



Facility Needs Assessment Update Survey

ArtsBuild Ontario



Final Report: Prepared by Ipsos Reid

February 2010



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Background: ArtsBuild Ontario

- ArtsBuild Ontario (ABO) addresses the long-standing capital infrastructure needs of visual and performing small and mid-sized arts organizations through:
 - EDUCATION - design and delivery of innovative training programs, workshops and educational resources (newsletters, online materials)
 - INFORMATION - assembling and sharing information around capital projects through surveys and databases
 - SOLUTIONS - increasing knowledge about best practices in capital funding from multiple sectors and jurisdictions
- ABO Advisory Committee represents over 650 constituent organizations across the province.
- ABO Board has expertise in public and private sector finance, real estate development, the arts and facilities management.

ARTSBUILD ONTARIO ADVISORY COMMITTEE

Artist-Run Centres and Collectives
of Ontario

Canadian Music Centre

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

Theatre Ontario

Toronto Alliance for the
Performing Arts

ArtsBuild Ontario is grateful to
The Ontario Trillium Foundation,
the Ontario Arts Council, the
Department of Canadian Heritage
and the Government of Ontario for
their support of this research
project.





Background: 2006 Facilities Needs Assessment

- In 2006, in association with the Ministry of Culture, the Department of Canadian Heritage, The Ontario Trillium Foundation and the Ontario Arts Council, ArtsBuild Ontario commissioned Ipsos Reid to conduct the first Facilities Needs Assessment Survey.
- The 2006 survey:
 - Was directed only at the province's small and mid-sized arts organizations that owned or leased facilities.
 - Collected basic information around the current condition of these arts facilities and estimated the size of future capital needs.
 - Was the first quantitative assessment of the scope of need in this sector.
- 2006 survey findings were shared with all levels of government and became a valuable information and policy resource.



Background: 2009 Research Objectives

- The 2009 survey was again developed in association with The Ontario Trillium Foundation, the Ontario Arts Council, the Department of Canadian Heritage and the Ministry of Culture, and was designed to:
 - Update and streamline the information collected in the 2006 survey
 - Develop a comprehensive information set by including all organizations
 - Focus on organizations' infrastructure planning over the next three years
 - Explore the sector's knowledge of and experience with capital financing and partnership options

- Survey topics included:
 - Current access to facilities and how they are used
 - Ownership structure of existing facilities (owned / leased)
 - Age and condition of facilities
 - Need for facility upgrades and other capital expenditures
 - Capital expenditure planning over the next three years
 - Knowledge of capital financing options and the range of partnerships



Methodology

- This report is based on a survey of the province's visual & performing arts organizations conducted by Ipsos Reid on behalf of ArtsBuild Ontario.
- 608 small, mid and large arts organizations operating in Ontario were invited to participate in an online survey fielded between September 30 and November 27, 2009.
 - "Small" and "mid-sized" organizations have annual operating budgets of less than \$3 million.
 - The survey was provided in both official languages.
- The survey was directed at organizations that own or lease facilities. Organizations that rent facilities exclusively were screened.
 - Roughly 40% of the original sample (241 organizations) were found to only rent facilities.*
- 105 of the remaining 367 qualified arts organizations participated in the survey for a 29% response rate.
- 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.

** In addition to 44 organizations that self identified in the survey as renting facilities exclusively, ArtsBuild Ontario identified an additional 197 organizations that neither lease nor own facilities.*



Sample Composition

- For reporting purposes arts organizations have been grouped into 3 overall disciplines¹:
- Performing Arts (theatre, dance, music)
 - Visual and Media Arts
 - Multi-disciplinary arts and other¹

	Number of completed surveys
All organizations surveyed	105
BY DISCIPLINE	
Performing Arts	45
Visual Arts / Media Arts	40
Multi-disciplinary / Other	20
BY REGION within ONTARIO	
Based in Toronto	41
Based outside of Toronto	64
BY LANGUAGE	
English	103
French	2

¹ Other includes "Arts Education, "Improv Comedy", "Dance Archives", "Cabarets" and "Various"



Executive Summary / 1

GAPS IN EXISTING CULTURAL INFRASTRUCTURE

- Nearly three-quarters (72%) of organizations report lack of access to facility space.
 - Half (54%) report lack of access to public presentation space.

CAPITAL EXPENDITURES PLANNED / NEEDED

- Three-quarters (74%) of arts organizations plan at least one capital expenditure in the next 3 years. The total number of projects planned is 260.
 - Two in ten (19%) plan to build or purchase a new facility or acquire land to build on) in next 3 years. The total number of projects is 25.
 - Two-thirds (67%) plan capital improvements to existing facilities (e.g. building renovations, additions or extensions, accessibility improvements, systems upgrade, greening projects) in the next 3 years. The total number of projects is 235.

AGE AND HERITAGE STATUS OF EXISTING FACILITIES

- Half (54%) of the facilities used by arts organizations are 70 years old or older.
 - Three in ten (29%) are located in heritage buildings.

IMPACTS AND BENEFITS OF CAPITAL EXPENDITURES

- Organizations planning a capital expenditure in the next 3 years indicate that their project will result in:
 - Increased programming (58%) and revenue (67%)
 - Better working conditions for staff (73%)
 - Attract an increased number of tourists (53%)
- Seven in ten (71%) indicate that their project will contribute to the economic development of the local area.
 - Half (53%) indicate that it will result in more jobs for the community.

** Tourists are defined as audience members that come from out of town, i.e., travel more than 40 km to attend / visit.*



Executive Summary / 3

KNOWLEDGE AND USE OF FINANCING OPTIONS

- Over half of arts organizations say they are knowledgeable about long terms loans (57%) or bridge financing (52%).
- Fewer (34%) are knowledgeable about partnerships with private enterprise or commercial developers.
- Only one-third or less have ever used any of these three financing options.
 - 69% or more have not used these financing options because they have not had a capital project that needed or would be suited to these.
 - 12% - 17% don't know about these options.
- More than half are likely to pursue one of these financing options in the future.
 - The option that they are most interested in both pursuing and learning about is partnerships with a private partner.

Gaps in the existing cultural infrastructure inventory

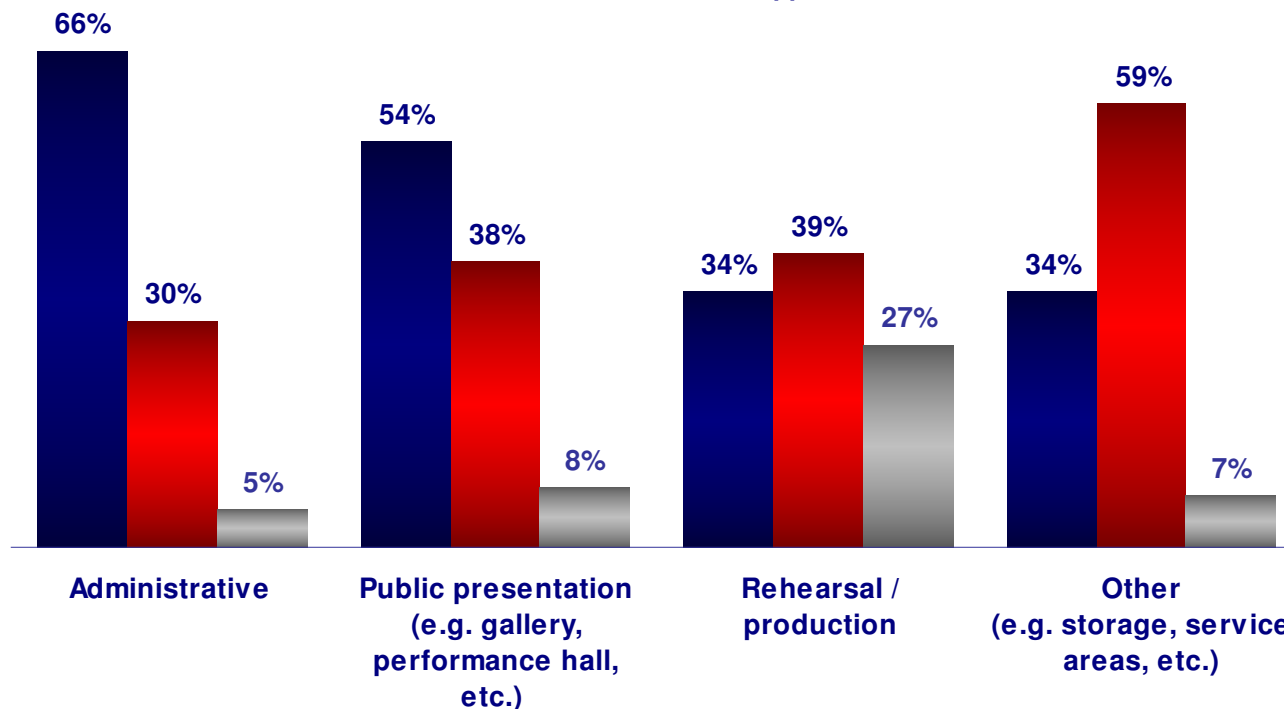
Current Access to Facilities

Overall, almost three-quarters (72%) of arts organizations report having insufficient access to at least one type of space that meets their needs. Specifically, 30% to 40% of organizations report not having sufficient space for each of administration, public presentation or rehearsal/production. A relatively larger proportion (59%) report not insufficient space for storage, service areas, etc.

