

ONTARIO CHORAL PROFILE



June 2011

Choirs Ontario

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About Choirs Ontario

Choirs Ontario is a not-for-profit arts organization that has been providing leadership and service to Ontario's choral community since 1971. We foster a vibrant and inclusive choral community by providing resources, creating opportunities and engaging Ontario's diverse population in the transformative power of choral music. We believe that choral music enriches our lives and builds strong communities. We celebrate and support choral activity through several awards, including the Ruth Watson Henderson Choral Composition Competition, the Leslie Bell Prize for Choral Conductors and the Presidents' Leadership Award. Our membership is open to choirs, businesses, institutions and individuals.

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About the Association Resource Centre Inc.

The Association Resource Centre Inc. is a full-service management consulting firm that specializes in meeting the diverse needs of the not-for-profit sector. Through its Research and Strategy Division, the firm provides a broad range of research services to associations and to the members they serve. The Association Resource Centre's extensive background in governance, strategic planning and association research enables it to interpret the data it receives and to provide insightful analysis as to what the data means.

Disclaimer

Although the information in this report has been obtained from sources that the Association Resource Centre Inc. believes to be reliable, this report is based on survey responses of senior choir staff during the survey period of November 15, 2010 to November 30, 2010, as well as information collected in in-depth interviews in January 2010. Accordingly, its accuracy and completeness cannot be guaranteed. This report is for information purposes only. All opinions and estimates included in this report constitute the views of survey respondents and in-depth interview participants combined with our judgment as of this date and are subject to revision.

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EXECUTIVE SUMMARY

The goal of the 2011 Ontario Choral Profile Study is to provide information that will be used to help Ontario choirs to benchmark their performance against other similar organizations, as well as to help them to improve their performance and profile within their communities.

To fully address the objectives of the study, Choirs Ontario contracted the Association Resource Centre to carry out four distinct methodological components. These included: 10 in-depth interviews, a choir qualification survey, an internet survey of 186 Ontario choirs and omnibus completed by 654 members of the Ontario public.

Key choral community statistics:

- There are an **estimated 11,300 choirs in Ontario**. Fifty-eight percent (58%) of these are religious choirs, 31% are school choirs and 11% are community or professional choirs.
- Community choirs in Ontario generated an **estimated \$31.6 million in revenue** in 2010.
- There are approximately **1.9 million active choristers living in Ontario**, accounting for just under 15% of the population in the province or almost **1 in 7 Ontarians**. This estimate includes half a million youth under the age of 18.

The following outlines other key highlights from the report:

- The **bulk of choirs have been in existence for approximately 30 years**. A significant majority of respondents indicated that they represent **amateur choirs**.
- **Mixed voice and adult choirs** are far and away the most popular types of choirs among participants.
- On average, **two-thirds of participating choirs' choristers is female** while the **largest age groups are 51 to 65 (26%) and 36 to 50 (22%)**.
- **Just over half of choirs travel to perform**. One-third of travelling choirs indicated that they travel to the U.S. while almost half indicated that they travel internationally.
- Choirs in Ontario participated in an **average of 7.2 concerts** over the past 12 months. This consists, on average, of **4.4 concerts hosted by the choir itself and 2.9 concerts hosted by other choirs**.



- The **average annual attendance at choir performances is just under 1,300** with almost half garnering total attendance between 750 and 2,000.
- There is **a high degree of diversity** in the music that choirs sing. **Sacred and Classical top the list** with most choirs indicating that these types of music are part of their repertoire. It should be noted that the percent singing classical music may be overstated as the survey did not distinguish between classical music and music from the classical period.
- Nearly all of the choirs indicated that they have **at least some Canadian music** in their repertoire.
- While **purchasing** is by far the dominant way of obtaining new repertoire, choirs tend to use a variety of methods for obtaining new repertoire. **Renting and commissioning** are also quite common.
- Almost all choirs reported having at least one staff member. The **average staff complement for choirs in Ontario is 4.9 people**. While **most staff positions are occupied with volunteers**, positions including **conductor/artistic directors, accompanists and other artistic staff are often paid**.
- A significant majority of **choirs use volunteers for library administration, Board of Directors, finance and accounting, concert and event planning, on committees** and to a lesser extent for **marketing and communications and fundraising**.
- Choirs in Ontario rely primarily on **box office sales and membership fees for revenue**. Combined, these two items account for almost two thirds of choir revenues.
- Choirs receive an average of **12% of their funding from external sources** such as government, corporate and private foundations. **Only 10% have received federal government funding while a further 5% have applied (but not received)**.
- **Staffing salaries and professional fees are the most significant expenses** for choirs accounting on average for 50% (artistic, administration and other). **Production and programming expenses are also significant** at 22% of expenses.
- Although expressed as a concern in interviews, the overall level of **concern about the future sustainability of choirs in Ontario is fairly moderate** among participants with an average rating of only 3.6 out of a possible 7.
- While all 13 of the issues tested in the survey were considered important, the hot button issues are related to a sense that choral music is losing its impact in local communities across Ontario and in other parts of the country. The two issues in the **'critical' category are the decreased focus on choral music in the education system and decreased support of choral activities by the government**.

I. INTRODUCTION

Study Background

Recognizing the need for current data on the choral community, Choirs Ontario contracted the Association Resource Centre to conduct profiling, benchmarking and compensation research on choirs in Ontario. This study will be the first of its kind in Canada and will provide valuable information on the number and profile of Ontario choirs.

The goal of this research initiative is to provide information that will be used to help Ontario choirs to benchmark their performance against other similar organizations, as well as to help them to improve their performance and profile within their communities.

The following report outlines the results of an online survey conducted with 186 choirs from across Ontario.

Purpose and Objectives

The main purpose of this study was to obtain choral community data in order to develop a current profile of the sector in Ontario. The primary objectives of the research were to:

- ☐ Determine the profile of the choirs in Ontario;
- ☐ Identify the activities that choirs in Ontario participate in;
- ☐ Determine the structure of revenue and expenses;
- ☐ Gain an understanding of how choirs are staffed;
- ☐ Benchmark compensation for various staff members; and,
- ☐ Identify key trends and issues facing the choral community in Ontario.

Research Methodology

To fully address the objectives of the study, four distinct methodological components were undertaken:

- ☐ *In-Depth Interviews:* To ensure that the information collected through the study was relevant to Ontario choirs, a series of 10 in-depth interviews were conducted with leaders of choral organizations in Ontario. Interviewee candidates were randomly selected from a sample list of Choirs Ontario members. Participants subsequently participated in a 30 minute interview where they were asked for input on the information they would be interested in with regard to their choral organizations. Their input was used as the foundation for designing the study.
- ☐ *Choir Qualification Survey:* Lists of schools and religious organizations in Ontario were compiled using various online directories. From each of these lists, 500 records were selected at random to be called to determine if the organization had a choir. A choir was defined as an organized group of 12 or more choristers. The results were used to estimate the number of school and religious choirs in Ontario.

- ☐ *Internet Survey:* The Association Resource Centre Inc. conducted 186 surveys with Ontario choral organizations in November 2010. Each survey took approximately 18 minutes to complete. The data has not been weighted as there is no population data with which to weight. The survey was focused on professional and community choirs. With a few exceptions, school choirs and religious choirs were not included in the survey.
- ☐ *Omnibus Survey:* Two questions were included on a telephone omnibus survey in Ontario in October 2010 to determine the number of choristers per household. The omnibus survey was conducted by telephone using random digit dialling. A total of 654 omnibus surveys were completed. Results from the omnibus survey are weighted to the Ontario population to ensure representativeness.

Study Limitations

When interpreting results from this study, it is important to keep in mind the following limitations:

- ☐ Ensuring results that are truly representative of the actual population is only possible through true random probability sampling. Given that no comprehensive “list” of choirs is available, random probability sampling was not possible for this study. Because the survey was not random, the results may or may not be an accurate representation of the total choir population. Accordingly, the findings in this report represent the views of the choirs who were surveyed.
- ☐ As no reference sample for the choral community is available, the results in this report have not been weighted.
- ☐ The survey was conducted primarily with community choirs. The survey did include select school and worship choirs where the choral program was more than an extracurricular program or service accompaniment. Accordingly, the choral organization profile should be viewed as representing the community choir sector.
- ☐ The number of choirs was determined using the incidence of choirs in churches, synagogues and schools from a random survey of each of these groups as well as community and professional choirs found in an inventory process. The school incidence was applied to the number of schools in the Ontario Ministry of Education database. The church incidence was applied to the number of Ontario churches in a comprehensive database of Canadian churches (www.churchmap.ca). The synagogue incidence was applied the number of Ontario synagogues listed on the Canadian Jewish Congress website. Each of the sources used is believed to under represent the actual number organizations. Accordingly, the estimate of choirs should be viewed as a conservative estimate.
- ☐ Community averages and estimates (including revenue, employment, number of chorister, compensation, etc.) as well as other data were based on survey responses and are only as accurate as the data provided by survey respondents.

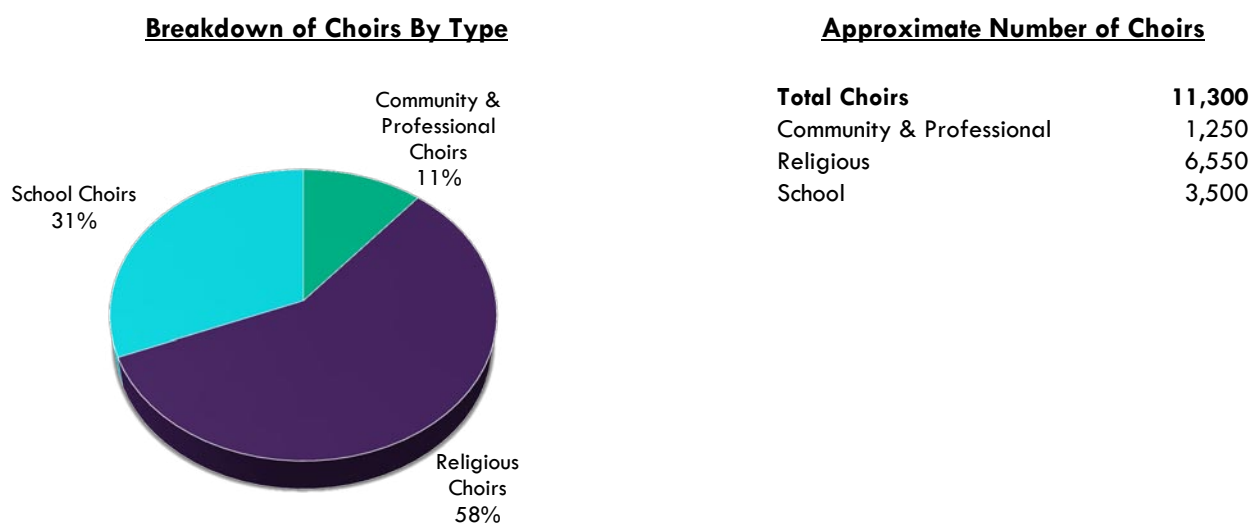
II. SIZE OF THE CHORAL COMMUNITY IN ONTARIO

The best way to determine the health of the choral community is to measure its size and growth. This chapter looks at size of the community in terms of the number of choirs and choristers in Ontario. It is not possible to measure growth at this time as there are no previous benchmarks against which to compare. Accordingly, the numbers presented here will serve as the baseline going forward.

Number of Choirs

As shown in **Exhibit 2-1**, there are an estimated 11,300 choirs in Ontario. The largest portion of these is religious choirs (58%). As mentioned in the study limitations section, these estimates should be viewed as conservative as the sources used to calculate them are believed to under represent the actual community. It should also be noted that in the surveys with schools and religious organizations, the definition of a choir was an organized group with twelve or more choristers. Accordingly, smaller groups or those not formally organized are not counted.

Exhibit 2-1: Number and Breakdown of Choirs

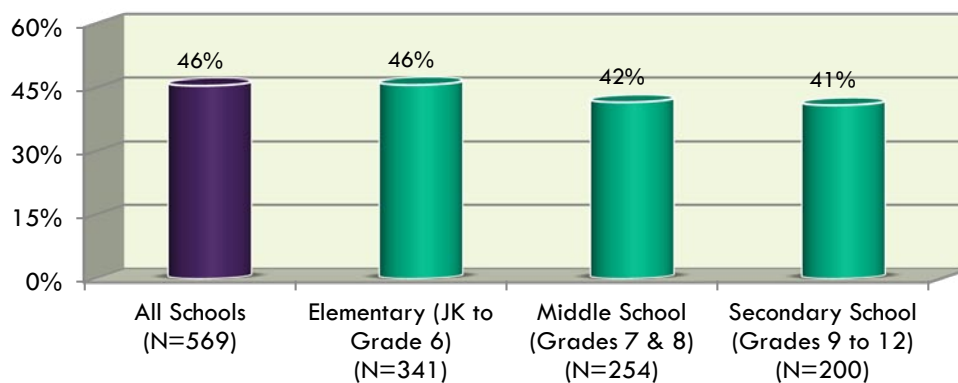


Note: Estimates are, by nature, subject to error. As discussed in the study limitations, these estimates should be viewed as conservative. The estimates represent the number of choirs rather than choral organizations. One organization may have multiple choirs.



The mini survey of schools revealed that 46% of Ontario schools have at least one choir. The portion of schools offering choirs by age group decreases slightly from 46% among elementary programs to 41% among secondary programs. The portion of schools with choirs is shown in **Exhibit 2-2**.

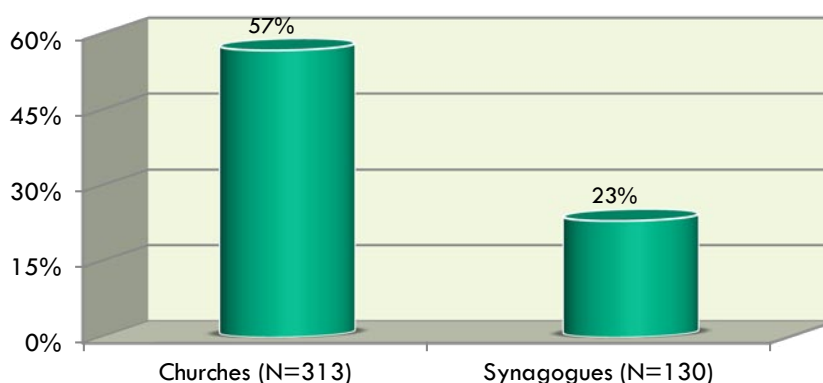
Exhibit 2-2: Percent of Schools With Choirs



Note: Base for the different school levels is schools catering to that age group.

