Canada Council for the Arts | Conseil des arts du Canada

CONTEXT RESEARCH GROUP

CONTEXT IS EVERYTHING

ARTS COMMUNITY PULSE SURVEY

Prepared for: Canada Council for the Arts

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1 EXECUTIVE SUMMARY

Over the past two years, the arts sector has faced significant financial, operational, and workforce challenges. Individuals, groups, and organizations reported difficulties that have hindered their ability to adapt, sustain and grow their work. While public funding has been instrumental in addressing some of these challenges, the sector continues to struggle, highlighting the critical need for increased support to transform and adapt to ensure long-term sustainability.

Financial Health
The financial health of the arts sector has been deeply impacted by funding challenges, rising costs, and decreased revenues. Many respondents reported that their expenses have increased, while their total income or revenue has decreased. All respondents emphasized the critical need for more public funding to transform and adapt to be more sustainable. Key areas for support include diversifying revenue streams, expanding market and network opportunities, increasing public engagement, enhancing accessibility and donor development, and improving staff recruitment, retention, and engagement.

Artistic Practice (Individuals and Groups)
Individuals and groups in the arts sector have encountered significant barriers to maintaining the impact of their artistic work. In-person opportunities to share their art have diminished, and many respondents reported struggles with mental health and well-being. These challenges, coupled with financial hardships, have made it increasingly difficult for artists to continue their work.

Workforce (Organizations)
Organizations have faced varied staffing changes, with some reporting growth and others experiencing staff reductions. Publicly funded organizations were more likely to see an increase in staff, but overall, recruiting and retaining staff has been a major challenge. Furthermore, most organizations reported that they experienced mental health and well-being concerns within their staff, mirroring those of individuals and groups.

Programming and Public Engagement (Organizations)
Despite increased audience engagement, both in-person and online, many organizations have found it difficult to sustain the impact of their programming due to rising costs and reduced revenues. Without additional funding, this growth is unsustainable. Combined with workforce and financial challenges, many organizations are struggling to maintain their operations.

Impact of Public Funding
Public funding has played a crucial role in enabling the majority of individuals, groups, and organizations to expand their activities, experiment with new ideas, and reduce financial stress. Beyond direct benefits, this funding has positively impacted communities by raising visibility for the arts, contributing to community well-being, and supporting local economies. However, the sector needs continued and increased public funding to ensure its long-term sustainability and to continue making meaningful contributions to society.

Despite these challenges, individuals, groups, and organizations are eager to adapt and become more sustainable. Public funding is viewed as a key enabler of this transformation, providing the resources necessary for the sector to not only survive but thrive. With increased support, the arts sector can continue to enrich Canadian communities and make meaningful cultural and economic contributions.

2 INTRODUCTION

The Canada Council for the Arts retained the services of Context Research Group (CRG) to administer a national survey to better understand the challenges and needs of the arts sector in Canada.

The objectives of the survey were to provide timely information about the needs of the sector in a post-pandemic context and inform approaches to strengthen public support to the sector.

The survey gathered information on the needs and challenges of the sector in the post-pandemic context, including:

- Plans to continue operations/continue work in the arts.
- Extent of recovery from financial impacts of pandemic.
- Experiences with pandemic related workforce, burnout, or mental health challenges.
- Ways to improve sustainability, adaptability and resilience.

3 METHODOLOGY

An online Computer-Assisted Web Interview (CAWI) survey was conducted between June 20th, 2024 and July 19th, 2024, in both official languages. The survey was sent to 31,431 individuals, groups and organizations who have applied or received support from the Council's funding programs between 2021-2024. During the same period, the survey was also disseminated to other stakeholders by other funders at the national, provincial, and municipal levels, as well as other organizations.

There were 7,255 total respondents to the survey, consisting of 5,791 individuals and groups, and 1,464 organizations. Of these, 600 were "Core organizations", organizations who received operating funding from the Council. Individuals and groups were given the same survey, so their responses are grouped together to ensure consistency in reporting. The overall survey response rate was 27%, which was calculated as the percentage of completed surveys from the total number of opened emails.

The survey responses represented all provinces and territories of Canada – 7% (483) from Alberta, 17% (1,203) from British Columbia, 3% (203) from Manitoba, 2% (137) from New Brunswick, 1% (102) from Newfoundland and Labrador, 3% (243) from Nova Scotia, 28% (2,048) from Ontario, 1% (45) from Prince Edward Island, 33% (2,396) from Quebec, 1% (108) from Saskatchewan, <1% (12) from the Northwest Territories, <1% (4) from Nunavut and <1% (33) from Yukon. In addition, there were 3% (238) from countries outside of Canada.[1] Due to the small sample sizes in the territories, detailed analysis for these regions was not conducted. Furthermore, 74% (5,376) responded to the survey in English and 26% (1,879) responded in French.

The respondents of the survey also cover a wide range of disciplines and fields of practice. These include 23% (1,644) in Visual Arts, 19% (1,350) in Music and Sound, 18% (1,341) in Literature, 11% (792) in Media Arts, 11% (762) in Theatre, 6% (436) in Multidisciplinary Activities, 5% (360) in Dance, 2% (147) in Inter-Arts, 2% (144) in Indigenous Arts, 2% (114) in Digital Arts, 1% (97) in Deaf and Disability Arts and 1% (89) in Circus Arts.

[1] Canadian artists and authors residing outside Canada, as well as international publishers and co-producers who had applied for Canada Council funding were included among those invited to participate in the survey.

Survey respondents belong to a variety of Strategic Groups, reflecting the diversity within the arts sector. These include 33% (2,421) identifying as women, 22% (1,599) from racialized (culturally diverse) communities, 18% (1,273) as youth, 14% (1,004) from 2SLGBTQI+ communities, 12% (858) from Deaf and disability communities, 7% (523) from Anglophone official language minority communities, 6% (460) from gender-diverse communities, 5% (381) as First Nations, Inuit or Métis peoples, and 5% (373) from Francophone official language minority communities.

4 KEY TERMS

Individuals: Individual artists or arts workers.

Groups: Artistic groups or collectives comprised of two or more individuals.

Organizations: Arts organizations, including non-profit and for-profit organizations.

Council recipients: Respondents who have received funding from the Council. For organizations, they can be further classified into:

- **Core organizations** – organizations that received operating funding.
- **Non-Core organizations** – organizations that received project or composite funding.

Strategic Groups: Include youth, official language minority communities, Indigenous, Black, racialized, Deaf and disability, 2SLGBTQI+, gender-diverse communities, women, and people at intersections of these groups. Respondents can belong to one or more strategic groups.

Anglophone: Respondents who selected English as their preferred official language of communication.

Francophone: Respondents who selected French as their preferred official language of communication.

Atlantic Provinces: Respondents from New Brunswick, Newfoundland and Labrador, Nova Scotia, and Prince Edward Island.

Prairie Provinces: Respondents from Alberta, Manitoba, and Saskatchewan.

5 REPORT CONSIDERATIONS

5.1 Net Scores

Some charts include Net scores for questions with diverging scales (5- or 7-point scales where responses range from negative to positive). These scores represent the sum of positive or negative responses. For example, in the image below, Net Unstable combines the Very stable and Somewhat unstable options, while Net Stable combines the Somewhat stable and Very stable options.

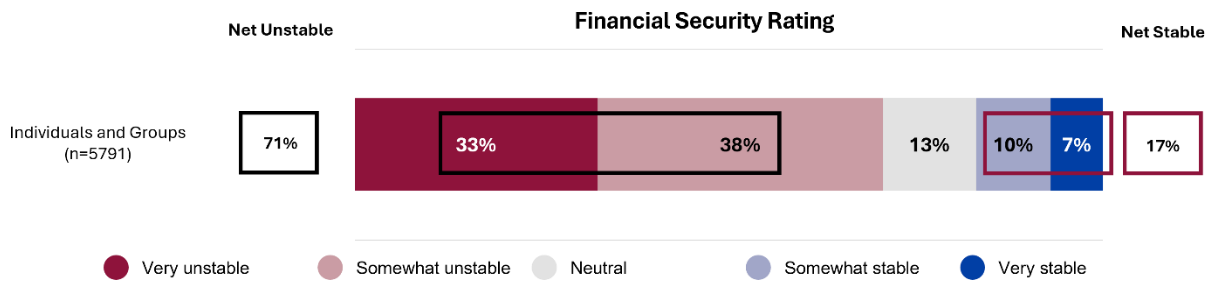

Figure 1: Net Unstable and Net Stable

5.2 Significance Testing

Statistically significant differences (at the 95% confidence level) are stated throughout the report where possible. Proportions are compared using two-tailed non-parametric tests, and averages are compared using two-tailed t-tests.

5.3 Rounding

Due to rounding, the numbers may not add up to the totals. For example, the sum of all values may add up to 99% or 101%.

5.4 Additional Data Tables

Supplementary data tables that provide additional details related to the findings and profile data tables can be found in Appendix B.

