

Profile and Economic Significance of the Arts and Culture Sector in Manitoba



Kelly Hill, Hill Strategies Research
Winnipeg, March 15, 2010

Statistical Insights on the Arts, Arts Research Monitor and select presentations (including today!)

Funding from ...



□ Thanks to ACI Manitoba

Hill Strategies Research

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- A Canadian company that specializes in arts research.
- Free resources available via email and internet
- Sign up for free at HillStrategies.com

Arts Research Monitor

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- Free report (10 times per year)
- Summaries and links to research evidence
- Now finishing its 8th year of publication (over 300 articles)
- Free, categorized, searchable information at ArtsResearchMonitor.com

Arts Research Monitor

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- **Evidence base for the arts ...**
 - Arts advocacy
 - Arts attendance & participation
 - **Arts education**
 - **Arts funding & finances**
 - Copyright and the arts
 - Creative class, cities, people, neighbourhoods
 - Diversity & immigration
 - Facilities
 - Human resources
 - Internet, technology & the arts
 - Miscellaneous resources
 - Nonprofit sector information
 - Organizational planning, management, governance & marketing
 - Partnerships
 - **Provincial and local information**
 - **State of the artist: earnings, growth, etc.**
 - **Volunteers & donors**
 - Women in the arts

Arts Research Monitor

6

- **Evidence about arts disciplines**
 - Performing arts
 - Visual arts
 - Media arts
 - Reading, writing, publishing and literacy

- **Impacts of the arts**
 - Economic impacts
 - Social impacts
 - Arts and health

Statistical Insights on the Arts

7

30 reports in the series so far + 1 more in late March

- Volunteers in Arts and Culture Organizations (late March)
- Individual Donors to Arts and Culture Organizations
- A Statistical Profile of Artists in Canada
- Artists in Canada's Provinces and Territories
- Artists in Large Canadian Cities
- Artists in Small and Rural Municipalities
- Social Impacts of Culture

Other publications

8

- Senior Artists' Research Project

- Mapping Artists and Cultural Workers in Canada's Large Cities

Presentations

9

- Opportunity to combine information bits into new insights
 - Social Impacts of the Performing Arts
 - Spreading the arts bug: Ontario performing arts evidence
 - Cultural Research and Official Languages
and (online tomorrow) ...
 - A Sense of Prairie Place
- All available at www.HillStrategies.com

Profile and Significance: Evidence about . . .

10

- **Social, education and health impacts of the arts and culture**
 - brief summary of some research findings
- **Economic impact of the arts and culture**
 - Brief summary of some research findings

Profile and Significance: Evidence about . . .

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- **Arts and culture organizations**
 - Size and scope
 - Volunteers
 - Donors

- **Government spending on culture**
 - Total
 - Federal
 - Provincial
 - Municipal

Profile and Significance: Evidence about . . .

12

- **Artists and cultural workers**
 - Number, changes over time
 - Earnings

- Manitoba
- Francophone
- Aboriginal
- Winnipeg
- Smaller municipalities

Profile and Significance: Evidence about . . .

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- **Social, education and health impacts of the arts and culture**
 - brief summary of some research findings

Educational, social and health impacts

14

- Arts education
- Vibrant communities
- Health impacts

Arts education

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National Arts and Youth Demonstration Project

- McGill University Dept of Social Work
- Impacts of community-based arts programs
- ... on children in low-income communities

Arts education

16

Comparison of arts participants and control group of children

- Children participated well
- Children developed artistic skills
- Children behaved well in a social setting

Arts education

17

Comparison of arts participants and control group of children

- Increased confidence
- Fewer emotional problems
- Better conflict resolution skills
- Improved problem-solving skills

Arts education

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Critical Evidence: How the Arts Benefit Student Achievement

National Assembly of State Arts Agencies, 2006

Impacts in 6 areas

1. Reading and language skills
2. Mathematical skills
3. Thinking skills
4. Social skills
5. Motivation to learn
6. Positive school environment

Arts education

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Art, Artists and Teaching

J. Paul Getty Trust, 2006

“the arts help to promote both the creative abilities and cultural literacy that are critical to developing fully engaged citizens in the global society”.

Arts education

20

Art, Artists and Teaching

J. Paul Getty Trust, 2006

“Businesses need creative people in order to compete in today’s global economy”.

“... yet there is much more emphasis on math, science and other “hardcore” disciplines”.

Canadian research needs re: arts education

21

- How many children receive arts education?
- Which artforms, at what age?
- Which children receive, which don't?
- At school or elsewhere (or both)?
- How many arts teachers are there in primary and secondary schools?
- ... school librarians?
- ... arts consultants in Boards of Education?

Canadian research needs re: arts education

22

- What role do (can) arts organizations play in arts education? For which children? How could this happen?
- Are the benefits of arts education felt equally by different groups of children?
- What are the benefits for different groups of adults?