A brief survey of religious organizations revealed the over half (57%) of Christian churches and almost one-quarter (23%) of Jewish synagogues have choirs (see **Exhibit 2-3**). The survey also covered a handful of other types of religious organizations, but none were found to have choirs.

Exhibit 2-3: Percent of Churches and Synagogues With Choirs



Choir Community Revenue

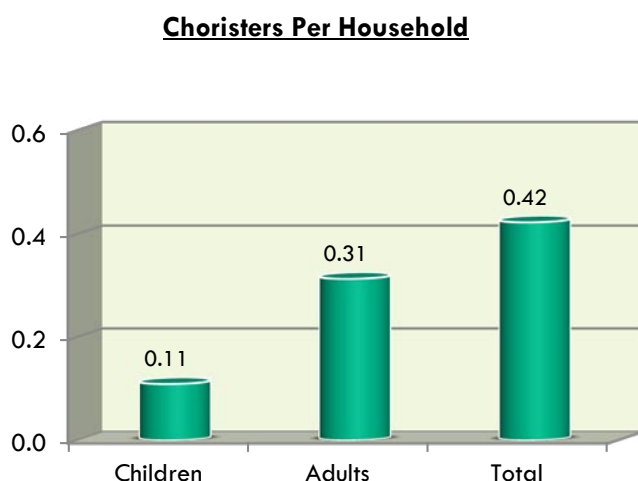
As presented later in this report, the average revenue per community choir organization in Ontario is \$82,000 while the median is \$32,000. To provide an idea of the total revenue generated by community choirs in Ontario, the survey distribution of choral revenues was applied to the 542 choral organizations (representing 1,250 choirs) in the inventory developed for this project to derive a conservative estimate. The conservative estimate of total choral revenues in Ontario for 2010 is approximately \$31.6 million. As explained in the study limitations, this estimate excludes the vast majority of school and worship choirs.



Number of Choristers

There are approximately 1.9 million active choristers living in Ontario (see [Exhibit 2-4](#)). This consists of 1.4 million adult choristers (18 and older) and 500,000 choristers aged 17 and under. Overall, this translates to approximately 0.42 choristers per household in Ontario or just under 15% of all Ontarians. It should be noted that the questions about choir participation did not specify that a choir was to have at least twelve choristers. Accordingly, some choristers may sing in groups of less than twelve.

Exhibit 2-4: Number of Choristers



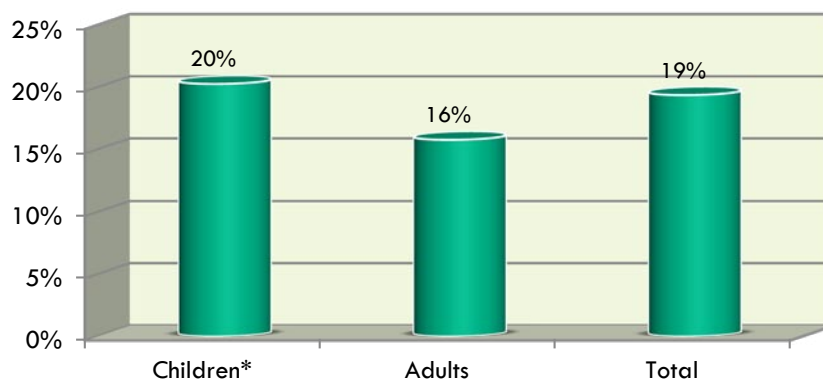
Approximate Number of Choristers

Total Choristers	1,927,000
Adult	1,427,000
Children	500,000

Note: N=654

As seen in **Exhibit 2-5**, there is at least one chorister in one out of every five (19%) households in Ontario. Roughly 16% have at least one adult chorister and 20% of households with children in them have at least one child (under 18) chorister.

Exhibit 2-5: Percent of Households With Choristers



Notes: *Base for Children is households with children in them (N=180).
Adult and Total N=579

III. RESPONDENT PROFILE: WHO ARE THEY?

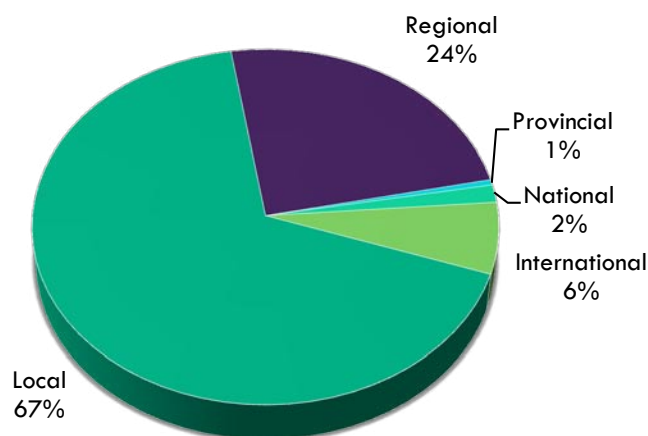
This chapter presents a profile of the choirs that participated in the survey. These results are intended to provide context in which to view the results in the rest of the report.

General Profile

This section provides an overview of the demographics of the choirs that participated in the study.

As seen in **Exhibit 3-1**, the vast majority of choirs in Ontario have a relatively small jurisdiction. More specifically, two-thirds (67%) are local while a further quarter (24%) are regional. Seven percent (6%) were international choirs.

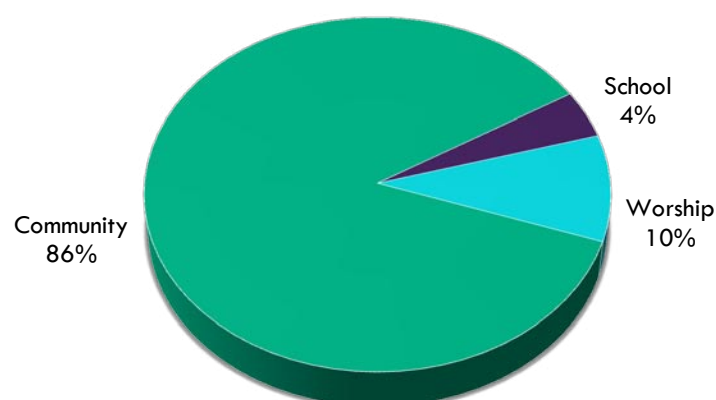
Exhibit 3-1: Choir Jurisdiction



Note: N=186

Most (86%) choirs that participated in the study were community choirs (see **Exhibit 3-2**). It should be noted that this is in part a result of the sample that was available to conduct the survey with. In addition, the focus of the choral profile is on choral organizations. As the majority of school choirs are extracurricular programs and most worship choirs serve as support to religious proceedings, most of these don't give formal concerts and/or collect revenues. Those that do were included in the survey.

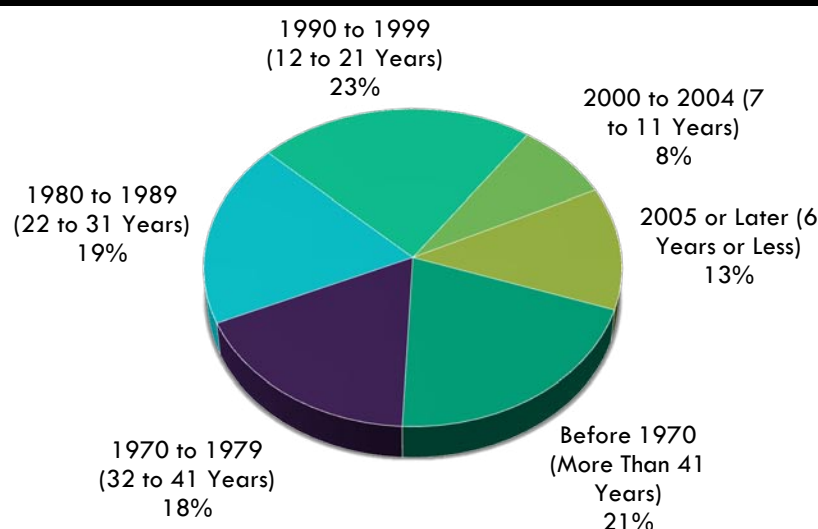
Exhibit 3-2: Choir Type



Note: N=186

On average, the choirs in the study have been established for 30 years. Interestingly, the year established is fairly evenly spread out with roughly one fifth being established in each of the ten year groupings from 1970 to the present. A further fifth (21%) were established prior to 1970. The results suggest that there has been steady growth in the number of choirs in Ontario for quite some time. The year of establishment is shown in **Exhibit 3-3**.

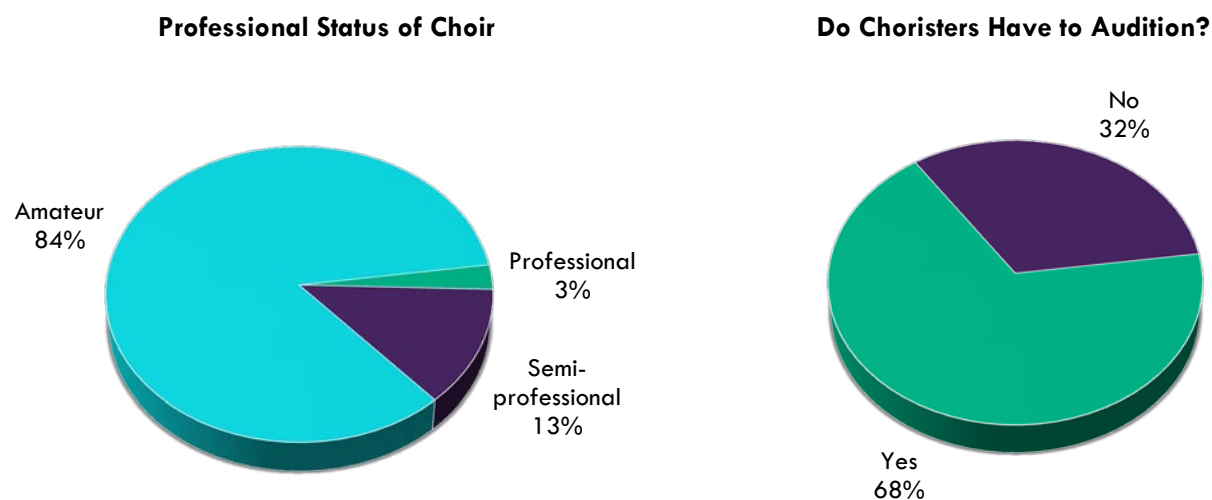
Exhibit 3-3: Year Established



Notes: Responses may not sum to 100% due to rounding.
N=176, mean = 1981 (30 years old)

A significant majority (84%) of respondents indicated that they represent amateur choirs (see **Exhibit 3-4**). Only 3% reported being completely professional. When asked if choristers had to audition to be part of the choir, just over two-thirds (68%) indicated that they did.

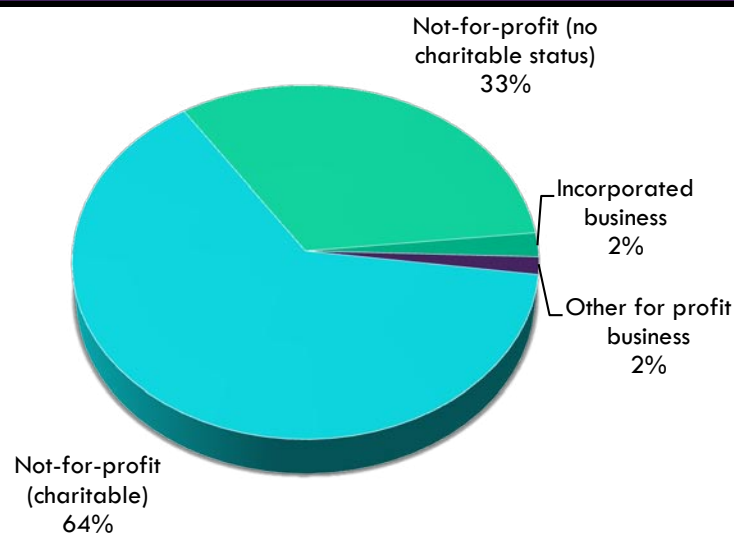
Exhibit 3-4: Professional and Audition Status



Note: N=186

As shown in **Exhibit 3-5**, an overwhelming 97% of choirs in Ontario are not-for-profit organizations. The majority of these (64%) are registered charities.

Exhibit 3-5: Business Model

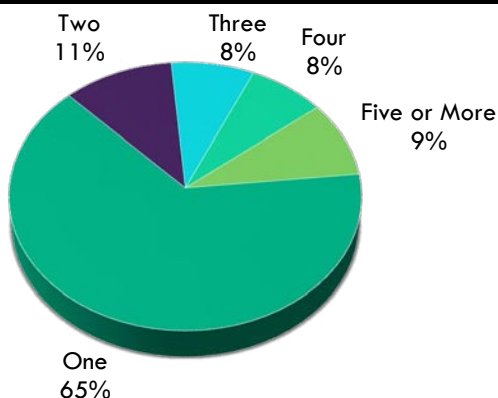


Notes: Responses may not sum to 100% due to rounding.
N=184

Chorister Profile

Two-thirds (65%) of the choral organizations surveyed indicated that they have only one choir while 9% have five or more. The average number of choirs per respondent is 3.3. This average however is skewed by a small number of very large choral organizations. According, the median (which represents the midpoint where 50% of organizations are below and 50% are above) is perhaps a better indicator of the typical number of choirs per organization. The median number of choirs is 1. Results are presented in **Exhibit 3-6**.

