

Market Development and Touring Program Needs Assessment

Final Report

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1. Executive Summary

In the arts sector, market development captures a broad range of activities related to the export, touring, presentation, audience building, and marketing of artists and their work. Prior to the pandemic, Ontario Arts Council (OAC) played a pivotal role in supporting Ontario's arts sector in these market development endeavours through their Market Development and Touring Programs, and more recently through the Artist-Presenter Collaboration (APC) project grant program. However, with the earlier two program streams suspended during the pandemic, OAC has taken the opportunity to review its market development and touring programs in the post-pandemic arts sector context.

To that end, Nordicity was tasked with conducting a needs assessment of the Ontario arts sector to provide insights that will help OAC determine how to best support the market development and touring activities of artists and arts organizations overall, across disciplines and priority groups.¹ This report captures the findings of research including interviews with 12 key stakeholders² in the Ontario arts sector, a scan of 125 funding programs across Canada, and light desk research on market development trends. The research was conducted from June to August 2022.

What are the current and forward-looking trends impacting the market development and touring landscape?

- Digital has become fully integrated into market development activities in the arts sector and is likely to remain so. As technology evolves, more **digital changes** are looming on the horizon. The emergence of the **metaverse** is expected to have a future impact on touring and presentation in terms of providing more opportunities for artists to reach wider audiences across the globe without having to travel, and monetization opportunities through NFTs. It is expected that in the future, more artists will be able to take advantage of performing and touring in the metaverse.
- While digital is here to stay, there is widespread interest for a **return to live** experiences in a post-pandemic environment. However, live events are facing challenges in resuming the normal pace of activities.
- Community **engagement** and more visceral **connection** is likely to be a lasting impact post-pandemic.
- The pandemic has also given rise to a **greater social and cultural awareness**, and as such, more organizations are looking to connect with equity-deserving artists and groups and to restructure their organizations.

¹ Priority groups include those designated by OAC: Artists of Colour, Deaf artists and Artists with Disabilities, Francophone artists, Indigenous Artists, New Generation Artists (18-30 years old), and Artists Living in Regions Outside of Toronto.

² The stakeholders consulted represent the priority groups listed above and the breadth of art sectors supported by OAC.

- Lastly, ecotourism and increasing **environmental concerns** will bear more weight in planning future touring activities.

What are the current challenges and needs of artists, arts groups, presenters and arts organizations with respect to market development and touring activities?

While the challenges and needs differ among disciplines, commonalities include the following:

- The rise in digital has exposed a **challenge in digital capacity** and a **lack of digitization support** in the funding ecosystem. More support is required for hybrid programming and building digital capacity in the arts sector.
- **Rising costs** due to steady inflation has led to higher expenses for market development projects. As such, there is a need for higher funding caps to support these project expenses.
- The arts sector is under-resourced and many organizations, particularly smaller organizations, lack the ability to retain administrative staff who are critical to carrying out market development. As such, more **administrative support** and training is required.
- The funding landscape is overall complex and difficult to navigate for artists given the need to piece together funding from multiple sources. As such, more **visibility of the opportunities available** is required, as well as more assistance from arts service organizations and presenters in the ecosystem.
- The pandemic has bred more **uncertainty**, pointing to a need for more **flexibility** in grant programs and an opportunity to plan for contingency funding.

There are also several challenges and needs expressed by OAC's designated priority groups. Key findings indicate that some are not at the stage where they are thinking about market development, and/or do not necessarily fit 'export ready' qualifications. This lack of readiness points to a need for more **professional development** opportunities, and a need to **expand how market development is defined**. Many equity-deserving artists and organizations also express frustration with mandated target export markets, indicating that many of those markets are often tied to Western ideals of art.

What are the gaps in the market development and touring support ecosystem? What funding and programs are currently being offered by other arts funders provincially and nationally?

Our scan of 125 federal, provincial, and municipal funding programs revealed gaps in the market development funding landscape that present opportunities for OAC.

- There appears to be a **lack of support for presenters** in the ecosystem, even though they are integral to the market development ecosystem. Only 24% of market development and touring programs consider presenters as eligible applicants.
- At the provincial level in Ontario, there is a lack of strategic support to develop **international** markets, but interviews emphasize that **promoting Ontario** on the international stage should be prioritized.

- There also appears to be a **lack of support for emerging artists** to engage in market development. Most funding programs tend to support what would be considered traditional market development activities, such as networking and industry events, domestic or international showcases and events, and activities related to the exhibition, presentation, dissemination, and marketing of arts products. Only a few funding programs support professional development, but emerging artists need access to market development programs that support their development as artists and building their brand.

Conclusion

The findings from this study indicate that the Ontario arts community is facing an evolving and unstable environment for market development and touring activities – and that agile supports are needed as the economy continues to recover and evolve.

2. Introduction

Prior to the pandemic, the Ontario Arts Council (OAC) established two streams of programming to support the trajectory and mobility of artists and their development in the marketplace: Market Development programs which included project grants and travel assistance, and a Touring program. Both initiatives were suspended during the onset of the COVID-19 pandemic and temporarily replaced with the Artist-Presenter Collaboration Projects (APC) program. The APC program was intended to encourage collaboration between artists and presenters and promote the dissemination of artistic works from Ontario within the province and beyond. The Artist-Presenter Collaboration Projects program included support for touring and market development activities, though in ways that were not identical to how these activities were supported in the suspended Touring and Market Development programs.

Much has changed in 2022 as the arts sector emerges into a post-COVID environment. The time is ripe to revisit the current and most urgent needs of artists and presenters in Ontario as it relates to carrying out market development and touring activities. As such, Nordicity was tasked with conducting a needs assessment of the Ontario arts sector to help inform the redesign of the Ontario Arts Council's market development and touring support mechanisms.

2.1 Notes on the Scope of Research

The scope of this research was targeted and streamlined to address immediate programming decisions at OAC in an agile way. The OAC was interested in getting a snapshot to understand the context of market development and touring in the Ontarian, Canadian, and international arts sectors in a post-COVID environment. As such, the engagement plan consisted of strategic interviews with 12 key stakeholders in the Ontarian and Canadian arts community that represent the priority groups and sectors that OAC supports.

This report is structured in a way that provides a snapshot of responses to a set of targeted research questions, as listed below.

Key Research Questions**Overarching Trends in the Market Development Landscape**

What are the current and forward-looking trends impacting the market development and touring landscape?

Challenges and Needs

What are the current challenges and needs of artists, arts groups, presenters and arts organizations with respect to market development and touring activities? What are the differences by discipline and priority group?

The Market Development Funding Ecosystem

What are the gaps in the market development and touring support ecosystem? Do there need to be dedicated programs for market development and touring? What funding and programs are currently being offered by other arts funders provincially and nationally?