Vibrant communities

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Developing and Revitalizing Rural Communities through Arts and Culture

Creative City Network of Canada, 2009

Direct involvement in the arts, presence of artists and organizations, audience participation can help:

- Build interpersonal ties and promote volunteering;
- Reduce delinquency in high-risk youth;
- Relieve stress;
- Improve residents' sense of belonging and attachment;
- Build community identity and pride;

Vibrant communities

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Developing and Revitalizing Rural Communities through Arts and Culture

Direct involvement in the arts, presence of artists and organizations, audience participation can help:

- Build social networks;
- Increase tolerance of others;
- Foster “a creative milieu that spurs economic growth in creative industries”; and
- Increase the attractiveness of the area to tourists, businesses, new residents and investments.

Vibrant communities

25

From Bronze to Gold: A Blueprint for Canadian Leadership in a Transforming World

Canadian Council of Chief Executives, 2006

- "artistic and cultural creativity plays an important role in transforming communities into destinations of choice for skilled people in any occupation"

Vibrant communities

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From Bronze to Gold: A Blueprint for Canadian Leadership in a Transforming World

Canadian Council of Chief Executives

- "A community's cultural infrastructure has a direct impact on quality of life"...
- ... "and therefore on the competitiveness of communities in attracting people and investment"

Ten Characteristics of a Healthy Community: How the Arts Can Be Integrated

27

Americans for the Arts, 2002

1. The arts bring together **diverse people**
2. **Elected officials** understand the importance of supporting the arts and do so.
3. The arts are valued as a **critical component of learning** for all children and for adults.
4. Active participation in culture **creates individual and community meaning**.

Ten Characteristics of a Healthy Community: How the Arts Can Be Integrated

28

5. Business people and corporate citizens **recognize that the arts are important to a healthy business environment** and are involved in the arts in diverse ways.
6. The arts are infused in the **natural and built environments**
7. The arts are integral to **civic dialogue and community building**.

Ten Characteristics of a Healthy Community: How the Arts Can Be Integrated

29

8. The arts are valued as an industry because of their **contribution to the “new economy”** which encompasses quality of life, economic development, and tourism.
9. The **contributions of individual artists** are valued and supported.
10. The arts flourish with **new and diverse leadership** informed by those who paved the way for them.

Health impacts

30

Arts and Culture in Medicine and Health

(Canadian literature review of health impacts)

Cooley & Associates, January 2003

- creative arts therapies in modern medical treatment
- Public Health Agency of Canada’s “Key Determinants of Health”

Health impacts

31

Arts therapies

- Visual arts, dance, drama, music and poetry have been used to ...
 - reduce anxiety and tension in cardiac and surgery patients
 - reduce pain and discomfort
 - provide better physical surroundings for patients and their families
 - enhance the development of critically ill newborn children

Health impacts

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Key determinants of health

- Arts and culture play an important role in...
 - personal confidence
 - control
 - social connectedness
 - education
 - supportive physical environments

Profile and Significance: Evidence about . . .

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- **Economic impact of the arts and culture**
 - Brief summary of some research findings

Consumer spending on culture

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Consumer Spending on Culture in Canada in 2005

Hill Strategies Research, February 2007

Consumer spending on culture

...is more than consumer spending on ...

- Furniture
- Appliances
- Tools
- ... combined

Economic impacts of culture in Canada

35

Valuing Culture: Measuring and Understanding Canada's Creative Economy

Conference Board of Canada, 2009

- The arts and culture are “cornerstones of the creative, knowledge-based economy”
- Economic impact estimate of \$85 billion in 2007
- 7.4% of Canada's GDP

- 1.1 million jobs
- 7.1% of total employment in Canada

Economic impacts of culture in Canada

36

Valuing Culture ... conservative estimates

- Excludes video games and interactive media (not part of the Statistics Canada definition of culture used in the report)
- Excludes value of volunteer activity
- Did not attempt to estimate the impacts of ancillary spending (cultural attendees' spending on hotels, restaurants and transportation associated with cultural activities).
- Did not attempt to estimate the impacts of enhancing attractiveness for people and businesses.

Economic impacts of culture in Canada

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Valuing Culture

- Cultural sector generated approximately \$25 billion in taxes for all levels of government in 2007.
- More than three times higher than the \$7.9 billion that governments directly spent on culture in 2007.

- **No provincial estimates.**

Economic impacts of culture in Winnipeg

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Ticket to the Future, Phase 1: The Economic Impact of the Arts and Creative Industries in Winnipeg

PRA Inc. for the Winnipeg Arts Council, Nov. 2009

- Direct economic and social impact of Winnipeg's arts and creative industries
- GDP of Winnipeg's arts and creative industries is almost \$1 billion.
 - 3.7% of Winnipeg's economic output.

Economic impacts of culture in Winnipeg

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Ticket to the Future, Phase 1: The Economic Impact of the Arts and Creative Industries in Winnipeg

PRA Inc. for the Winnipeg Arts Council, Nov. 2009

- Workforce of about 25,000.
 - 6.3% of Winnipeg's overall workforce.
- Arts attendance is much higher than professional sports franchises.

Profile and Significance: Evidence about . . .

