

***A Profile of Art Galleries in Ontario
Phase One: A Statistical Profile
Based on the 2003 OAAG Data Exchange***



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A STATISTICAL PROFILE OF ART GALLERIES IN ONTARIO

BASED ON THE 2003 OAAG DATA EXCHANGE

Thanks to the participation of galleries across Ontario and the hard work of OAAG staff, this report summarizes the submissions of 39 OAAG members reporting to the 2003 Data Exchange. It should be noted that not all of the galleries completed the whole survey.

Twenty-one galleries reported full data in both 1993 and 2003, providing a solid basis for historical comparisons.

The data in this report relate to galleries' fiscal years ending before September 30, 2003. Those on a calendar basis reported data for 2002 and those not on a calendar basis reported for 2002/03. The timing of this data predates the major impacts of the onset of Severe Acute Respiratory Syndrome in Toronto in the spring and summer of 2003 (and beyond).

The 39 galleries reporting in 2003 are:

- Agnes Etherington Art Centre
- Art Gallery of Algoma
- Art Gallery of Bancroft
- Art Gallery of Hamilton
- Art Gallery of Mississauga
- Art Gallery of Northumberland
- Art Gallery of Ontario
- Art Gallery of Peel
- Art Gallery of Peterborough
- Art Gallery of Sudbury
- Art Gallery of Windsor
- Belleville Public Library and Art Gallery
- Blackwood Gallery, UTM
- Burlington Art Centre
- Campus Gallery (with MacLaren Art Centre)
- Carleton University Art Gallery
- Gallery Lambton
- Government of Ontario Art Collection
- Grimsby Public Art Gallery
- Justina M. Barnicke Gallery, Hart House
- Latcham Gallery
- Lindsay Gallery

- Market Gallery
- McIntosh Gallery
- McMichael Canadian Art Collection
- Mercer Union
- Museum London
- National Gallery of Canada (including Canadian Museum of Contemporary Photography)
- Ottawa Art Gallery
- Robert McLaughlin Gallery
- St. Thomas-Elgin Public Art Centre
- Temiskaming Art Gallery
- Textile Museum of Canada
- The Visual Arts Centre of Clarington
- Thunder Bay Art Gallery
- Tom Thomson Memorial Art Gallery
- Toronto Sculpture Garden
- University of Waterloo Art Gallery
- Woodstock Art Gallery

The 39 galleries are located in 29 municipalities in all parts of the province. Based on 2001 census data, the total population of these communities was nearly 7 million in 2001 (6,953,123).

Communities range in size from Bancroft (population 4,089) to Toronto (population 2,481,494). In geographic terms, galleries reported from Thunder Bay, Sudbury, Temiskaming Shores, Kingston, Lindsay, Cobourg, Vaughan, Hamilton and Windsor.

In four communities, multiple galleries reported to the Data Exchange (7 in Toronto, 3 in Ottawa, 2 in Mississauga, and 2 in London).

Section 1: Gallery Operating Structure

As shown in Table 1:

- 16 of the 39 galleries are municipal galleries;
- 7 are university galleries;
- 6 are provincially-established galleries;
- 2 are nationally-established galleries;
- 1 is an artist-run centre; and
- 7 are other types of organizations.

Table 1: Operating status of Data Exchange galleries

Operating status	Gallery	Note if other
Artist-run centre	Mercer Union	
Municipal	Art Gallery of Algoma	
Municipal	Art Gallery of Hamilton	
Municipal	Art Gallery of Mississauga	
Municipal	Art Gallery of Peel	
Municipal	Art Gallery of Sudbury	
Municipal	Art Gallery of Windsor	
Municipal	Burlington Art Centre	
Municipal	Gallery Lambton	
Municipal	Grimsby Public Art Gallery	
Municipal	Lindsay Gallery	
Municipal	Market Gallery	
Municipal	Ottawa Art Gallery	
Municipal	St. Thomas-Elgin Public Art Centre	
Municipal	The Visual Arts Centre of Clarington	
Municipal	Tom Thomson Memorial Art Gallery	
Municipal	Woodstock Art Gallery	
National	National Gallery of Canada (incl. Canadian Museum of Contemporary Photography)	
National	Textile Museum of Canada	
Other	Art Gallery of Bancroft	Non-Profit Public Gallery administered by volunteers
Other	Art Gallery of Northumberland	Not-for-profit charitable organization
Other	Art Gallery of Peterborough	Board and municipal shared
Other	Belleville Public Library and Art Gallery	A department of the public library.
Other	Temiskaming Art Gallery	incorporation not-for-profit
Other	Thunder Bay Art Gallery	Public art gallery
Other	Toronto Sculpture Garden	Private foundation operating in City park
Provincial	Art Gallery of Ontario	
Provincial	Government of Ontario Art Collection	
Provincial	Latcham Gallery	
Provincial	McMichael Canadian Art Collection	
Provincial	Museum London	
Provincial	Robert McLaughlin Gallery	
University	Agnes Etherington Art Centre	
University	Blackwood Gallery, UTM	
University	Campus Gallery	
University	Carleton University Art Gallery	
University	Justina M. Barnicke Gallery, Hart House	
University	McIntosh Gallery	
University	University of Waterloo Art Gallery	

Nineteen of the galleries are independent organizations, and twelve are institutional departments. Three are subsidiaries of universities, while five reported an organizational status of “other” (including “Crown Corporation”, “Agency of the Ministry of Culture”, and reporting through a provincial government Ministry).

The majority of the galleries are governed by a Board of Directors or Board of Trustees (24 galleries), while nine are governed by an Advisory Committee. Six reported another governance structure, including a standing committee of the university’s board, “Board of Management (department of municipality)” and “city council”.

Most of the galleries function on a calendar-based fiscal year (21 galleries), while eight have a March 31st fiscal year-end, six an April 30th year-end, and two a May 31st year-end.

Thirty-five of the galleries reported incorporation dates, which range from 1842 to 1997:

- three were incorporated in the 19th century, including the Agnes Etherington Art Centre (1842, the date of establishment of Queen’s University), Gallery Lambton (1849) and the McIntosh Gallery (1878);
- two galleries were incorporated in the 1910s;
- two in the 1940s;
- eight in the 1960s (including three in Canada’s centennial year);
- 13 in the 1970s (including three in 1974, three in 1975 and four in 1979);
- two in the 1980s; and
- five in the 1990s (including the Art Gallery of Sudbury in 1997).

Note that these are incorporation dates, not necessarily the years in which the galleries were established.

Thirty-four of the galleries reported having charitable status, and 33 reported a website address.

Section 2: Director's section

Directors of the 39 galleries were asked to respond to a series of questions about their communities served, their changes over the past 10 years, their successes and their challenges. The directors were asked: "What do you consider to be the primary geographic community served by your gallery? (for example, name of municipal or regional area)"

- 33 indicated that their local area was their primary geographic community served;
- 3 noted Canada;
- 2 indicated their university setting;
- 1 mentioned the province of Ontario; and
- 1 mentioned a broad geographic region ("southwestern Ontario").

In response to the question "What other geographic communities does your gallery serve?", a large majority of the directors indicated a broad region, such as "Northwest Ontario", "Golden Horseshoe" or "Niagara Peninsula". Five directors indicated Canada, four mentioned Ontario, and four others indicated international areas. One director indicated that their local area was another geographic community served, having mentioned Canada as the primary geographic community served. Another director indicated that visitors to their area are an important community served. Finally, one director noted that multicultural communities are an important community served by their gallery.

The gallery directors were asked: "In the past 10 years, have there been any significant changes in your gallery in the following areas:

- revenues;
- expenditures;
- staffing;
- facilities;
- exhibitions;
- publications;
- educational activities;
- community activities;
- marketing; and
- ability to keep up with technology."