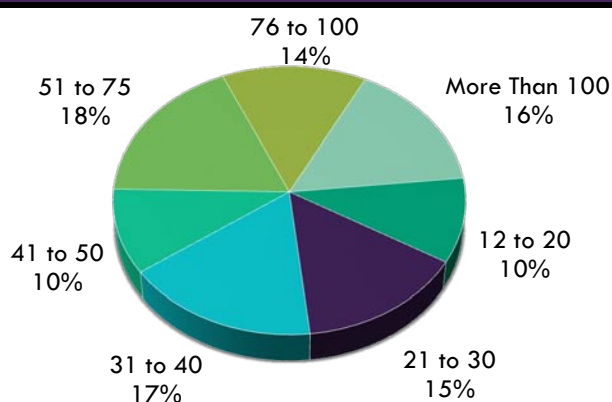
Exhibit 3-6: Number of Choirs in the Organization



Notes: Responses may not sum to 100% due to rounding.
N=186, mean=3.3, median = 1

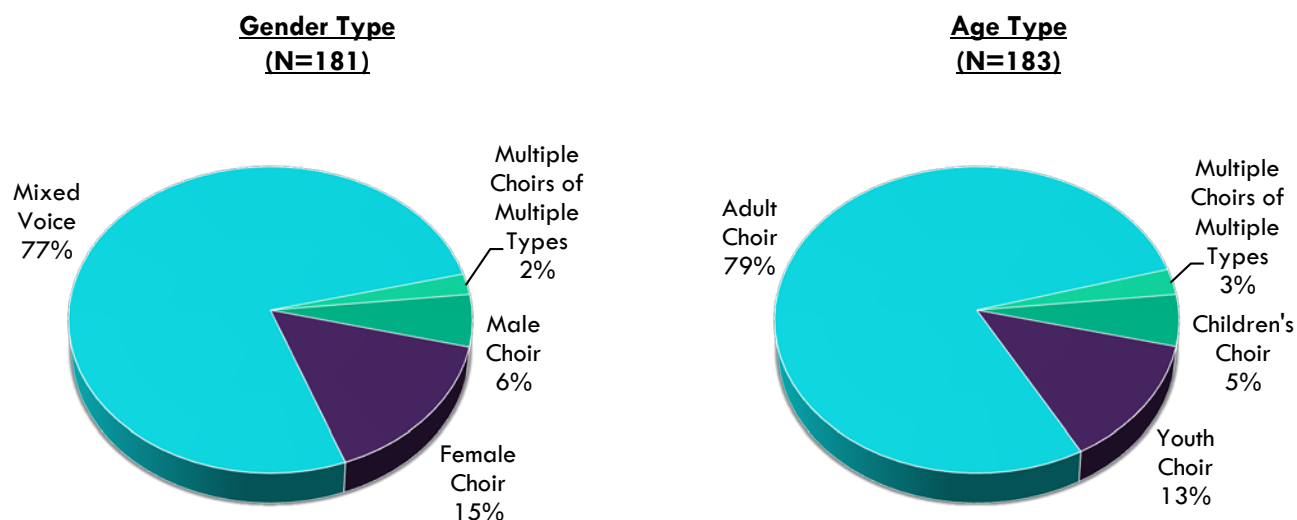
There is a wide range of choir sizes within the community. As seen in **Exhibit 3-7**, the number of choristers per choir is fairly well spread out. The average number of choristers is 81. Again, due to a handful of large organizations, the median is perhaps a better indicator of the number of choristers in the typical choir. The median number of choristers is 50.

Exhibit 3-7: Number of Choristers



Notes: Responses may not sum to 100% due to rounding.
N=177, mean=80.9, median=50

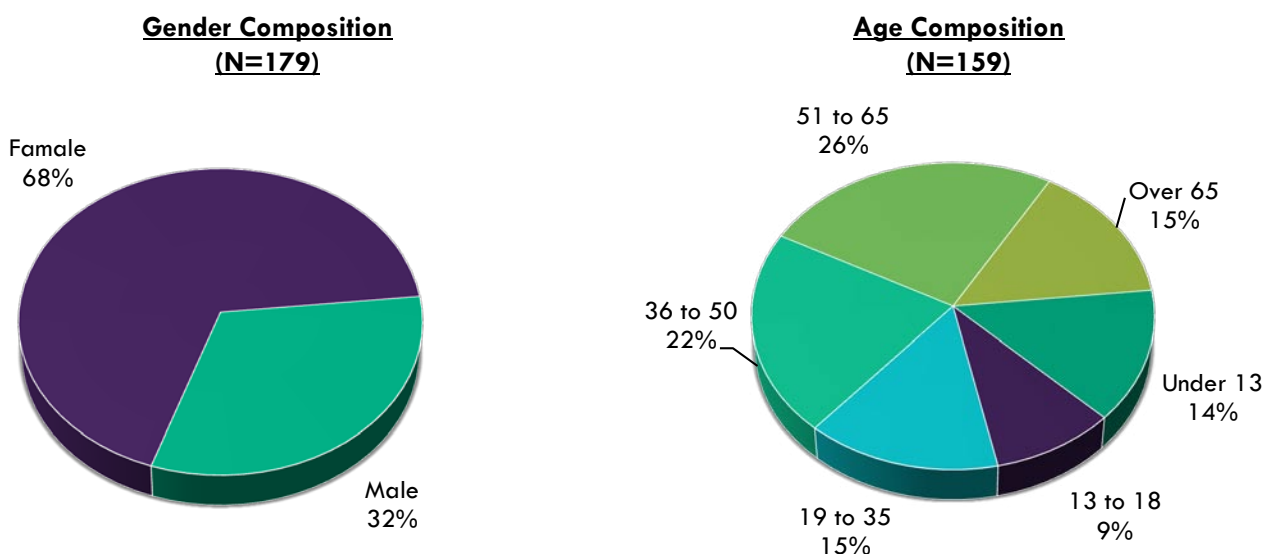
Mixed voice (77%) and adult (79%) choirs are far and away the most prevalent types of choirs among participants. In terms of gender specific choirs, respondents were more than twice as likely to represent a female choir (15%) than a male (6%) choir. Similarly, there are more than twice as many youth choirs (13%) than children's choirs (5%) among respondents. Type of choir by gender and age is summarized in **Exhibit 3-8**.

Exhibit 3-8: Type of Choir

Note: Responses may not sum to 100% due to rounding.

Each choir has its own unique composition in terms of age and gender of choristers. **Exhibit 3-9** presents the “average” composition as a benchmark. On average, two-thirds (68%) of a choir’s choristers are female while the largest age groups are 51 to 65 (26%) and 36 to 50 (22%).

Exhibit 3-9: Chorister Composition



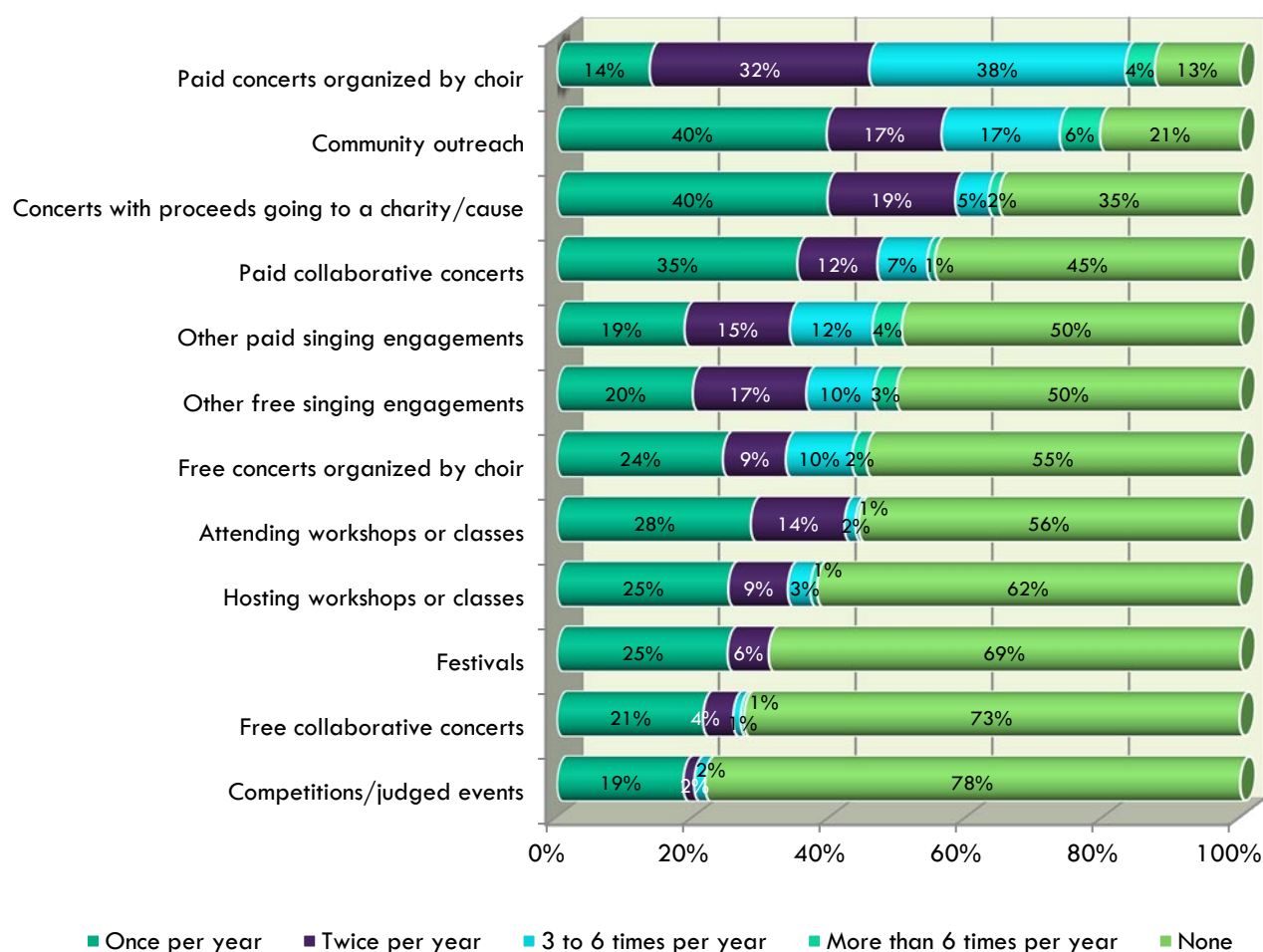
Notes: Responses may not sum to 100% due to rounding.
Percentages represent the average portion of choristers.



Activities

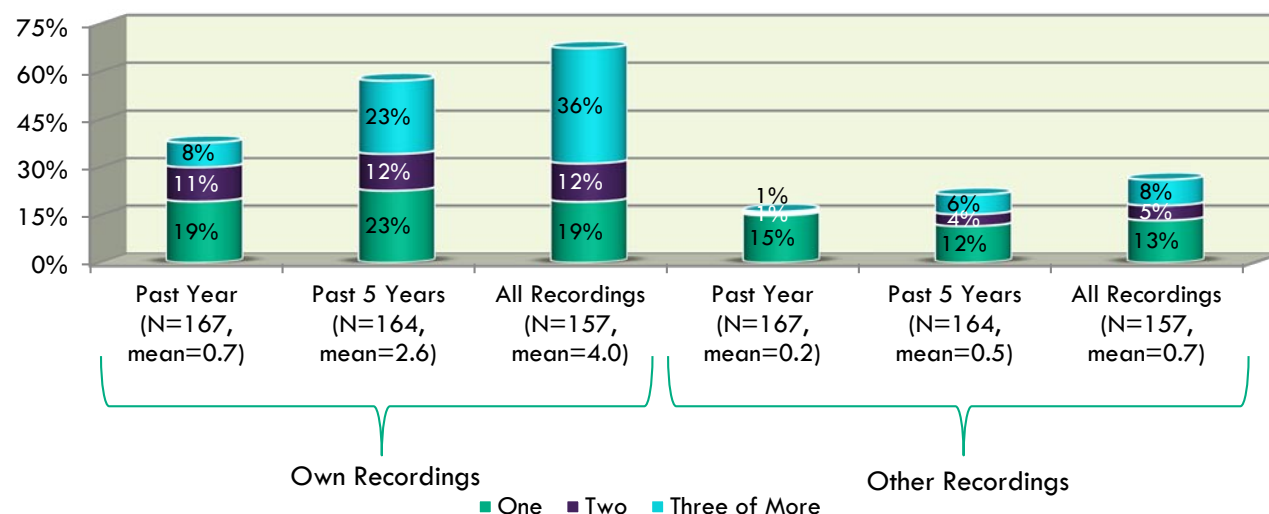
Exhibit 3-10 provides a summary of the frequency that choirs participate in different activities throughout the year. The vast majority (88%) organize and participate in paid concerts with most doing so two to six times per year. Four in five (80%) indicated that they participate in community outreach at least once per year. Other popular activities include concerts for charity (66%), paid collaborative concerts (55%), other paid singing engagements (50%) and other free singing engagements (50%). All of these activities are participated in by more than half of all choirs.

Exhibit 3-10: Frequency of Participation in Select Choral Activities



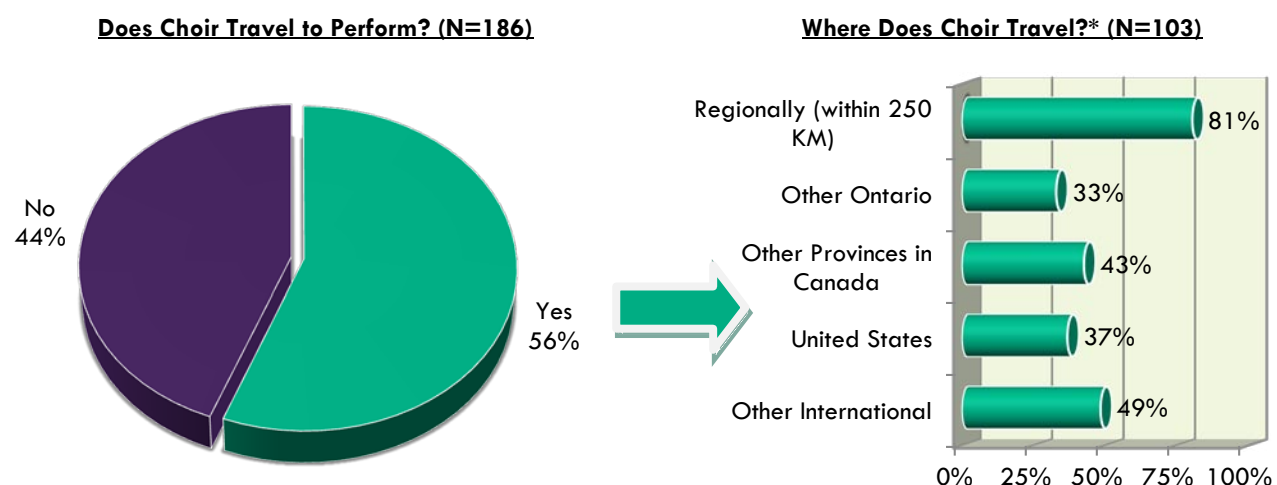
Notes: Responses may not sum to 100% due to rounding.
N=185

Two-thirds (67%) of respondents indicated that their choir has ever produced a recording of their own (see **Exhibit 3-11**). Further, 38% have produced a recording in the past year and 58% have in the past five years. In terms of recordings with other choirs, one-quarter (26%) of respondents indicated that their choir has ever produced a recording. Further, 17% have produced one in the past year and 22% have in the past five years.