40

- **Arts and culture organizations**
 - Size and scope
 - Volunteers
 - Donors

Non-profit organizations

41

Source: 2003 National Survey of Non-Profit and Voluntary Organizations

Incorporated not-for-profit organizations (all types)

- 161,000 in Canada
- 56% are registered charities

- More than 8,000 in Manitoba
- 62% are registered charities

Arts and culture non-profits

42

International statistical definition includes...

- visual arts,
- architecture,
- ceramic art,
- performing arts,
- museums,
- zoos,
- aquariums,
- media and communications organizations, and
- historical, literary and humanistic societies.

Incorporated non-profit organizations in the arts and culture

43

- 13,800 in Canada
- 8.5% of all incorporated non-profits

- About 750 in Manitoba
- 9.1% of all incorporated non-profits

- No statistics on registered charities in the arts and culture (either Canada or Manitoba)

Arts and culture: Relatively small organizations

44

Canada

- Revenues of \$3.4 billion
- Average revenues of \$250,000
- All non-profits: average of about \$700,000
- Arts and culture rank 12th out of 14 types of organizations
- Closest to environmental organizations (\$256,000)

Arts and culture: Relatively small organizations

45

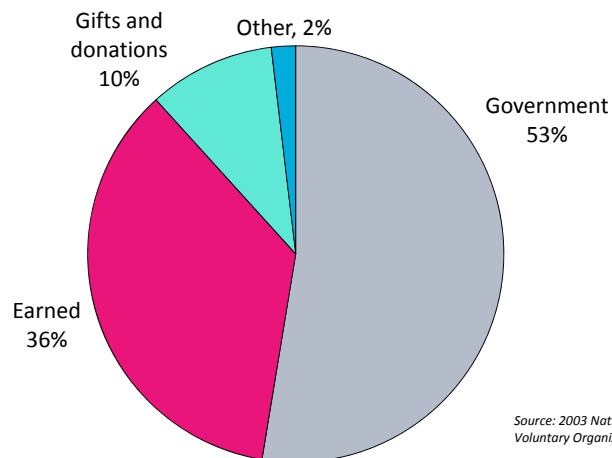
Manitoba (Kelly's estimates based on "Manitoba, Saskatchewan and three territories")

- Revenues of \$400 million
- Average revenues of \$240,000
- All non-profits: average of about \$730,000

Lower government revenues in the arts and culture

46

Revenue sources of all incorporated non-profit organizations, Manitoba, 2003

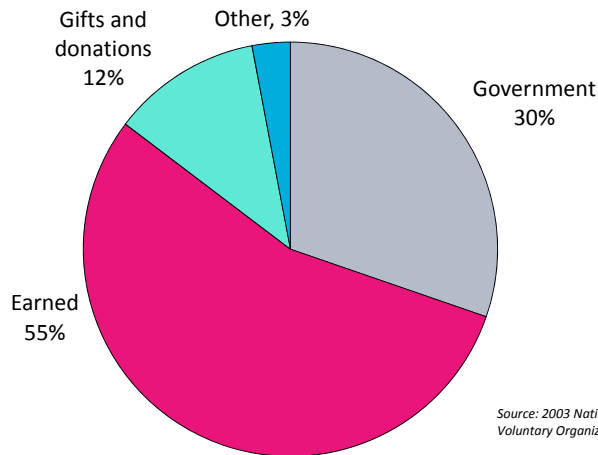


Source: 2003 National Survey of Non-Profit and Voluntary Organizations

Lower government revenues in the arts and culture

47

Revenue sources of incorporated, non-profit arts and culture organizations, Manitoba, 2003



Staffing: Mostly temporary jobs in the arts and culture

48

Canada

- Total staff of 73,000
- Full-time staff of 41,000
- Part-time staff of 32,000 (44%)
- *Two-thirds are temporary staffers*

Manitoba (estimates based on "Manitoba, Saskatchewan and three territories")

- Total staff of over 3,000
- Full-time staff over 2,000
- Part-time staff of 1,000 (about one-third)

Many more volunteers than staff in the arts and culture

49

Canada

- Total staff of 73,000
- Volunteers: 700,000 (2007 survey)
- 63% have no paid staff

Manitoba (Kelly's estimates based on "Manitoba, Saskatchewan and three territories")

- Total staff of over 3,000
- Volunteers: over 20,000 (2007 survey)

We got issues!

50

Non-profit organizations: 19 different problems they might encounter

- Arts and culture organizations: higher percentage reporting problems than all non-profits
- ... in 18 of the 19 different problem areas

We got issues!

