

**PATTERNS OF ATTENDANCE AND CULTURAL PARTICIPATION
BY YOUNG PEOPLE IN THE THEATRE FOR YOUNG AUDIENCES AND
CHILDREN'S FESTIVALS SECTOR IN CANADA**

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INTRODUCTION

1.1 TERMS OF REFERENCE

In Canada, like elsewhere, the arts and culture sector is generally subject to the same kinds of forces that are changing the rest of society. These changes are primarily demographic, sociological, political, economic and technological.

This is the context in which the Canada Council for the Arts wanted to obtain a clearer understanding of the status of youth cultural participation and attendance, particularly in the Canadian Theatre for Young Audiences (TYA) and children's festivals sector.

The objectives of this exploratory research are to produce an analysis of the current situation of this sector across the country while considering the following questions:

- What is the status of audiences for performing arts work that is created, produced and/or presented for young people, their families and educators, specifically in the Theatre for Young Audiences and Children's Festivals sector? Are there differences between the Anglophone and Francophone sectors?
- Do the patterns of attendance and participation in this specialized sector reflect overall societal patterns in youth arts engagement? Is this sector a microcosm of a larger demographic reality?
- What are the identified factors that have an impact on issues of engagement/attendance in youth in general? Are these factors playing out similarly in the arts sector?
- What are the actual or potential impacts on this specialized sector of changes in attendance and participation?

- What are the factors that assist organizations in successfully navigating changes in attendance and participation?

The core research outlined in this report covers two groups operating in this sector: theatre organizations that receive operating funding from the Canada Council, and children's festivals and presenters of young audience series that receive funding from the Department of Canadian Heritage under the Professional Arts Festivals and Performing Arts Series Presenters stream of the Canada Arts Presentation Fund. The research covers both the Anglophone and Francophone segments of this sector.

This research is the first of its type that is national in scope and is considered exploratory. It is not intended to produce recommendations but rather conclusions that have been validated by the various lines of analysis in this study.

1.2 GENERAL APPROACH

This report is the result of an integrated approach designed to produce an analytical description of current patterns of public participation in arts programs for children and youth throughout Canada. This description is obtained by triangulating secondary and primary information. The information used comes from three sources:

- survey and analysis of the relevant documentation;
- analysis of existing quantitative data;
- survey of key stakeholders in the TYA and children's festival sector.

Two approaches were used to study the secondary information. First, literature was reviewed to obtain a clearer picture and understanding of the sector's dynamics, issues and significant trends. Secondly, existing statistical information was analysed to gain perspective on the main parameters that characterize how the sector is evolving, especially in terms of attendance, revenues and expenses.

A very important part of the work was based on interviewing sector stakeholders (artistic directors, general managers, programmers, and communication or dissemination officers) in creation/production companies, specialized or multidisciplinary presenters, and representatives of festivals or other events designed for children or teenagers. We also contacted other key individuals working for associations, institutional partners and other relevant groups in the sector.

Approximately 30 interviews were conducted as well as two focus groups consisting of 15 participants were organized (see list of people consulted in Appendix 1). The main method used for the interviews was email contact systematically followed by an appointment for a telephone interview. Although the interview questions were adapted for each

interviewee, they retained a common structure to preserve the survey's overall coherence (see interview question template in Appendix 2). The interviews were essentially qualitative and were not intended to identify all the situations encountered by the organizations concerned but rather to focus on the audience-related ones. The processing of the data collected was based on two main analytical principles :

- We triangulated the information received as systematically as possible by correlating it with the secondary data in order to validate its significance. When we receive a piece of information, we first refer to the secondary information available. We then complement or modulate the facts reported in light of the comments received, as applicable;
- We applied the principle of information saturation. This means that we did not transcribe all the interviewees' comments but only those corroborated by several informants. In cases where this attempt to achieve a coherent synthesis did not produce a single hypothesis, we describe the various viewpoints noted.

In order to obtain a truly representative picture of the sector under study, we reconciled the various data obtained and looked for coherence in the final analysis of the various realities described. Despite these challenges, we have been able to draw a number of conclusions and highlight features that could very well be indicative of the sector's future prospects.

1.3 THE REPORT'S LIMITATIONS

To our knowledge, this study is the first in Canada that describes the prevailing audience dynamics for TYA and children's festivals across the country. The research encountered several obstacles, some of which are inherent in the object of study: a sector that is actually a sub-sector of a larger discipline – performing arts, which consists of many components, each with its own imperatives that are sometimes difficult to reconcile with those of other components.

This diversity of stakeholders means that one group consists of presenters and festivals that specialize in theatre and which generally respond to the imperatives of dissemination and discipline development. The approach of non-specialized presenters and festivals, on the other hand, is more to offer a variety of disciplines in order to enliven the public space of a particular local community. While both approaches are valid and simply reflect the milieus in which the organizations concerned operate, this factor makes it more difficult to identify common patterns in the overall sector.

With respect to TYA companies, there are clearly two associated presentation realities in Canada as a whole. In Anglophone circles, the circulation of works mainly consists of tours to schools, whereas almost all the productions of Francophone companies are presented in professional performance halls. As a result, these two segments have developed different structures. For example, the average size of Anglophone TYA organizations – at least for the sample targeted for this study – is twice and even three times as large as that of Francophone organizations. It would therefore be risky and even misleading to compare these two realities without taking into account certain contextual factors, such as the fact more Anglophone TYA organizations have their own facilities and operate their own associated schools.

Due to its scope or simply because of certain methodological requirements, another limitation to this report is that it lacks some viewpoints that would have been useful to access.

For a start, it is always a complex task to survey the preferences and interests of populations that are difficult to access – children and youth in this case. As described below, surveys about cultural participation are one of the sources of potential secondary data, but the existing ones do not correspond to the terms of reference for this study in terms of target age groups or cultural activities.

Although it might have been desirable to have included the viewpoints of young people, it must be remembered that adults – either parents or school officials – are essentially the decision-makers for children's cultural participation. In this regard, the viewpoints of these decision-makers are only indirectly included in this report, primarily in the comments from the sector stakeholders interviewed.

There are some companies in Canada that are hybrid in the sense that they create and produce some works for adults and others for young people. Since it is not possible to statistically differentiate these two types of activities, they have not been factored into this report. Nonetheless, this type of hybrid activity could be relatively common, particularly in smaller communities where sometimes only a single organization is responsible for the community's cultural life, including activities for young people. This situation clearly leads to particular challenges, but it was not possible to specifically address these in this report.

This situation applies mainly to Francophone regions of Canada outside Quebec therefore TYA organizations in these regions are not covered in this study. The Francophone viewpoint is primarily expressed by Quebec-based companies since these are the ones that corresponded to the criteria pre-established for the sample in terms of quantitative data and survey information.

Another significant difficulty associated with the research subject is the fact that it overlaps two distinct worlds: the arts and education. Although the origin and primary focus of this research is the arts, it quickly becomes necessary to include the educational system so far as children

and youth are concerned. However, education is an extremely complex dimension to study in Canada, given that it falls under provincial jurisdiction and that educational systems vary from one region to another.

It was necessary to confine the scope of our research to the principal points of contact between the creators, producers and presenters of works for young people and the corresponding resource people in the education community they deal with. As a result, the research did not cover the field of arts education, even though arts classes in schools probably influence young people's receptivity to the artistic activities available to them both in and outside school.

Based on the secondary information available to us, we were thus unable to discern as completely and as accurately as possible the prevailing operational or economic dynamics of audiences for TYA or children's festivals in Canada. The main reasons for this are the incomplete character of our information sources in terms of aspects surveyed and geographical range.

For example, the only two sources of Canada-wide statistical information about TYA and children's festival organizations are the Canada Council and the Department of Canadian Heritage. However, the respective bodies of data from these two sources have been collected for different purposes and apply to different realities, even though they overlap in a few areas.

Most websites of provincial arts service organizations and other regional networks were explored for any reports or other published data. However, the limited mandate of this research project prevented us from contacting each of these sources, following up as required to obtain raw information, and then processing this information in order to produce specific regional pictures.

Most publicly available information had to meet certain criteria in order to be used. In particular, it had to present some degree of evolution over

time and be aggregated in a way making possible some degree of comparison. Some contextual information about the data collected should also be mentioned. For example, several annual reports by networks or provincial agencies mention orders of magnitude in activities for young people. These reports are generally annual and do not always discriminate the context of the activities described, which sometimes overlap with the educational system.

With respect to the information that was collected, we must point out that the financial figures were not adjusted for inflation. As a result, the financial data presented reflects figures for the time when they were collected by the agencies and other organizations concerned. Given that the timeframes covered by the main tables in this report are relatively limited (mostly five years), the non-indexing of data is not extremely significant, although it might increase or lower some trends.

Despite the strenuous and thorough work performed, these research circumstances necessarily imply a degree of caution with respect to its findings or conclusions. This report on audiences describes a few trends and notes several orders of magnitude. However, its primary value lies in the fact that it assembles the information available and can thus be used to obtain a clearer grasp of audiences in the TYA and children's festival sector in Canada in all its diversity. The report's primary role is also to enhance knowledge about a sub-sector that is an essential part of the performing arts ecosystem in Canada and eventually pave the way for more targeted studies or research.

ANALYSIS OF SECONDARY INFORMATION

2.1 LITERATURE REVIEW

This literature review contains information considered pertinent for a report on the current state of audiences in the Canadian Theatre for Young Audiences (TYA) and children's festivals sector. We begin by focusing on a few key concepts that underpin and clarify our understanding of the sector and our subsequent description of what might be considered the sector's main features.

2.1.1 A sector that has not been well studied or documented

To begin, we need to clarify what we mean by young audiences since they are not only the subject of our report but also constitute a broad demographic defined by a number of performing arts sub-sectors – especially those of theatre which is the primary focus of our report. Many festivals and other events also develop programming specifically for these sub-sectors.

We will then explore the concept of cultural participation which, according to many of the most recent studies, is the overarching concept for several activities of which attending shows is only one. There is a relative wealth of documentation on the cultural participation of young people.

There exists a necessary decision-making process between young audiences and their cultural participation which affects whether or not they – children or teenagers – participate in artistic activities and frequent cultural venues. We will devote an entire section of this review to this aspect.

We will then look at documentation that describes significant trends that specifically impact the TYA sector as well as the performing arts in

general. A few sources describe certain integral components of the current TYA ecology quite well.

We have compiled a few texts that describe success stories or success factors. While the TYA and children's festival sector is reportedly undergoing profound change these days, these texts shed light on how some organizations are coping better than others with these changes. Most studies addressing these issues use a case-study approach to document best practices before presenting them in a broader context.

Any literature review suffers from inherent limitations and this one is no exception. The pattern of professional TYA in Canada is uneven across the provinces. However, there seems to be a relatively clear correlation between the number of organizations active in this sector and the number of reports and other documentation that describe the particular features of this sector in a given region. There is an abundance of relevant documentation from Quebec and some from Ontario but almost none from the other provinces. While some issues are clearly across-the-board, others, especially those that are education system-related are regional. Another difficulty is that it is not always easy to distinguish the contexts of TYA programming because, although this is relatively clear-cut where schools are concerned, other contexts are not specifically addressed in the literature. This is especially true of festivals since those with TYA programming are indistinguishably lumped together with all festivals.

We will therefore conclude this review by indicating a few areas for further research in order to continue to improve our understanding of TYA issues.

2.1.2 Young audiences

How do you define young audiences? Regardless of whether it is called “théâtre jeune public” or “théâtre pour l’enfance et la jeunesse” in French or “theatre for young audiences,” “theatre for young people” or “children’s theatre” in English, all these descriptors seem to refer to the same reality: a theatre practice targeted to a particular demographic. In general, this demographic primarily consists of young people ranging in age from children to teenagers or, in a school context, from primary level (aged 5-12) to high school (aged 12-17 and even up to 18). More recently, a distinction has also been made between early childhood (2 or 3 - 5 years old) and even “very early childhood” (younger than 24 months) with respect to “theatre for babies,”¹ which refers to pre-school or daycare children. In any event, these age categories are clearly social and cultural constructs that reflect Canadian communities and could very well be different in other social contexts.

If we expand this specific context somewhat by isolating the terms “jeune” and “youth” and even “jeune public” and “young audiences,” it emerges that they can refer to a wider demographic including young adults up to the age of 25. In fact, these are terms used in audience surveys for general public theatre. Although the term “youth theatre” appears more ambiguous it generally refers to theatre practised by youth and not by professionals.

However, the apparent wealth of documentation on the attendance and cultural participation patterns of “young people” can be misleading because this literature, whether Canadian or foreign, is generally based on the 15-25 age group and not on younger demographics. In fact, the extreme difficulty of unrestricted access to younger age groups could partly account for this situation. We will come back to this point later.

¹ Marin et McNeil, (2007) p. 13

2.1.3 From attendance to cultural participation

From our review of the documentation on TYA attendance, it seems that it is increasingly being considered from the standpoint of the broader concept of cultural participation or “arts engagement” (another common term). We will begin by describing several texts that cover how the concept of cultural participation has evolved and will then discuss the topic of surveying populations on their engagement with art. In this regard, we will discover the difficulties in including children in this type of research.

Elements of defining “young audiences”

In an extensive report on the cultural participation of young people aged 12-34 in Montreal, Christian Poirier and his research team at INRS - Urbanisation Culture Société (a research university in Quebec) included an exhaustive review of the literature on this topic. Poirier suggests the following general definition of cultural participation: “All artistic and cultural activities carried out by individuals or groups in terms of creation, production, dissemination and attendance.”² He points out that these activities can be differentiated in terms of more “standard” ones that involve attendance-consumption and more “intensive” ones that involve active participation. The report also notes that “the cultural universe of young people is extremely complex and embraces many creation, dissemination/sharing and consumption interests and activities.”³

According to several authors, this complexity, which stems from interrelationships between activity types, is becoming increasingly prominent. Even as early as 2002, Gilles Pronovost pointed out that it was “no longer possible to confine research on cultural practices solely

² Poirier et al. (2012), p. 9

³ Poirier et al. (2012), p. 522

to presence or attendance at cultural venues.”⁴ His voluminous work on the topic led him to conclude that information technologies have significantly expanded the audience for culture. In his book *Temps sociaux et pratiques culturelles* [Social eras and cultural practices], he clearly speaks about “a definite broadening in the concept of culture.”⁵

A similar conclusion is made in the *Ontario Arts Engagement Study* produced by WolfBrown for the Ontario Arts Council (OAC) in 2011⁶. Here again, a very different portrait emerges as soon as a broader definition of arts engagement is used. For instance, if participation via electronic media is included, people are much more involved than one might otherwise think. In general, there are many apparent interconnections (as also noted in Poirier’s research), not only between types of cultural participation but also between artistic disciplines.

The cultural participation characterization model used in the OAC study was developed by WolfBrown and other researchers in a sizeable body of previous work including the often-cited *The Values Study: Rediscovering the Meaning and Value of Arts Participation*.⁷ According to this model, there are five modes of cultural participation based on level of creative control⁸:

- Inventive Participation engages the mind, body and spirit in an act of artistic creation that is unique and idiosyncratic, regardless of skill level.

⁴ Pronovost (2002), p. 30

⁵ Pronovost (2005), p. 25

⁶ WolfBrown (2011)

⁷ Connecticut Commission on Culture and Tourism (2004)

⁸ WolfBrown (2011), p. 11

- Interpretive Participation is a creative act of self-expression that brings alive and adds value to pre-existing works of art, either individually or collectively.
- Curatorial Participation is the creative act of purposefully selecting, organizing and collecting art to the satisfaction of one’s own artistic sensibility.
- Observational Participation occurs when you see or hear arts programs or works of art created, curated or performed by other people.
- Ambient Participation involves experiencing art, consciously or unconsciously, that you did not select.

Poirier points out that this model does not distinguish between professional and amateur practices.⁹ However, this is clearly not the purpose of this conceptual framework. Rather it is to conceptualize the complete range of possibilities for participants in an artistic experience. Accordingly some modes are more participatory and others more receptive. In another report that was prepared for the James Irvine Foundation, the authors position these modes of participation within “the cultural ecosystem” which is graphically represented by three concentric circles moving outwards from professional cultural goods and services to all participatory cultural practices and then to the larger whole of cultural literacy, which is what everyone ultimately wants to improve.¹⁰

This model directly engages professional artists and arts organizations in terms of their willingness, ability and methods to enter into this overall ecosystem. In this regard, the WolfBrown researchers argue that the world of culture is currently undergoing a profound transformation that

⁹ Poirier (2012)

¹⁰ Brown et al. (2011)

will inevitably lead cultural production towards a “making-and-doing” dynamic as opposed to the prevailing one of simply “sitting-back-and-being-told.” They argue that organizations that do not take into account this new reality – the upsurge in creative activity from the grassroots – are destined to slowly lose ground.¹¹ The immediate question these authors ask is whether participatory cultural practice is contradictory to – or complementary to – a business model that relies on professional production and consumption.

At the same time, they do not suggest that repertory works should no longer be produced but rather that, whenever possible and relevant, arts professionals should open up to the community and draw on its creative potential. In this regard, their report includes a series of examples of companies who have successfully developed such hybrid projects. For example, they cite one case where a theatre company invited the public to submit short five-minute plays and received more than 400 proposals. The company then created an event in which half of this material was presented live on the Web over a 24-hour period. This material consisted of works by both professional and emerging writers.

At the beginning of this section we mentioned that the concept of cultural participation which has appeared in recent literature tends to conflate all forms of participation. On the other hand, the concepts of outreach and cultural mediation are still what is most widely employed in the ‘grey’ literature that is being directly produced by the sector. It is equivalent to what is referred to as “mediation culturelle” in the francophone milieus.

Outreach covers cultural action strategies based on interaction and encounter between audiences and artists. Although this term was traditionally often used to describe audience development activities, it

has become more established over the past 15 years or so and has been amplified to include the concept of educating the general public about arts and culture.

The term outreach now embraces activities like pre- or post-show discussions between audiences and artists, educational activities, introductory workshops to the world of theatre, puppets or masks, or even scriptwriting workshops. Use of social media is now increasingly widespread and has become an integral factor in this field. As a potential liaison between artists and their audiences, social media can maintain and develop direct connections with audiences both before and after tours. In this sense, social media are not merely used for promotional purposes but involve the same community partners.

Professional artists are often called upon to serve as the main facilitators in outreach activities with the support of one or more professional facilitators. In fact, this is an occupation that is becoming increasingly recognized with its own specialized training. This training is now being provided by the sector’s associations or networks: PAONE¹² in Ontario, Réseau Scènes in Quebec or even colleges like CEGEP St-Laurent¹³ in the Montreal region.

¹¹ Brown *et al.* (2011), p. 4

¹² Professional Arts Organizations Network for Education: <http://paone.ca>

¹³ <http://www.cegepsl.qc.ca/formation-adultes/aec/programmes/mediation-culturelle/>

Cultural participation surveys

Cultural participation surveys are generally conducted to document people's cultural behaviour. According to Pronovost who scrutinized cultural participation surveys in more than 10 countries, the motivation for these surveys stems from "an ideology of cultural democratization originating implicitly or explicitly from the cultural policies of the 1960s."¹⁴

As soon as governments or agencies instituted programs for improving access to culture or the arts, they then sought to measure the results and impacts of their initiatives.¹⁵ Most researchers agree that the first surveys of this type were conducted in the early 1970s; for instance, Statistics Canada carried out its first cultural participation survey in 1972.

The survey-based methodology is the one most commonly used and the target population is usually individuals aged 15 or older. However, Pronovost has observed that more and more empirical studies on the under-15 age group are now being carried out. In this regard, it is easy to understand the difficulties inherent in researching the behaviour of younger members of society, given that the survey methodology is not designed to canvass children. That is why the available data are usually obtained through more complex surveys that require the cooperation of a respondent parent, usually the mother.

In Canada, Hill Strategies produced one of the few reports on the cultural participation of children consisting of a secondary analysis based on Statistics Canada's *National Longitudinal Survey of Children and Youth*. In his 2011 report *Young children's participation in the arts and reading outside school in 2008*,¹⁶ Hill extracted arts-related data from

the Statistics Canada survey. The artistic activities covered were reading or taking lessons in music, art or dance outside of school and focused on children aged 3-7. Even though theatre was not one of the activities covered, relevant conclusions can be drawn concerning the parent-child connection in terms of accompanying and encouraging children in art and reading. It is also evident that parents with somewhat higher than average incomes living in more urban areas are the most involved in this regard.

Pronovost also researched this area to some extent. After studying the amount of time Quebec residents devote to recreation and culture, he wrote some articles and books on the cultural practices of children that definitely seem to establish him as one of the few specialists on these issues in Canada. From data in the Longitudinal Study of Child Development in Québec published by the Institut de la statistique du Québec, he compiled data relating to culture – reading, watching TV, playing video games and going to libraries, but in the Canadian survey there were no questions about the performing arts.¹⁷ Nonetheless, the value of his work once again lies in helping us understand the crucial role the family plays in shaping children's cultural interests. In other words, we can indirectly deduce that parents need to be interested in theatre at least to some extent, if they are to encourage their children to be interested in theatre and transmit a love of this art to them.

Unlike the two other studies, Poirier's was based on an analysis of primary data obtained from interviews and focus groups involving 58 young people aged 12-34.¹⁸ He then clustered the results to produce group profiles for various themes, including one for a group of 16 youth aged 12-17. It is interesting that, although his study did not include the

¹⁴ Pronovost (2002), p.2

¹⁵ Schuster (2007)

¹⁶ Hill (2011)

¹⁷ Pronovost (2013)

¹⁸ Poirier *et al.* (2012)

5-11 age bracket, participants were also queried about their childhood which generated some information about their past cultural experiences.