The directors were given the opportunity to choose "increased", "decreased" or "no change" ("improved", "deteriorated" or "no change" in the categories of facilities and ability to keep up with technology).

As a group, the directors' responses show that:

- **Expenditures** increased almost across the board. Indeed, 31 of the 39 galleries reported that expenditures had increased over the previous 10 years. All other galleries, except one, reported that there was no change in their expenditures.
- **Community activities** also increased in a large number of galleries (31). All other galleries, except one, reported that there was no change in their community activities.
- **Ability to keep up with technology** improved in 30 of the 39 galleries and deteriorated in four galleries. The other five galleries saw no change in their ability to keep up with technology.
- **Educational activities** increased in 29 galleries, decreased in one gallery, and experienced no change in nine galleries.
- **Marketing** increased in 28 of the 39 galleries, decreased in four galleries, and did not change in seven galleries.
- **Revenues** increased in 28 galleries, decreased in eight galleries, and stayed the same in five galleries.
- **Facilities** improved in 24 galleries and deteriorated in five galleries. Nine galleries saw no change in their facilities. One gallery director indicated that their facilities both improved and deteriorated over the past 10 years.
- **Publications** increased in 23 of the 39 galleries, decreased in nine galleries, and experienced no change in seven galleries.
- **Exhibitions** increased in 21 galleries, decreased in five galleries, and did not change in 13 galleries.
- The most mixed result concerns **staffing**, with 15 galleries reporting an increase and 13 reporting a decrease. Ten galleries experienced no change in staffing, while one gallery reported that their staffing had both increased and decreased.

Successes

Gallery directors were asked: "During your tenure as Director, what would you identify as your gallery's most significant successes and challenges?" Thirty-eight galleries reported their successes and challenges.

Over 150 successes were listed by gallery directors. These responses were categorized by the project's researchers the key words or phrases used by the directors.

The successes were grouped into the following categories and are ranked by the number of gallery directors stating a response:

- community partnerships and outreach activities (19 galleries);
- revenue generation and/or overall financial health (19);
- exhibitions (14);
- educational programming (13);

- collection development and use (12);
- profile (11);
- physical plant and facilities (11);
- human resources (7);
- strategic planning (6);
- research and publications (6);
- board governance (5);
- marketing (4);
- attendance (4); and
- other responses.

Some examples of directors' comments in each of these categories are provided below.

Community partnerships and outreach activities

Community partnerships and outreach activities were cited as successes by 19 gallery directors. Innovative partnerships were highlighted in developing festivals, as was the case with the Art Gallery of Algoma (Shadow of the Mind Film Festival and the International Drum Festival). Inter-gallery cooperation was also noted by some directors, including one who stated that “partnerships have meant we are able to publish, on every exhibition, more substantial publications.”

Other galleries noted their role in urban development. The Burlington Art Centre noted that the gallery has achieved important community integration and is now “perceived to play an important role in waterfront and downtown development, building healthy community, economic development, tourism, [and] branding.”

Some examples of community outreach programs are:

- the establishment of a public art program and a municipal art in public spaces committee;
- a program designed to promote volunteerism in youth; and
- a community dialogue about youth violence facilitated by the art gallery.

Revenue generation or overall financial health

Nineteen gallery representatives noted success in revenue generation or overall financial health. Successes in this category include:

- “increased individual/corporate donations”;
- “increased grant success”;
- “establishment and stabilizing [of] University funding and staffing”;
- “increased sales, especially in our gift shop”; and
- the initiation of “show sponsorship” and a “memorial donation program”;

- “decreasing deficit”; and
- “augmenting...financial stability.”

The financial situation of galleries is further explored in Section 12, Operating Finances.

Exhibitions

Exhibitions were mentioned as a success by 14 gallery directors. While some gallery directors named particular exhibitions as a success (for instance, “Carr, O’Keeffe, Kahlo: Places of Their Own” and “Jack Bush – Hymn to the Sun”), others noted “enhanced quality and quantity of exhibitions”, “more diverse and balanced exhibition programming” and “more diversity in artists and media in exhibitions”. Other successes highlighted by gallery directors include “an articulated exhibition programme” and a “greater number of touring exhibitions.”

Educational programming

Educational programming was reported by 13 galleries. Many directors mentioned increased quantity and improved quality as a success. Others noted educational programming successes such as:

- the creation of a fund that is used to provide art classes for underprivileged families;
- a new school program that combines web searching with a real visit to the gallery;
- the creation of a fund to lessen the cost of bussing for schools visiting the gallery; and
- a volunteer outreach program that brings media production to youth in lower-income neighbourhoods.

Collection development and use

Twelve gallery directors noted the active development and growth of their collection as a success. This development includes “actively purchasing acquisitions for the contemporary collection” and “building a permanent collection and relationships with donors.” Statistical information on collections appears in Section 8 of this report.

Profile

Increased profile was mentioned by 11 galleries. Six gallery directors felt that the increase in visibility of the gallery in its own community was a success, while three gallery directors highlighted an increase in the national and international profile of their organizations. One gallery director noted an “increase in institutional profile with peer organizations.”

Physical plant and facilities

Eleven galleries cited improved facilities as a success. Renovations and new facilities have allowed galleries to create “more valuable exhibition areas”, “additional storage space” and “increased collection storage and study space.” Other improvements to galleries, such as better directional signage and more functional areas, have made galleries more accessible.

Human resources

Seven directors noted human resource successes, including investment in professional development and the “training of emerging museum professionals”. One director noted that hiring a staff person “to address development and business planning has greatly increased revenues and our ability to access new funding streams.”

Strategic planning

The development and implementation of a strategic plan was cited as a success by six galleries. As one gallery representative put it, strategic planning “helps with increased challenges and reduced resources.” Another noted that “after a few false starts, the gallery embarked on a strategic planning session in 2000 and successfully implemented such a plan. The plan was revisited in 2003 and is being updated to reflect the current direction the Gallery is undertaking.”

Research and publications

Six galleries mentioned publications and research as a success. Accomplishments cited by directors include an increase in the “quality and number of publications produced”, a “commitment to scholarship”, and general “research and publication achievements.”

Board governance

Improved board governance was highlighted as a success by five gallery directors. As one director reported, “In 1991 the board size was 10 and was not as diverse as it should have been. By-laws were very skimpy. The board size was increased to 12 and the by-laws rewritten to acceptable standards.” Another gallery took advantage of a capacity-building program and “developed skill sets profiles [for board members] that support our strategic goals”. The gallery then ran professional interviews, resulting in a board that elevated the stature of the gallery in community and increased expertise in required areas. Other comments reflecting achievement in gallery board governance include “increased community representation on advisory committee” and the creation of an “independent board allowing for autonomous decision making”.

Marketing

Four galleries cited marketing successes, such as new marketing and communications strategies, website profile and website development. One gallery improved its communication through a “bimonthly newsletters, street level kiosk, new gallery signage, [and] a regular notice column in the local paper.”

Attendance

Increased attendance was listed as a separate response to the success question by four galleries. It was also mentioned as a by-product of other successes such as increased gallery space, improved educational programs and enhanced exhibitions.

Other responses

Some successes that could not be categorized elsewhere include:

- “improved quality of all programming”;
- “expanding the program parameters from largely local to local, national and international”;
- “establishing a new gallery and every aspect of its programme”;
- “secured 5+5 year lease in library branch – stable environment with spin-off visitation by library patrons”; and
- “transfer to new programme area of [the Ministry].”

