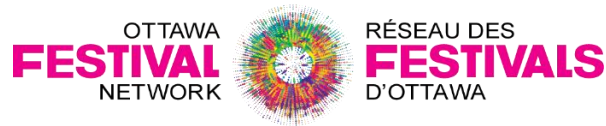


Monday, June 22, 2020

Presentation to:
Standing Committee on Finance and Economic Affairs,
Re: COVID-19 impacts on the Tourism industry

Presentation by:



Carole Anne Piccinin, Executive Director
Ottawa Festival Network

Good morning. My name is Carole Anne Piccinin, and I am the Executive Director of the Ottawa Festival Network.

The Ottawa Festival Network is a not-for-profit service organization representing the vast majority of festival, special event and fair industry members in the National Capital Region. We advance our industry through research, advocacy, and education. Next year, OFN will celebrate its 25th year of operation.

Ottawa is a festival city. Our festival industry is an important part of our city's brand DNA. Many of our festivals are world-renowned, and most are not-for-profit. Annually, Ottawa festivals have more attendees than Parliament Hill has visitors, and Ottawa is the most celebrated festival city in Canada by the International Festivals and Events Association.

Our creative, entrepreneurial festival producers have a tremendous impact on Ontario's economic prosperity and quality of life.

Here are some stats from our 2019 impact study of just 40 festivals:

- Our industry annually supports the booking of **234K hotel room nights**;
- **Visitor spending of \$122.5 million of "new money"** contributes to our festival industry's **overall \$222.6 million GDP, with a provincial tax contribution of \$17.3 million** – this does not account for spending by locals;
- Our industry supports 68.8K direct and indirect jobs combined;
- Our industry generates 8.3 million dollars of economic value of volunteer hours; and
- Well over 1.1 million dollars raised annually for charities by 15 of our local festivals.

As such, festivals will be important for the recovery of Ontario's tourism industry.

However, in no way is this a business-as-usual year for festivals and events in Ottawa.

Here is the industry conundrum:

Festivals happen at a specified time, and revenues flow in correlation. However, festivals are run by organizations that have year-round operating expenses.

Festival revenue comes from multiple sources. 63% of festival revenue is earned revenue (made up of ticket and merchandise sales, and vendor fees for example). 13% comes from sponsors, and another 13% comes from all three levels of government, 7% of which is provincial.

During the COVID-19 pandemic, with festival earned revenue and sponsor investment levels down considerably, government funding is a lifeline for our industry.

This year, festivals are being reimagined online and at drive-in events. They have had to pivot quickly to re-establish with limited resources. Although audiences are engaging in these experiences, with some festivals reporting digital audience growth and diversification expansion, festivals are challenging to monetize in these formats. Consequently, some festivals will be forced to fold.

Our industry success and impact are due in great part to the support of programs under the Ministry of Heritage, Sport, Tourism and Culture Industries. There is an impressive 21 dollar-return for every one dollar the Province invests in festivals.

Investments made by the Province to date are making a difference to events in receipt of funding, for which we are grateful.

We wish to acknowledge the indefatigable Minister MacLeod, for her hard work and progress during the COVID-19 crisis, and for her invitation for continued open communication towards finding solutions.

In the immediate term, we ask that this government continue to champion greater industry access to these investments, with maximum fund flexibility and speed. We ask that remaining program funds flow towards stabilizing our survival and recovery. This means:

- Revising funding programs to cover core operating costs and eliminating or reducing matching funding requirements; and
- Redirect or establish new funding now to support increased industry expertise in digital offerings, including virtual programming, streaming, artificial intelligence, virtual reality, etc.

These investments will keep vital scaffolding around festival organizations, so that they can continue to survive, and create Ontario-grown experiences, connecting Ontarians to their communities – which we know are not only vital to our economic health, but to our mental health and well-being.

As we head down the road towards phase four, we encourage you to:

- Develop a PPE and sanitation fund and strategy, so that supplies can be accessed with maximum affordability when large scale events reopen. Recent provincial government funded research shows that public scrutiny of event safety precautions will be high, and safe events will be a major determinant of mass large-scale event attendance;
- Follow through on legislation passed in 2018, and regulate the use of professional civilian security rather than “paid-duty” police officers, to provide security for events;
- Support our federal advocacy to align cannabis sponsorship laws with alcohol (and not tobacco) legislation. This will broaden out needed festival sponsorship opportunities coming out of COVID-19.

OFN will continue to track and report on local industry layoffs, closures both temporary and permanent, the drastic loss of revenue and related deficits, and industry diversification needs; however, we know that the full impact of COVID-19 will not be fully understood until we enter into the fourth recovery phase, as festival event and fair businesses that remain economically viable begin to re-open once again to crowds.

The festival industry, which is one of the most impacted, with the necessary temporary erasure of the visitor economy, will be one of the slowest industries to recover, but will be important to help stabilize the ecology of local business it supports – artists, hotels, restaurants, retail and transportation, to name but a few.

The slow recovery of our sector also means that there is serious risk that the festival workforce will be absorbed into other industries. When we begin to enter the recovery stage, we will require support for rapid re-employment strategies.

To help keep our industry COVID-19 proof, we anticipate that our industry will also require direct investment to stimulate reignition of our tourism engines towards full throttle. Programs like the proven federal Marquis Tourism Events program will key to jump start our industry: https://www.ic.gc.ca/eic/site/ae-ve.nsf/eng/h_03423.html

Despite the many potential perilous impacts to our industry, Ottawa festivals remain steadfast to their craft – we are resilient. We are known as Canada’s Festival Capital – and we work hard every day to live up to that moniker.

Thank you for this opportunity to present today.

We look forward to a continued strong partnership with the Province and our key tourism stakeholders to support a vibrant, inspired and prosperous festival capital.

-END-

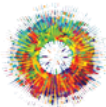


THE IMPACT OF FESTIVALS, SPECIAL EVENTS AND FAIRS IN CANADA'S FESTIVAL CAPITAL

PILOT BASELINE STUDY, 2019

PRESENTED BY:

OTTAWA
FESTIVAL
NETWORK



RÉSEAU DES
FESTIVALS
D'OTTAWA

SUPPORTED BY:

OTTAWA
TOURISM • TOURISME





Image courtesy of Festival franco-ontarien

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Image by Aaron Goldman courtesy of CityFolk

FOREWARD

We are pleased to present this pilot baseline study on the impact of festivals, special events and fairs¹ on Canada's Festival Capital. We gratefully acknowledge the support of Ottawa Tourism and the City of Ottawa to enable us to undertake this study.

As the first-of-its kind, this study provides a benchmark for repeatable and continued measurement to fulfill OFN's research mandate and will also serve as a first step towards a broader, more in-depth impact study that will take a look at the economic, social and cultural impacts.

This study is timely for many reasons, including the importance of leveraging Ottawa's festival industry as a cultural tourism asset. Cultural tourism is one of the fastest growing tourism segments. It plays a major role in global tourism today, as consumers look for more authentic and local experiences when and where they travel.²

Annual festivals, special events and fairs have tremendous beneficial economic, social and cultural impacts on quality of life and prosperity in Canada's Capital Region. This study is a first step towards capturing tangible evidence to provide a holistic view of the

industry's impact on the economy, employment and the community as a whole, and is the first-of-its-kind study for Ottawa's festival industry. **To provide a more realistic assessment, conservative assumptions were used and estimates account only for "new" money brought into the region due to the annual events that are hosted in our community.**

Festivals, special events and fairs are important contributors to Ottawa's economy, and accounted for more than \$222.6 million total spending (\$141.2 million direct and \$81.4 indirect and induced) generated by activities at just 37 of the annual events that take place. And the economic impact is far reaching in our community with direct sales being spread to lodging (27%), food and beverage (24%), retail (15%), transportation (14%), other forms of recreation (10%), business services (8%), and A/V (3%). The tourism industry benefits from an estimated 234K room nights, 104K peak rooms and more than 968K visitor days.