It is important to appreciate that this survey, albeit with a relatively small sample, has the merit of embracing the full diversity of cultural practices and perfectly reflects this aspect of its young respondents. Whereas arts professionals not only tend to compartmentalize disciplines but also make clear distinctions between popular art, commercial art and more “aesthetic” art and particularly value venues dedicated to art as opposed to informal spaces, this is definitely not the case for the cultural practices of young people who are clearly very adaptable and fluid in their habits and very eclectic in their tastes. Interestingly, of all the age groups analysed, 12- to 17-year-olds seemed to have the busiest schedules. Indeed, these young people appear to be bursting with cultural activities with many of them practising theatre or improv and going to watch professional shows. However, it seems that their schools play a key role in determining whether they go to professional shows or not.

Although the WolfBrown study (2011) on behalf of the OAC regrettably does not include the 18-and-over age group, it is still relevant because it includes data for a wide range of variables and artistic disciplines. Activities in each discipline are also classified according to the five modes of creative control described above. This study found a significant correlation between the degree of a given discipline’s exposure in popular media and the frequency of people’s participation in that discipline. In this regard, theatre generally had lower attendance and participation than other disciplines. The report nonetheless notes “Frequency is only one aspect of arts engagement... Many Ontarians attach a high degree of importance to activities that they do infrequently.” In fact, this is precisely the case of theatre which the survey respondents regard highly without actually participating in theatrical activities as much as in other cultural practices like listening to music, watching movies and so on.

2.1.4 The decision-making process

Few researchers seem to have addressed this aspect, particularly with respect to TYA. This is undoubtedly because, depending on the age of the potential participants, theatre involves a tremendous overlap of decision-making influences – school (and its stakeholders), family, parents and personal preference.

As we have already seen, most cultural participation surveys do not include young audiences (or only to a very limited extent), except for teenagers. Moreover, the surveys that include young audiences generally say little about children’s actual interest in theatre. On the other hand, these surveys should not be totally ignored because they specifically cover adults, the demographic that is very involved – or will be one day – in the decision-making process at school or at home about children’s cultural participation. However, more in-depth analysis of this aspect in terms of other factors such as family profile would be necessary.

In order to clarify the mechanics of this decision-making process, we can look at the respective roles of education ministries, school boards, school principals, cultural committees, teachers, unions, parents and the students themselves. Unfortunately, there appears to be an almost complete lack of comprehensive data on these roles. Moreover, since education is a provincial responsibility, there are sometimes considerable disparities in education system structure among Canada’s regions.

To answer these questions, it would be necessary to compile information on the curricula and syllabuses in each province’s education system. Although some information on the decision-making structure relative to schools and the arts does exist, this dimension goes far beyond the scope of this review.

Nonetheless, an admirable report on school outings to theatres which was prepared recently by Anne Nadeau for the Conseil québécois du théâtre (CQT), is very helpful in explaining part of the equation.¹⁹ Although this report reflects the prevailing dynamics in Quebec, many aspects of it can possibly be transposed to other contexts.

This report consists of very exhaustive documentation concerning the roles of the various school stakeholders listed above and how they interact with each other. The report not only presents information on the place occupied by theatre in the curriculum and how this is funded, it also demonstrates how school outings to the theatre are an integral part of daily life in Quebec schools. It is noteworthy that this report also documents certain labour union rules and teaching organization parameters that can affect outing dynamics. One of the report's most interesting sections covers the results of a survey on the factors that influence theatre outings – it seems that logistics (time, place and transportation) and the linkage between a show's theme-content and the educational curriculum are more powerful decision-influencing factors than the show's aesthetic form or the reputation of its artists. Cost is naturally singled out as the main impediment to theatre outings.

The decision-making process for TYA school tours may be partly different from school outings. Although there is some school touring in Quebec, this aspect was not specifically detailed in this report.

Another Canadian report that we found relevant is one by Debra MacLauchlan, which was based on interviews and focus groups with teachers in Ontario.²⁰ This report notes the main factors affecting TYA programming in schools for better or worse. For example, as in Nadeau's report, training, budgets and time constraints are identified as

significant obstacles. However, what is original in MacLauchlan's report is her argument that much more attention needs to be paid to teachers than is currently the case. In her view, teachers are a primary audience that TYA professionals need to target just as much as children. Although teachers play a central role, her report highlights the fact that they are woefully ill-prepared to accompany children in their artistic discoveries, whether in school or during school outings.

2.1.5 Success factors

Several documents in both American and European literature describe innovative and inspiring case studies, but very few of these are from Canada. The most relevant of these studies for the TYA sector is *L'étude de quatre modèles de réussite en fréquentation des arts de la scène par les élèves du primaire et du secondaire dans le cadre de sorties scolaires* [Report on four successful models of attendance by primary and secondary students in school outings to performing arts shows], which was prepared for the CQT.²¹ Two of these successful models were cultural committees, one was a coordinating structure between a school board and a municipal presenter, and the other was a support program for theatre outings that was part of a particular region's cultural policy. The success factors identified in almost every one of these models included total commitment by all the school stakeholders involved, a collaborative dynamic between partners based on shared common objectives among decision-making bodies, and the existence of a funding support platform for outing logistics.

In the Flanders region of Belgium, a report by Performing Arts Flanders describes several promising initiatives. One of these is how a number of companies responded to the growing cultural diversity of their audiences by paying more attention to the casting of their shows over the long term

¹⁹ Anne Nadeau (2015)

²⁰ MacLauchlan (2009)

²¹ Lévesque (2012)

in order to more closely reflect the ethnocultural reality of their audiences and counteract the prevailing cast-audience asymmetry. In an effort to reach these populations more effectively in the shorter term and generally embrace wider audiences, some artists have begun to hybridize forms by creating pieces that include less text and more movement and visuals. Also noteworthy is an organizational model that seems to characterize the TYA sector in Flanders: this is a model whereby a company serves as a production platform for several artists who perform for young audiences. This model not only offers more stability and long-term access to resources but also fosters collaboration with many partners in the community.

One paradox in particular that we discovered in our literature review needs to be highlighted. This is that the benefits of art for society in general, and children in particular, are such a common theme in the literature (with many reports consistently documenting the positive effects of cultural participation on both communities and individuals) that the powers-that-be in society (including schools) could legitimately be expected to include the arts to a far greater extent. However, there is still a long way to go in this regard. For instance, a study by McCarthy et al.²² titled *Gifts of the Muse* provides an excellent overview of the best published comments to the contribution of the arts to both societies and individuals. In this work, the authors seek to reframe the debate about the benefits of art. In particular, they differentiate approaches that in a certain way “instrumentalize” the arts in terms of economic benefits for a given community, improved children’s learning and so on from those that simply value the intrinsic benefits of the arts for each individual in terms of personal enrichment. The writings of Zakaras and Lowell²³ make a similar case in *Cultivating Demand for the Arts: Arts Learning, Arts Engagement, and State Arts Policy*. Here the authors argue that

efforts to stimulate appreciation for art in terms of aesthetic experience are not sufficient. Nonetheless, the skills required can be developed, usually by making a continuous effort throughout the school year. This is what they believe to be the cornerstone of an approach designed to cultivate demand. This approach differs from those that simply support cultural supply or facilitate access to the arts. It is by acting simultaneously on these three hubs – supply, access and demand – that we can create a healthier ecosystem in which the arts can be deployed sustainably in participating communities.

The fundamental success factor for effective collaboration, as identified in the literature on best practices, is often general consensus on the beneficial effects of art for both communities and individuals. This is what galvanizes populations, artists, parents, teachers, local authorities, etc.

2.1.6 Significant trends

Another WolfBrown report – the *Survey of Public Participation in the Arts* – was prepared for the National Endowment for the Arts in the United States and is based on an extensive cultural participation survey.²⁴ This report, like the one produced for Ontario, only describes the behaviour of individuals aged over 18. This said, it is relevant in two aspects.

First, it provides an excellent summary of the many factors significantly affecting cultural participation since the first American surveys on this topic were conducted. These factors include: technological change in general, places of practice, accessibility of information, diversification of aesthetics, and the decline in the amount of free time available after work and family obligations. The report’s authors argue that the combination of these demographic, cultural and technological changes constitutes a major challenge for arts organizations today.

²² McCarthy et al. (2004)

²³ Zakaras and Lowell (2008)

²⁴ Novak-Leonard et al. (2011)

In another respect, the originality of this report lies in its multi-mode approach. Its authors do not just survey for the various participation indicators but also cross-reference data on attendance with data on creative participation or participation via electronic media. The portrait that emerges thus appears richer and more complex because of the interrelatedness of the various modes of participation. Since the survey asked a number of questions on participants' past practices, clearer correlations can be made between more participatory practices and attendance at professional shows. According to the report, only regional studies of more limited scope had previously explored these connections.

Both Pronovost²⁵ and Schuster²⁶ devoted much of their research to analysing and comparing cultural participation surveys in a variety of regions over different periods. It seems that even if the survey-or interview-based methodology is more or less the same everywhere and that the question format is also relatively standard, major discrepancies can emerge simply due to linguistic or cultural divergences in the terminology that refers to certain activities or practices. These authors also note a marked tendency to reformulate or flesh out questions over time and point out that these differences can sometimes be so great as to diminish the comparability of the findings concerned.

Nonetheless, the very content of the surveys can provide useful information for researchers insofar as they tend to reflect new practices. For instance, it is interesting to note the appearance of questions on video games or the use of digital platforms to create and disseminate personal videos. Another relevant finding is that what used to be basically qualitative data is now often transformed into quantitative values. It then becomes necessary to use other sources such as

government statistical surveys to produce scenarios that are as close to reality as possible.

The advent of new technologies is definitely a factor that has infiltrated society within a very short timeframe. Many sources mention this factor, but one of these sources is particularly noteworthy, even though it focuses on French youth. This is the report by Frédéric Lefret titled *Les loisirs des jeunes Franciliens de 15 à 25 ans à l'ère du numérique*,²⁷ which argues that new technologies have begun to produce a major change in the mindset of young people at three levels:

- By acting on time, they have created an "on demand" dynamic;
- By acting on space, they have created the phenomenon of "everywhere;" and
- By acting on the relationship to cultural objects, they have consolidated the idea of "producing and disseminating by oneself."

This transformation of the mindset of young people could have been detrimental to the traditional consumption of culture, as many people feared. However, Lefret's study shows that the people who spend the most time on the Internet are also those that go out the most and read the most. Another paradox is that, as opposed to becoming more self-absorbed, these individuals are also more interactive and more open to other people. The study by Poirier et al.²⁸ describes similar attitudes among young Montrealers. These are astonishing findings that call into question some preconceptions. It therefore seems that the interactive

²⁵ Pronovost, (2002)

²⁶ Schuster, (2007)

²⁷ Lefret (2011)

²⁸ Poirier et al. (2012)

nature of new technologies has indirectly stimulated young people to look for more participatory and enriched artistic experiences.

2.1.7 Lines of further research

While Anne Nadeau's report²⁹ contains a wealth of information on school outings and internal school functioning in Quebec and the Ontario report provides relevant information as well, the same kind of data is not available for other provinces.

As we have seen, neither of the two major longitudinal surveys conducted on cultural participation in Canada mentions theatre. Thus, if we want to improve our understanding of how to develop the theatre audience in the long term, it will be useful to obtain data on cultural participation specifically in theatrical activities.

Although this review does not cover, and therefore barely mentions, arts education programs which exist in a variety of forms in the different education systems across the country, we feel that it is crucial to eventually document more fully how these programs are evolving in order to contextualize their impact on young people's participation in professional artistic activities.

The theme of new technologies and the digital era is a complex question that has scarcely been touched by researchers in terms of impact on traditional cultural practices. The main difficulty in this regard lies in the fact that it is a rapidly evolving domain, and the perceptions, fears and predictions expressed only a few years ago have already become obsolete. The few sources we have identified point towards certain trends that would be particularly worth exploring because of the

changing attitudes the digital revolution has produced on people's cultural consumption in general.

Given that technological changes have apparently modified our relationship to time, it would be useful to address this new economy of time in present-day society. It is no longer enough to have money, we also need time. In a context in which we seek to understand audience dynamics, work like that of Pronovost or other researchers who have tried to understand the division of time in families, would be a promising avenue for adapting practices more effectively to society's changing leisure needs.

²⁹ Nadeau (2015)

2.2 QUANTITATIVE PARAMETERS

2.2.1 Methodological considerations

In Canada, there is no existing bank of quantitative data that provides an accurate picture of the national TYA situation. However, many partial sources of varying quality can be helpful in gaining an understanding. In this section we will refer to several of those sources:

- **Statistics Canada:** In order to estimate the size and profile of the potential audience for TYA in Canada from 2000 to 2015, we consulted different estimates of the population by age group and province or territory. These data are of excellent quality.
- The Institut de la statistique du Québec (ISQ), drawing on **Quebec’s cultural and communications observatory (OCCQ)**, produces a series of statistical reports on performing arts dissemination activity in Quebec. We have extracted data on shows for children and youth and, more specifically, theatre productions for this market segment. These data are generally of good quality; their main limitation for the purposes of this study is that they deal only with the reality in the Province of Quebec.

However, a few errors slipped into the initial data for 2013 and 2014. Although the OCCQ had not published the revised data as of May 2016, they provided us with revised approximations for these two years. Since these data are partial, we have indicated them with a number sign (#) for the years in question, where applicable.

- **Réseau Scènes** is a network of multidisciplinary performing arts presenters who operate over 30 cultural venues in six regions of Quebec: Lanaudière, Laurentides, Laval, Montérégie, Montreal and Outaouais. For many years, this network has been collecting data on members’ dissemination activity. It has provided us with data on the dissemination of theatre for primary school students, secondary students and families from 2004-2005 to 2014-2015. These data may take in a number of shows for young people that

are not theatre shows – dance, for example. However, generally speaking, the quality of the data is good and the principal bias is that they deal solely with the activities of network members.

- The Canada Council for the Arts has provided us with data concerning creation/production TYA companies. The data are drawn from **CADAC** (Canadian Arts Data/Données sur les arts au Canada), an online system launched in 2008 for collecting, disseminating and analyzing financial data and statistics on Canadian arts organizations. It allows the Canada Council for the Arts and other public arts support agencies to collect and report such data. CADAC currently collects data from over 1,400 funded organizations in all artistic disciplines.

CADAC’s partners include provincial, territorial and municipal organizations supporting the arts, notably the B.C. Arts Council, City of Vancouver, Alberta Foundation for the Arts, Edmonton Arts Council, Saskatchewan Arts Board, City of Saskatoon, Manitoba Arts Council, Ontario Arts Council, Toronto Arts Council, City of Toronto Arts Services, City of Greater Sudbury, City of Kingston Arts Fund, New Brunswick’s Arts and Cultural Industries Branch of Tourism, Heritage and Culture, Newfoundland and Labrador Arts Council, and the Canada Council for the Arts. Quebec is not a partner, but since the Council funds organizations in that province, CADAC data include certain statistics from Quebec.

CADAC’s financial data are reconciled, whereas the statistical data are not validated and reflect what the organizations have reported; figures may be counted twice. In a very few cases, data are adjusted or deleted – for example, when an organization’s extreme situation affects the overall picture for its group, or the statistical data show a significant disparity over a given period of time. Overall, the quality of data is good; however, the financial information is of better quality than the statistical data. The principal bias is due to the fact that the sample includes only production companies receiving operating support from the Council.

As well, the analysis timeframe is only five years, which is short when identifying trends. Furthermore, the organizations have only recently begun to use the CADAC system, and it can be assumed that beginner's mistakes in conveying information occurred in the first few years (CADAC data are available from 2009-2010).

We are providing a comparative reading of statistics for Anglophone and Francophone production companies. This linguistic division also reflects a geographical divide:

- . Of the 14 Anglophone TYA production companies, two are located in Quebec.
- . Of the 16 Francophone TYA production companies, 15 are located in Quebec.

Data are available from 2009-2010 to 2013-2014. Since the sample's size and its composition vary from year to year, we are using a weighted average in presenting the results and making comparisons.

The Canada Council has also provided us with data for theatre companies that develop activities for children and youth even though they do not specialize in this market. However, these data of CADAC origin have not been validated. They are presented for information purposes as an overall indication of the order of magnitude of these activities. These statistics need to be interpreted with considerable caution.

- **Canadian Heritage** collects certain statistics from its Canada Arts Presentation Fund (CAPF), and has extracted data concerning active dissemination organizations that normally present festivals for young audiences.

We constituted a sample of 16 organizations over 5 years (2009-2013), i.e. a relatively short timeframe for the purpose of determining trends. From 2009 to 2013, Canadian Heritage provided funding to 38 specialist organizations, 22 of which received ongoing funding during the 5 years. We only have fully compiled data for 16 of these organizations.

This sample was designed to be geographically diversified (5 organizations from Quebec, 4 from Western Canada, 4 from the Prairies and 3 from Ontario and the Atlantic Provinces). The sample also contains a wide variety of types of organizations in terms of mandate, programming, target audience and budget size. Nine of the organizations are festivals for children and youth with mostly multidisciplinary programming (8 out of 9). There are also four presenters who specialize in TYA, as well as two companies who specialize in both production and dissemination for young audiences. The sample also includes an anomalous organization whose activities consist mostly in promoting arts for young people and supporting the school system. Finally, there is also a small organization that presents a multidisciplinary youth series. The majority of these organizations operate in an urban context, with only three in a rural or remote region.

Even if it is difficult to gauge the distribution of client groups very precisely from the known data, we have observed that the great majority of these organizations depend on the school system to a significant extent.

Regarding budgets, revenues in 2009 range from less than \$20K to around \$2.25M, with an average of around \$600,000 and a median of \$377,000.

We will work with a weighted average in presenting results and making comparisons.

Note: The financial figures have not been adjusted for inflation. These figures therefore reflect the amounts at the time they were compiled by the agencies and organizations concerned.

In our presentation, we will alert the reader about certain other aspects of our methodology to be taken into account in order to understand and interpret the findings.

2.2.2 Change in the size of the population of young people

In demographic terms, the number of young people aged 3 to 17 defines the potential audience for TYA in Canada.

Tab.1 Changes in The Population of Young People in Canada from 2000 to 2015 in Multiple Age Groups

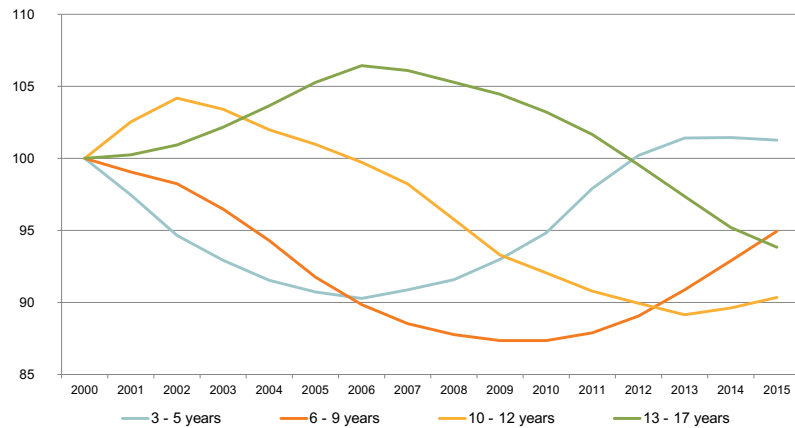
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
3 - 5 years	1,150,393	1,121,181	1,088,801	1,069,046	1,052,938	1,043,698	1,038,594	1,045,347	1,053,556	1,069,751	1,090,950	1,126,331	1,152,726	1,166,647	1,167,028	1,164,916
6 - 9 years	1,642,561	1,627,063	1,613,578	1,584,742	1,548,821	1,507,185	1,475,876	1,454,220	1,441,600	1,434,891	1,434,763	1,443,676	1,462,820	1,492,653	1,525,773	1,559,491
10 - 12 years	1,235,343	1,266,541	1,286,971	1,277,377	1,259,843	1,247,322	1,232,044	1,213,393	1,182,895	1,152,481	1,137,106	1,121,494	1,111,027	1,101,312	1,107,112	1,116,135
13 - 17 years	2,075,671	2,080,622	2,094,914	2,120,531	2,151,353	2,184,983	2,209,105	2,202,130	2,185,267	2,167,979	2,142,380	2,110,141	2,066,249	2,020,858	1,976,113	1,947,609
3 -17 years	6,103,968	6,095,407	6,084,264	6,051,696	6,012,955	5,983,188	5,955,619	5,915,090	5,863,318	5,825,102	5,805,199	5,801,642	5,792,822	5,781,470	5,776,026	5,788,151

Source : Statistics Canada. Table 051-0001 – Population estimates by age group and sex as of July 1, Canada, provinces and territories, annual.

From 2000 to 2015, the number of young people dropped from 6.1M to 5.8M, for a decrease of over 5%. The decrease is biggest for children aged 10 to 12, at nearly 10%, and for youth aged 13 to 17, at 6%. From 2011, the number of children aged 3 to 5 returned to the 2000 level.