Challenges

By far, the most pressing challenge for Ontario galleries is their funding. Thirty-five of the 38 galleries indicated that funding is a challenge.

The challenges were grouped in the following categories, ranked by the number of gallery directors stating a response:

- funding (35 galleries);
- facilities (14);
- audiences and attendance (10);
- human resources (7);
- strategic planning and policy development (7);
- board and volunteer development (6);
- community relations (4);
- profile and marketing (3); and
- other responses.

Funding

Funding challenges relate to overall sustainability and general financial health, government funding, competition for donations, corporate support and university support.

➤ Sustainability and general financial health

Sustainability and general financial health was mentioned by 17 gallery directors, including:

- “insufficient operating and capital funding”;
- “need for improved funding to increase hours”;
- “lack of financial resources to improve staffing and other programmes”;
- “economic downturn – reduced sales and visitation”;
- “gap between organizational ambition and financial resources”;
- funding cuts “make future programming, staffing, hours of operation, etc. a concern”;
- the need for acquisition funds; and
- the need to develop an endowment fund.

➤ Government funding

The majority of comments regarding government funding challenges related to decreased provincial and municipal funding over the past 10 years. Specific comments include:

- “decreased provincial funding – was \$140K on a \$900K budget, now is \$37.7K on an operating budget of \$1,778K”;
- “significant decrease in provincial grants”;
- “reduced provincial funding”;
- “financial instability – most notably, the lack of funding from the Ontario Arts Council and other governmental agencies”;
- “fundraising continues to be a challenge with city cutbacks”;
- “need for municipal operating funding beyond rent free spaces”; and
- “inadequate municipal funding.”

Directors of galleries affiliated with other institutions or governments noted limitations in their fundraising ability as they are not recognized as separate entities by a variety of foundations and funding agencies.

➤ Competition for donations

Competition for donations was mentioned by 11 gallery directors. One director stated that there are “growing needs from other non-profits in the community, with culture needs perceived as low compared to health, social services and sports”.

➤ Corporate support

Five gallery directors specifically mentioned corporate support as a funding challenge. One director stated that there is “increased competition for decreased corporate dollars.” A gallery located in a smaller community noted that “some closings of businesses in our community [have] necessitated finding other corporate sponsors or donors.”

➤ University support

Directors of four university-affiliated galleries noted that they are not able to fundraise for their own needs, but must go through the university’s development department, where fundraising for the gallery’s needs is often subordinate to broader university campaigns. Other comments included “miserable core funding” and “stagnant university support.”

Facilities

Facility challenges were mentioned by 14 galleries, second only to funding concerns. One director indicated that the lack of exhibition space inhibited their gallery’s ability to “mount important exhibitions [and] make use of a strong permanent collection.” Other facilities challenges include a lack of climate controlled space, limited storage and shipping dock access, and an increase in hydro costs. The directors of two university-affiliated galleries noted challenges in regards to their gallery’s physical location and its visibility in the wider community.

Attendance

Ten galleries mentioned attendance challenges. Three galleries noted that “reaching diverse communities” was a challenge. Another director pointed out that audience building is “a constant struggle especially with fewer staff and dollars.” Demographic changes are a concern for some galleries in small communities. One director noted that “many professionals and youth [are] leaving the city for better opportunities.” Decreases in tourism attendance due to 9/11 and SARS have also hurt a number of galleries.

Human resources

Challenges related to human resources were mentioned by seven galleries. Staff shortages were the main concern. One director noted the gallery’s “inability to build more extensive public programme due to small staff”. Another cited the “increasing workload on staff [who are] doing 25%+ more with the same number of people”. Other comments in the area relate to retaining good staff in rural areas or in the presence of better-paying job opportunities (such as the federal government in Ottawa).

Planning and policies

Challenges related to planning and policies were mentioned by seven galleries. Some comments related to strategic planning processes:

- “agreement around vision/alignment – at all levels of government, trustees, staff and volunteers”; and
- “strategic planning process to try and establish a more effective governance structure.”

Other comments relate to specific policy issues such as the refocusing of a collections policy through a “challenging public process.”

Board and volunteer development

Related to human resources, six gallery directors felt that challenges exist in board and volunteer development. One director noted that it is “more difficult to find people who are able to give a lot of time and energy to fundraising projects. [Our] dedicated older volunteer force [is] dwindling – newer members [do not have] the same dedication and willingness to give of their time.” Another director suggested that there is a “changing face of volunteerism. Volunteers have higher expectations of benefits they receive, are less able to commit to 12 month roles” and prefer “shorter project based volunteering”.

Community relations

Four galleries mentioned community relations as a challenge, including:

- repairing previously damaged relationships with other community organizations;
- lack of support from academic colleagues for a university-affiliated gallery;
- competition with a municipality in terms of art exhibitions and collections; and
- competition with other entertainment options for audience interest.

Profile and marketing

Profile and marketing challenges were mentioned by three galleries. Insufficient human and financial resources were cited as a limit to galleries’ ability to market themselves inside and outside their communities.

Other challenges

Some challenges that could not be categorized elsewhere include creating “a distinct and purposeful presence with contemporary and educational programs that will benefit from their unique proximity to historical collections” and “limited local cultural organizations”.

Section 3: Artistic program

The 37 galleries reporting data on their artistic program indicated that they presented 555 exhibitions in 2002/03, for an average of 15 per gallery. Of these 555 exhibitions:

- 434 were produced entirely in-house;
- 53 were collaborations co-organized with other institutions;
- 3 were produced and circulated by the National Gallery of Canada;
- 41 were produced and circulated by Ontario galleries other than the NGC;
- 23 were produced and circulated by other galleries in Canada;
- 2 were produced and circulated by institutions in the United States; and
- 5 were produced and circulated by galleries outside Canada and the United States.

Many more exhibitions were temporary (428) than drawn from galleries' permanent collections (138).

Seventy exhibitions were produced by responding galleries and circulated to other locations (not necessarily in Ontario). The most active circulating galleries were the National Gallery (32 exhibitions circulated), Museum London (5), the Tom Thomson Gallery (5), and the Art Gallery of Hamilton (4).

Almost one-thousand artists (995) were paid fees by the responding galleries. Twenty-six galleries reported paying 355 visiting artists a per diem.

Direct cash corporate sponsorship was received for 117 exhibitions in 28 galleries.

Thirty-two galleries reported that they devoted exhibitions to local community groups or some level of the school system. Of these 32 galleries:

- 10 had exhibitions devoted to primary schools;
- 20 had exhibitions devoted to secondary schools;
- 11 had exhibitions devoted to post-secondary schools; and
- 12 had exhibitions devoted to artist associations.

In addition, a few galleries reported that they had exhibitions devoted to other community groups, such as local Pride associations, London Homeless Coalition Kids for Kids Africa AIDS Initiative, and the local "politically active community".

Statistics on the changes in exhibitions between 1993 and 2003 are provided in Section 14.

Section 4: Public services

Public days and hours

The most common opening schedule for the 38 galleries reporting their public days are:

- Tuesday through Sunday (14 galleries);
- Monday through Sunday (11 galleries);
- Tuesday through Saturday (7 galleries);
- Wednesday through Sunday (3 galleries);
- Monday through Saturday (2 galleries);
- and Wednesday through Saturday (1 gallery).

This means that, of 38 galleries, 11 are open to the public seven days a week and another 16 are open six days a week.

Overall, the 36 galleries that counted the number of hours that they are open in a year were open for a total of about 71,000 hours in 2002/03, for an average of almost 2,000 hours per gallery. This is an average of 38 hours per week.

Twenty-two galleries reported evening hours that average 6 hours per week. Thursday is the most common day for evening hours (17 galleries), followed by Wednesday (10), Friday (5), Tuesday (5) and Monday (2).