Spending generated by visitors, organizers and sponsors, supported 68,798 jobs (58,433 direct and 10,364 indirect and induced) and generated \$63 million in personal income and more than \$33 million in taxes to the three levels of government. Festivals also provide an important venue for local artists, groups

¹ Within this report, the term "festivals" will represent festivals, special events and fairs

² United Nations World Tourism Organization, Tourism and Cultural Synergies report, October 2018



and performers, with 33 events reporting that 1628 of a total of 4366 artists employed were local.

Festival, special event and fair organizers are passionate entrepreneurs leading social enterprises that are able to leverage public investment while making significant contributions to the community. 63% of reported revenue is earned, with sponsorship (13%), government funding (13%) and in-kind support (11%) rounding out the major contributions to revenue.

It has long been understood that festivals, special events and fairs are part of the social and cultural fabric of Canada's Capital Region, and the insight provided in this study reflects this sentiment. Organizers are rooted the community, and engaged with a variety of causes and organizations that make Ottawa a better

place to live. In addition, more than \$1.1 million was raised at 12 events for partner charities or causes, outside of their own charitable work and programs.

The community participation and support by volunteers provides further evidence to the importance of the industry. More than 16,632 volunteers dedicate over 310,000 hours with an economic equivalent of \$8.3 million.

The relationship between festivals and the community is symbiotic, each benefitting greatly from the contribution of the other. For the most part, having a positive impact on the community is most festivals' reason for being. **As a pilot study, and starting point for this type of research in Canada's festival Capital, we are just seeing the tip of the iceberg.**

We thank everyone who graciously shared their time and insights participating in this study, and to those who shared advice, direction and wisdom along the way.

Carole Anne Piccinin
Executive Director
Ottawa Festival Network

Holly Tarrison-Gaskin
President and Chair
Ottawa Festival Network

Sean Wilson
Past-President
Ottawa Festival Network

OTTAWA FESTIVAL NETWORK

INDUSTRY IMPACT

\$222.6
MILLION
TOTAL SPENDING

\$81.4
MILLION
INDIRECT SPENDING

\$141.2
MILLION
DIRECT SPENDING

ECONOMIC IMPACT¹

58,433
DIRECT JOBS
SUPPORTED

10,364
INDIRECT JOBS
SUPPORTED

68,798
TOTAL JOBS
SUPPORTED

JOBS¹

\$63M
PERSONAL
INCOME

\$8.3M
ECONOMIC
VALUE OF
VOLUNTEERS

SOCIAL IMPACT²

310,000
HOURS

16,632
VOLUNTEERS

\$1.1M
RAISED FOR
PARTNER
CHARITIES³

1. EIC estimate based on survey responses from 37 events

2. Estimate based on survey responses from 43 events

3. Aggregate based on responses from 15 events

2.6⁺
MILLION
AUDIENCE
@ 42 EVENTS

AUDIENCE¹

42%
FREE
EVENTS

58%
TICKETED
EVENTS

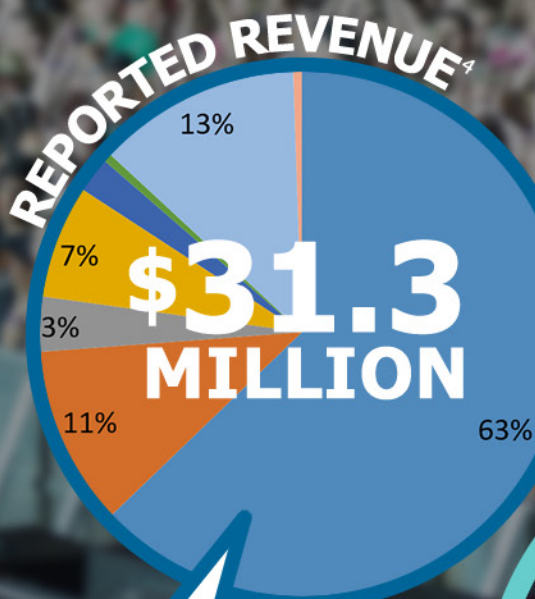
234K
ROOM
NIGHTS

\$122.5
MILLION
VISITOR SPENDING

968K
VISITOR
DAYS

104K
PEAK
ROOMS

VISITORS²



- Earned Revenue (63%)
- In-kind (11%)
- Federal Funding (3%)
- Provincial Funding (7%)
- Municipal Funding (2%)
- Foundation Funding (>1%)
- Sponsorship (13%)
- Other (1%)

1. Aggregate based on responses from 42 events
2. EIC estimate based on survey responses from 37 events
3. Aggregate based on responses from 33 events
4. Based on responses from 21 events

1628
LOCAL
ARTISTS

4366
TOTAL³
ARTISTS



CANADA'S FESTIVAL CAPITAL: OTTAWA'S FESTIVAL, SPECIAL EVENT + FAIR INDUSTRY

Named as a World Festival & Event City¹ three times, and twice recognized as one of Ontario's Best Festival Cities,² it is no wonder that Ottawa is known as Canada's Festival Capital. The richness and diversity of the festivals, special events and fairs that the National Capital Region (NCR) hosts is proof of that sentiment.

Ottawa's industry is comprised of annual events that are a delivery system of arts, culture, heritage, recreation and sport. Events range from community and neighbourhood celebrations to internationally recognized signature events that draw local residents and visitors from across North America and the world.

More than 300 events were identified during a recent festival market analysis conducted by Ottawa Festival Network (OFN), Ottawa Tourism and City of Ottawa. The parameters of the exercise were to identify local annual events with a minimum of 500 attendees that take place in Ottawa.³ In addition to these events that take place in every ward of Ottawa, there are numerous others that take place throughout the NCR.

Annual festivals, special events and fairs take place throughout the year. The largest concentration is during peak tourism season May to September which accounts for 56% of events held, while the remaining 44% take place during the shoulder seasons.⁴

The vast majority of annual festivals, special events and fairs are run by incorporated non-profit or charity organizations.⁵ There is an almost equal split between those that are volunteer led with staff support, and organizations wholly run by volunteers.