Exhibit 3-11: Number of Recordings


Notes: N=164

As presented in **Exhibit 3-12**, just over half (56%) of choirs travel to perform. Among those who do travel, most (81%) travel regionally within 250 KM. Travel outside the region also appears to be quite common. In fact, one-third (37%) of travelling choirs indicated that they travel to the U.S. while almost half (49%) indicated that they travel internationally (does not include the U.S.).

Exhibit 3-12: Choral Travel


Notes: Base for where the choir travels is choirs who travel to perform.

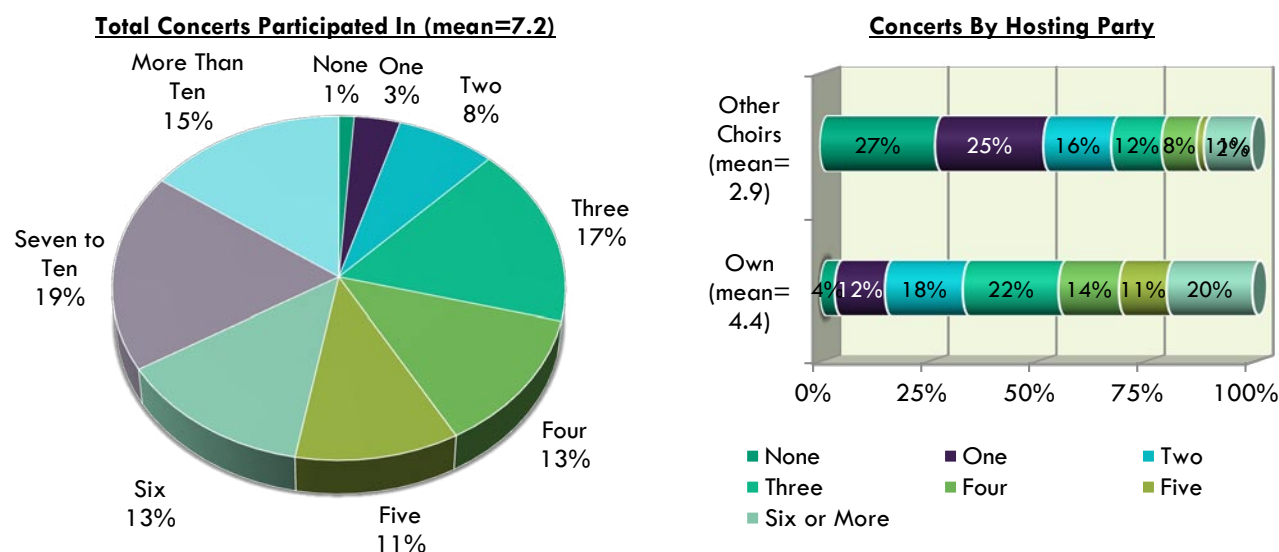
*Percents add to more than 100% due to multiple responses.

Concerts and Attendance

Choirs in Ontario participated in an average of 7.2 concerts over the past 12 months. This consists, on average, of 4.4 concerts hosted by the choir itself and 2.9 concerts hosted by other choirs. The number of concerts participated in over the past twelve months is presented in **Exhibit 3-13**. The number of concerts (in total) tends to be higher among professional choirs as well as youth/children's choirs.

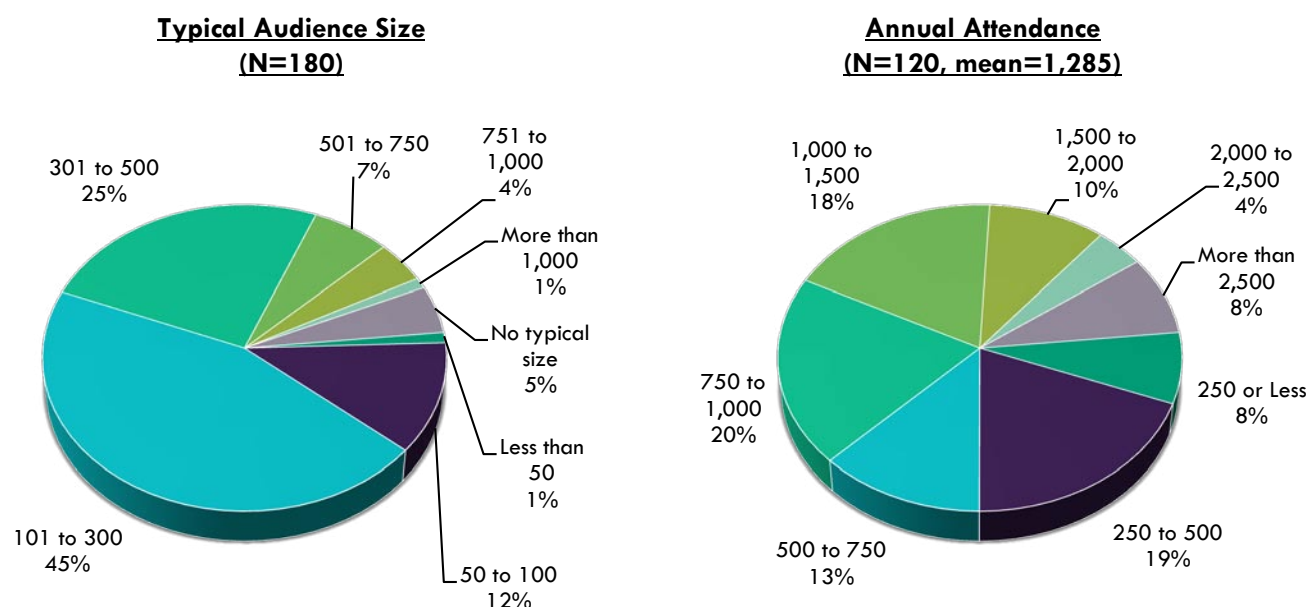
A look at the breakdown of the number of concerts shows that over half (54%) of choirs participated in three to six concerts in the last twelve months. The vast majority of choirs host four or fewer concerts per year (70%) and participate in three or fewer concerts hosted by others (80%).

Exhibit 3-13: Number of Concerts in Past 12 Months



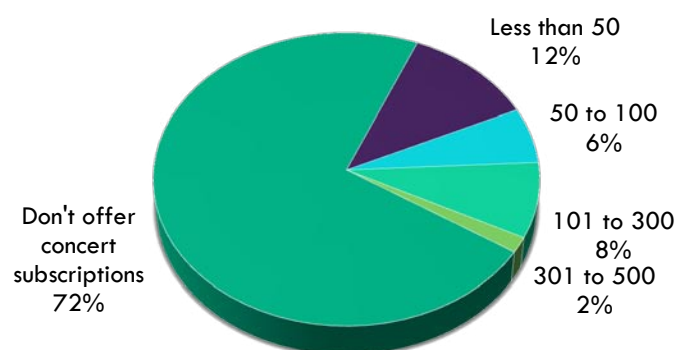
Notes: Responses may not sum to 100% due to rounding.
N=172

The average annual attendance at choir performances is just under 1,300 with almost half (48%) garnering total attendance between 750 and 2,000. On a per concert basis, choirs tend to be in the 101 to 300 range (45%) or the 301 to 500 (25%) range. Combined, these two audience size categories account for 70% of choirs. Concert audience size and annual attendance is summarized in **Exhibit 3-14**. Respondents were also asked about trends related to concert attendance. These are presented in **Chapter VI: Trends and Challenges**.

Exhibit 3-14: Concert Attendance


Notes: Responses may not sum to 100% due to rounding.
N=184

As seen in **Exhibit 3-15**, only 28% of choirs offer subscriptions. Among those who do, the majority have less than 100 subscriptions.

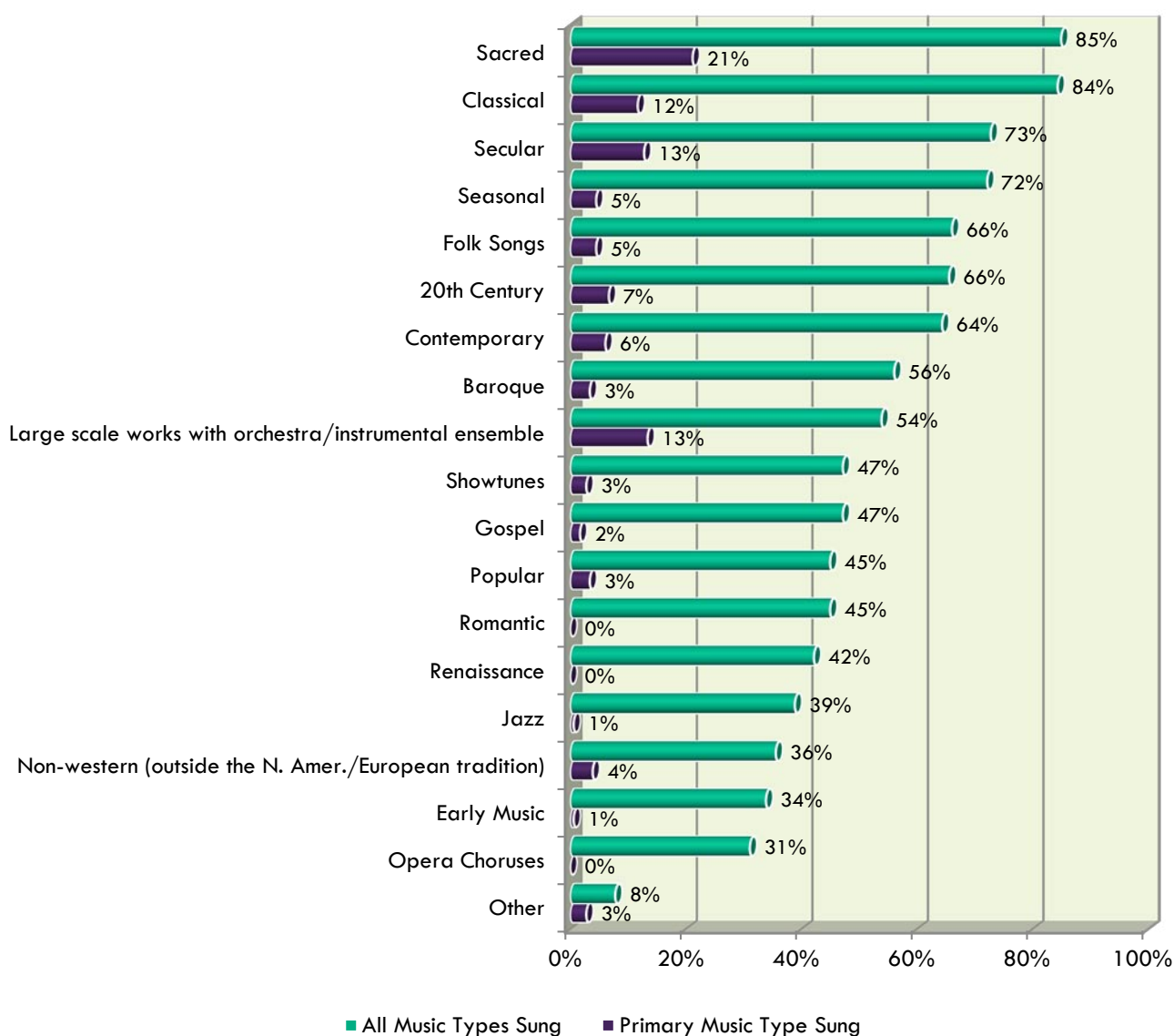
Exhibit 3-15: Number of Subscribers


Note: N=180

Music Selection

Exhibit 3-16 shows the types of music sung by choirs in Ontario. Results are shown for all types of music sung and the primary type of music sung. On average, choirs in Ontario have 10 different types of music in their repertoire. Only a handful (16%) has a repertoire of five music types or less. In other words, there is a high degree of diversity in the music that choirs sing.

Exhibit 3-16: Types of Music Sung



Notes: Responses for "All Types of Music Sung" sums to more than 100% due to multiple responses.
N=180

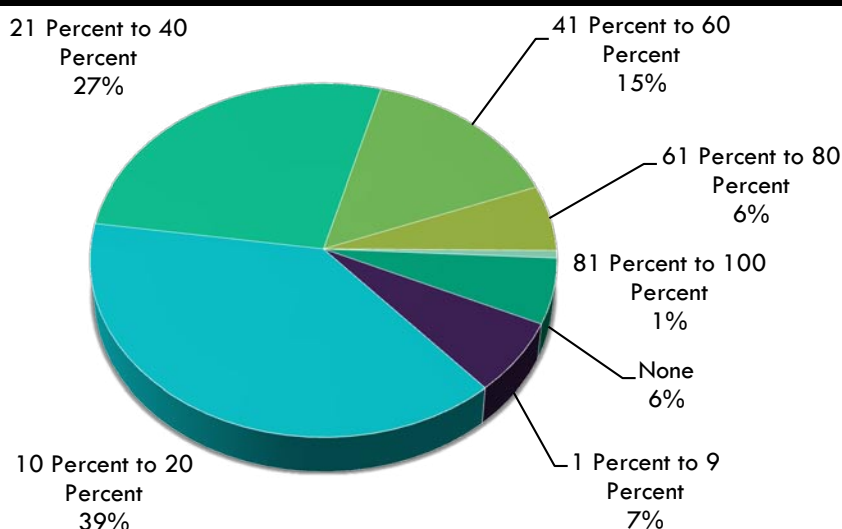


When looking at all music types sung, results show that sacred and classical top the list with most choirs indicating that they are part of their repertoire (85% and 84%, respectively). Secular (73%) and seasonal (72%) are the next most common followed by folk songs (66%), 20th century (66%) and contemporary (64%). All of these types of music are in the repertoires of two-thirds of Ontario choirs or more. When asked to identify the primary type of music, the order of the top music types change. Sacred is still the clear front runner at 21% of choirs. However, secular (13%) and large scale works with

orchestra/instrumental ensemble (13%) are tied for second while classical is a close fourth at 12%. What is particularly interesting about this result is that large scale works was ranked ninth in overall popularity but second as a primary music type. In other words, compared to other music types, those who have this type of music in their repertoire are more likely to have it as the primary type. It should be noted that the percent singing classical music may be overstated as the survey did not distinguish between classical music and music from the classical period.