In addition to these public hours, 23 galleries reported that staff work on days that the gallery is closed to the public. Eighteen of these galleries reported Monday while the other 5 reported Monday and Tuesday.

Gallery respondents were asked to select the busiest season(s) in their gallery. Of 37 respondents, 28 indicated fall, 20 spring, 19 summer and 13 winter. (These amounts add up to more than 37 because galleries could select more than one busiest season.)

Admissions policies

Regarding their admissions policies, 20 galleries indicated that they have free admission. Nine have a voluntary charge, while 5 have a mandatory charge. Four other galleries have a mix of admissions policies (three of which include a free option).

The average adult admission fee, for the nine galleries reporting a fee, is just under \$7. The average admission fee is about \$5 for seniors and students.

Statistics on the changes in publications and admissions policies between 1993 and 2003 are provided in Section 14.

Websites

Galleries were asked about the type of content that they make available on their websites. Of the 37 galleries responding to these questions, 34 provide exhibition information, and 29 provide images of artwork. Of these 29 galleries, eight reported that they pay artist fees for posting artwork on their website, while 20 reported that they do not do so. (The other gallery indicated that any fees are negotiated directly with the artist.) In addition, eight galleries provide online exhibitions, six make online publications available, and two make their annual reports available online.

Eleven galleries reported data on the number of visits to their website in 2002/03. These eleven galleries reported a total of 3 million visits in 2002/03, for an average of nearly 270,000 per gallery. (Note that this is much lower than the number of "hits".¹)

Ten galleries reported that images of artwork from their collection are also available through Virtualmuseum.ca. Four galleries reported other locations, including CHIN (Canadian Heritage Information Network). One gallery reported that images of artwork from their collection are available at amico.org.

Publications

Ontario's public galleries have active publishing programs:

- 31 galleries produced at least one exhibition catalogue in 2002/03, or 4.6 per publishing gallery.
- 22 of Ontario's public art galleries reported producing 136 other publications in 2002/03.
- 29 galleries reported producing 117 print newsletters, while 8 galleries produced 76 electronic newsletters in 2002/03.

Professional development and conferences

Twenty galleries indicated that they presented or produced 272 professional development activities in 2002/03, including classes, workshops, and seminars. In addition, 42 conferences were presented or produced by Ontario galleries.

Some specific professional development activities mentioned by the galleries include:

- Artist talks and lectures;
- Community outreach programs;
- Curators' talks;
- Gallery tours & dealing with difficult visitors ("The Tour from Hell");

¹ According to the "Raise your Sites" Internet Dictionary (http://www.raise-your-sites.co.uk/tips_and_glossary.html), a web visit is "the time spent by a visitor whilst logged on to a website whilst requesting various files (accesses), on various pages (page hits). Each time the visitor leaves the site and returns, it is a separate visit." The definition of a web hit from the same dictionary: "In internet terms a hit means a single request from a web browser for a single item from a web server. Consequently, for a web browser to display a page that contains 4 graphics there would be 5 hits: One for the HTML page, and one for each of the four graphics."

- In-service training for educators;
- Master classes; and
- Teen Events.

Section 5: Community reach

Total attendance at the thirty-seven galleries reporting attendance data was over 2.1 million in 2002/03. The National Gallery and the Art Gallery of Ontario together accounted for over one-half of the total attendance figure. The Burlington Art Centre, the McMichael Gallery and Museum London also each had attendance figures that exceeded 100,000.

Table 2 presents the attendance by galleries' operating structure in 2002/03.

Type	Attendance	% of attendance for all 37 galleries	# of galleries
Provincial	848,714	40%	5
National	623,754	29%	2
Municipal	497,852	23%	16
Other	69,786	3%	6
Artist-run centre	12,200	1%	1
Total	2,052,306	100%	37

Statistics on the changes in attendance between 1993 and 2003 are provided in Section 14.

Twenty-six galleries reported paid memberships.² Individual memberships are most common, including students, seniors, artists or other single individuals, totalling 58,000 memberships. Couple, dual, family or other group memberships totalled 6,400, followed by business, sponsor or corporate memberships (600). In addition, 2,000 complimentary memberships of all types were granted by Ontario's public galleries.

Other community activities

Galleries presented over 1,000 community activities, including the use of the gallery for parties or other special events. About 700 of these events generated revenue for the galleries. These community activities include 234 corporate events in 21 galleries, 67 weddings (4 galleries), 65 screenings (7 galleries) and a variety of other special events, including auctions, baby and bridal showers, Bar Mitzvahs, Chamber of Commerce meetings, fundraising events, receptions, retirements, seminars, university events and wine tastings.

² These figures include the number of memberships, not the number of *members* covered by the memberships.

Section 6: Marketing

The Data Exchange questionnaire asked public galleries how many paid advertisements they placed in the most recent year. Table 3 shows that print ads were most common, with 35 galleries placing nearly 1,800 paid print ads, an average of 50 per gallery. Fourteen galleries placed over 600 paid radio ads, while 10 galleries reported paying for 71 email ads. Televised ads were least common, with 3 galleries reporting 41 ads total.

Table 3 also shows that print ads were also the most common form of unpaid community listings, with 33 galleries placing over 2,200 unpaid print ads, an average of 67 per gallery. Twenty-five galleries placed nearly 1,000 unpaid radio ads, while 18 galleries advertised via nearly 800 unpaid email ads. Twenty galleries placed a total of nearly 500 unpaid television ads.

Table 3: Paid and unpaid advertising, 2002/03			
Ad type	Paid	Unpaid	Total
Print	1,759	2,208	3,967
Radio	625	966	1,591
Email	71	784	855
TV	41	485	526
Total	2,496	4,443	6,939

In addition, 33 galleries distribute marketing brochures, 24 galleries distribute posters, and 16 distribute postcards. Other marketing materials used by public galleries include banners, bookmarks, busboards, calendars, faxes, flyers, invitations, newsletters, press releases, public service announcements, and “what’s on” guides.

Section 7: Taxes

Overall, 20 public galleries submitted \$1.1 million in net provincial sales tax (PST). Some public galleries submitted GST to the federal government, while others recovered GST (because their expenses surpass their earned revenues). The 15 galleries reporting their GST recovered \$1.2 million more in GST than they paid to the federal government in 2002/03. Several galleries noted that their GST, PST and payroll amounts are submitted through a central organization, such as a university or municipal government, and are not included in these figures.

Section 8: Collections

The 34 public galleries reporting permanent collections have 180,000 works in their care. The Art Gallery of Ontario and the National Gallery account for 74,000 works, or 41% of the total.

Thirty galleries provided an appraised or estimated value for their permanent collections. These collections were valued at over \$373 million. (The AGO and National Gallery did not report the value of their collections, so the \$373 million figure does not include their large collections.)

Of the 14,800 works added to permanent collections in 2002/03, 14,500 (or 98%) were donated to the galleries. These donated works were valued at over \$130 million. Thirty galleries received donated works during the year.

Nineteen galleries reported a total of \$8.6 million in their acquisition funds, of which \$3.3 million was added in 2002/03. In 2002/03, 21 public galleries purchased a total of 330 works with a total value of \$7.2 million. However, it is one gallery, the National Gallery of Canada, which reported the majority of activity in both areas.

Twenty-six galleries reported on their databases to track their permanent collections. The most common database is Microsoft Access (14 galleries), followed by Microsoft Excel, Filemaker Pro and MultiMimsy (2 galleries each).

Permanent collection insurance totalled almost \$400,000 in 2002/03.