Among all respondents ...

% that report sufficient access to the following types of space

■ Yes ■ No ■ not applicable



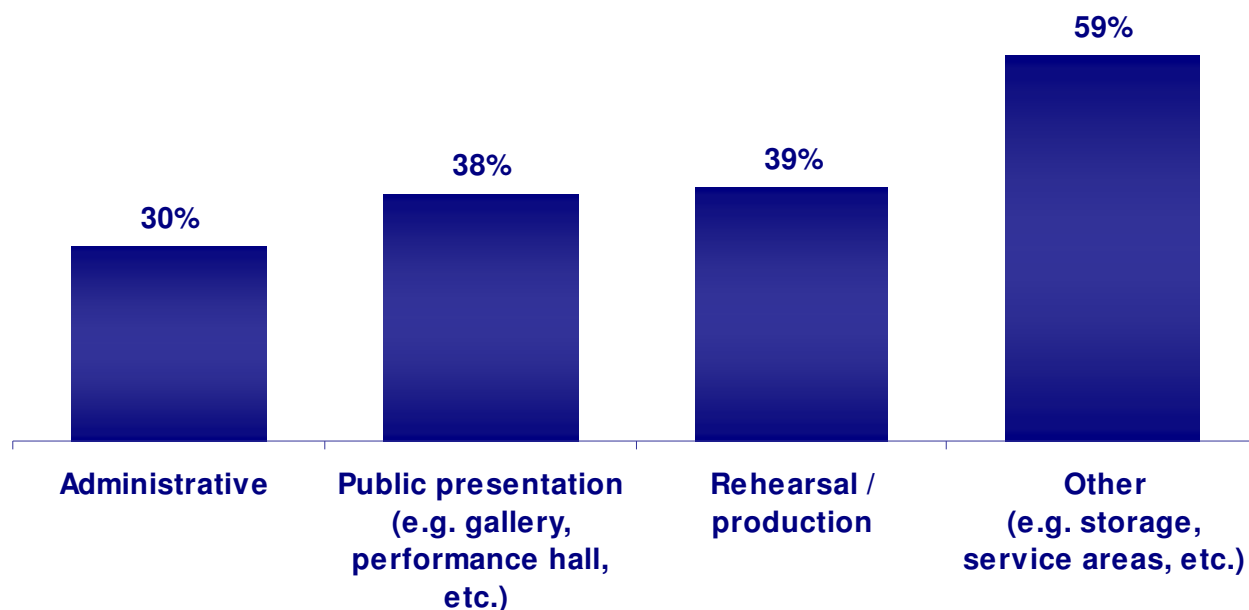


Gaps in the Existing Cultural Infrastructure Inventory

Overall, almost three-quarters (72%) of arts organizations report insufficient access to at least one type of space that meets their needs. Specifically, 30% to 40% of organizations report not having sufficient space for each of administration, public presentation or rehearsal/production. A relatively larger proportion (59%) report not having enough space for storage, service areas, etc.

Among all respondents ...

% that report insufficient access to the following types of space



% that report <u>insufficient</u> access to spaces	
One space	21%
Two spaces	20%
Three spaces	21%
All four	10%
Total % that report insufficient access to at least one type of space	72%



Insufficient Access to Facilities by Region and Discipline

Among all respondents ...

	TOTAL	REGION		DISCIPLINE		
		Toronto	Outside of Toronto	Performing Arts	Visual & Media Arts	Multi-Disciplinary / Other
	N=105	N=41	N=64	N=45	N=40	N=20
% with Insufficient access to at least one type of space	72%	66%	77%	67%	77%	76%



Main Reasons for Insufficient Access to Facilities

Those who report insufficient access to space cite a lack of physical space as the primary reason (87%), followed by inability to afford new space (70%), and lack of proper space designed for the purpose (62%).

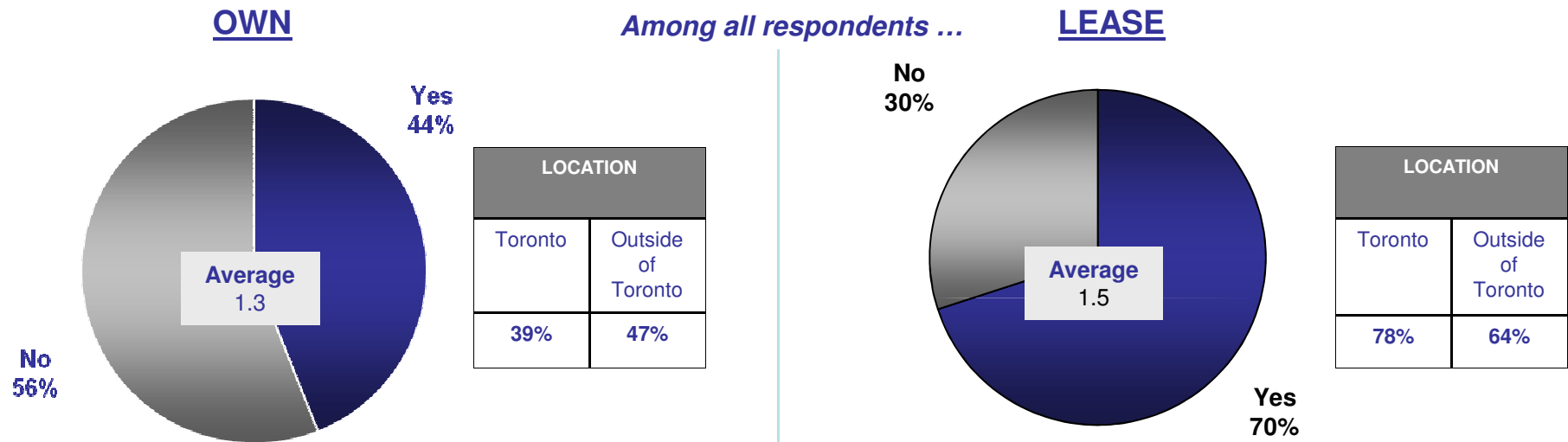
Among those who report insufficient access to each of the following types of space...

	TYPES OF SPACE				
	Total	Administrative	Public Presentation	Rehearsal/ Production	Other (storage/service areas, etc.)
	N=76	N=31	N=40	N=41	N=62
Not enough space in current facilities	87%	74%	100%	68%	79%
Can't afford additional / new space	70%	74%	60%	54%	50%
Current space is not designed appropriately for the purpose	62%	48%	50%	56%	40%
Current space is not conveniently located	34%	23%	18%	12%	27%
Other (please specify)	11%	3%	13%	5%	5%

Ownership structure and age of facilities

Number of Owned and Leased Facilities

Less than half (44%) of the arts organizations surveyed own their own facilities. In contrast, a majority (70%) lease their facilities. A slightly greater proportion of those organizations outside of Toronto own compared to those in the city.



The arts organizations that completed this survey own / lease 160 buildings in total.

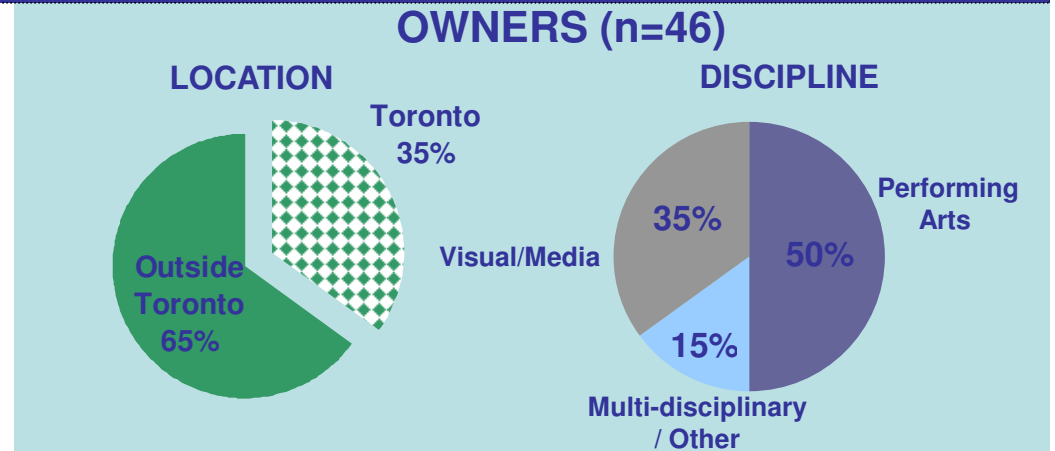
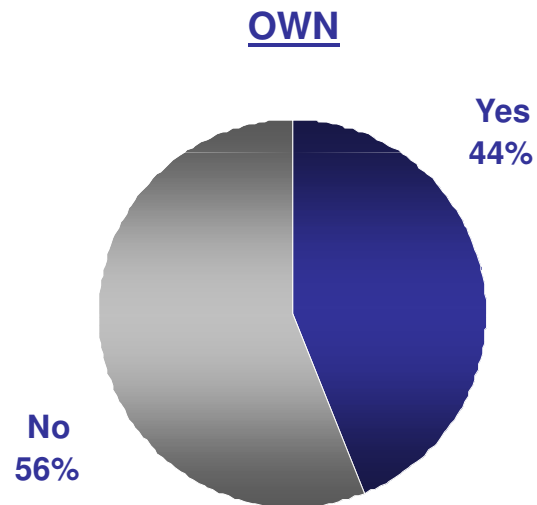
Of these, 29% are in designated heritage buildings.