3. Methodology, Research Instruments, and Scope

This research was carried out from June – August 2022. Nordicity undertook a lean approach which relied on sector engagement and a comparative scan of select market development programs across Canada, including:

- **12 interviews** with key stakeholders in Ontario’s arts sector, including artists, presenters, arts service organizations, artist managers, and funders.
 - These individuals were representative of priority groups³ designated by OAC, as well as the array of disciplines OAC supports.
- A review of **125 federal, provincial, and municipal funding programs** across Canada to better understand the market development funding ecosystem, identify trends in market development support, and draw inspiration from models available in other jurisdictions.⁴
 - Market development and touring funding programs were understood as those supporting the networking, presentation, marketing and exposure activities of artists with the goal of business, brand, network growth and professional development in mind. Funding programs examined included those that support networking and other collaborative initiatives, domestic or international showcases or events, the exhibition, presentation, dissemination, and marketing of arts products, as well as any professional development related to these activities.

4. Overarching Trends in the Market Development Landscape

Market development and touring programs are valuable, much-needed assets in Ontario’s arts sector. It is unanimously believed that Ontario Arts Council should continue its support of touring and market development, yet the manner in which stakeholders believe these programs should return varies due to the societal changes that have occurred since 2019. There are several trends presently impacting the market development and touring landscape in Ontario, as well as some predicted trends to keep an eye on in the future.

³ Priority groups include those designated by OAC: Artists of Colour, Deaf artists and Artists with Disabilities, Francophone artists, Indigenous Artists, New Generation Artists (18-30 years old), and Artists Living in Regions Outside of Toronto.

⁴ Note that this scan excluded operating funding programs that may be used to support market development activities. Additionally, the quantitative analysis conducted excluded temporary COVID-19 relief programs so as not to skew the sample.

4.1 Current Trends

- **Greater collaboration:** While public health restrictions kept people physically separated, the pandemic encouraged the arts sector to embrace collaboration. There is a greater sense of community within Ontario's art sector, a trend which lends itself nicely to market development.
- **Cultural shift:** The pandemic shed a light on social issues, intensifying a cultural shift where historically marginalized communities are being prioritized in terms of receiving public support. Those that fall within IBPOC, 2SLGBTQ+, and Deaf and Disability communities are increasingly being invited to the table to access public supports and improve granting processes. There has also been a wider shift in the arts community to improve equity practices, particularly in terms of restructuring leadership positions and making organizations more representative, equitable, and diverse.
- **Recognition of digital as part of the value chain:** The pandemic has led to an increase in the use of digital platforms and the production of online events. Digital tools and platforms are seen as an accessible way of reaching audiences, connecting with creative peers, and networking with a wider range of collaborators. Digital technology presents increased opportunities for discoverability - from allowing audiences to find new artists/artworks online, allowing them to find local performances/exhibitions happening in a specific location at any time, to allowing artists to identify new markets through analysis of their web audience analytics. Digital platforms offer possibilities to increase audience touchpoints and expand audiences before, after, and during in person events. For example, before deciding to attend an exhibit, someone may search for an artist's portfolio online. After, they may seek to purchase their works and/or share them within their own digital networks. Using digital tools and platforms for marketing and market development are now seen as an integral part of the market development process and a way of building out of province/country markets, and no longer a "nice to have" add-on.
- **A return to live:** While digital forms of creation, presentation, dissemination, and general ways of working have become more widely accepted in the arts sector, there is an even greater desire to return back to in person events and models of business. Audiences and artists/creatives alike crave in person connection, though there is still a hesitancy preventing audiences from returning to live events in full. While in person events are returning, some creatives are continuing to explore digital creation and hybrid dissemination of content.
- **Pent up demand:** There has been an increase in artistic creation throughout the pandemic and as live events return, artists are now wanting to tour their creations. This pent-up demand is putting pressure on venues and presenters alike, as the supply of opportunities to showcase work cannot match the demand.
- **Restarting challenges:** Exacerbating the issues related to the pent-up demand, live events are running into many challenges relaunching. Ontario has seen many recent spring/summer festivals, concerts, and other events either modified at the last minute, severely challenged during events due to a lack of staff and/or coordination between different vendors (supply chain challenges), and/or cancelled entirely. Presentation and

touring companies therefore need more support to effectively relaunch in person events.

- **Tourism considerations:** There is somewhat greater awareness and sensitivity around travel in terms of cultural values and environmental impact. What it means to travel and visit another place can sometimes be disrespectful to the ancestral relations in a land. Additionally, growing environmental concerns around the impact of touring are leading to more thoughtful planning to reduce a tour's environmental footprint.

4.2 Forward-Looking Trends

What is in store for the future of market development and touring? Our findings suggest present trends will continue into the foreseeable future.

- **The continued rise of digital and the metaverse:** Many feel that digital is here to stay and is an important way of networking, collaborating, and developing audiences outside of Ontario and Canada. As such, digital will continue to have a place in market development and audience engagement in the long-term. Moreover, though nascent, the metaverse is likely to have a looming impact on the way in which artists can perform in the future and may provide artists with a cheaper and more environmentally friendly alternative to touring. It is expected that more artists will be able to take advantage of performing and touring in the metaverse in the future, allowing them to readily reach global audiences and monetization opportunities through NFTs. Some individuals and organizations are even considering purchasing virtual land for this cause. As a result, more flexibility is required to ensure that programs are ready to accommodate a more immersive virtual future and the potential touring opportunities that may result.
- **Environmental considerations:** Environmental impacts of tourism are likely to influence the way in which tours are run in the future. Strategic thinking around touring will be increasingly valued in future to reduce environmental impact. For example, tours with a high density of locations can mean less environmental impact/carbon footprint caused by audiences travelling long distances to destination events; longer tours (as opposed to supporting short tours in scattered locations) with more performances or exhibitions amortizes the carbon footprint of a production by getting more use out of the materials produced for a performance or exhibition. Additionally, the emergence of the metaverse is likely to tie into ecotourism as a means of providing virtual and environmentally sustainable alternatives to touring around the world.
- **A focus on community engagement:** With renewed desire for in person connection due to the pandemic, there is likely to be more emphasis on meaningful and visceral community engagements in live events. Interviewees indicated that Indigenous practices also align with this focus on community engagement and relationship building. Longer engagements and pre-engagements leading up to a market development event or tour should be expected and will likely be built into the planning process. Community engagement will likely be seen as just as important – if not more so – than the live performance or event itself.

- **Continued socio-cultural shifts:** There will continue to be a huge socio-cultural shift in the arts sector as organizations look to become more representative, inclusive, and equitable, especially in their leadership. It will be important to find the best way to support the sector as organizations make this transition.

5. Challenges and Needs

5.1 Overview

Discussions with sector stakeholders revealed several common challenges and needs relating to market development and touring. These insights are captured in the following table.

