Canadian Arts, Culture and Creative Sector
Compendium of Key Statistics

VOLUME II: ECONOMIC IMPACT

*Fully updated and including:
- Summary of findings from the Canadian Culture Satellite Account
- Summary of findings from the Provincial and Territorial Culture Satellite Account
- Spotlight on the Creative Occupations, based on NHS 2011 Data

DECEMBER 2015
ARTSCAPE
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Canadian Arts, Culture and Creative Industry Compendium of Key Statistics
Volume II: Economic Impact

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1. Introduction

The activity of the Canadian artistic, cultural, and creative sector has historically been inconsistently defined and measured. A range of players – governments, agencies, and organizations – have spoken with different voices with respect to the makeup, size, and impact of arts, culture, and creative occupations and industries. As a result, it has proven to be difficult to speak clearly about, and to locate the sources for facts related to the scale, impact, and state of what is an important and growing sector.

This Compendium is intended to compile and organize key statistics, from recognized sources, related to the Canadian arts, culture, and creative sector, and to share this work as a consolidated resource that will be regularly updated as new data becomes available. The Compendium assembles national data, while also focusing on sector activity in Ontario and Toronto.

The Compendium is presented in three volumes:

- **Volume 1: Sector Characteristics**
  This Volume looks at the characteristics of those working in cultural occupations, including size and growth of the sector, age, gender, education, and income. Volume 1 includes a spotlight on a group of 19 National Occupation Codes that Artscape refers to as the ‘Core Creative Occupations’.

- **Volume 2: Economic Impact**
  This volume considers the impact of the creative economy, from the standpoints of both GDP and jobs. Volume 2 also looks at the growth of employment in creative industries and cultural occupations, and the impacts derived from cultural tourism and Toronto’s major cultural festivals.

- **Volume 3: Location and Place**
  This volume approaches creative activity in Canada from the standpoint of spatial organization, focusing on measures of sector concentration, particularly in the City of Toronto and the Greater Toronto Area.

Recent Developments in Canadian Culture Statistics

- In 2014, Statistics Canada released the first findings from the Canadian Culture Satellite Account (CSA), providing measures of the economic contribution of culture and sport in Canada. The CSA considers the economic importance of culture in terms of output, GDP, and employment, for the year 2010. It also measures economic importance from two perspectives:
  - Product: which measures culture and sport output, in terms of product, regardless of whether the producing establishments were in culture or non-culture industries.
  - Industry: which measures the output of culture or sport industries, regardless of whether they are producing non-culture and non-sport products.

The first national CSA figures were released in September 2014, followed by provincial/territorial figures in June 2015. New CSA figures are anticipated to be released annually, with the next release expected in the spring of 2016.

- Over 2013 and 2014, Statistics Canada released data from the 2011 National Household Survey, including sortable data tables. These tables allow for analysis of the employed labour force working
in occupations from the CFCS, considering characteristics such as gender, income, and education at national, provincial, and census metropolitan area geographies.

Principal Sources
The data in this section is largely drawn from the following sources:

- Research and analysis undertaken by Artscape, based on NHS 2011 data tables and custom tabulations.
- Various reports on the activity and characteristics of artists and cultural workers in Canada prepared by Hill Strategies, including:
  - A Statistical Profile of Artists and Cultural Workers in Canada, 2014
  - Artists and Cultural Workers in Canada’s Provinces and Territories, 2014
  - Educating Artists, 2015
- Cultural HR Study 2010, by the Cultural Human Resources Council (CHRC)

An Explanation of Terms
Hill Strategies and CHRC use several terms to describe the broader sector, or aspects of it, referring alternately to cultural workers, artists and cultural occupations. In brief, the intended meanings of those terms follow below:

- **Artists**: as used by Hill Strategies, Artists refer to the members of the Experienced Labour Force classified into nine arts occupations (actors and comedians; artisans and craftspersons; authors and writers; conductors, composers, arrangers; dancers; musicians and singers; other performers; producers, directors, choreographers; visual artists).

- **Cultural Workers**: as used by Hill Strategies, Cultural Workers refer to members of the Experienced Labour Force classified into 50 occupations codes, including heritage occupations, cultural occupations, and the nine arts occupations. Individuals that classified as belonging to a cultural occupation spent more time at that occupation than at any other occupation in May of 2011, when NHS survey data were collected.

