Canada Council for the Arts

The Arts in a Digital World

Thematic Report

1. Introduction and About Respondents

Survey Data Report

February 2017

Prepared by

Nordicity

Prepared for

Canada Council for the Arts

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Thematic Report

1. Introduction and About Respondents

Prepared by Nordicity

1. Introduction

1.1 Background

The Canada Council for the Arts' (Canada Council) has undertaken an initiative to understand how artists and arts organizations are adapting to creating, disseminating and making a living from the arts in a digital world.

As part of that ongoing investigation, the Canada Council engaged Nordicity to conduct a survey of artists and arts organizations in Canada.[1] The survey was intended to provide the Canada Council with a baseline understanding of the current state of digital adoption in the arts sector – and identify areas of potential growth. As such, the results of the current study could be seen as a benchmark against which future studies (of digital adoption in the arts sector) can be measured.

1.2 Methodology

The data presented in this report is principally derived from the results of an online survey administered to Canadian artists and arts organization between May and July of 2016 – with many survey questions referring to respondents' activity in the last year. As they interact with digital technologies in different ways, separate questionnaires were administered to arts organizations and artists. Potential respondents could access the survey questionnaire in two ways, either via a link sent to the email account registered with the Canada Council – or via an widely-shared URL. As such, while the focus of the study may have been the Canada Council's clients, the survey was also open to arts organizations and artists that had not previously received support from the Canada Council.

Overall, the survey gathered responses from **908 arts organizations and 2680 artists**. This response represents about 25% of all arts organization and 23% of all (known) artists in Canada. While it is not possible to estimate a margin of error for arts organizations (as they do not adhere to a normal distribution), Nordicity estimates that the sample of artists is accurate to within 2% (19 times of 20). Of course, as one analyzes smaller segments of the data (e.g., dance artists, or artists in Ontario), the margin of error widens. That said, all the data presented in this report was deemed by Nordicity to be sufficiently robust to be indicative of broader trends.

To ensure that the collected sample roughly adhered to the make up of the Canada Council's overall client base (which was used as a proxy for the wider arts sector), Nordicity established soft quotas for both arts organizations and artists. For arts organizations, Nordicity made sure that the artistic disciplines of organizations in the sample were representative; whereas for artists both artistic discipline and geographic distribution were tracked. In the end, the sample somewhat under-sampled arts organizations focussing on dance, music, and writing and publishing, while it under-sampled artists engaged in dance, inter-arts, and theatre – and those located in Atlantic Canada and the North.

At the same time as Nordicity set up soft quotas for key strata, it also tracked the representation of certain equity groups in the sample (for arts organizations and artists), namely: Aboriginals, Culturally Diverse Organization/Artists, Deaf & Disabled Organization/Artists, and Youth Artists. While most of

[1] The survey also included some arts organizations located outside of Canada that received support from the Canada Council (e.g., organizations that translate Canadian literature into local languages).

those groups were fairly well represented in the survey sample, they were not broken out for discrete analysis.

1.3 About this Report

The results of this research are divided into the following thematic reports:

- **Report 1**: introduces the research methodology and provides an overview of the respondents;
- **Report 2**: outlines respondents' overall use of technology;
- **Report 3**: details how digital tools are used at different stages of the creative process;
- **Report 4**: explores how respondents use data and perceive the return on investment of technology; and,
- **Report 5**: summarizes barriers to adoption and key observations.

Throughout the reports, data is presented with a number of top-line data filters, which are described below:

For arts organizations:	For artists:
▪ Respondents self-identified level of overall comfort with digital technologies as either "high comfort" and "low comfort;"	▪ Respondents self-identified level of overall comfort with digital technologies as either "high comfort" and "low comfort;"
▪ Size of organization is defined in terms of annual operating budget such that organizations with an annual operating budget of more than $250,000 are considered "large," and the remainder are considered "small;"	▪ Career stage categorizes artists practicing for fewer than ten years as "early career" and all others "late career;"
▪ Artistic discipline (where possible).	▪ Artistic discipline (where possible).