Challenges	Needs
<p>Lack of support for digitization and digital upkeep and limited digital capacity.</p> <p>Even in this post-pandemic world, there is little to no support for the digitization of artwork and materials and the creation of digital materials/websites to promote an artist and their portfolio. More support emerged for digitization through the pandemic, but it is not enough to support the need in the arts sector.</p> <p>Some artists are more able to navigate the digital landscape and build a digital brand, while others find it challenging and rely on arts service organizations (ASOs) where possible to provide assistance. However, digital capacity is lacking not just for artists but for arts organizations.</p> <p>Artists that have not been able to digitize their work are missing out on opportunities for exposure and audience development. Artists and arts organizations that have been able to digitize their work or leverage digital platforms (e.g., using e-commerce platforms) often find it challenging to find the support to maintain these platforms in the current ecosystem.</p>	<p>More support for hybrid activities</p> <p>In a post-COVID environment, digital is seen as an important complement to live experiences. Live events are still very much where and how artists generate revenue and have the most success building networks. Digital is viewed as a key aspect of market development activities for relationship building, attending out of town conferences, and networking. Exhibitions and performances are still primarily focused on live experiences, but often are expected to have digital counterparts. Moreover, digital platforms have been firmly engrained in the audience development process, so it is integral that artists promote themselves through hybrid means in the future.</p> <p>As such, funding programs should be more flexible to support in person activities but also digital tools and digitization processes as they relate to market development and touring.</p> <hr/> <p>Digital capacity building and training</p> <p>Artists and organizations alike require more training and support to build digital capacity. Digital capacity building should be a supported market development activity.</p>
<p>Rising costs</p> <p>The cost of market development and touring activities are continuing to increase. Specifically, the cost of travel, accommodations, shipping, labour and materials have increased, which makes it challenging for artists and presenters to stay afloat, and is a particular challenge for smaller artists, groups, and organizations. Tours are becoming more expensive, yet artist fees have</p>	<p>Increased grant sizes and relaxed funding caps</p> <p>With rising costs, grant sizes simply need to increase or at least funding maximums need to be relaxed to account for higher expenses incurred in market development and touring projects. Additionally, with hybrid programming becoming more prominent, grant sizes also need to increase to provide enough room for both digital and in person components.</p>

remained stagnant. There is also greater pressure on presenters to be able to provide more attractive artist fees.

Capacity limitations

The arts are regularly under-resourced, so managing various project grants to create, tour, and develop markets for different projects can be a challenge, and the number of application and reporting requirements can become a barrier to access. Many interviewees feel that project grants are not necessarily suited for market development projects, and that continued operational support is needed instead. The labour required to plan a touring project is extensive, and the process continually repeats. This cyclical nature can present inefficiencies where, for certain projects, staff may be hired and trained just to be let go at the end of the project. Later when a new person is hired, the team goes through an identical training process.

Some artists and organizations refrain from applying for market development grants because it is outside of their capacity to carry out separate market development projects on top of their existing responsibilities.

Moreover, smaller volunteer or community-based organizations – who are often innovative risk-takers and are essential to the vibrancy of an arts ecosystem – often lack funds to sustain the administrative supports necessary to both apply for market development project grants and execute market development activities.

Less precarity in operations

Operating funding amounts remained relatively stagnant prior to the pandemic, despite consistent 2-2.5% annual inflation rates from 2017 onward.⁵ This suggests wages have also likely stayed stagnant within organizations. Limited growth in wages paired with increased operating expenses (e.g., to uphold public health guidelines, upkeep digital platforms, etc.) has encouraged organizations to seek out more project-based funding to compensate for lack of base funding infrastructure. Some organizations are so small that operating grants are their only support. They dedicate all their time to carrying out their mandate so audience development and touring falls in priority. Also, digital platforms require ongoing maintenance and monitoring to be effective tools for market and audience development.

More operating support would reduce precarity for arts organizations, enabling them to retain staff, pursue more market development activities, and maintain digital service offerings and marketing initiatives.

More administrative support

The lack of administrative capacity means there is less opportunity for smaller arts organizations to engage in market development activities. This challenge is more deeply felt by regional communities without local arts councils. As such, smaller, community-based organizations require more assistance in administrative functions, such as through an administrative support network supported by funders.

⁵ Ontario Arts Council funding data.

Labour market shortfalls

The arts sector, particularly community-based and volunteer led organizations, are challenged by staff shortages and are unable to sustain much needed administrative positions. These positions are necessary to allow organizations to carry out market development activities. Some stakeholders also expressed that there is a lack of market development skills and understanding in the sector.

Additionally, there is a looming shortage of arts administrators in the sector, who provide essential market development assistance to artists (e.g., managers and agents, among others), pointing to a need for more training.

More professional development opportunities

Artists, presenters, and agents require more training related to market development, such as how to network, how to build successful tours/exhibits/series, among other areas. More opportunities for artists, presenters, and agents to interact and connect are also needed, such as through informal community gathering events.

Build up emerging talent

The lack of emerging arts administrators and artist agents threatens the arts ecosystem and presents a critical challenge for succession planning. There is a need to fill this potential void through training and incentives.

Navigating the funding landscape

The current landscape puts much onus on artists to seek out funding opportunities and support; however, it can be challenging to navigate multiple grants and administrative processes. Not all artists have administrative mindsets, and many would rather focus on their art.

The piecemeal nature of market development funding can impede the progress of certain projects, for example, in the case where artists have to apply for and report on different elements of tour creation because they have to access multiple grants during this time.

Moreover, not all artists and organizations are aware of all funding opportunities and support available for market development.

Increased visibility of available public resources and support

More visibility is required on the opportunities that exist to support artists in market development/touring (e.g., other funding grants, consulates, etc.). Since many are piecemealing project funding, there is a need to further promote all existing opportunities.

More assistance from ASOs and presenters

Not all artists are equipped to navigate the granting landscape and acquire funding/support for their market development activities. As such, some stakeholders feel that ASOs and presenters should be given more targeted support to offer further opportunities in this area for artists. Supports might include training, conferences, networking events, delegations, showcases and other events to build networks and showcase their art domestically and internationally. Interviewees recognize that collaborative market development efforts are more effective, but individual artists and arts organizations often do not have the capacity to organize and manage these collaborations alone – reinforcing the need for more support from ASOs and presenters in this area.

Greater uncertainty

The pandemic has given rise to a greater sense of uncertainty and precarity. As well, the risks of carrying out in-person market development and touring activities are higher. For example, if shipping costumes/equipment via a commercial flight, there is a risk it may not make it in time due to ongoing logistical, labour, and capacity issues in the travel industry.

Increased flexibility and accessibility

The only thing that is certain about the current market is that it is uncertain and volatile. As a result of this uncertainty, there is a need for more contingency planning in market development and touring projects. Grant programs need to remain nimble to be able to respond to changes in the market development and touring landscape and prevent events from having to shut down. There is also a need for contingency funding in budgets and expense eligibilities to account for the reality of increased risks.

5.2 Key Findings and Insights, Arts Disciplines

Market development challenges and needs vary within Ontario’s arts sector. While the challenges and needs described above outline common themes across the sector, the table below outlines more nuanced insights from some arts disciplines.