¹ IFEA World Festival & Event City Award recipient in 2010, 2013 and 2018

² FEO Municipality of the Year award in 2014 and 2018

³ List developed based on existing inventory sources (calendars) and social media and online platforms

⁴ Festival Inventory. Ottawa Tourism and OFN, 2018

⁵ Based on OFN Membership



Image by Aaron Goldman courtesy of CityFolk

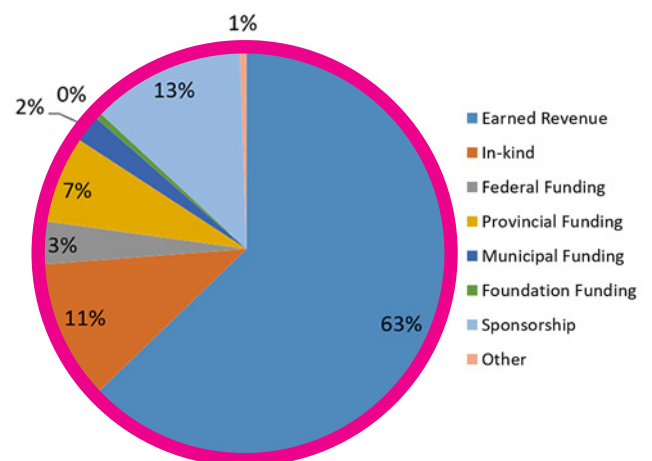
REVENUE: AN INDUSTRY THAT LEVERAGES INVESTMENT

The total reported revenue in 2016 was \$31,343,908.89¹ for the 21 respondents who provided revenue information.

Sources of revenue were identified by survey participants. By far, most revenue came from the earned revenue category (e.g., ticket sales, merchandise, food and beverage) followed by sponsorship and in-kind contributions. Government funding and sponsorship each accounted for 13% of the total revenue reported.

These results are similar to figures provided in a report from the City of Ottawa² which show that earned revenue accounted for 56.4%, total government funding 15.7% and private revenue at 26.21%. This same report also documented that events that received funding from the City of Ottawa leveraged every \$1 to \$27 in additional revenue from other sources.

Revenue Sources



63% of revenue is earned revenue, with 13% coming from all three levels of government and 13% from sponsors.

¹ Aggregate based on 21 participants

² Report for City of Ottawa's Partnership Program for Major Festivals and Fairs, 2012



Image by Steve Gercke courtesy of RBC Bluesfest

ATTENDANCE AND TICKETING

In 2016, the total number of attendees was 2,571,960¹ at 42 festivals, special events and fairs.

Participants provided attendance figures based on methods that ranged from using ticket sales, head-counts, or data provided by market research companies.

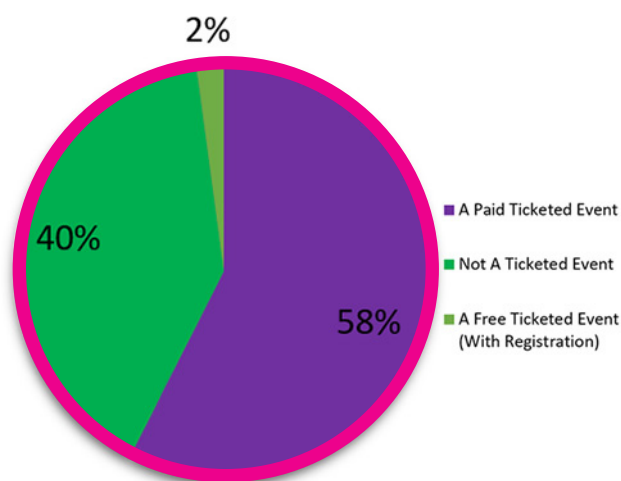
A survey of 65 OFN members conducted in 2012 revealed an attendance of 3.5 million attendees.

Ticketing

58% of participants identified that they operate paid events that required tickets while 40% operated free, non-ticketed events. 2% of respondents reported that they are a free ticketed event.

Participants were also asked what other types of ticketing their events included. 31% of participants said that their events included additional paid events. There was a more even split among additional types of ticketing for other activities (e.g., workshops) that take place during their main event.

Ticket types: Main Event



¹ Aggregate of attendance figures provided by 42 respondents



Image courtesy of Carp Fair

MEASURING THE ECONOMIC IMPACT OF FESTIVALS, SPECIAL EVENTS + FAIRS

The economic impact numbers in this report are presented in partnership with Ottawa Tourism using Destination International's Event Impact Calculator (EIC) developed by Tourism Economics, an Oxford Economics Company. The calculator is used internationally, and more than 90,000¹ conference and sporting events have been analyzed using the tool.

Understanding that festivals and cultural events have tremendous impact, and are unique from other event types in terms of spending characteristics and activities, visitor profile, and length of stay, the EIC Festival and Cultural Event module was introduced in 2016, with the Canadian version being released in 2017.

The EIC Festival and Cultural Event module was built to accommodate broad and diverse types of events. The module has five unique types of events that include performing arts, visual arts, film & awards, food & drink and other cultural events – each with their own impact calculations based on extensive industry research.

EIC development model considerations:

- The flexible data requirements are based on the understanding that there are varying levels of research sophistication and capacity

- The tool uses a standardized framework based on research, and provides consistency regardless of the host community
- Localized, city-specific impact models are built based on local data such as taxes and labour market information
- The tool offers credibility in terms of the research and multiple data sources used to develop the models (industry surveys, Longwoods syndicated traveler survey, CRM data from more than 150 DMOs, city-level economic data and tax information and festival event research)

Economic impact of an event within the EIC model counts only "new" money that is brought into an area due to an event. A local attendee spending money during the event would be expected to spend within the jurisdiction at some other point in time anyway, so this spending is excluded from the analysis.²

Spending by local participants, or to support local attendance is not reflected in the economic impact, but some of this information is provided in the report by way of information.

¹ Destination International, 2017

² The EIC Event Impact Calculator Glossary

\$223M
EVENT
IMPACT



Image courtesy of Ottawa Beer Fest

EVENT IMPACT: VISITOR, ORGANIZER + SPONSOR

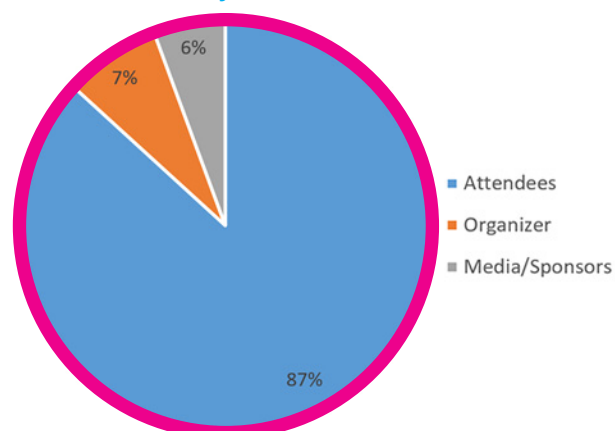
Total business sales in 2016 equaled \$222,555,311¹, with \$141,163,003 being attributed to direct spending and \$81,396,309 to indirect and induced spending.

Total Business Sales (\$222,555,311) can also be referred to as the economic impact of an event.² This is a comprehensive view of the impact of an event, capturing the multiplying effect of dollars spent as they flow through the local economy.

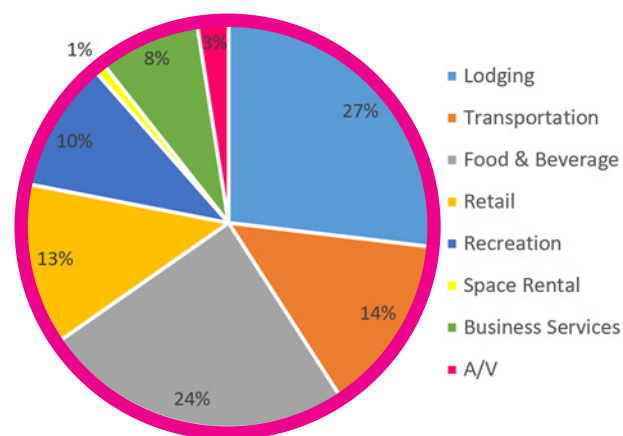
Direct business sales (\$141,163,003), or direct impact, is presented both by source: visitor (\$122,479,757), organizer (\$10,722,367) and sponsor (\$7,960,879); and by industry sector. The latter aggregates spending categories into the following industries for the sake of impact analysis: lodging; transportation; food & beverage; retail; recreation; space rental; business services; and A/V. Organizer spending accounts only for spending within the local area.