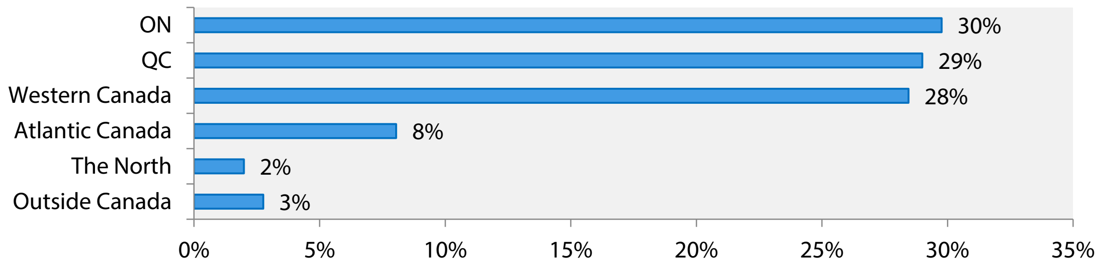
2. About the Respondents

The following section introduces the arts organizations and artists who responded to the survey. Details of their location, discipline, type and other basic demographic information are presented. In general, about a third of both groups responded to the survey in French and a majority are located in either Ontario or Quebec. Among organizations, theatre, visual arts and literature are the prevalent disciplines while visual arts, literature and music/sound are most common for artists.

2.1 Arts Organizations

The chart below gives the geographical distribution of arts organizations who responded to the survey. Ontario, Quebec and Western Canada accounted for 87% of respondents, between them.

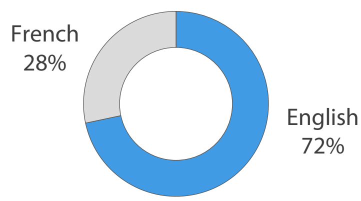
Figure 1: Location (arts organizations)



n=907
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows the distribution of arts organizations by language. The percentage of French-language respondents is similar to the overall response rate from Quebec, but it is not a perfect correlation, as some respondents from Quebec answered the survey in English, and there are significant French-language communities elsewhere in Canada.

Figure 2: Language (arts organizations)

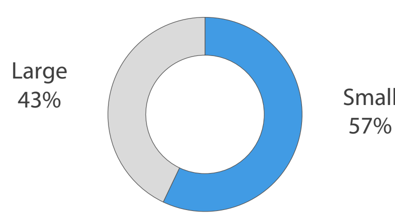


n=907
source: Nordicity Arts in a Digital World survey (2016)

The following chart divides arts organizations by discipline. Taken together, theatre, visual arts and literature account for more than half of respondents. Due to the low sample sizes, digital, circus, and deaf and disability arts have been excluded from subsequent analyses that are broken out by discipline.

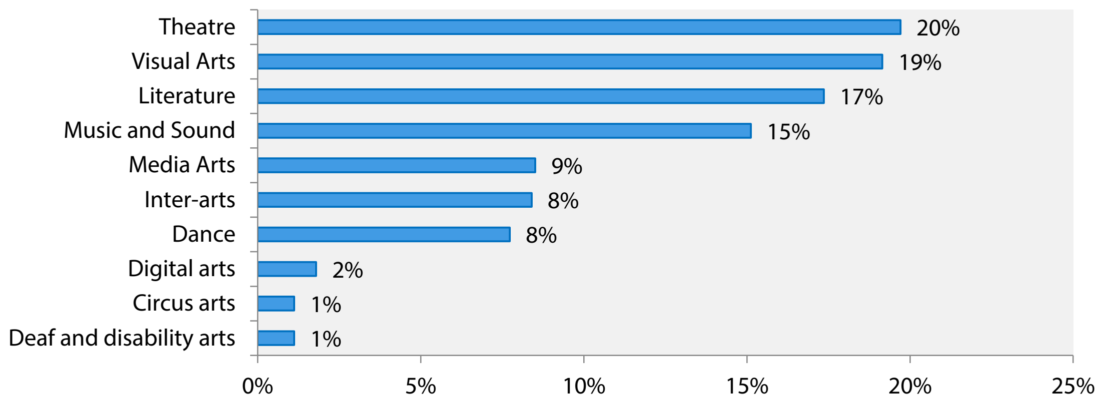
The chart below shows the distribution of arts organizations according to size. For the purposes of this report, small organizations are those with total operating budgets less than $250,000, and large one are those whose budgets are larger than $250,000.