- **Cultural Occupations**: as used by CHRC, refers to occupations in which most of the work done within a specific occupational code is directly tied to creating or adding value to a cultural good or service. CHRC uses the same occupations set out in Statistics Canada’s Canadian Framework for Cultural Statistics (2004), excluding manufacturing occupations (such as typesetters, printing press operators, and photographic and film processors).
2. GDP – Cultural Satellite Account (National) ¹

From the CSA, viewed from the product perspective:

- Culture GDP at basic prices equaled $47.8 billion, contributing 3.1% to Canada’s GDP in 2010.
- Culture output totaled $93.2 billion or 3.0% as a share of total economy.
- The largest contributors to culture GDP were: Audio-visual and interactive media ($14.8 billion), Visual and applied arts ($10.2 billion) and Written and published works ($10.0 billion).

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**Figure 1: Culture Gross Domestic Product, by Domain, Canada, 2010 (product perspective)**

<table>
<thead>
<tr>
<th>Domain</th>
<th>Millions of Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio-visual and interactive media</td>
<td>$14,797</td>
</tr>
<tr>
<td>Visual and applied arts</td>
<td>$10,157</td>
</tr>
<tr>
<td>Written and published works</td>
<td>$10,032</td>
</tr>
<tr>
<td>Governance, funding and professional support</td>
<td>$5,722</td>
</tr>
<tr>
<td>Education and training</td>
<td>$3,400</td>
</tr>
<tr>
<td>Live performance</td>
<td>$1,903</td>
</tr>
<tr>
<td>Heritage and libraries</td>
<td>$781</td>
</tr>
<tr>
<td>Sound recording</td>
<td>$568</td>
</tr>
<tr>
<td>Multi¹</td>
<td>$481</td>
</tr>
</tbody>
</table>

Source: Canadian Cultural Satellite Account (2010), 2014, Statistics Canada
From the CSA, viewed from the industry perspective:

- GDP of culture industries was $53.2 billion in 2010, contributing 3.4% to Canada’s total GDP. Of this, culture products accounted for $40.7 billion and other products (i.e., non-culture products) $12.5 billion.
- Culture industries accounted for 3.2% ($99.3 billion) of the total production in Canada.
- The largest contributors to the GDP of culture industries (presented by domain) were: Audio-visual and interactive media ($13.8 billion) followed by Visual and Applied Arts ($13.4 billion), Written and published works ($10.1 billion), and Governance, funding and professional support ($8.0 billion).

**Figure 2: Culture Gross Domestic Product, by Domain, Canada, 2010 (industry perspective)**

<table>
<thead>
<tr>
<th>Domains</th>
<th>Millions of Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio-visual and interactive media</td>
<td>$13,787</td>
</tr>
<tr>
<td>Visual and applied arts</td>
<td>$13,393</td>
</tr>
<tr>
<td>Written and published works</td>
<td>$10,147</td>
</tr>
<tr>
<td>Governance, funding and professional support</td>
<td>$7,963</td>
</tr>
<tr>
<td>Education and training</td>
<td>$4,261</td>
</tr>
<tr>
<td>Live performance</td>
<td>$2,008</td>
</tr>
<tr>
<td>Heritage and libraries</td>
<td>$598</td>
</tr>
<tr>
<td>Multi¹</td>
<td>$557</td>
</tr>
<tr>
<td>Sound recording</td>
<td>$507</td>
</tr>
</tbody>
</table>

*Source: Canadian Cultural Satellite Account (2010), 2014, Statistics Canada*
3. GDP – Cultural Satellite Account (Provincial / Territorial) ²

• Based on the Provincial and Territorial Cultural Satellite Account, the direct economic impact of Ontario’s cultural products, in 2010, was $22 billion – 3.7% of Ontario’s GDP.
• The direct impact of cultural products (product perspective) and of cultural industries (industry perspective, including, for each province and territory, can be seen in the table below (note: industry perspective includes the value of culture products and other products produced by those industries).

<table>
<thead>
<tr>
<th>Provinces and Territories</th>
<th>Product Perspective (Culture GDP)</th>
<th>Industry Perspective (GDP of Culture Industries)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alberta</td>
<td>$4,700,000,000</td>
<td>$5,500,000,000</td>
</tr>
<tr>
<td>British Columbia</td>
<td>$5,700,000,000</td>
<td>$6,100,000,000</td>
</tr>
<tr>
<td>Manitoba</td>
<td>$1,400,000,000</td>
<td>$1,400,000,000</td>
</tr>
<tr>
<td>New Brunswick</td>
<td>$641,000,000</td>
<td>$628,000,000</td>
</tr>
<tr>
<td>Newfoundland</td>
<td>$379,000,000</td>
<td>$424,000,000</td>
</tr>
<tr>
<td>Northwest Territories</td>
<td>$64,000,000</td>
<td>$66,000,000</td>
</tr>
<tr>
<td>Nova Scotia</td>
<td>$868,000,000</td>
<td>$1,100,000,000</td>
</tr>
<tr>
<td>Nunavut</td>
<td>$53,000,000</td>
<td>$56,000,000</td>
</tr>
<tr>
<td>Ontario</td>
<td>$21,900,000,000</td>
<td>$23,800,000,000</td>
</tr>
<tr>
<td>Prince Edward Island</td>
<td>$121,000,000</td>
<td>$190,000,000</td>
</tr>
<tr>
<td>Quebec</td>
<td>$10,900,000,000</td>
<td>$12,800,000,000</td>
</tr>
<tr>
<td>Saskatchewan</td>
<td>$854,000,000</td>
<td>$1,200,000,000</td>
</tr>
<tr>
<td>Yukon</td>
<td>$46,000,000</td>
<td>$48,000,000</td>
</tr>
</tbody>
</table>