24% of the buildings were built before 1900, 30% between 1910s and 1940s, 28% between 1950s and 1980s, and 18% were built 1990s or later.



Structure of Owned Facilities

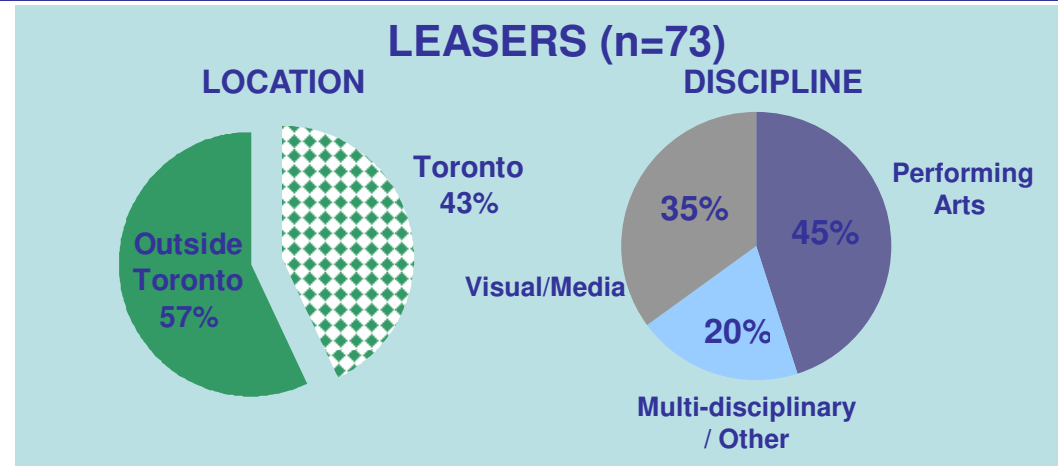
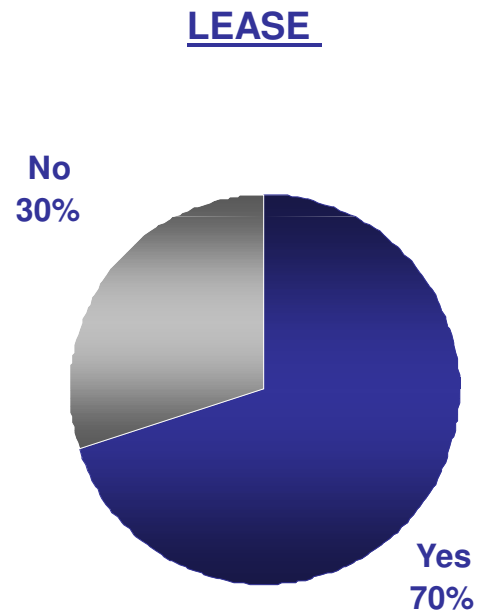
As noted, less than half (44%) of the arts organizations surveyed own their own facilities. The majority of those facilities are outside of Toronto (65%) and exactly half of all owned facilities are for the performing arts (50%), followed by visual arts/ media arts (35%) and multi-disciplinary (15%).





Structure of Leased Facilities

A majority (70%) of organizations lease their facilities with a slightly greater proportion outside of Toronto compared to those in the city. In regards to arts discipline, nearly half of all leased facilities are for the performing arts (45%), followed by visual arts/ media arts (35%) and multi-disciplinary (20%).

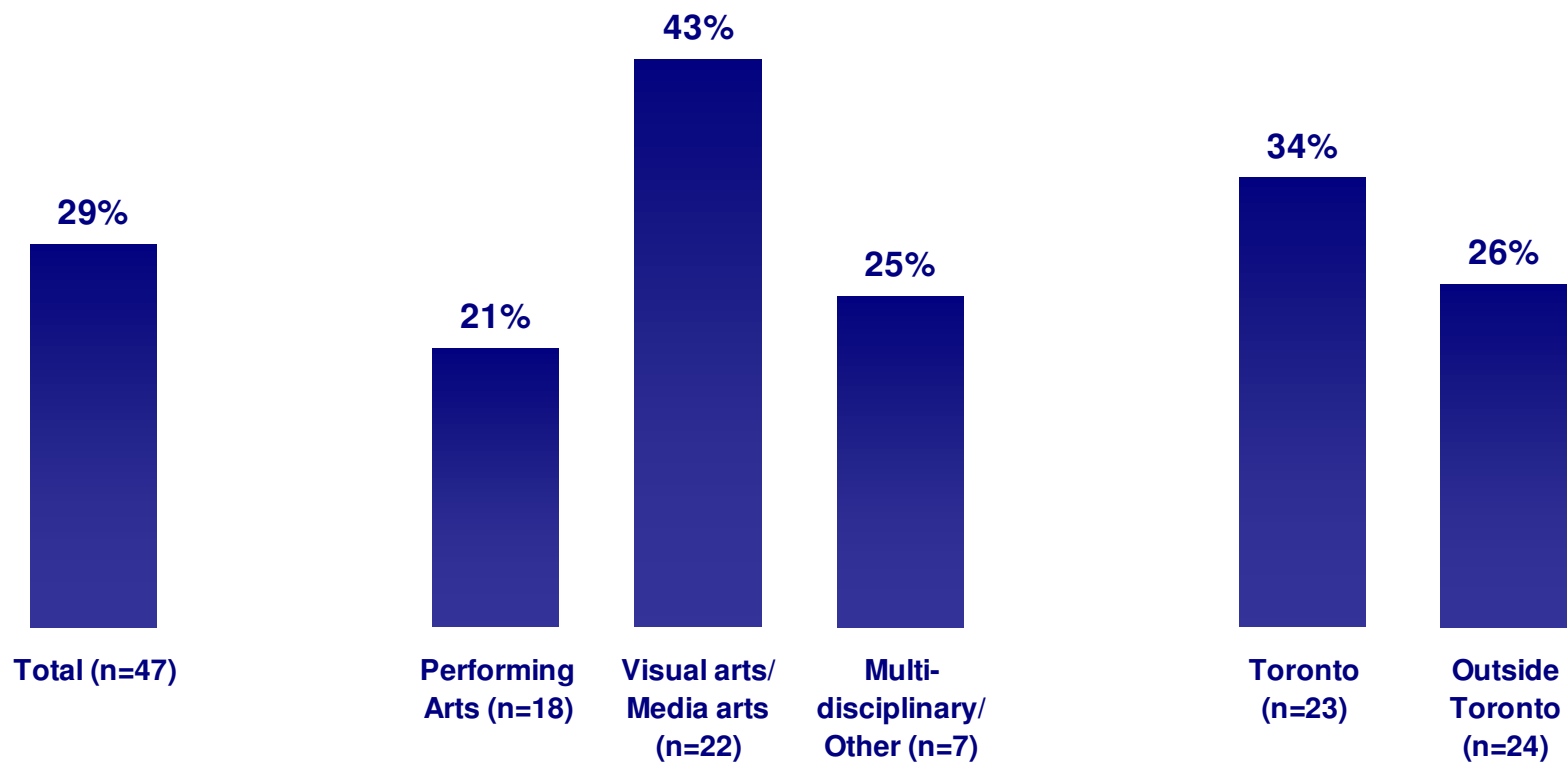




Age and Heritage Status of Facilities

Nearly three out of ten (29%) of all buildings (owned or leased) are located in a heritage building.