Indirect impact (\$81,396,309) includes indirect (B2B supply chain purchases) and induced (incomes spent in the local economy) business sales. This provides a more complete view of the impact of an event as dollars flow through the local economy.

Direct Sales by Source



Direct Sales by Industry Sector



¹ EIC estimate based on survey responses from 37 members reflecting economic activity generated by visitor spending

² The EIC Event Impact Calculator Glossary



TOURISM IMPACT: VISITOR

Festivals, special events and fairs generate a total estimated room demand of 234,385¹ with peak rooms at 104,474 and total visitor days estimated at 967,693.

The total room nights generated by the event estimate incorporates the duration of the event, number of attendees, type of event, occupancy per room, and average length of stay.²

The peak rooms calculation estimates the number of rooms sold at the high point of the event.

Total number of visitor days generated by the event, includes overnight and day visitors.

Visitors attending annual festivals, special events and fairs spent \$122,479,756³ in 2016 during their trip to Ottawa.

Industry	Amount
Lodging	\$36,743,267
Transportation	\$19,542,485
Food & Beverage	\$33,420,956
Retail	\$18,005,303
Recreation	\$14,767,742

¹ EIC estimate based on the responses of 37 participants

² The EIC Event Impact Calculator Glossary

³ EIC estimate based on the responses of 37 participants

234K
ESTIMATED
ROOM
DEMAND

967K
VISITOR
DAYS

104K
PEAK ROOMS

Visitor Spending by Industry Sector

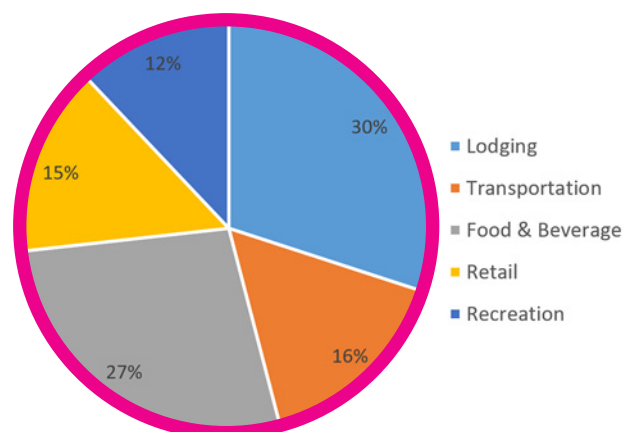




Image by Aaron Goldman courtesy of CityFolk

68.8K
JOBS
SUPPORTED

\$63M
PERSONAL
INCOME

EMPLOYMENT: JOBS SUPPORTED + PERSONAL INCOME

There are 68,799¹ jobs supported. This includes 58,434 direct jobs and 10,365 indirect jobs supported.

Total jobs supported includes employment supported by all event-related business sales. It includes indirect (B2B supply chain purchases) and induced (incomes spent in the local economy) business sales. This is a more complete view of the impact of an event as dollars flow through the local economy.²

Direct employment is the employment equivalent of Direct Business Sales. It measures the number of jobs supported during the event, directly by the service providers. This includes lodging, food & beverage, transportation, facility management, AV, retail, recreation, and security.

“Jobs Supported” does not imply these jobs would not exist apart from the event, only that the event supported these jobs for a discreet period of time. This quantifies the number of persons employed during the event, including full and part time employees.

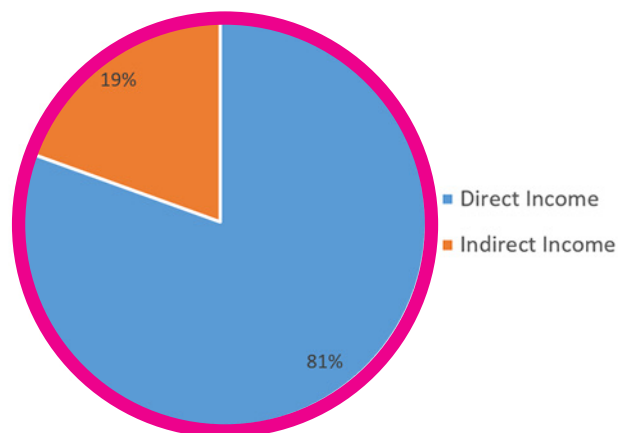
Being very much part of the “gig economy”, these job supported are the equivalent of approximately 1,420 FTE positions.³

Total personal income generated by jobs supported is \$62,995,263¹ with \$50,726,184 direct and \$12,269,077 indirect and induced.

Personal income includes all forms of income accruing to households as a result of the event, both through direct and indirect business activity. This includes: wages and salaries; other labor income; proprietor’s income; and transfer payments.

¹ EIC calculation based on the responses of 37 participants

Direct vs Indirect Jobs Supported



¹ EIC estimate based on the responses of 37 participants

² The EIC Event Impact Calculator Glossary

³ EIC estimate based on the responses of 37 participants



Image courtesy of TD Ottawa Jazz Festival

TAXES AND ASSESSMENTS

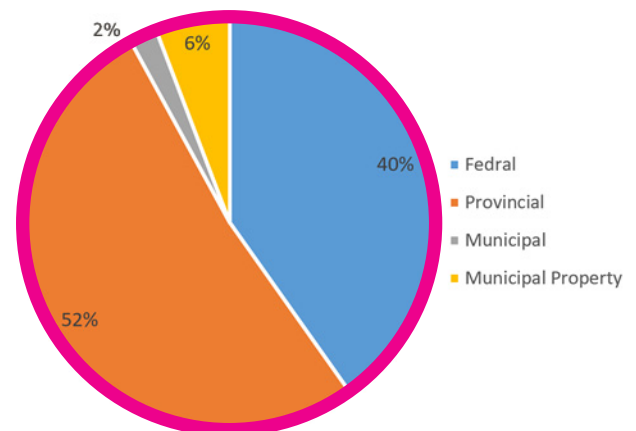
Spending generated due to visitors at Ottawa's festivals, special events and fairs contributes \$33,447,808¹ in taxes to the three levels of government.

This includes taxes generated by events that incorporate accommodations and sales taxes from visitor spending, revenue streams from property taxes paid by businesses that serve the event, and income taxes of workers supported by the event.

Taxes generated:

- \$13,443,220 to federal tax coffers with \$10,162,151 direct and \$3,281,069 indirect.
- The total contribution to provincial taxes is \$17,339,036 with \$14,146,366 direct and \$3,192,669 indirect.
- At the municipal level, total contribution to taxes is \$717,384 (not accounting for personal property taxes) with \$517,748 being direct and \$199,636 indirect. Property taxes generated due to total business sales are estimated at \$1,948,168.