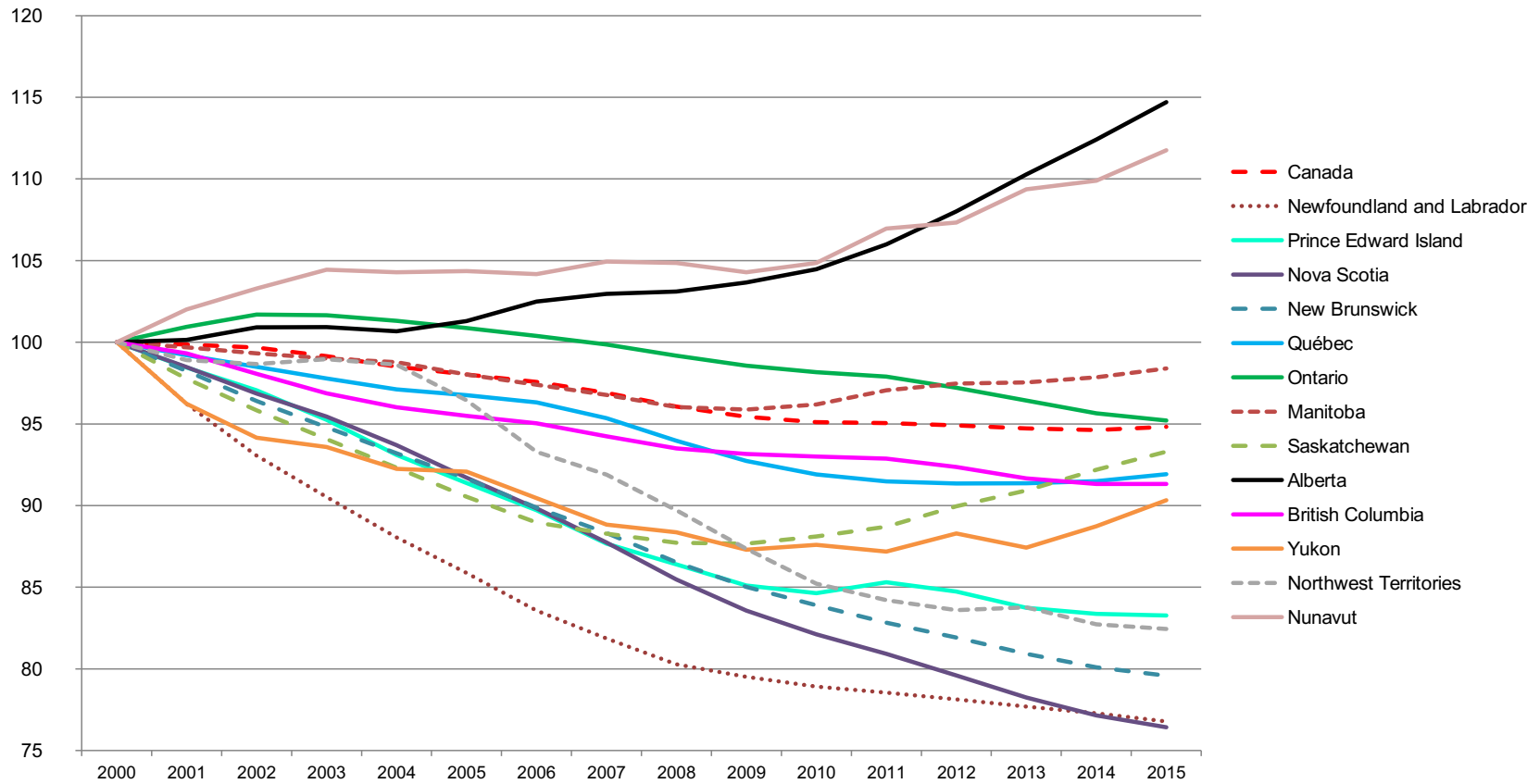
In addition to variations by age group, we observed significant differences according to province or territory. From 2000 to 2015, only Alberta and Nunavut saw strong growth in numbers of young people. Manitoba, Ontario, Saskatchewan, Quebec, British Columbia and Yukon registered numbers close to the Canadian average. By contrast, Prince Edward Island, the Northwest Territories, New Brunswick, and Newfoundland and Labrador saw a steep decline in their population of young people.

Fig.1 Comparative Changes in the Population of Young People in Canada by Age Group, from 2000 to 2015 (base of 100 in 2000)



Source : Statistics Canada. Table 051-0001 - Estimates of population, by age group and sex for July 1, Canada, provinces and territories, annual.

Fig.2 Comparative Changes in the Population of Young People Aged 3 to 17 in Canada by Province or Territory, from 2000 to 2015 (base of 100 in 2000)



Source : Statistics Canada. Table 051-0001 - Estimates of population, by age group and sex for July 1, Canada, provinces and territories, annual.

These demographic parameters generally indicate an unfavourable environment for audience development in the TYA and children's festival sector in Canada. Apart from the substantial differences between the different provinces and territories, we must also consider regional disparities within them, in particular the migration from certain outlying regions to the urban centres.

Beyond what the general data show, the youth sector's sociocultural profile changes with the greater or lesser presence of ethnically diverse communities produced by immigration and the dynamic growth in certain Indigenous communities – for example, the notable growth of the young population in Nunavut, which can be explained by a high Inuit birth rate.³⁰

In recent years, we have therefore seen a relatively large change in Canada's audiences for TYA. In many cases, the numbers of young people have dropped, especially in certain age groups. Along with this trend in the numbers, the sociocultural profile of young people has tended to change, with an increasingly noticeable presence of children from diverse and Indigenous communities.

2.2.3 The big picture in Quebec

There are no comprehensive statistics, much less detailed ones, regarding the performance of TYA dissemination Canada-wide. At the provincial level, only Quebec collects information about the TYA dissemination in a systematic and sustained way, using the information provided by its cultural observatory (Table 2). It is important to remember when comparing these figures with other sources that they include all dissemination activities for young audiences and not only those by organizations which receive Canada Council funding, for example.

The very low dissemination performance level for 2005 can be explained by a boycott in the schools. Teachers were encouraged by their union to boycott cultural activities as a pressure tactic in contract negotiations. An asterisk (*) is used to flag the statistical "accident" of 2005 in tables and figures.

Also note that, although a few errors slipped into the data for 2013 and 2014, the OCCQ provided us with revised approximations for these two years. Since these data are approximate and partial, we have indicated them with a number sign (#) for the two years in question where applicable.

³⁰ Statistics Canada, *Inuit in Canada: Selected findings of the 2006 Census – A young and growing population*. Canadian Social Trends (11-008-X).

Tab.2 Statistics on TYA Box-Office Revenue in Quebec from 2004 to 2014

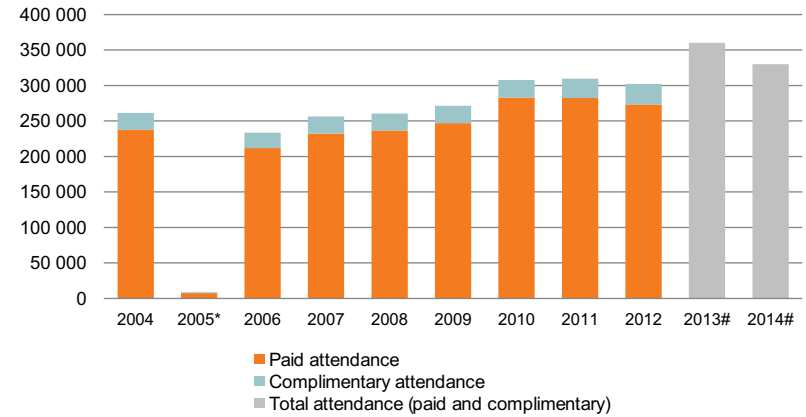
	2004	2005*	2006	2007	2008	2009	2010	2011	2012	2013#	2014#
Individual shows	121	10	131	143	133	114	148	148	169	181	170
Performances	1,074	42	959	1,117	1,159	1,104	1,275	1,274	1,314		
Average number of performances per show	9	4	7	8	9	10	9	9	8		
Total attendance	261,245	8,789	233,347	256,398	260,282	271,519	307,753	309,462	302,188	360,000	330,000
Paid attendance	237,433	7,390	211,873	232,258	236,424	247,007	282,873	282,240	273,201		
Attendance with complimentary tickets	23,812	1,399	21,474	24,140	23,858	24,512	24,880	27,222	28,987		
Number of spectators with complimentary tickets	9	16	9	9	9	9	8	9	10		
Average attendance per performance	243	209	243	230	225	246	241	243	230		
Average attendance per show	2,159	879	1,781	1,793	1,957	2,382	2,079	2,091	1,788		
Tickets available	334,973	16,124	311,598	355,811	381,327	357,018	412,112	435,558	402,831		
Percentage of house sold	78	55	75	72	68	76	75	71	75		
Percentage of paid tickets	71	46	68	65	62	69	69	65	68		
Number of venues	113	21	118	124	128	120	136	139	155		
Ticket sales net of taxes	\$1,725,862	\$44,973	\$1,576,879	\$1,919,993	\$2,042,257	\$2,312,784	\$2,429,890	\$2,992,250	\$2,790,132	\$4,100,000	\$3,200,000
Average box office revenue per spectator	6.60	5.10	6.80	7.50	7.90	8.50	7.90	9.70	9.20	11.4	9.7
Average box office revenue per paying spectator	7.30	6.10	7.40	8.30	8.60	9.40	8.60	10.60	10.20		
Average box office revenue per performance	\$1,607	\$1,071	\$1,644	\$1,719	\$1,762	\$2,095	\$1,906	\$2,349	\$2,123		
Average box office revenue per show	\$14,263	\$4,497	\$12,037	\$13,427	\$15,355	\$20,288	\$16,418	\$20,218	\$16,510	\$22,652	\$22,652

: data is unavailable

Source : Institut de la statistique du Québec (ISQ), Observatoire de la culture et des communications du Québec (OCCQ).

The TYA performance indicators in Quebec from 2004 to 2014³¹ show a pattern of overall growth with total attendance rising from 261,000 spectators to 330,000 over this period. The peak year was 2013 with 360,000 spectators, which, according to the OCCQ, was primarily due to the stellar success of one particular show.

Fig.3 Change in TYA Attendance in Quebec from 2004 to 2014



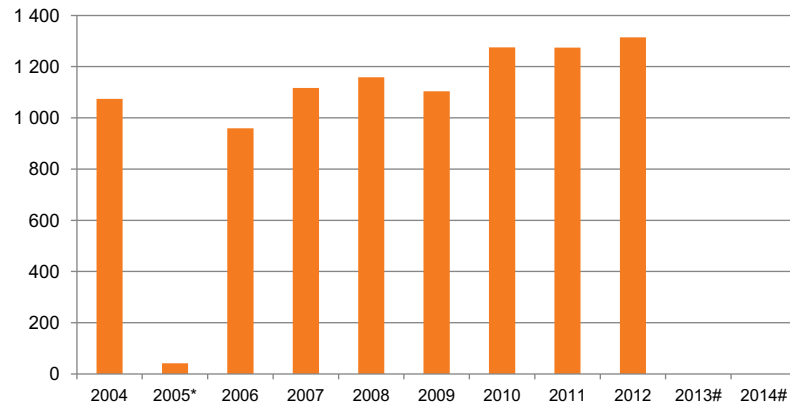
: data is approximate

Source : Institut de la statistique du Québec (ISQ), Observatoire de la culture et des communications du Québec (OCCQ).

³¹ The term performance indicators refers to data that quantitatively reflect the sector's level of activity (number of performances, spectators, etc.) and financial returns (box-office revenue per performance, per spectator, etc.). However, these indicators do not reflect the financial health of the production/dissemination organizations concerned.

From 2004 to 2012, the total number of performances rose from 1,100 to 1,500. The very low level of performance activity in 2005 can be explained by the teachers' boycott of cultural activities as a pressure tactic in contract negotiations. The number of performances did not rebound to 2004 levels until 2007, and attendance remained low until 2008.

Fig.4 Change in the Number of TYA Performances in Quebec from 2004 to 2014

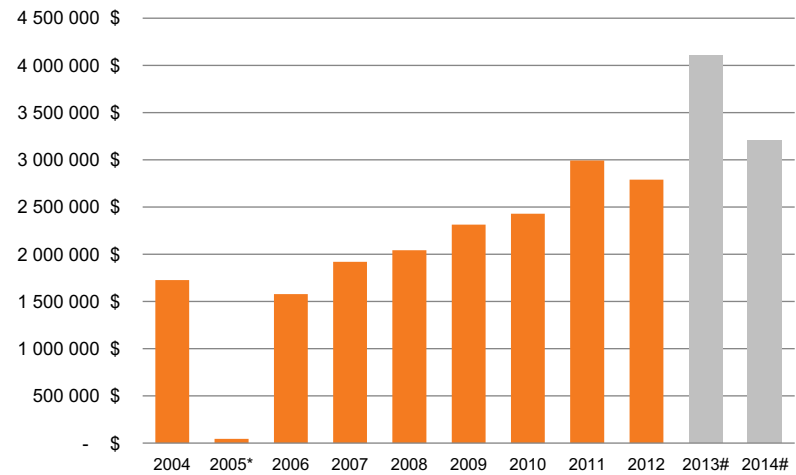


: data is unavailable

Source : Institut de la statistique du Québec (ISQ), Observatoire de la culture et des communications du Québec (OCCQ).

The growth in overall TYA attendance was accompanied by an increase in box-office revenues. From 2004 to 2014, box-office revenue increased by 85% – from \$1.7M to \$3.2M.

Fig.5 Changes in TYA Box-Office Revenues in Quebec from 2004 to 2014

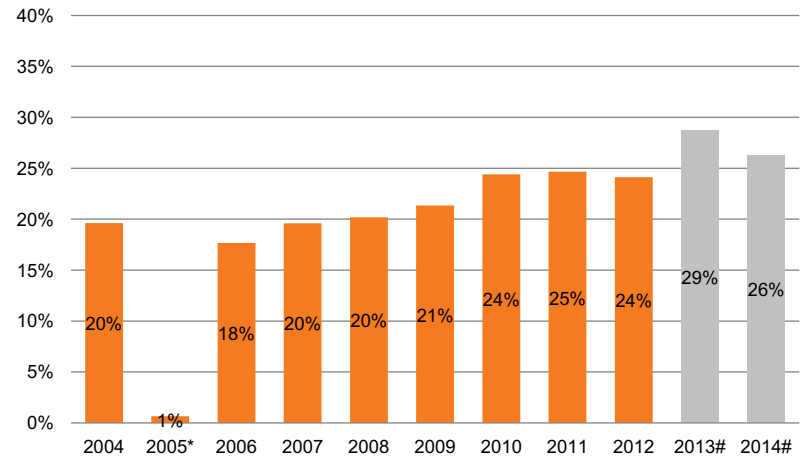


: data is approximate

Source : Institut de la statistique du Québec (ISQ), Observatoire de la culture et des communications du Québec (OCCQ).

In calculating the percentage of total TYA attendance based on the population aged 3 to 17 years in Quebec from 2004 to 2014, we can conclude that the gross rate of attendance increased steadily to reach a high of 25 % in 2013 and 2014. This figure is only a general indication, since some children may see several plays while the TYA supply is almost non-existent in some regions. Nonetheless, it seems to show that more and more of Quebec's young people are now attending performances of theatre for children and youth.

Fig.6 Change in the Percentage of Total TYA Attendance Among Children and Youth aged 3 to 17 in Quebec from 2004 to 2014



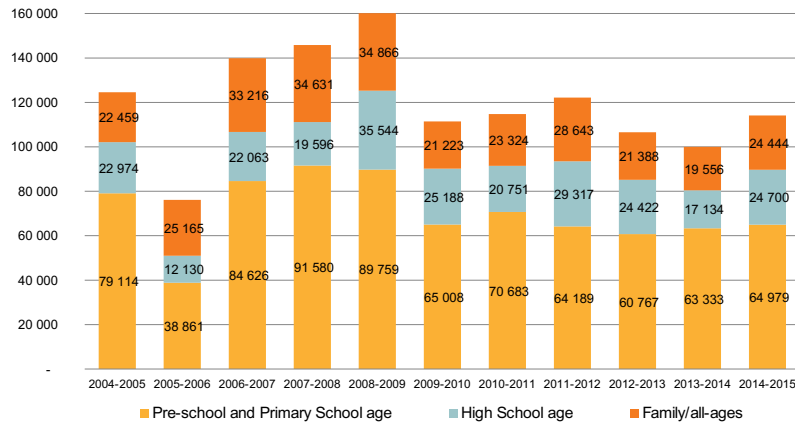
: data is approximate

Source : Institut de la statistique du Québec (ISQ), Observatoire de la culture et des communications du Québec (OCCQ).

Réseau Scènes is a presenters' network that consists of 30 cultural venues located in six of Quebec's regions: Lanaudière, Laurentides, Laval, Montérégie, Montreal and Outaouais. The network systematically compiles detailed statistics on its members' activities, which include presenting several young audiences series. Following a peak in 2008-2009, total attendance has remained fairly constant at about 110,000 spectators.

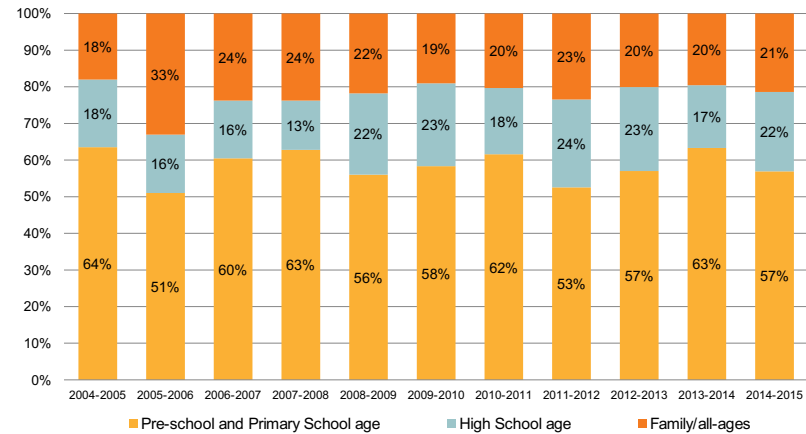
Most interesting is the audience composition: approximately 60% are primary school students on outings and 20% secondary students. Family outings where the child is accompanied by a family member, amount to only 20% of total attendance. These proportions have remained relatively constant over the past 11 years.

Fig.7 Change in Total TYA Attendance at Réseau Scènes Presentations by Series



Source : Special compilation by Réseau Scènes

Fig.8 Share of total TYA Attendance at Réseau Scènes Presentations by Series



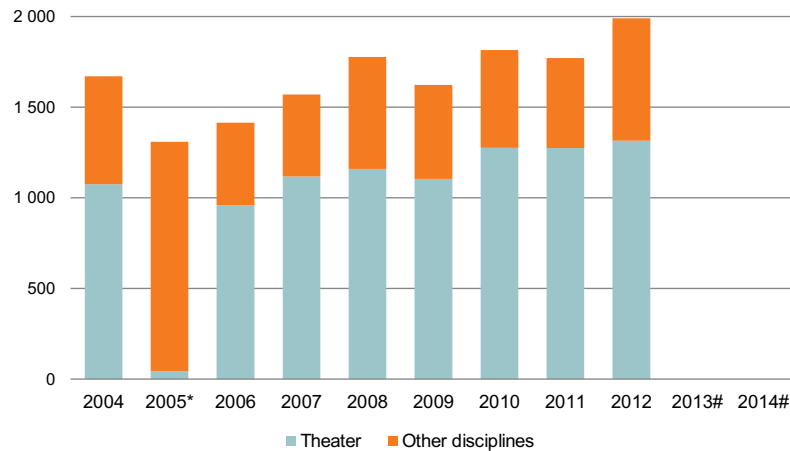
Source : Special compilation by Réseau Scènes

2.2.4 Effect of competition from other disciplines

Theatre is not the only arts discipline to have an interest in young audiences. Singing, dance, circus arts and music all offer shows designed specifically to reach children and youth. According to many observers, the number and quality of these offerings have grown in recent years.

What are the effects of this diversification of supply? According to data collected by the Observatoire, the increase in the number of performances in theatre has been paralleled by a similar increase in other disciplines for the same audiences. The proportion of performances in other disciplines has remained relatively constant at approximately 30% since 2006.

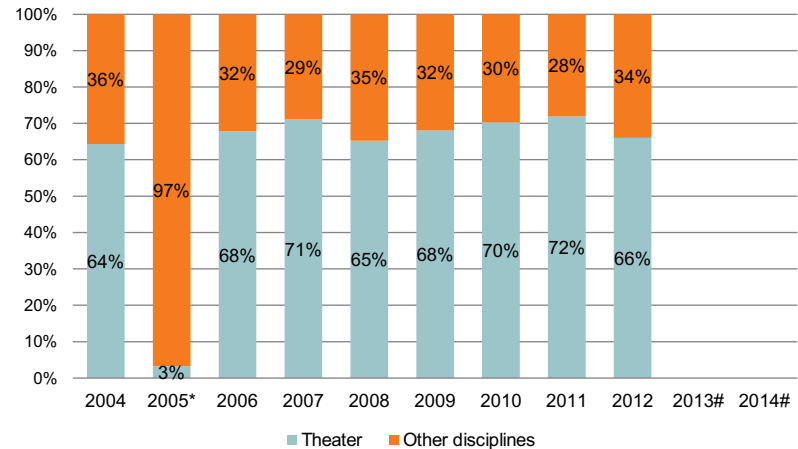
Fig.9 Change in Number of Performances for Children and Youth in Theatre and other Disciplines in Quebec from 2004 to 2014



: data is unavailable

Source : Institut de la statistique du Québec (ISQ), Observatoire de la culture et des communications du Québec (OCCQ).

Fig.10 Proportion of Number of Performances for Children and youth in Theatre and Other Disciplines in Quebec from 2004 to 2014

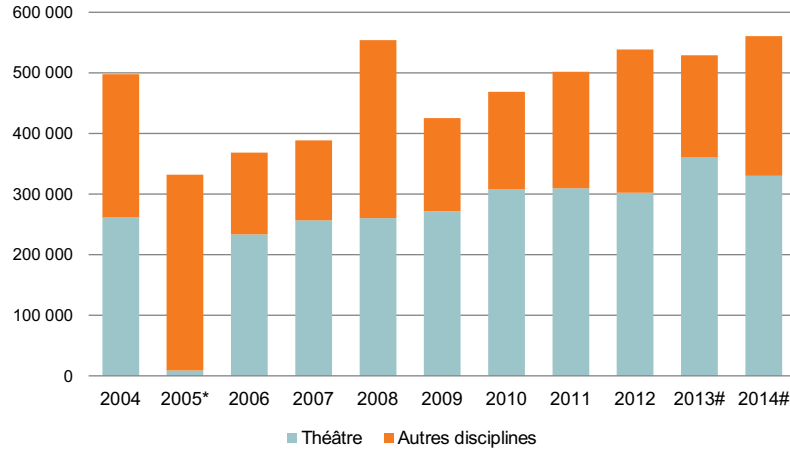


: data is unavailable

Source : Institut de la statistique du Québec (ISQ), Observatoire de la culture et des communications du Québec (OCCQ).

