

# 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](http://HillStrategies.com)

## Arts Research Monitor

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

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- **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](http://www.HillStrategies.com)

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

## Profile and Significance: Evidence about . . .

11

- **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

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- Arts education
- Vibrant communities
- Health impacts

## Arts education

15

### **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

19

### **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

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### **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

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- 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

26

### **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

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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

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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

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### 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

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### 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

38

### **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

39

### **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 12<sup>th</sup> out of 14 types of organizations
- Closest to environmental organizations (\$256,000)

## Arts and culture: Relatively small organizations

45

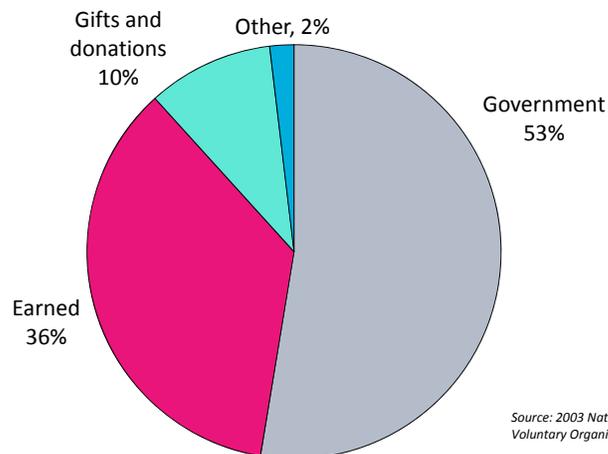
***Manitoba (Kelly's estimates based on "Manitoba, Saskatchewan and three territories")***

- 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**

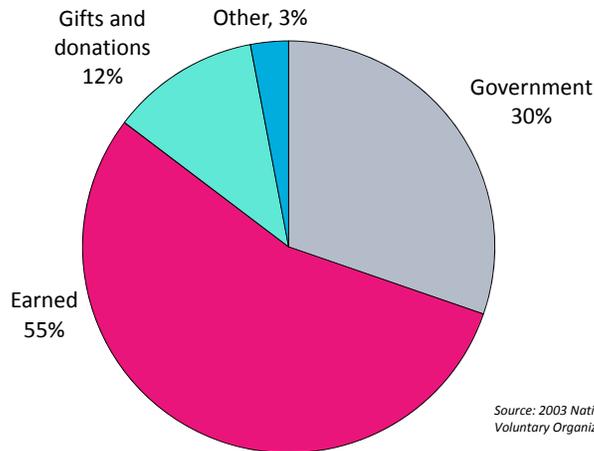


Source: 2003 National Survey of Non-Profit and Voluntary Organizations

## 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

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### **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

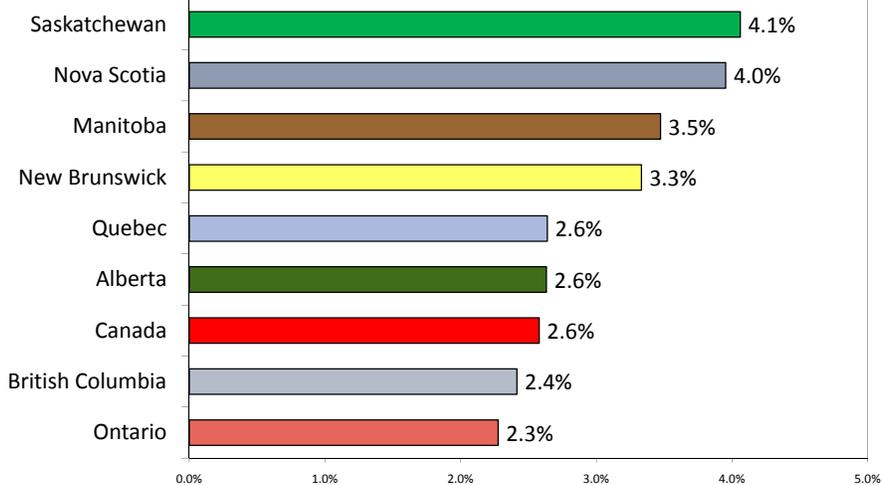
## Arts and culture donors and volunteers