Figure 3: Organization size (arts organizations)



n=883
source: Nordicity Arts in a Digital World survey (2016)

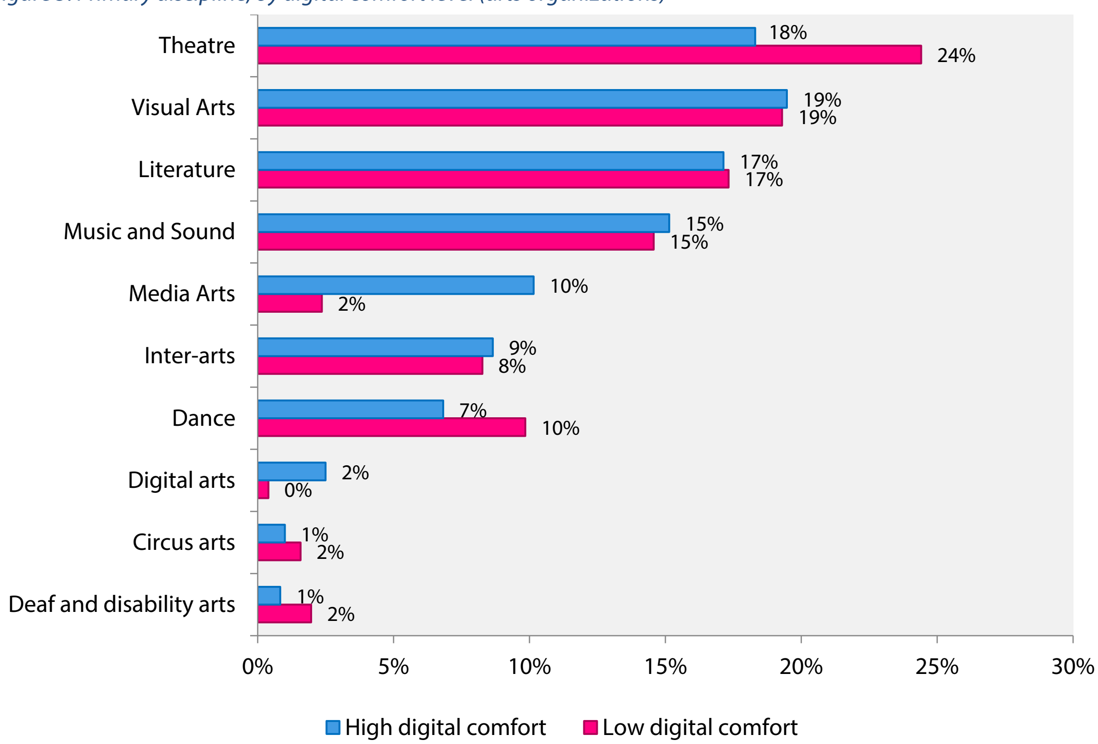
Figure 4: Primary discipline (arts organizations)



n=893
source: Nordicity Arts in a Digital World survey (2016)

This chart breaks down survey respondents by level of digital comfort as well as discipline. Respondents working in theatre and dance were more likely to have a low level of digital comfort. Conversely, media and digital arts organizations were generally much more comfortable with digital technology.

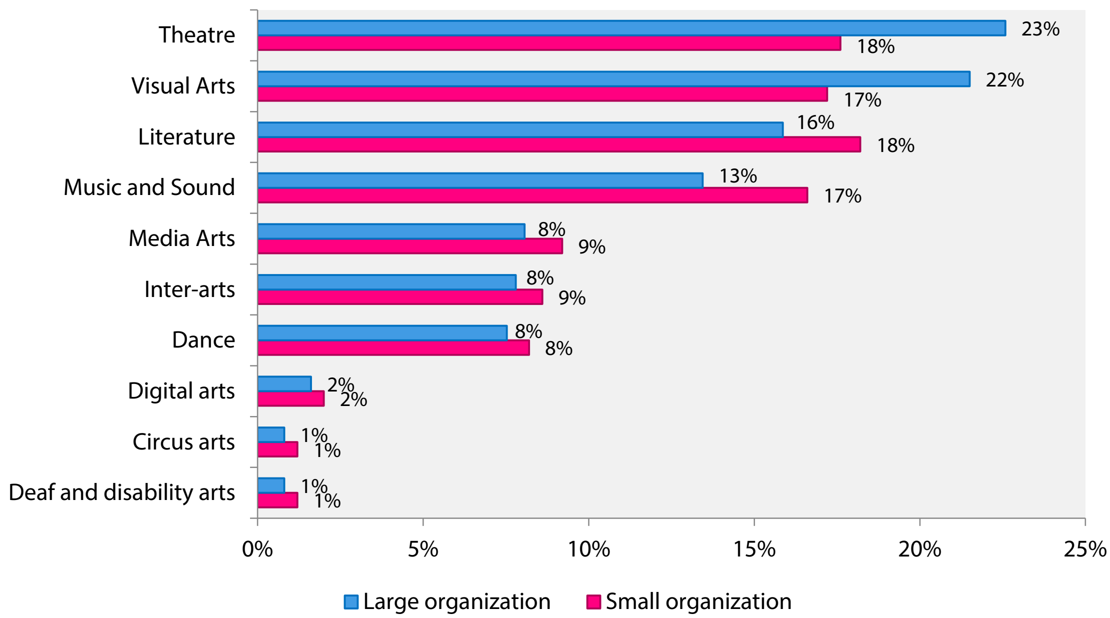
Figure 5: Primary discipline, by digital comfort level (arts organizations)