The findings are substantially similar for attendance. A larger share of total attendance for other disciplines drives home the fact that, on average, the number of spectators per performance is greater for the other disciplines than for theatre.

Fig.11 Changes in Total Attendance at Performances for Children and Youth in Theatre and Other Disciplines in Quebec from 2004 to 2014³²

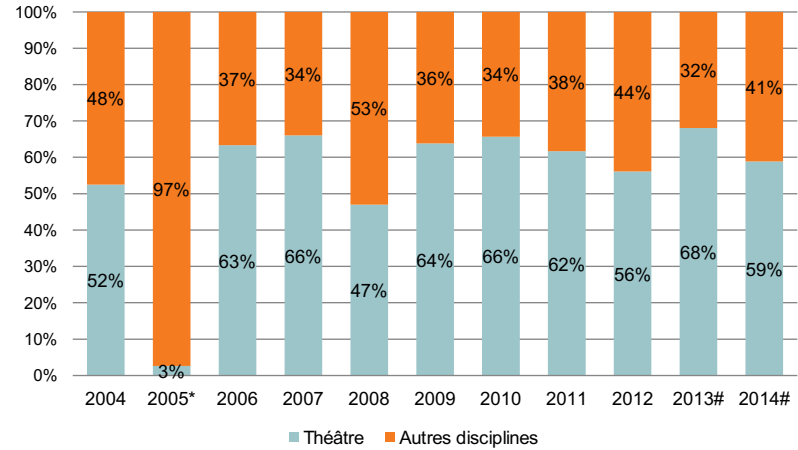


: data is approximate

Source : Institut de la statistique du Québec (ISQ), Observatoire de la culture et des communications du Québec (OCCQ).

³² Note: The teachers' boycott in 2005 naturally affected attendance in 2005 whereas in 2008 the OCCQ included attendance and ticket sales for at least one very successful "other disciplines" production, which significantly reduced the relative share of theatre compared with these other disciplines.

Fig.12 Share of Total Attendance at Performances for Children and Youth in Theatre and other Disciplines in Quebec from 2004 to 2014³³



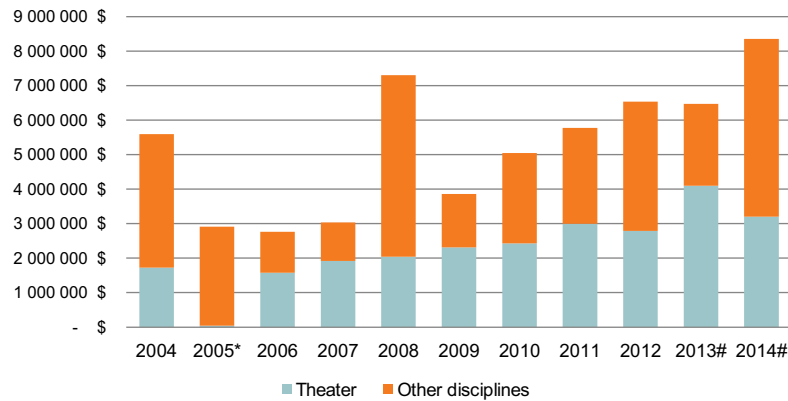
: data is approximate

Source : Institut de la statistique du Québec (ISQ), Observatoire de la culture et des communications du Québec (OCCQ).

³³ See previous note.

Where ticket sales are concerned, the split favours the other disciplines. While audiences for the latter represent only about 30% of total attendance, other disciplines bring in approximately 40% of box-office revenues. The average return per spectator is therefore larger for other disciplines than for theatre.

Fig.13 Changes in Box-Office Revenues from Productions for Children and Youth in Theatre and Other Disciplines in Quebec from 2004 to 2014³⁴

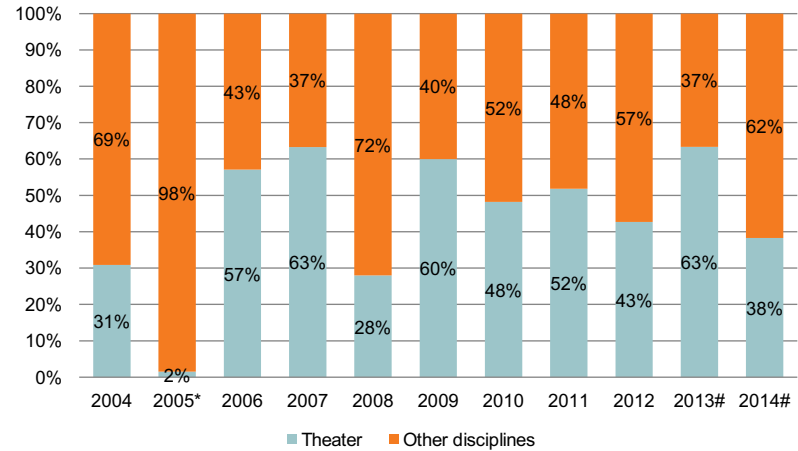


: data is approximate

Source : Institut de la statistique du Québec (ISQ), Observatoire de la culture et des communications du Québec (OCCQ).

³⁴ Regarding years 2005 and 2008, see note 32.

Fig.14 Share of Box-Office Revenues from Productions for Children and Youth in Theatre and Other Disciplines in Quebec from 2004 to 2014³⁵



: data is approximate

Source : Institut de la statistique du Québec (ISQ), Observatoire de la culture et des communications du Québec (OCCQ).

Overall, in Quebec, the development of the performing arts supply for children and youth by other disciplines does not seem to have had a negative impact on theatre. Performance indicators point instead to a parallel development.

³⁵ See previous note.

2.2.5 Parallel presentation of statistics describing French- and English-language production companies (CADAC)

The intention in providing a parallel presentation of French- and English-language creation/ production companies is to clarify two rather different dynamics associated with the realities in the province of Quebec and the more widespread realities on the national level. The language difference translates into a different way of structuring the respective arts sector, whether that means how arts organizations are funded or how activities are developed. We will therefore make an effort to describe these differences and also to underscore resulting tendencies observed over a five-year period from 2009-2010 to 2013-2014. These few descriptive parameters reflect the scale of differences in activity structuring:

The 14 English-language production companies in the CADAC sample:

- Seven English-language companies manage performance spaces ranging from large two-theatre complexes to smaller 100-seat spaces.
- Many companies operate as both producing companies and presenting companies.
- The majority of English-language companies run drama schools, residencies and camps in addition to their producing/presenting activities.
- Some companies have venues that, although they are not theatre facilities, have studio and rehearsal spaces that are used for classes or rental activities.
- Other companies focus their activities on producing and touring.

- Most tours are in the schools. Opportunities for tours to theatres are more limited in English Canada. Some companies cover vast geographic areas and serve remote regions.

The 16 French-language production companies in the CADAC sample:

- All but one are based in Quebec.
- Francophone professional TYA companies are basically ones that create their own works (fresh scripts, collective writing, etc.) and tour (very few present in their own facilities). They invest most of their resources in creation (several months) and production. Earned revenue is almost solely from the sale of their shows.
- Four French-language professional companies manage a performance hall. Others have rehearsal space.
- The dissemination of TYA in Quebec is handled by three specialist presenters as well as by a number of multidisciplinary presenters that play a major role in audience development. Professional TYA companies perform almost exclusively in professional facilities and very rarely perform in schools.

We will therefore make an effort to describe these differences and also to underscore resulting trends observed over a five-year period from 2009-2010 to 2013-2014.

Finally, it is important to remember that our conclusions are derived from the study of a relatively small sample of companies, and that these companies are included because they receive operating funding from the Canada Council, which implies that they have reached a certain level of peer-recognized artistic and administrative maturity.

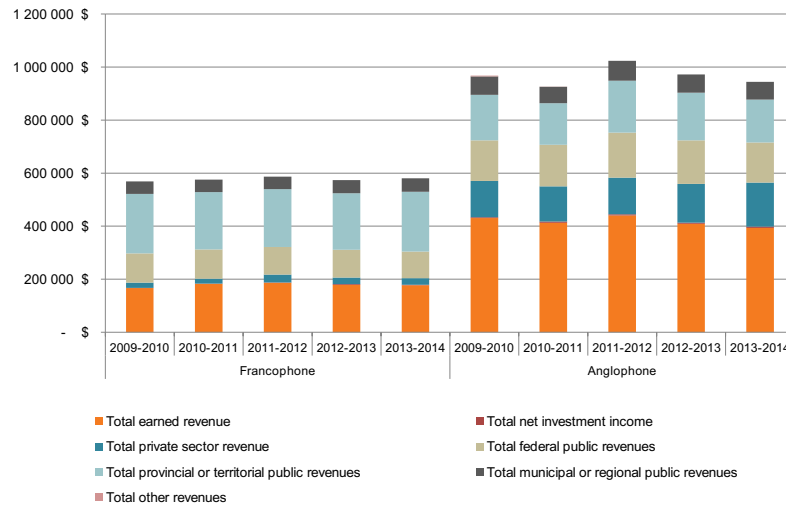
Overall, in terms of how total revenues are structured, there has been little change from 2009-2010 to 2013-2014 for either French- or English-language companies.

For French-language companies, total revenues average around \$575K, with the principal source being the province's or territory's public sector, at 30% of revenues. Earned revenues amount to around 30%, while those from the private sector barely reach 5%.

For Anglophone companies, total revenues are close to \$1M, the main source being earned revenues at over 40% of the total. Over the five years, provincial or territorial public revenues seem to have dropped slightly, while those from the private sector have increased enough to offset the decrease.

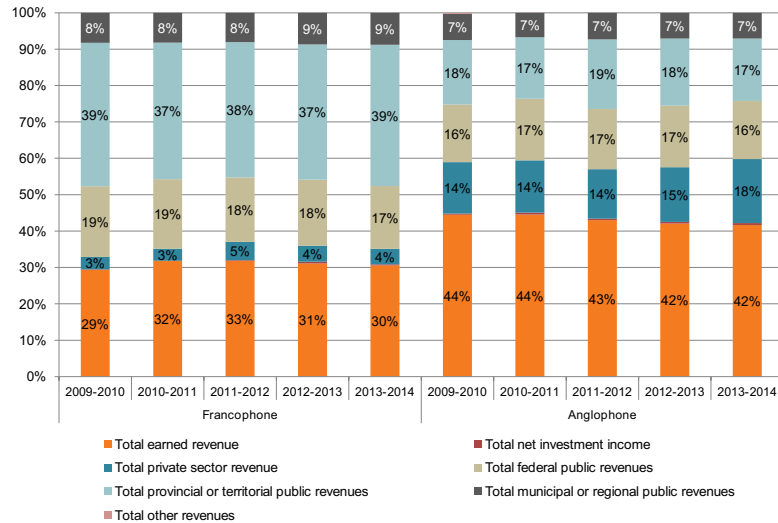
Proportionally, federal public revenues seem more or less the same for both language groups, at approximately 17% in 2013-2014.

Fig.15 Comparative Changes in the Structure of Total Revenues for Francophone and Anglophone Creation/Production Companies (\$)



Source : Canadian Arts Data (CADAC).

Fig.16 Comparative Change in Total Revenue Structure for Francophone and Anglophone Creation/Production Companies (%)

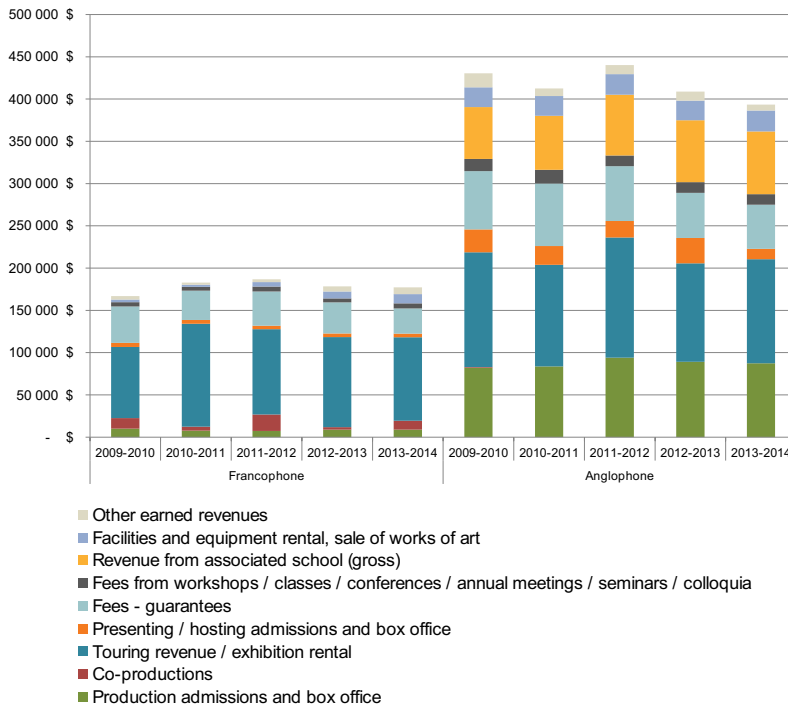


Source : Canadian Arts Data (CADAC).

To simplify comparison, in terms of total revenues the ratio between Anglophone and Francophone creation/production companies is 2:1. This ratio defines an order of magnitude to which we will refer in our further analysis.

Regarding earned revenues, the amount is about \$175K for the Francophone companies and \$400K for the Anglophone companies. The primary source is touring, with the Francophone companies earning approximately \$100K and the Anglophone companies, \$120K. Touring revenue therefore represents over 50% of the Francophone companies' earned revenues, whereas it is less than a third for Anglophone companies.

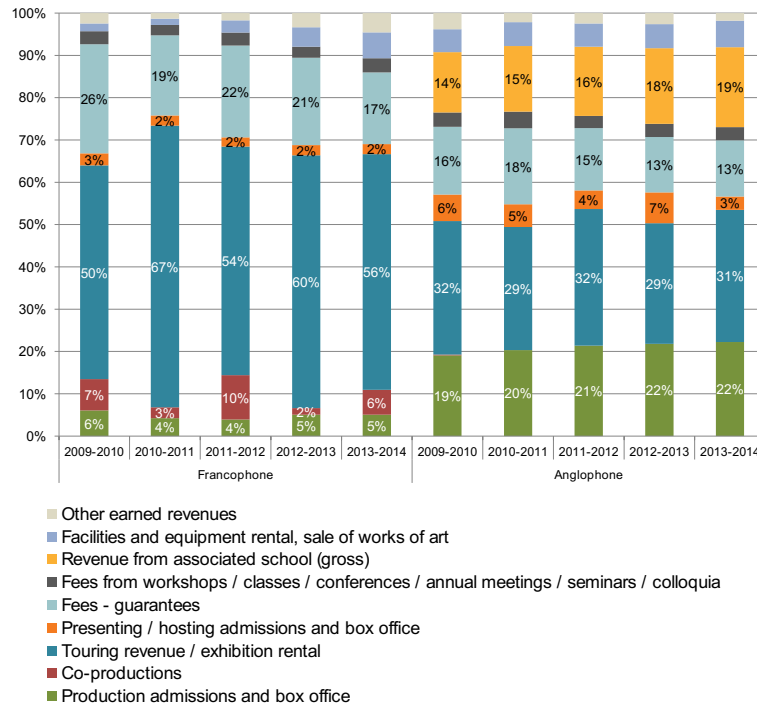
Fig.17 Changes in the Structure of Revenue Earned by Francophone and Anglophone Production Companies (\$)



For Francophone creation/production companies, the two other sources of significant revenue are fees - guarantees (home market) and revenue from co-productions, which respectively represent about 15% and 7% of the total. Revenue from admissions based on ticket sales does not exceed 6% of earned revenues. Anglophone companies have much more diversified sources of earned revenue. Income from ticket and subscription sales amount to 22%, while that from a school associated with the organization amounts to almost one-fifth of earned revenues at 19%.

Source : Canadian Arts Data (CADAC).

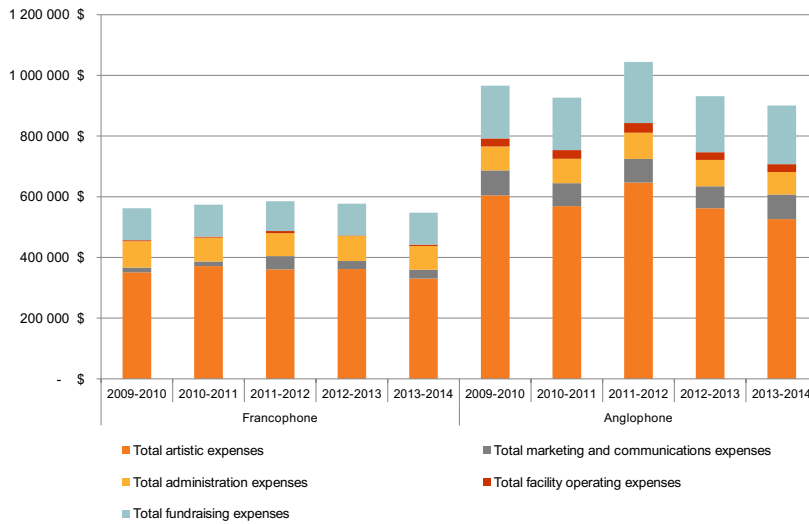
Fig.18 Changes in the Structure of Revenue Earned by Francophone and Anglophone Production Companies (%)



At this stage of the analysis, the recorded differences account not only for the difference in size between Francophone and Anglophone production organizations, but also for a difference in how activities are structured. An analysis of expenses confirms how far these differences extend.

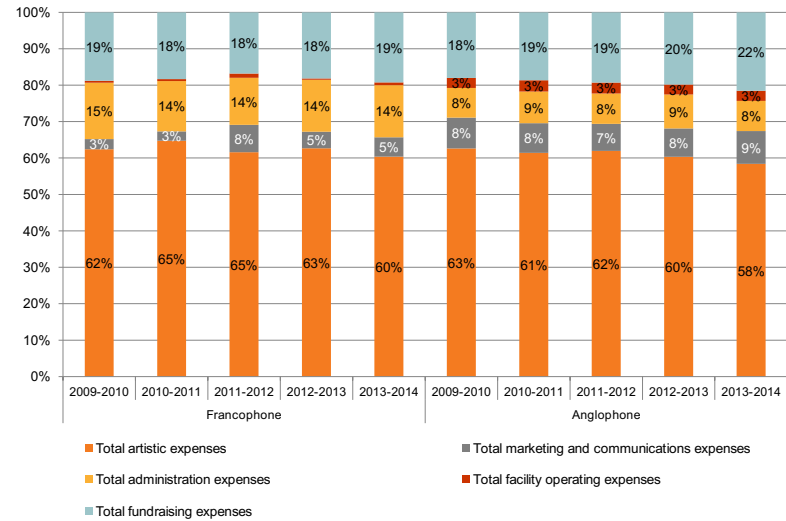
Source : Canadian Arts Data (CADAC).

Fig.19 Comparative Changes in the Structure of Expenses for Francophone and Anglophone Creation/Production Companies (\$)



Source : Canadian Arts Data (CADAC).

Fig.20 Comparative Changes in the Structure of Expenses for Francophone and Anglophone Creation/Production companies (%)



Source : Canadian Arts Data (CADAC).

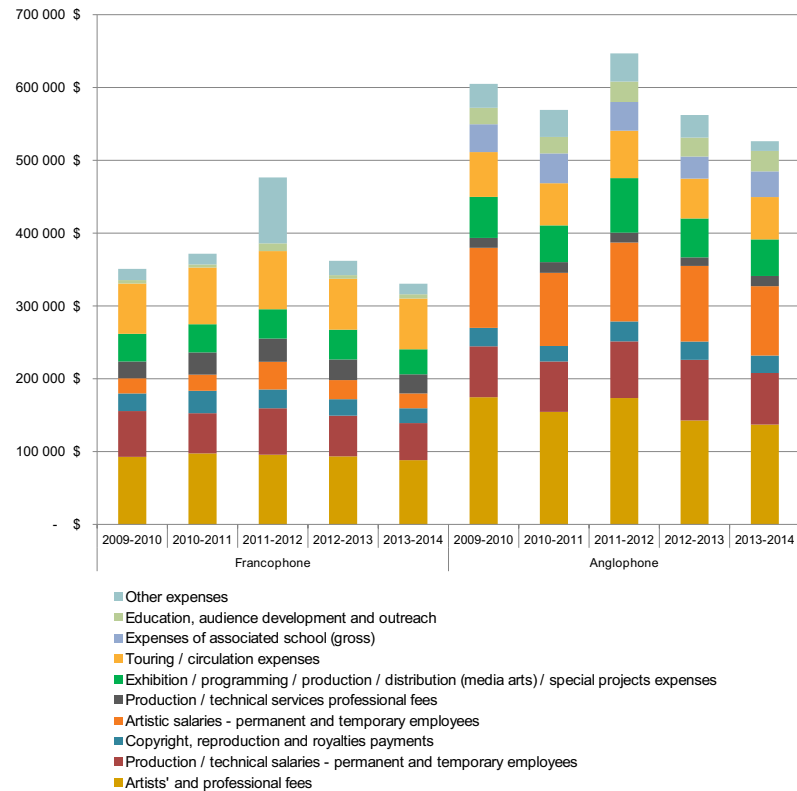
Artistic expenses represent slightly more than 60% of total expenses, whether for Francophone or Anglophone creation/production companies. The proportion of expenses for administration is also relatively similar in both cases, at about 20%. Proportionally, marketing and communications expenses are slightly higher for Francophone companies at about 14%, as compared to 9% for the Anglophone companies.

Fundraising expenses represent approximately 3% of the total for Anglophone companies, whereas they are very low for their Francophone counterparts. These results should be interpreted in light of private-sector revenues, which represent up to 18% of the total for Anglophone companies, while they are at 4% for Francophone companies.

Proportionally, expenses for space rental are almost twice as high for Anglophone companies than those for Francophones companies, at 9% and 5%, respectively.