Given that government grants often encourage some Canadian content, it is not surprising that most choirs (94%) indicated that they have at least some Canadian music in their repertoire. For 39% of choirs, the portion of Canadian music is 10% to 20% of their repertoire while a further 27% are between 21% and 40%. Only 6% reported a percentage higher than 60%. The average Canadian content across all choirs is 28% of their repertoire. A summary of the amount of Canadian content used by choirs is presented in **Exhibit 3-17**.

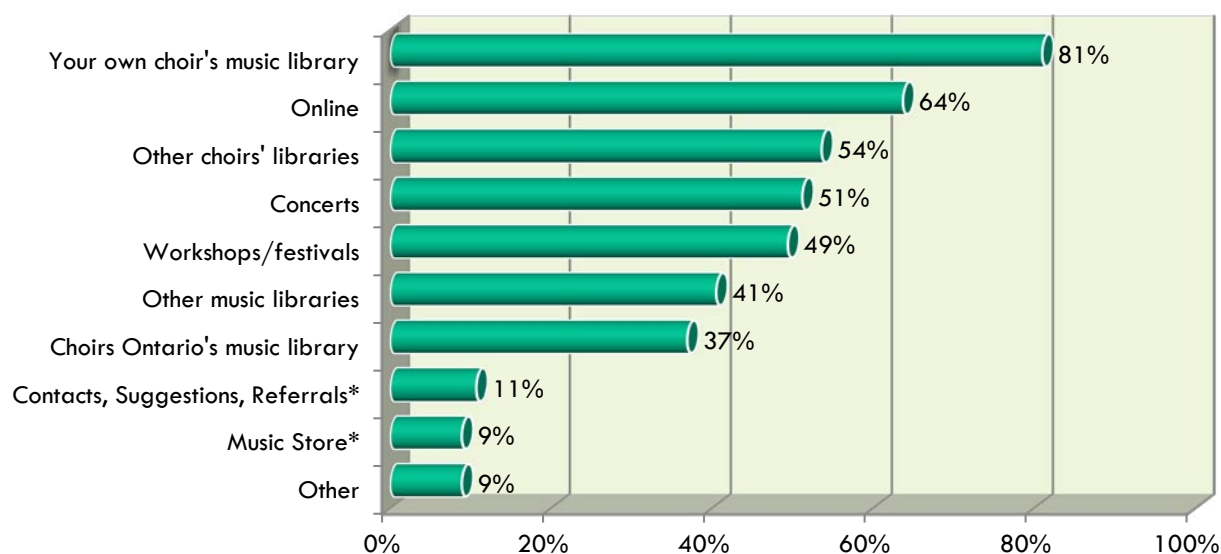
Exhibit 3-17: Canadian Content



Notes: Responses may not sum to 100% due to rounding.
N=134, mean=28%

Choirs are clearly relying on multiple sources for identifying new repertoire. The most popular source is the choir's own library. Four in five (81%) respondents identified this as a source for new repertoire. With almost two-thirds (64%) identifying it, online is also a key source. Other choir libraries (54%), concerts (51%) and workshops/festivals (49%) were also identified as sources by approximately half of respondents. Findings on where choirs look for new repertoire are presented in **Exhibit 3-18**.

Exhibit 3-18: Where Choirs Go For New Repertoire



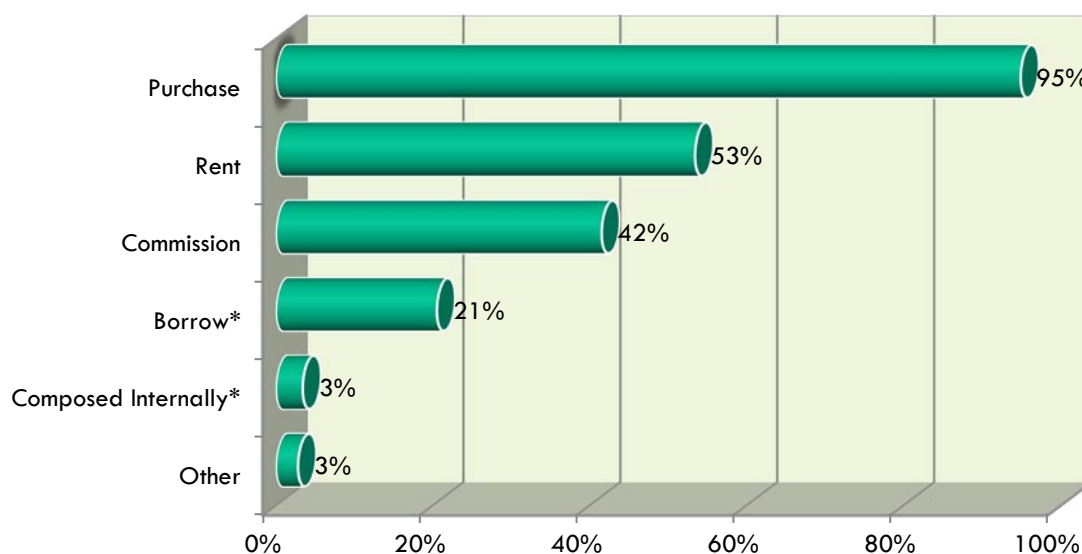
Notes: Percentages sum to more than 100% due to multiple responses.

*These items were provided as open ended responses. They were not listed as options in the survey.

N=168

While purchasing is by far the dominant way of obtaining new repertoire, choirs tend to use a variety of methods for obtaining new repertoire. Ninety-five percent (95%) of respondents indicated that they used this method of obtaining new music (see **Exhibit 3-19**). Renting (53%) and commissioning (42%) are also quite common. It is also worth pointing out that while only 21% indicated that they borrowed music, this option was provided as an open end response (it was not listed as a choice in the question). With that in mind, the actual percent may be considerably higher.

Exhibit 3-19: How New Repertoire is Obtained



Notes: Percentages sum to more than 100% due to multiple responses.

*These items were provided as open ended responses. They were not listed as options in the survey.

N=176

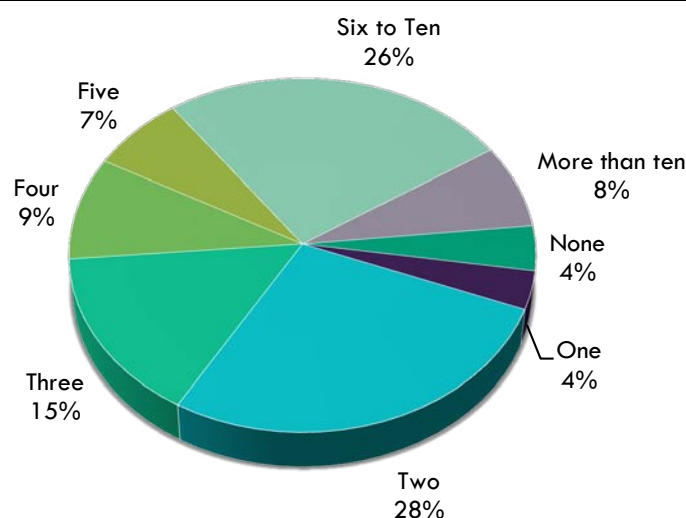
IV. ADMINISTRATION AND LEADERSHIP

How are choirs in Ontario staffed? How much are staff members paid? How do choirs use their volunteers? These are the questions that are answered in this chapter.

Number of Staff

Almost all (96%) choirs reported having at least one staff member (artistic or administrative). This may be paid staff or volunteer staff. The average staff complement for choirs in Ontario is 4.9 people with two-thirds (67%) having a staff of five or less (see [Exhibit 4-1](#)). A significant quarter (26%) has a staff of six to ten. Interestingly, there isn't a significant variance in the average number of staff between professional (5.8) and amateur (4.7) choirs. Not surprisingly, those organizations with multiple choirs have slightly higher staffing levels (6.0) than those with only one choir (4.2).

Exhibit 4-1: Number of Staff

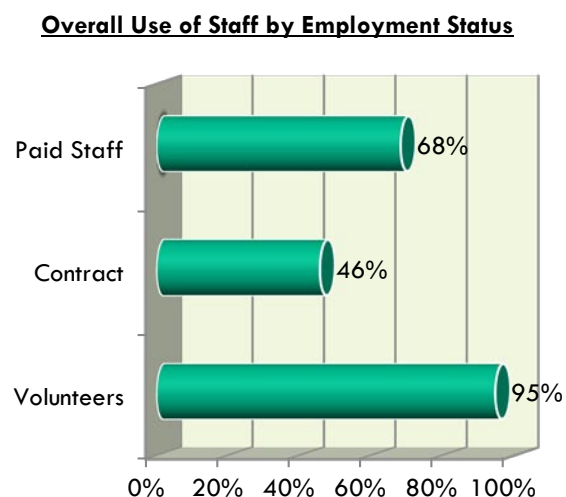
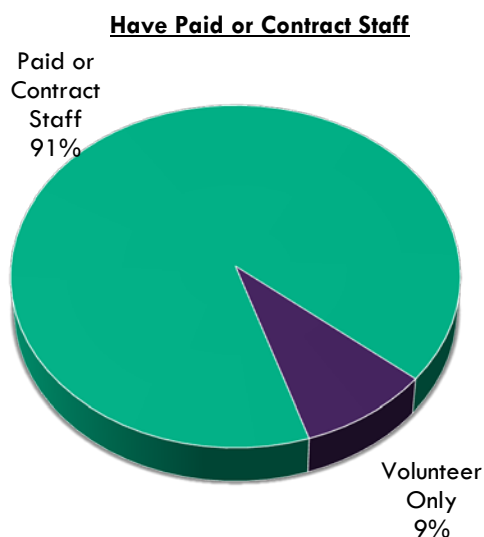


Notes: Responses may not sum to 100% due to rounding.
N=171, mean=4.9

Choir Staffing

Ninety-one percent (91%) of choirs indicated that they had at least one paid employee (including those on contract) while 9% were strictly volunteer based. A closer look shows that over two thirds (68%) have at least one paid employee while almost half (46%) have at least one contract position. Almost all (95%) choirs use volunteers in at least one of their key positions. These results are illustrated in **Exhibit 4-2**.

Exhibit 4-2: Overall Staff of Key Positions by Employment Status

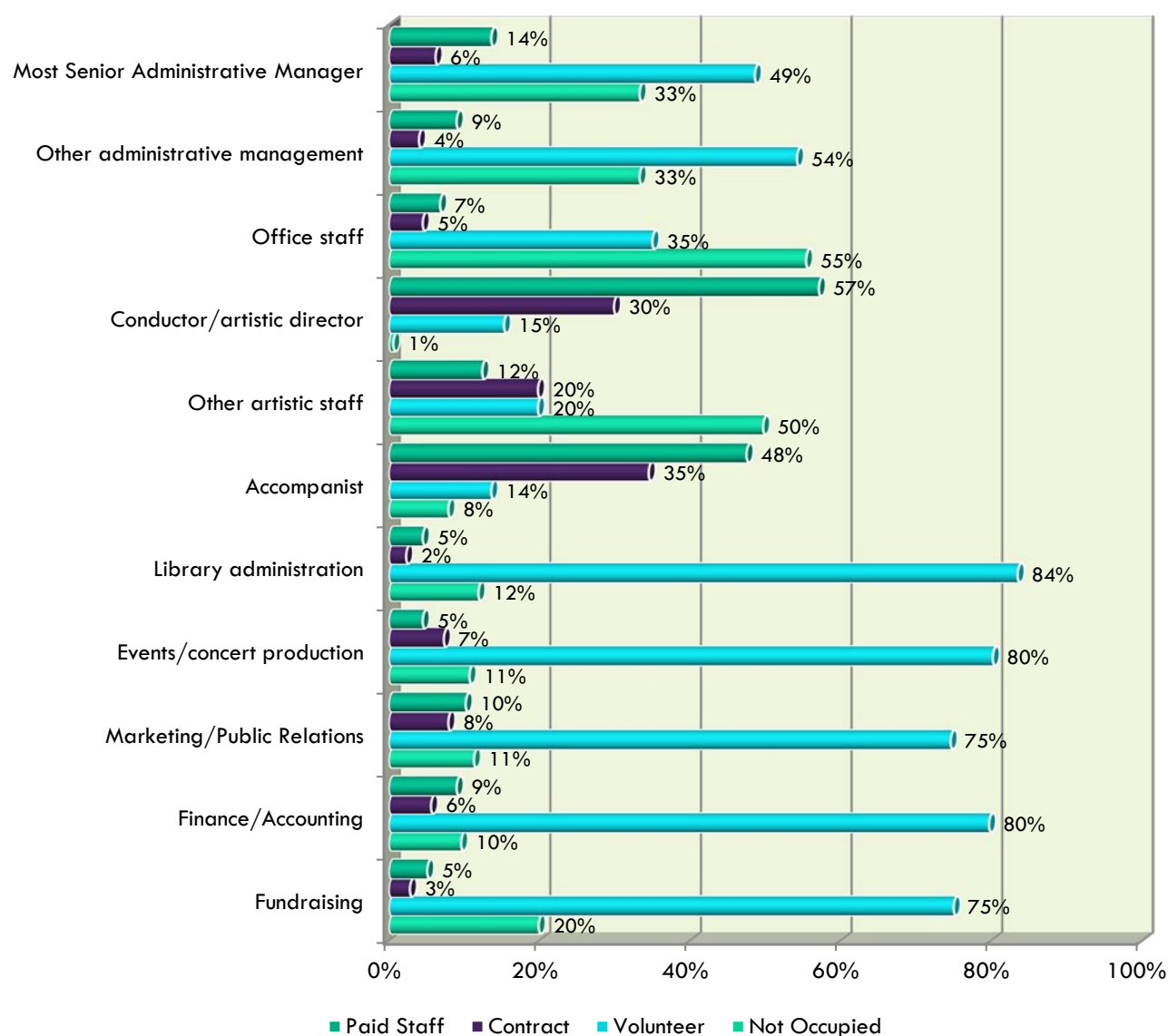


Notes: N=177

With a few exceptions, if a choir has a particular staff position, it is predominantly occupied by volunteers (see **Exhibit 4-3**). This is particularly true in the positions of library administration (84%), events/concert production (80%), marketing/public relations (75%), finance/accounting (80%) and fundraising (75%). The two key exceptions are the positions of conductor/artistic director (57% paid staff, 30% contract) and accompanist (48% paid staff, 35% contract). Other artistic staff is also an exception to the rule. These findings truly emphasize the non-profit nature of these organizations.

Positions that are less likely to be staffed at all include office staff (55% have no office staff), other administrative management (33%) and other administrative management (33%).

Exhibit 4-3: Position Staffing by Status



Notes: Percentages for each position sum to more than 100% due to multiple responses.

