

Summary of data collected: Ontario Community Festivals & Events COVID-19 Impacts Survey #1, April 2020

Introduction

The data summarized and shared in this report was collected through an independent Ontario-wide Community Festivals & Events COVID-19 Impacts Survey (“the survey”), issued to community festival and event organizers March 30-April 5, 2020.

For the purpose of the survey, ‘community festivals and events’ were left intentionally undefined in scope, size and scale, and were suggested to include, but not limited to activities including: concerts, walks and runs, festivals, and parades.

Community festivals and events are understood to be ‘local’ in nature, often attracting the majority of their attendees from within 40 kilometers of the festival or event location. Community festivals and events are often considered pillars of local heritage and culture, and instrumental to preserving and celebrating the vibrancy, connectivity, and resilience of Ontario’s communities.

Before completing the survey, respondents were asked to self-identify as being an organizer of an outdoor community festival or event anywhere in Ontario, Canada.

396 qualified responses to the survey, representing 396 individual festivals and events across 133 Ontario communities (unique cities/towns), were received.

Thank you to each and every survey respondent. The priority you placed on sharing your information, and the time you took to submit your responses, are both greatly appreciated and vital to the learnings and development of our industry.

Thank you as well to the following festival and event networks, stakeholders and industry allies for their assistance in distributing the survey: Canadian Association of Fairs and Exhibitions (CAFÉ), Festivals and Events Ontario (FEO), Network of Municipal Event Planners of Ontario (NMEP), Ontario BIA Association (OBIAA), Toronto BIA Association (TABIA), Algonquin College Event Management Graduate Certificate program, Centennial College Event Management Graduate Certificate program, Conestoga College Event Management Graduate Certificate program, George Brown College Special Event Management Program, Humber College Event Management Graduate Certificate program, and Niagara College Event Management Graduate Certificate program.

Aim

The aim of this survey was to gather information and aggregate data to understand the current impacts of the COVID-19 pandemic on community festivals and events, and the current state of decisions, adjustments and responses being undertaken in real-time by community festival and event organizers.

Purpose

The data collected through this survey provides the foundation for an evidence-based approach to related discussions and advocacy moving forwards.

Interpretations assembled from a review of the data may be used to inform opportunities for individual festivals and events, stakeholders and industry associations to mitigate pandemic impacts, advocate for support, and champion investment in festivals and events as gateways to community resilience and post-COVID recovery.

Data & Interpretations

Survey questions and answer choices were written with the intention of capturing as much real-time measurable data as possible. As such, limited opportunity for respondents to provide open-ended answers was provided.

Given the evolving state of the COVID-19 pandemic, the author acknowledges that every event, committee and organization may be experiencing fluctuating impacts and continuous changes in decisions. As such, the information used to inform interpretations in this report is assumed to be accurate at the time of survey submission, however is understood to be subject to change at any time.

The data collected and statistics provided are unaudited.

All interpretations, assumptions and opinions in this report are those of the author only, and do not represent any event, organization, employer, association, stakeholder or other party.

Timeline of COVID-19 Impacts

The following is an annotated timeline of the international identification of COVID-19, and the subsequent milestones marking impacts of the pandemic on the nature of mass gatherings, festivals and events in Ontario, Canada. This timeline is provided for context to aid in the reader's review and interpretation of the survey data summarized in this report.

December 31, 2019	First virus case (later designated COVID-19) reported to the World Health Organization (WHO) Country Office in China ¹ .
January 30, 2020	WHO declared COVID-19 outbreak a Public Health Emergency of International Concern ¹ .
March 11, 2020	WHO Director-General declared COVID-19 outbreak a pandemic ² .
March 13, 2020	Ontario Chief Medical Officer of Health suspended gatherings over 250 people ³ .
March 15, 2020	U.S. Centers for Disease Control and Prevention recommended that Americans avoid events with more than 50 people, and organizers cancel or postpone

events such as “conferences, festivals, parades, concerts, sporting events, weddings, and other types of assemblies” for eight weeks⁴.

March 16, 2020	Ontario Chief Medical Officer of Health advised Ontarians to avoid gatherings of over 50 people ⁵ .
March 17, 2020	Province of Ontario declared a state of emergency ⁶ . Among other facilities, theatres, including those offering live performances of music, dance, and other art forms, as well as cinemas that show movies, and concert venues were required to close ⁶ .
March 24, 2020	Tokyo 2020 Olympics officially postponed to 2021 ⁷ .
March 28, 2020	Province of Ontario issued an emergency order under the Emergency Management and Civil Protection Act to prohibit organized public events and social gatherings of more than five people ⁸ .
March 30, 2020	Community Festivals & Events COVID-19 Impacts Survey #1 issued to industry stakeholders across Ontario.
March 31, 2020	City of Toronto cancelled all City-led major mass participation events and all City permits for major mass participation events through June 30 ⁹ .
March 31, 2020	Province of Ontario extended school closures until May 1, 2020 ¹⁰ .
April 5, 2020	Community Festivals & Events COVID-19 Impacts Survey #1 closed.