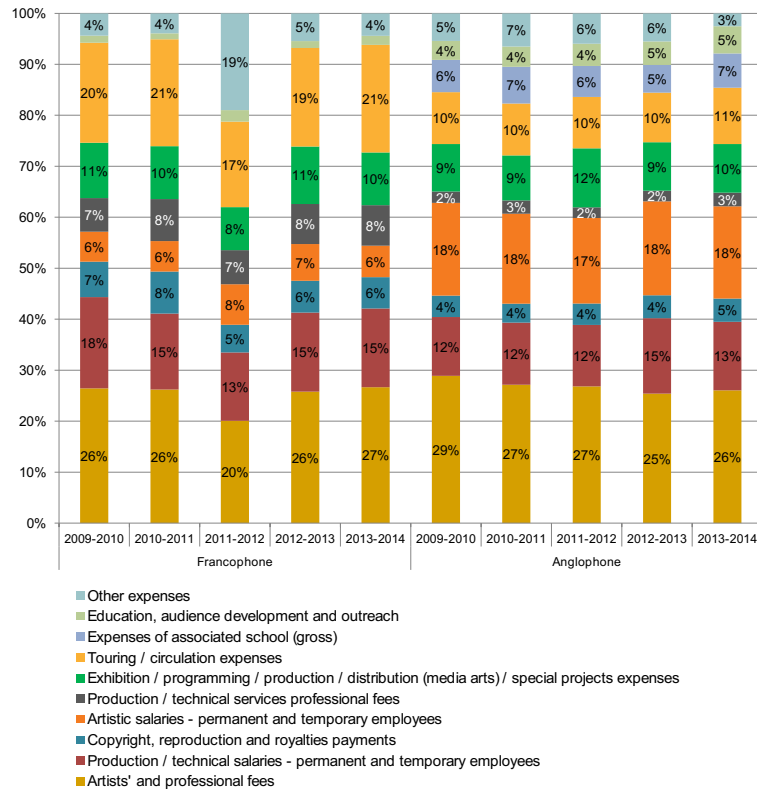
Analyzing how artistic expenses are structured is made more complicated by the high number of budget items. Nonetheless, the proportion associated with artists' and professional fees, and full- or part-time salaries of artistic employees is relatively similar for the two groups, at approximately 40% of artistic expenses.

Fig.21 Changes in the Structure of Artistic Expenses for Francophone and Anglophone Creation/Production Companies (\$)



Source : Canadian Arts Data (CADAC).

Fig.22 Changes in the Structure of Artistic Expenses for Francophone and Anglophone Creation/Production Companies (%)



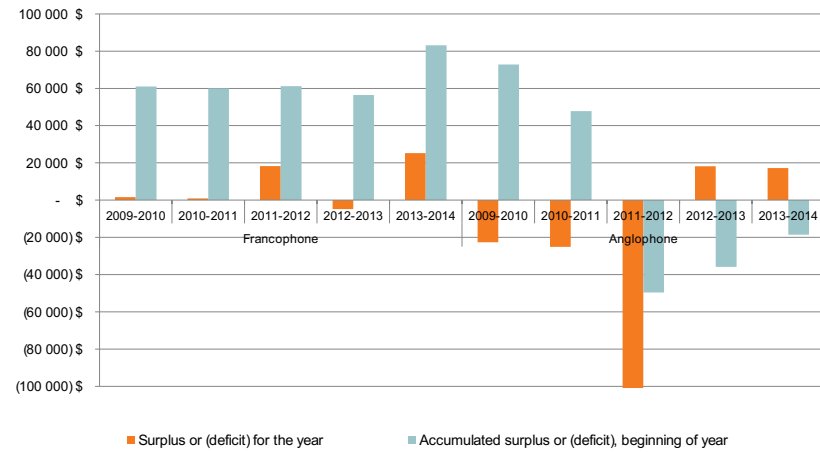
The major differences are to be found in the following areas: salaries for permanent and temporary production/technical staff and touring expenses. Proportionally, the artistic expenses related to the salaries of production/technical staff for Anglophone companies are three times as high as those for Francophone companies, at 18% and 6%, respectively of all artistic expenses.

Conversely, expenses related to touring costs for Francophone companies are twice as high as those for Anglophone companies, at 20% and 10% respectively of all artistic expenses.

Source : Canadian Arts Data (CADAC).

Over the past five years, the financial situations of the two groups of creation/production companies seem to have evolved in opposite directions. In the case of Francophone companies, aside from the exceptional year of 2012-2013, when we can see a slight annual deficit, the situation seems to have been under control and made it possible to produce an accumulated surplus for all five years. For the Anglophone companies, annual deficits for the three years from 2009 to 2012 resulted in an accumulated deficit that was not eliminated despite annual surpluses in 2012-2013 and 2013-2014.

Fig.23 Comparative Changes in Annual and Accumulated Surpluses for Francophone and Anglophone Creation/Production Companies (\$)

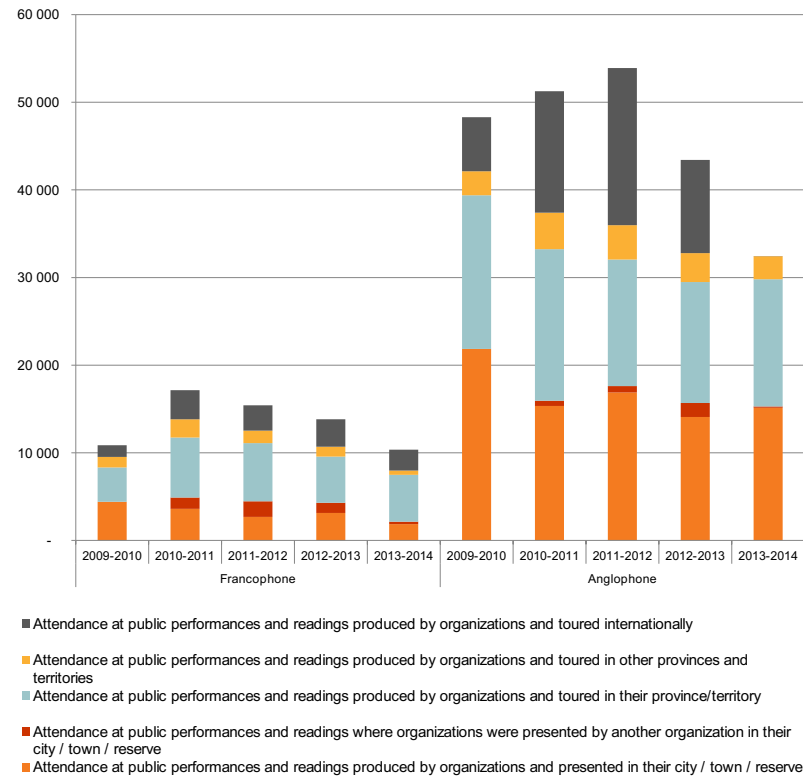


Source : Canadian Arts Data (CADAC).

Unfortunately the statistical data on attendance and on the various activities of creation/production companies are not of the same quality as the financial data gathered. CADAC does not systematically check these data as it does in the case of financial data. This leads to variations that are hard to interpret. It is therefore appropriate to proceed with caution, and avoid putting too much weight on variations over the short term. For example, in 2013-2014, English-language production companies did not provide data about their international touring activities. The findings we present in the figures below therefore suffer from this lack of information.

Where attendance is concerned, the ratio between Anglophone and Francophone companies is no longer 2:1 but 3:1 and even 4:1. Nonetheless, the companies seem to have experienced a general drop in attendance after 2011-2012; the worst performance for the entire five-year period was recorded in 2013-2014. However, it should be pointed out that the substantial deficit posted by English-language companies in 2011-2012 was partly due to accounting adjustments made by one of these companies in the CADAC sample.

Fig.24 Comparative Changes in Attendance at Public Performances (Including Readings) by Francophone and Anglophone Creation/Production Companies



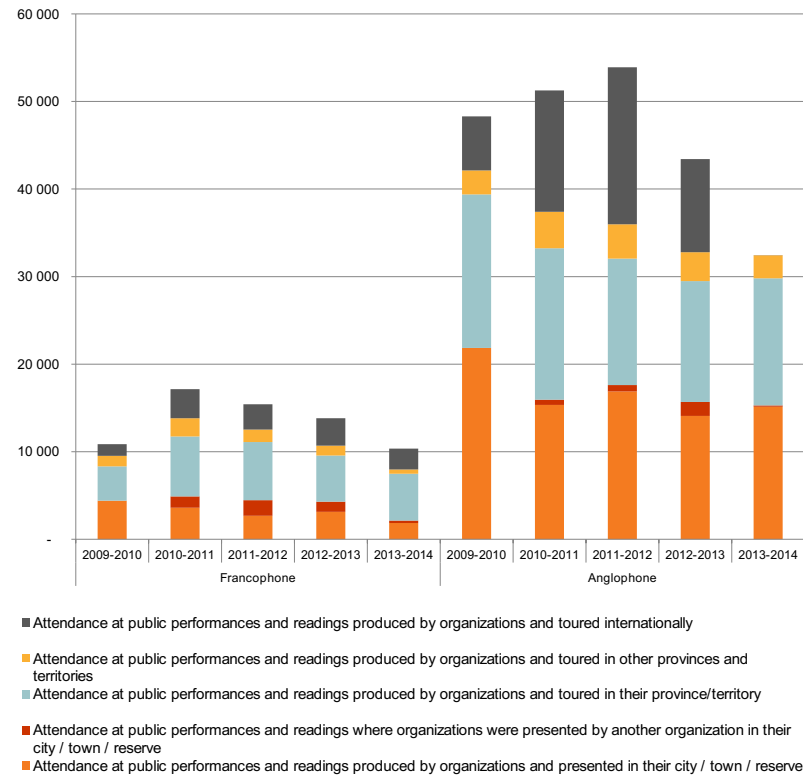
Source : Canadian Arts Data (CADAC).

Regarding attendance, the percentage breakdown of the total by origin – local, home province, other provinces and international – displays a clear variation from year to year. Several orders of magnitude can nonetheless be established:

- For Francophone companies, 30% of the attendance is local, 40% in the home province, 10% in other provinces, and 20% on international tours.
- For Anglophone companies, 35% is local, 30% in the home province, 7% in other provinces, and 28% on international tours.

For Francophone companies, a certain trend towards a decrease in attendance locally and in other provinces, and an increase in the home province and on international tours is apparent over the five-year period.

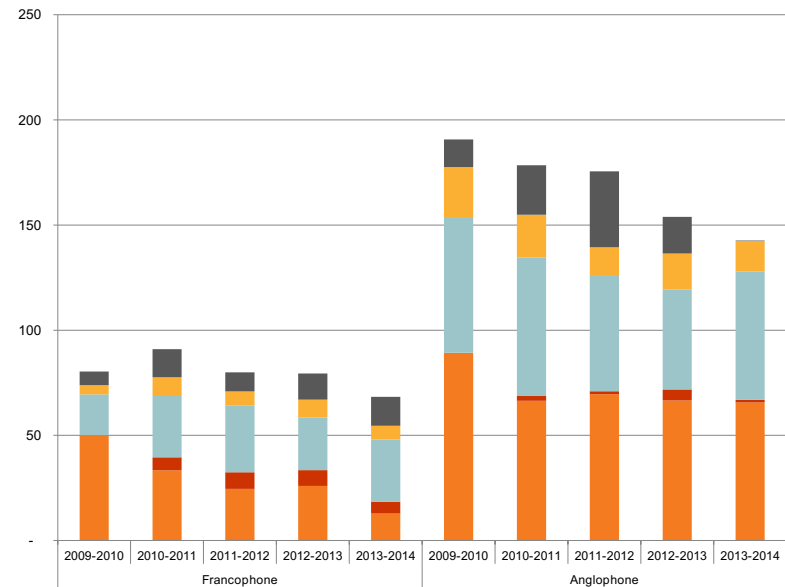
Fig.25 Comparative Changes in Attendance at Public Performances (Including Readings) by Francophone and Anglophone Creation/Production Companies (%)



Source : Canadian Arts Data (CADAC).

In terms of number of public performances (including readings), the 2:1 ratio again applies, with approximately 75 performances for the Francophone companies compared to 160 for the Anglophone ones. The companies feel that there has been a general drop in attendance since 2011-2012, with the worst performance for the entire five-year period recorded in 2013-2014.

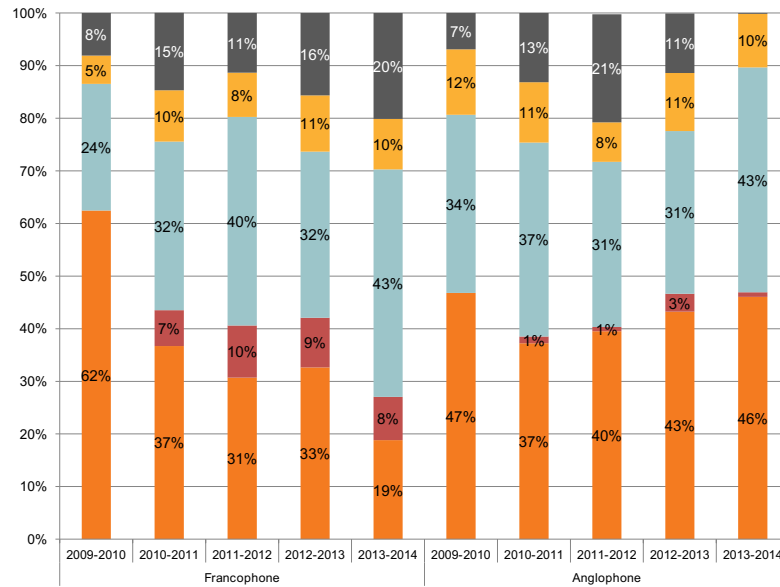
Fig.26 Comparative Changes in the Number of Public Performances (including readings) by Francophone and Anglophone Production Companies



- Number of public performances and readings produced by organizations and toured internationally
- Number of public performances and readings produced by organizations and toured in other provinces and territories
- Number of public performances and readings produced by organizations and presented in their province/territory
- Number of public performances and literary readings where organizations were presented by another organization in their city / town / reserve

Source : Canadian Arts Data (CADAC)

Fig.27 Comparative Changes in the Number of Public Performances (Including Readings) by Francophone and Anglophone Creation/Production Companies (%)



- Number of public performances and readings produced by organizations and toured internationally
- Number of public performances and readings produced by organizations and toured in other provinces and territories
- Number of public performances and readings produced by organizations and presented in their province/territory
- Number of public performances and literary readings where organizations were presented by another organization in their city / town / reserve

Source : Canadian Arts Data (CADAC)

Regarding trends, the results obtained for performances are a carbon copy of those for attendance. It is nonetheless possible, for the Francophone companies, to see that the decrease in activity is linked to the lower number of performances for local audiences, while with Anglophone companies; the reduction in activity can be attributed to a weaker performance in the area of international tours.

The respective involvement of Francophone and Anglophone companies in arts education and learning activities is not at all similar – being marginal for Francophone companies and an important area for Anglophone companies.

For Francophone companies, the number of activities per year averages around 30, with approximately 1,000 participants. Almost all activities are open to either adults or all age groups. Only two or three artists offer the activities.

For Anglophone companies, the number of activities per year averages around 155. The number of participants is in the tens of thousands – depending on the year – from 26K to 37K. Over 80% of the activities are intended for adults or all ages, and they constitute almost 90% of attendees. Activities for youth aged 15 to 24 are relatively rare, at one to four per year. Children under 15 are the target audience for about 20 activities that draw 800 to 2,700 participants. Many artists offer activities, although their number has tended to decrease over the five-year period, going from 53 to 29.

The significant disparity between the two language groups is probably due to how the dissemination is organized. In the Anglophone situation, school tours dominate and these activities are managed by the companies themselves. These companies therefore report these activities in CADAC. In the case of Francophone companies, especially in Quebec, dissemination is structured around specialized or multidisciplinary venues. Generally, it is these presenters that run the vast majority of activities that are educational or “add value to arts programming.

Tab.3 Comparative Changes in the Number of Activities, Participants and Artists Involved in Arts Education or Learning Activities and Programs Run by Francophone and Anglophone Creation/Production Companies

		Francophone					Anglophone				
		2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014
Children aged up to 14	Number of activities inviting participants to create work	1	7	4	4	0	9	21	25	21	21
	Number of participants in activities involving creating work	193	138	121	113	9	1,053	847	1,147	863	2,662
Youth aged 15 to 24	Number of activities inviting participants to create work	0	0	0	0	1	4	4	4	1	4
	Number of participants in activities involving creating work	100	38	76	74	106	95	54	64	61	1,171
Adults or all ages	Number of activities that add value to artistic programming	24	10	31	31	22	144	137	122	136	136
	Number of participants in activities that add value to artistic programming	689	339	1,425	1,215	757	36,140	31,264	25,509	25,618	26,002
Total number of activities		25	25	17	35	36	23	157	162	151	158
Total number of participants		983	983	515	1,622	1,402	872	37,288	32,165	26,719	26,542
Number of artists offering programs or activities as part of arts education		3	3	2	2	2	2	53	41	33	30

Source : Canadian Arts Data (CADAC)

Regarding human resources, the Anglophone-Francophone ratio of 2:1 applies generally to artists and employees:

- The number of artists in Francophone companies hovers around 22, while it is about 47 for Anglophone companies.
- The number of employees expressed in FTEs is approximately five in Francophone companies compared with eight in Anglophone companies.

Where governance is concerned, the number of board members is slightly greater in Anglophone companies, at eight or nine, compared to six or seven for Francophone companies.

However, when it comes to volunteers, there is a considerable difference. In Francophone companies, the total number of hours of work completed by volunteers grew over five years from 62 to 220. In Anglophone companies, the figure is six times greater, regularly exceeding 1,200 hours and reaching almost 2,900 in 2009-2010.

Tab.4 Comparative Changes in the Number of Artists, Employees, Board Members, Other and Volunteer Hours of Work in Francophone and Anglophone Creation/Production Companies

	Francophone					Anglophone				
	2009-10	2010-11	2011-12	2012-13	2013-14	2009-10	2010-11	2011-12	2012-13	2013-14
Total number of artists	20	22	20	24	25	51	43	51	42	50
Total number of employees expressed as FTEs	3	4	4	6	6	8	8	8	7	7
Number of members of Boards of Directors	7	5	6	6	7	9	9	8	8	9
Number of other volunteers	5	1	4	4	3	69	54	58	62	55
Estimate of the total number of hours of work completed by all volunteers	62	77	134	216	220	1,859	1,206	1,186	1,247	1,267

Source : Canadian Arts Data (CADAC).

Public performances (including readings) essentially account for the attendance levels for both Francophone and Anglophone companies, while the impact of community art activities on attendance is marginal. Public performances (including readings) by other artists or organizations represent around 10% of the attendance for Anglophone companies, while for Francophone companies, the attendance for such events grew from 8% to 22% from 2010-11 to 2013-14.

The Francophone creation/production companies do not offer subscription packages, while Anglophone companies attract several hundred subscribers, who represent 2-3% of total attendance.

The share of single tickets sold in the Francophone companies' home municipality or reserve is minimal. For Anglophone companies, the "proximity markets" account for 15-20% of total attendance.

Tab.5 Comparative Changes in Attendance by Type of Activity, Subscription Sales and Point of Ticket Sales, for Francophone And Anglophone Creation/Production Companies

		Francophone					Anglophone				
		2009-10	2010-11	2011-12	2012-13	2013-14	2009-10	2010-11	2011-12	2012-13	2013-14
Attendance	Number of public performances or readings produced by the company	10,868	17,155	15,422	13,821	10,356	48,307	51,264	53,901	43,426	32,446
	Number of public performances or readings produced by other companies	7	1,556	1,336	2,193	2,984	1,440	5,349	5,231	3,727	3,992
	Community art activities	159	9	15	30	33	126	136	149	222	105
	Total	11,034	18,720	16,773	16,044	13,373	49,872	56,749	59,281	47,375	36,543
Number of season subscribers		-	-	-	-	-	472	196	206	189	178
Number of tickets sold by subscription		-	-	-	-	-	1,662	1,333	1,599	1,239	891
Number of single tickets sold in the home municipality or on the reserve		1 475	711	543	458	75	10,763	8,664	8,912	7,860	7,222

Source : Canadian Arts Data (CADAC)

2.2.6 Activities for children and youth by non-specialised production companies (CADAC)

Many theatre companies that do not specialise in TYA nonetheless develop activities for these audiences. The total number of these activities is high and the number of young audiences reached is similarly high.

The data about these activities presented in the next two tables were provided by the Canada Council and taken from CADAC. However, these data, which come from a wide range of organizations in all parts of the country, were not verified. They are presented for information only and should be interpreted with considerable caution.

More thorough analyses would be necessary to determine whether the apparent upward or downward trends are due to regional factors or other specific contexts. Given the many variables, it is also difficult to simply compare these non-specialised organizations with their specialised TYA counterparts that constitute the previous CADAC sample.

One takeaway is that the volume of activity generated would justify more in-depth analysis of these organizations and their impact in the ecosystem.