Eight galleries reported that the cost of their insurance for travelling exhibitions totalled over \$500,000. The AGO incurred a large portion of this total cost.

Statistics on the changes in collections between 1993 and 2003 are provided in Section 14.

Section 9: Arts Education and Arts Learning

Table 4 shows that, in 2002/03, 31 public art galleries reported providing 6,100 arts education activities or programs that were produced for, by or with 330,000 young people (under 18). These activities involved the participation of over 500 artists.

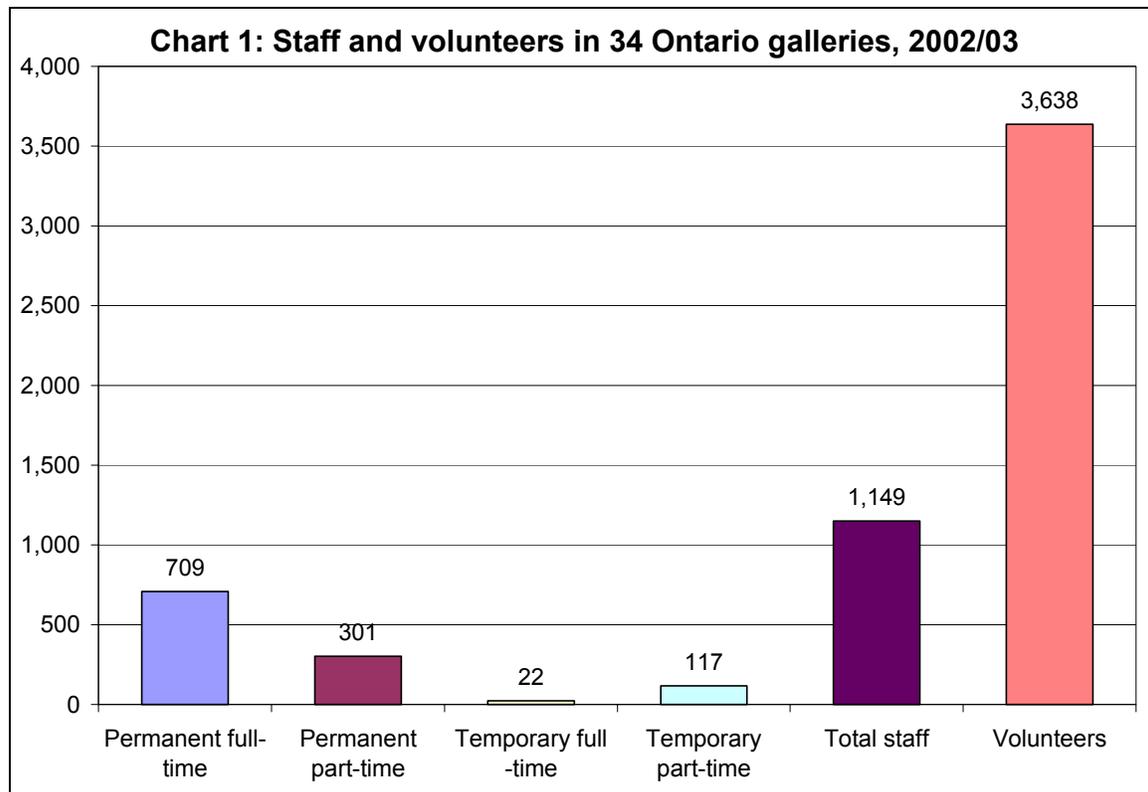
Table 4 shows that 35 galleries reported providing 28,200 arts learning activities (i.e., activities or programs that were produced for, by or with publics of all ages in order to increase public appreciation, knowledge and participation in the arts). These arts learning activities reached 231,000 people and involved 820 artists.

Table 4: Arts education (people under 18) and arts learning (all ages) activities, 2002/03			
Activity	# activities	# people reached	# artists involved
Arts education	6,116	327,433	502
Arts learning	28,196	231,297	822

Section 10: Workforce

Chart 1 shows that, in 2002/03, over 1,100 staff members worked at the 34 galleries reporting in this section of the Data Exchange. These galleries employed 709 permanent full-time staff and 301 permanent part-time staff in 2002/03. In addition, 22 temporary full-time and 117 temporary part-time staff worked in galleries reporting to the Data Exchange.

Over 3,600 volunteers worked with Ontario galleries in 2002/03. This number is more than three times the total staff level at Ontario galleries.



Thirty galleries provided a detailed breakdown of their employment positions. Given that many galleries did not provide a full breakdown, a detailed analysis of employment positions is not possible. However, what follows is a list of the number of galleries and the total permanent full-time staff members in select positions:

- 15 galleries reported 16 permanent full-time CEOs, Executive Directors or Directors (one centre has co-directors);
- 15 galleries reported 15 permanent full-time Director-Curators;
- 1 gallery reported 2 permanent full-time Deputy Directors;
- 6 galleries reported 14 permanent full-time Development/Fundraising Directors or Managers;

- 4 galleries reported 7.5 permanent full-time Marketing/Communications/Public Relations Directors or Managers (the half person being split with another position);
- 5 galleries reported 7 permanent full-time Senior Curators;
- 5 galleries reported 11 permanent full-time Intermediate Curators;
- 2 galleries reported 4 permanent full-time Junior Curators;
- 4 galleries reported 4 permanent full-time Collections Directors/Managers;
- 7 galleries reported 7 permanent full-time Registrars;
- 1 gallery reported 5 permanent full-time Conservators (Tech & Working Level);
- no gallery reported a permanent full-time Conservation Technician;
- 1 gallery reported 1 permanent full-time Archivist;
- 1 gallery reported 1 permanent full-time Librarian.

Twenty-eight galleries estimated the hours worked by their volunteers. The 3,600 volunteers in these 28 galleries worked a total of 244,000 hours in various capacities. This works out to 68 hours per volunteer.

Some volunteer activities reported by the galleries include:

- 23 galleries reported 268 Elected Board and Advisory Committee members;
- 23 galleries reported 156 Appointed Board and Advisory Committee members;
- 4 galleries reported 138 Educators, Education Officers or Interpreters;
- 4 galleries reported 13 volunteer Librarians; and
- 4 galleries reported 5 Volunteer Managers or Coordinators.

Statistics on the changes in staff and volunteers between 1993 and 2003 are provided in Section 14.

Section 11: Capital funding

Nineteen galleries reported information about 24 capital projects for which they received funding in 2002/03. The total funding for these projects in 2002/03 was \$10.6 million, of which:

- \$5.9 million (56%) was raised from non-government sources;
- \$2.6 million (24%) was provided by the federal government;
- \$1.6 million (15%) was provided by municipal governments; and
- \$470,000 (4%) was provided by the provincial government.

In terms of the types of capital projects:

- 5 were gallery building campaigns (total value \$7.7 million);
- 4 involved major equipment acquisitions (\$2.3 million).
- 10 were renovations (total value \$460,000); and
- 5 were other projects (\$170,000).

Four projects underway at the Art Gallery of Ontario and the National Gallery accounted for a large portion of the total capital funding reported.

The financial support for the other 20 projects (total funding of \$2.7 million) was:

- \$1.6 million (59%) from municipal governments;
- \$590,000 (22%) from non-government sources;
- \$260,000 (10%) from the federal government; and
- \$260,000 (10%) from the provincial government.

Section 12: Operating finances

Note: Hill Strategies Research allocated information from the published financial statements of the McMichael Collection and the National Gallery into the operating funding form of the Data Exchange in 2003. All other galleries submitted the Data Exchange form, which exactly matched the Ontario Arts Council's Financial Form.