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

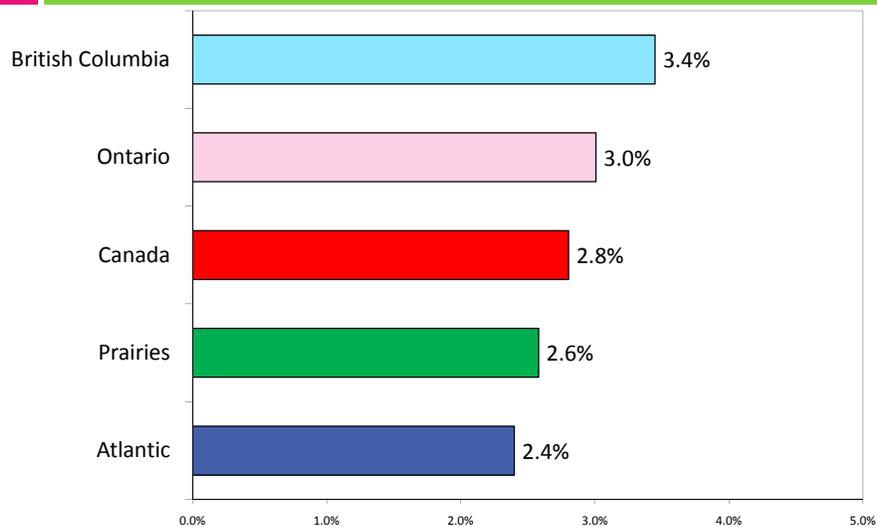
### **Canada**

- 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

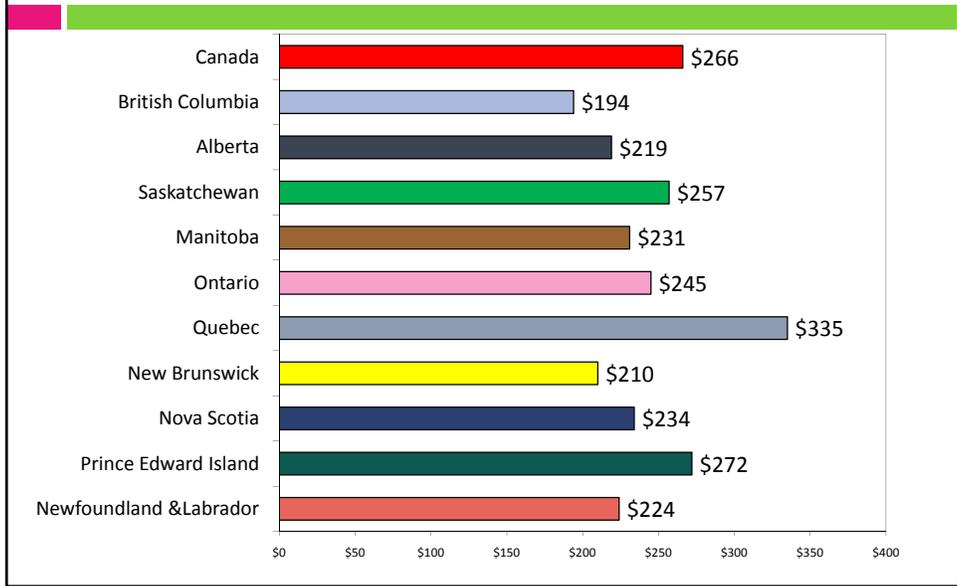
## Government spending on culture, 2006-07