Paid staff are full or part time employees who receive a wage or salary for work done. People on contract are not employees of the choir, but provide their services for an agreed upon fee which may be a fixed sum or an amount per hour worked. Volunteers perform services for the choir but are not compensated for their work.

N=177

Compensation

Respondents were asked to provide annual or hourly compensation for full-time, part-time and contract staff. Hourly and part time compensation was then annualized for comparison with annual salaries.

Exhibit 4-4 presents average compensation in both hourly and annualized format for eight positions. Compensation is shown both overall and by employment status. Figures should be interpreted with caution due to small sample sizes. Compensation is not shown for groups with less than 5 respondents. The group headings are designed as follows:

- ☐ **Full-Time Employees:** Persons employed by the choir on a permanent basis working 35 hours per week or more.
- ☐ **Part-Time Employees:** Persons employed by the choir working less than 35 per week. Part-time include permanent part-time, casual part-time and seasonal staff.
- ☐ **Contract:** Person performing staff functions for the choir for an agreed upon fixed or hourly fee, but who are not employees (i.e., the choir does not pay employer taxes).
- ☐ **All Staff:** Is the combined average of the three groups listed above.

As noted in the previous section, many positions within choirs are predominantly staffed by volunteers. Compensation was only provided by organizations with paid staff in the position. Accordingly, compensation for some positions was only provided by a handful of organizations and values should be interpreted with caution.

Exhibit 4-4: Compensation

	Full-Time Employee			Part-Time Employee			Contract			All Staff		
	Annual	HR	N	Annual	HR	N	Annual	HR	N	Annual	HR	N
Most Senior Administrative Manager	\$54,349	\$27	8	\$42,186	\$21	8	\$53,929	\$27	7	\$49,991	\$25	23
Other administrative management	N/A			N/A			N/A			\$40,641	\$20	10
Office staff	N/A			N/A			\$36,417	\$18	6	\$37,078	\$19	10
Conductor/artistic director	\$49,114	\$25	10	\$73,482	\$37	47	\$87,892	\$44	52	\$78,121	\$39	109
Other artistic staff	N/A			\$123,531	\$62	6	\$68,174	\$34	21	\$78,201	\$39	29
Accompanist	N/A			\$65,066	\$33	34	\$85,498	\$43	64	\$78,244	\$39	99
Marketing/Public Relations	N/A			N/A			\$61,856	\$31	5	\$58,800	\$29	8
Finance/Accounting	N/A			\$37,040	\$19	5	\$76,700	\$38	5	\$56,870	\$28	10

Notes: Part time and contract wages/fees have been converted to annualized equivalents based on 40 hours per week for 50 weeks per years for comparison purposes. Annual amounts were converted to hourly rates based on 2000 available work hours per year.

N refers to the number of organizations reporting for a position.

NOTE: Many positions in the sector are part time. To calculate a “total actual compensation” amount or benchmark, multiply the hourly rate by the total number of hours worked. Alternatively, you can just compare the hourly rates.

Exhibit 4-5 presents the quartile ranges for staff levels where there were more than 20 respondents. Quartiles are provided for both annualized compensation and hourly compensation. The quartile ranges divide respondents into four equal groups (i.e., 25% fall into each group). This provides an understanding of the distribution of compensation. It should be noted that due to the nature of the sector, some wages are particularly low or particularly high when converted to hourly from annual or vice versa.

Exhibit 4-5: Compensation Quartiles

		1 st Quartile	2 nd Quartile	3 rd Quartile	4 th Quartile
Most Senior Administrative Manager	Annual	\$19,200 to \$34,091	\$34,091 to \$43,478	\$43,478 to \$47,840	\$47,840 to \$150,000
	Hourly	\$9.60 to \$17.05	\$17.05 to \$21.74	\$21.74 to \$23.92	\$23.92 to \$75.00
Conductor/artistic director	Annual	\$6,410 to \$40,000	\$40,000 to \$57,143	\$57,143 to \$100,000	\$100,000 to \$284,091
	Hourly	\$3.21 to \$20.00	\$20.00 to \$28.57	\$28.57 to \$50.00	\$50.00 to \$142.05
Other artistic staff	Annual	\$9,375 to \$29,871	\$29,871 to \$45,108	\$45,108 to \$104,572	\$104,572 to \$333,333
	Hourly	\$4.69 to \$14.94	\$14.94 to \$22.55	\$22.55 to \$52.29	\$52.29 to \$166.67
Accompanist	Annual	\$6,579 to \$50,000	\$50,000 to \$70,000	\$70,000 to \$100,000	\$100,000 to \$300,000
	Hourly	\$3.29 to \$25.00	\$25.00 to \$35.00	\$35.00 to \$50.00	\$50.00 to \$150.00

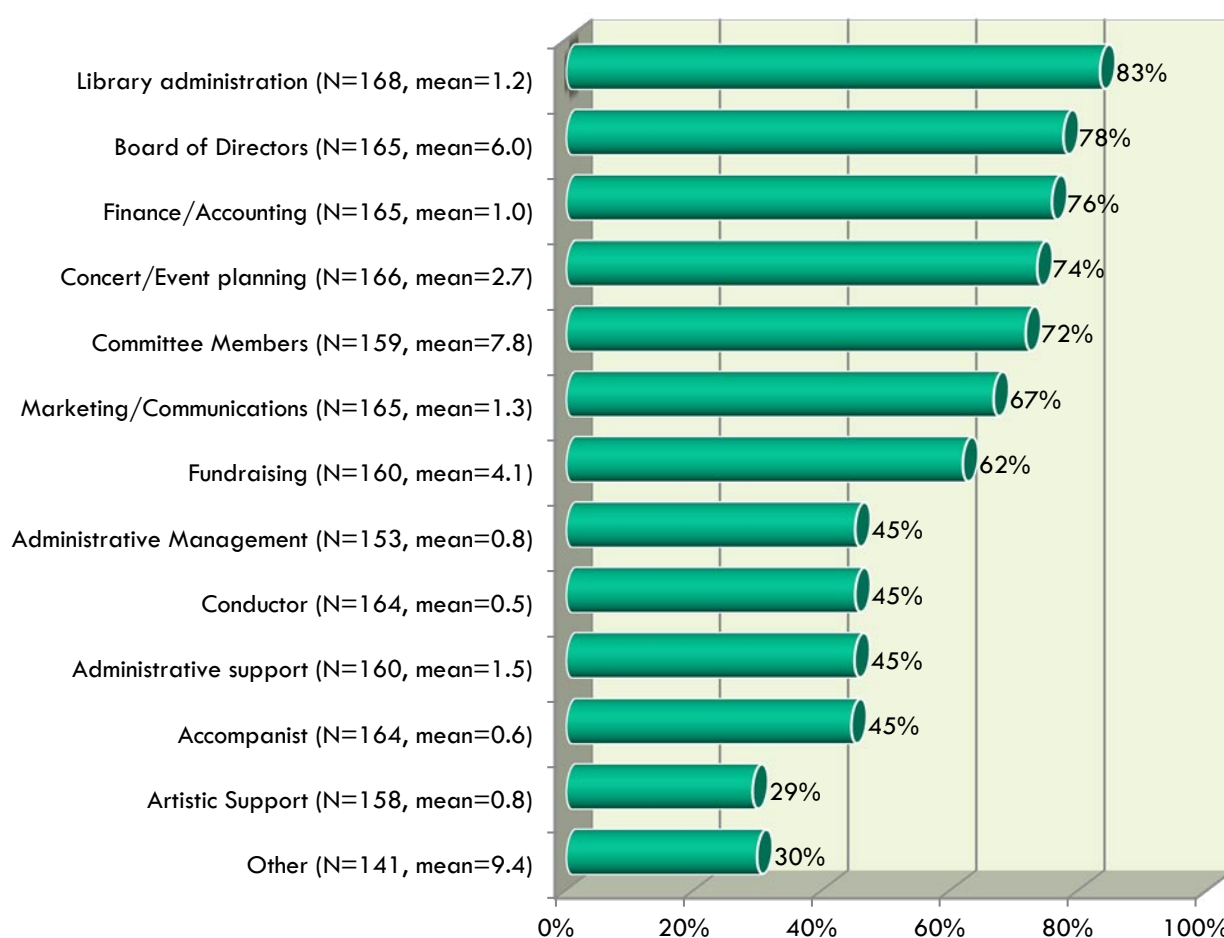
Notes: Part time and contract wages/fees have been converted to annualized equivalents based on 40 hours per week for 50 weeks per years for comparison purposes. Annual amounts were converted to hourly rates based on 2000 available work hours per year

Role of Volunteers

Like most nonprofits (which the vast majority of choirs are), volunteers play a critical role in the operation of choirs in Ontario. In fact, when given a list of roles that volunteers could potentially fill, all respondents indicated that they had at least one volunteer. **Exhibit 4-6** illustrates the usage of volunteers in choirs in Ontario. The survey results indicate that a significant majority of choirs use volunteers for library administration (83%), Board of Directors (78%), finance and accounting (76%), concert and event planning (74%), on committees (72%) and to a lesser extent for marketing and communications (67%) and fundraising (62%). Volunteers are less likely to be used in management and artistic positions.

The exhibit also shows the average (mean) number of volunteers used in each position. Most positions are in the range of one to two. The most notable exceptions are the typical volunteer positions, namely the Board of Directors (6 volunteers) and committees (7.8). Interestingly, with the exception of management and artistic positions, professional choirs tend to use more volunteers than amateur choirs. The same holds true for respondents with multiple choirs compared to those with just one.

Exhibit 4-6: Role of Volunteers



Note: Percents represent the portion of choirs who have these types of volunteers. Means represent the average (mean) number of volunteers per position.

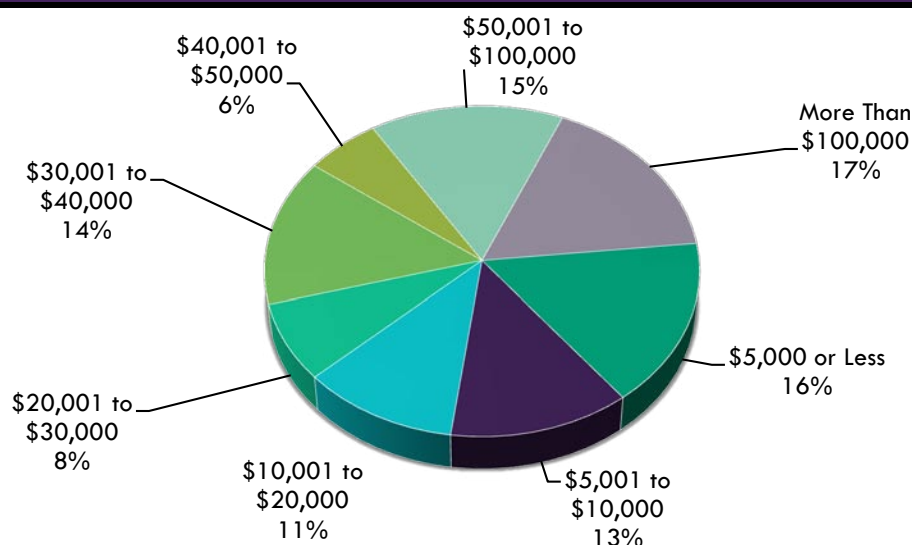
V. FUNDING AND FINANCES

This chapter looks at the financial operations of choral organizations. Areas covered include revenues, types of funding, expenses and surpluses (deficits).

Funding and Revenue Sources

On average, choral organizations generate \$82,000 in revenue per year (see **Exhibit 5-1**). This average however is skewed by a small number of very large choral organizations. According, the median (which represents the midpoint where 50% of organizations are below and 50% are above) is perhaps a better indicator of the typical revenue generation. The median revenue is \$32,000.

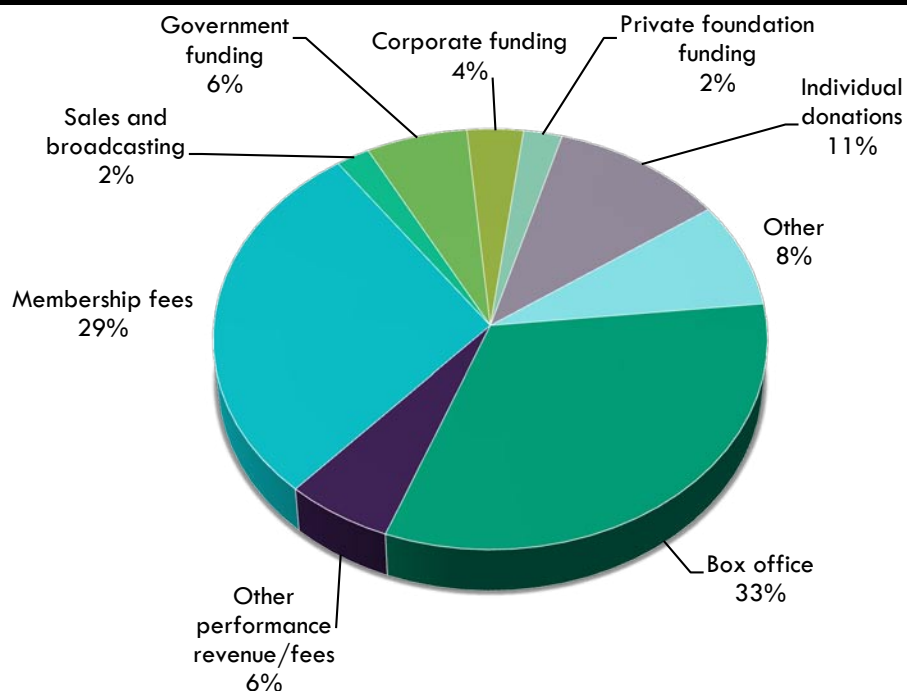
Exhibit 5-1: Choir Revenue



Notes: Responses may not sum to 100% due to rounding.
N=118, mean= \$82,000, median = \$32,000

Choirs in Ontario rely on two primary sources of revenue: Box office sales at 33% of revenues (on average) and membership fees (29%). Combined, these two items account for almost two thirds of choir revenues. The rest primarily consists of individual donations (11%), external funding (12% combined) and other performance revenue/fees (6%). A breakdown of choir revenue is presented in **Exhibit 5-2**.