6 DETAILED FINDINGS

6.1 Financial Health

Over the past two years, the financial health of respondents in the arts sector has faced significant challenges. Concerns about funding challenges, escalating costs, and declining revenues have created a climate of instability. Many reported a notable increase in expenses, underscoring the urgent need for additional public funding to bolster the sector's sustainability. Key areas identified as requiring increased support include diversifying revenue streams, market and network development, and enhancing public/audience engagement.

6.1.1 Financial Security

The majority of respondents indicated that their financial security has been unstable in the past two years.

Seven in ten (71%) individuals and groups rated their financial security as unstable in the past two years, while organizations also rated their financial security as unstable with around 1 in 2 (51%) reporting it as such.

The findings show that funding plays a key role in the financial health of the arts sector. Non-recipient individuals and groups were significantly more likely to report unstable financial security (74%) compared to recipient individuals and groups (68%).

Among recipient organizations, non-core organizations were significantly more likely to report their financial security as unstable (56%) compared to core organizations (44%). Recipient organizations were also significantly more likely to report stable financial security (39%) compared to non-recipient organizations (29%).

This suggests that both the presence of funding and the type of funding received from the Council have an impact on financial outcomes in these organizations.

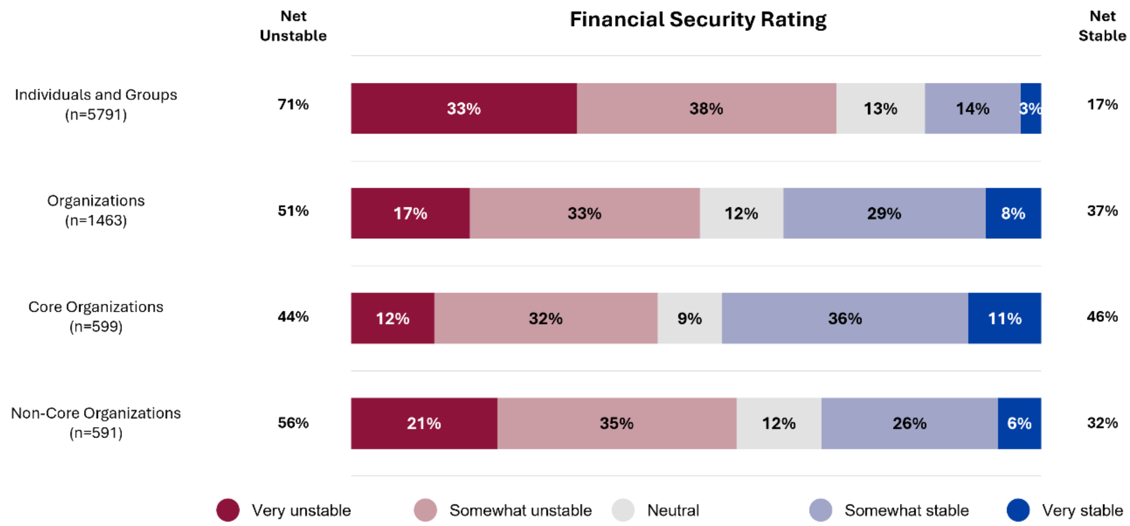

Figure 2: Financial Security Rating of Individuals, Groups and Organizations

Among individuals and groups, those in certain fields of practice showed notable differences in financial stability. Media Arts (77%) and Dance (79%) appear to be more vulnerable disciplines, as individuals in those fields were significantly more likely to report unstable financial security compared to other fields. In contrast, for organizations, there were no significant differences in financial security across fields of practice.

For organizations, there were some variations in ratings of financial instability: Atlantic provinces (47%), British Columbia (44%), Ontario (52%), and Prairie provinces (47%). However, organizations in Quebec were significantly more likely to report unstable financial security, with 59% indicating instability compared to other regions. This aligns with the finding that Francophone organizations were significantly more likely to report unstable financial security (57%) than Anglophone organizations (47%), as the majority of French organizations who responded to the survey were located in Quebec (89%). This illustrates that the perceived financial stability of organizations varies across regions.

Additional differences emerged between organizations based on operating budget size. Smaller organizations with an operating budget under $75,000 tend to face unstable financial security compared to larger organizations. Despite this difference, financial instability was apparent across all organization sizes, highlighting the widespread financial difficulties across the arts sector.

6.1.2 Financial Challenges or Gaps

Financial instability, funding challenges, and rising costs were the three primary financial concerns that respondents anticipate in the next two years.

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Respondents stated that their financial instability is driven by declining revenues, including reduced access to public funding, and rising costs. For many, the financial landscape is becoming increasingly difficult to navigate:

> *"We expect a much different financial scenario in the coming 2 years. The costs of providing stable employment have gone up, as have costs to deliver programs. This comes alongside significant scaling back of corporate sponsorships (already experienced this year), and stagnant or decreasing government funding. We will be challenged to continue to deliver the same level of programming in this environment."* – Non-core organization

Individuals and groups who reported financial instability as a concern were more likely to be working in Literature or belong to one or more strategic groups. In addition, larger organizations with a budget of $1,000,000 or more were most likely to raise this concern possibly due to their more complex operations.

Increased competition for grants, uncertainty in funding sources, and funding limitations were also frequently cited as funding challenges:

> *"We have found funding more difficult to obtain locally, provincially and federally since the pandemic. We have a loyal audience who have largely stayed with us even with the 2 years of our doors being closed, but our funding partners have not. Unfortunately, even with a strong audience base, that does not provide enough revenue to afford to pay professional artists their due. We have had to reduce our shows significantly, despite local interest and demand."* – Group recipient

Funding challenges were more of a particular concern for individuals and groups that work in the performing arts, as well as for not-for-profit organizations, suggesting that these groups are more likely to struggle with securing sufficient funding to sustain their operations. Additionally, not-for-profit organizations often rely on external funding sources, which are becoming more competitive, leaving these organizations more vulnerable to financial instability.

Furthermore, the overall increase in the cost of living is another financial challenge that the respondents are experiencing. These rising costs were most frequently reported by individuals and groups from Ontario and work in Visual Arts and Music and Sound. Rising operational and material costs tend to affect artists who rely on physical materials or venues, such as visual artists and musicians. Similarly, rising costs tend to be reported by organizations who have a larger operating budget of $1,000,000 or more, or by festivals or presenters whose rising costs could be tied to production, staffing and logistics.

> *"We are struggling to get ticket sales up to pre-Covid numbers. With the increase in site service costs, we have had to reduce the number of performers that we can present and balance with providing an affordable audience experience. Increased cost of gas and accommodations for travel have affected out of region guests."* – Non-core organization (Festival/Presenter)

These top three challenges were consistent among individuals, groups, and organizations, indicating a shared experience of financial pressure across the arts sector.

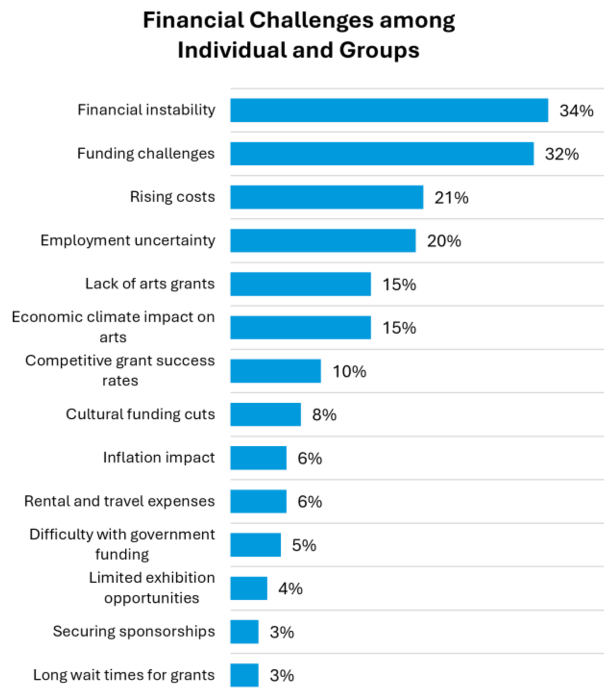

Figure 3: Financial Challenges or Gaps Anticipated by Individuals, Groups and Organizations

6.1.3 Change in Income or Revenue

When respondents were asked if they experienced any changes in their total income or revenues in the past year, the majority reported that it had decreased.

Among individuals and groups, around three in five (64%) said that their total income has decreased, while only one in five (19%) said it has increased.

Additionally, those working in Media Arts (70%) were more likely to be impacted by income decreases compared to other fields of practice, further highlighting the vulnerability of this group to financial instability.

Most organizations, including those receiving core funding from the Council, also experienced a decrease in their total revenues with half (54%) saying so.