Discipline	Market Development Activities	Key Findings and Insights
Book Publishing, Literature, and Literary Arts	Book tours, signings, in-store launches, conferences, book expos, literary trade shows, networking events, marketing activities (including digital), professional development training	<ul style="list-style-type: none"> ▪ Literature is a segment of the arts sector that has felt slightly under-represented in the market development landscape. ▪ The pandemic has led to a loss of in-person book tours, events, signings, and in-store launches. The loss of live events has had a major impact on authors and publishers in Ontario and across Canada. ▪ More virtual book events have popped up to replace live, such as webinars and virtual book signings and launches. There has also been a rise in social media trends (e.g., #BookTok, Bookstagram), which have helped improve marketing opportunities. However, fewer sales are made via virtual events compared to in person meaning digital cannot replace live. ▪ Metadata is of critical importance in terms of discoverability and marketing in the book industry. Proper metadata ensures that a book can be properly categorized and therefore more easily discovered through online platforms.
Music	Performances, tours, showcases, festivals, music expos, trade shows, conferences, networking events, marketing activities, professional development training, digital marketing	<ul style="list-style-type: none"> ▪ Pandemic disruptions continue to derail and disrupt tour schedules. Pent up demand for touring because of the pandemic has led to venues and presenters being overbooked, which has made it difficult to plan tours. ▪ Increased costs continue to make it much more expensive for artists and arts groups to tour, which makes touring and working in the music industry less appealing. ▪ Digital is seen as valuable in terms of facilitating networking and attending conferences in the music sector, as it provides opportunities for artists to collaborate and create across borders. However, music presentation and performances remain very much in the live domain. Digital performances in music are not as profitable as live ones; artists make more money from touring live and performing live that digital touring cannot replicate. ▪ While performances are still largely focused on in-person, there is an expectation now for artists and presenters to have hybrid programming at all events. This includes not only performances, but conferences and other events as well. Accommodating both components is costly and points to a need for increased grant limits. ▪ With live performances and tours being integral to the music ecosystem, there is a need to re-invigorate live and entice audiences back into performing halls. Although live music and events are returning, some audiences remain hesitant. Some

	<p>musicians have even left the industry because of the pandemic impacts and the challenges with touring and performing live.</p> <ul style="list-style-type: none"> ▪ Artist agents and managers are integral to supporting musicians' market development, as they help develop tours and promote the artist. However, they are often not part of the conversation and are omitted from provincial funding opportunities. While some federal support exists, it is challenging for smaller scale agents and those working in niche genres to access them. There is also a lack of new artist managers entering the industry, pointing to a need to incentivize and train new managers/agents who can navigate the market development landscape.
<p>Dance, Theatre, and Performing Arts</p> <p>Dance and theatre performances, tours, showcases, festivals, expos, trade shows, conferences and networking, marketing activities, professional development training, digital marketing</p>	<ul style="list-style-type: none"> ▪ Like music, digital is viewed as important for networking, conferences, and connecting artists to promote collaboration across borders. Presentation and performances are still largely focused on live, as they are not felt to translate well to digital platforms. ▪ That said, returning to the old model of touring is difficult for some in the performing arts. The level to which artists are doing in person versus digital activities in market development is mixed, and ultimately comes down to each individual or organization. Like music, there is an expectation for artists and presenters to have hybrid programming at all events. Accommodating both components is costly and points to a need for increased grant limits. ▪ The pandemic has also brought about a significant challenge with contingency planning in dance, theatre, and the performing arts. If a performer becomes sick and must isolate, it can derail a performance and even lead to an event's cancellation if a suitable substitute is not possible. This challenge is particularly prevalent in dance, as the choreography involved can make it difficult to call in a substitute at short notice. As such, there is a need for more flexibility in market development grants to allow for contingency expenses. ▪ Some feel that there is an opportunity available for larger Performing Arts Organizations (PACs) with the resources and means to sustain administrative staff. Smaller volunteer and community-led organizations and presenters on the other hand are often under-resourced and lack the capacity to retain administrative staff. Improved administrative support would allow these smaller organizations to improve their fundraising and marketing capabilities and run better tours overall. These smaller organizations are crucial to the ecosystem as they are seen as the risk-takers and presenters of non-commercial works.
<p>Media Arts, Visual Arts, and Crafts</p> <p>Exhibitions, expos, art, craft, and film trade shows and booths, physical and digital marketplaces, film festivals, marketing activities,</p>	<ul style="list-style-type: none"> ▪ Despite the existence of the Artist Presenter Collaboration program, the perceived absence of provincial market development programs from OAC has been a significant challenge for the visual arts sector, particularly for certain subsectors such as craft that have less success receiving federal supports.

conferences and networking, professional development training, digital marketing

- While strides have been made in the visual arts and crafts sector to incorporate more digital through online exhibits and sales, digital platforms do not reap the same financial returns as in person events. As such, in person is still key and prioritized, and will likely remain so. This is also true of media arts.
- In person events (e.g., exhibits, trade shows, etc.) are critical to building a career in the visual arts sector from networking to audience development. Relationship building through in person events is felt to be stronger and more successful than when facilitated digitally.
- That said, digital technologies are seen as important tools for research and archives and are viewed as a valuable way of increasing audience touchpoints between in-person events (e.g., visiting artist webpages, interacting further on social media and online forums, conducting online sales). Moreover, creating brochures for gallery exhibits (both in person and virtually) helps to add legitimacy to an artist. Exhibition brochures can be an impactful tool at exhibitions to make an artist more marketable.
- Overall, interviewees feel that hybrid is the way of the future for the visual and media arts, both in terms of sales and exhibition-based programming. They feel that any market development should be considered with digital in mind. Therefore, market development funding needs to support both in person events and digital components.
- Visual and media arts organizations are also under-resourced, much like the rest of the arts sector. There is a need to support smaller arts institutions to enable more touring, exhibition, and collaboration in remote communities. In fact, some galleries in Ontario are so small and under-resourced that they lack the means to receive an exhibition (i.e., they are unable to afford the artist fee, their gallery does not have appropriate digital infrastructure).
- There is a challenge regarding digital literacy in the visual arts and crafts sector, particularly in crafts. Artists who are more digitally savvy fared better throughout the pandemic than those requiring more assistance. Overall, more support is needed to build digital capacity and tools (i.e., funding that would allow this type of activity).
- A lack of support for the digitization of artwork and maintenance of websites is a challenge for media artists. Media arts is complex in that, some media artworks rely on digital modes of presentation while others cannot be easily digitized. For these artists, digital and in-person market development, presentation, and touring supports are needed.