n=855
source: Nordicity Arts in a Digital World survey (2016)

The following chart illustrates organization size by level of digital comfort. For the purposes of this study, large organizations are defined as those whose annual operating budget is greater than $250,000. Theatre and visual arts respondents were more likely to fall into this category. In contrast, slightly more of the literature and music and sound organizations are classified as small.

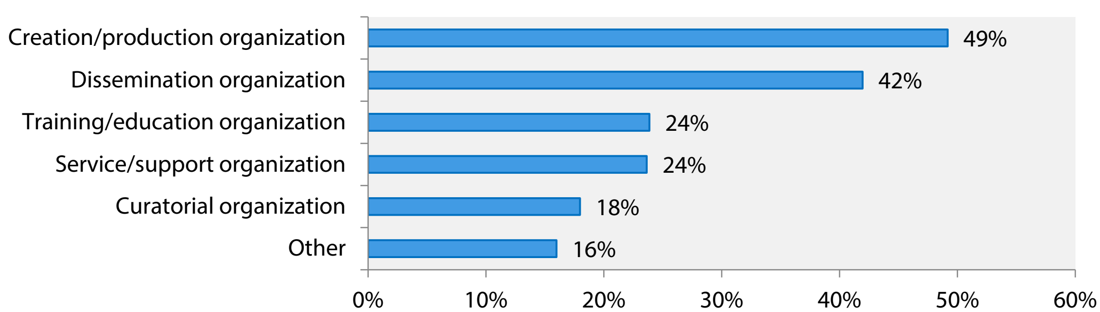
Figure 6: Discipline, by organization size (arts organizations)



n=872
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows the organizations that responded to the survey according to their primary activities. The responses do not sum to 100% because respondents were invited to select more than one option. Nonetheless, creation/production and dissemination are both almost twice as common as training/education and service/support, the next most prevalent categories.

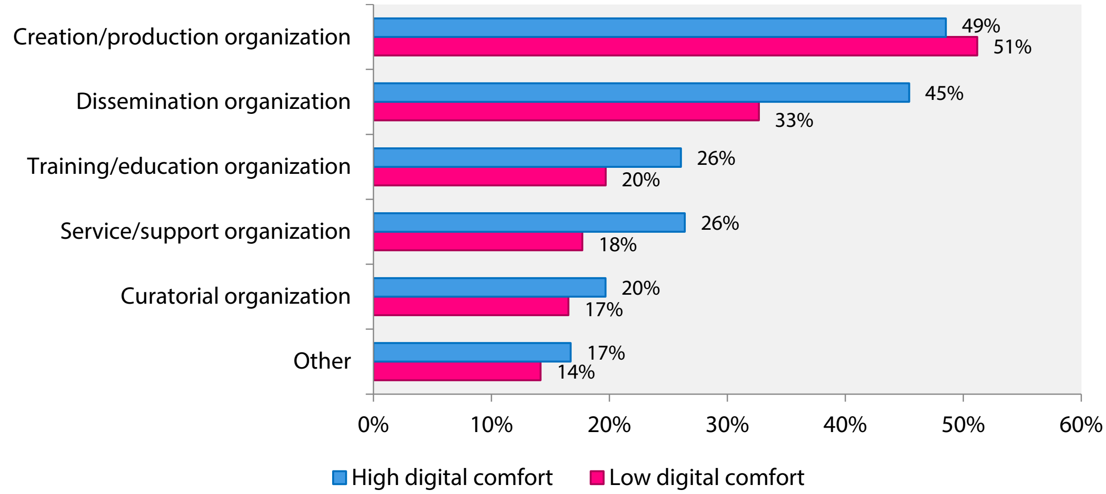
Figure 7: Organization type (arts organizations)