Tab.6 Activities of “Non-Specialised” French- and English-Language Theatre Production Companies for Children up to 14 Years of Age

	Francophone					Anglophone					Total				
	2009-10	2010-11	2011-12	2012-13	2013-14	2009-10	2010-11	2011-12	2012-13	2013-14	2009-10	2010-11	2011-12	2012-13	2013-14
Number of new works commissioned from Canadian artists or created by them for children up to 14 years of age, which were presented or exhibited by your organization	6	4	7	3	4	16	19	13	18	21	22	23	20	21	25
Number of activities in which children created their own works	124	174	197	240	30	750	717	663	659	681	874	891	860	899	711
Number of participants in activities in which children created their own works	2,940	3,601	6,371	6,780	1,499	14,890	10,092	11,590	10,639	9,107	17,830	13,693	17,961	17,419	10,606
Number of activities designed for children	288	372	379	372	335	492	493	538	589	548	780	865	917	961	883
Attendance at activities especially for children or number of participants in these activities	43,474	38,803	31,288	44,973	45,045	107,948	94,976	111,003	83,729	80,322	151,422	133,779	142,291	128,702	125,367
Number of activities for all age groups especially children	2	35	24	25	29	146	123	96	125	196	148	158	120	150	225
Attendance at activities for all age groups especially children or number of participants in these activities	177	3,321	1,585	17,507	10,063	47,295	10,265	7,925	11,289	14,750	47,472	13,586	9,510	28,796	24,813

Source : Canadian Arts Data (CADAC)

Tab.7 Activities of “Non-Specialised” French- and English-Language Theatre Production Companies for Young People Aged 15-24

	Francophone					Anglophone					Total				
	2009-10	2010-11	2011-12	2012-13	2013-14	2009-10	2010-11	2011-12	2012-13	2013-14	2009-10	2010-11	2011-12	2012-13	2013-14
Number of new works commissioned from Canadian artists or created by them for young people aged 15-24, which were presented or exhibited by your organization	22	14	22	32	32	58	50	53	59	53	80	64	75	91	85
Number of activities in which young people created their own works	9	20	32	40	29	914	945	733	719	785	923	965	765	759	814
Number of participants in activities in which young people created their own works	1,335	1,943	2,244	2,436	4,152	9,587	15,290	14,095	14,220	10,297	10,922	17,233	16,339	16,656	14,449
Number of activities designed for young people	97	120	146	230	2,593	395	494	707	837	1,178	492	614	853	1,067	3,771
Attendance at activities especially for young people or number of participants in these activities	7,146	15,865	14,221	15,500	26,054	57,860	74,633	67,978	61,158	74,935	65,006	90,498	82,199	76,658	100,989
Number of activities for all age groups especially young people	2	30	19	33	2,394	203	173	173	247	278	205	203	192	280	2,672
Attendance at activities for all age groups especially young people or number of participants in these activities	334	17,152	14,691	11,769	8,140	9,366	15,868	16,168	31,521	30,232	9,700	33,020	30,859	43,290	38,372

Source : Canadian Arts Data (CADAC)

2.2.7 Organizations that present theatre for young audiences

The Department of Canadian Heritage compiles statistical data from its Canada Arts Presentation Fund (CAPF) program and has extracted data on specialist TYA organizations as well as on other organizations that program a youth series as part of their regular season. The youth series included are not exclusively theatrical. The data also covers children’s festivals that specialize in theatre as well as festivals that offer multidisciplinary programming.

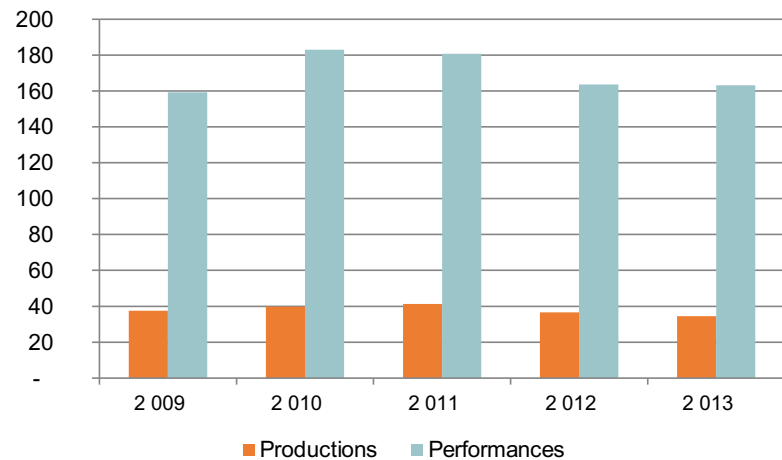
From 2009 to 2013, Canadian Heritage provided funding to 38 specialist organizations, 22 of which received ongoing funding during the 5 years. We only have fully compiled data for 16 of these organizations. These 16 therefore constitute our sample. Although this sample is implicitly diversified according to several parameters, any apparent trends should be treated with caution, particularly since these trends are not very pronounced and the five-year reference period is relatively short.

The findings presented are the average for the 16 organizations.

The number of productions presented fluctuated very little over the period. Following three years of growth, a peak was reached in 2011 at 41. The lowest number of productions during the period was 35 in 2013.

Total number of performances rose from 159 in 2009 to 183 in 2010. This level of dissemination continued into 2011, but then dropped to 164 for the next two years.

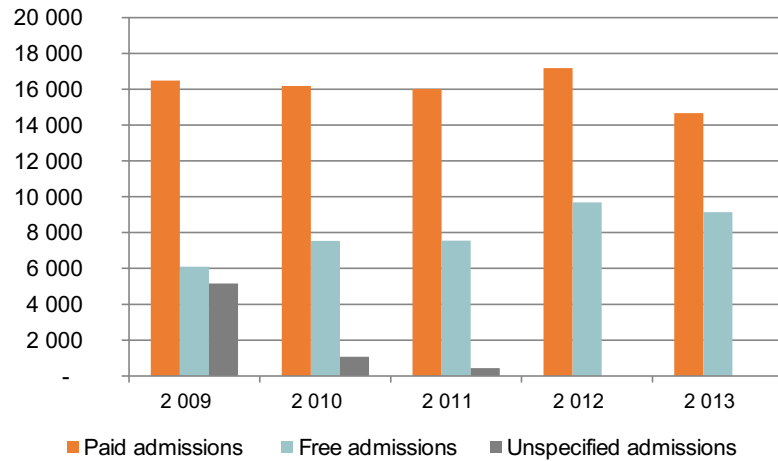
Fig.28 Change in the Number of Productions Presented (Solos/Ensembles/Companies) and Total Number of Performances



Source : Canadian Heritage, Canada Arts Presentation Fund (CAPF)

In terms of total attendance from 2009 to 2013, the overall trend is relatively stable. However, following a peak in 2012 there appears to be a slight drop in paid admissions, which has been offset by an increase in free admissions.

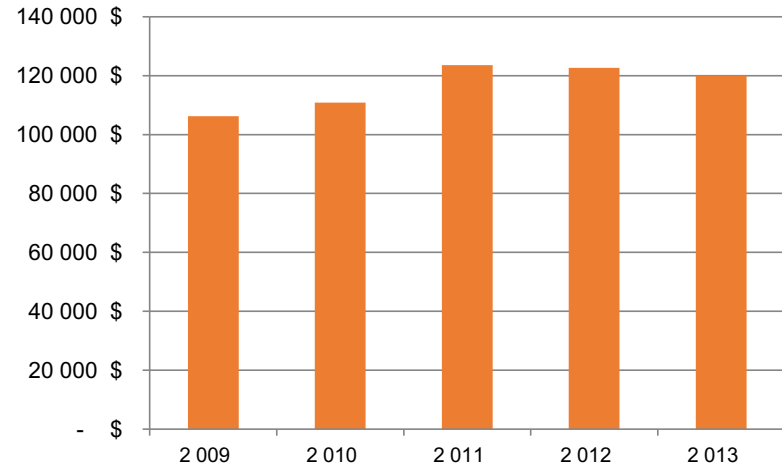
Fig.29 Changes in Total Attendance (Paid, Free and Unspecified admissions)



Source : Canadian Heritage, Canada Arts Presentation Fund (CAPF)

Programming revenues per organization increased considerably from 2009 to 2011 when they peaked at more than \$123,000. However, they have declined slightly since then.

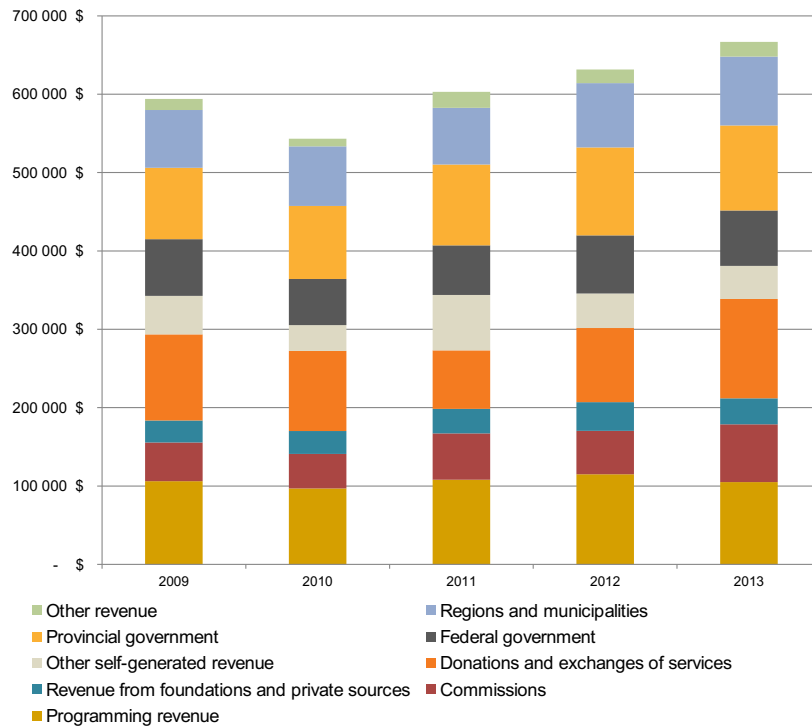
Fig.30 Changes in Earned Revenues from Programming (\$)



Source : Canadian Heritage, Canada Arts Presentation Fund (CAPF).

Over the period studied, total revenues earned by the organizations tended to increase and included a low of \$543,000 in 2010 and a high of \$667,000 in 2013.

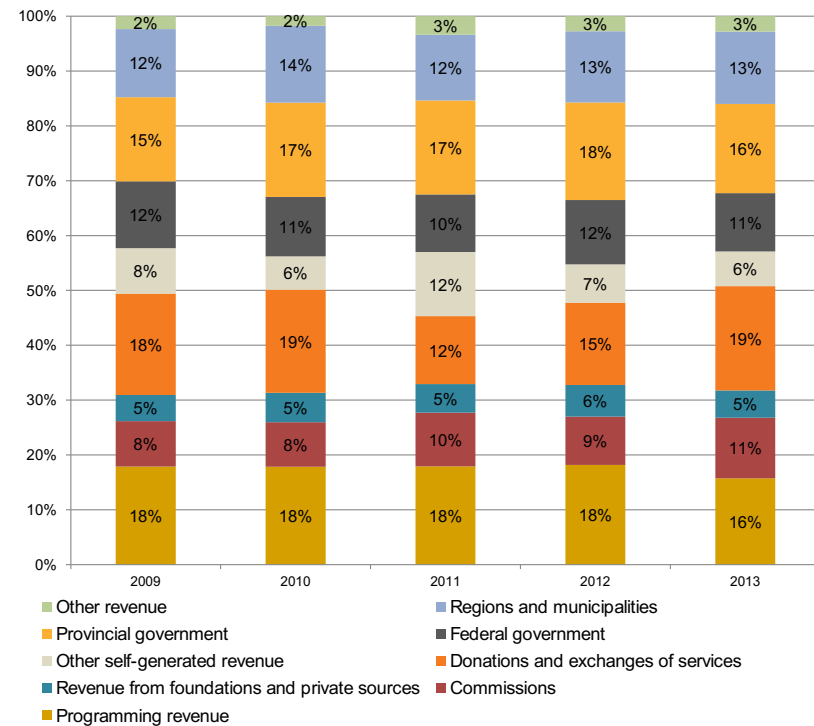
Fig.31 Changes in Total Revenues (\$)



Source : Canadian Heritage, Canada Arts Presentation Fund (CAPF)

During this period, there appears to be relatively little variation in the structure of total revenues. It is difficult to detect pronounced trends, except for possibly in commission revenue in 2013, in terms of both absolute figures and relative share.

Fig.32 Changes in the Structure of Total Revenues (%)

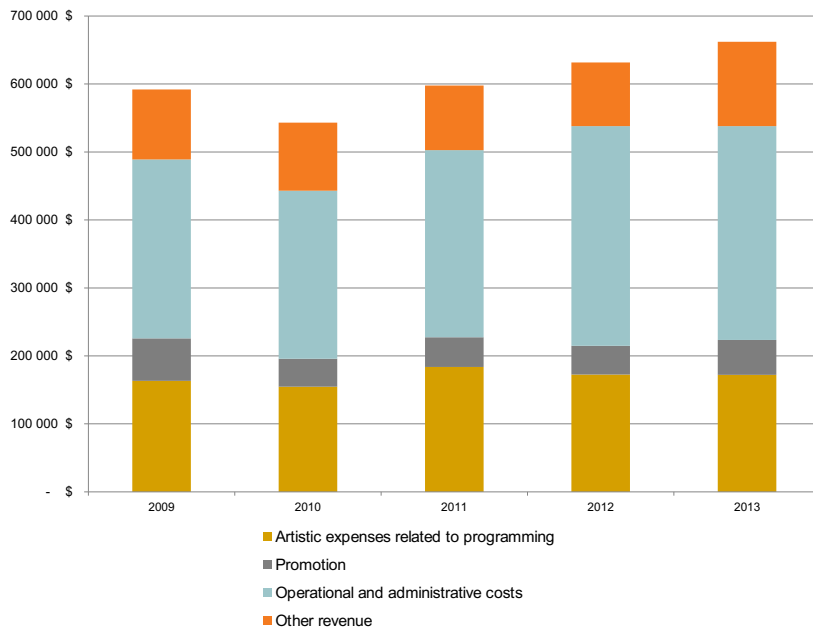


Source : Canadian Heritage, Canada Arts Presentation Fund (CAPF)

For the period studied, the organizations' total expenses followed a similar pattern to that for total revenues: an overall trend upwards including a low of \$543,000 in 2010 and a high of \$662,000 in 2013.

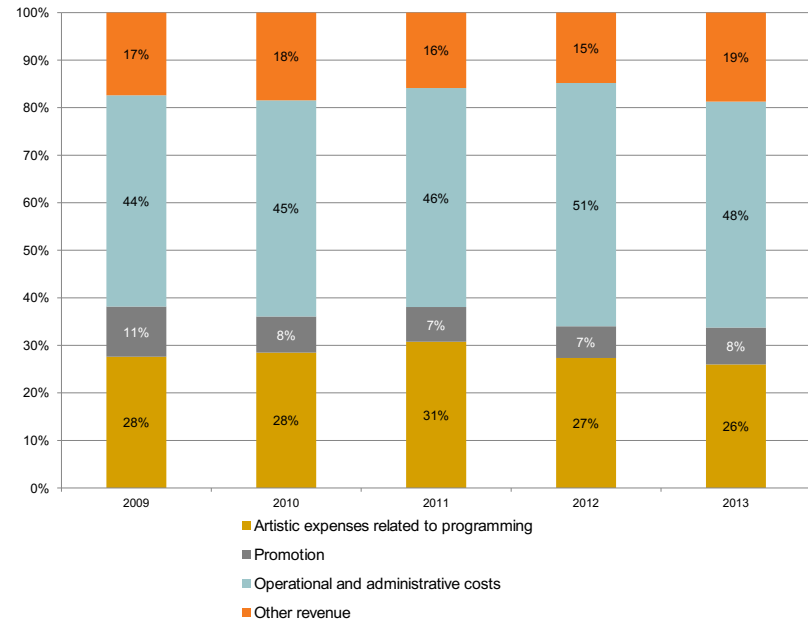
During this five-year period there appears to be relatively little variation in the structure of total expenses. However, we can discern a relative increase in administrative and operating expenses to the detriment of programming-related artistic expenses and, to a lesser degree, promotion expenses.

Fig.33 Changes in Total Expenses (\$)



Source : Canadian Heritage, Canada Arts Presentation Fund (CAPF)

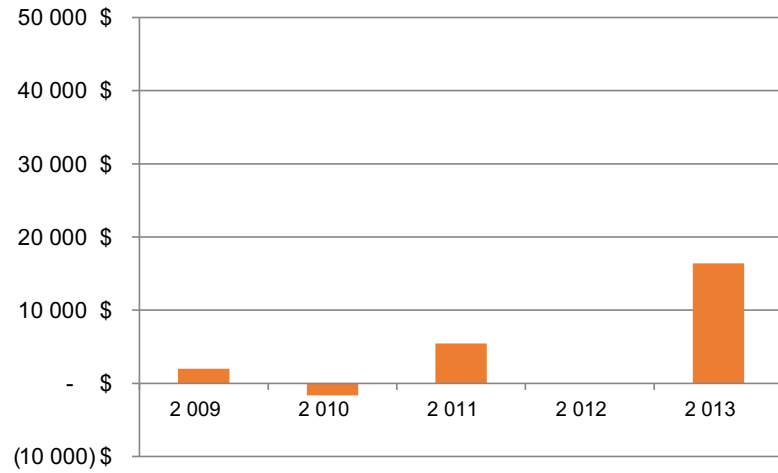
Fig.34 Changes in Total Expenses (%)



Source : Canadian Heritage, Canada Arts Presentation Fund (CAPF)

The overall trend for annual surpluses is positive except for a slight deficit of \$59 in 2012. A balance between expenses and revenues seems to have been maintained over the five-year period with surpluses never exceeding 1% of total revenue.

Fig.35 Comparative Changes in Annual Surpluses (\$)



Source : Canadian Heritage, Canada Arts Presentation Fund (CAPF)

2.3 OVERVIEW

Based on the secondary data available, it is only possible to produce a partial description of TYA realities and children's festivals across Canada. This description is a composite one that needs to be read with caution due to the methodological realities of the research on which it is based.

On the other hand, the Statistics Canada figures for the youth population by age group are well-founded. These figures clearly show that the numbers of children and youth (aged from 3 to 17) in most provinces have been dropping for the past 15 years. This information heralds an environment that is not quantitatively favourable for TYA and children's festivals in Canada. However, this data alone does not capture all the regional or provincial disparities in the country. Nor does this general information reflect changes in the socio-cultural composition of children and youth who are affected by the more or less sizeable presence of both immigrant and Indigenous ethnocultural communities.

The most complete picture that can be obtained is definitely the one for Quebec, the province that is home to most Francophone production companies. The data provided by the OCCQ show that, overall, from 2004 to 2014, the TYA and children's festival sector in Quebec reported considerable increases in attendance, performances and box-office revenues. Statistically, an increasing proportion of young Quebecers therefore have potential access to TYA.

The data for Quebec also reflect the important role of school audiences. This is evidenced by the teachers' boycott in 2005 that resulted in a collapse in overall TYA attendance in the province by more than 90%. The information provided by Réseau Scènes, a network of multidisciplinary presenters, seems to indicate the following audience breakdown: approximately 60% from elementary school outings, 20% from high schools and 20% from families in which the child is accompanied by a family member. These percentages have remained relatively stable over the past 11 years.

The reality for TYA production and dissemination in Quebec differs from that in the rest of the country. Francophone professional TYA companies in Quebec focus on creation and production and derive most of their income from performances. These companies usually perform in specialized, multidisciplinary and professional venues and very seldom in schools.

The Canada Council data taken from CADAC shows a relatively stable situation for Francophone professional TYA companies from 2009-2010 to 2013-2014. Over this short five-year period, their revenues and revenue structure remained stable largely due to substantial funding from provincial or territorial governments: approximately 40% of total revenues. The same goes for their expenses. The financial health of Francophone production companies remained sound with a maintained accumulated surplus. However, this financial stability has been parallel with a plateauing in attendance and number of performances which seem to have been dropping since 2010-2011.

The profile of Anglophone production companies is very different from that of their Francophone counterparts in that they operate as both production and dissemination companies. Most Anglophone companies use school theatres, art camps or even residences, and many focus on production and touring with most tours going to schools. All these factors mean that the budgets and activities of Francophone TYA companies are considerably different from those of Anglophone companies.

From 2009-2010 to 2013-2014, the revenues of TYA companies in Canada remained relatively stable. The main source of revenue was earned income, at more than 40% of total revenue. Over this five-year period, funding from provincial or territorial governments decreased slightly but this was offset by an increase in financial support from the private sector. During the three years from 2009 to 2012, a succession of annual deficits led to an overall accumulated deficit that has not been absorbed despite surpluses in the 2012-2013 and 2013-2014 fiscal years. Given the relative lack of change in revenues, the recovery of

financial balance can be explained by a reduction in expenses, mainly on the artistic front.

The Department of Canadian Heritage compiles statistical data from its Canada Arts Presentation Fund (CAPF) program. These data cover TYA organizations, those that program a youth series as part of their regular season, and children's festivals regardless of whether they specialize in theatre or not. From 2009 to 2013, Canadian Heritage provided funding to 38 specialist organizations, 22 of which received ongoing funding during the 5 years. Our data analysis focuses on 16 of these, which are geographically representative of the entire country.

The number of productions and performances fluctuated little over the period except for a slight decline starting in 2010. Total attendance was stable with a slight drop in paid admission being offset by an increase in free admission. Earned income has plateaued since 2011. Over the five years, both revenue and expenses rose in tandem, which preserved a financial balance. The structures of both expenses and revenues remained more or less unchanged.

To conclude, in a generally unfavourable demographic context in terms of potential audience numbers, TYA companies, whether specializing in production or dissemination, appear to be holding their own. Their documented stability definitely reflects a form of plateauing rather than decline. Needless to say, these average data mask a diversity of realities and do not indicate individual successes or failures.

SECTOR DYNAMICS

3.1 NOTE ON METHODOLOGY

To analyze the dynamics of the TYA and children's festival sector, we surveyed a group of respondents who were most likely to provide information on the state of audiences. This survey took two forms: semi-structured telephone interviews and focus groups.

Overall, our primary sample consisted of organizations receiving operating support from the Canada Council for the Arts and whose activities are mainly related to theatre and directed at young audiences. Among them were creation/production companies with or without their own facility, specialized presenters and festivals, and a number of organizations that combine production and dissemination. This sample also included organizations supported by Canadian Heritage through the Canada Arts Presentation Fund; festivals targeted at young audiences as well as presenters with a targeted youth series. In all, the primary sample comprised nearly 70 organizations from 10 Canadian provinces, although the distribution by province was uneven.