5.3 Key Findings and Insights, Priority Groups

In addition to the findings by discipline, there are also some particular challenges and needs experienced by equity-deserving artists and the organizations representing them. Our findings are grouped and highlighted below:

- **Socio-economic disadvantages:** The current perceived absence of OAC's market development and touring programs has further revealed a socio-economic disparity for those in the arts who lack the financial support to pursue market development opportunities independently. Public funds are a much-needed asset for many equity-seeking artists.
- **Market development readiness:** Some equity-deserving groups are not ready to begin thinking about market development. For instance, rather than thinking about market development, the deaf and disability community is more focused on building themselves as a subsector and ensuring their community has enough income/funding to sustain themselves and be able to create their art. In other words, they are more focused on sector development as opposed to 'market development'. Moreover, the stage of an artist's career impacts the level of market development readiness. New generation artists are likely to require more support in developing their brand, soft skills, and understanding the market development landscape. As such, there is more support required for community building, networking, and mentorship to get some priority groups to the point of being able to think about market development. Skill building is required and a need to communicate the value of artists in the community.
- **Language considerations:** Some language commonly used in the market development landscape is viewed as exclusive and represents a lack of understanding of the realities of many equity-deserving artists.
 - For instance, the term 'export ready' – which refers to the conditions that allow an artist and their work to be ready for market – is often tied to those with access to the resources and infrastructure to properly package work for an exhibition, performance, show, or tour. However, many artists of colour and other historically marginalized artists are self-managed given a lack of infrastructure to support them in the ecosystem (e.g., many organizations tend to focus on Western art), which can be a disadvantage when trying to seek out export opportunities. More flexibility needs to be built into what is meant by 'export ready' and more support is required to help equity-seeking artists get to this stage.
 - Some arts communities in Ontario are in earlier stages of their development and therefore do not yet have the skills, knowledge, or capacity to undertake market development activities – which emphasizes a need for OAC to take a wide lens on the definition, understanding that for some communities, undertaking professional development/training activities will ultimately support their overall market development capabilities.
- **Limited market priorities:** Many expressed feeling limited by the specific target markets outlined by some funders. Moreover, markets outside of North America or Europe are often considered 'obscure,' which is offensive and centers around Western

ideals of art. Artists and presenters need to be given room and flexibility in touring funding and market development projects to expand into markets they deem appropriate and fruitful for their work.

- **Visibility of equity-deserving artists:** There has been increased inclusion of equity-deserving artists in market development and touring as a result of the cultural reckoning spurred by the COVID-19 pandemic. Now, more organizations are wanting to collaborate with equity-deserving artists but are finding it difficult to find them given that there have been limited prior opportunities for exposure. As such, communities in OAC's designated priority groups require extra support in terms of boosting their discoverability and visibility in the market.
- **Digital and accessibility:** For many, digital is seen as a way of improving reach and accessibility for many artists, especially those in rural and remote communities (e.g., many in regions outside of Toronto) and for Deaf artists and those with disabilities. Digital platforms have allowed artists in these communities to participate in festivals and events that they may not have been able to in the past due to a variety of accessibility challenges. That said, digital infrastructure still remains an issue for many in rural and remote communities – including for many Indigenous artists. Those in areas lacking stable internet also express a need for more accessible grant submission processes.
- **Under-resourced organizations:** Many organizations in the arts are under-resourced; however, the lack of resources is disproportionately experienced by equity-deserving organizations. In fact, some presenters indicate that they often lose out on securing artists to large presenters because they lack the funds to offer more attractive artist fees.
- **Relationship building:** Some equity-deserving groups, particularly Indigenous artists and organizations, express a need for more community engagement and relationship building considerations to be built into market development programs. Indigenous practices often require ceremonial work to be welcomed onto the land prior to an event, and it is also important to build trust and relationships prior to hosting the event or performance. It can take up to three to five days to hold these pre-engagements. More flexibility is therefore required in market development grants to account for this pre-engagement period, which also supports artists and organizations in building more lasting relationships with communities.

5.4 Perceived Benefits of Market Development

There are many benefits to investing in market development. When asked about the most important benefit of market development funding, the majority of stakeholders highlight the ability to **access international markets**. The Canadian market is small and saturated. As a result, it is imperative for the growth of Canadian artists to be able to build audiences abroad.

Other benefits of market development funding include the ability for **more performance and exhibition opportunities**, and similarly the ability to **sell more art** and product which leads to increased revenues. Many also point to the ability to connect, collaborate with others internationally, and **form new networks** as a key benefit of market development.

6. The Market Development Funding Ecosystem

Based on a scan of the market development funding ecosystem, market development is defined differently in public funding depending on the sector context. The terms market development, touring, and export are often used in public programming to describe similar activities, including:

- Participation in networking sessions, industry panels, and other collaborative initiatives;
- Participation in international delegations, showcases, markets, festivals, conferences, and other events; and,
- The exhibition, presentation, dissemination, or marketing of arts products.

Some market development programs recognize professional development and training activities if they relate to export readiness, marketing, and sales. Other programs focus on the execution of market development initiatives and tours.

Nordicity reviewed 125 market development funding programs across Canada, the breakdown of which is displayed in Figure 1 below. For a full list of the funding programs reviewed, please see Appendix A.

Figure 1: Market Development and Touring Programs Across Canada (n=125)

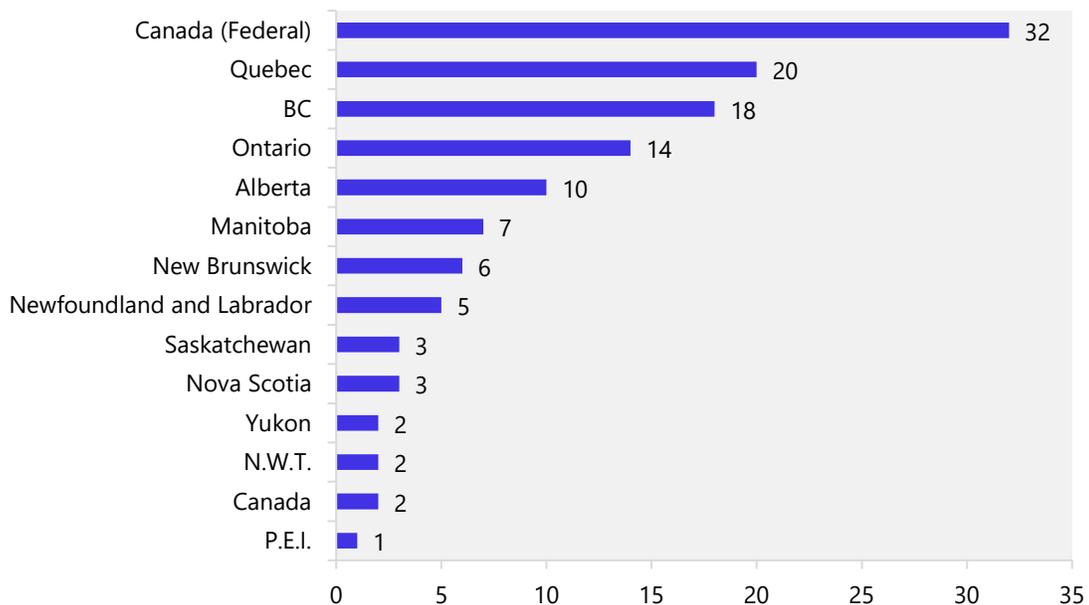
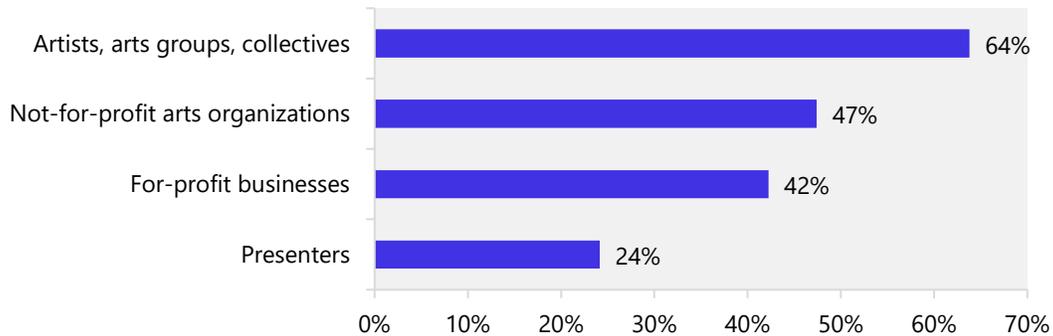