Tax Contributions



Total Tax Contributions

Federal: \$13,443,220
 Provincial: \$17,339,036
 Municipal: \$717,383
 Municipal Property: \$1,948,168
Total: \$33,447,808

¹IEIC calculation based on the responses of 37 participants



Image by Peter Agripio

LOCAL ARTISTS

A total of 1,628¹ local artists were reported out of an estimated total of 4,366 artists across 33 events.

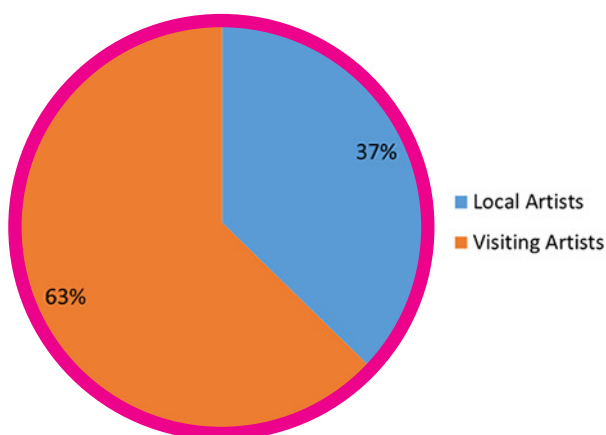
Participants were asked how many local artists² take part in their program and what percentage of their programming featured local artists.

16 respondents reported that more than 50% of their artists were local. Five participants reported that 100% of their artists were local.

“ Festivals are a vital part of our local music economy. Not only do they help artists grow their fanbase, but it is through the artist fees paid by local festivals that many artists have been able to record, produce, and tour new music. Festivals are, in many ways, the financial engine of our local industry.

— Nik Ives-Allison
Executive Director
Ottawa Music Industry Coalition

Share of Local Artists



¹ Aggregate based on responses from 33 participants

² Groups were counted as one artist and were counted once per festival



CAPTURING THE SOCIAL IMPACTS OF FESTIVALS, SPECIAL EVENTS + FAIRS

For the purposes of this report, social impact is defined as the tangible and intangible ways that events affect the surrounding community. The impact may be intentional and result from planned activities or a formal corporate social responsibility (CSR) strategy; or may be unintentional. The impact may be felt by people directly participating in the event, and may also have a broader impact on the community.

It is understood that events have positive social and cultural impacts. Examples from International Festival and Event Association (IFEA) include¹:

- Providing enhanced exposure opportunities for the arts, not-for-profit causes and other community programs and venues;
- Promoting volunteerism and bonding the many elements of the community together;
- Adding to the quality of life for local residents;
- Showcasing a positive community brand; and
- Encouraging community investment, participation, creativity and vision.

In this report, questions about social impact were added to the survey with the intention to provide participants an opportunity to share their perceptions and quantitative information where applicable, in terms of how they, and the industry, impact the community around them. The notion being that pro-

viding this social impact information would provide a more authentic, holistic and broad representation of the industry's overall impact. The responses were categorized to develop appropriate themes, and are presented within this report.

The majority of OFN member events are either presented by, or are registered non-profit or charity organizations unto themselves. For the purposes of this report, participants were viewed in the context of their "event" and undertakings as such.

While the social impacts and benefits of the festival industry are shared anecdotally through various sources, this is the first attempt by OFN to collect and aggregate some of this information and related stories.

¹ IFEA World Festival & Event City Award guide



Image by Andre Gagne courtesy of Capital Ukrainian Festival

VOLUNTEERS

The contribution of volunteers at festivals, special events and fairs in Ottawa is equivalent to an economic value of more than \$8,317,621.96¹. Participants reported a total number of 16,632² volunteers in 2016, working a total of 310,012 hours.

Volunteers are the lifeblood of Ottawa's festivals, special events and fairs. They dedicate their time, energy and passion in numerous roles and capacities.

Depending on the governance structure and staffing resources, OFN members fall into an equal split of events that are "volunteer-led and volunteer-supported," or "volunteer-led and staff supported".³

Some people volunteer year-round to help manage planning and operations, while others volunteer for the duration of the event itself.

\$8.3M
**ECONOMIC
VALUE OF
VOLUNTEERS**

**310,000
HOURS**

**16,632
VOLUNTEERS**

¹ Calculated based on the average Canadian wage of \$26.83 (Statistics Canada, 2018)

² Aggregate based on responses from 43 participants

³ Estimate based on OFN membership

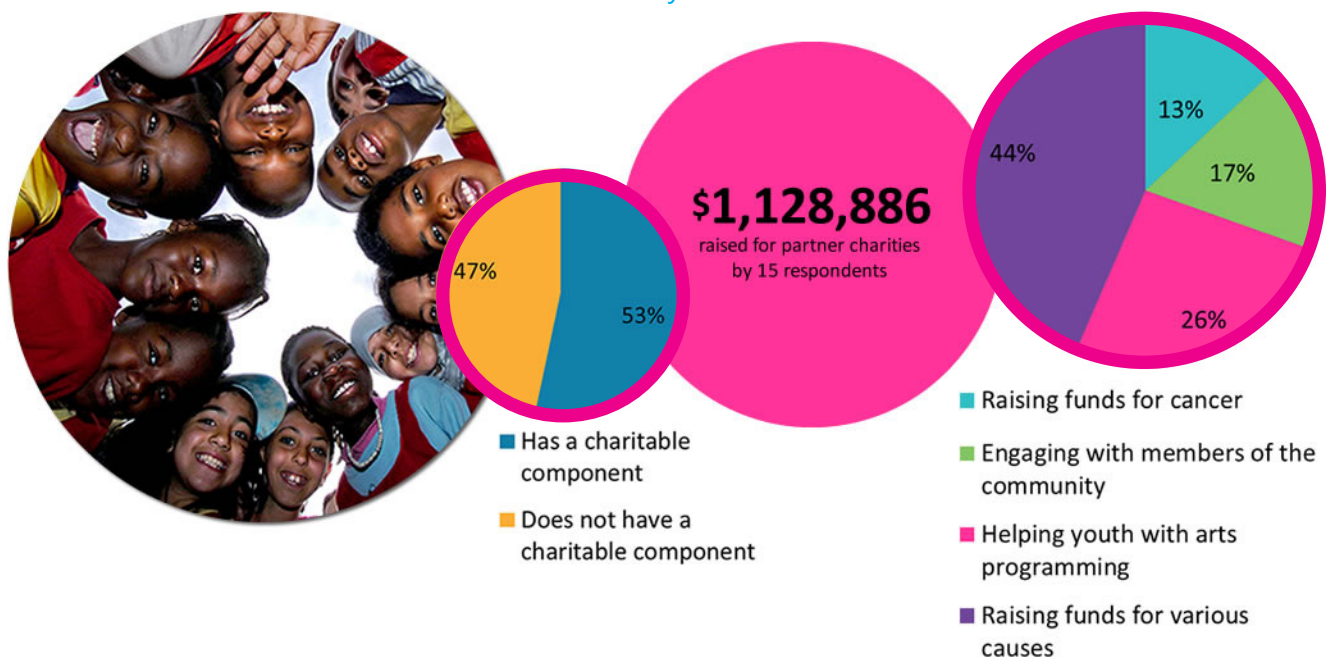


DIRECT CHARITABLE ACTIVITIES AND CONTRIBUTIONS

\$1,128,886¹ was raised directly as part of activities hosted and/or planned by 15 of Ottawa's festivals, special events and fairs.