Thirty-four galleries provided full details about their operating finances in 2002/03. These 34 galleries recorded total revenues of \$109.7 million and total expenditures of \$104.4 million in 2002/03. The resulting calculation of a \$5.3 million "surplus" is a bit misleading, as the National Gallery's art purchases were not entered into the operating expenses section of the Data Exchange. However, the revenues for these purchases were shown in operating revenues. Excluding this amount, the 34 galleries would have a collective deficit, before interfund transfers, of \$1.1 million.

Of the \$109.7 million in total revenues:

- \$69.0 million (63%) was received from government sources;
- \$27.1 million (25%) was earned;
- \$12.5 million (11%) was raised from private-sector sources; and
- \$1.2 million (1%) was from other sources.

Chart 2 depicts this revenue breakdown.

Revenues by budget size

Table 5 summarizes the revenues of the 34 reporting galleries by budget size. As a percentage of total revenues, earned and private revenues vary widely, with the largest galleries earning relatively high percentages of their revenues and raising relatively low percentages of their revenues from private sources. Government funding is relatively similar for four of the five revenue groups. Only those galleries with revenues between \$1.5 and \$3.5 million receive less than one-half of their funding from government sources.

Excluding the National Gallery, the Art Gallery of Ontario and the McMichael Collection, the other 31 galleries have total revenues of \$19.2 million. These 31 galleries (with revenues under \$3.5 million) earn 20% of their revenues, generate 24% from private sources, receive 55% from government, and receive 1% from other revenues.

This breakdown is depicted in Chart 3. Compared with Chart 2, Chart 3 shows that the 31 smaller galleries earn a lower percentage of their revenues, raise a larger percentage of revenues from private sources, and receive a smaller percentage from government sources.

Chart 2: Operating revenues of 34 Ontario art galleries, 2002/03

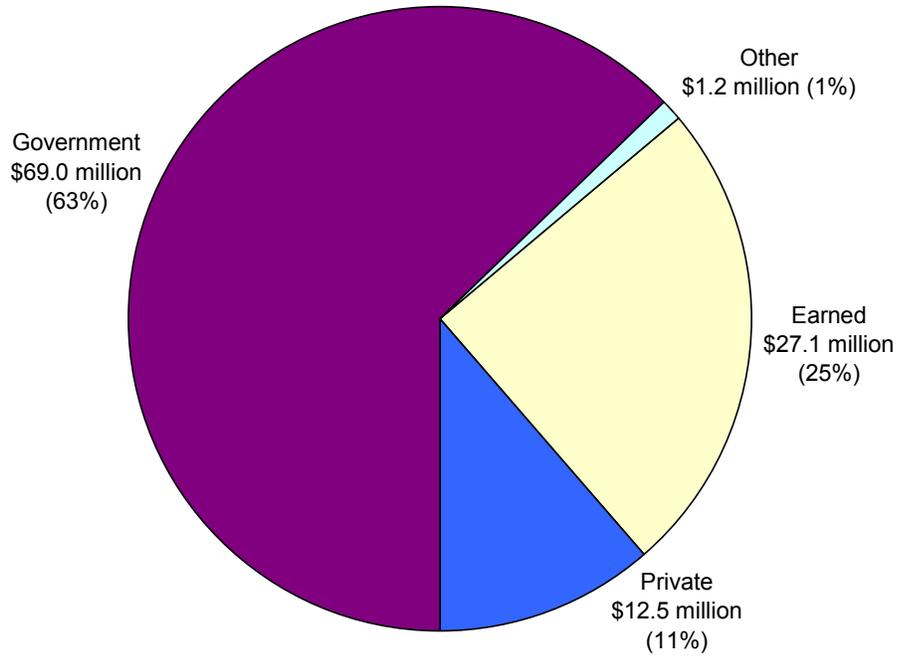
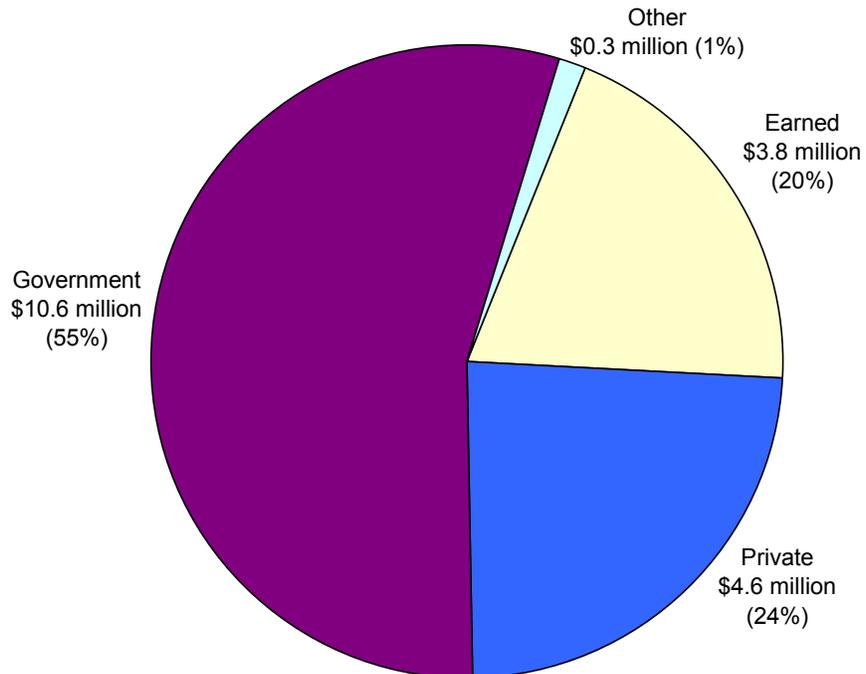


Chart 3: Operating revenues of 31 Ontario art galleries with total revenues under \$3.5 million, 2002/03



Revenue groups	Number of galleries	Earned %	Private %	Government %	Other revenues %
Under \$200k	10	15%	22%	62%	1%
\$200k-\$500k	12	19%	14%	67%	0%
\$500k-\$1.5m	5	15%	24%	60%	1%
\$1.5-\$3.5m	4	23%	28%	46%	2%
Over \$6m	3	26%	9%	65%	1%
All galleries	34	25%	11%	63%	1%
31 galleries with revenues under \$3.5 million	31	20%	24%	55%	1%

Revenues by operating status

Table 6 summarizes the revenues of reporting galleries by operating status. Earned and private revenues vary considerably, with provincial galleries earning the largest percentage of their revenues. National and university galleries earn the lowest percentage of their revenues. Municipal, university and “other” galleries raise the largest percentages from private sector sources. As a percentage of total revenues, government revenues are highest for national galleries, followed by university, “other”, municipal and provincial galleries.

Operating status	Number of galleries	Earned %	Private %	Government %	Other revenues %
Municipal	15	22%	28%	49%	1%
Provincial	6	40%	16%	41%	2%
National	2	13%	3%	84%	0%
University	5	13%	23%	64%	0%
Other	5	18%	23%	57%	2%
All galleries	34	25%	11%	63%	1%

Note: The finances of the lone artist-run centre reporting to the Data Exchange are excluded from the breakdowns in this table, as their revenues cannot be taken to be representative of all artist-run centres.

Government revenues by operating status

Table 7 summarizes the government revenues of reporting galleries by operating status. Among all 34 galleries, the federal government accounts for the largest share of revenues, primarily because of its funding of the largest gallery – the National Gallery of Canada. The Ontario government is the next largest funder, primarily because of its funding of the second and third largest galleries – the Art Gallery of Ontario and the McMichael Collection.

Among all galleries, the Ontario Arts Council accounts for 2% and the Canada Council 1% of total revenues.