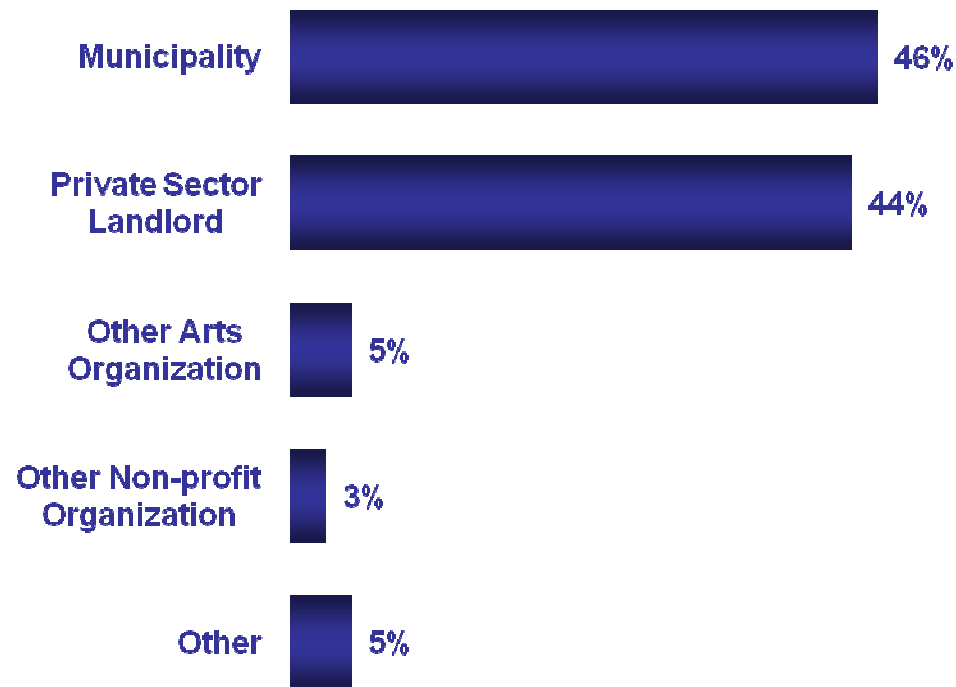
% of facilities located in a heritage building ...





Ownership of Leased Properties that are Planning a Capital Expenditure in Next 3 Years

Organizations which lease and plan at least one expenditure in next 3 years to a facility owned by (n=39) ...



Capital expenditures needed / planned over the next 3 years



Capital Expenditures Needed / Planned for New Facility

One-third (33%) of organizations say they need at least one new facility expenditure including building a new facility, or purchasing a building or land in the next 5 years. One-fifth (19%) of organizations are in the planning stages for at least one of these capital expenditures in the next 3 years.

% NEEDING EXPENDITURE IN NEXT 5 YRS

All Respondents n=105

Build a new
facility



16%

Purchase a
building



23%

Purchase
land



17%

% PLANNING EXPENDITURE IN NEXT 3 YRS

All Respondents n=105



12%



6%



6%

	Need at Least One Expenditure in next 5 yrs	Plan at Least One Expenditure in next 3 years
Total %	33%	19%

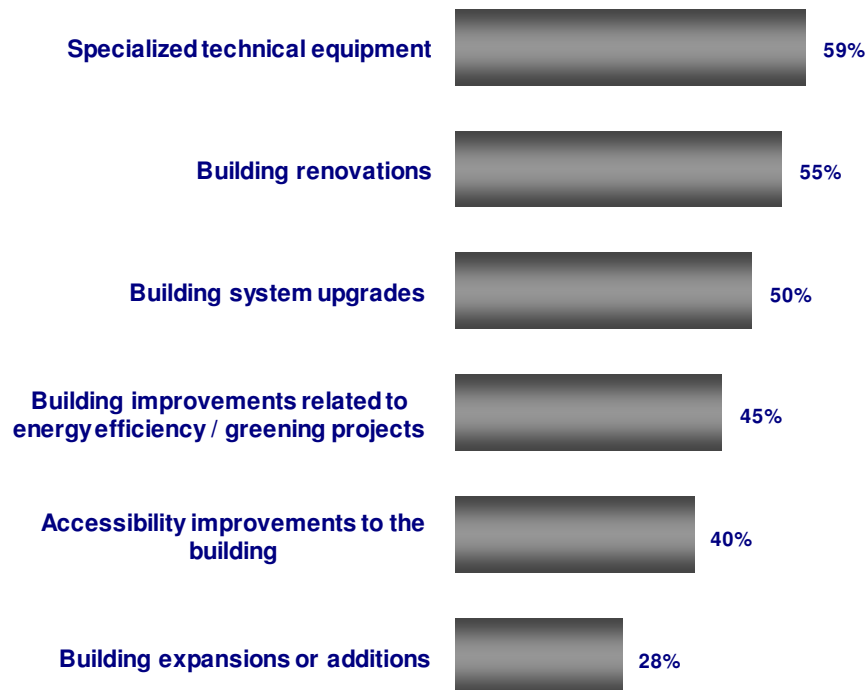


Capital Expenditures Needed / Planned for Existing Facility

Three-quarters (74%) of arts organizations state they need at least one of the six capital expenditures listed below. Many of these (67%) are in the planning stages within the next 3 years.

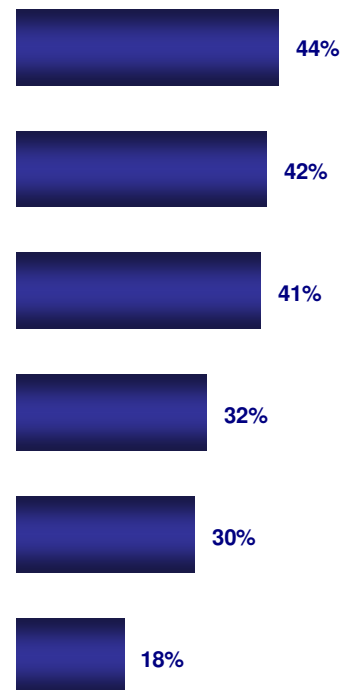
% NEEDING EXPENDITURE IN NEXT 5 YRS

All Respondents n=105



% PLANNING EXPENDITURE IN NEXT 3 YRS

All Respondents n=105



	NEED AT LEAST ONE EXPENDITURE IN NEXT 5 YRS	PLAN AT LEAST ONE EXPENDITURE IN NEXT 3 YEARS
Total %	74%	67%
Average # of expenditures of all organizations (incl. 0)	3.0	2.2

C3. Please identify whether each facility needs the following in the next 5 years? C4. Which of these capital projects are you planning to undertake in the next 3 years?
Base: All respondents n=105



Total Capital Expenditures by Region and Discipline

86% of arts organizations state they need at least one capital expenditure (new or existing facilities) in the next 5 years.
74% state they plan at least one capital expenditure in the next 3 years.

		REGION		DISCIPLINE		
	Total	Toronto	Outside of Toronto	Performing Arts	Visual & Media Arts	Multi-Disciplinary / Other
	N=105	N=41	N=64	N=45	N=40	N=20
% NEEDING at least one <u>new facility capital expenditure</u> in next 5 years	33%	24%	39%	38%	30%	30%
% NEEDING at least one <u>existing facility capital expenditure</u> in next 5 years	74%	71%	77%	71%	73%	85%
Total combined % NEEDING at least one capital expenditure in next 5 years	86%	81%	89%	82%	85%	95%
% PLANNING at least one <u>new facility capital expenditure</u> in next 3 years	19%	12%	23%	18%	22%	15%
% PLANNING at least one <u>existing facility capital expenditure</u> in next 3 years	67%	63%	69%	64%	65%	75%
Total combined % PLANNING at least one capital expenditure in next 3 years	74%	66%	80%	69%	78%	80%



Cost Estimates for Expenditures Planned in the Next 3 Years

% PLANNING CAPITAL EXPENDITURE IN NEXT 3 YRS

All Respondents n=105

TOTAL # OF PROJECTS PLANNED

COST OF ESTIMATES

(among those whose project is far enough along to
have a quote and were able to provide it)

Build a new facility 12%

Purchase a building 6%

Purchase land 6%

25

Based on 7 projects

Mean \$7,057,000

Specialized technical equipment 44%

Building renovations 42%

Building system upgrades 41%

235

Based on 178 projects

Mean \$497,131

Building improvements related to energy
efficiency / greening projects 32%

Accessibility improvements to the
building 30%

Building expansions or additions 18%

If the extremely large projects over \$10 million
planned by large arts organizations are removed, we
are left with 157 projects