Broad Findings

The findings of this survey suggest that the COVID-19 pandemic has already had dramatic negative effects on the logistical undertakings, community benefits, and economic impacts of Ontario’s outdoor community festival and event industry.

52% of respondents (206 festivals and events) indicate having already made the decision (voluntarily or otherwise) to postpone or cancel their 2020 festival or event. Of the 396 festivals and events in the survey:

- 107 have cancelled for 2020
- 99 have postponed, and
- 53 have modified to be a virtual or digital event.

These postponements and cancellations represent planned changes to 1,671 event days already this year.

These changes represent disruptions to more than 5,600 cumulative years of community festival and event history across the province.

With 90% of respondents indicating their festivals and events were originally scheduled to occur between April 1 and September 30, 2020, the ongoing pandemic conditions suggests that the possibility of recovering the altered dates, should public health conditions allow in 2020, appears limited. This understanding is apparent even before considering additional factors including financial implications, programming availability, and community engagement, indicated by respondents to also contribute to deciding the status of their festivals and events.

In 2019, estimated attendance at the festivals and events in the survey accounted for more than 9.7 million attendees across 133 Ontario communities.

When compared with the population of the province of Ontario¹¹, the documented 2019 total attendance number may suggest that up to 73% of Ontarians attended a local festival or event last year.

When accounting for the festivals and events that have already had to cancel (107), the absence of these festivals and events represents an estimated 27% reduction in projected community festival and event attendance; that's a decrease of more than 2.6 million attendees this year.

Survey respondents were asked to summarize the community benefit of their festival or event by choosing from pre-selected responses offered in the survey. *Community connectivity*, *Fundraising/charity benefit* and *Economic impact* were identified by respondents as the top three most-selected community benefits, representing 54% of total responses cumulatively.

These factors have also emerged as themes under which the impacts of the COVID-19 pandemic are already being felt by individual festivals and events, and are influencing the province's festival and event industry as a whole.

- Regardless of event cancellation or postponement status, a combined total of 40% of respondents indicate *community support/engagement* as being the most important critical success factor to the future of their festival or event;
- Despite the importance of keeping the community engaged, an average of 22% of respondents indicated between 81-100% reductions in event volunteers, vendors and exhibitors, and community partners to date;
- An average of 17% of respondents indicated between 81-100% reductions in their 2020 prospects for grant revenue, sponsorship revenue and cash revenue;
- 32% of respondents that self-identified to be economic impact earners under Ontario's Tourism Regional Economic Impact Model (TREIM) in 2019, have indicated between 81-100% reductions in their prospective 2020 economic impact; and,
- The negative economic implications of the pandemic on festivals and events are further reinforced by an average of 26% of respondents indicating between 81-100% reductions in the number of full-time staff, part-time staff, and contractor and supplier companies they will employ in 2020.

The findings of the survey illustrate current and measurable impacts had by the COVID-19 pandemic on individual community festivals and events, and the festival and event industry already.

Additional responses gathered under the “Too early to tell” option provided for many survey questions, indicate that the magnitude and severity of COVID-19 pandemic impacts are still largely unknown for many respondents.

As the COVID-19 pandemic continues to evolve, and restrictions in the size of gatherings continue, the impacts identified by the survey may increase in magnitude and severity. Additionally, new and diversified impacts and outcomes could occur.

In these early days, festival and event organizers, committees and stakeholders may be able to gain capacity, mitigate negative impacts, and enhance the success of their festival and event recovery, by expanding community awareness of and engagement in the pandemic-related impacts to their festival or event. Enhancing community engagement in the short-term may also assist in championing for advocacy of and support to community festivals and events once the longer-term impacts of the pandemic become known.

Survey Results

General Festival and Event Information

Factor	Result
Responses	
Total responses	426
Duplicate or incomplete responses, disqualified	30
Total qualified individual responses	396
Organizations	
Categories of known organizations:	
Associations, Societies, Foundations	33
BIAs, Chambers of Commerce	45
Groups, Clubs	34
Municipalities	27
Non-governmental organizations	6
Service Clubs	21
Uncategorized	105
Total individual organizations	271
Festival and Event Locations	
Total unique locations (City/Town), Ontario	133