n=901
source: Nordicity Arts in a Digital World survey (2016)

The chart below breaks down organizations' activities by level of digital comfort.

Figure 8: Organization type, by digital comfort (arts organizations)

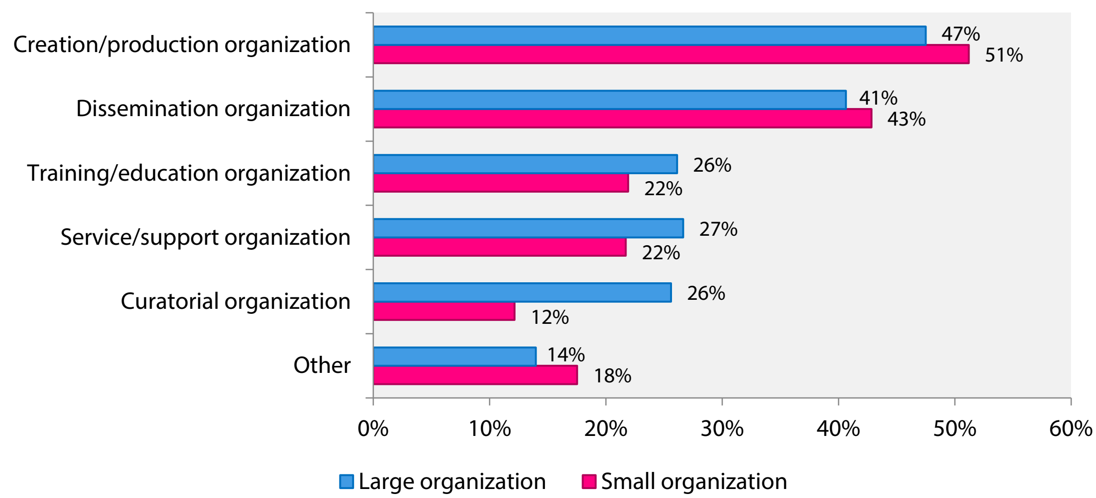


n=864
source: Nordicity Arts in a Digital World survey (2016)

As seen above, the greatest discrepancy in level of digital comfort. Organizations devoted to dissemination are more likely to be digitally comfortable since these activities are increasingly reliant on online platforms. The fact that service/support and training/education organizations were also more likely to be digitally comfortable suggests that they are well-positioned to support peers who may be struggling with digital tools.

The following chart illustrates primary activity by organization size.

Figure 9: Organization type, by organization size (arts organizations)

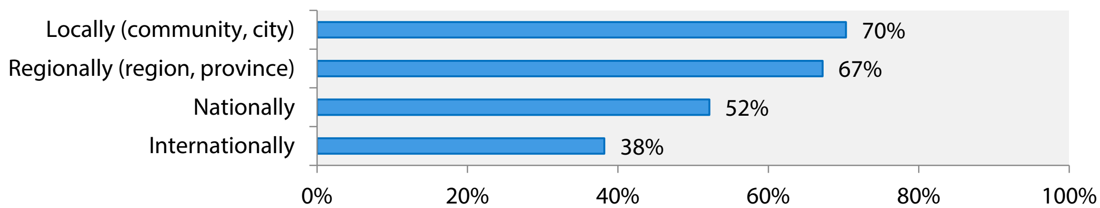


n=881
source: Nordicity Arts in a Digital World survey (2016)

As can be seen, the greatest discrepancy is in the focus on creation, an area in which large organizations are more than twice as likely to be involved than small. In addition, it is intuitive that large organizations, or those that have a larger operating budget, are more likely to provide training/education and service/support.

The chart below summarizes the geographical scope of organizations' activities.