51

Arts and culture organizations: Particular problems

- obtaining funding from government, foundations or corporations (70% of organizations);
- planning for the future (67%); and
- recruiting the type of volunteers the organization needs (64%)

Arts and culture donors and volunteers

52

Source: 2007 Canada Survey of Giving, Volunteering and Participating

- Statistics Canada surveyed a statistically representative sample of Canadians 15 and older (20,510 people)
- about their financial gifts and volunteer activity
- in all types of not-for-profit organizations in the 12 months preceding the survey

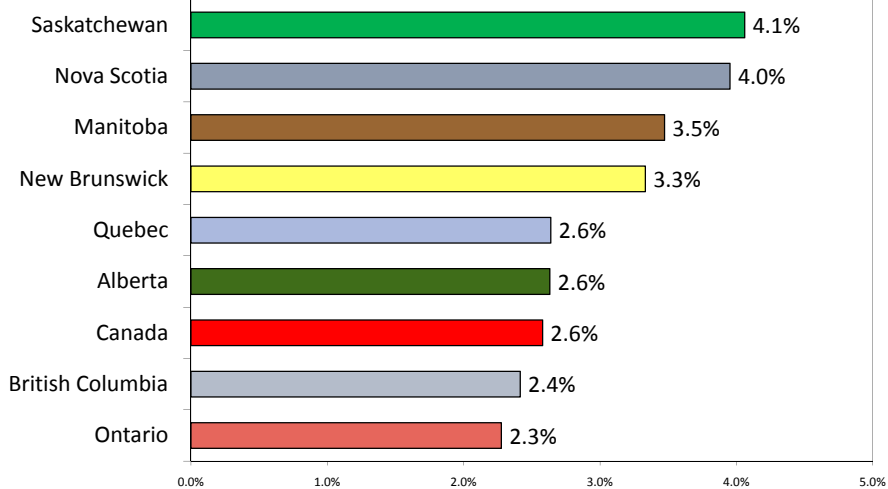
Arts and culture donors and volunteers

53

“Volunteer rate” and “donation rate”

- Percentage of population 15 and older volunteering or donating in arts and culture organizations

Arts and culture volunteer rate by province, 2007



Note: The statistics for Prince Edward Island and Newfoundland and Labrador are not included in this analysis because of their relatively high margins of error.

Arts and culture donors

55

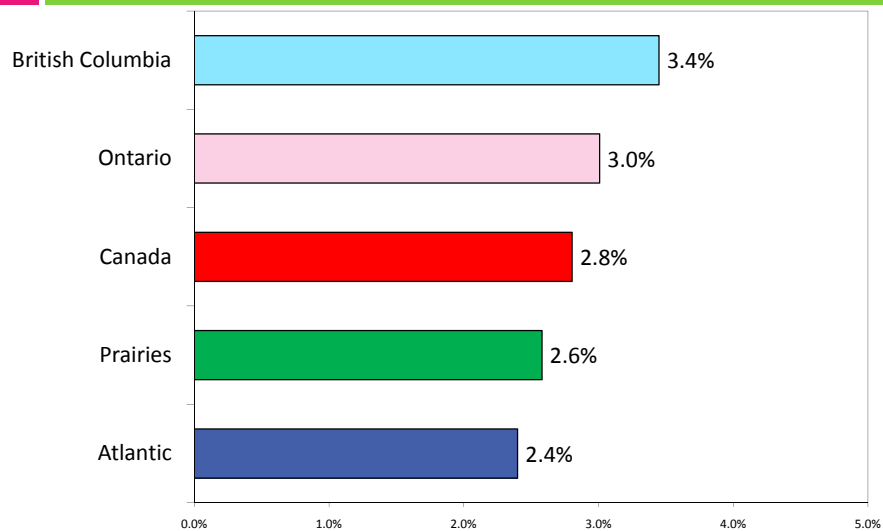
Canada

- 759,000 donors
 - 3.3% of all donors
- Donations worth \$101 million
 - 1.0% of all donations

3 Prairie provinces

- 117,000 donors
 - 3.0% of all donors
- Donations worth about \$17 million
 - 0.8% of all donations

Arts and culture donor rate by region, 2007



Profile and Significance: Evidence about . . .

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- Government spending on culture
 - Total
 - Federal
 - Provincial
 - Municipal