Source: Provincial and Territorial Cultural Satellite Account, 2015, Statistics Canada

• Culture GDP – the direct economic impact of culture products – as a share of provincial/territorial GDP was highest in Ontario (3.7% of provincial GDP), followed by Quebec (3.5%), British Columbia (3.0%) and Manitoba (2.9%).
• GDP of culture industries as a share of provincial/territorial GDP was highest in Quebec (4.1% of provincial GDP), follow by Ontario (4.0%), Prince Edward Island (3.9%), and Nova Scotia (3.4%). As mentioned above, the industry perspective includes the impact of both culture products and other products produced by cultural industries.
Figure 4: Culture GDP as Share of Provincial/Territorial Economy (2010)

Source: Chart by Artscape, based on Provincial and Territorial Cultural Satellite Account, 2015, Statistics Canada

Figure 5: GDP of Culture Industries as Share of Provincial/Territorial Economy (2010)

Source: Chart by Artscape, based on Provincial and Territorial Cultural Satellite Account, 2015, Statistics Canada
4. GDP – Toronto

The City of Toronto estimates that, in 2011, the cultural economy contributed approximately $11.3 Billion to the city’s GDP.

5. Culture Jobs

Canada Wide

- From the CSA, viewed from the product perspective, culture jobs accounted for 647,300 jobs in 2010, contributing 3.7% to total employment.
- From the CSA, viewed from the industry perspective, culture industries accounted for 703,900 jobs, representing a 4.0% share of jobs in the total economy.

Provinces

- From the provincial/territorial CSA, in 2010, Ontario had approximately 280,000 jobs directly related to cultural products, followed by Quebec (153,000), British Columbia (56,000) and Manitoba (22,200).

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**Figure 6: Culture Jobs, and Jobs in Culture Industries, by Province/Territory (2010)**

<table>
<thead>
<tr>
<th>Provinces and Territories</th>
<th>Product Perspective</th>
<th>Industry Perspective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alberta</td>
<td>55,923</td>
<td>62,309</td>
</tr>
<tr>
<td>British Columbia</td>
<td>87,996</td>
<td>94,839</td>
</tr>
<tr>
<td>Manitoba</td>
<td>21,863</td>
<td>21,970</td>
</tr>
<tr>
<td>New Brunswick</td>
<td>9,381</td>
<td>9,546</td>
</tr>
<tr>
<td>Newfoundland</td>
<td>5,155</td>
<td>5,783</td>
</tr>
<tr>
<td>Northwest Territories</td>
<td>691</td>
<td>744</td>
</tr>
<tr>
<td>Nova Scotia</td>
<td>14,305</td>
<td>17,195</td>
</tr>
<tr>
<td>Nunavut</td>
<td>473</td>
<td>526</td>
</tr>
<tr>
<td>Ontario</td>
<td>278,801</td>
<td>301,090</td>
</tr>
<tr>
<td>Prince Edward Island</td>
<td>1,947</td>
<td>2,355</td>
</tr>
<tr>
<td>Quebec</td>
<td>153,155</td>
<td>174,790</td>
</tr>
<tr>
<td>Saskatchewan</td>
<td>12,048</td>
<td>15,102</td>
</tr>
<tr>
<td>Yukon</td>
<td>743</td>
<td>764</td>
</tr>
</tbody>
</table>

*Source: Provincial and Territorial Cultural Satellite Account, 2015, Statistics Canada*
6. Employment Growth in Creative / Cultural Occupations

Note: due to changes to the 2011 census, occupation data from the 2011 census is not directly comparable to 2006, and census-based measures of employment growth for that period are not readily available. For this reason, the following statistics related to employment growth in cultural occupations – while dated – have been retained for this version of the Compendium.