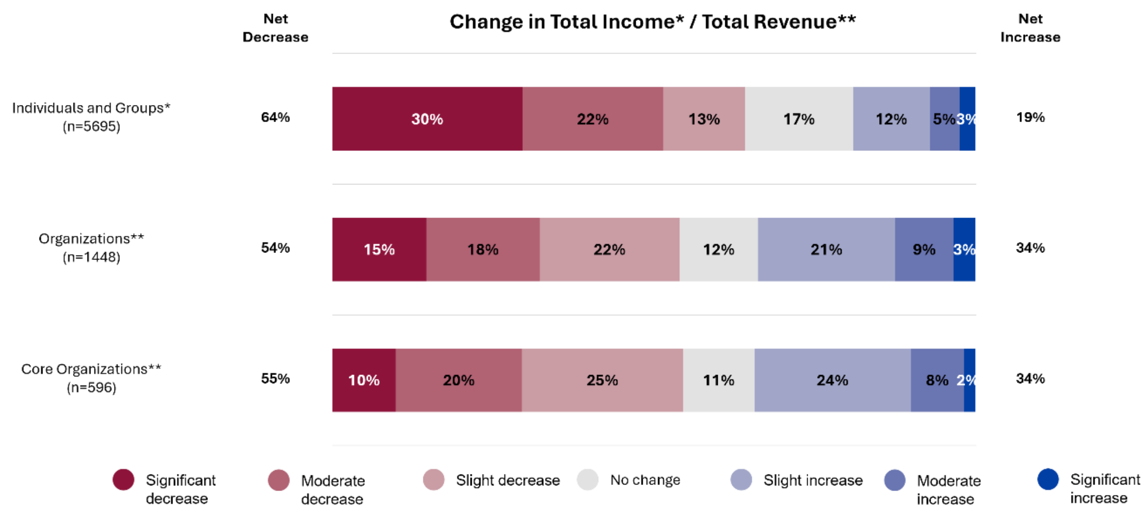

Figure 4: Change in Total Income / Total Revenue

When asked about the different sources of revenue, organizations were more likely to say that the amount of public funding they received (56%) and their earned revenues (43%) have decreased in the past year. However, the amount of private funding they received in the past year tends to have remained unchanged (39%) or decreased (39%).

While the majority of core organizations (54%) and non-core organizations (57%) reported decreases in funding, core-funded organizations were more likely to report no change in public funding (27%) compared to non-core organizations (15%).

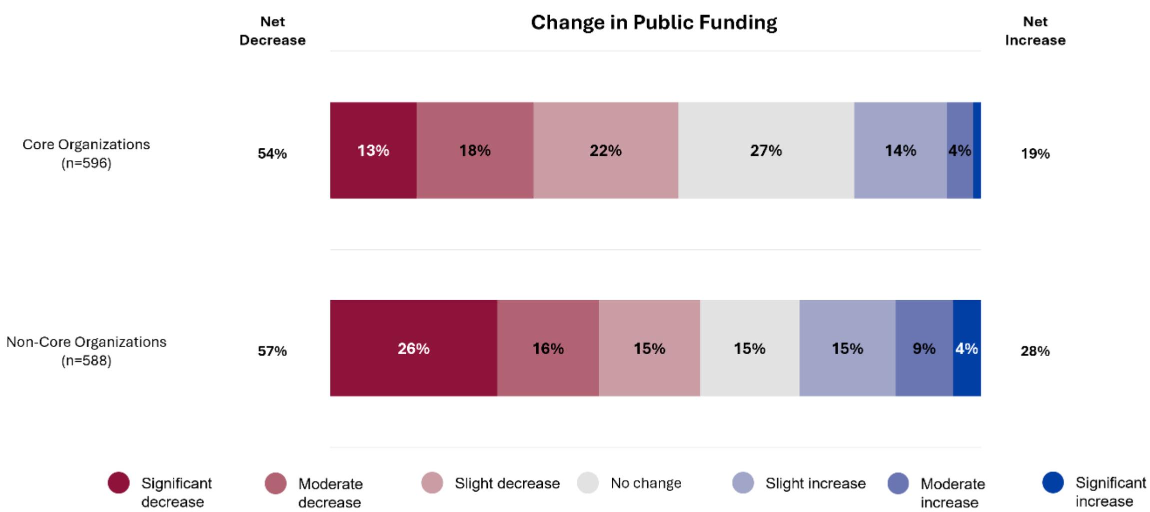

Figure 5: Change in Public Funding for Organizations

Anglophone organizations were significantly more likely to experience a decrease in private funding (42%) than Francophone organizations (32%). This disparity suggests potential regional or cultural differences in access to private donors. Moreover, organizations that are primarily a festival or a presenter were significantly more likely to experience a decrease in private funding (46%) compared to their counterparts (35%). Finally, smaller organizations with budgets under $75,000 were significantly less likely to experience an increase in private funding (13%) than larger organizations, particularly those with a budget of $1,000,000 or more (34%).

6.1.4 Change in Expenses

Despite respondents reporting a decrease in income and revenue in the past year, the majority of them reported that their total expenses have increased, with seven in ten (72%) individuals and groups and nine in ten (86%) organizations indicating this.

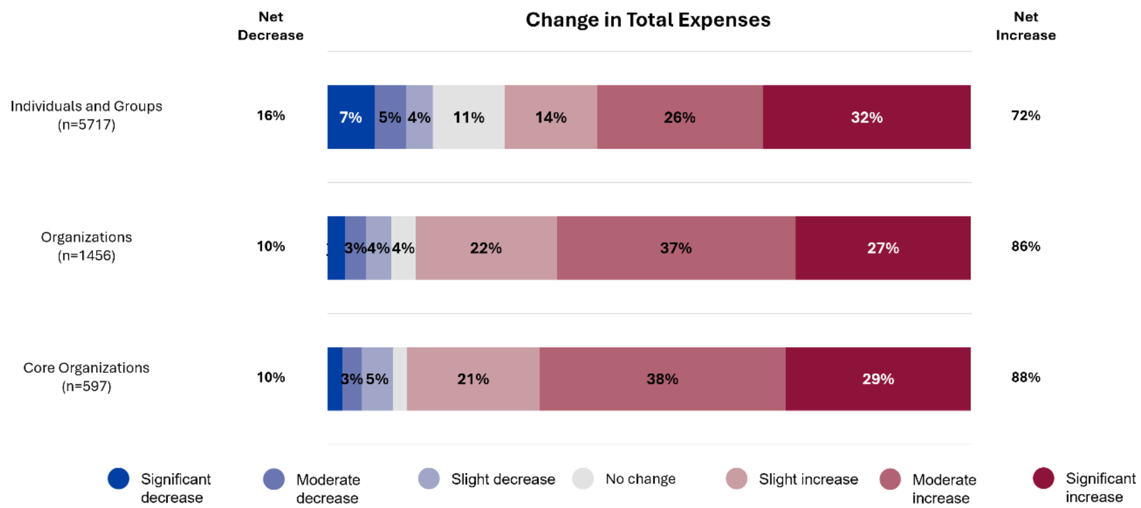

Figure 6: Change in Total Expenses

Recipient individuals and groups were significantly more likely to experience an increase in total expenses (75%) compared to non-recipient individuals and groups (69%). This suggests that while Council funding may help offset some costs, it may not be sufficient to cover the rising operational and project expenses that these groups face, highlighting their need for more financial support.

Specifically, most organizations reported that their administration expenses (79%), artistic expenses (76%), marketing and communications expenses (72%) and facility operating expenses (71%) have increased in the past year. However, fundraising expenses were more likely to have remained unchanged (51%) than increased (42%).

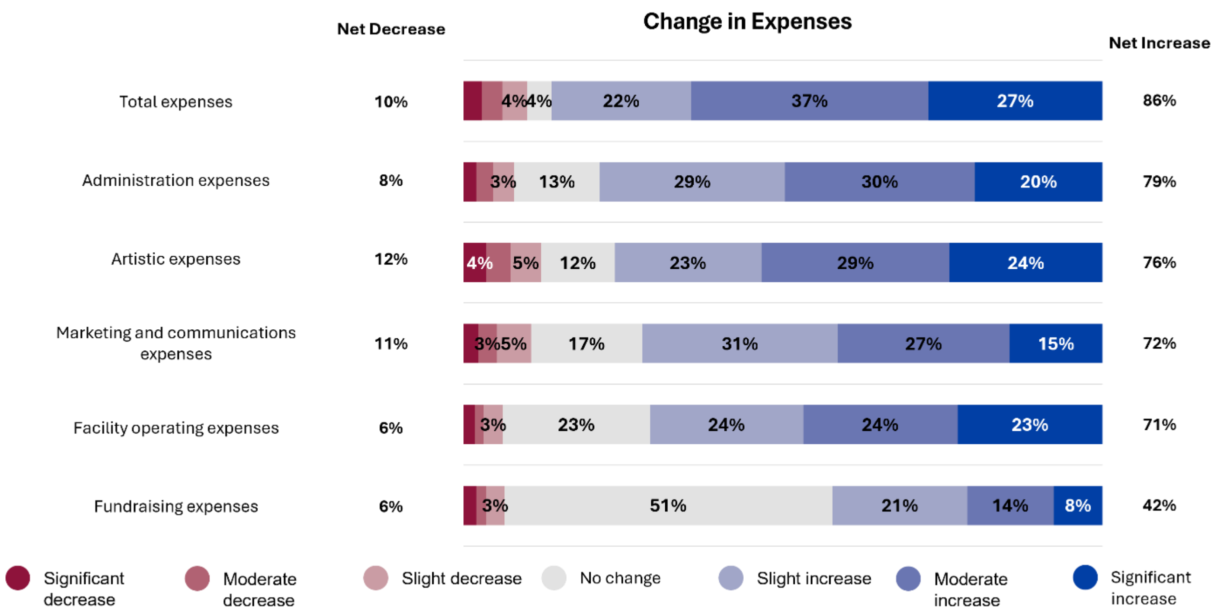

Figure 7: Change in Expenses for Organizations

Facility operating expenses were particularly notable, with core organizations significantly more likely to report an increase (78%) compared to non-core organizations (67%). Organizations that operate a facility or venue were even more likely to report rising facility operating costs (85%) compared to those without such responsibilities (63%). Festivals or presenters also reported a greater likelihood of increased facility operating expenses (77%) than their counterparts (68%). Furthermore, organizations with larger operating budgets—between $500,000 and $999,999 (80%) and those above $1,000,000 (85%)—were more likely to see rising facility operating costs compared to smaller organizations. The rise in facility operating expenses, particularly among festivals and presenters and those with larger operating budgets, suggests that the cost of maintaining physical spaces is becoming more burdensome, which could affect how they allocate other resources for artistic programming and outreach initiatives.

