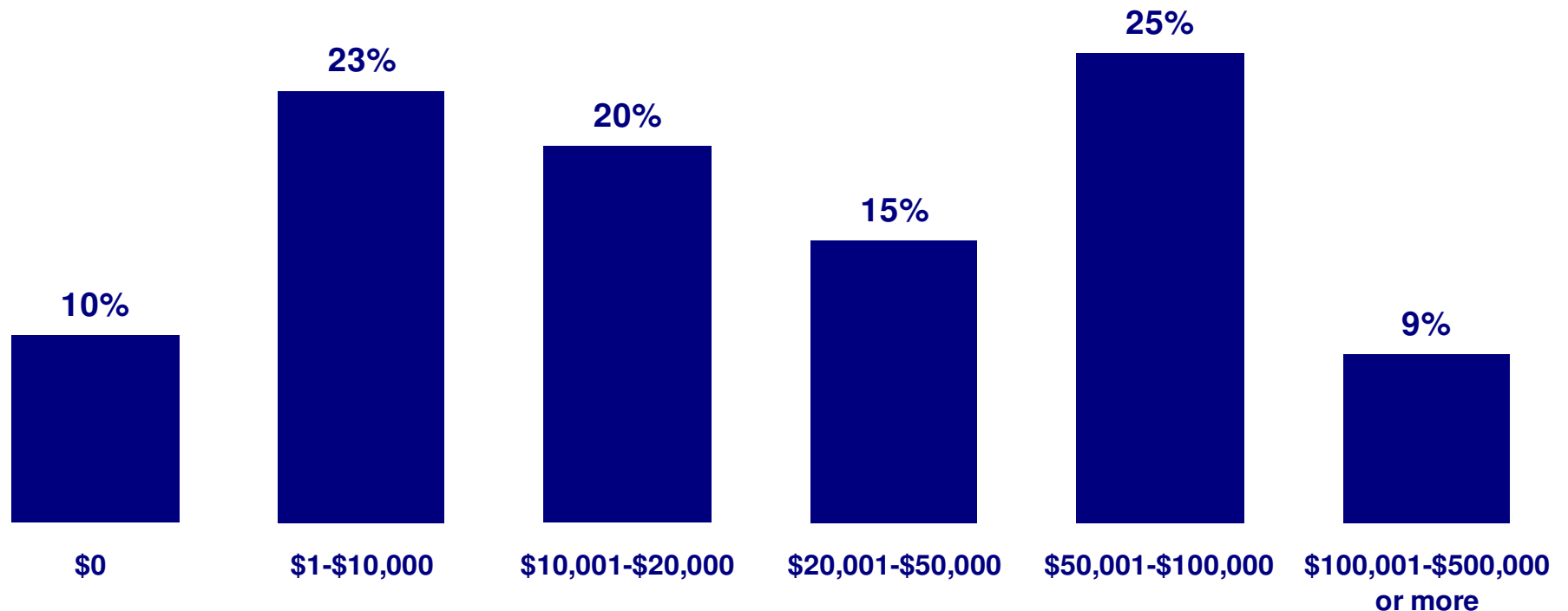
A multi-use facility in this study refers to a facility used by one arts organization for at least two of administrative, rehearsal, storage or performance / presentation space.



Total repair and upkeep on owned facilities in 2004/2005

Organizations spent a cumulative total of \$2.2 million on repairs and upkeep for owned facilities in 2004-2005 – half organizations spent \$14,998 or less (median).

	Mean (incl. 0)	Mean (excl. 0)	Median
Total (n=40 owned facilities with a listed address)	\$55,989	\$62,210	\$14,998



Q19. What were the total costs for any repairs and upkeep conducted at this facility in the 2004/2005 fiscal year? Base: Owned facilities where address has been listed (n=40)



Facility Needs Assessment Survey ArtsBuild Ontario

Final Overview Report: Prepared by Ipsos Reid

October 2006