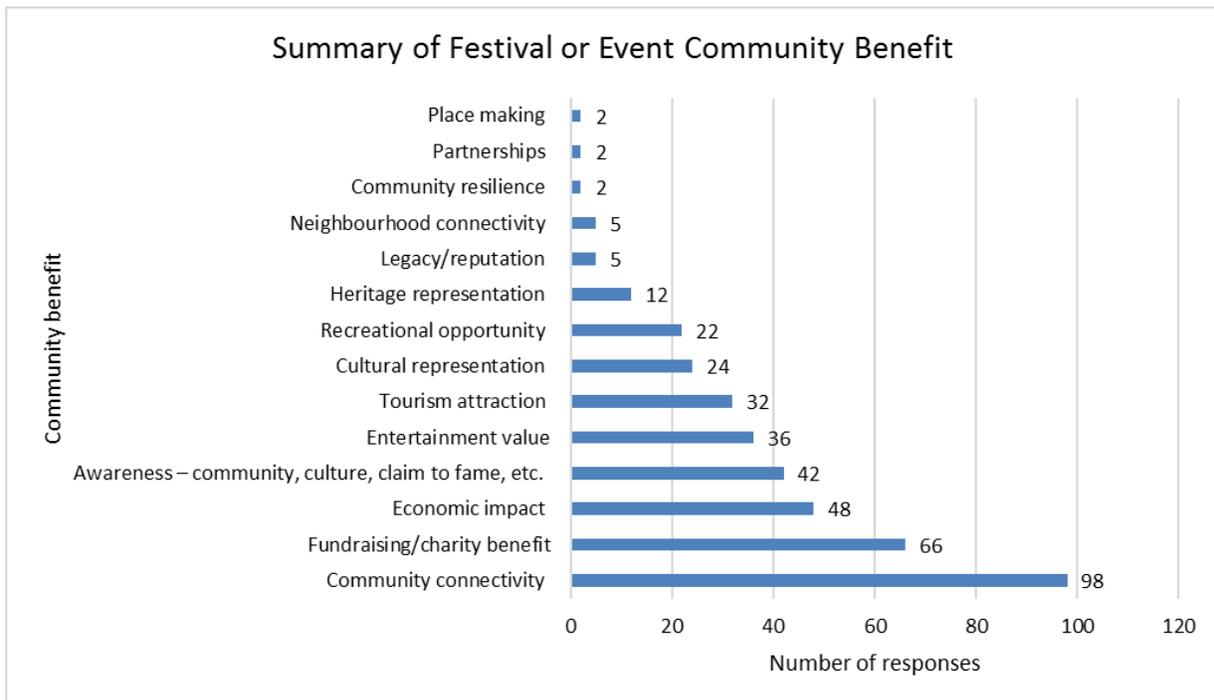


Factor	Result
Festival and Event Date (2020, planned)	
Winter (Jan. 1-March 31)	19
Spring (April 1-June 30)	178
Summer (July 1-Sept. 30)	177
Fall (Oct. 1-Dec.31)	22
Total # of event days (2020, anticipated)	3,214
Festival and Event Attendance (2019)	
382 respondents disclosed; cumulative	9,783,427
Festival and Event History	
Total # of years the festival or event has occurred (pre-2020); 378 respondents disclosed; cumulative	10,847

Community benefit

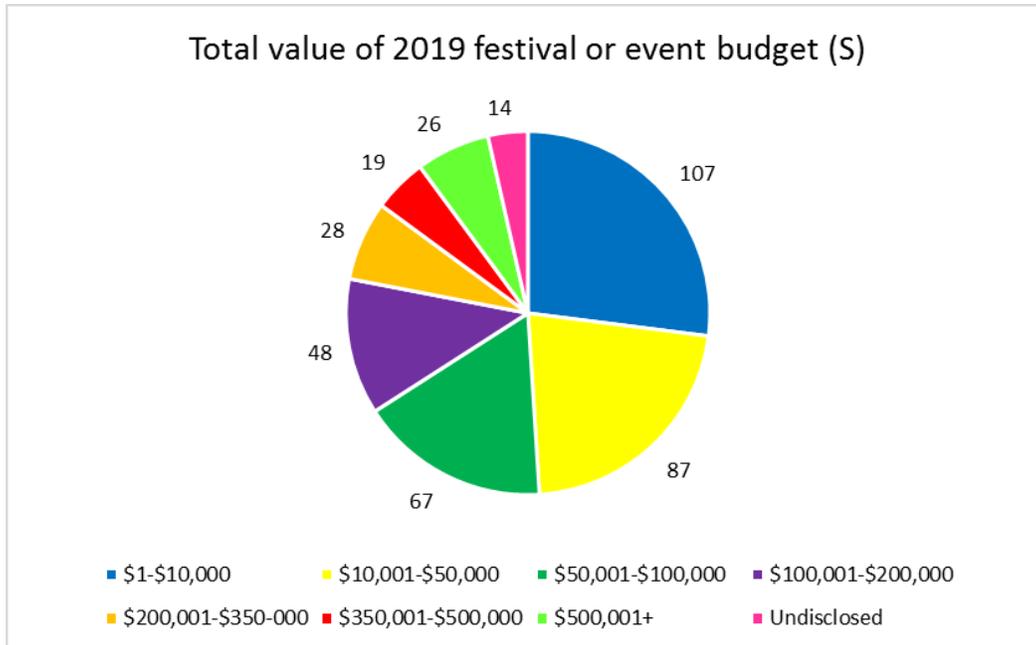
Survey respondents were asked the question: *How would you summarize the community benefit of your festival or event in one statement?*

Respondents selected the community benefit most aligned with the outcomes of their festival or event from 14 pre-selected responses offered in the survey. *Community connectivity*, *Fundraising/charity benefit* and *Economic impact* were identified by respondents as the top three most-selected community benefits, representing 54% of total responses cumulatively.