Administrative expenses also saw notable increases, particularly among core organizations (83%). Similarly, organizations with a facility or venue were more likely to report an increase in administrative costs (85%) compared to those without (75%). Larger organizations, especially those with a budget of $1,000,000 and above, were significantly more likely to experience an increase in administrative expenses (87%) compared to smaller-budget organizations, particularly those with a budget under $75,000 (64%). The increase in administrative expenses, particularly among core organizations and those with larger operating budgets, raises concerns that they may divert resources away from essential artistic programming and community engagement activities.

Across all expense categories, organizations that operate a facility or venue were consistently more likely to report rising costs than their counterparts. Additionally, the trend indicated that as operating budgets increase, so do expenses across various categories.

6.1.5 Criticality of Additional Public Funding

Unanimously, individuals and groups (99%) and organizations (100%) agreed that additional public funding is critical for the arts sector and their organization to transform and adapt to be more sustainable. Specifically, around nine in ten individuals and groups (94%) and organizations (93%) said that it was very or extremely critical. The overwhelming agreement on the importance of public funding highlights a significant recognition of the challenges facing the arts sector and the strong demand for financial support.

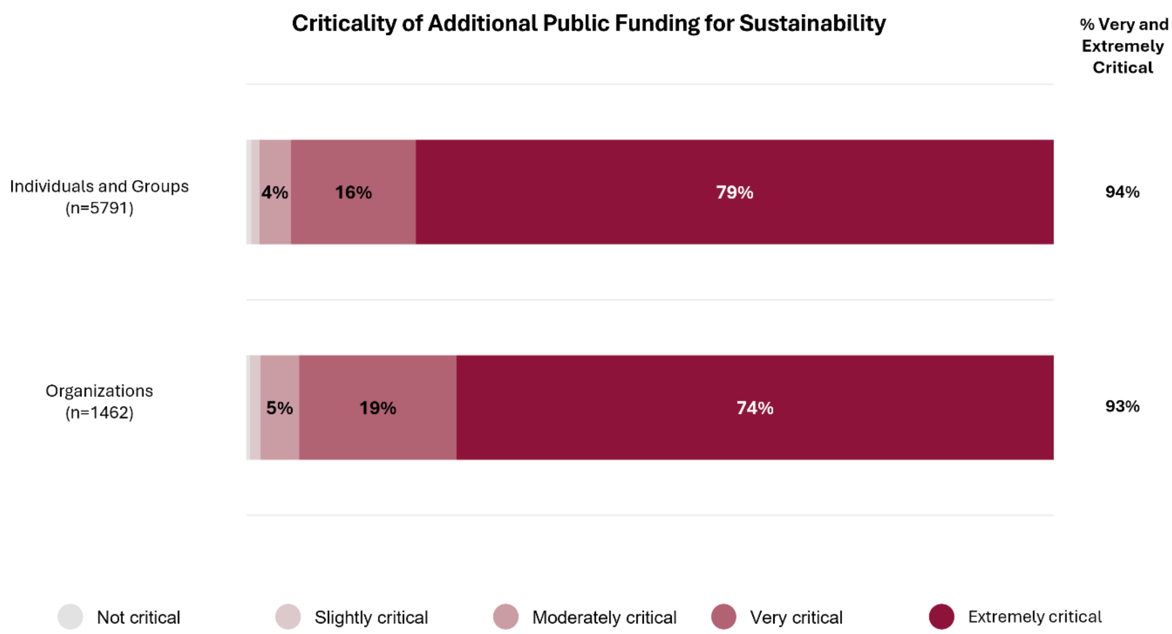

Figure 8: Criticality of Additional Public Funding to Transform and Adapt to be More Sustainable

While most respondents agreed that additional public funding is critical, there were some variations. Those who had not received any public funding were significantly less likely to agree that additional public funding is critical compared to those who received funding. Among individuals and groups, 92% of non-recipients expressed this view, while 96% of both recipients of Council funding and of other sources of public funding did. Similarly, for organizations, 83% of non-recipients agreed, compared to 94% of recipients of Council funding, and 93% of recipients of funding from another public source.

Regardless, the overwhelming majority of respondents from both individuals and groups and organizations recognized the essential role of additional public funding in enabling the arts sector to transform, adapt, and achieve greater sustainability.

> *"Without the funding I've received there is zero chance I could have explored and created in the way I have over the past two years. It's been critical."* – Individual respondent

6.1.6 Key Areas for Funding or Additional Support

When asked to identify the areas where additional funding or support are most needed for both the arts sector and their organization to transform and adapt to be more sustainable, respondents indicated that it is very or extremely necessary in these areas: diversification of revenue streams, market and network development, public/audience engagement, accessibility, and donor development. Each of these areas is viewed as crucial for ensuring the long-term viability and resilience of the arts community, reflecting a collective recognition of the need to adapt to changing circumstances and expectations.

In addition to this list, some individuals mentioned that funding is needed for artist support, inclusion and diversity, and for fostering the creation of new work. Likewise, some organizations emphasized the need for additional support for infrastructure, operations and artist support.

Specifically, respondents highlighted the critical need for enhanced support for artists in various capacities. One organization underscored the importance of improving "capacity to properly host and present artists", while another stressed the necessity to "ensure artists' income". Individual respondents called for "support for artists during the creation phase." Furthermore, there were calls for increased assistance for "new, less established artists" and advocacy for "living wages for arts workers." These insights reflect the importance of artist support in transforming and adapting the arts sector in addition to diversification of revenue streams, market and network development, public/audience engagement, accessibility, donor development, and staff recruitment, retention, and engagement.

Table 1: Areas Where Additional Funding/Support is Very/Extremely Necessary

	% Very and Extremely Necessary		
	Individuals and Groups	Organizations	Core Organizations
Diversification of revenue streams	75%	61%	57%
Market and network development	71%	59%	58%
Public/audience engagement	71%	57%	56%
Accessibility	72%	43%	44%
Donor development	67%	58%	56%
Staff recruitment, retention, and engagement	59%	61%	67%
Revised business models	61%	36%	33%
Innovation and digital transformation	48%	38%	38%
Other	96%	77%	81%

6.2 Artistic Practice (Individuals and Groups)

The past two years have been exceptionally challenging for individuals and groups in the arts sector, significantly impacting their artistic practice. Many respondents reported difficulty in maintaining the impact of their artistic work, coupled with a notable decrease in opportunities to share their work in-person. These professional hurdles have been accompanied by substantial challenges related to mental health and well-being, making it increasingly difficult for many to continue working in the arts. When combined with the financial hardships outlined earlier, these factors paint a bleak picture of the arts sector's recent experience.

6.2.1 Impact of Artistic Work

The vast majority (96%) of individuals and groups said that it has been challenging for them to maintain the impact of their artistic work. Notably, around half (52%) said that it has been extremely or very challenging for them.

Those who did not receive funding from the Council (57%) were significantly more likely than recipients (46%) to say that maintaining the impact of their artistic work has been very or extremely challenging. Those who did not receive any public funding (63%) were significantly more likely to find it very or extremely challenging compared to those who received funding from another public funder (49%), showing that funding plays a role in maintaining the relevance and impact of artists' contributions to the arts sector.