Figure 1 shows that artists, for-profit businesses, and not-for-profit arts organizations are able to access the most support for market development and touring at the federal level. There are also a notable number of programs available within Quebec (20), British Columbia (18), and Ontario (14)⁶.

⁶ Note this scan did not include Ontario Arts Council's programs.

Figure 2 below displays the eligible applicants supported by these programs.

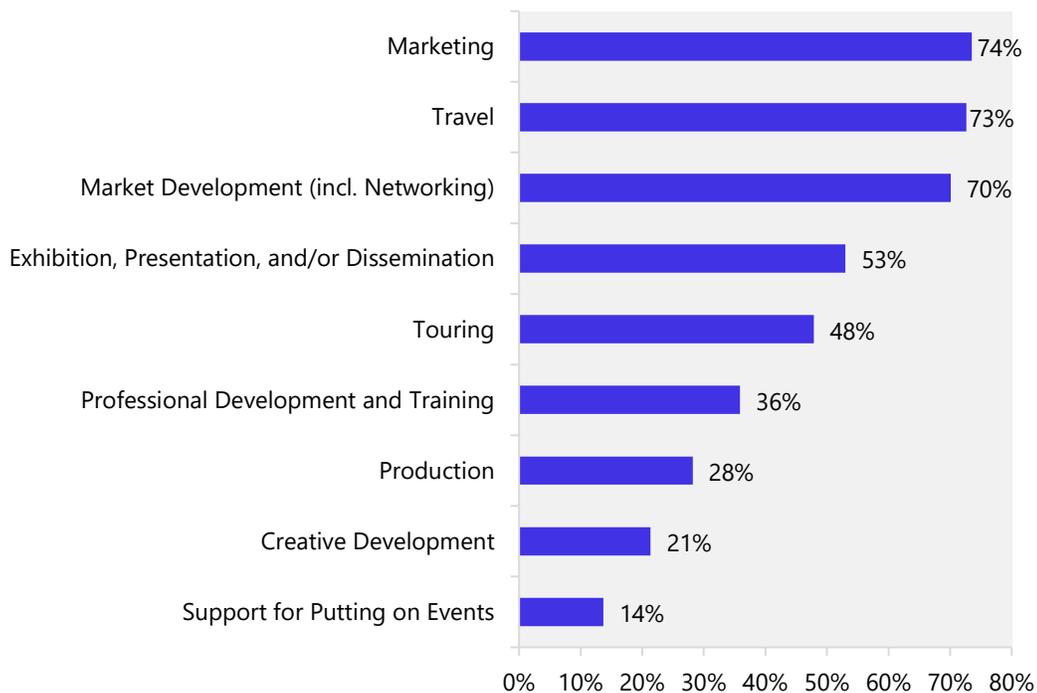
Figure 2: Types of Applicants Supported



Most market development and touring funding programs that were profiled support artists, arts groups, and collectives (64%), followed by not-for-profit arts organizations (47%) and for-profit businesses (42%). Presenters are the least supported in market development and touring programs.

The activities supported by these programs are displayed in Figure 3 below.

Figure 3: Types of Activities Supported (n=117)⁷



⁷ Note that some programs support multiple activities so the percentages will not sum to 100%.

Marketing (74%), travel (73%), and market development (70%) activities are the most supported activities of the grant programs scanned. There is less support available for touring (48%) and professional development (36%) activities. However, some market development grants also support market strategy planning, networking, and digital audience development. Professional development activities to build networking, marketing, and soft skills such as communication are also supported in some funds (36%). Digital marketing and capacity development are also often supported as part of programs that fund marketing and professional development activities.

Supporting professional development as part of market development is reflective of the nature of the arts sector. Artists are their brands, and therefore investing in the professional development of an artist is effectively supporting their marketability and market development. Additionally, since some communities and priority groups are not yet at a level to consider carrying out market development activities, supporting their professional development is an inclusive measure to establish the necessary skills needed for building market readiness.

6.1 Public Funding Trends

Our scan of the funding ecosystem shed light on a few salient trends, as listed below:

- Maximum **funding amounts** at the **federal level** tend to be **larger** than those offered by regional governments, likely due to a discrepancy in the budget cap of federal versus provincial governments.
- Provincial **economic development agencies** offer some of the strongest supports for market development in terms of number of programs and funding amounts. However, these programs mostly **cater to for-profit businesses in the creative industries**.
- There seems to be an abundance of support for market development activities in the **music sector** – with some dedicated programs also available for performing arts touring and book publishing market development activities. Visual arts and crafts do not often get their own market development supports and are instead supported under arts sector-wide grant programs.
- **Some programs are wide reaching** in that they support creation, distribution, and promotion activities across all arts sectors. **Others, mainly those in Canada's most populated provinces, tend to cater to specific sectors (e.g., music, publishing) and specific types of market development activities (e.g., strategic planning, market travel)**. The decision to offer broader support as opposed to targeted grants reflects the size of different regional applicant pools and the respective structure of the arts sector in those regions. Offering targeted grants, which appears more common among provincial and municipal funders, also reflects the nuance of market development activities and processes across sectors (e.g., visual art exhibitions versus music tours).
- Many project grants are not specifically designed for market development purposes but have market development activities built in as an eligible expense.