Total value of 2019 festival or event budget (\$)

The total value of the majority of festival or event budgets indicated by respondents is between \$1-10,000.



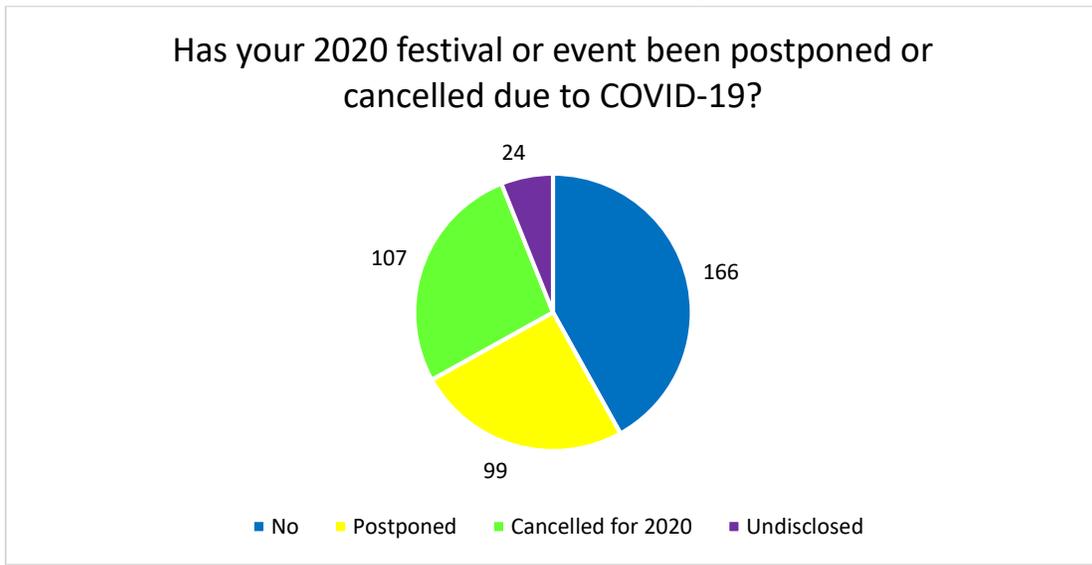
COVID-19 related Decisions and Adjustments

Postponements and cancellations

When analyzed individually, the responses to this question indicate that the majority of festivals and events have not postponed or cancelled their festival or event.

However, when the responses are categorized to indicate whether or not the event will be proceeding as originally scheduled for 2020, the majority of respondents indicated having made the decision not to proceed with their event as originally scheduled.

52% of respondents (206 festivals and events) indicate having already made the decision (voluntarily or otherwise) to postpone or cancel their 2020 festival or event.

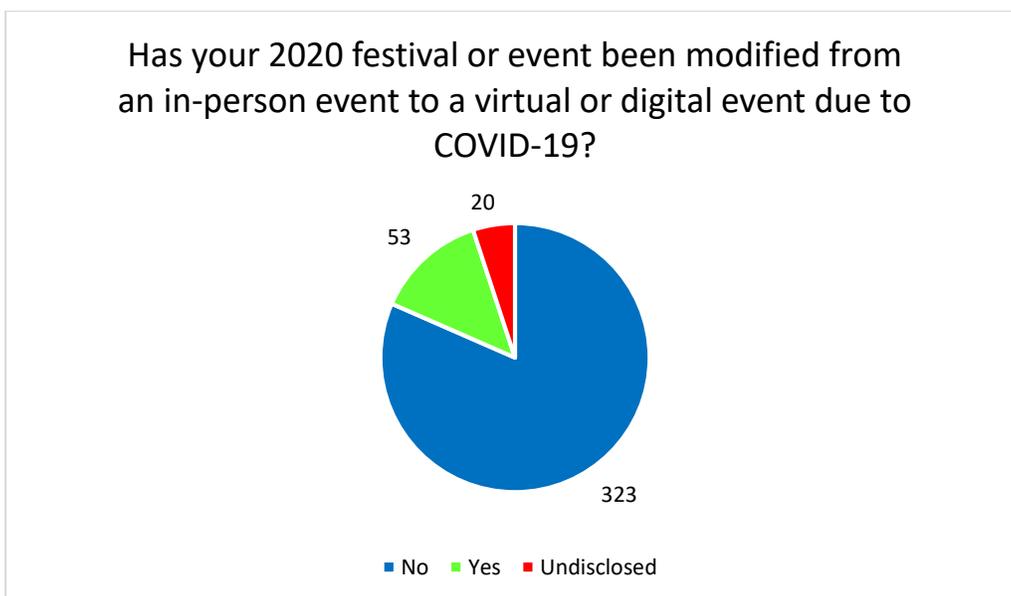


Virtual or digital modifications

The majority of festivals or events have not been modified from in-person events to virtual or digital events.