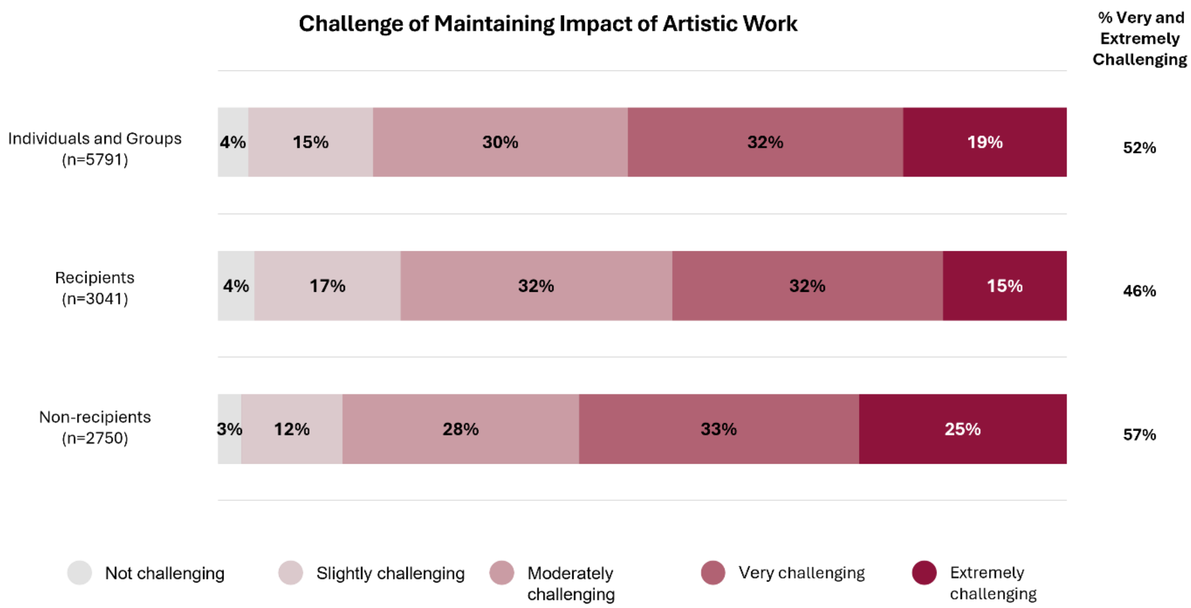

Figure 9: Challenge of Maintaining Impact of Artistic Work for Individuals and Groups

6.2.2 Opportunities to Share Work

Around half (52%) of individuals and groups said that the amount of opportunities to share their work in-person in the past two years has decreased, while a third (33%) said that it has decreased for online opportunities. The decline in opportunities indicates a significant challenge as it may limit their ability to connect with audiences and peers, potentially impacting their visibility and career development.

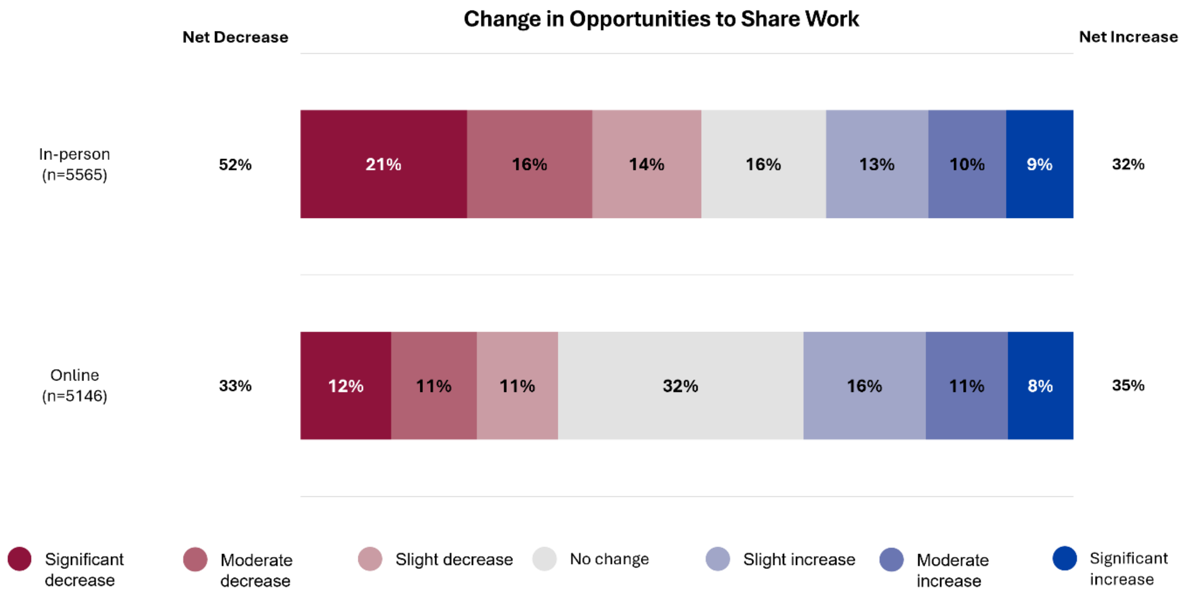

Figure 10: Change in Opportunities to Share Work for Individuals and Groups

When examining how opportunities to share work have changed in the past two years, there were notable differences between in-person and online opportunities.

For in-person opportunities, Council recipients were significantly more likely to report an increase (36%) compared to Council non-recipients (28%). Recipients of funding from another source were significantly more likely to report an increase in-person opportunities (33%) compared to non-recipients (25%). This suggests that those receiving support are better positioned to expand their sharing opportunities, emphasizing the importance of funding in fostering artistic engagement.

Furthermore, there were language and regional disparities. Anglophone respondents were more likely to report an increase (34%) compared to Francophone respondents (27%). Notably, since the majority of Francophone respondents are located in Quebec, this aligns with regional findings, where respondents from Quebec were less likely to report an increase in in-person opportunities (28%) compared to other regions. Respondents from other regions reported similar growth in in-person opportunities over the past two years, with British Columbia and Ontario both at 34%, and the Atlantic and Prairie provinces slightly higher at 36%.

Additionally, individuals and groups that belong to one or more strategic groups were significantly more likely to report an increase (34%) compared to their counterparts (26%).

In terms of online opportunities, there were regional variations as well, with respondents from Saskatchewan being the most likely to report an increase (53%), while those from Quebec were again less likely to say the same (31%). In other regions, reported increases were as follows: British Columbia (39%), Ontario (35%), Atlantic provinces (37%), and Prairie provinces (36%).

Relatedly, Anglophone respondents were more likely to report an increase in online opportunities (36%) than Francophone respondents (31%). Respondents from specific fields of practice, such as Media Arts (42%), Multidisciplinary Activities (44%), and Digital Arts (51%), were more likely to report an increase in online opportunities than those in other fields. Additionally, individuals and groups that belong to one or more strategic groups were more likely to report an increase (36%) compared to their counterparts (31%).

6.2.3 Continuing to Work in the Arts

The vast majority (95%) of individuals and groups reported that it has been challenging for them to continue to work in the arts in the past two years. Specifically, around half (52%) found that it has been very or extremely challenging.

While most respondents found it challenging to continue working in the arts, non-recipients (56%) were significantly more likely to state that it has been very or extremely challenging compared to recipients (48%). Those who did not receive any public funding (60%) were significantly more likely to state that it has been very or extremely challenging than those who received public funding from another source (51%), highlighting that funding plays a critical role in easing financial strain and sustaining work in the arts.

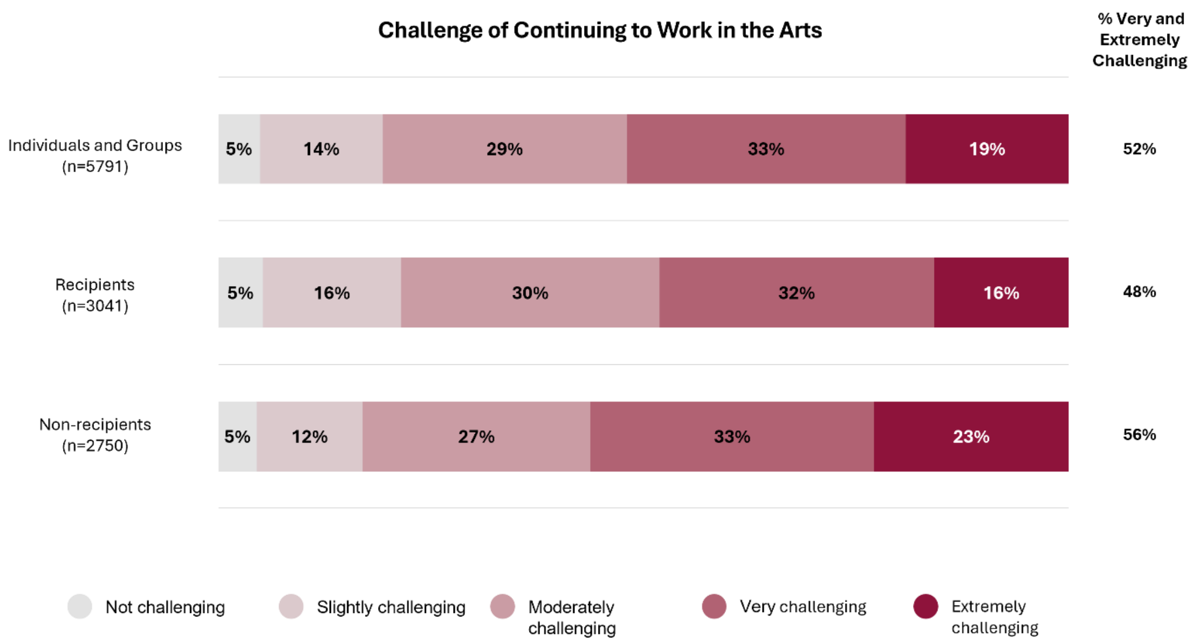

Figure 11: Challenge of Continuing to Work in the Arts for Individuals and Groups

There were significant variations by region and language. Respondents from Ontario were more likely to find it very or extremely challenging (58%) compared to other regions, especially those from Quebec (47%) and New Brunswick (39%). In other regions, 54% of respondents from British Columbia found it very or extremely challenging, while 50% of respondents from both Atlantic provinces and Prairie provinces found it very or extremely challenging.