Survey participants were asked whether their event had a formal charitable component. There was an almost even split between those who did and those who did not have an official charitable component. While about half the respondents reported to have a formal charitable component or activity as part of their event², this did not preclude them from engaging in additional charitable and/or community work.

Direct Charitable Activities and Contributions by the Numbers:



¹ Aggregate of 15 survey responses
² 21 out of 45 responses



Image by Aaron Goldman courtesy of CityFolk

Raising Funds for Cancer Support

Three participants reported support for cancer research. One participant explained how donations were collected, “through auctions and gates,” and distributed to charities like the Cancer Society and local groups. Another expressed a similar sentiment stating “we raise money through a wishing well and silent auction for the Ottawa Regional Cancer Foundation.”

Raising Funds for Various Causes through Festival/Event/Fair Activities

Within this theme, there were 10 participants who identified a variety of causes that their events supported throughout the year. Participants reported raising funds for “mental health organizations”, “food banks” and several other charities. One participant shared that, “We have between 5-7 charities chosen and each charity has a program [that] we support from proceeds raised by our registration.”

Helping Youth with Arts Programming

Some participants focused on exposing young people within their communities to enhanced arts programming. One participant expressed that their organization emphasized youth programming, “we are a charity with a focus on arts education and youth outreach.”

Several festivals reported that they collaborate with schools to deliver arts programming, some stating that the programs were free. Another shared that their heritage festival works with schools to celebrate the festival history and legacy, “Supporting school programs and

just putting out the information about the story [of the festival].” Other OFN members chose to support the youth through financial aid, for instance one stated that proceeds from activities go towards the CHEO foundation. Alternatively, some provided a way to allow underprivileged youth to attend their event, one sharing that they “organize transportation for youth centres/communities to come[to the festival]”.

Engaging with Members of the Community

For this theme, participants showcased extensive involvement within their communities.

One participant explained just how involved in the community they are, “We are a non-profit charitable organization. People donate to us. We support a number of community groups. We also provide the grounds free of charge to other organizations within the community for instance, one of the local high schools is using the grounds for their relay for life.”

Festivals reported support for charities and causes such as, “gift baskets, donations for silent auctions, that type of thing.” Additionally, there were participants whose events supported different groups in the community stating, “we give to churches,” and “A percentage of the ticket revenues go to rural community halls that participate in the event.”

One reported that, “We give money to artists. Giving money to artists is always a charitable act.”



ADDITIONAL CHARITABLE AND COMMUNITY WORK

The contributions to charities and community work done by a number of events and organizations that host events, continues year-round. Participants shared examples of these types of activities.

Through the responses, three broad theme areas emerged as causes and activities that they supported during the year outside of the time period of their event:

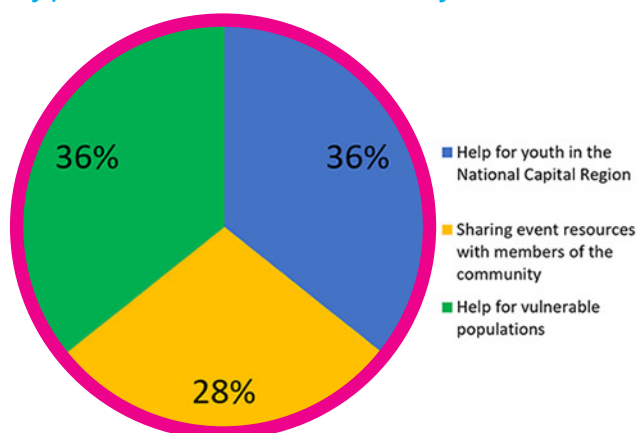
1. Help for vulnerable populations
2. Sharing Resources with the Community
3. Supporting Youth through Funding and Arts Programming

Serving Vulnerable Populations

Within the charitable activities that were top of mind for the participants, there was no explicit mention of helping vulnerable populations. However, this theme emerged when participants were prompted for additional (or less formal) charity work. One member said "we do workshops and a couple presentations in seniors' residences." Two participants explained that they would provide spaces and opportunities for arts programming such as "free workshops and tutorials in underserved communities."

One participant described their work in terms of community development, stating, "That was why we went to low income neighbourhoods and put on a mini hop, paint a mural, do some dance workshops. There were MC performances, DJ performances as

Types of Additional Charity Work



well as we worked with the community to provide a BBQ and food and stuff for everybody."

There are a number of festivals, special events, and fairs invested in the well-being of their communities through their involvement with these types of activities. Evidently, this is a way of preserving these community ties by "giving back" to those who need the help.



Image by Ottawa Festivals at Asinabka Festival

Sharing Event Resources with the Community

Within this theme, some participants seemed to try to minimize the effect of this particular type of charity work. For instance, one said “we do make donations periodically but they’re ad hoc. We provide free display space and they do their own thing.” While another explained how they occasionally shared their core festival products for fundraising, “We will contribute to a cause that comes to us by giving them tickets and [merchandise]. For instance in the fall we sell [the merchandise] to schools to resell and that’s how they can make money.”

Another festival representative also provided core festival items to the community “we also loan out our equipment, costumes and such for other community events and to other groups such as scouts and youth groups.” These responses help to demonstrate even stronger ties to the communities in the National Capital Region.

Supporting Youth through Funding and Arts Programming

This theme was present for a second time and it appears that OFN Members do engage with and support the youth on a regular basis. One participant explained how they integrate the youth activities with the festival, stating, “we’ve worked with Ottawa youth on two initiatives—one a performance piece and one an art piece. People submit ideas, and through our partnership with them, they display them at the festival.” One event shared information about their dedicated music program for the youth. “We run [a] program which has been ongoing since 1999. We bring, not only local, but international performers and they go into

schools. We had 22 schools this year and they do a two week residency program. They write songs and they do call and response and they perform it back to the school. We do a [band program] which is for the next level up in age and that hits high school and the goal of the program is, “Hey I’m a guitar player but none of my friends play music how do I get into a band?” One participant shared that within their space, they are able to partner with another community organization to provide music lessons and group lessons to kids and adults in the community.

Another representative explained their approach stating that “in addition to our work in schools, we also partner with the Ottawa Public Library to bring authors to young readers.”

Although many of these activities were reported by participants to be undertaken outside of their core activities, we do see a tremendous, ongoing commitment by many with consistent and even ongoing programs, and their demonstrated impact is quite substantial. This work appears to be targeting many in the National Capital Region who need and rely on help from a plethora of organizations, including these events.