Of the respondents that indicated they have modified their festival or event, further information was not gathered to aid in understanding whether these festivals or events have been modified in lieu of postponing or cancelling, or have been modified and still postponed and/or rescheduled.

There may be a correlation between respondents' decisions to modify their festival or event as an alternative to cancelling or postponing their event, however these practices were not explored by the survey.



COVID-19 related Festival and Event Cancellations

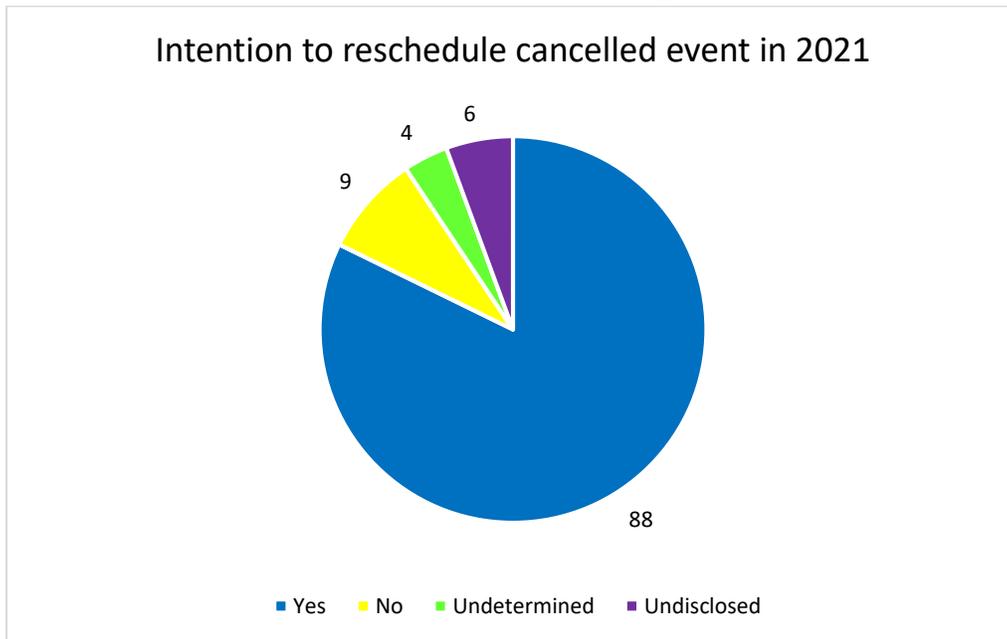
Factors that influenced cancellation

Of the 12 pre-selected factors presented in the survey for respondents to indicate their motivation for cancelling over postponing and rescheduling their festival or event, *Anticipated COVID-19 recovery timelines* was indicated as the most significant factor, followed by *Seasonality of the festival or event*.

ANSWER CHOICES	RESPONSES	
Actions of competitor festivals or events	18.02%	20
Anticipated COVID-19 recovery timelines	87.39%	97
Attendee/participant conflicts	26.13%	29
Availability of the festival or event date	24.32%	27
Committed expenses	8.11%	9
Community support/expectations	22.52%	25
Event reputation/legacy	20.72%	23
Grant commitments	2.70%	3
Scheduling conflicts	22.52%	25
Seasonality of the festival or event	32.43%	36
Sponsorship commitments	9.01%	10
Talent/entertainment commitments/availability	15.32%	17
Other	9.91%	11
Total Respondents: 111		