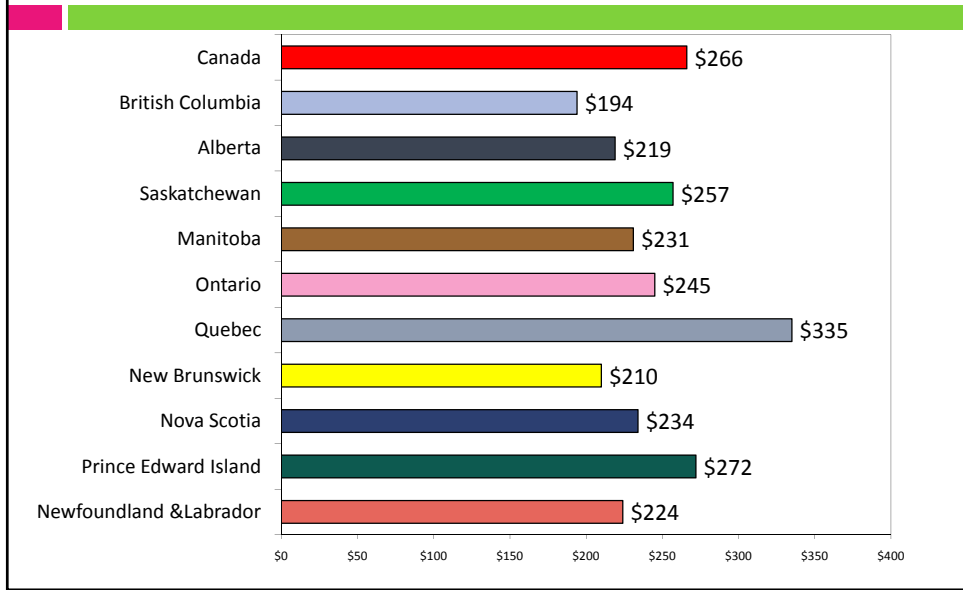
Government spending on culture, 2006-07

58

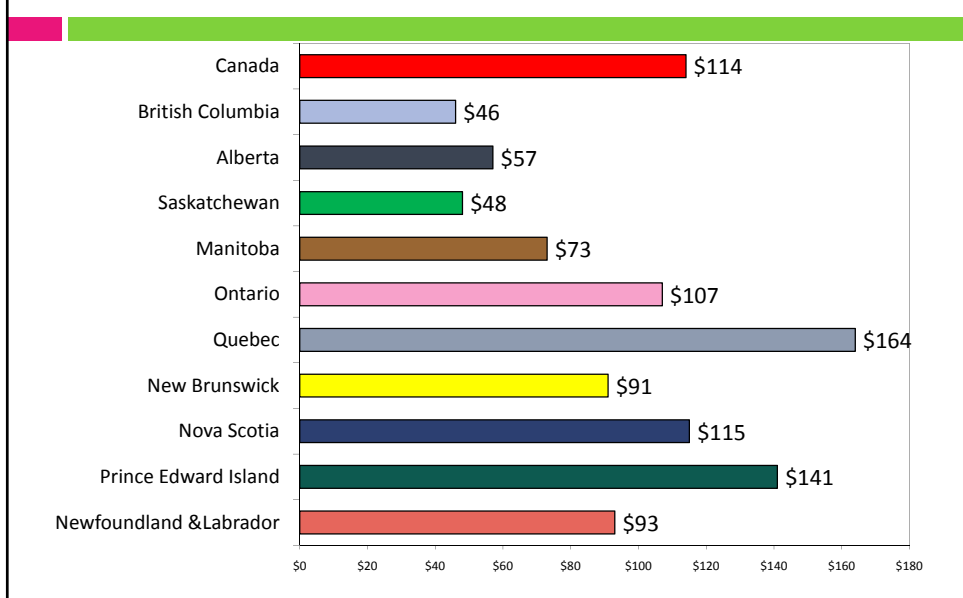
Source:

Government expenditures on culture, 2006-07
Statistics Canada, July 2009

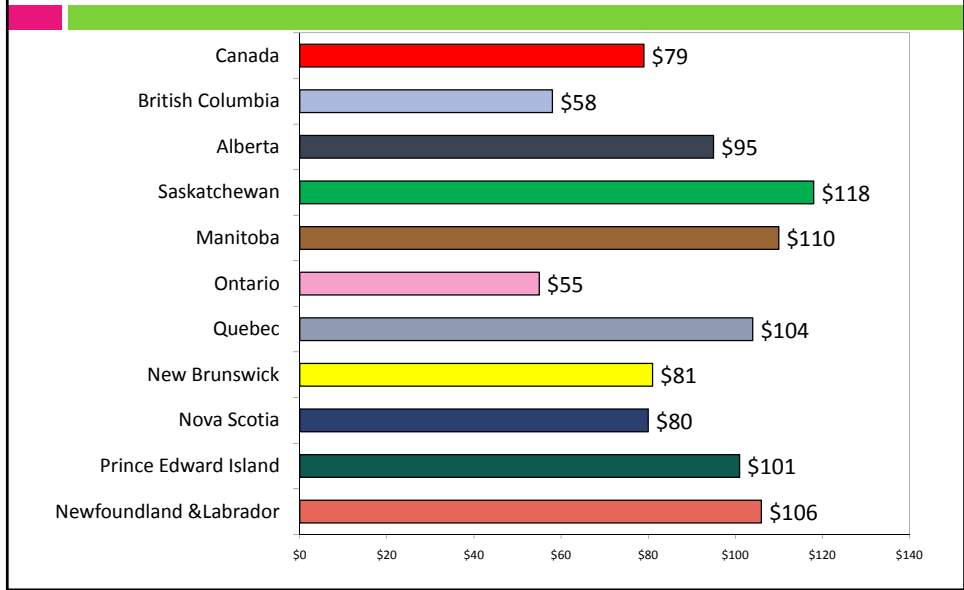
Government spending per capita (all levels) by province, 2006-07