This regional difference was reflected in the language findings, with Anglophone respondents (56%) significantly more likely to report that it has been very or extremely challenging than their Francophone counterparts (39%). Additionally, individuals and groups who belonged to at least one strategic group or community were more likely to report that it has been very or extremely challenging (54%) compared to those who did not belong to any (46%).

6.2.4 Mental Health and Well-Being

Most individuals and groups also reported they have experienced challenges related to mental health and well-being in the past two years (89%), with half (49%) saying that they have experienced them significantly or extensively. The high percentage of respondents facing mental health challenges signals a broad problem within the arts sector, possibly exacerbated by financial instability and employment uncertainty.

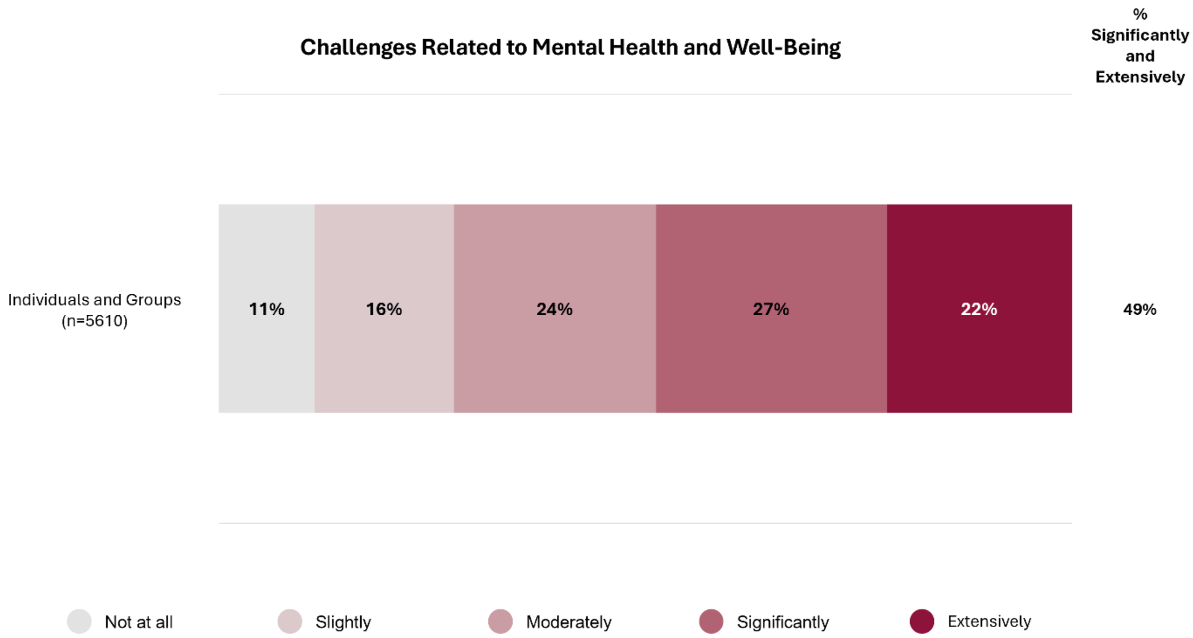

Figure 12: Challenges Related to Mental Health and Well-Being for Individuals and Groups

Regardless of their funding status, almost all respondents faced challenges with mental health and well-being, with 90% of recipients and 87% of non-recipients reporting such difficulties in the past two years.

Furthermore, respondents from Ontario were significantly more likely to report experiencing these challenges as significant or extensive (52%) compared to other regions, similar to the finding that respondents from Ontario were more likely to find it very or extremely challenging to continue working in the arts.

For fields of practice, respondents involved in Multidisciplinary Activities (61%) and Deaf and Disability Arts (74%) reported higher levels of mental health challenges compared to other fields. Additionally, those belonging to at least one strategic group were more likely to experience these challenges significantly or extensively (53%) compared to those not serving any specific communities (37%). In particular, respondents serving Deaf and disability communities (71%), 2SLGBTQI+ communities (64%), gender-diverse communities (71%), women (51%), and youth (64%) were especially likely to report significant or extensive challenges related to mental health and well-being, which reflects the compounded stress and emotional burden faced by marginalized and underrepresented groups.

6.3 Workforce (Organizations)

The workforce in organizations has faced considerable challenges over the past two years. Staffing changes varied, with equal proportions of organizations reporting increases, decreases, or no changes. Notably, recipients of public funding were more likely to experience staff growth compared to non-recipients. In addition, the majority of organizations struggled with recruiting and retaining staff, while also facing significant challenges related to the mental health and well-being of their workforce. These challenges mirror many of the difficulties reported by individuals and groups in maintaining their artistic practice during the same period.

6.3.1 Staff Change

A similar proportion of organizations said that the number of staff in their organization has increased (32%), decreased (33%) and has not changed (35%) in the past two years.

Council recipients (34%) were significantly more likely to say that they had an increase in staff over the past two years compared to those who did not receive Council funding (23%). On the other hand, non-recipients (45%) were significantly more likely to say that there was no change in staff numbers than recipients of Council funding (33%). Those who did not receive any public funding were significantly more likely to say that there was no change in staff numbers (57%) compared to recipients of public funding from another source (42%).

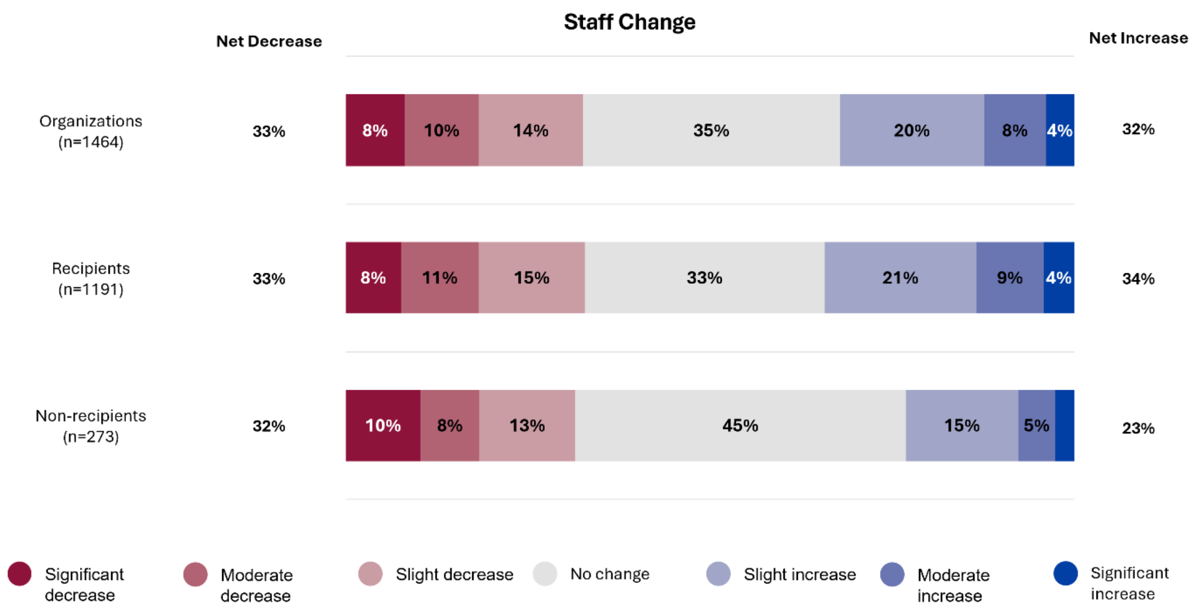

Figure 13: Staff Change for Organizations

The differences in staffing changes between recipients and non-recipients highlight the potential impact of funding on organizational capacity and growth, suggesting that funding could play a crucial role in enabling organizations to expand their workforce. In line with this, organizations with a budget size of $74,999 and under were significantly more likely to report no change in staff numbers (53%) compared to larger organizations. These smaller organizations were also less likely to report an increase in staff (16%), with a clear trend showing that as organization size increases, the likelihood of reporting an increase in staff rises. Smaller organizations likely have fewer resources to invest in personnel, limiting their staffing capacity and growth.

6.3.2 Recruiting and Retaining Staff

The majority (80%) of organizations also reported that it has been challenging for them to recruit and retain staff in the past two years, with a third (32%) saying it has been very or extremely challenging.

Organizations receiving operating grants from the Canada Council (89%) were more likely to express that it's been challenging to recruit and retain staff compared to other organizations. These organizations were also most likely to say additional support is very or extremely necessary for staff recruitment, retention and engagement (Table 1).