Figure 10: Organization reach (arts organizations)

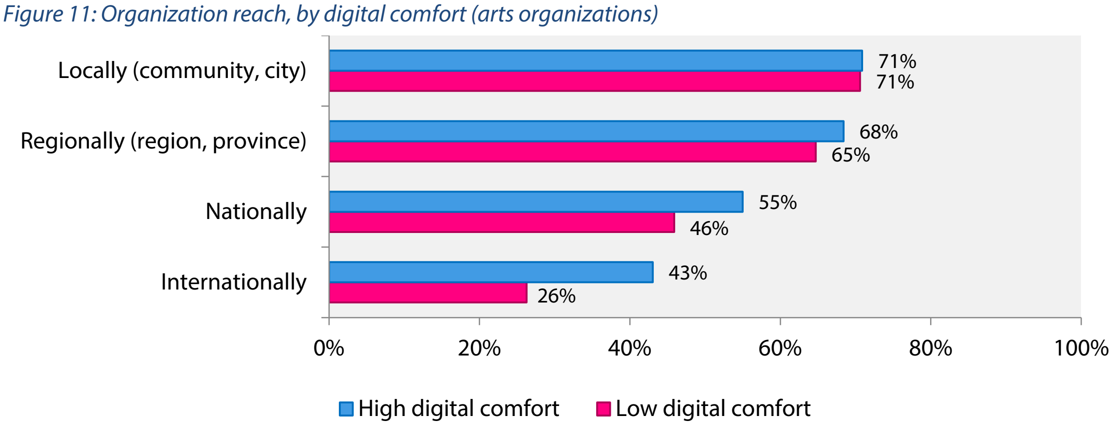


n=903
source: Nordicity Arts in a Digital World survey (2016)

As indicated above, the vast majority of organizations work locally and regionally, while slightly more than half (52%) are also active nationally.

The chart below breaks down geographical scope of activities by organizations' level of digital comfort.

Figure 11: Organization reach, by digital comfort (arts organizations)

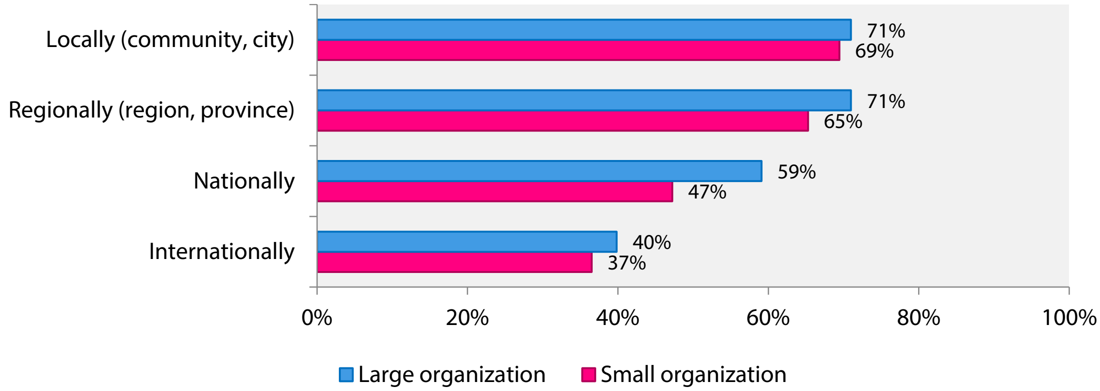


n=866
source: Nordicity Arts in a Digital World survey (2016)

Level of digital comfort has the highest impact on an organization's ability to work internationally. In contrast, digital comfort has no impact on local activities.

The following chart analyses the reach of organizations' activities by their size. Organizational size has the greatest impact on activities at the national level. Because a smaller gap is observed between large and small organizations internationally, digital technology may actually enable small organizations to compete outside of Canada, particularly in various linguistic markets.