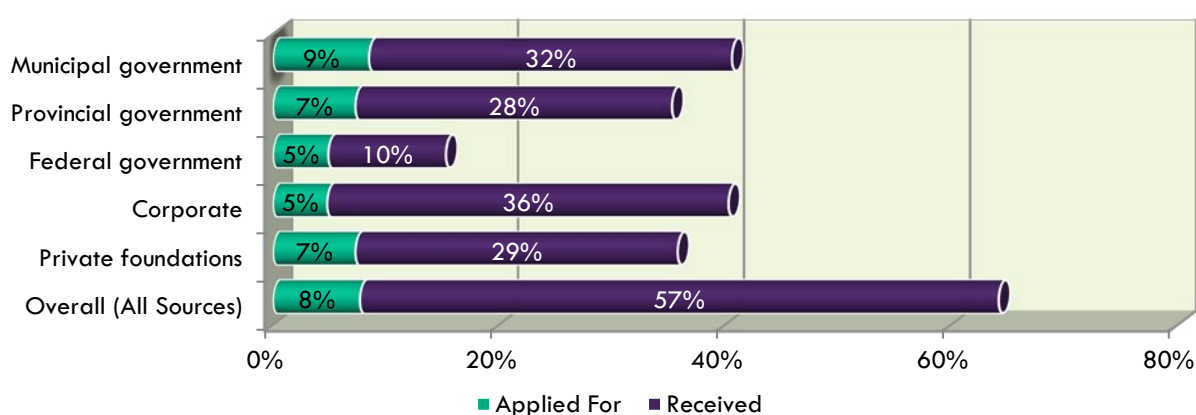
Exhibit 5-2: Breakdown of Revenue



Notes: Responses may not sum to 100% due to rounding.
N=138

As presented in the revenue breakdown, choirs receive an average of 12% of their funding from external sources (government, corporate and private foundations). **Exhibit 5-3** presents details on application for and receipt of external funding from different sources. Over half (57%) of choirs indicated that they have received funding from at least one of the external sources while a further 8% indicated that they have applied to at least one of the sources. Clearly, external funding is a key component to the community's finance structure. Interestingly, there is little variance in the use of the different external sources with one exception. Only 10% have received federal government funding while a further 5% have applied (but not received). This is considerably lower than the 28% to 36% who have received funding from the other sources. While not shown in the exhibit, it is interesting to note that professional (including semi professional) choirs are significantly more likely than amateur choirs to have received external funding (83% vs. 52%, respectively).

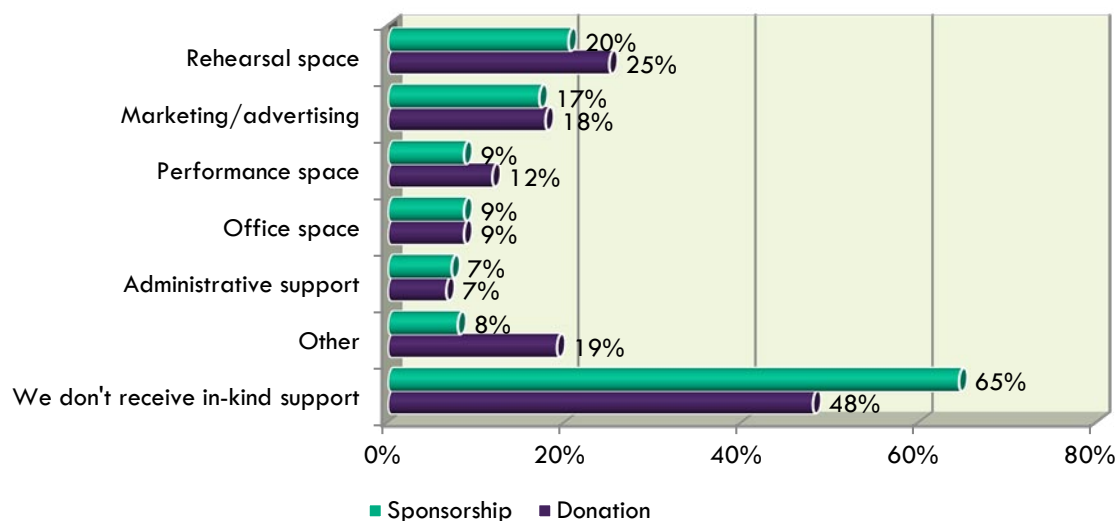
Exhibit 5-3: External Funding



Note: N=165

“In-kind” sponsorship or donations refer to situations where payment (or part payment) of the sponsorship fee or donation is provided in goods or services rather than cash. As illustrated in **Exhibit 5-4**, roughly one-third (35%) of choirs report receiving in-kind sponsorship while just over half (52%) received in-kind donations. While the results show a significant portion of the community does not rely on in-kind donations or sponsorships, they are certainly an important part of the financial make up of the sector. Rehearsal space and marketing/advertising support are the two forms of in-kind support most often provided.

Exhibit 5-4: In-Kind Funding

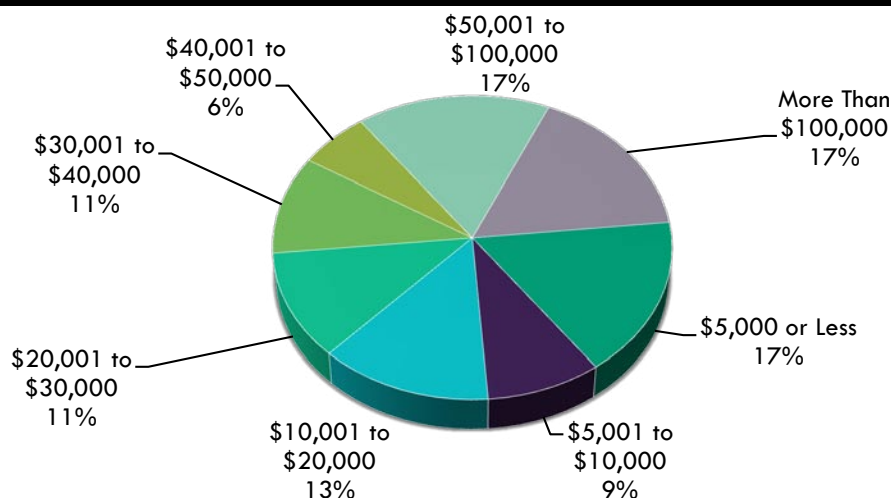


Notes: Percents sum to more than 100% due to multiple responses.
N=152

Expenses

On average, choral organizations spend \$82,000 in revenue per year (see **Exhibit 5-5**). Again, this average however is skewed by a small number of very large choral organizations. According, the median (which represents the midpoint where 50% of organizations are below and 50% are above) is perhaps a better indicator of the typical expenses. The median revenue is \$31,000. Given that most organizations are non-profit, it is not surprising that the average and median expenses are almost identical to the average and median revenues.

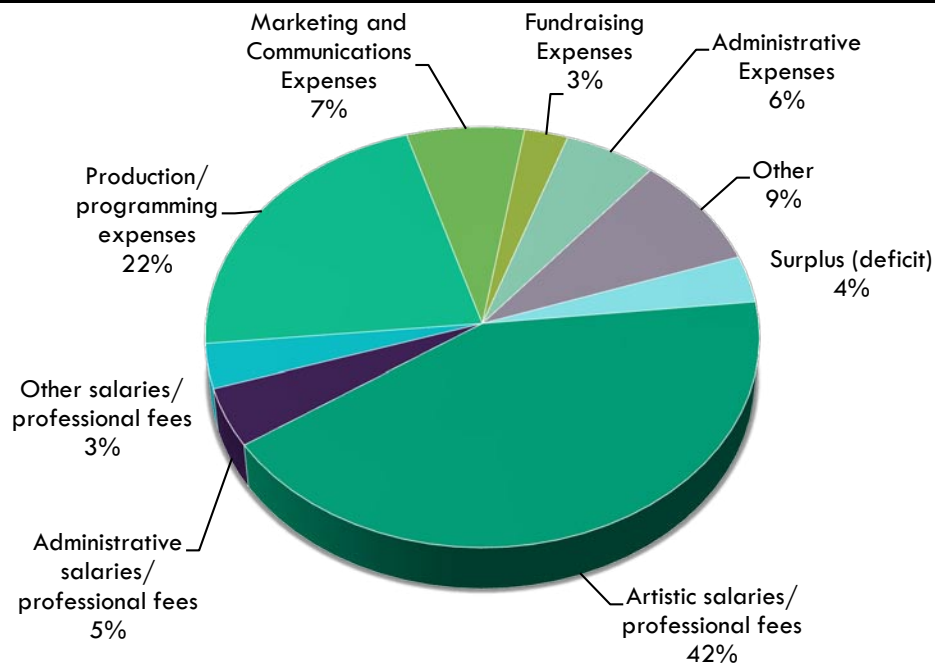
Exhibit 5-5: Choir Expenses



Notes: Responses may not sum to 100% due to rounding.
N=114, mean= \$82,000, median = \$31,000

Not surprisingly, staffing salaries and professional fees are the most significant expense for choirs accounting on average for 50% (artistic, administration and other). Production and programming expenses are also significant at 22% of expenses. The remaining expenses are considerably smaller by comparison. A breakdown of expenses is shown in **Exhibit 5-6**.

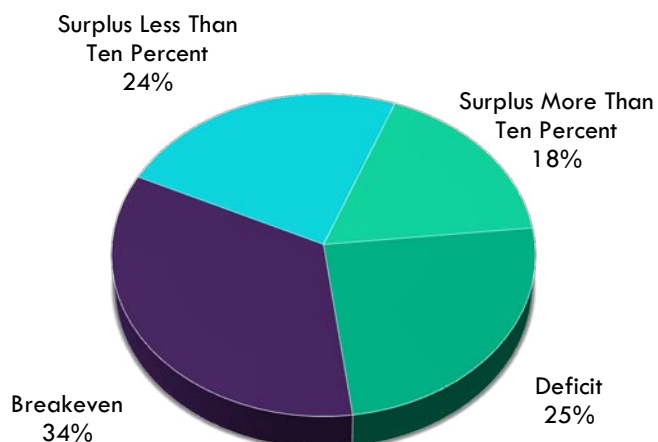
Exhibit 5-6: Breakdown of Expenses as a Percent of Revenue



Notes: Responses may not sum to 100% due to rounding.
N=114

On average, choirs achieved a 4% surplus in the most recent fiscal year. However, as seen in **Exhibit 5-7**, not all choirs achieved a surplus. In fact, one-quarter (25%) saw a deficit while a further third (34%) broke even. Only 18% had a surplus of more than 10%. These results are not surprising given that 97% of choirs in Ontario operate as non-profits.

Exhibit 5-7: Surpluses and Deficits



Notes: Responses may not sum to 100% due to rounding.
N=114

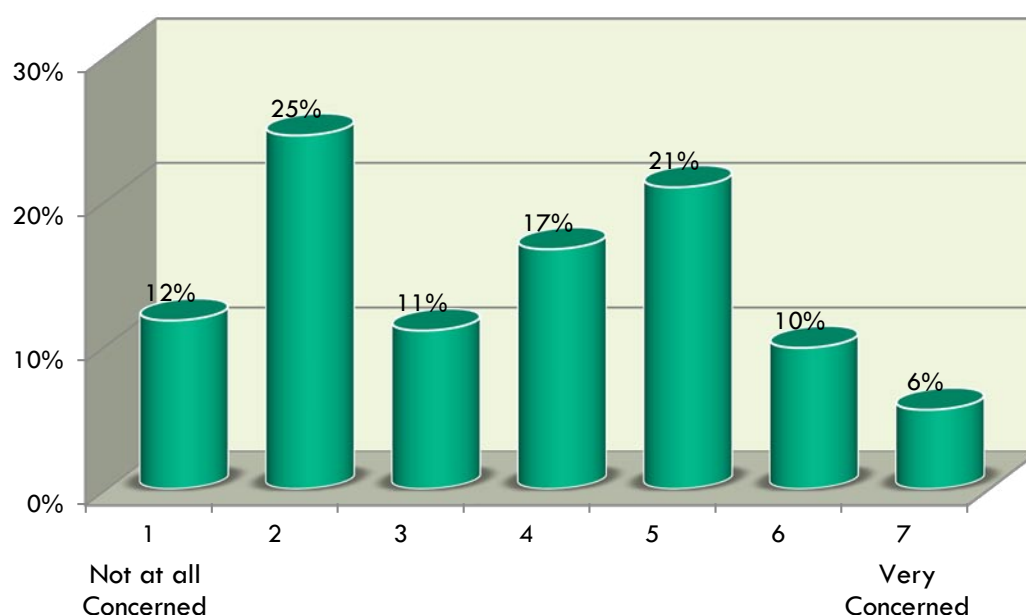
VI. TRENDS AND CHALLENGES

The following section provides a summary of how respondents feel about the future of the choral community in Ontario including their level of concern over future sustainability and the importance of trends and issues the community is facing.

Concern Over Future Sustainability

As shown in **Exhibit 6-1**, the overall level of concern about the future sustainability of choirs in Ontario is fairly moderate with an average rating of only 3.6 out of 7. Moreover, two-thirds (65%) of respondents awarded low concern ratings of 4 or less while only 6% rated their level of concern at a 7 out of 7.