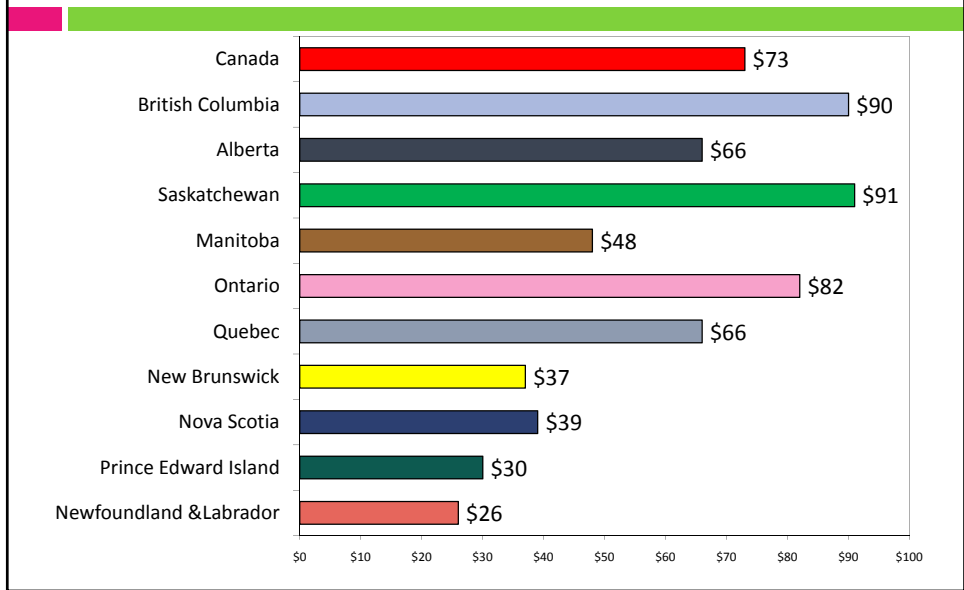
Federal government spending per capita by province, 2006-07



Provincial government spending per capita by province, 2006-07



Municipal government spending per capita by province, 2006-07



Profile and Significance: Evidence about . . .

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- **Artists and cultural workers**
 - Number, changes over time
 - Earnings

 - Manitoba
 - Francophone
 - Aboriginal
 - Winnipeg
 - Smaller municipalities

Artists and cultural workers

64

- Percentage of local labour force in 9 arts occupations and 48 cultural occupations

- In Canada, provinces, larger cities, small municipalities and, most recently, neighbourhoods

- Occupation based on the job (employed or self-employed) at which someone worked the most hours between May 7 and 13, 2006.
- Must have earned some money from employment in 2005.
- Earnings data includes all jobs worked in 2005.

“Artists”: 9 arts occupations

65

- Visual arts and crafts:
 1. Painters, sculptors and other visual artists;
 2. Artisans and craftspersons;

- Writing:
 3. Authors and writers.

“Artists”: 9 arts occupations

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- Performing arts and film:
 4. Actors and comedians;
 5. Conductors, composers and arrangers;
 6. Dancers;
 7. Musicians and singers;
 8. Other performing artists (circus, puppeteers, etc.);
 9. Producers, directors, choreographers and related occupations;

Artists are under-counted

67

- Census: Most hours between May 7 and 13, 2006.
- Waging Culture (2009 study of Canadian visual artists)
- Estimate of visual artists that is 30% to 60% larger than census estimates
- Australian report: Don't Give Up Your Day Job
- "almost two-thirds of Australian professional artists have more than one job."

Occupation codes and industry codes

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- Occupation codes
 - Needed to count artists (Hill Strategies)
 - Based on artistic or cultural nature of the work, not the fact that people work in a cultural organization or industry
 - E.g., a dancer working in a private dance school
 - Excludes: personnel who do essential work in culture, but whose work is not inherently "cultural" (e.g., a bookkeeper working in a cultural organization)
- Industry codes
 - Broad range of workers (e.g., admin staff) within cultural organizations and industries (Winnipeg Economic Impact)
 - Excludes cultural workers who work outside the selected industries

Cultural workers: 48 occupations

69

- Architecture, Design, Crafts and Visual Arts
 - Architects
 - Architectural technologists and technicians
 - Artisans and craftspersons
 - Camera, platemaking and other pre-press occupations
 - Drafting technologists and technicians
 - Graphic arts technicians
 - Graphic designers and illustrators
 - Industrial designers
 - Interior designers
 - Landscape and horticultural technicians and specialists
 - Landscape architects
 - Painters, sculptors and other visual artists
 - Patternmakers, textile, leather and fur products
 - Photographers
 - Photographic and film processors
 - Theatre, fashion, exhibit and other creative designers

Cultural workers: 48 occupations

70

- Archives, Libraries and Heritage
 - Archivists
 - Conservators and curators
 - Librarians
 - Library and archive technicians and assistants
 - Library clerks
 - Library, archive, museum and art gallery managers
 - Supervisors, library, correspondence and related information clerks
 - Technical occupations related to museums and galleries
- Music and Sound Recording
 - Audio and video recording technicians
 - Conductors, composers and arrangers
 - Musicians and singers

Cultural workers: 48 occupations

71

- A/V and Live Performing Arts
 - Actors and comedians
 - Announcers and other broadcasters
 - Broadcast technicians
 - Dancers
 - Film and video camera operators
 - Managers in publishing, motion pictures, broadcasting and performing arts
 - Other performers
 - Other technical occupations in motion pictures, broadcasting and the performing arts
 - Producers, directors, choreographers and related occupations
 - Support occupations in motion pictures, broadcasting and the performing arts