58

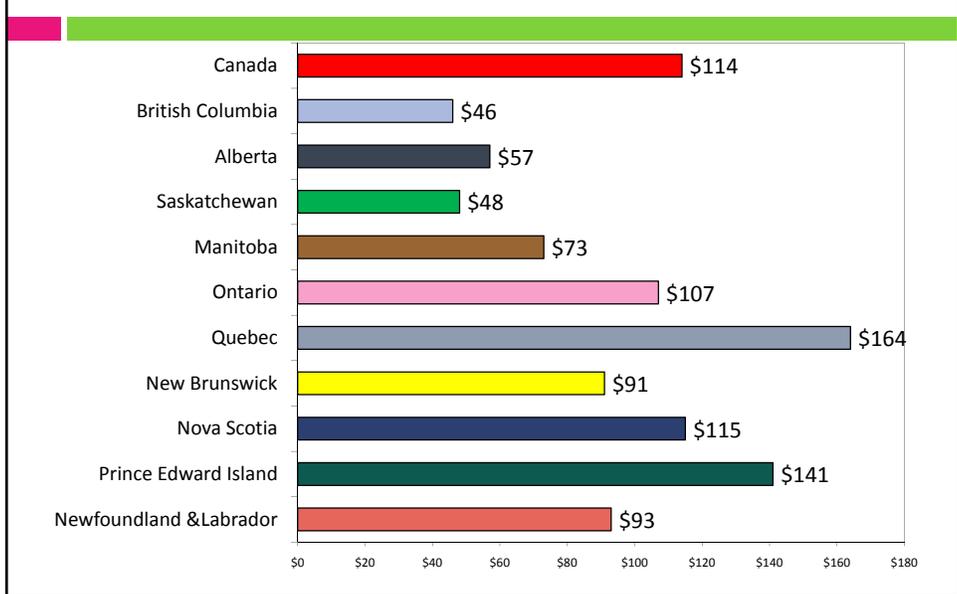
**Source:**

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

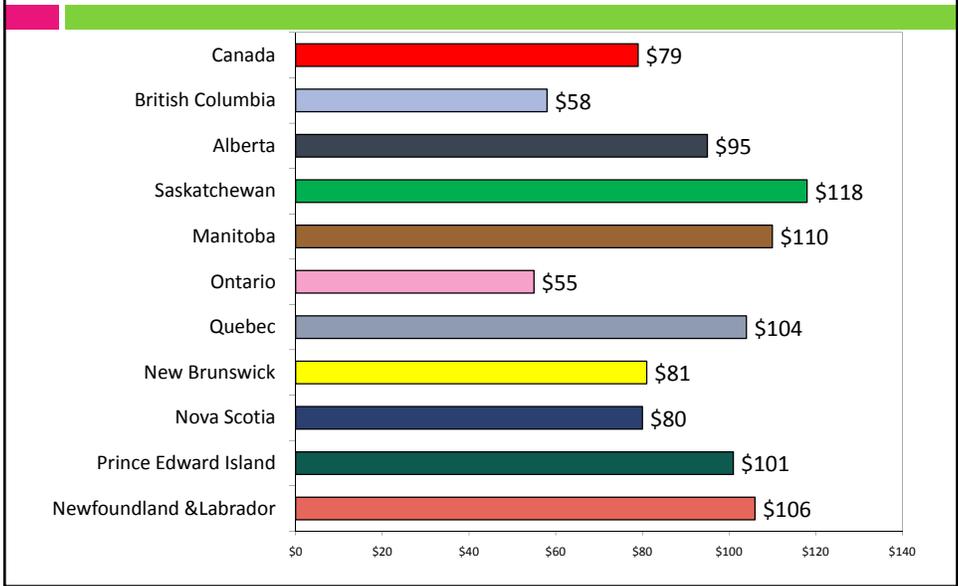
### Government spending per capita (all levels) by province, 2006-07



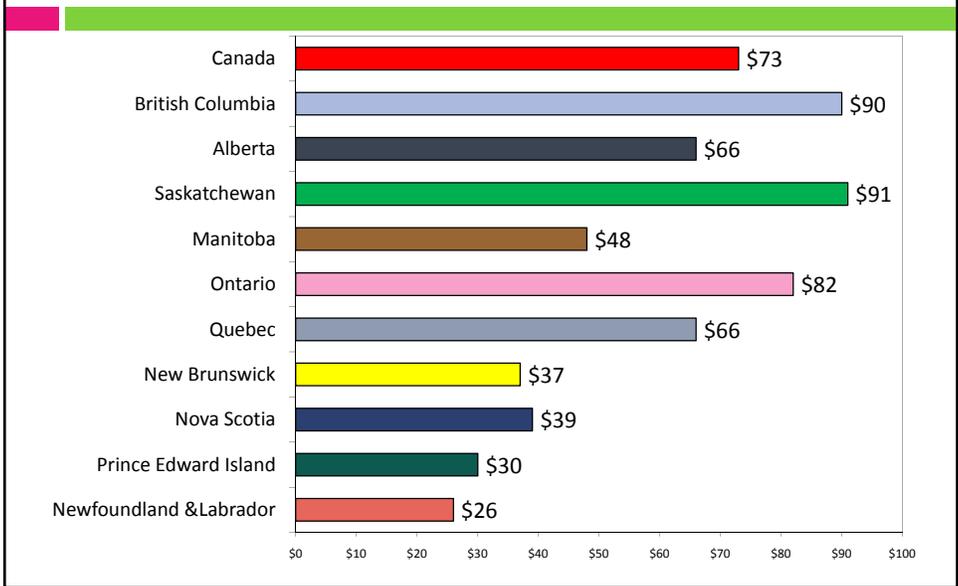
### Federal government spending per capita by province, 2006-07



### 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

66

- 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

68

- 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

72

- 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

78

### 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: 7<sup>th</sup> 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