On average, municipal galleries receive 31% of their budgets from municipal governments. Similarly, provincial galleries receive an average of 33% from the Ontario government (excluding OAC). National galleries receive an average of 83% from the federal government.

The final row of Table 7 shows that, excluding the National Gallery, the Art Gallery of Ontario and the McMichael Collection, the other 31 galleries receive 7% of their revenues from the Canada Council, 3% from Canadian Heritage and other federal sources, 6% from OAC, 3% from other provincial sources, 30% from municipal governments, and 6% from other government sources.

Table 7: Government revenues by operating status, 2002/03

Operating status	# of galleries	Canada Council %	DCH & other federal %	OAC %	Other Ontario %	Municipal %	Other govt %
Municipal	15	6%	3%	6%	2%	31%	1%
Provincial	6	1%	0%	2%	33%	5%	0%
National	2	0%	83%	0%	0%	0%	0%
University	5	10%	1%	5%	0%	1%	46%
Other	5	8%	2%	11%	2%	33%	0%
All 34 galleries	34	1%	40%	2%	13%	6%	1%
31 galleries with revenues under \$3.5 million	31	7%	3%	6%	3%	30%	6%

Note: The finances of the lone artist-run centre reporting to the Data Exchange are excluded from the breakdowns in this table, as their revenues cannot be taken to be representative of all artist-run centres.

Expenditures

The \$104.4 million in gallery expenditures was spent on artistic costs (\$42.1 million or 40% of total expenditures) and operating costs (\$62.3 million or 60%). It should be noted that categories such as “permanent collection maintenance” are included as operating *not* artistic costs on the financial form. Because of potential reporting inconsistencies, a finer breakdown of expenditures is not provided.

Section 13: Changes in operating finances between 1993 and 2003

Twenty-one galleries reported full financial data in both 1993 and 2003:

- Agnes Etherington Art Centre
- Art Gallery of Algoma
- Art Gallery of Hamilton
- Art Gallery of Mississauga
- Art Gallery of Ontario
- Art Gallery of Peel
- Art Gallery of Peterborough
- Art Gallery of Windsor
- Burlington Art Centre
- Gallery Lambton
- Grimsby Public Art Gallery
- Justina M. Barnicke Gallery, Hart House
- Lindsay Gallery
- McIntosh Gallery
- McMichael Canadian Art Collection
- Museum London
- National Gallery of Canada
- Ottawa Art Gallery
- Robert McLaughlin Gallery
- Thunder Bay Art Gallery
- Tom Thomson Memorial Art Gallery

The 21 galleries in this “historical group” had total revenues of \$107 million in 2002/03, or 97% of the total revenues of all 34 galleries reporting to the 2003 Data Exchange. The historical group had exactly the same operating revenue structure in 2002/03 as the full group of 34 galleries:

- earned revenues: 25% of total revenues;
- private: 11%;
- government: 63%; and
- other revenues: 1%.

As Table 8 shows, for the historical group of galleries:

- Total revenues increased from \$62 million to \$107 million between 1993 and 2003, a 71% increase.
- Earned revenues increased from \$7.2 million to \$27 million. This is nearly a fourfold increase in earned revenues.
- Private sector revenues increased from \$2.4 million to \$12 million. This is nearly a fivefold increase.
- Government revenues increased from \$53 million to \$67 million, a 27% increase.
- Galleries were not asked about other revenues in 1993, so a change figure cannot be determined.

Table 8: Changes in gallery operating revenues between 1993 and 2003				
	1993	2003	Change (\$)	Change (%)
Earned	\$7 million	\$27 million	\$20 million	273%
Private	\$2 million	\$12 million	\$9 million	398%
Government	\$53 million	\$67 million	\$14 million	27%
Other	n/a	\$1 million	n/a	n/a
Total	\$62 million	\$107 million	\$44 million	71%

Put differently:

- For every \$1 in total revenues in 1993, the galleries had \$1.71 in 2003.
- For every \$1 in earned revenues in 1993, the galleries earned \$3.73 in 2003.
- For every \$1 in private revenues in 1993, the galleries raised \$4.98 in 2003.
- For every \$1 in government revenues in 1993, the galleries received \$1.27 in 2003.

Between 1993 and 2003, of the 21 galleries reporting to both years of the Data Exchange:

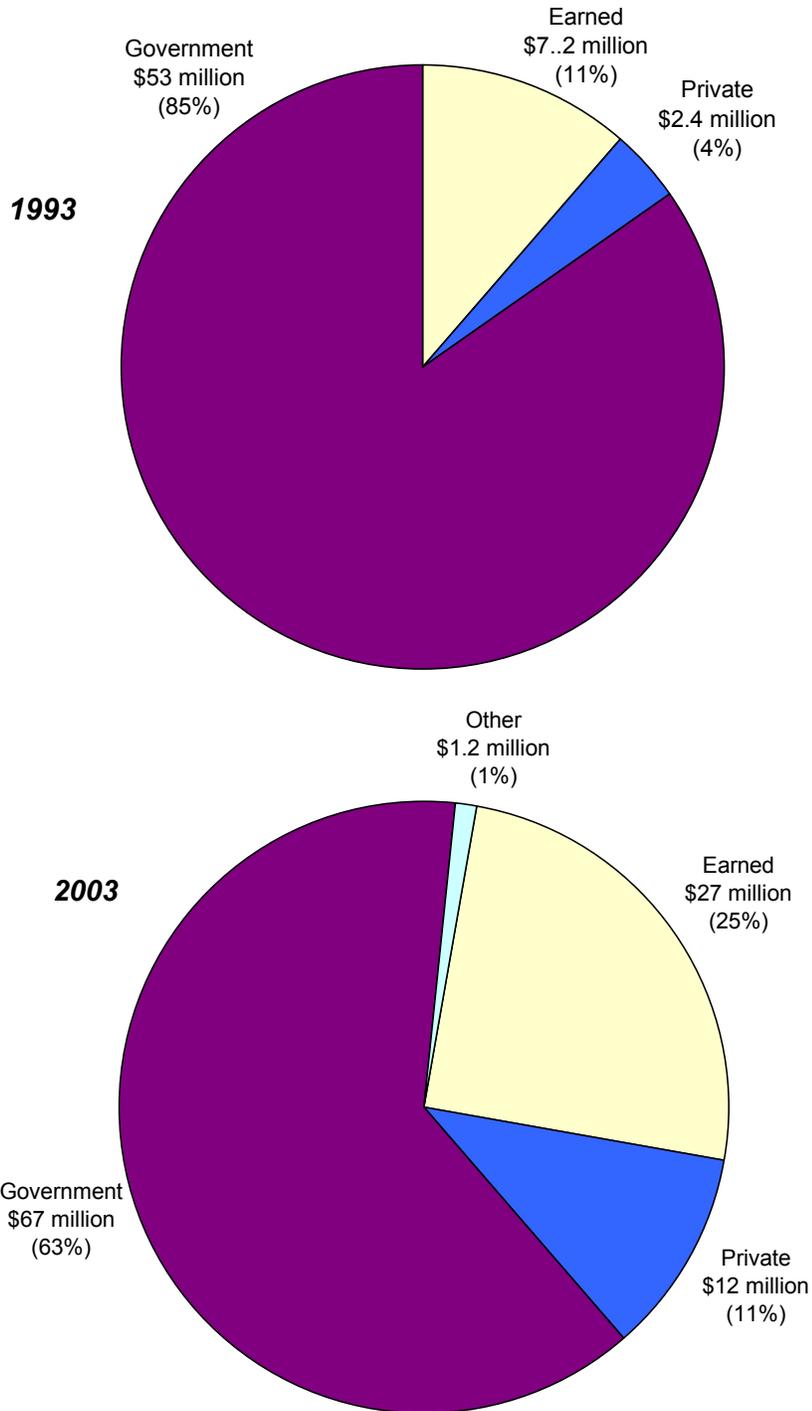
- 19 increased their total revenues, while 2 saw a decrease in total revenues;
- 17 increased their earned revenues, 3 saw a decrease, and 1 saw no change;
- all 21 increased their private sector revenues; and
- 11 saw an increase in their government revenues, while the other 10 saw a decrease in their government revenues.