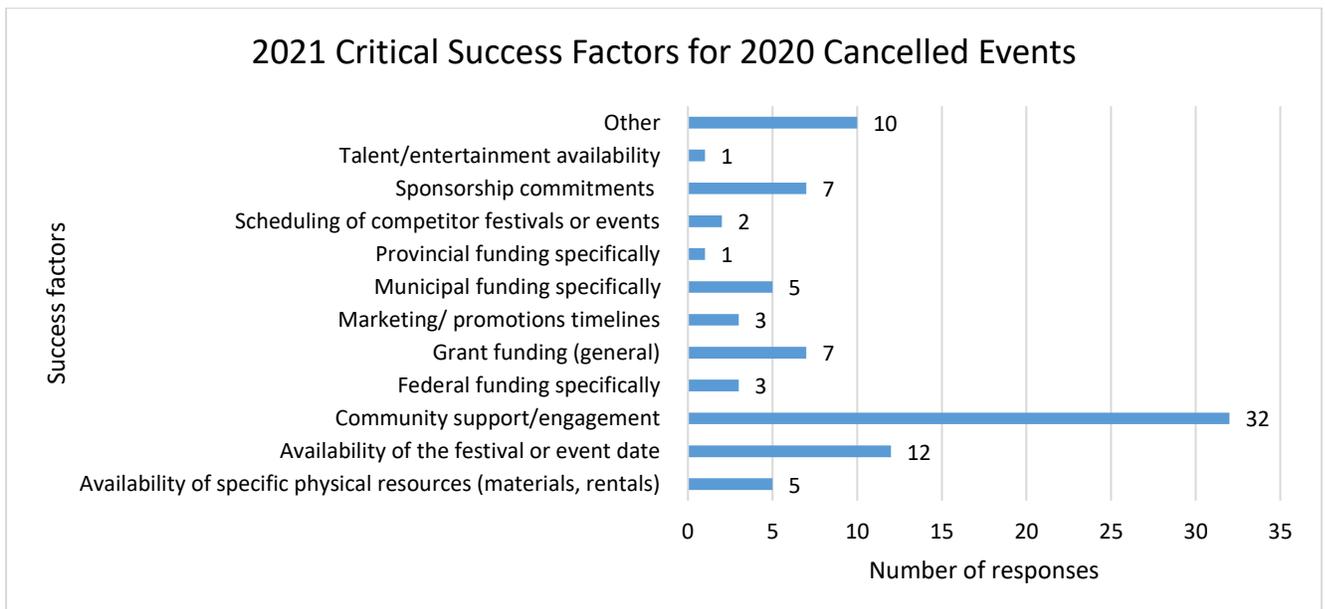
Intention to reschedule festival or event in 2021

Of the respondents that indicated their 2020 festival or event has been cancelled, the majority indicated plans to reschedule the festival or event in 2021.



Factors for success in 2021

Of the respondents that indicated their intention to reschedule their festival or event in 2021, the majority indicated *Community support/engagement* to be the most critical factor to the success of the rescheduled festival or event next year.



COVID-19 related Festival and Event Postponements

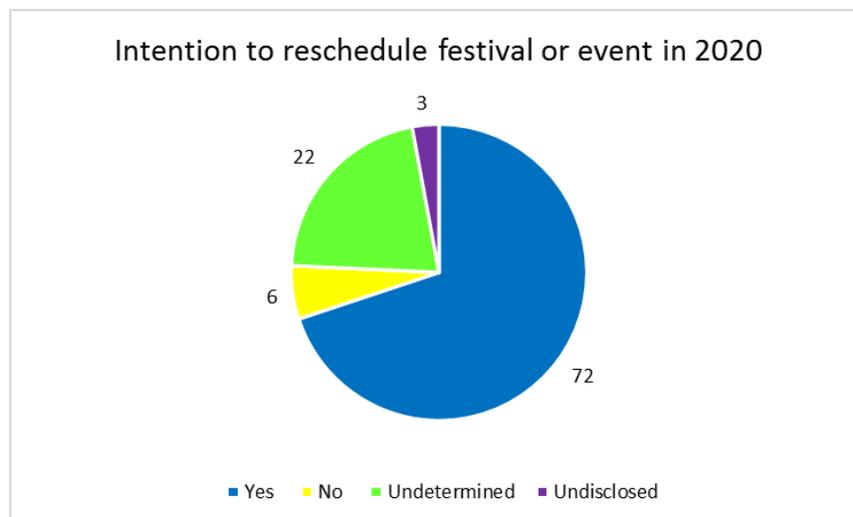
Factors that influenced postponement

Of the 12 pre-selected factors presented in the survey for respondents to indicate their motivation for postponing over cancelling their festival or event, *Anticipated COVID-19 recovery timelines* was indicated as the most significant factor, followed by *Community support/expectations*.

ANSWER CHOICES	RESPONSES	
Actions of competitor festivals or events	1.01%	1
Anticipated COVID-19 recovery timelines	47.47%	47
Availability of the festival or event date	7.07%	7
Committed expenses	4.04%	4
Community support/expectations	15.15%	15
Event legacy/reputation	9.09%	9
Grant commitments	3.03%	3
Seasonality of the festival or event	4.04%	4
Sponsorship commitments	3.03%	3
Talent/entertainment commitments/availability	1.01%	1
Other	5.05%	5
TOTAL		99