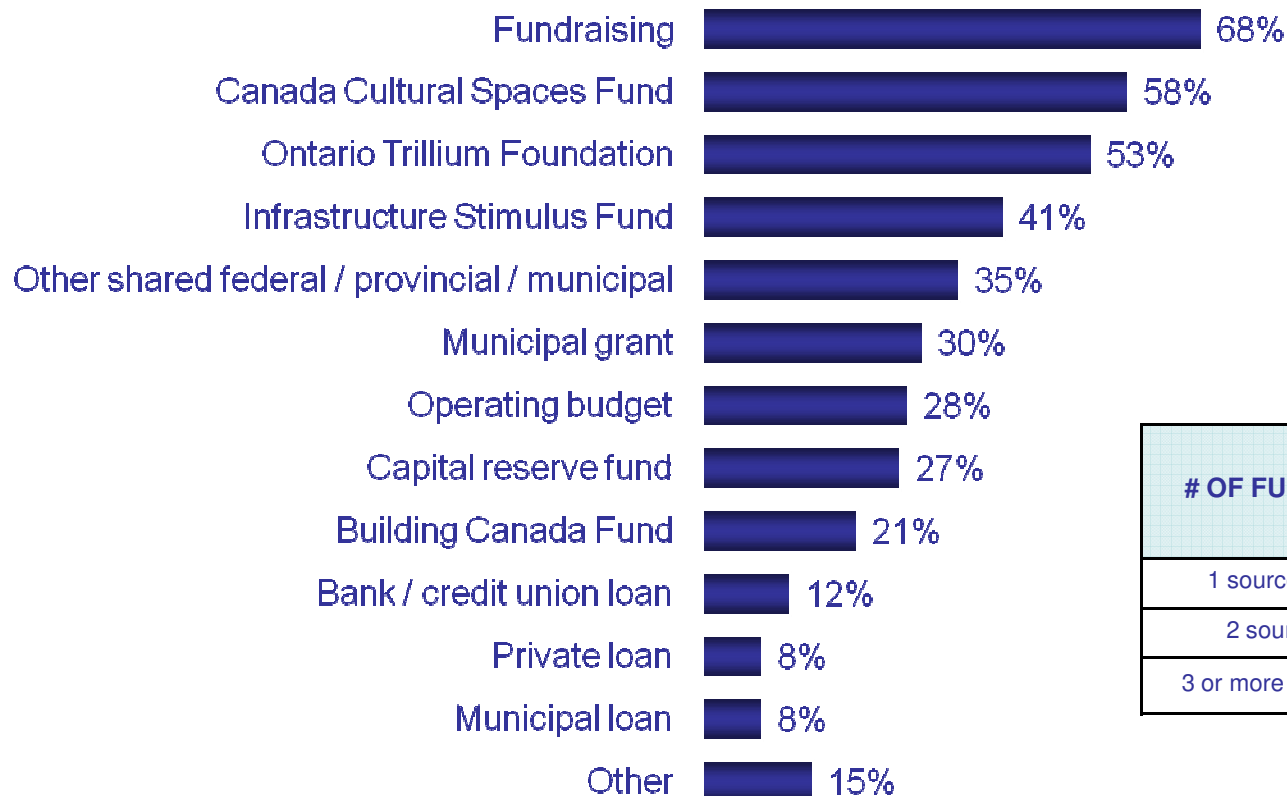
Mean \$183,625



Anticipated Sources of Funding

A majority of arts organizations anticipate fundraising (68%) will be the primary way of funding their capital expenditures. Other top funding sources include Canada Cultural Spaces Fund (58%), The Ontario Trillium Foundation (53%) and the Infrastructure Stimulus Fund (41%). Overall, a majority of arts organizations (72%) use multiple funding sources to meet their funding needs.

Among those organizations planning any type of expenditure in next 3 years (n=78) ...



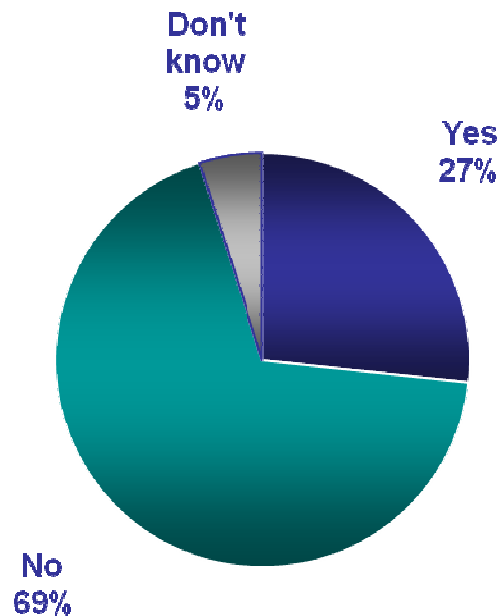
# OF FUNDING SOURCES USED	
1 source only	13%
2 sources	15%
3 or more sources	72%



Capital Reserve Funds

One quarter (27%) of all organizations have a capital reserve fund. Of these, the average current value is \$264,100.

Among all respondents ...



Among those who have capital reserve fund ...	TOTAL
	N=28
Mean (Average)	\$264,100

E3. Does your organization have a capital reserve fund? By capital reserve fund, we mean a reserve fund intended for major capital expenditures such as new building construction, building renovations, major repairs and specialized technical equipment, etc.

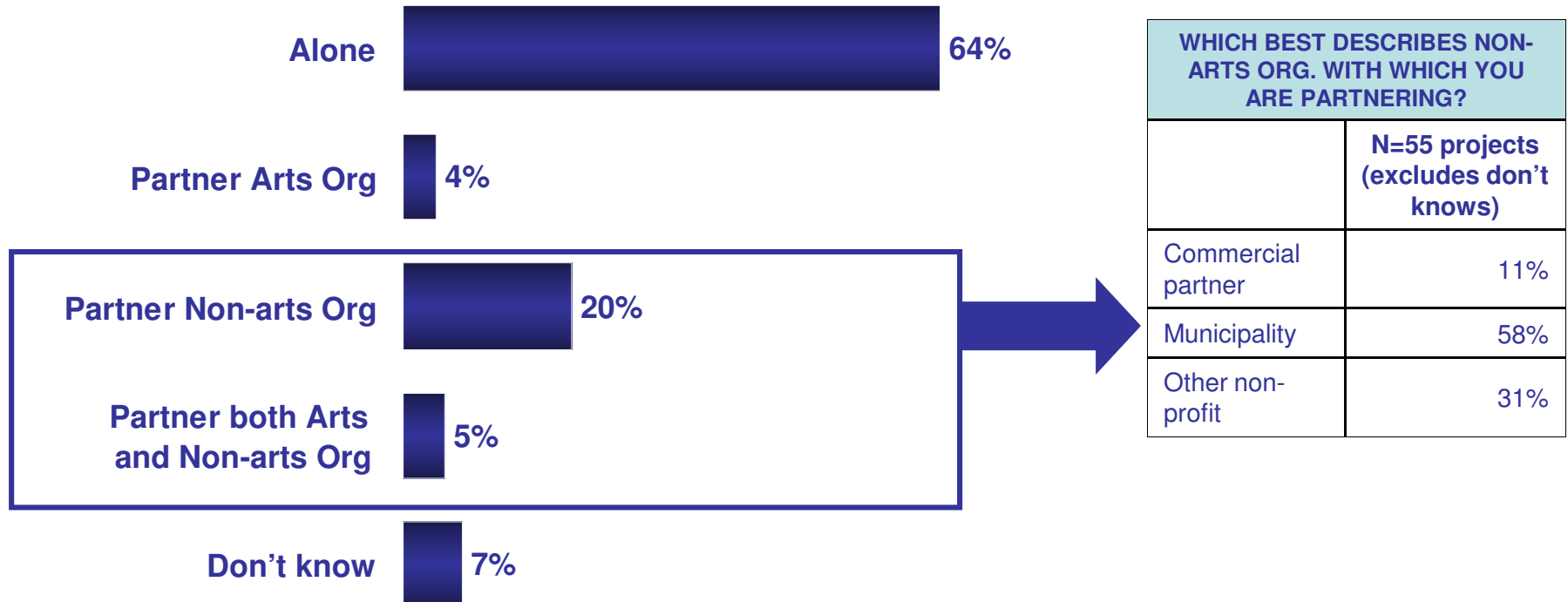
E4. What is the current value of your organization's capital reserve fund? Please enter a whole number, without any commas, decimals or other characters.



Type of Partnership for Planned Capital Expenditure

For all the capital projects planned in the next 3 years, 64% are planned alone, while 29% are planned in partnership with both arts and non-arts orgs.

*Total planned number of all expenditures in next 3 years
for new and existing facilities, up to 3 projects listed only (n=235)*





Planning Stages for Capital Expenditures on New Facilities

Of the new facility expenditures planned, half to two-thirds are still in the pre- or early planning stages.

Planned expenditures for new facilities n=25

■ Pre / early planning ■ Early feasibility ■ Feasibility almost complete ■ Final planning / ready to go

Build a new facility (n=13)



Purchase a building (n=6)



Purchase land (n=6)





Planning Stages for Capital Expenditures on Existing Facilities

Organizations are slightly further along with capital expenditures for existing facilities, when compared to those for new facilities .