Figure 12: Organization reach, by organization size (arts organizations)



n=883
source: Nordicity Arts in a Digital World survey (2016)

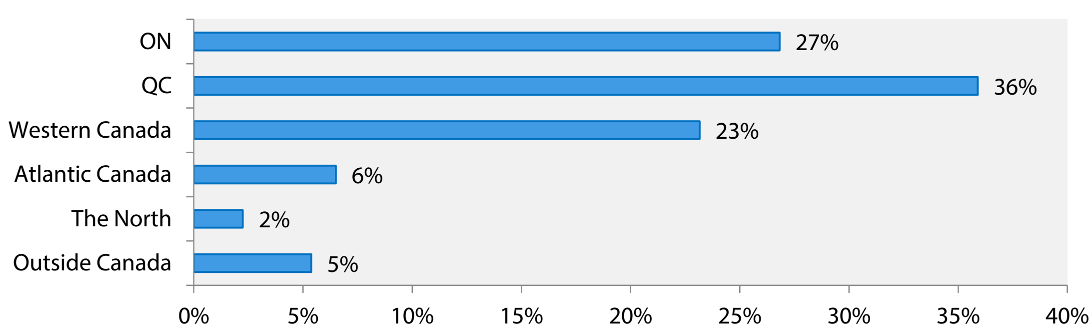
The following table contains the total number of arts organizations that responded to the survey who are also listed as having received at least one grant from the Canada Council. The survey data was linked back to the Council's database of grant recipients directly, providing a more accurate picture of grant status than the self-reported data in the survey.

	Organizations	% of total sample (907)
OLM (English and French)	45	5%
Deaf and Disability arts	19	2%
Aboriginal	80	9%
Culturally diverse	110	12%

2.2 Artists

The following chart shows that the majority of artists are in Quebec and Ontario (63%), with strong representation in Western Canada (23%).

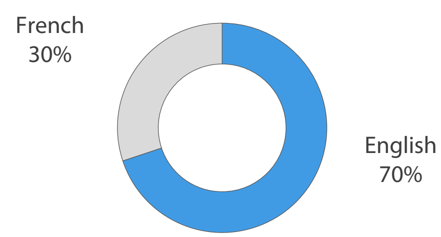
Figure 13: Location (artists)



n=2,677
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that the majority of respondents (70%) speak English and 30% speak French.

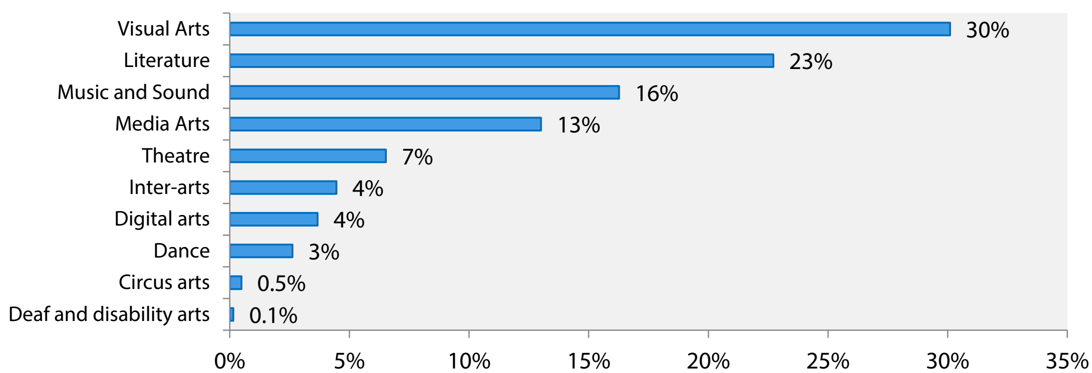
Figure 14: Language (artists)



n=2,680
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows that most artists work in the visual arts and literature disciplines.

Figure 15: Primary discipline (artists)

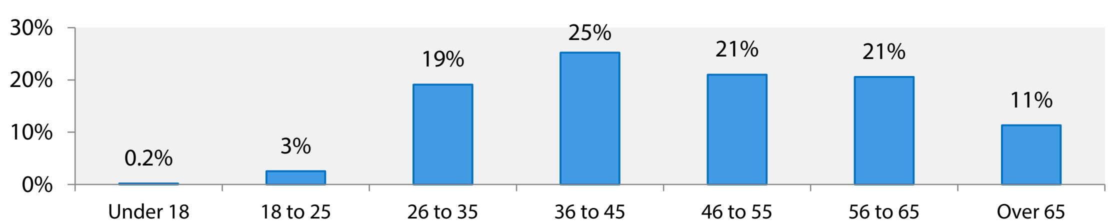


n=2,668
source: Nordicity Arts in a Digital World survey (2016)

As the figure above illustrates, there were relatively few circus artists (0.5%, or 13 artists), and deaf and disability arts practitioners (0.1%, or 4 artists) represented in the sample. Due to their small sample sizes, these two disciplines have been excluded from any subsequent analyses that break out artists by primary discipline.