6.2 Funding Gaps

Based on our scan and interview findings, there appears to be a number of gaps within the market development funding ecosystem:

- Only about a quarter of public funding programs supporting market development and touring activities include **presenters** as eligible applicants, even though these groups are integral to supporting and promoting the market development and touring ecosystem.
- In provinces where funding programs are limited by the type of market development or touring activity (e.g., tour development, tour production, touring exercise), interviewees indicated that artists find it **complicated to manage the process of applying for different grants for different facets of a project**. Only 25 out of the 117 programs scanned⁸ support market development and touring across all stages of market development from creation through exhibition, suggesting that there may be opportunities to streamline programming to be less targeted and, as a result, less complex.
- There appears to be a **lack of support for emerging artists** to engage in market development activities. Emerging artists need access to market development programs to support artist development and build their professional brand, while more established artists may benefit from more traditional touring and travel grants.
- At the provincial arts council level, there is a lack of strategic support to develop **international markets**. Programs often support the development of all provincial, national, and international markets and tours, but interviewees emphasize that promoting Ontario on the international stage should be prioritized.

6.3 Program Highlights

The scan of the funding landscape in Canada revealed market development programs and initiatives worth noting in other Canadian jurisdictions, particularly Quebec and British Columbia.

Quebec

- Many interviewees pointed to Quebec as an exemplary model for supporting market and audience development for artists and the wider arts community. The Quebec government was highlighted in a number of interviews for its unique **“diplomatic” approach** to encouraging the market development of its artists.
 - For example, the Quebec government has cultural representatives at consulates and other embassies around the world whose job it is to market Quebec arts and culture, provide strategic market insights back to Quebec artists, and to

⁸ For which enough data was collected for analysis.

support the market development of their artists in different strategic markets abroad.

- The reason for Quebec’s success in the international market is a result of the province’s prioritization of international initiatives and export opportunities. The province is also lauded for its **presence and sponsorship of key export events and festivals**.
 - As an example of an international-focused funding program, the Secrétariat du Québec aux relations canadiennes (SQRC) has [a grant](#) that allows artists and organizations outside of Quebec to apply for funding to support Francophone events, in exchange for some visibility for Quebec artists and culture in their respective jurisdiction. Quebec also offers COVID-19 specific relief funding programs as a temporary measure to reinvigorate market development activities.

British Columbia

- The BC Arts Council has established an [Arts Impact Grant](#). This grant is flexible and was set up to fill gaps left by a series of other discontinued grants. It is a larger body of funds intended to support a variety of market development and touring activities. Wide reaching programs such as these offer flexible funding options to address the instability of global export markets, and ensure programs remain relevant and future proof. The OAC’s Artist Presenter Collaboration program was designed for similar reasons, that is, to bridge the gap left by suspended programs and to offer flexible funding options.

7. Conclusion

The research revealed that Ontario Arts Council’s market development and touring funding is a much-needed asset in the market development landscape. However, given the evolving challenges impacting the arts sector, there is a need to structure programs to better reflect a post-pandemic context, respond to equity considerations, and remain flexible for 2023 and beyond.

Digital technologies, pent up demand for in-person events, and changing public values because of socio-cultural shifts are trends that are currently impacting market development and touring activities. It’s predicted that the use of digital tools and platforms will become more prevalent, with environmental concerns heating up and the need for increased community connection and engagement more apparent. As the economy builds capacity to fully reopen in a post-pandemic context, rising costs, labour market shortfalls, and the uncertainty that comes along with supply chain issues and capacity strains will continue to challenge the successful relaunch of market development and touring activities in the arts. As a result, public funding will need to remain flexible, agile, and accessible to the Ontario arts community as it continues to navigate these uncertain market conditions.

Appendix A. Market Development Funding Programs

Nordicity reviewed a total of 125 market development funding programs across Canada in our analysis. These programs are listed below:

Region	Funder	Program(s)	
Alberta	Alberta Foundation for the Arts	<ul style="list-style-type: none"> Film and Video Individual Project Funding 	
		<ul style="list-style-type: none"> Arts Presenting Project Funding 	
		<ul style="list-style-type: none"> Dance Individual Project Funding 	
		<ul style="list-style-type: none"> Indigenous Arts Individual Project Funding 	
		<ul style="list-style-type: none"> Literary Individual Project Funding 	
		<ul style="list-style-type: none"> Theatre Individual Project Funding 	
		<ul style="list-style-type: none"> Visual Arts and New Media Individual Project Funding 	
	Alberta Government	<ul style="list-style-type: none"> Alberta Culture Days 	
	Edmonton Art Council	<ul style="list-style-type: none"> Edmonton Art Council – Arts and Festival Organizations 	
Ontario	Ontario Creates	<ul style="list-style-type: none"> Ontario Music Investment Fund – Music Industry Initiatives 	
		<ul style="list-style-type: none"> Ontario Music Investment Fund – Music Creation 	
		<ul style="list-style-type: none"> Interactive Digital Media (IDM) Fund – Global Market Development 	
		<ul style="list-style-type: none"> Global Market Development Fund – Book 	
		<ul style="list-style-type: none"> Global Market Development Fund - Film & Television 	
		Toronto Alliance for the Performing Arts	<ul style="list-style-type: none"> Travel, Retreat, and Initiatives Program
	Toronto Arts Council	<ul style="list-style-type: none"> Visual and Media Arts Projects 	
		<ul style="list-style-type: none"> Theatre Projects 	
		<ul style="list-style-type: none"> Music Projects 	
		<ul style="list-style-type: none"> Literary Projects 	
		<ul style="list-style-type: none"> Indigenous Arts Projects 	
		<ul style="list-style-type: none"> Dance Projects 	
		Kingston Arts Council	<ul style="list-style-type: none"> Project Grant
British Columbia (BC)	BC Arts Council	<ul style="list-style-type: none"> Professional Development 	
		<ul style="list-style-type: none"> Project Assistance: Visual Arts Organizations 	

Region	Funder	Program(s)			
British Columbia		<ul style="list-style-type: none"> Project Assistance: Professional Arts Festivals Project Assistance: Museums and Indigenous Cultural Centres 			
		BC Arts Council	<ul style="list-style-type: none"> Arts Impact Grant 		
	Creative BC		<ul style="list-style-type: none"> International Industry Initiatives Domestic Industry Initiatives Passport to Markets Market Expansion Fund (Books) Industry Catalyst Music Industry Initiatives Record In BC Career Development Program Live Music Program Music Company Program 		
			Music BC	<ul style="list-style-type: none"> Domestic and International Travel Grants 	
			BC Touring Council	<ul style="list-style-type: none"> Warming Up The Act Funding New Performance Hubs 	
			Saskatchewan	Conseil culturel Fransaskois	<ul style="list-style-type: none"> Programme d'aide aux artistes (PAA)
				SK Arts	<ul style="list-style-type: none"> Independent Artist Indigenous Peoples Art & Artists
			Manitoba	Manitoba Arts Council	<ul style="list-style-type: none"> Tour Program Present Program Travel/Professional Development
					Manitoba Film and Music
	Quebec	SODEC	<ul style="list-style-type: none"> Aide temporaire aux lieux de diffusion Aide temporaire à la représentation de spectacles de musique et de variétés Programme d'aide à la promotion et à la diffusion (Cinéma) Soutien au marché de l'art 		