Cultural workers: 48 occupations

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- Writing and Publishing
 - Authors and writers
 - Binding and finishing machine operators
 - Correspondence, publication and related clerks
 - Desktop publishing operators and related occupations
 - Editors
 - Journalists
 - Printing machine operators
 - Printing press operators
 - Professional occupations in public relations and communications
 - Supervisors, printing and related occupations
 - Translators, terminologists and interpreters

Artists and cultural workers in Canada

73

- 140,000 artists in Canada who spent more time at their art than at any other occupation in May 2006
- 135,000 Canadians directly employed in the automotive industry
- 609,000 cultural workers
- 3.3% of the overall labour force in Canada
- about double the level of employment in the forestry sector (300,000)
- More than double the level of employment in Canadian banks (257,000)

Artists and cultural workers in Manitoba

74

- 3,900 artists in Manitoba
- Slightly lower percentage of its labour force in arts occupations (0.60%) than the Canadian average (0.77%).
- 18,500 cultural workers in Manitoba
- 2.8% of the overall provincial labour force

Artists and cultural workers in Manitoba

75

- Number of artists increased by 8% between 1991 and 2006
- Lower than the increase in the overall provincial labour force (11%)
- Artists: 9% increase between 1991 and 2001
- 2% decrease between 2001 and 2006

Characteristics of artists in Manitoba

76

- Earnings are low
- Artists: \$18,300
- Cultural workers: \$29,500
- Overall labour force: \$31,300

- Artists: 41% less than overall labour force average
- Comparisons: Canada (37%), Saskatchewan (50%), Alberta (52%), Ontario (38%)

Characteristics of artists in Manitoba

77

- More women (2,200) than men (1,700)
- High education: 32% with a bachelor's degree or higher
- Overall labour force: 18%

- High rate of self-employment: 43%
- Overall labour force: 8%

- Little full-year work: 47% worked full-time for 40 to 52 weeks
- Overall labour force: 62%

Characteristics of artists in Manitoba

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Wide range of artists

- Largest occupation is musicians and singers: 1,200 (32%, typical of Prairie provinces)
- Artisans and craftspersons: 565 (14%)
- Authors and writers: 500 (13%)
- Producers, directors, choreographers and related occupations: 440 (11%)
- Painters, sculptors, other visual artists: 480 (12%)
- Actors and comedians: 350 (9%)

Characteristics of artists in Manitoba

79

- Next generation: 37% under 35 years of age
- Overall labour force: 36%

- Aging population: 24% age 55 or older
- Overall labour force: 19%

Characteristics of artists in Manitoba

80

Language statistics

- 81% English
- 19% bilingual English/French

- Francophone home language: 3% of artists

Characteristics of artists in Manitoba

81

Aboriginal artists

- 8% of Manitoba artists
- 9% of Winnipeg artists

Winnipeg artists and cultural workers

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Winnipeg: 7th highest number of artists of Canadian cities

- Toronto: 22,300
- Montreal: 13,400
- Vancouver: 8,200
- Calgary: 5,100
- Ottawa: 4,600
- Edmonton: 3,300
- **Winnipeg: 2,900**
- Mississauga: 2,300
- Halifax: 2,200
- Quebec City: 2,100

Characteristics of artists in Winnipeg

83

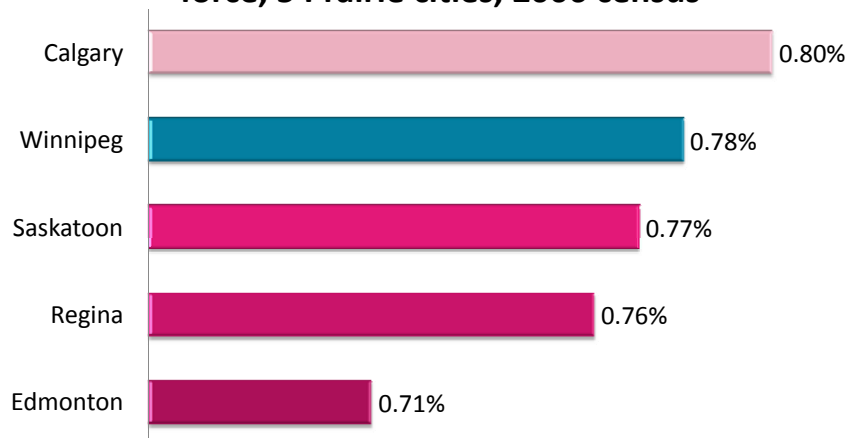
Wide range of artists

- Largest occupation is musicians and singers: 880 (30%, typical of medium-sized cities)
- Authors and writers: 405 (14%)
- Producers, directors, choreographers and related occupations: 375 (13%)
- Artisans and craftspersons: 335 (12%)
- Painters, sculptors, other visual artists: 315 (11%)
- Actors and comedians: 310 (11%)