Exhibit 6-1: Level of Concern Over Choir's Future Sustainability

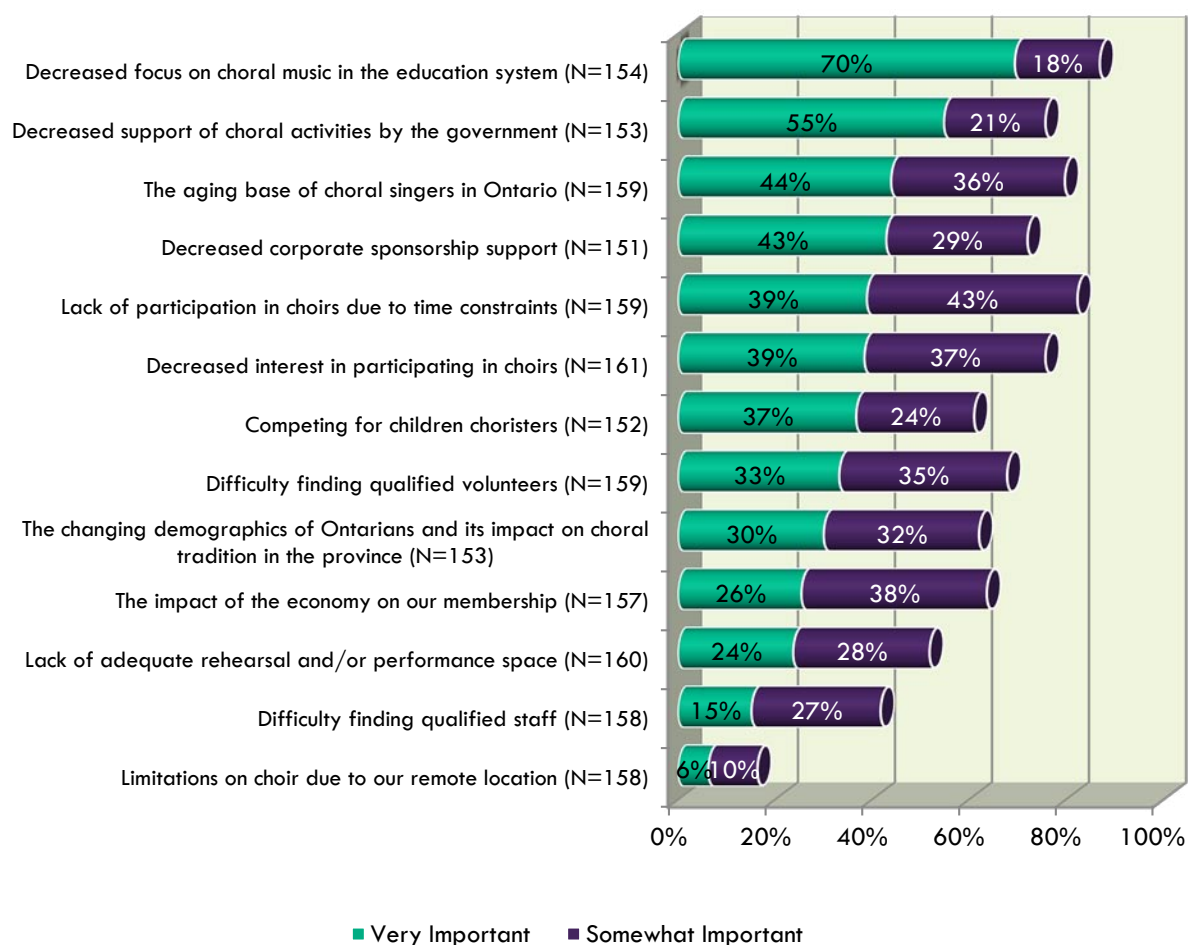


Notes: N=163, mean=3.6.

Issues Facing the Choral Community in Ontario

Respondents were asked to rate the importance of thirteen (13) issues facing the choral community in Ontario. The list of issues was developed based on the in-depth interviews. As illustrated in **Exhibit 6-2**, all but two of these issues were rated as somewhat or very important by more than half the respondents. In other words, eleven of the thirteen issues are seen as quite important in the eyes of the Ontario choral community. While the issues are generally considered important, there is a considerable variance in the degree of importance.

Exhibit 6-2: Importance of Issues Facing the Choral Community



Note: Scale is Not at all Important, Not Very Important, Somewhat Important and Very Important

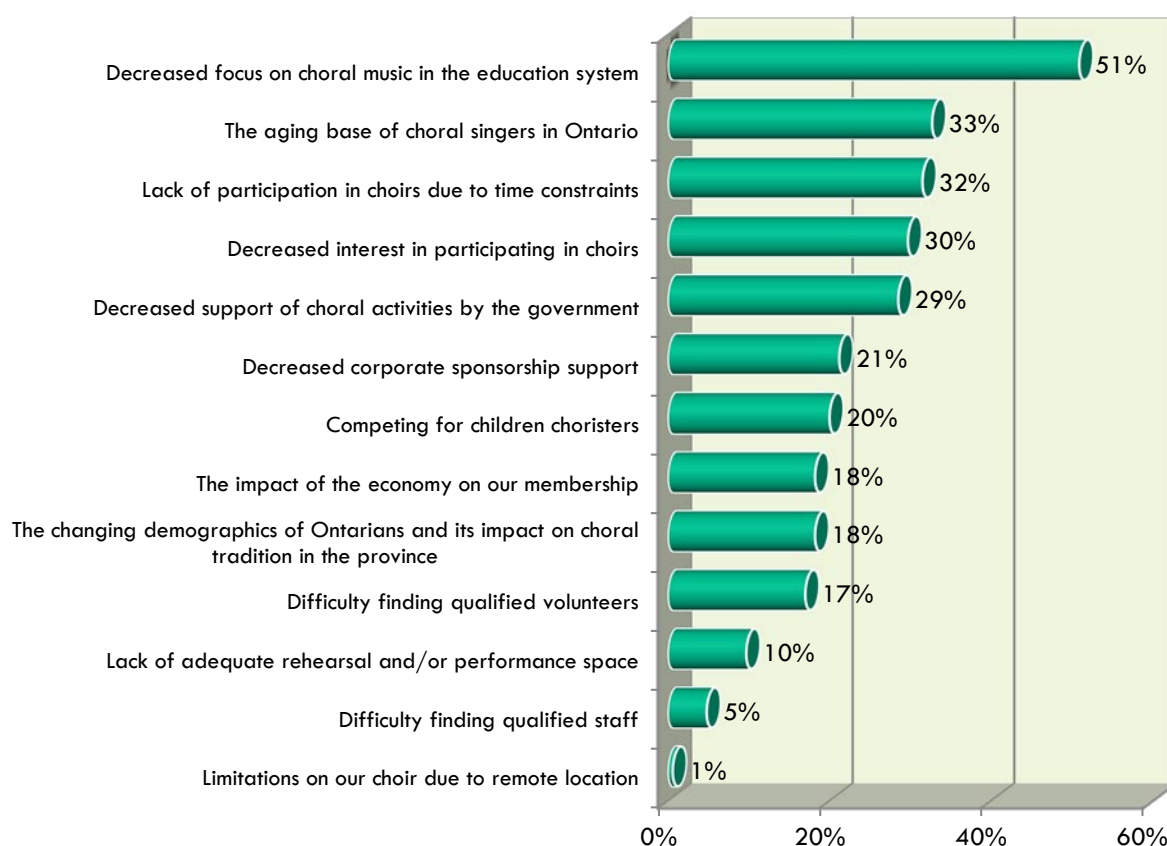
The issues can be divided into four tiers of importance, outlined below. Importantly, most of the trends in the top two tiers relate to a sense that choral music is losing its impact in local communities across Ontario and in other parts of the country:

- ☐ *Critical Issues:* These are issues that are of paramount importance to the community. Issues in this category are ones the choral community should be coming together to address. The two issues in this category are the decreased focus on choral music in the education system (70% rated as very important) and decreased support of choral activities by the government (55%). This is, in large part, due to a sense that the government, education system and society as a whole are putting a decreased importance on musical development relative to other skills and activities. Because some feel that musical development is no longer thriving at “the grassroots” level, the number of high quality and professional singers coming up through the system is diminishing.
- ☐ *Secondary Issues:* These issues are also very important. They impact future sustainability, but choirs may have some control over how they are impacted. Concern over recruiting choristers appears to be the main theme in this category. The challenges in this category include an aging base of choristers (44%), the lack of participation in choirs due to time constraints (39%), decreased interest in participating in choirs (39%) and competing for children choristers (37%). The fifth issue, decreased corporate sponsorship support (43%), relates to funding.
- ☐ *Minor Issues:* While they are important, these are not the issues that keep choir leaders awake at night. The issues in this category are mostly ones that are short term or that a choir can take steps to mitigate. Issues in this category include difficulty finding qualified volunteers (33%), the changing demographics of Ontarians and its impact on choral tradition in the province (30%), the impact of the economy on our membership (26%) and the lack of adequate rehearsal and/or performance space (24%).
- ☐ *Niche Issues:* These are issues that are only important to a small number of choirs. For others, they are simply not issues. Niche issues include difficulty finding qualified staff (15%) and limitations on our choir due to remote location (6%).



In addition to rating the different issues, respondents were asked to identify the three most important ones. Their responses are summarized in **Exhibit 6-3**. Not surprisingly, the decreased focus on choral music in the education system again tops the list. This is a clearly a hot button issue in the choral community in Ontario. As in the previous section, it is once again interesting to note is that the top four issues all have to do with the choirs' ability attract choristers. The results indicate that the Ontario choral community may want to consider actively working together as a group to grow the chorister base. More specifically, input from the in-depth interview portion of this study suggested that an increased focus on educating the public and the government "about the importance of music and singing" might be an initiative for the choral community to focus on moving forward.

Exhibit 6-3: Most Important Issues Facing the Choral Community (top three choices)

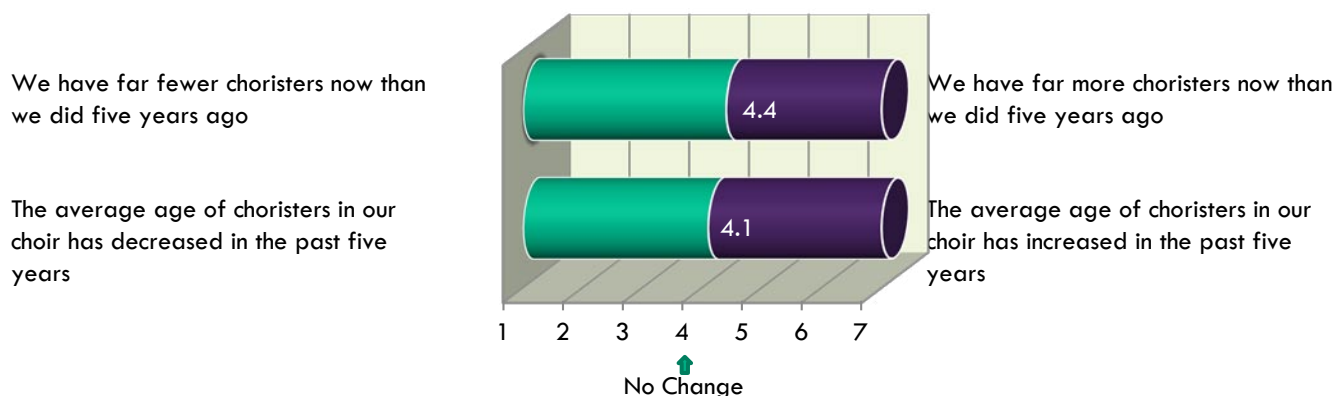


Notes: Percents sum to more than 100% due to multiple responses.
N=165

Changes in Chorister Composition

Choirs, on average, are seeing little change in the number and age of choristers in their choir (see **Exhibit 6-4**). While a look at the portions of respondents awarding each rating on the 1 to 7 scale shows that some are experiencing shifts one way or the other within their own choir, the net result for the community as a whole is little or no change. With that in mind, it is important to note that a significant portion of respondents awarded ratings between 3 and 5 out of seven indicating that they are seeing little or no change.

Exhibit 6-4: Changes in Chorister Composition in Past Five Years

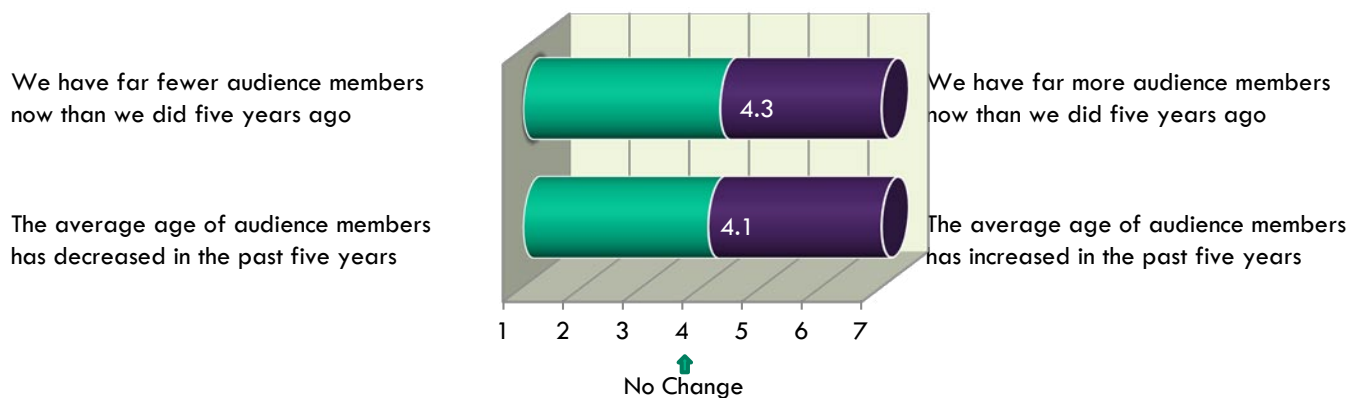


Note: N=182

Changes in Audience Composition

Similar to the trends with choristers, there appears to be little change in the last five years in the number and age of audience members (see **Exhibit 6-5**). Again, most ratings are in the 3 to 5 out of 7 range.

Exhibit 6-5: Changes in Audience Composition in Past Five Years



Note: N=177

VII. CONCLUSIONS

A number of conclusions and implications can be drawn from the study findings. The following is a summary of key conclusions and implications for the choral community in Ontario:

- **The number of community and professional choirs in Ontario appears to have been growing steadily over the past 40 years according to the year of establishment.** This study does not lend itself to determining whether or not the number of school and religious choirs is growing. Importantly, 15% of the Ontario population are active choristers. However, chorister and audience levels have neither increased nor decreased over the past five years according to survey respondents. **All of these signs point to a choral community that, on the whole, is fairly healthy. That said, it does not appear to be showing many signs of growth.**
- **The financial health of most Ontario choirs is stable, although some are struggling.** Nearly three-quarters of the study participants broke even or saw a budget surplus in the most recent fiscal year. **Despite this, a further 25% of study participants saw a deficit.**
- **Ontario choirs are self-sufficient in terms of revenue generation.** While Ontario choirs depend, on average, on external sources for 12% of revenues, the bulk of choral revenues come from box office sales and memberships.
- **Volunteers are the lifeblood of the choral community.** While the vast majority of Ontario choirs have at least one paid staff member, most 'staffed' positions are held by volunteers.

While the current health of the choral community is stable, it does not appear to be seeing much in the way of growth in the short-term. The key challenge ahead lies in bringing the choral community together to belie the sense that there is a decreasing interest and focus on choral music in Ontario, Canada and beyond.

Study participants feel that a decreased focus on music in the education system and in governmental support for choral activities is at the root of this issue. The fear is that lack of support at these levels will decrease the interest and participation in choral music at the grassroots level with severe implications for the future. Taking the passion and commitment exuded by many members of the choral community and using this to work together to educate and advocate on behalf of choral music in Ontario may well be a key success factor in addressing the challenges ahead.