We also selected a secondary population based on the knowledge and expertise individual respondents could contribute. This group included institutional players, dissemination agents and networks, multidisciplinary presenters and a few individuals who are particularly well informed about interactions between the performing arts world and the education sector.

Two focus groups – one in French and the other in English – were organized in January 2016 to coincide with the International Performing

Arts for Youth (IPAY) event³⁶ in Montreal. The groups were convened by cross-referencing our primary population with a list of organizations that had announced their intention to attend IPAY in Montreal. Invitations were issued via email. The Francophone group included nine individuals from eight organizations who accepted the invitation and participated in a discussion that lasted 1hr 45 min. The Anglophone group was made up of six individuals from five organizations for a discussion of just over 1hr 30 min.

For the telephone surveys that were conducted from March to May 2016, we aimed for a primary sample of 30 respondents, which represented almost half of the sample identified. We also contacted 6 individuals from the secondary sample. Our selection of respondents was intended to cover the various criteria on a proportional basis. We were also careful to reflect the diversity of the organizations' activities – production, specialized presenting and presenting as a series or as part of a festival. Target client groups also entered into our selection criteria – very young children, children or teens. Once the respondents had been identified, they were contacted via email and then by telephone to set up a time for a semi-structured telephone interview of an average length of 45 minutes. We should note that the 13 organizations that had already taken part in the focus groups were excluded from this sample.

³⁶ IPAY is an international convention/showcase for youth audience performing arts. The event is held alternately in different cities in North America.

3.2 CONSIDERATIONS IN INTERPRETING THE DATA

Although the focus groups and telephone interviews involved different dynamics, the questions that were used to guide the conversations (see Appendix 2) were essentially the same and the answers provided in the two situations proved to be quite similar. For the purposes of this report, we have therefore chosen to pool the results for a general analysis and to identify recurring themes and the significant characteristics of varying contexts.

We must note that, from the outset, our invitations to participate in focus groups and telephone interviews were positively received, with a fairly high response rate for this type of survey. We sensed a high level of enthusiasm at the idea that the Canada Council for the Arts would want to look at the challenges faced by this sector. When we were setting up the interviews, several organizations were willing to make more than one respondent available to ensure that our questions would be answered completely.

Generally speaking, what came out of the majority of interviews was a fairly positive view of the sector's evolution and prospects. Of course, each respondent has to deal with many challenges, depending on the sector, activity type and target audience, but a critical view was often accompanied by suggestions for solutions or best practices that the interviewees could see implemented.

3.2.1 How the sector operates

The main difficulty in synthesizing our results has been due to widely differing situations in terms of both the organizations' activities and the geographical context in which they are carried out. For creation/production companies, two main associated realities emerged that sometimes overlap but which undoubtedly influence the perspective of the individuals we interviewed. This has to do with the practice being essentially based on presentation in professional venues for Francophone creator/producers in Quebec, and consisting for the most

part in school tours for their Anglophone counterparts. There are practices that combine the two, and most of the Anglophone companies also tour to professional venues across the country. The reverse is almost never the case for Francophone companies in Quebec, or at least not for the organizations that participated in this survey, whose activities in schools are generally limited to workshops. As for the Anglophone companies in Quebec, they also tour mostly to schools.

By contrast, the practices of Francophone companies located elsewhere in the country can vary with the region visited and the basic nature of the production. This kind of variability was also mentioned by a number of Anglophone companies.

This major difference is important in that it determines how a company gains access to its clientele. In Quebec, since dissemination is structured around specialized or multidisciplinary presenters, selling shows and gaining access to audiences are necessarily achieved through this sector component. The companies have access to presenters through personal contact with an internal staff member or through outside agents. This is also how Anglophone companies that perform in professional venues operate.

The other major distinction reported to us concerns how the work is organized. This aspect is determined by the two artists' unions that represent most performing artists in Canada: the Canadian Actors Equity Association (Equity) and the Union des Artistes (UDA). However, there are substantial differences in the respective collective agreements that these two unions negotiate on behalf of their members. In the case of the former, the performers' work is structured in terms of number of weeks, whereas for the latter work is expressed in number of hours. The Equity-negotiated structure thus forces companies to limit creative work to a more focused and shorter timeframe. In contrast, under UDA contracts, companies can choose to spread out their creative period over several phases. A weekly pay scale also requires continuous weeks of many performances to maintain profitability, whereas the

performance-based option with UDA allows for a degree of flexibility in accepting bookings.

For companies whose dissemination is based on school tours, the mode of accessing their clientele is diverse, not to say complex. In some provinces, there are organizations whose function is to act as a bridge between the education system and production companies. The companies are therefore able to promote their productions by means of professional showcases and catalogues, and school networks can book a very high volume of shows for their member schools. These centralized systems do not give everyone access to the school market, in which case the companies must rely on an agent or internal resource-person to contact the school networks directly or each of the schools individually.

The complexity of gaining access to young audiences in a school context, alluded to above, results from a huge disparity in the school system's operations. First, we should speak in terms of systems in the plural, since they differ from province to province. And on a regional level, where the schools are generally grouped under boards or commissions, the booking process may be centralized in a committee or a cultural/educational adviser, or it may be decentralized and entrusted to each educational establishment. At the individual school level, practices are apparently just as diverse: the responsibility could reside with the administration, a committee made up of parents and staff members, or specific teachers to whom it has been assigned.

This description of access to schools is from the companies' viewpoint, but the same essentially applies to presenters and festivals that deal with these client groups regarding school outings. On the other hand, we must note that school outings are sometimes decided by individual teachers, class by class, which adds another level of difficulty. We will come back to this later.

The children's festival sector is extremely diversified and even full of contrasts. For example, the organizations covered by this research

include festivals and other events that primarily present special-interest theatre programming and other organizations that present multidisciplinary series. In fact, some of these shows are initiated by municipalities that want to offer cultural enrichment to their residents. The intention here is to enliven public space in the community and please but not shock. For arts-discipline-specific festivals that are duty-bound to advance their particular discipline – theatre, in this case, – their programming can be more daring and ground-breaking.

The same kinds of contrasts can be found between TYA presenters and their multidisciplinary counterparts that offer series of youth-audience shows in a range of disciplines. The latter are generally located far from major urban centres and serve a smaller audience due to the relatively long distances between neighbouring communities.

3.2.2 A growing, diversified supply

According to almost all of our respondents, the supply of performances and activities for young people has increased not only in volume but also in diversity. Presenters, festival programmers and the production companies themselves said that more companies are now circulating works intended for young audiences.

In addition to the companies that have traditionally specialized in this sector, our respondents have noted an increasing number of companies that alternate between productions for the general public and those for children or teens. The main reason cited is a desire to explore different themes or forms. Among our respondents, a number observed that they have moved in the opposite direction in opening up to client segments they did not traditionally target, such as a slightly older group aged 15-19 and even young adults.

Respondents also mentioned that only a few years ago, certain artistic disciplines were much less present in this market segment. Dance and circus arts in particular have established themselves in and are now offering productions that are being programmed for youth series or

festivals which were almost exclusively reserved for theatre in the past. This apparently abundant supply obviously has an impact on the potential for bookings in professional venues as well as schools.

On another level, presenters and festival programmers in turn have to deal with a supply they describe as proliferating. Their clients, both schools and families, are being courted on all sides and find themselves facing an increasingly broad range of selection. This tailor-made supply is being offered by sources as varied as national and regional museums, zoos, interpretive centres for nature and science and so on. Apparently sporting events and large-scale commercial productions on tour – often from the United States – can also siphon off a significant portion of the client base in certain locations.

Our respondents told us that a standard feature of theatre activities for children and youth has always been the inclusion of additional activities, such as workshops and pre/post-performance discussions. At this point, the phenomenon has clearly become more widespread. At all levels of the supply chain, the buzzword is enrichment, whether on the pedagogical or artistic level. Some respondents cited enhanced school requirements, while others maintained that these activities provide a way to make their proposal stand out amongst others.

With reference to festivals and certain presenters, a growing interest was noted in productions that are more spectacular in terms of cast size, sets, costumes and lighting. While such shows are a big draw, they cost more to produce, and it is practically impossible to increase the ticket price for schools as well as families. A few presenters reported a significant drop in attendance immediately following a increase in ticket prices. In at least one case, they had to reconcile themselves to reducing their prices, which had a positive effect on attendance.

For productions intended for schools, given the obstacles to increasing their fees and the growing production costs, creator/producers mentioned reluctantly reducing the number of onstage actors. At least one company reported having gambled on mounting a more lavish

production than usual, so as to set itself apart from what was generally on offer. In that case, the gamble paid off and they were able to organize a tour with a record number of performances in both their home province and elsewhere in the country.

3.2.3 Audience segment dynamics

Our sample of respondents covered the entire range of target age groups, making it possible to identify some of the trends in different audience segments. Clearly, what circulates most widely and successfully is theatre intended for children aged 8 and under, both in schools and professional venues, for school as well as family outings. Very young and pre-school-age children seem to be reaping the benefits of a decided fad. Our respondents noted that parents are “very motivated” where family outings are concerned. Beyond instilling an interest in culture, it seems to be a trend in our modern society to stimulate young children in every possible way.

However, they observed that when group outings for daycare and early childhood centres are involved, travelling distances has to be limited, which led to talk of “proximity to clients.” Some of our respondents pointed out that the younger the group, the smaller the venue must be. This is especially the case with children under three. Although the shows are popular and sell well, they are expensive to produce and require special logistical arrangements.

Our respondents also noted that between the ages of nine and twelve, children reach a stage at which they become increasingly aware of their own power and status within their schools, especially in relation to younger children. Many of them consider theatre for young audiences to be childish (“for babies”). Presenters and companies agree that they must therefore pay particular attention to this segment’s expectations. It becomes a problem in situations where, in order to foster school spirit, all the age groups are brought together to watch the same performance. While for the youngest children the experience of watching a show intended for an older group might seem to have no significant lasting

impact, aside from the fact that they did not understand it, older students express their displeasure more openly and leave with the impression that young people's theatre is not for them.

As for teens, while several companies and presenters mentioned having practically given up on this audience segment, many have continued to work with it successfully. They maintain that teens have simply changed and want to see presentations with value added. They talked about shows enriched with workshops or participation in a creative phase and shows that are close to the audience's own experience. It was generally agreed that approaching this age group requires a greater commitment and often collaboration with the teachers who prepare and guide the students. For these reasons, this dynamic calls for resources that are not within everyone's reach, which would explain why some companies have withdrawn.

On another level, several respondents remarked that socioeconomic conditions in a school's region can have an impact on access to shows. However, contrary to what we might assume, the poorest communities are not necessarily the worst served. While so-called rich client groups generally have the necessary means to participate, those in poorer regions seem to have increased access to special assistance that enables them to host shows or watch theatre for free or at low cost. In the opinion of observers, it is the middle class that would in some ways be left on its own.

3.2.4 Cultural participation or cultural mediation?

While the literature we reviewed on the issue of attendance made frequent reference to the broader concept of cultural participation, we found little direct reference to it among our respondents, albeit somewhat more from the Anglophones. One possible explanation for this is that some organizations that are focused on their practice lack the distance required to assess the phenomenon of cultural participation as a whole. In many cases, we noted confusion between cultural participation and cultural mediation, the latter being more familiar to

most respondents and generally taking in all approaches and activities intended to get the populace involved with culture. The distinction seems to be less confusing on the Anglophone side thanks to the use of the terms "cultural participation" and "outreach activities" as well, while Francophones rely almost exclusively on the term "médiation culturelle."

All of the organizations with whom we spoke emphasized how important outreach (cultural mediation) is to their activities. However, the great majority of these activities are closely linked to attendance at a show, as either preparation or follow-up. Some companies said they mounted workshops for young people, especially teens, to stimulate their own creative process, but this did not involve massive numbers of participants – in the cases cited, no more than a few dozen.

Another distinction between the two linguistic communities is that on the Anglophone side outreach activities are mostly created and delivered by the companies themselves, whereas for Francophone companies, the bulk of their dissemination is channelled through professional venues whose specialized staff are primarily responsible for creating and organizing these kinds of activities.

Even if they are approached to provide coaching with respect to the creative process for in-school productions, few engage in this activity. It is generally viewed as the school's domain. Some regional children's festivals have nonetheless ventured into this area by programming shows created by children in the school environment with the participation of professional artists as advisers and mentors. The festival then functions as an opportunity to use the arts to bring together widely dispersed communities for interaction with each other.

Some organizations expressed the fear of seeing a gap develop between arts in schools and professional practice. A few cases were mentioned where a school, instead of paying for a professional show, spent energy and money on producing a show by its own students (with one school even touring its show to the other schools in the area!).

However, based on all our interviews taken together, it would seem that this phenomenon is not currently widespread and is actually quite rare.

3.2.5 Connections with the education system

Although audiences for family outings represent an important component of the TYA and festivals sector, the dynamics of most players' activities are really driven, directly or indirectly, by their connections with the schools. Almost all our respondents underscored their dependence on educational institutions. It was frequently stated that the health of the education sector greatly influences the entire supply chain of professional arts intended for young audiences.

Budget cuts for schools were also mentioned by almost all interviewees. Such cuts involve not only the money available for booking shows, but also the issue of school transportation, to which we will return later. At the same time, it has become harder and harder to ask for additional contributions from parents, who are sometimes already paying for other activities and even for school supplies. The same applies to private schools – we might assume that the parents have more money, but tuition fees are also much higher.

Labour relations within the education sector are a concern for many key players. Every time there is a dispute during negotiations between governments and teachers' unions, they have witnessed significant and even devastating effects. In particular, pressure tactics related to these disputes have been used in Quebec, Ontario and British Columbia. While some tours were delayed, others had to be cancelled. Programming shows is often likened to a domino effect whereby changes to one company's itinerary in a given area can affect the activities of companies, presenters and festivals in a completely different region.

There are other signs that the education system's issues or choices affect the arts world. Organizations that are active mainly in provinces where theatre is not part of the primary-level curriculum insist that they

are at a disadvantage. When they visit schools in other provinces where such programs are in place, they find that they have more rewarding interactions with children and teachers. There is evidently a slightly greater development of cultural capital in those communities.

To a great extent cultural capital also resides in school staff with a history of theatre attendance, whether at professional venues or the schools themselves. That is why, when our respondents talk about audience loyalty among school clients, they are referring to these staff members and not to the children. Whereas the children grow up and move on, the staff remains.

Nonetheless, as each changing of the guard in a school demonstrates, it is risky to rely on the loyalty of individuals rather than a general policy or, as mentioned by some of our respondents, social and community planning. This does not seem to be merely utopian thinking, since many of the best practices we noted or had reported to us involve communities that have actively promoted access to the arts. Companies that have visited these communities emphasize the difference made by this kind of mobilization. The presenters who operate there point out that it is much easier to do their work, find partners and, ultimately, fill their seats.

When an interest in the arts is expressed at a school's administrative level, getting traction is much easier; on the other hand, respondents notice greater engagement among management than teaching staff. Many of the individuals we interviewed noted the current wave of retirement among baby-boomers at all levels of the school system which invariably loss of contacts that have been fostered and maintained over years. This know-how is not always passed on, and young teachers have to start from scratch.

3.2.6 Connections with the academic curriculum

The issue of the school curriculum is another topic that surfaced in almost all our interviews, and the attitude seems ambivalent. On the one hand, respondents hope that teaching programs will encourage cultural participation in a variety of ways, including attending and appreciating professional productions; on the other hand, there is caution regarding the impact curriculum requirements might have on artistic content. Since the curriculum determines a significant portion of the teaching that takes place in schools, most teachers naturally and reflexively attempt to make connections between artistic works and the themes in their lesson plans. This concern for efficiency leads some to assess the potential of productions for young audiences solely in terms of their ability to meet such pedagogical needs. This in turn can lead to the neglect of other aspects whose transmission is equally important, such as the calibre of an aesthetic event or simply the magical experience of theatre. Some creators/producers talk about various cases in which individuals in the school system contacted companies or presenters with specific demands and even requirements related to the target themes for a particular grade. However, these are extreme cases.

Few completely escape this phenomenon, but it seems that shows intended for schools are the most susceptible to being required to put considerations of pedagogy ahead of all others, and companies are being asked to include more and more detail in their teacher's guides. At the same time, it can be difficult to ensure that these guides reach the individuals who will make the decisions. As mentioned earlier, the supply of activities is steadily growing, and it is becoming harder to stand out from the competition.

Some of our respondents mentioned that teachers are becoming overwhelmed with work and lack the time to make connections with their curriculum, and it is sometimes the staff of companies, presenters or certain festivals who take the trouble to contact them and point out the possible applications to the material being taught. Even if this time investment adds to their workload, respondents consider it essential.

Some educational bodies, such as cultural committees or parent councils, want a guarantee of pedagogical relevance before they will authorize activities or outings. On the other hand, it was noted that when intermediaries are involved, such as agencies or networks, it becomes harder to make direct connections with school-system players in order to obtain rapid responses to questions.

Along these lines, the issue of training teachers was also brought up several times. According to our interview findings, it seems that teachers do not always have the necessary preparation to include artistic activities in their courses. Several presenters and festivals have organized sessions for teachers on how to organize outings, which are very useful to them when helping their young charges discover the artistic world.

The issue of a show's thematic content has impact on another level, beyond that of curriculum. On occasion, more sensitive material has led to certain shows being excluded outright from some networks. The same show can be received enthusiastically in one region and censored in another. The respondents who discussed these situations said instances of censorship sometimes resulted from a rumour or a misapprehension. In two cases, the bookings were made through regional agencies and there was no direct contact between the companies and the schools, which made it more difficult for the companies to establish the facts with concerned individuals. In this respect, having a relationship of trust with school representatives is an important factor. Certain creators/producers mentioned that it is sometimes possible to present very sensitive material, such as suicide or even same-sex parenting, as long as the various players have been adequately prepared.

The ultrasensitive character of a work's title is a very real phenomenon corroborated by several respondents. Although this issue is not exclusive to TYA, a work's title can have a telling effect but in situations where great attention is paid to show selection. As in the instances mentioned above, one word can be enough to arouse suspicion. On the other hand, respondents emphasized that if a title makes even a vague

reference to a work of children's literature or a well-known character, it can be reassuring and open many doors. The issue of literary connections came up repeatedly – in many communities theatre still maintains its close connection to literature.

It is clear that TYA lies at the intersection of art and education. Many of our respondents express the hope that government departments responsible for education and for arts and culture will more effectively coordinate their programs and actions.

3.2.7 Important decision-making factors

For a school, any onsite theatre presentation or outing to a cultural facility means disrupting the routine and having to adapt schedules and resources. The ability and will to adapt are therefore listed among the principal factors for success or failure in developing contacts within the various school systems. In addition to an interest in theatre on the part of teaching staff and administrators, we were told that direct experience is often what distinguishes the individuals who will take the lead in organizing school outings. In other words, it takes special abilities to negotiate the many administrative hurdles involved.

The question of cost is certainly considered to be the principal factor in decision-making. Budget cuts introduced by many of the provinces have noticeably reduced the flexibility of school boards and institutions. Many of them have even been obliged to organize fundraising activities with their parents' committees to provide cultural activities for the children. This uncertainty about their ability to book shows naturally has an impact on the artistic choices of creation/production companies. In most cases, as previously described, the temptation is to reduce the scale of a production in order to accommodate the schools' budgetary limitations.

For presenters and festivals working with schools, there is an additional hurdle between them and the audience they intend to reach: once the cost of admission for each child, teen and accompanying adult has been collected, the schools then have to transport them to the venue. In an

urban environment, some schools use public transit, but they are in the minority. Transportation by rented bus is favoured by most communities and is often a determining factor.

Since transportation also takes time, organizing outings calls for a special form of logistical gymnastics that includes the adult-to-child ratio, union rules, the children's lunch hour and snack time, open hours for childcare services upon return and much more. We were told of two cases in which the presenters had only one performance for school audiences in the morning, while in the past they had presented two per day. In this particular instance, changes in the schools' schedules had rendered it almost impossible to organize outings in the afternoon. The changes obviously affected the shows' viability, since programming activity expenses could no longer be recovered at the same rate. This type of situation is limited to particular regions, but it illustrates the importance of the schools' logistics and internal organization.

The cost of transportation was cited as a major determining factor in most of our interviews. Quebec seems to be the only province to offer cultural outing transportation assistance. The program, which was formerly administered by the government's department of culture, was moved to the CALQ (Quebec's art council) at the same time as the program of aid to presenters. This program offers reimbursement of up to 40% of the transportation costs incurred, although most reimbursements are reportedly in the order of 25%. Some presenters, though not all, who receive a predetermined amount must forward the schools' requests. According to what we were able to gather, the availability of this assistance is often a deciding factor in organizing a theatre outing. Some presenters have even managed to find partners in their community who can finance the portion not covered by the government program. Organizations located elsewhere in the country mentioned occasionally being able to secure non-governmental funding from sponsors or foundations to facilitate transportation.

3.2.8 Other phenomena and observations

Regarding show programming and dissemination, some respondents noted that funding for tours is not equally available across Canada. Some provinces are more generous than others, and the Canada Council struggles to meet the demand. In some cases, it seems that this situation limits the ability to reach a larger audience or to host companies from other parts of the country.

Some interview respondents highlighted how the economic crisis of 2008 reduced access to private-sector contributions in the form of donations or sponsorships, which then had an effect on the funding of certain special projects with schools. More widely, the crisis had a very negative impact on some markets in the United States and Europe, which led certain companies to severely curtail dissemination in those markets. Since project planning often includes covering production costs by a high volume of performances, the loss of these markets forced companies to focus more intensely on markets here in Canada. The reduction in revenues from abroad affected co-production funding, which for some companies represents a substantial portion of the creation budget.