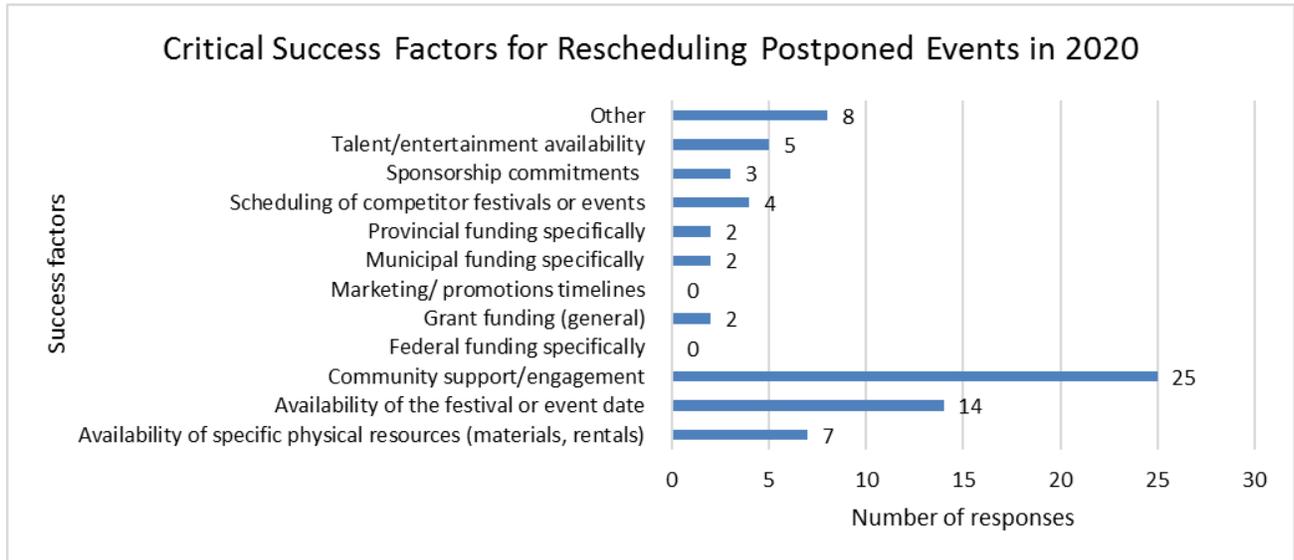
Intention to reschedule festival or event in 2020

Of the respondents that indicated their festival or event has been postponed, the majority indicated plans to reschedule the festival or event in 2020 if pandemic conditions allow.



Factors for success in 2020

Of the respondents that indicated their intention to reschedule their festival or event in 2020, the majority indicated *Community support/engagement* to be the most critical factor to the success of the rescheduled festival or event this year.



COVID-19 related Impacts, compared against 2019 baselines

Pre-pandemic Conditions (2019 Baseline)	# of responses	COVID-19 Impacts as of April 6, on 2020...
Total value of 2019 grants received (\$)		Grant prospects (responses) 1-40% reduction = 10 41-80% reduction = 5 81-100% reduction = 11* Too early to tell = 114 Increase = 1 *15% of disclosed grant recipients
\$1-\$1,000	29	
\$1,001-\$5,000	33	
\$5,001-10,000	45	
\$10,001-\$50,000	44	
\$50,001-\$100,000	1	
\$100,001+	31	
N/A – Not applicable	195	
Undisclosed	18	
Total value of 2019 total sponsorships received (cash and in-kind) (\$)		Sponsorship prospects (responses) 1-40% reduction = 24 41-80% reduction = 29 81-100% reduction = 41* Too early to tell = 159 Increase = 4 *13% of disclosed sponsorship recipients
\$1-\$1,000	36	
\$1,001-\$5,000	64	
\$5,001-10,000	50	
\$10,001-\$50,000	100	
\$50,001-\$100,000	33	
\$100,001+	38	
N/A – Not applicable	61	
Undisclosed	14	



Pre-pandemic Conditions (2019 Baseline)	# of responses	COVID-19 Impacts as of April 6, on 2020...
Total value of all other 2019 cash revenue (ticket sales, beer garden, etc.) (\$)		Cash revenue prospects (responses) 1-40% reduction = 13 41-80% reduction = 27 81-100% reduction = 64* Too early to tell = 134 Increase = 2 *22% of disclosed cash revenue earners
\$1-\$1,000	40	
\$1,001-\$5,000	45	
\$5,001-10,000	35	
\$10,001-\$50,000	81	
\$50,001-\$100,000	28	
\$100,001+	63	
N/A – Not applicable	89	
Undisclosed	15	
Total value of 2019 event economic impact (TREIM), if known (\$)		Economic impact (responses) 1-40% reduction = 8 41-80% reduction = 14 81-100% reduction = 63* Too early to tell = 168 Increase = 3 *32% of known economic impact earners
\$1-\$10,000	35	
\$10,001-\$50,000	31	
\$50,001-\$100,000	21	
\$100,001-\$200,000	13	
\$200,001-\$350,000	18	
\$350,001-\$500,000	11	
\$500,001+	66	
N/A – Not applicable	31	
Unknown	147	
Undisclosed	23	