Winnipeg artists and cultural workers

84

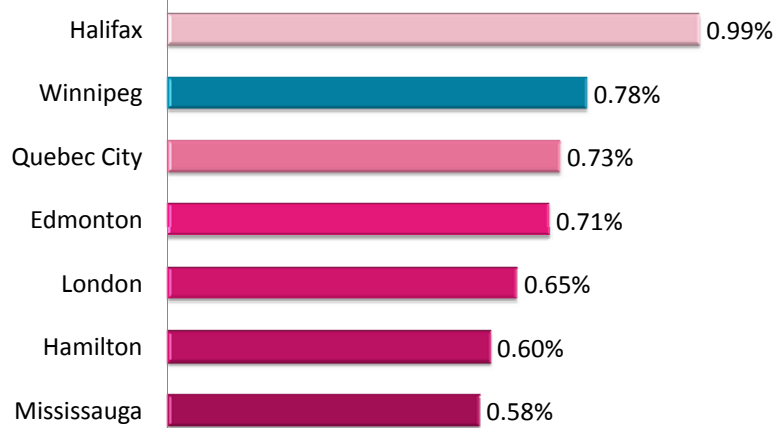
Artists as percentage of the local labour force, 5 Prairie cities, 2006 census



Winnipeg artists and cultural workers

85

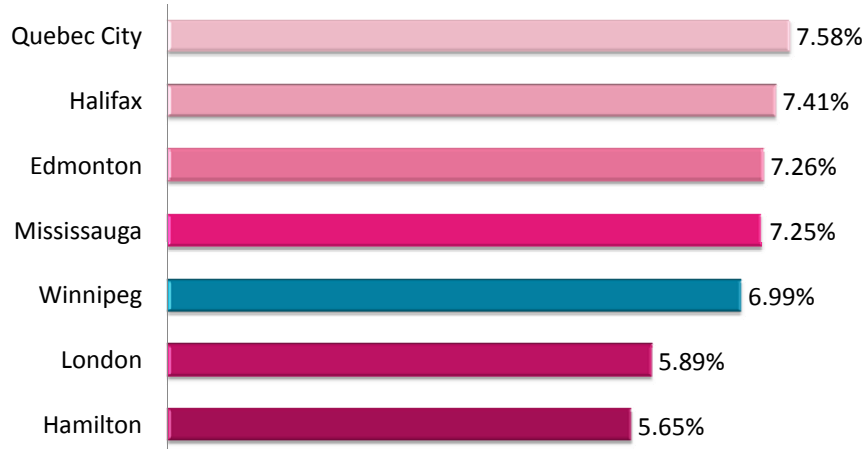
Artists as percentage of the local labour force, mid-sized Canadian cities, 2006 census



Winnipeg artists and cultural workers

86

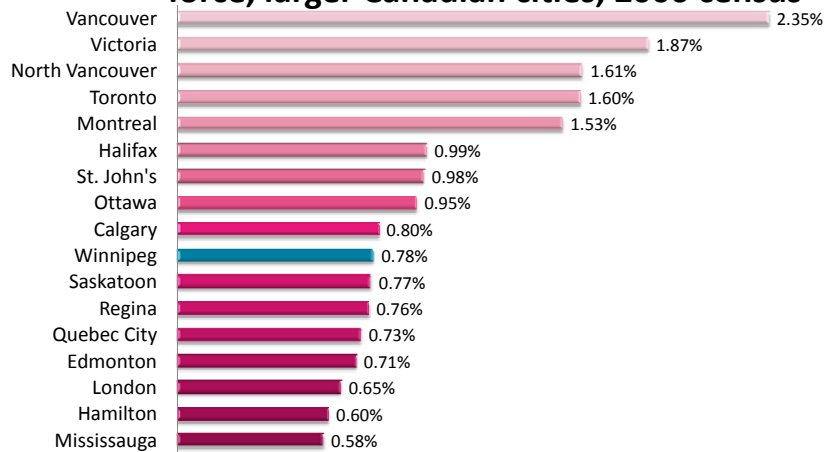
Cultural workers as percentage of the local labour force, mid-sized Canadian cities, 2006 census



Winnipeg artists and cultural workers

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Artists as percentage of the local labour force, larger Canadian cities, 2006 census



Winnipeg artists and cultural workers

88

- Number of artists increased by 10% between 1991 and 2006
- Equal to the increase in the local labour force (10%)
- But: recent decrease (-2% between 2001 and 2006).

Regional artists and cultural workers

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Small municipality with the highest concentration of artists on the Prairies

- Steinbach (1.06%)
□ 65 artists / 6,160 local labour force
- 5th on the Prairies: St. Clements (0.87%)
□ 55 artists / 6,305 local labour force

Regional artists and cultural workers

90

Other Manitoba municipalities

- Taché (0.73%)
□ 40 artists / 5,510 local labour force
- Springfield (0.56%)
□ 45 artists / 8,100 local labour force
- Brandon (0.44%)
□ 110 artists / 25,245 local labour force

Conclusion

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Other possible indicators...

- Presence of formal and informal cultural districts
- Amateur participation in the arts
- Business support for the arts
- Cultural tourism levels
- Relationship to other public priorities
 - Health
 - Crime
 - Social services
 - Education

Conclusion

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- **Many key issues persist in the arts and culture**
 - Finances
 - Artists' earnings
 - Audiences
 - Human resources
 - "Making the case"



THANK YOU!

Kelly Hill

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