Image by Andre Gagne courtesy of Capital Ukrainian Festival

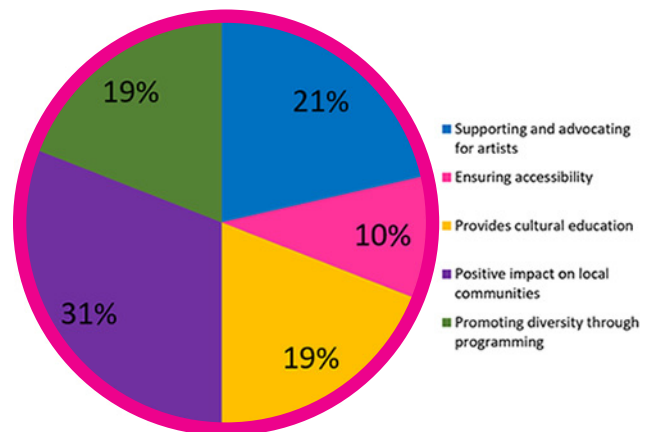
WELL-BEING AND QUALITY OF LIFE

Another aspect of giving back to the community relates to the notion of well-being and quality of life. In the survey, the respondents were asked to describe how their festival, special event and fair may improve the quality of life and well-being of those in the community (the presumption being that the events do in fact provide these benefits to the community). This notion is not unfounded as research (e.g., Ballantyne, Ballantyne, & Packer, 2014; Kruger, Rootenberg, & Ellis, 2013; Lee, Arcodia, & Lee, 2012; Liburd, & Derksen, 2009; Mahadevan, 2017; Packer & Ballantyne, 2011) has demonstrated that festivals and events can help to improve these feelings of well-being and quality of life. However, within the research (e.g., Ap, 1990; Kim, Jun, Walker, & Drane, 2015; King, Pizam, & Milman, 1993) there is mention of the negative impacts of these festivals, but negative perceptions were not evident in the responses from the OFN members.

Five theme areas became apparent in the responses:

1. Supporting and Advocating for Artists
2. Increasing Community Engagement through Activities
3. Educating the Public on a Variety of Cultures and Ideas
4. Promoting Diversity through Arts and Culture
5. Accessible and Available to All in the Community

Well-Being and Quality of Life Themes



Supporting and Advocating for Artists

Many participants viewed artists as an innate part of the community that they operated in. Given this, it is clear that the support that they provide focuses on the well-being and quality of life for these artists. One respondent said, "We provide an opportunity for artists to promote their music, which brings an amazing quality of life for them, and great entertainment for the community. At our conference, artists who come, perform for hospitals and schools."

In another case, a participant explained that they also help to showcase artists, "we engage the grassroots artists and provide them an opportunity to share the



Image courtesy of Capital Pride

stage with world class performers and entertainment.” This sentiment was echoed by another who shared, “We provide a lot of opportunities for the emerging artists to have a chance to perform on the stage alongside established artists, as well as being treated properly behind the scenes. And we try to pay these artists properly which doesn’t happen always happen. We try to get under-served communities to be treated professionally with their craft.”

Others stated that their approach entailed, “Promoting local musicians and dancers,” and why their particular approach worked, “Our festival and events impact the local arts community of Ottawa, by showing the high quality and wealth of talent in Indigenous arts. Our festival also pays Indigenous artists industry standard CARFAC and IMAA fees for presenting their work.”

These responses highlight the level of importance placed on supporting artists, especially local ones who can reap many benefits by being a part of these activities.

Increasing Community Engagement through Activities

While the importance of community involvement was touched on previously in another question, this theme explores the notion of community engagement further. It becomes apparent that the representatives are passionate about how their work contributes to the well-being and bonding of the communities year after year.

The 13 representatives in this theme were very descriptive when they discussed their engagement with the local community. One shared that, “People have a perception of insecurity and a safe event helps them to come out. Just celebrating together has value. Special moments spent together as a community. There is a sense of belonging and pride.”

Further, participants explained that events help to generate and foster cohesion and togetherness in the local communities, “The population around here probably doubles during fair time as can be seen by the cars parked literally for miles around. It’s another way to bring the community together and quite honestly bring back those who left the community, a lot of people return from all over the country.”

Another respondent referred to an event’s power to showcase and brand the host community, “So it’s a massive advertisement for our community. Our real estate agents are actually on duty that weekend. Sales spike after the festival because we have the benefit of living in a really pretty community and people see it at its finest. They come out and say ‘oh this is nice’ so there’s that aspect of it.”

Another member pointed out the year-long impact of their festival, “Now everyone feels comfortable going to everyone’s events. There are new businesses that have formed: catering; youth event planning; and communications entrepreneur. There are three new arts groups that formed – it’s very inspiring for the community because there’s not just impact that weekend, it lasts through the year. There’s more volunteers, more people in the arts, more businesses.”



Image courtesy of Music and Beyond

Other OFN members were more informal in their approaches but still perceived a benefit due to cultural education. For instance, one reported that, "We contribute arts and culture to neighbourhoods that may not otherwise get to the downtown core to experience theatre or art that's happening in the city because of money, transportation or comfort level. We bring arts and culture to them, and [for] many people it's their first theatre experience so it's awesome in that way."

The activities also rely on the work of the community, as voiced by one participant, "There are no volunteers from outside. We get community buy-in and we can't do it without Legions, Lions Clubs, churches, community halls." and another who shared, "...[the event] involves the whole community in planning, executing and participating in the festival."

Educating the Public on a Variety of Cultures and Ideas

Many festivals, special events, and fairs educate patrons through sheer exposure to different cultural experiences. Alternatively, many have official educational components that are a part of the event. One event made it their mission to incorporate an official cultural education component to their festival stating, "It's basically inviting people from any community and inviting them to their house and showing [their] heritage and culture so that other people will appreciate and understand it." Similarly, another shared, "[The festival] brings awareness about agriculture and one of our prime mandates is to educate people about agriculture and where their food comes from. So we try to stick to our roots."

One respondent expressed that, "It helps everyone to improve the understanding of Asian culture, especially for people who have never been there and helps people to experience what they usually experience in different parts of the world."

One festival was able to show a link to increased education about autism around the Ottawa area, "This past summer, there was someone who ended up getting a grant as a result of coming to our show, [and] finding out [about] workshops across Ottawa." These OFN members were helping to encourage greater education in their own way by addressing many different issues and ideas within the National Capital Region.

Promoting Diversity through Arts and Culture

OFN members proudly talked about the diversity associated with their activities. One said "We provide a neutral platform for all members of the community and all ethnicities, young and old, rich or poor to converge in a social setting. There are arts, entertainment, sport and children's activities." Another described it more succinctly sharing that, "It helps by bringing people of all ethnic backgrounds together."

Another explained how important diversity was to the fabric of their festival, "Every different aspect of somebody's life. We have doctors and lawyers and students and people on social assistance. Every person, every walk of life, you-we hope and we think that our volunteer base is as diverse as our attendees. The goal is to give everyone in the community an oppor-



Image courtesy of Festival franco-ontarien

tunity to take part in the festival whether they can be a ticket holder or not. The goal is to have them be a part of the festival no matter what their contribution to it might be.”

These responses suggest that diversity is viewed by these respondents as an important aspect of improving well-being and quality of life within the National Capital Region.

Accessible and Available to All in the Community

Four representatives explicitly mentioned that accessibility was important to their festival. This is related to the previous theme of promoting diversity through arts and culture as the OFN members are attempting to attract a variety of patrons and attendees. The participants wanted to ensure that their events were price-sensitive. They did not want to create and promote events that would be exclusionary to lower income would-be patrons.

One said simply that the “Festival is accessible to all income levels.” and another said, “Our mission is keeping art accessible to all, regardless of age, experience or income.” Similarly, it was also mentioned that the cost of the festival is important, “It is an affordable daily event for families to enjoy. Activities inside the gates are all free.”

Interestingly, one member focused on transportation and location as it related to accessibility stating that, “The same local downtown urban aspect to being accessible and not something that you can only come to if you can drive.”