Companies with their own facilities seem to fare better than those without. Although in certain cases the financial burden has forced companies to rule out the possibility, they mentioned that having a home base has clear advantages in terms of opportunities and audience relations. Contact with young people is increased by offering regular workshops. It also becomes possible to host other TYA companies and occasionally play the role of presenter. The host companies can then offer their audiences more diversified programming. For example, if a company creates shows that are mostly for teens, it can bring in companies that produce work for younger children. This helps to strengthen their role in the community.

3.2.9 Some best practices

Discussion in the interviews regularly focused on the sector's issues and challenges. With respect to certain problems, respondents made frequent reference to solutions or best practices implemented elsewhere. For instance, regarding the disparity in practice across the country or the lack of serious commitment to arts in schools in certain regions, many recalled the old dream of making theatre outings mandatory. An example of this is the Netherlands, where each child is required to see at least one show per year. Belgium has also introduced measures tending in that direction; however, companies that wish to participate in the official program must first pass an examination to obtain a certification of quality.

Most of our respondents are convinced that audience development is a solution that needs to be prioritized, but this implies specialized and suitably-trained staff. Special-interest presenters usually possess this type of staff and manage to maintain year-round contact with schools. However, that does not seem to be the case for many regional multidisciplinary presenters.

To overcome the distance between a company's main venue and the schools, some companies rent or are thinking of renting satellite venues on an occasional basis in order to get closer to more institutions. This would help to reduce the impact of travelling time on the schools' logistics.

One organization told us about a promising initiative to create an interactive platform that would highlight the educational value of a show's various elements. This tool would get past the administrative hurdles set up by the school bureaucracy and engage teachers in a more constructive dialogue.

Instead of blindly competing with what is offered in music and dance, one presenter described a project that has been operating for several years and consists in taking a combined approach to the market with

other organizations: they collaborate on promotional planning and package deals; they create a booklet and website for the group, which produces a greater impact in the schools; and they anticipate finding additional partners among museums to enrich their collective offering and promote the organization of multi-activity outings for certain schools, whenever possible.

3.3 HIGHLIGHTS

The diversity of survey respondents perfectly reflects the fact that the TYA and children's festival sector is a composite one containing many sometimes highly contrasting realities. The respondents' views often reflect an incomplete grasp of the overall sector – more a regional or provincial perspective, but very rarely a national one.

The general impression is that the cultural supply for young people has expanded and become more diversified. Other arts disciplines like dance, circus and song have come on the youth audience scene, whereas they used to be almost totally absent. For producers, this has resulted in fiercer competition, while for non-specialist presenters including festivals, this has presented more opportunity to offer varied programming.

At the same time, producers feel trapped by the difficulty in raising their prices, which exerts pressure on the smaller, more conventional venues. The effect in some cases is to essentially dumb down what is presented. On the other hand, some producers take risks and successfully set themselves apart with more ambitious shows.

Although audiences continue to be segmented by age, new segments, like infants, have appeared. It seems that the younger segments are experiencing the most growth, whereas older age groups, like teens, have become more challenging to reach and attract. However, this impression is not universal.

Although the concept of cultural participation was very prevalent in the literature review, we heard little about it when conducting our survey. We of course had formulated specific questions on trends in taste and habitual behaviour, but few of our respondents seemed able to answer them, despite our insistence.

Since the vast majority of organizations largely depend on schools as clients, respondents talked more about teachers' preferences than those of young people. The constantly-changing pattern of cultural participation already mentioned seems in all likelihood to be taking place more in the schools or the private realm of the family, and appears to be far removed from our respondents' perceptions.

With Francophones, the concept of cultural participation resonates less, but this is certainly due to confusion with the term "cultural mediation" (outreach). In fact, cultural mediation activities that are more participatory are becoming an increasing part of the cultural spectrum.

To some extent, the same is true of new technologies, social networks and the online consumption of culture. When respondents were asked about the development of these practices among young people, few of them felt prepared to draw any conclusions. They recognized the phenomenon but were not in a position to assess its extent or its impact on their activities.

The connections between TYA and the school system are important and indispensable. Any change in school organization has immediate effects on artistic programming for children and youth. In fact, due to the growing complexity of student transportation-related logistics and costs, many schools have totally eliminated outings or reduced them significantly.

For their part, some teachers feel obliged to make connections between a particular show's themes and the academic curriculum. This exerts pressure on creators to meet a certain demand, which particularly

affects companies that primarily do school tours as opposed to companies that usually perform in professional halls.

According to our respondents, school budgets seem to have shrunk considerably, which makes schools all the more sensitive to the cost of student attendance at shows. Any ticket price increases thus have an immediate downward impact on attendance. On the student transportation front, organizations that manage to arrange funding for this purpose are naturally more successful.

For some companies, having their own facilities seems to be a significant advantage despite the major costs entailed. Their facilities make them more rooted in their respective communities and sometimes present shows other than their own.

In general, the ability of an organization to connect with other key partners in the community is a success factor. The community then takes ownership of the goal of giving its young people access to good-quality artistic shows, and it becomes much easier to coordinate together and collaborate in order to meet the many potential challenges involved.

CONCLUSIONS

4.1 FINDINGS

The purpose of this exploratory study was to prepare an analytical picture of the TYA and children's festival sector in Canada. Several research questions guided the work and it was possible to find at least partial answers to most of these questions. In some cases, a lack of complete data highlighted the need for further research.

Public participation in artistic programs for children and youth is determined by a whole slew of factors. Some of these factors involve how the sector's organizations operate in certain regions, while others involve social phenomena that are still difficult to discern.

Increased audience segmentation

The audience in question is far from homogeneous. Both the literature review and the actual research demonstrated that participation by various age groups in artistic activities is evolving in different ways. The theatre community has become very adept at targeting increasingly precise age groups and offering activities that effectively match the preferences and capacities of children and youth. On the other hand, various constraints linked to certain dissemination settings — assembling all the children from the same school in a gymnasium or auditorium, for example — sometimes militates against efforts to offer the best possible artistic experience.

This increased segmentation of young audiences is also reflected in the relatively recent emergence of activities and works for even younger children — those under three years old or even babies! Based on the statistics available, it has not been possible to quantitatively measure this phenomenon, but our research has produced several useful observations:

- Growing numbers of children are beginning their experience of art at an earlier age than before;
- Daycares or early childhood centres that are responsible for infants have become new players in the sector;
- Due to age-related constraints, these artistic experiences generally take place close to presentation venues.

A diversified ecosystem

The TYA and children's festival sector is composed of diverse segments consisting of presenters, festivals and creation companies varying in size and mission. As a result, the challenges are not always the same and basically depend on a particular organization's position in the ecosystem of arts for a young audiences.

According to the particular circumstances, these challenges can be demographic (population decline, ethnic diversity, etc.), geographic (isolation), political (government priorities) or economic (local or even national crises). For organizations with international activities, a recession in markets abroad can have a domino effect on local activities.

Transformation of cultural participation

Several studies imply that the world of culture is currently undergoing a profound transformation that will inevitably lead cultural participation towards a "creating and doing" dynamic as opposed to the prevailing one of simply "sitting back and watching or listening." According to the respondents in our survey, this phenomenon can be confirmed anecdotally in the field but does not appear to be so pronounced and widespread in every region of the country. At present, our statistical tools cannot evaluate the scope or longevity of this phenomenon.

Although research on cultural participation could provide indicators on the preferences and habits of young people, most research in this field does not cover at all or only touches on the youth audience except for

teenagers. The research in Canada that deals with young people under 15 does not cover the performing arts.

Many practitioners who work in the sector's organizations do not seem to be sufficiently detached to assess the systemic changes that are apparently now common in the cultural participation of young people. Several stakeholders describe local phenomena that affect them directly, but they are not generally in a position to situate these practices in a wider context, except in the case of a few examples naturally.

Some people perceive certain initiatives in the education system – greater involvement by young people in artistic creation – as a threat that could result in a withdrawal from professional art and therefore loss of a potential market. This worry is partly fuelled by the difficulty in determining whether this change reflects a social phenomenon of a growing and more participatory cultural literacy or is simply the result of financial scarcity due to budget cutbacks in the education sector.

A definite dependence on the school market

For everyone who creates, produces or presents artistic activities or works for children and youth, the school market is an essential element.

This report describes a number of points of contact between presenters, festivals or TYA companies and the education system. However, to complete the overall picture of the dynamics of the arts for young people sector in Canada, we need to pay more attention to what is practised and taught in schools. This would primarily involve compiling information on each province's curricula. Apart from information on the decision-making structure that brings schools and the arts together, this would certainly involve producing descriptions of programs and their objectives. However, that effort was far beyond the scope of our research.

Technological changes

Few indicators lead one to think that the overwhelming prevalence of new technologies and social media has caused significant harm to the TYA and children's festival sector. Of course, these new media have expanded the cultural supply but at the same time they have also enabled more isolated populations to access culture more easily. They have also enabled the entire population, which includes young people, to access tools for artistic creation, which is something that was not always available to them previously. As a result, these young people who have dabbled in creation or at least some more interactive form of culture might very well have new expectations of their experience of live performing arts. This change particularly concerns older age groups of young people. The challenges faced by creators of theatre for teenagers seem to confirm this observation. Young people are now more demanding and want to access works that they find more experiential.

At the same time, artistic creators and producers have also taken advantage of technology to access their audiences more directly. For instance, they have disseminated video clips and educational kits over the Internet prior to their shows and have created more popular areas of dialogue among the various people involved in a given production, all of which has served to prepare young people and their teachers.

Although using these technologies takes time, this factor has no impact on artistic programs that depend on the school market. This sector is a protected milieu in the sense that schedules are organized on the basis of the curriculum. At the level of families, technology might have more impact even though it is difficult to accurately measure this aspect in this study. Since the decision-makers in this context are the parents, it would be necessary to assess the impact of these technologies on the amount of time adults devote to recreational activities with their children to obtain adequate answers.

Consistent success factors

Even though numerous factors and circumstances can affect the success of organizations in the TYA and children's festival sector and their ability to reach their audiences, we have identified a few consistent ones:

- Significant collaboration and concerted action among the various cultural, educational, political and economic stakeholders belonging to the same community;
- Available support for the cultural supply through touring programs that circulate a variety of works in less well-served regions;
- Significant support for cultural access through financial assistance for school outing transportation or setting up cultural dissemination spaces in the vicinity;
- Consolidation or development of demand by initiating activities that stimulate appreciation of art by both children and teachers.

4.2 FUTURE PROSPECTS

Based on the documentation consulted, the nationally available data, the views compiled from our sample group of respondents, and our own analysis of the situation, we do not think that the audience for TYA and children's festivals has declined so much that the situation could truly be described as a crisis. All this triangulated information points towards an apparent plateauing of activity. However, the law of averages always masks the highest highs and lowest lows for certain organizations. Even maintaining the status quo can also mean that the sector's various players must devote more time, energy and imagination to this objective.

At the end of this attempt to paint a national picture of public participation in arts programming for children and youth, it would seem reckless to formulate a forecast for the overall sector on this basis alone – at least, on a national scale. As we have seen, many factors affect the

dynamics of the components studied. Some disparities are regional, while others occur at the sub-sector level.

Particular challenges have emerged with respect to the changes the sector's organizations and institutions are undergoing. Nonetheless, we believe that their key people can convert some of these challenges into opportunities.

Throughout this process, we have faced a lack of information or specific data on sometimes pertinent subjects. This knowledge shortfall is the first challenge that the sector must address to complete the description of public participation which has begun to emerge from this report.

To guide potential complementary research, we feel that the following four areas should be addressed and even prioritized:

- statistics
- demographics
- schools
- recreation time

Better statistics should produce a more accurate picture of cultural participation in certain activities. At present, reliable and usable information is limited to a small number of sources and only concerns some categories of organizations. Other raw data exist, mostly at the provincial level, but a considerable effort is required to process this information in a valid and harmonized way.

Demographics is an area that is not far removed from statistics but is more useful in facilitating an analytical grasp of the phenomena that have – or will have – a direct impact on the size and composition of potential audiences for current or future activities. A more refined understanding of regional particularities is necessary in order to predict trends that will affect both the school sector and the performing arts for young audiences sector.

The many references to schools in this report are due to the fact that there are so many close interconnections between the education system and arts programming for children and youth that the relationship could almost be described as one of dependence. Looking ahead, if we want to understand this key partner, it will be necessary to document this sector more fully and comprehend the specific characteristics of each region in terms of the importance placed on art in education systems. This is the prerequisite for consolidating, imagining or setting up the levers for better collaboration between these two sectors – as the vast majority of our survey participants have wanted for many years.

Recreation time is the blind spot in this report, primarily because we did not possess the data to evaluate its importance, nor have access to the respondents who could truly describe its contribution. All the same, cultural recreation embraces a major portion of people's cultural participation at the local level. The degree of interaction with professional organizations is difficult to gauge, but, as with other aspects of this study, it seems that this interaction varies according to the type of community concerned. The most obvious challenge in this area will be to address a sector that is even more decentralized than that of education.

In conclusion, we need to emphasize that the interest of the sector's key stakeholders in the completion of this research never waned throughout the process. The level of collaboration was not only exemplary, but leads us to believe that any complementary project in the future would be welcomed with the same enthusiasm. We believe that this is an opportunity that should definitely be seized.

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Alberta

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Saskatchewan

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Nova Scotia Department of Communities, Culture and Heritage,
<https://cch.novascotia.ca/department/research-reports>

Newfoundland and Labrador

Newfoundland and Labrador Arts Council,
<http://www.nlac.ca/links/index.htm>

Prince Edward Island

CulturePEI, <http://www.culturepei.ca/resources.html>

PEI Council of the Arts, <http://www.peiartscouncil.com/>

Other – Atlantic Canada

Atlantic Presenters Association, <http://www.atlanticpresenters.ca>

Contact East, <http://www.contacteast.ca>

RADARTS, <http://radarts.ca/cerf-volant>

Yukon

Yukon Department of Tourism and Culture,
http://www.tc.gov.yk.ca/about_arts_section.html

Other national organizations

ASSITEJ Canada, <http://www.assitej.ca>

Canada Council for the Arts, <http://conseildesarts.ca/conseil/recherche>

Canadian Arts Presenting Association (CAPACOA),
<http://www.capacoa.ca/fr/services/promotion-des-arts/statistiques>

Canadian Conference of the Arts, <http://ccarts.ca>

Canadian Parents for French (CPF), <http://cpf.ca>

APPENDIX 1 – LIST OF PEOPLE CONSULTED

ADVISORY COMMITTEE

- Joël Beddows, Directeur artistique, Théâtre français de Toronto
- Nadine Carew, General Manager, Green Thumb Theatre
- Allen MacInnis, Artistic Director, Young People's Theatre
- Catherine O'Grady, Artistic Director, Ottawa International Children's Festival
- Marc Pache, Directeur général, Théâtre bouches décousues
- Pierre Tremblay, Directeur général, Théâtres Unis Enfance Jeunesse (TUEJ)

GOVERNMENT STAKEHOLDERS

Canada Council for the Arts

- Sylvain Cornuau, Program Officer, Theatre Section
- Nancy Guertin, Program Officer, Theatre Section
- Jacinthe Soulliere, Research Officer, Research, Evaluation and Performance Measurement Section

Department of Canadian Heritage

- Karolina Wisniewska, Program, Policy & Project Leader, Canada Arts Presentation Fund, Arts Policy Branch
- Randy K. Miller, National Manager, Canada Arts Presentation Fund, Arts Policy Branch, Canadian Heritage
- Stephanie Simard, Policy Program Officer, Art Policy Branch

Institut de la statistique du Québec

- Claude Fortier, Chargé de projets, Direction des statistiques de la société du savoir et Observatoire de la culture et des communications du Québec

STAKEHOLDERS FROM THE MILIEU

- Fiona Andersen, Coordinator, Labrador Creative Arts Festival Inc.
- Marcia Babineau, Direction artistique et codirection générale, Coopérative de Théâtre l'Escaouette
- Esther Beauchemin, Directrice artistique et générale, Théâtre de la Vieille 17
- Hélène Blanchard, Codirection artistique et générale, Théâtre des Confettis
- Mario Borges, Directeur artistique et général, Bluff Productions Inc.
- Rémi Boucher, Directeur artistique et général, Les Coups de Théâtre
- Kevin Bruce, Agent, Kevin Bruce Arts Management
- Isabel Buttler, Board Secretary, Razzamataz Kids' Shows!
- Daune Campbell, General Manager, Axis Theatre Company
- Katherine Carol, Artistic Director, Vancouver International Children's Festival
- Stephen Colella, Associate Artistic Director, Young People's Theatre
- Élise Desveaux Graves, Direction des opérations et codirection générale, Coopérative de Théâtre l'Escaouette
- Louise Dionne, Directrice générale, par intérim, Les Gros becs

- Pablo Felices-Luna, Artistic Director, Manitoba Theatre for Young People
- Dean Fleming, Artistic Director, Geordie Productions Inc.
- Veronique Fontaine, Directrice générale, Carrousel, compagnie de théâtre
- Jane Gardiner, General Manager, Carousel Players
- Lise Gionet, Codirectrice artistique et directrice générale, Théâtre de Quartier
- Mélanie Goyette, Responsable du développement des publics, La Rencontre Théâtre Ados
- Alain Grégoire, Président-directeur général, La Maison Théâtre
- Sébastien Harrisson, Directeur artistique, Les Deux Monde
- Carole Higgins, Artistic Director, Carousel Theatre Company
- Lynda Hill, Artistic & Executive Director, Theatre Direct Canada / Wee Festival
- Patty Jarvis, Executive Director, Prologue to the Performing Arts
- Andrew Lamb, Artistic Director, Roseneath Theatre Company
- Louise Lapointe, Directrice générale et artistique, Festival de Casteliers
- Marie-Christine Lê-Huu, Directrice artistique, Théâtre de l'Avant-Pays
- Pierre Leclerc, Directeur général, Dynamo Théâtre
- Sylvie Lessard, Directrice générale, La Rencontre Théâtre Ados
- Jocelyne Losier, Diffusion, Théâtre de L'Oeil Inc.
- Joël Losier, Administration, Théâtre de L'Oeil Inc.
- Serge Marois, Directeur artistique, L'Arrière Scène, centre dramatique pour l'enfance et la jeunesse
- Patrick McDonald, Artistic Director, Green Thumb Theatre
- Chris McGregor, Artistic Director, Axis Theatre Company
- Manon Morin, Directrice générale, Réseau Scène
- Caitlin North, Professional Programming Presenter, Northern Alberta International Children's Festival (St-Albert)
- Christine Offer, Festival Programmer, Calgary International Children's Festival
- Rehka Pavanantharajah, Program Manager, Art Starts in Schools
- Jacinthe Potvin, Direction artistique et générale, Mathieu, François et les autres
- Éric Potvin, Diffusion et communications, Théâtre Le Clou
- Nathan Pronyshin, Y Stage Producer, Vertigo Theatre
- Neal Rempel, Executive Producer, Winnipeg International Children's Festival
- Katherine Sanders, Associate Producer, Young People's Theatre
- Nicole Thibault, Directrice générale, Canadian Parents for French
- Claire Voisard, Codirectrice artistique, L'Illusion Théâtre de marionnettes

APPENDIX 2 – SURVEY OF THE THEATRE FOR YOUNG AUDIENCES (TYA) SECTOR

Through semi-structured interviews with sector players.

Invitation and background

Daigle/Saire has been mandated by the Canada Council for the Arts to conduct a survey of children's and youth theatre audiences in Canada. This survey will focus on trends both in the sector and in society at large that would explain variations in show attendance as well as developments in how young people are engaging with arts and culture in general and theatre in particular.

These aspects will naturally be examined in light of the particular characteristics of the country's various regions, the two main languages of practice, and the different audience age groups.

For this survey, we are interviewing the sector's various players and are requesting an interview with you to enrich our understanding of the milieu through your experience and knowledge.

Please be assured that your specific responses will remain unattributed. However, a list of respondents will be included in the final report.

A. QUESTIONS FOR STAKEHOLDERS MORE INVOLVED IN DISSEMINATION ACTIVITIES

1. How long have you been working in children's and youth theatre? What are your main activities?
2. In general, have you noticed any new trends in young audiences – any developments in tastes and habits in how children and youth are engaging with artistic activities specifically for them?
3. Have you noticed any developments in behaviour and attitudes that would affect programming decisions? Could you identify any success factors relating to these choices?
4. Is young-audience loyalty towards theatre possible? What are the main challenges in this regard?
5. What are the most significant challenges in presenting young-audience shows on tour?
6. Have you observed any gaps in touring or presentation infrastructure that impede the dissemination of young-audience works?
7. What is your current relationship with the education system? What are the main challenges in the education sector?
8. In the region where you primarily operate, how are the roles and responsibilities of the various stakeholders or intermediaries structured?
9. Are there other factors that affect the milieu? Are you aware of other important aspects that we have not covered during our interview?

Lastly, do you have access to any reports or statistical information that would enhance our understanding of the theatre for young audiences sector and, if so, would you be willing to share them?

B. QUESTIONS FOR STAKEHOLDERS MORE INVOLVED IN CREATION/PRODUCTION ACTIVITIES

1. How long have you been working in children's and youth theatre? What are your main activities?
2. In general, have you noticed any new trends in young audiences – any developments in tastes and habits in how children and youth are engaging with artistic activities specifically for them?
3. Have you noticed any developments in behaviour and attitudes that would affect creation/production decisions? Could you identify any success factors relating to these choices?
4. Is young-audience loyalty for theatre possible? What are the main challenges in this respect?
5. What are the most significant challenges in presenting young-audience shows on tour?
6. Have you observed any gaps in touring or presentation infrastructure that impede the dissemination of young-audience works?
7. What is the current state of theatre programming in the education system? What are the main challenges in the education system?
8. In the region where you primarily operate, how are the roles and responsibilities of the various stakeholders or intermediaries structured?
9. Are there other factors that affect the milieu? Are you aware of other important aspects that we have not covered during our interview?

Lastly, do you have access to any reports or statistical information that would enhance our understanding of the theatre for young audiences sector and, if so, would you be willing to share them?