Planned expenditures for existing facilities n=235

■ Pre/early planning ■ Early feasibility ■ Feasibility almost complete ■ Final planning / ready to go

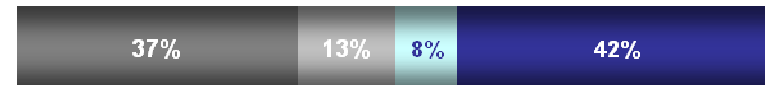
Specialized technical equipment (n=48)



Building renovations (n=48)



Building system upgrades (n=48)



Building improvements related to energy efficiency / greening projects (n=37)



Accessibility improvements to the building (n=33)



Building expansions or additions (n=21)

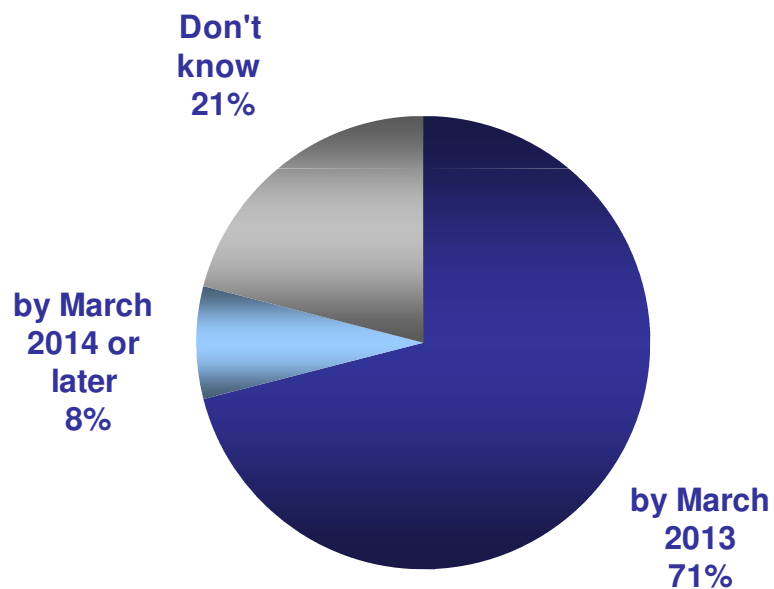




Expected Project Completion Timeline

Almost three-quarters of all projects planned in the next three years are expected to be completed by March 2013. Very few (8%) are due to be finished by March 2014 or later.

Completion timeline for total planned number of all (large and small) expenditures in next 3 years (n=260)



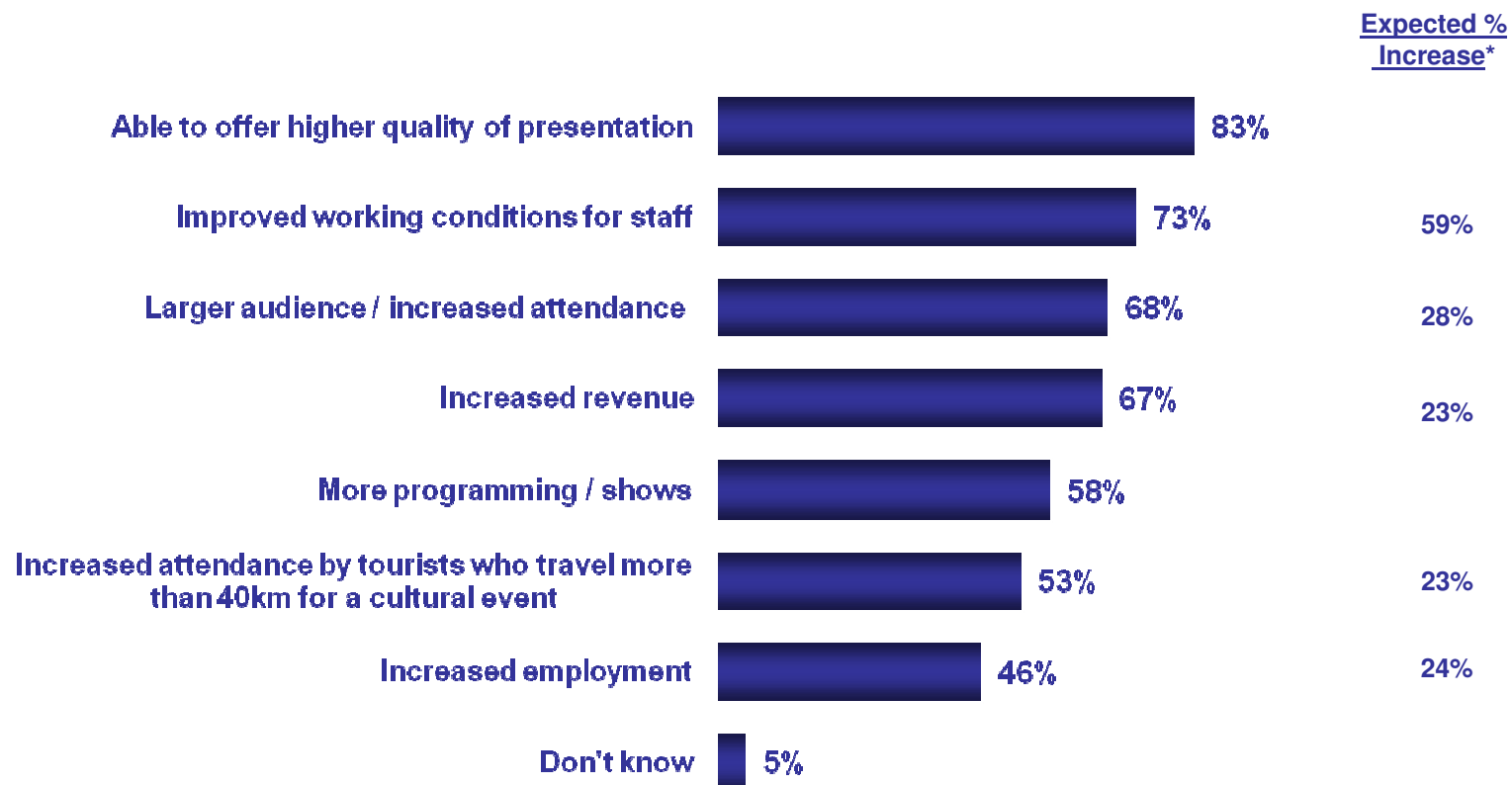
Impacts and Benefits of Capital Expenditure



Project Impact upon Organization

The majority of arts organizations expect that their capital projects will allow them to offer higher quality of presentation (83%), and improved working conditions for staff (73%). Larger audience / increased attendance (68%) and increased revenue are also expected benefits (67%).

Among those organizations planning any type of expenditure in next 3 years (n=78) ...



B9. In which of the following ways do you expect your capital project will affect your organization? If you don't know the specific percentage, please leave blank.

C10. In which of the following ways do you expect the project(s) for your owned and/or leased facility will affect your organization? If you don't know the specific

percentage, please leave blank. * **Expected percentage increase based on those who provided an answer – bases can vary by expenditure where spaces left blank – directional only.**



Project Impact upon Community

A substantial proportion say their capital projects will impact their community by helping increase their contribution to local economic development (71%) and helping enhance the region as a cultural tourism destination (62%). The capital projects will also enable them to offer more cultural activities to the general community (68%) and specifically for youth (64%) and specifically for youth (64%).

Among those organizations planning any type of expenditure in next 3 years (n=78) ...



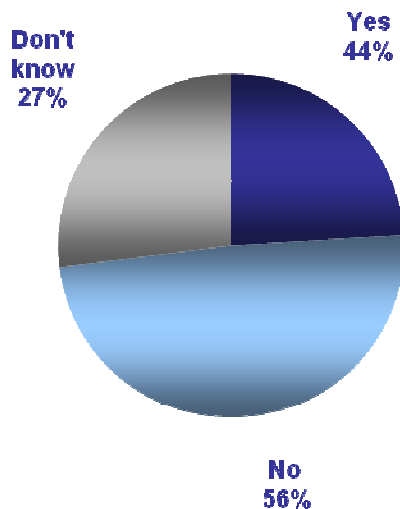


Relationship of Project to Municipal / Provincial Initiatives

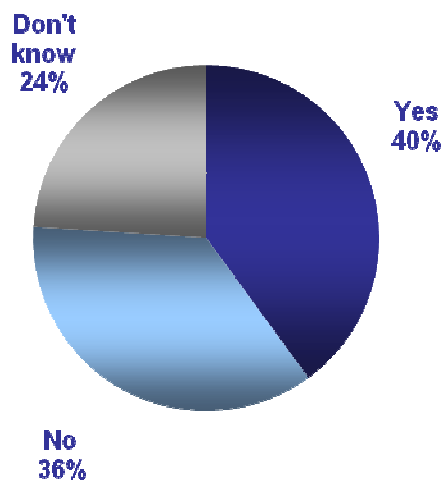
Nearly half of organizations planning a capital expenditure indicate that their project(s) is part of their municipality's culture plan. Slightly fewer feel their project will help move forward a larger revitalization project. Only 5% involve brownfield redevelopment.

Among those organizations planning any type of expenditure in next 3 years (n=78) ...