One member went above and beyond in their approach to accessibility by ensuring a welcoming event for children with disabilities, “The special needs program kept everyone focused on what was going on and we grew it from 500 to 1500 kids. It’s a complete free day for the kids. It’s a private party. It’s the day before we open. The grounds are closed. The ride speeds are reduced for the kids. The sound doesn’t blare because some of them are noise sensitive. The food we provide them with is an all-beef hot dog lunch, a plain ice cream with no peanuts. We’re not big on broadcasting that. We’re not doing it for recognition.”



Image by Pragyan Bezbaruah

COLLABORATION BETWEEN SOCIAL AND CULTURAL GROUPS

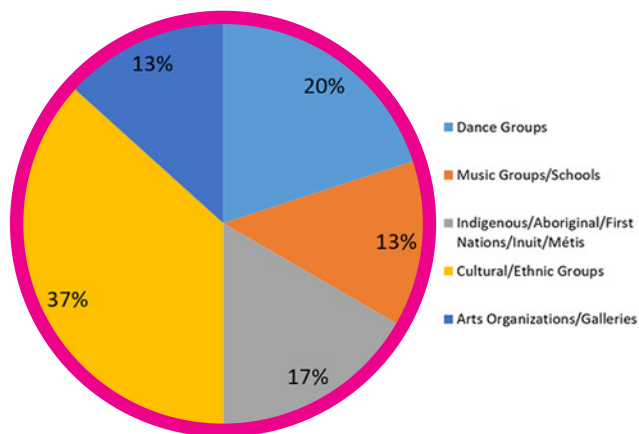
Festivals, special events, and fairs are collaborative by their nature. In fact, 79% of respondents reported that they had collaborated with at least one other group.¹ Five members reported that they have collaborated with other cultural festivals.

One such example was provided by a participant who said, “We have liaised with other festivals. For instance we collaborated with a [cultural festival] and we ended up with a whole group of folks who had never been out to [our community] before. It’s important to see that exchange between cultural communities.”

Another respondent shared that, “Local dance groups from different ethnic backgrounds participate in the two multicultural evenings during [the festival].” Some festivals collaborated with groups that were culturally similar to them or groups from nearby regions. For instance, one participant representing a European festival said, “We have partnerships with the Eastern European Block countries. We invite them to participate on stage.”

Similarly, another participant said, “We contact Japanese, Koreans, Vietnamese, Malaysians, and China of course. Hong Kong and Taiwan. So we bring all of those community groups together and we give each community group a space to display food and showcase their culture.”

Types of Collaboration



Meanwhile, two other participants collaborated locally and provincially, stating, “We partner with the [the cultural festival]. They provide us with dancers and food. We have Vikings from Montreal and different types of people. We collaborate both locally and outside Ottawa, many of the cultural associations and social organizations in [our cultural] community.” Furthermore, there were participants who collaborated with organizations that represent people with disabilities. One went on to say that, “We also partner with the Ottawa mission to give away free tickets to them every year and we also had six disabled adults from a group home.”

¹ Based on responses from 38 participants



PILOT BASELINE STUDY METHODOLOGY

Data Collection

The Pilot Baseline Study was based on survey responses from 48 organizations that were conducted during one-on-one interviews. Participants were recruited from a pool of 76 member organizations¹, resulting in a response rate of 63%. After two separate detailed data cleansing and validation exercises, 37 surveys provided the complete data required and fit the parameters for the economic impact portion of the study. Answers from the remainder were considered for the remaining portions of the survey.

The Pilot Baseline Study contained 89 questions that included organization information, event parameters required for the EIC (i.e., dates, event type, overnight visitors, organizer spending, etc.), event profile information and social impact.

Data Analysis

To complete the economic impact analysis, survey responses were provided to Ottawa Tourism for input into the EIC². The EIC calculates the impact of events based on event type, therefore individual reports were run and then aggregated to provide industry impact data. The survey data (which was provided by the festivals) was vetted against the reported Average Daily Rate (ADR) in Ottawa during the timeframe of each festival and adjusted accordingly. The ADR was sourced from Smith Travel Research (STR).

¹ 76 OFN members organizations, representing 82 events

² More information about the EIC is supplied on page 9. The specific impact definitions are provided within the report.

The EIC uses model-generated default values based on localized metrics and data. The model utilizes a limited number of user inputs that are organized into four areas: event parameters, hosting costs, organization spending and tax rates.

Economic impact of an event within the EIC model counts only "new" money that is brought into an area due to an event. A local attendee spending money during the event would be expected to spend within the jurisdiction at some other point in time anyway, so this spending is excluded from the analysis.³

In terms of the remaining survey responses, quantitative data was aggregated. Qualitative information was grouped based on 3 rounds of coding, and ultimately categorized into themes.

Limitations

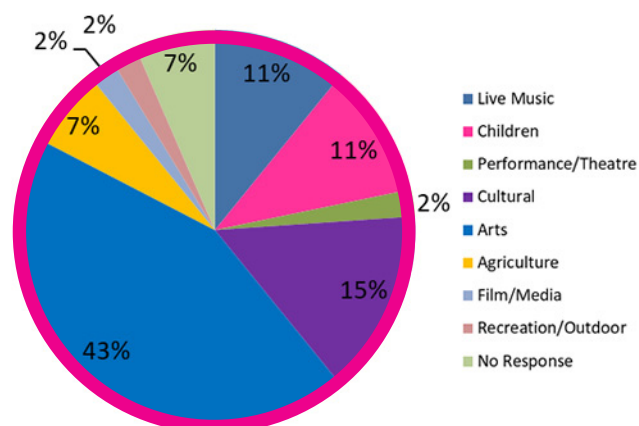
Any report of this nature requires clear articulation of its limitations (O'Reilly). The data upon which the impact estimates are made are primary in nature but in some cases may be limited in their scope, sampling or quality. As indicated, conservative estimates were taken and reasonable assumptions made. Given the nature of the data collection, the limited resources available and access to data, a margin of error must be considered for all reported data.

³ The EIC Event Impact Calculator Glossary



THANK YOU: SURVEY PARTICIPANTS

A Company of Fools Torchlight Shakespeare
 Almonte Celtfest
 Alterna Savings Crack Up
 Asinabka Film & Media Arts Festival
 Canada Day
 Canada Day in Kanata
 Canada Scene
 Canadian Tulip Festival
 Capital Fair
 Capital Ukrainian Festival
 Carp Fair
 Christmas Lights Across Canada
 CityFolk
 Festival of Quilts
 Folk Music Ontario Conference
 Grassroots Festival
 Great Indian Festival
 Hogman-eh
 HOPE Volleyball SummerFest
 House of PainT Festival of Urban Arts and Culture
 Irish Film Festival
 Italian Week
 Kingdom of Osgoode Medieval Festival
 Living Flag on Downtown Rideau
 Lumière Festival
 Maker Faire Ottawa
 Navan Fair
 Ontario Festival of Small Halls
 Ottawa Asian Night Market
 Ottawa Beer Fest
 Ottawa Chamberfest
 Ottawa Fringe Festival
 Ottawa Geek Market
 Ottawa Greek Festival



The survey participants self-identified as one of the categories provided in the chart above.

Ottawa International Animation Festival
 Ottawa International Writers Festival
 Ottawa Storytellers
 Puppets up
 RBC Bluesfest
 Santa Shuffle
 SouthAsianFest
 Ta! Da! Festival
 Tamarack Ottawa Race Weekend
 TD Ottawa Jazz Festival
 The Brewery Market
 Tim Hortons Ottawa Dragonboat Festival
 Wakefield Doc Fest
 Winterlude

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