Region	Funder	Program(s)	
		<ul style="list-style-type: none"> Aide aux salons du livre 	
		<ul style="list-style-type: none"> Sodexport - Aide à l'exportation et au rayonnement culturel - Volet 1 Développement stratégique des entreprises à l'étranger 	
		<ul style="list-style-type: none"> Sodexport - Aide à l'exportation et au rayonnement culturel - Volet 2.1 Soutien aux occasions d'affaires et à la promotion à l'étranger 	
		<ul style="list-style-type: none"> Sodexport - Aide à l'exportation et au rayonnement culturel - Volet 2.2 Soutien à la tournée de spectacle de musique et de variétés hors Québec 	
		<ul style="list-style-type: none"> Sodexport - Aide à l'exportation et au rayonnement culturel - Volet 2.3 Festivals et distinctions (Cinéma et télévision) 	
		<ul style="list-style-type: none"> Sodexport - Aide à l'exportation et au rayonnement culturel - Volet 2.4 Soutien à la promotion du cinéma québécois en territoire étranger (Cinéma et télévision) 	
		<ul style="list-style-type: none"> Sodexport - Aide à l'exportation et au rayonnement culturel - Volet 2.6 Soutien à l'exportation – marché de l'art (Métiers d'art et marché de l'art) 	
		<ul style="list-style-type: none"> Sodexport - Aide à l'exportation et au rayonnement culturel - Volet 3 Présence collective dans les marchés et foires, et autres activités d'exportation 	
		CALQ	<ul style="list-style-type: none"> Arts and Literature in the Eastern Townships – Territorial Partnership Travel Public Presentation Inuit and First Nations Arts - Revitalization, Creation and Transmission Circulation of Works Within Quebec Circulation of Works Outside Quebec Inuit and First Nations Arts - Microgrants
		SQRC (Quebec Secretariat for Canadian Relations)	<ul style="list-style-type: none"> Soutien aux événements en francophonie canadienne
Prince Edward Island (PEI)	Innovation PEI	<ul style="list-style-type: none"> PEI Arts Grants Funding 	

Region	Funder	Program(s)
New Brunswick	Arts NB	<ul style="list-style-type: none"> ▪ Career Development
	Government of New Brunswick Department of Tourism, Heritage and Culture (administered through MusicNB)	<ul style="list-style-type: none"> ▪ Music Industry Development
	Government of New Brunswick Department of Tourism, Heritage and Culture	<ul style="list-style-type: none"> ▪ Touring and Presenting ▪ Strategic Initiatives Fund ▪ Literary Promotion Grant ▪ Strategic Initiatives Fund
Nova Scotia	Arts Nova Scotia	<ul style="list-style-type: none"> ▪ Grants to Individuals ▪ Grants to Organizations
	Government of Nova Scotia	<ul style="list-style-type: none"> ▪ Creative Industries Fund
Newfoundland and Labrador	Arts NL	<ul style="list-style-type: none"> ▪ Professional Project Grants Program ▪ Professional Artists' Travel Fund ▪ School Touring Program
	Government of Newfoundland and Labrador	<ul style="list-style-type: none"> ▪ Cultural Economic Development Program - Arts Component ▪ Cultural Economic Development Program - Publishers Assistance
Yukon	Government of Yukon	<ul style="list-style-type: none"> ▪ Touring Artist Fund (TAF) ▪ Express Micro-Grant
North West Territories	Government of Northwest Territories	<ul style="list-style-type: none"> ▪ Arts Council Grants ▪ Business Intelligence and Networking (SEED)
Canada (Federal)	Radio Starmaker	<ul style="list-style-type: none"> ▪ International Touring ▪ Domestic Touring
	Musicaction	<ul style="list-style-type: none"> ▪ Mesure de soutien aux artistes parents ▪ Promotion collective internationale ▪ Promotion collective nationale ▪ Programmation des artistes canadiens et vitrines musicales - Vitrines musicales Volet 4 - Captation de spectacle ▪ Music Showcases Component 3 – International Showcase and Tour

Region	Funder	Program(s)
		<ul style="list-style-type: none"> ▪ Programmation des artistes canadiens et vitrines musicales - Vitrines musicales Volet 2 - Tournée nationale
		<ul style="list-style-type: none"> ▪ Programming of Canadian artists and musical showcases - Musical showcases Part 1 - National Showcase
		<ul style="list-style-type: none"> ▪ International Event
		<ul style="list-style-type: none"> ▪ Programmation des artistes canadiens et vitrines musicales - Événement au Canada - Volet 2 – Fonds de réouverture
		<ul style="list-style-type: none"> ▪ Event in Canada
		<ul style="list-style-type: none"> ▪ International Commercialization – Career Development in a Target Market
		<ul style="list-style-type: none"> ▪ International Commercialization Stream 1 – Exploring a Target Market
		<ul style="list-style-type: none"> ▪ National Marketing Component 2 – Scenic Activities
		<ul style="list-style-type: none"> ▪ Production and promotion of titles
	Factor	<ul style="list-style-type: none"> ▪ Support to Music Venues and Concert Promoters
		<ul style="list-style-type: none"> ▪ Collective Initiatives
		<ul style="list-style-type: none"> ▪ Marketing and Promotion for Non-FACTOR-Funded Sound Recordings
		<ul style="list-style-type: none"> ▪ Live Performance
		<ul style="list-style-type: none"> ▪ Juried Sound Recording
		<ul style="list-style-type: none"> ▪ Comprehensive Music Company
	Canada Council	<ul style="list-style-type: none"> ▪ Comprehensive Artist
		<ul style="list-style-type: none"> ▪ Arts Across Canada - Travel
		<ul style="list-style-type: none"> ▪ Arts Across Canada - Representation and Promotion
<ul style="list-style-type: none"> ▪ Arts Across Canada - Circulation and Touring 		
<ul style="list-style-type: none"> ▪ Arts Across Canada - Foreign Artist Tours 		
<ul style="list-style-type: none"> ▪ Arts Across Canada - Arts Festivals and Presenters 		
<ul style="list-style-type: none"> ▪ Arts Abroad - Travel 		
<ul style="list-style-type: none"> ▪ Arts Abroad - Representation and Promotion 		
		<ul style="list-style-type: none"> ▪ Arts Abroad - Circulation and touring
		<ul style="list-style-type: none"> ▪ Canada Arts Presentation Fund (CAPF)

Region	Funder	Program(s)
	Department of Canadian Heritage	<ul style="list-style-type: none">Canada Performing Arts Workers Resilience Fund (CPAWRF)
	Livres Canada Books	<ul style="list-style-type: none">Foreign Rights Marketing Assistance Program (FRMAP)