The following chart shows the distribution of respondents by age. This result shows that most artists are of working age, and are evenly distributed, tapering off in the youngest and oldest brackets identified.

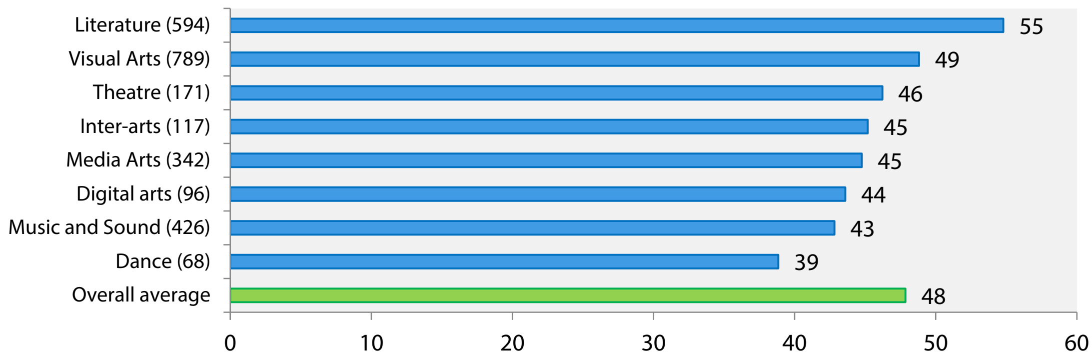
Figure 16: Age (artists)



n=2,631
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that on average, literature and visual artists feature the oldest practitioners, whereas digital arts, music and sound, and dance artists tend to be the youngest.

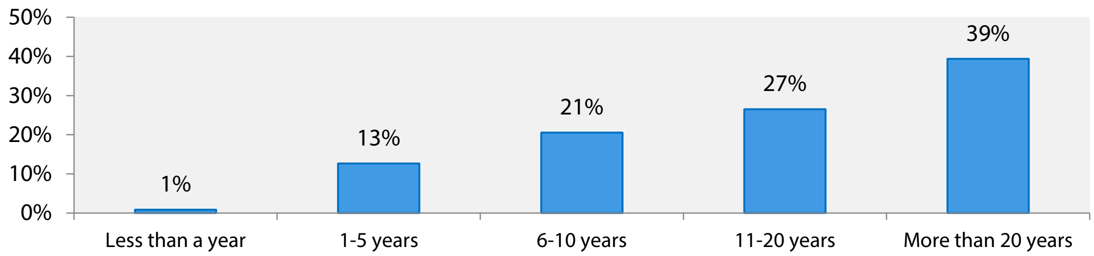
Figure 17: Average age, by discipline (artists)



n=2,631
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows that about two thirds of artists have been practicing their craft professionally for over ten years. A significant amount of subsequent analysis in this report uses this ten-year cut-off point to distinguish the unique characteristics of early and late career stage artists.

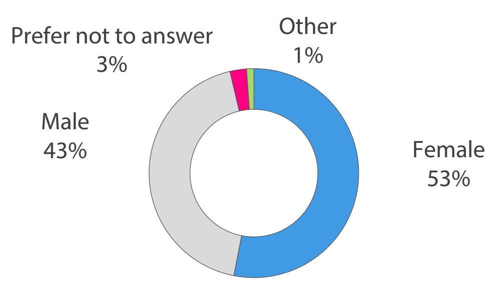
Figure 18: Career stage (artists)



n=2,631
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that a modest majority of artists identify as female.

Figure 19: Gender (artists)



n=2,664
source: Nordicity Arts in a Digital World survey (2016)

The following table contains the total number of artists that responded to the survey who are also listed as having received at least one grant from the Canada Council. The survey data was linked back to the Council's database of grant recipients directly, providing a more accurate picture of grant status than the self-reported data in the survey.

	Artists	% of total sample (2680)
Deaf and Disability arts	7	0.3%
Aboriginal	74	2.8%
Culturally diverse	136	5.1%
Youth artist	65	2.4%