Recipients (82%) were significantly more likely to state that it has been challenging to recruit and retain staff than non-recipients (73%). Among recipients, core organizations (86%) were significantly more likely to report challenges in recruiting and retaining staff compared to other organizations.

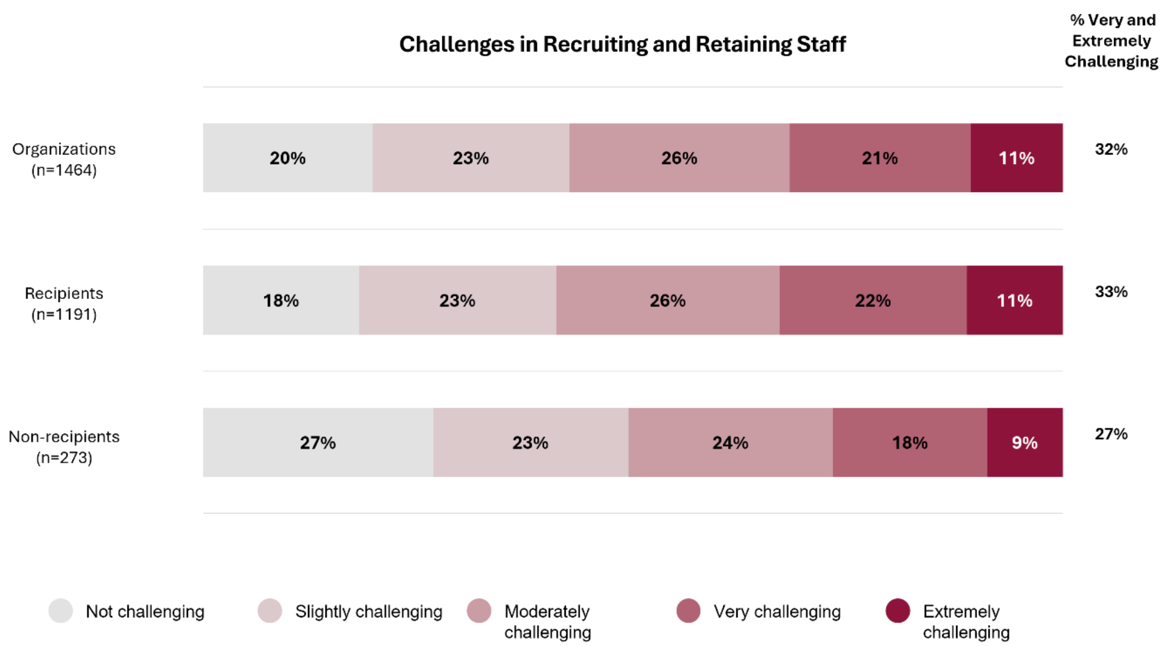

Figure 14: Challenges in Recruiting and Retaining Staff for Organizations

The challenge of recruiting and retaining staff varied across different regions, sectors, and organization sizes. Respondents from Quebec were significantly more likely to report challenges (86%) compared to other regions. In comparison, respondents from the following regions reported challenges in recruiting and retaining staff: Ontario (80%), British Columbia (78%), Atlantic provinces (74%), and Prairie provinces (74%). Similarly, Francophone respondents (86%) were more likely to experience these challenges than their Anglophone counterparts (77%).

Not-for-profit organizations also faced greater recruitment and retention challenges (82%) compared to for-profit organizations (70%). Furthermore, the challenge increased with organizational size—organizations with an operating budget of $1,000,000 or more (89%) were significantly more likely to report challenges than those with budgets of $74,999 or less (68%).

6.3.3 Mental Health and Well-Being

Similar to individuals and groups, the majority (84%) of organizations have also experienced challenges related to the mental health and well-being of their staff in the past two years, with around a third (36%) reporting that they faced these challenges significantly or extensively.

Recipients (86%) were significantly more likely to report experiencing mental health and well-being challenges than non-recipients (75%). Looking more closely, organizations receiving operating grants from the Canada Council (89%) were significantly more likely to say they experienced these challenges compared to other organizations, with two in five (40%) saying it was significant or extensive.

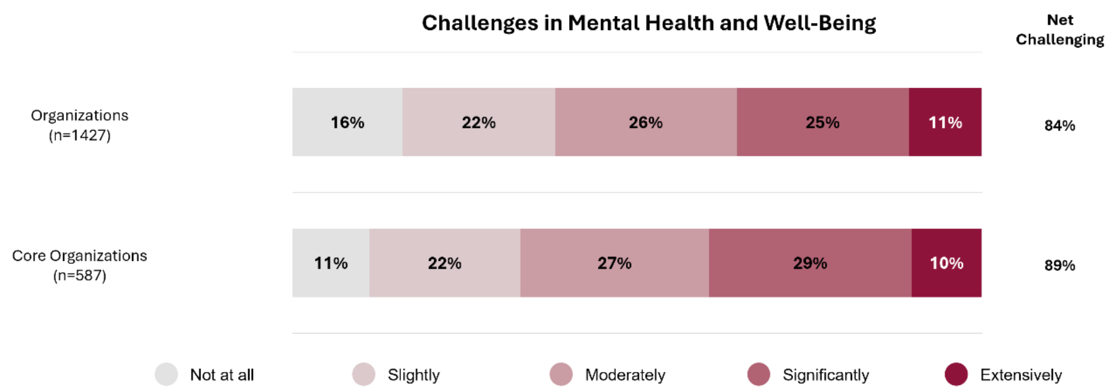

Figure 15: Challenges in Mental Health and Well-Being of Staff Experienced by Organizations

Furthermore, Anglophone respondents were more likely to report experiencing this challenge (87%) compared to Francophone respondents (78%). Additionally, the challenge increased with organizational size—organizations with an operating budget of $1,000,000 or more (92%) were significantly more likely to face mental health and well-being challenges than those with budgets of $74,999 or less (72%). These findings echo the earlier results regarding the challenges of recruiting and retaining staff, where larger organizations also reported greater difficulty. As operating budgets increase, both recruitment and retention, as well as mental health and well-being, become more pressing issues for organizations.

6.4 Programming and Public Engagement (Organizations)

Organizations have faced significant challenges in sustaining the impact of their programming over the past two years. While audience attendance and public engagement have generally increased, both in-person and online, the rising expenses and decreased revenues have made this growth unsustainable without additional funding. Coupled with ongoing struggles in workforce management and financial instability, these factors underscore the immense difficulties the arts sector has endured during this period.

6.4.1 Maintaining Impact

Most organizations (91%) agreed that it has been challenging for them to maintain the impact of their programming in the past two years, with a third (33%) saying that it has been very or extremely challenging.

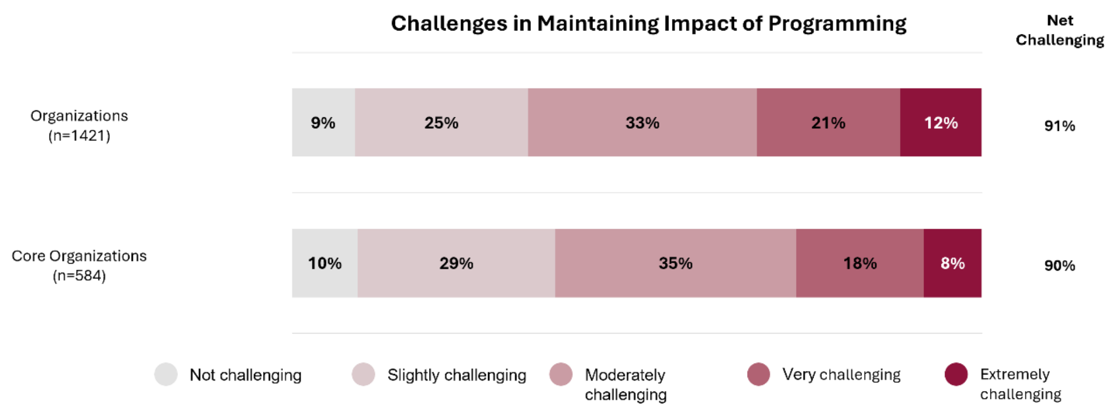

Figure 16: Challenges in Organizations Maintaining Impact of Programming

Regardless of their funding status, almost all respondents faced challenges with maintaining the impact of their programming, with 91% of recipients and non-recipients reporting this. Non-recipients were more likely to say that it has been very or extremely challenging (41%) compared to recipients (31%), especially core organizations (27%), showing the importance of funding in supporting organizations in maintaining their programming impact.

6.4.2 Change in Public Engagement

Despite having faced these challenges, the majority of organizations indicated that their audience attendance or public engagement had increased in the past two years. Half (51%) reported that their in-person audience attendance or public engagement has increased, while two in five (40%) say that it has increased for their online audience attendance and public engagement.

A quarter of respondents (24%) reported no change in their online audience attendance or public engagement, compared to 13% for in-person attendance. Additionally, 36% noted a decrease in both online and in-person audience attendance or public engagement.