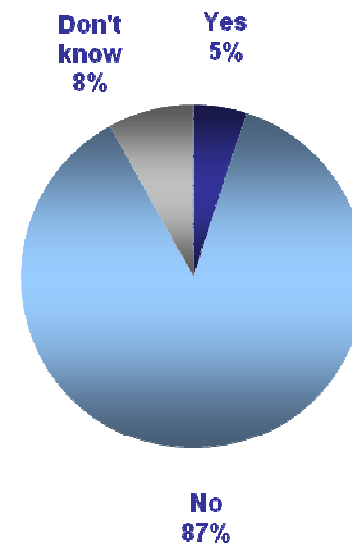
Project part of your municipality's cultural plan



Project will help move forward a larger revitalization project



Project involves brownfield redevelopment

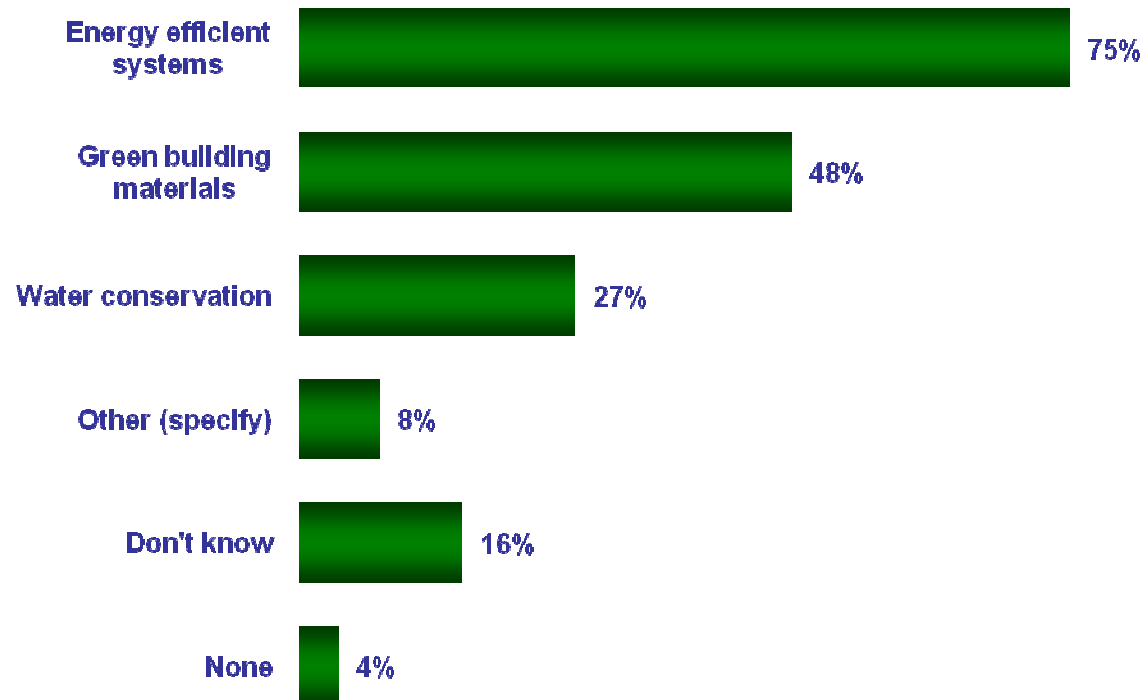




Green Initiatives for Planned Expenditures

Those that are planning to build a new building or other capital expenditures intend to incorporate greening measures: three-quarters (75%) plan on installing energy efficient systems; half (48%) plan on using green building materials; and a quarter (27%) plan on including ways to conserve water.

Among those organizations planning to build a new facility or plan other capital expenditures in next 3 years (n=77) ...



Knowledge of Capital Financing Options



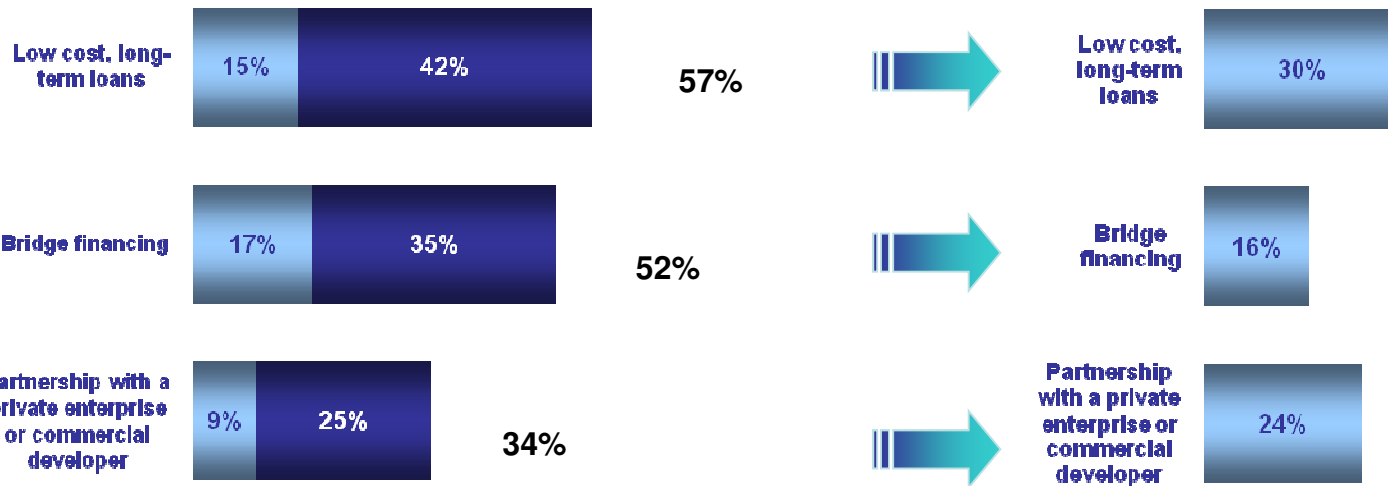
Knowledge and Use of Financing Options

Over half of arts organizations say they are knowledgeable about long term loans or bridge financing. Few are knowledgeable about partnerships with private enterprise or commercial developers. Only one-third or less have ever used any of these three financing options.

Among all respondents ...

■ Very knowledgeable ■ Somewhat knowledgeable

% of organizations which have ever used one of the following methods of financing



	LOCATION		OWNERSHIP	
Top 2 Box %	Toronto	Outside TO	Own	Lease
	N=41	N=64	N=46	N=73
Low cost, long term loan	44%	66%	65%	52%
Bridge Financing	44%	58%	67%	45%
Partnership with private	29%	38%	39%	34%

LOCATION		OWNERSHIP	
Toronto	Outside TO	Own	Lease
N=41	N=64	N=46	N=73
24%	33%	44%	26%
12%	19%	24%	16%
22%	25%	30%	21%

D1. There are a variety of ways to finance capital projects. These include government grants, capital reserve funds, donor support through fundraising, institutional financing such as bridge financing and low cost, long term loans as well as private partnerships with commercial enterprise. D2. Has your organization ever...Base size: All Respondents n=105



Reasons for Not Using Financing Options

Many state that the most common reason they have never used low cost loans, bridge financing or partnerships is because they never had a capital project that needed or would be suited to any of these options.

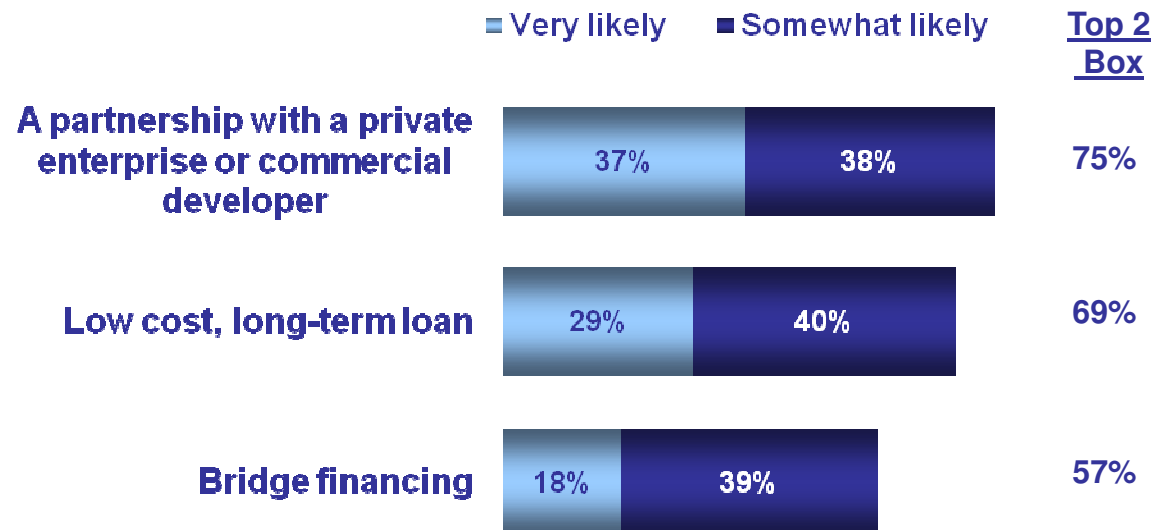
<i>Among all respondents ...</i>	OBTAINED A LOW COST, LONG-TERM LOAN	USED BRIDGE FINANCING	PURSUED A PARTNERSHIP WITH A PRIVATE ENTERPRISE OR COMMERCIAL DEVELOPER
	N=74	N=88	N=80
% that have NOT used the following finance options	70%	84%	76%
<i>Reasons why they did not use:</i>			
Never had a capital project that needed or would be suited to...	69%	71%	70%
Don't know anything about...	12%	17%	15%
Didn't think we could get approved so didn't try (long term loan). Didn't think bridge financing was a good idea. Didn't think we could find a suitable partner.	10%	8%	18%
Tried but could not get approved (long term loan). Unable to secure bridge financing. Tried, but not could not find a partner to do the deal with.	3%	5%	5%
Don't have the skills the arrange a low cost, long term loan. Don't have the skills to arrange bridge financing. Don't have the skills to negotiate with a private partner	4%	1%	11%
Other	12%	13%	9%



Likelihood to Pursue Financing Options

Three-quarters of respondents say they are likely to pursue a partnership with a private enterprise or commercial developer. A similar proportion say they are likely to pursue low cost, long term loans. Fewer are interested in bridge financing.