As a percentage of total revenues:

- Earned revenues increased from 11% in 1993 to 25% in 2003.
- Private sector revenues increased from 4% to 11%.
- Government revenues decreased from 85% to 63%.

Chart 4 depicts these changes in revenue sources.

Chart 4: Revenue sources of 21 Ontario public art galleries, 1993 and 2003



Inflation-adjusted changes

The above figures have not been adjusted for the 20% inflation in Canada between 1993 and 2003. This section provides figures for 2003 that have been adjusted for this change in the Consumer Price Index.³ As Table 9 shows, for the 21 galleries in the historical group:

- Total revenues increased from \$62 million to \$89 million between 1993 and 2003, a 42% increase after adjusting for inflation.
- Earned revenues increased from \$7.2 million to \$22 million. This is over a threefold increase in earned revenues after adjusting for inflation.
- Private sector revenues increased from \$2.4 million to \$10 million. This is a fourfold increase after adjusting for inflation.
- Government revenues increased from \$53 million to \$56 million, a 6% increase after adjusting for inflation.

	1993	2003 (adjusted)	Change (\$)	Change (%)
Earned	\$7 million	\$22 million	\$15 million	211%
Private	\$2 million	\$10 million	\$7 million	314%
Government	\$53 million	\$56 million	\$3 million	6%
Other	\$0 million	\$1 million	\$1 million	n/a
Total	\$62 million	\$89 million	\$26 million	42%

After adjusting for inflation, of the 21 galleries reporting to both years of the Data Exchange:

- 14 increased their total revenues, while 7 saw a decrease in total revenues;
- 16 increased their earned revenues, 4 saw a decrease, and 1 saw no change;
- 19 increased their private sector revenues, while 2 saw a decrease; and
- 6 saw an increase in their government revenues, while the other 15 saw a decrease in their government revenues.

³ It should be noted that inflation in the actual costs experienced by Ontario's public art galleries might not be exactly the same as the increase in the Canadian Consumer Price Index.

Inflation-adjusted changes excluding the three largest organizations (“Group of 18”)

Excluding the National Gallery, the Art Gallery of Ontario and the McMichael Collection, the inflation-adjusted figures for the other 18 galleries in the historical group show that there were large increases in earned and private revenues and a significant decrease in government revenues between 1993 and 2003:

- Total revenues increased from \$11 million to \$13 million between 1993 and 2003, a 24% increase.
- Earned revenues increased from \$1.9 million to \$2.8 million, a 48% increase in earned revenues.
- Private sector revenues increased from \$0.8 million to \$3.2 million. This is a fourfold increase.
- Government revenues decreased from \$8.1 million to \$7.2 million, a 12% decrease.

After adjusting for inflation, of these 18 galleries:

- 16 increased their total revenues, while 2 experienced a decrease in total revenues;
- 14 increased their earned revenues, 3 saw a decrease, and 1 saw no change;
- all 18 increased their private sector revenues; and
- 9 received an increase in their government revenues, while the other 9 experienced a decrease in their government revenues.

Section 14: Changes in exhibitions, attendance, collections and staffing between 1993 and 2003

Exhibitions, attendance and admissions

The number of exhibitions presented in the 21 galleries reporting in both 1993 and 2003 decreased from 393 to 368, a 6% decrease.

Attendance at the 21 galleries increased from 1.3 million in 1993 to 2.0 million in 2003, a 48% increase.

The hours that the 21 public art galleries were open to the public decreased by 10% between 1993 and 2003, and evening hours decreased by 30% during the same period.

Regarding admissions policies:

- There was a slight decrease in the number of galleries offering free admissions (10 in 1993 and 8 in 2003).
- There was a slight decrease in the number of galleries offering voluntary admissions (7 in 1993 and 5 in 2003); and
- There was an increase in the number of galleries with mandatory admission fees (4 in 1993 and 8 in 2003), although the mandatory category in 2003 includes 4 galleries with partially free or partially voluntary admissions.

Collections

The permanent collections of the 21 galleries increased in size by 30,000 works between 1993 and 2003. There were 105,000 works in the galleries' permanent collections in 1993 and 135,000 in 2003. This represents a 29% increase in the size of the galleries' permanent collections.

Many of these works were added in 2003. In that year, the 21 galleries' collections increased by nearly 13,000 works, 98% of which were donated.

In 1993, about 1,700 works were added to galleries' collections, 80% of which were donated.

Only about 240 works were purchased by the 21 galleries in 2003, while about 430 works were purchased in 1993.

The value of the donated works increased substantially, from \$19 million in 1993 to \$128 million in 2003.

Staff and volunteers

Between 1993 and 2003, staffing increased in some categories and decreased in others:

- The number of permanent full-time staff members increased from 370 to 422.
- The number of permanent part-time staff members decreased from 154 to 76.
- The number of volunteers increased by 32%, from 1,800 in 1993 to 2,400 in 2003. However, no comparison of the number of hours volunteered or the nature of the work completed by volunteers is possible.

Note: The staff and volunteer figures exclude the AGO and the McMichael Collection, which did not report their staffing or volunteers. The volunteer figures also exclude four other galleries that did not report their volunteer figures in 1993 or 2003.

2003 OAAG Data Exchange

The 2003 OAAG Data Exchange provides a clear, concise and accessible report that examines and interprets the activities of 39 non-profit public art galleries across the province of Ontario based on their last completed audited financial year prior to September 30, 2003.

Based on audited financial statements and carefully compiled statistical evidence, this major research initiative provides reliable data and significant information on public art galleries across Ontario, their regional audiences, members, activities, operations, collections and capital.

The 2003 OAAG Data Exchange is the only report that addresses the Ontario public art gallery sector as a whole. This includes Toronto and surrounding areas, east, west and northern Ontario, many municipal and regional art galleries, galleries that are agencies of the province, like the Art Gallery of Ontario and the McMichael Canadian Art Collection, as well as the National Gallery of Canada in Ottawa. The project comprised a detailed report, an Executive Summary, and a presentation to the 2005 OAAG annual general meeting.

This comparative approach expanded upon the findings of a baseline OAAG study ten years ago in 1993 involving 37 public art galleries across Ontario.

Analysis and level of detail set this project apart from existing Statistics Canada data, which provided only summary information for all art galleries in Canada, with no regional breakdowns. The 2003 OAAG Data Exchange provides in-depth analysis of art gallery operations and also identifies shifts in operations based on the results of the 1993 and 2003 projects.

Hill Strategies was contracted to develop the survey, analyze the data and produce the report. The Ontario Association of Art Galleries printed, distributed and collected the survey and compiled a Filemaker Pro database. The database and the report provide a new benchmark for assessments and future planning for the public art gallery sector for funders, policy makers, public art galleries, volunteer boards and the public.

OAAG's intent

The 2003 OAAG Data Exchange, a 35th anniversary project, serves the primary mission of the Ontario Association of Art Galleries, which is to effectively represent Ontario's public art galleries, museums and associated visual arts organizations as essential and valued cultural resources.

Demetra Christakos
Executive Director
Ontario Association of Art Galleries