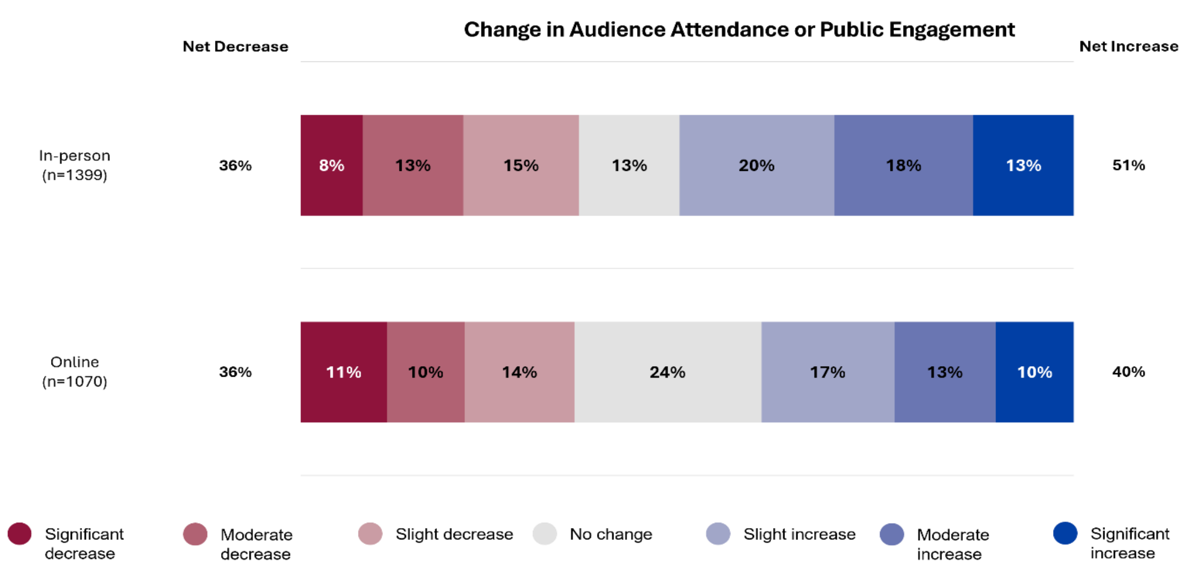

Figure 17: Change in Audience Attendance or Public Engagement for Organizations

6.5 Impact of Public Funding

Public funding has been essential in supporting the arts sector, with many individuals, groups, and organizations reporting that it has allowed them to expand their activities, experiment, and reduce financial stress. Beyond the direct benefits to those who received funding, the broader community has also seen positive impacts. Most respondents noted that public funding has raised visibility for their artistic practices, contributed to community well-being, and supported the local economy. Public funding is crucial for building long-term sustainability and enabling the arts sector to continue making meaningful contributions.

6.5.1 External Public Funding

Among those who did not receive funding from the Council in the past two years, 38% of individuals and groups and 79% of organizations, reported receiving public funding from other funders during this period, highlighting the importance of different levels of public funding in supporting the arts sector.

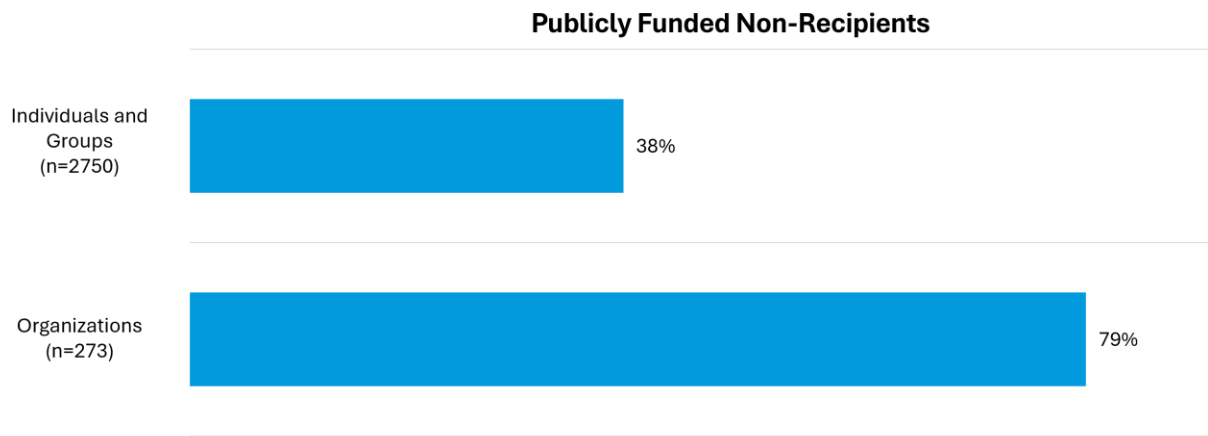

Figure 18: External Public Funding

There were notable differences in receiving public funding across various segments of respondents. Groups were significantly more likely to report receiving public funding (52%) compared to individuals (37%). Regional differences were also evident, with respondents from British Columbia (29%) and those outside of Canada (21%) being less likely to report receiving public funding than those from other regions. Language played a role as well, with Francophone respondents (46%) more likely to report receiving public funding compared to Anglophone respondents (35%). When examining specific fields of practice, those involved in Theatre (49%) and Dance (52%) were more likely to report receiving public funding than other fields.

Among organizations, not-for-profit entities were significantly more likely to report receiving public funding (83%) compared to for-profit organizations (59%). Furthermore, organizations that owned or had long-term operational responsibilities for a facility or venue were significantly more likely to report receiving public funding (92%) than those without such responsibilities (74%). In terms of organization size, those with an operating budget under $75,000 were significantly less likely to report receiving public funding (60%) compared to larger organizations.

These findings highlight that survey responses show differential access to funding across a number of variables, highlighting a need to better understand the access to funding at different levels across regions.

6.5.2 Impact on Individuals, Groups and Organizations

When asked about how public funding has helped them, their group, or their organization in the past two years, most respondents said it has helped them, especially with expanding or improving their activities, allowing them to experiment, innovate or try something new, reducing their financial stress and helping them foster important new relationships.

In addition to this list, some individuals mentioned that public funding has helped them achieve financial stability, sustain their livelihood and maintain their artistic practices. Similarly, some organizations stated that public funding has supported their efforts to build resilience and financial sustainability. The positive impact of public funding on these activities highlights its importance and necessity for growth within the arts sector.

Table 2: Impact of Public Funding on Individuals, Groups and Organizations (Net Agree)

	% Net Agree		
	Individuals and Groups	Organizations	Core Organizations
Expand or improve its activities	86%	69%	59%
Experiment, innovate or try something new	86%	67%	61%
Reduce financial stress	82%	75%	74%
Foster important new relationships	80%	62%	57%
Develop knowledge or acquire new skills	79%	54%	54%
Share skills and resources	74%	59%	57%
Hire or engage other people	74%	58%	51%
Define my/its vision	76%	48%	44%
Other	83%	82%	89%

Overall, public funding has been very impactful on individuals and groups, enabling them to achieve a range of important outcomes. It has helped them especially with the expansion and improvement of their activities and has allowed them to experiment and innovate. One individual respondent noted that public funding helped “improve [their] mental health (through financial stability and better work/life balance),” highlighting its broader benefits. Additionally, it has allowed artists to maintain their artistic practice, with one respondent sharing that it enabled them to “create higher quality artistic work [they are] proud to share with others.” Similarly, organizations emphasized how public funding has supported their resilience and long-term sustainability, with one stating it helped them “develop sustainable practices.” These findings collectively emphasize the pivotal role public funding plays in sustaining and enhancing the arts sector.

6.5.3 Impact on Communities

Furthermore, when asked about what impact the public funding they received had on their community, at least three in four respondents said that it has helped them raise visibility for an artistic practice or artistic community within Canada or abroad, contribute to the well-being of a community, and contribute to the local economy.

Table 3: Impact of Public Funding on Communities (Net Agree)

	% Net Agree	
	Individuals and Groups	Organizations
Contribute to the well-being of a community	76%	86%
Raise visibility for an artistic practice or artistic community within Canada or abroad	78%	80%
Contribute to the local economy	75%	83%
Facilitate understanding and meaningful dialogue across different cultures or groups	72%	76%
Contribute to Indigenous cultural revitalization or continuity	41%	60%

Overall, public funding had a far-reaching influence, empowering individuals, groups, and organizations to make a meaningful impact on their communities.

7 CONCLUSION

The findings from this research reveal that the arts sector continues to face significant financial, operational, workforce and mental health challenges in the current landscape. Individuals, groups, and organizations alike have also experienced financial instability, reduced revenues and increased expenses, highlighting the widespread impact across the sector.

Despite these challenges, organizations, groups and individuals are willing to undertake transformation and adapt to be more sustainable. Public funding is critical for supporting this transformation, particularly in areas such as diversifying revenue streams, market and network development, and public/audience engagement. The impact of public funding extends beyond the arts sector, contributing to the visibility of artistic communities and fostering community well-being. This further demonstrates the necessity of continued investment in the arts as a means to enrich Canadian communities and ensure a vibrant cultural landscape.