Among all respondents ...

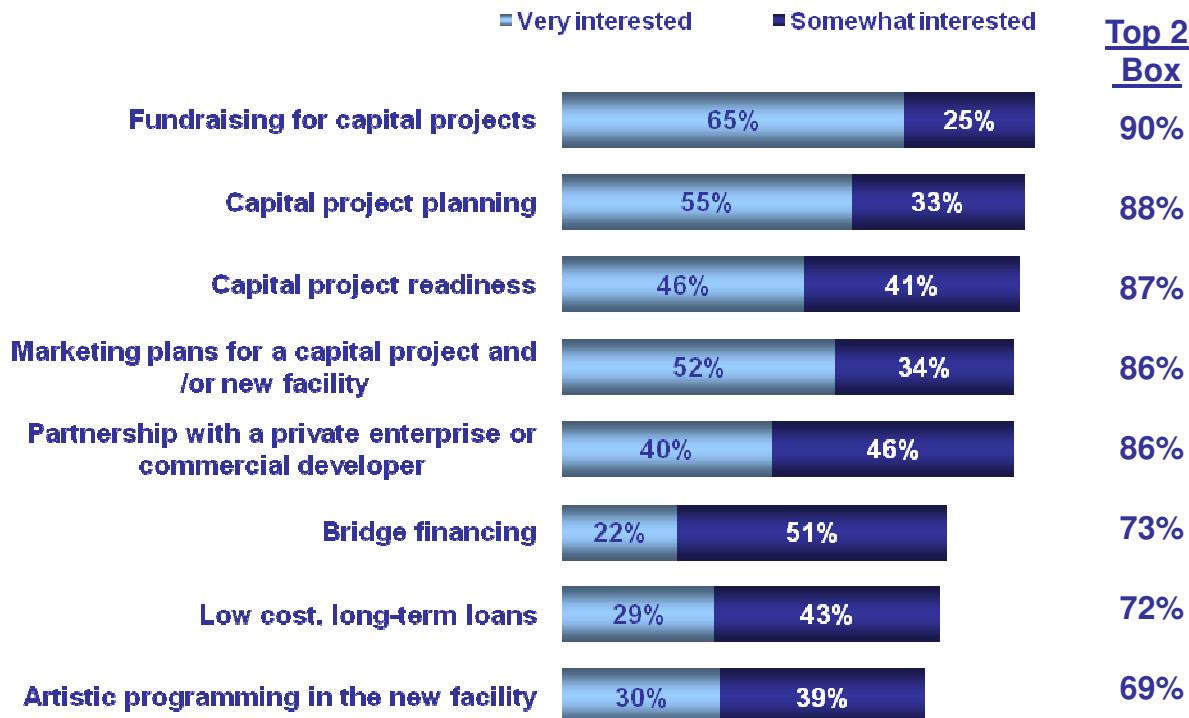




Interest in Learning About Types of Financing & Capital Related Topics

The majority of respondents are interested in learning more about many aspects of financing and capital project related topics, including fundraising, project planning and readiness, marketing plans and partnerships with private enterprise or commercial developer. Communication methods most preferred include one-on-one coaching / mentoring, a dedicated website and workshops.

Among all respondents ...



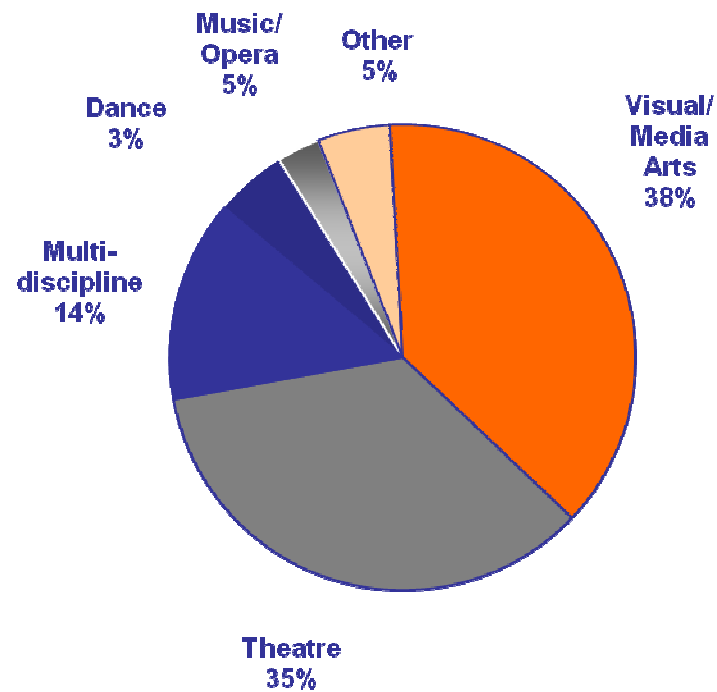
	METHOD MOST PREFERRED TO ACCESS INFORMATION
Among orgs. very/somewhat interested in at least one topic	N=99
One-on-one coaching/mentoring	28%
Online through a dedicated website	27%
Workshops	26%
Email newsletters / bulletins	16%
Other	2%

Profile of Participating Organizations

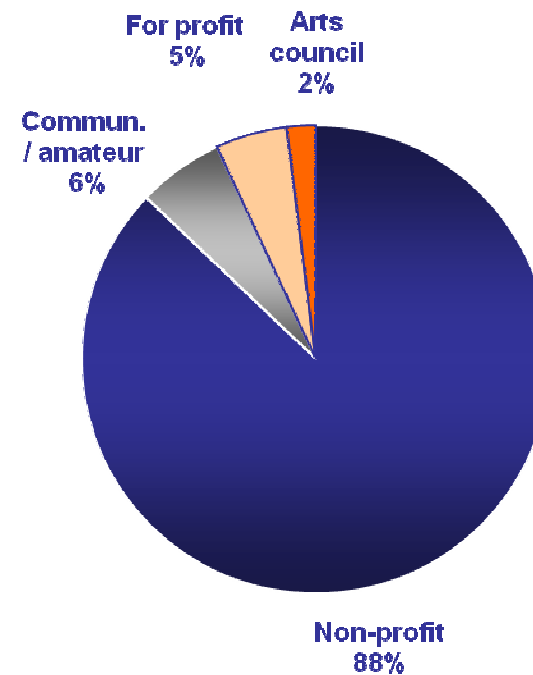
Types of Arts Discipline and Organization

Among all respondents ...

ARTS DISCIPLINE



TYPE OF ORGANIZATION





2007 / 2008 Fiscal Year Information: All Organizations

ALL ARTS ORGANIZATIONS (N=105)	PERCENTAGE	MEAN	MEDIAN
Total full-time equivalent staff (one outlier removed – respondent emailed they have volunteer staff)	1 to 10 staff: 81% 11 to 50 staff: 13% 51-150 staff: 4% Over 150 staff: 3%	17.7	3
Total revenue	Under \$250K: 36% \$250K to under \$500K: 24% \$500K to under \$1M: 15% \$1M to under \$3M: 16% \$3M or over: 9% Don't know: 1%	\$2,631,601 (exc. don't now)	\$400,421
Total number of public activities (exhibitions, performances including readings, community arts events, etc.)	1 to 10: 18% 11 to 50: 38% 51 to 100: 18% 101 to 500: 22% Over 500: 4%	255	39
Total public attendance at public activities / events	-	39,498	9,625
Percentage of audience / attendance that typically comes from out of town	-	19%	10%

E8. Please provide the following data from your 2007/08 fiscal year.



2007 / 2008 Fiscal Year Information: Small & Mid-Sized Organizations

Note: Removed outliers - arts organizations with total revenue of \$3 million or more (total 9 organizations removed)

ARTS ORGANIZATIONS WITH REVENUE UNDER \$3 MILLION (N=96)	PERCENTAGE	MEAN	MEDIAN
Total full-time equivalent staff (one outlier removed – respondent emailed they have volunteer staff)	1 to 10 staff: 88% 11 to 50 staff: 11% 51-150 staff: 1%	6	3
Total revenue	Under \$250K: 40% \$250K to under \$500K: 26% \$500K to under \$1M: 17% \$1M to under \$3M: 18% Don't know: 1%	\$583,867 (exc. don't now)	\$362,000
Total number of public activities (exhibitions, performances including readings, community arts events, etc.)	1 to 10: 20% 11 to 50: 41% 51 to 100: 17% 101 to 500: 21% Over 500: 2%	254	35
Total public attendance at public activities / events	-	19,330	9,313
What percentage of your audience / attendance typically comes from out of town	-	17.5%	9%



Facility Needs Assessment Update Survey

ArtsBuild Ontario



Final Report: Prepared by Ipsos Reid

February 2010