Pre-pandemic Conditions (2019 Baseline)	# of responses	COVID-19 Impacts as of April 6, on 2020...
# of full-time festival or event staff		Changes in full-time staff (responses)
1-5	196	1-40% reduction = 21 41-80% reduction = 18 81-100% reduction = 22* Too early to tell = 71 Increase = 1 *24% of respondents
6-10	35	
11-20	8	
21-50	10	
50+	6	
N/A – Not applicable	121	
Undisclosed	20	
# of part-time festival or event staff		
1-5	125	1-40% reduction = 12 41-80% reduction = 13 81-100% reduction = 47* Too early to tell = 71 Increase = 2 *33% of respondents
6-10	43	
11-20	24	
21-50	17	
50+	17	
N/A – Not applicable	149	
Undisclosed	21	
# of festival or event volunteers		
1-5	38	1-40% reduction = 8 41-80% reduction = 14 81-100% reduction = 68* Too early to tell = 181 Increase = 1 *18% of respondents
6-10	35	
11-20	62	
21-50	88	
50-100	67	
101-200	34	
200+	45	
N/A – Not applicable	11	
Undisclosed	16	

Pre-pandemic Conditions (2019 Baseline)	# of responses	COVID-19 Impacts as of April 6, on 2020...
# of vendors/exhibitors		Changes in vendors/exhibitors (responses) 1-40% reduction = 12 41-80% reduction = 16 81-100% reduction = 62* Too early to tell = 171 Increase = 0 *28% of respondents
1-5	68	
6-10	46	
11-20	55	
21-50	70	
50+	78	
N/A – Not applicable	61	
Undisclosed	18	
# of community partners		Changes in community partners (responses) 1-40% reduction = 10 41-80% reduction = 21 81-100% reduction = 41* Too early to tell = 182 Increase = 2 *21% of respondents
1-5	148	
6-10	80	
11-20	60	
21-50	38	
50+	25	
N/A – Not applicable	28	
Undisclosed	17	
# of contractor and supplier companies		Changes in contractor and supplier companies (responses) 1-40% reduction = 12 41-80% reduction = 8 81-100% reduction = 54* Too early to tell = 168 Increase = 0 *22% of respondents
1-5	130	
6-10	112	
11-20	64	
21-50	26	
50+	9	
N/A – Not applicable	39	
Undisclosed	16	

Conclusion

Local community festivals and events are often pillars of local heritage and culture, and instrumental to preserving and celebrating the vibrancy, connectivity, and resilience of Ontario's communities.

While the total number of community festivals and events across the province is unknown, the 396 festival and events across 133 Ontario communities that have contributed to the findings of this survey, present a perspective on the industry's current state of affairs.

Using the data shared by survey respondents, this report presents a cross-section of the current state of decisions, adjustments and responses being undertaken in real-time by Ontario's festival and event organizers, in response to the impacts of the COVID-19 pandemic on their festivals and events.

It is anticipated that Ontario's individual festivals and events, and the industry as a whole, are still in the early days of identifying and analyzing the effects of the COVID-19 pandemic. Despite this timeline, the findings of the survey suggest that the COVID-19 pandemic has already had dramatic negative effects on the logistical undertakings, community benefits, and economic impacts of the outdoor community festival and event industry in Ontario.

Efforts by organizers and industry stakeholders to maintain and enhance community support for, and engagement with festivals and events as much as possible during these times, may prove critical to preserving and propelling their long-term recovery, and aid in the post-pandemic reconnection of Ontario's communities.

Next steps

This report will be shared broadly through channels to Ontario's festival and event organizers, stakeholders, industry associations, and with Minister Lisa MacLeod with the Province of Ontario's Ministry of Heritage, Sport, Tourism and Culture Industries.

In sharing this report, the intention is to establish a common foundation of knowledge, priorities and focused support among industry stakeholders and decision makers.

Ontario's Network of Municipal Event Planners intends to distribute at least two future industry surveys – late-summer 2020, and end of year 2020 – to track and report on the evolution of the impacts of the COVID-19 pandemic on Ontario's community festivals and events.

The analysis of future and comparative data gathered through these additional surveys will be used to inform recommendations for best practices, systems and supports that can assist the short-term and long-term recovery and sustainability of Ontario's community festivals and events.

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About NMEP:

Ontario's Network of Municipal Event Planners (NMEP) brings together festival and event professionals working in municipal government across the province to share best practices, combine resources where possible, and to support one another in the planning and permitting of festivals and events within their respective communities. NMEP members engage with each other, independent event organizers, industry contractors, suppliers, vendors, sponsors and other stakeholders in order to continuously develop and enhance event management processes. NMEP maintains four network chapters, representing municipal special event offices and community festivals and events across the province.