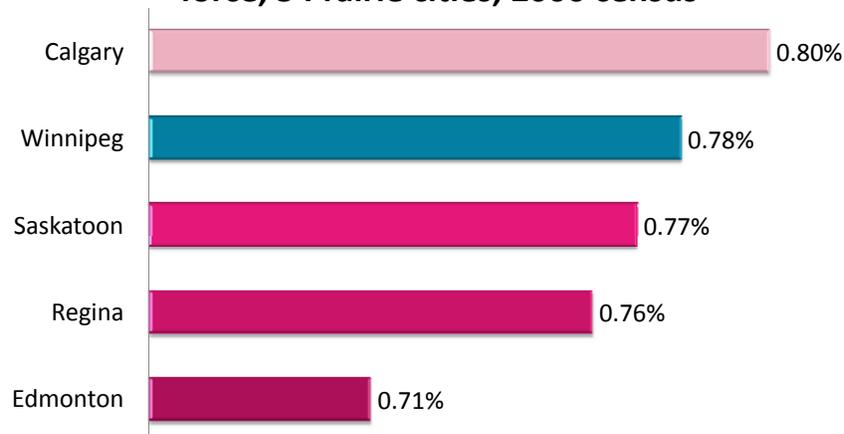
### Wide range of artists

- 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

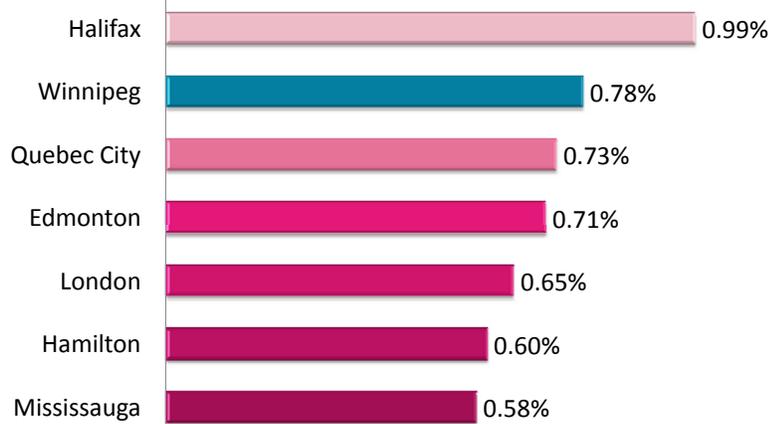
### Artists as percentage of the local labour force, 5 Prairie cities, 2006 census



## Winnipeg artists and cultural workers

85

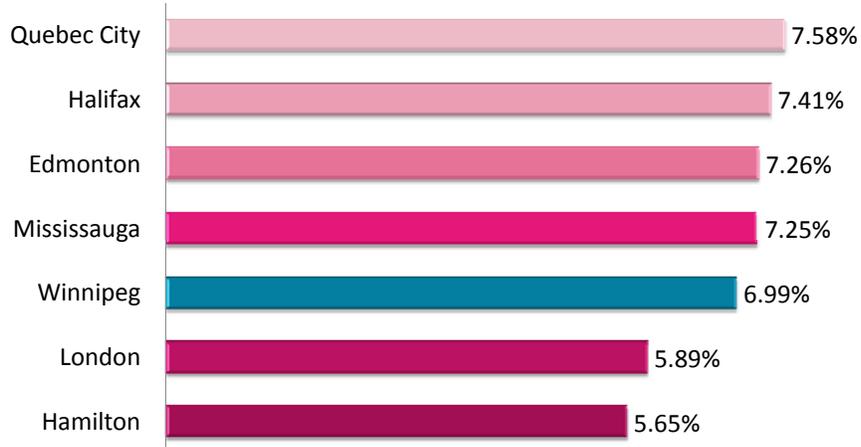
**Artists as percentage of the local labour force, mid-sized Canadian cities, 2006 census**



## Winnipeg artists and cultural workers

86

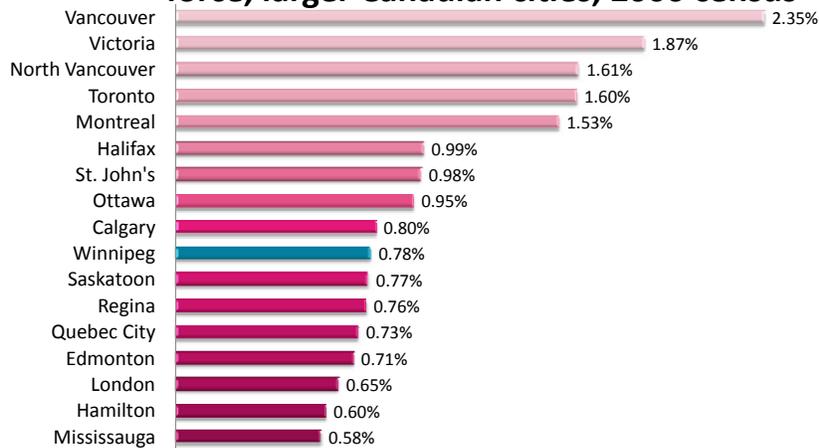
**Cultural workers as percentage of the local labour force, mid-sized Canadian cities, 2006 census**



## Winnipeg artists and cultural workers

87

### 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

89

### Small municipality with the highest concentration of artists on the Prairies

- Steinbach (1.06%)  
□ 65 artists / 6,160 local labour force
- 5<sup>th</sup> 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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