Canada-wide

- Statistics Canada Census data suggest that between 2001 and 2006, employment in cultural occupations increased 12 per cent, compared with 9 per cent growth for the overall employed Canadian labour force.
- The Conference Board of Canada estimates that between 2006 and 2009, overall employment in cultural occupations increased 5.1 percent. In 2009 however, employment decreased in all of the cultural occupational groups, excluding heritage collection and preservation. In 2009, overall employment in the cultural sector declined, largely due to the global recession.
- Between 2001 and 2006, some of the occupations that experienced the largest growth were supervisors of library, correspondence, and related information clerks (49%), architectural technologists and technicians (35.9%), professional occupations in public relations and communications (35.6%), editors (32%), and interior designers (22.9%).
- The occupations that experienced the largest decline over that same period (2001 - 2006) were patternmakers, textile, leather, and fur products (-51.4%), landscape architects (-32.3%), and managers in publishing, motion pictures, broadcasting and performing arts (-17.4%).

Figure 7: Employment Growth in Cultural Occupations, 2001 - 2006

Source: CHRC’s Cultural HR Study 2010: Labour Market Information Report for Canada’s Culture Sector, 2010
In Toronto

- **Creative Occupations**
  - From 1991 to 2007, creative occupations grew at more than twice the rate of the total Toronto CMA labour force (compound annual growth rate of 5.4 percent, compared to 2.2% for the CMA).

- **Creative Industries**
  - Between 1991 and 2009, creative industries grew at the same rate as tourism (2.9%), faster than financial services (2.4%), the medical and biotechnology industries (1.7%), and the food and beverage industry (1.4%). Creative industries were also close in terms of growth to leading sectors such as business services (3.4%) and information and communication technology (3.2%).

- **Cultural Labour Force**
  - According to the 2006 census, the Toronto-region had 129,165 residents in the cultural labour force, and Toronto proper had 82,940 (6% of Toronto’s overall workforce). This is a significantly higher proportion than Ontario or Canada as a whole.
  - Between 1987 and 2007, the cultural workforce grew at an annual rate of 1.3 percent, compared to 1.6 for Toronto’s overall labour force. This sluggishness has been attributed to a decline in the “cultural support” category.

*The Cultural Labour Force is a wider set of occupations than “creative occupations”, including all individual creators as well as cultural support workers.

**Figure 8: Employment Growth in Cultural Labour Force vs Total Labour Force, Toronto CMA, 1987 - 2007**

![Graph showing employment growth in cultural labour force vs total labour force, Toronto CMA, 1987-2007](source: From the Ground Up: Growing Toronto’s Cultural Sector, City of Toronto, 2011)
7. Growth of the Sector

Using 3-year moving averages of Labour Force Survey data, Hill Strategies have developed a more current estimate of the growth/change in the number of artists and cultural workers regionally, and across Canada, looking at the period from 1989 up to 2013.

- For all of Canada, from 1989 to 2013, the rate of growth in the number of artists (56%) and cultural workers (47%) both exceeded the rate of growth of the overall labour force (38%).
- On a regional basis, from 1989 to 2013, the number of artists grew faster than the overall labour force in British Columbia, Ontario, Quebec and the Atlantic Provinces. In the central provinces – Alberta, Saskatchewan, and Manitoba – the overall labour force grew faster than the number of artists.
- The rate of growth of artists was highest in British Columbia (74%) and Quebec (73%).
- The rate of growth of cultural workers was highest in British Columbia (79%), Alberta (62%), and Quebec (59%).

**Figure 9: Percentage Change in Artists, Cultural Workers, and the overall Labour Force, 1989 - 2013**

(Labour Force Survey 3-year moving average)

Source: Analysis by Hill Strategies based on Labour Force Survey 3-year moving averages.
8. Cultural Tourism – Ontario

Tourism is a major economic driver, contributing $31.1 billion to Canada’s GDP in 2011\(^9\), and $24.7 billion to Ontario’s GDP in 2012\(^10\). The creative and cultural sector plays an important role in creating the kinds of dynamic, engaging places that people want to visit, and fuels tourism both with respect to traditional cultural attractions and the increasingly significant lifestyle/experience tourism market.

Ontario Arts & Culture Tourists\(^{11}\)
- In 2010, 9.5 million tourists participated in arts and cultural activities (arts and culture tourists), representing over one fifth of the 42.8 million overnight trips to the province (including business, family trips, etc.).
- Over a two-year period, 89.5% of North American overnight pleasure tourists with Ontario travel experiences participated in an arts & cultural activity (2006).
- The following table further details the uptake of various arts and cultural activities by North American overnight pleasure tourists with Ontario travel experience.

**Figure 10 Percentage of North American Overnight Pleasure Tourists to Ontario Attracted to Selected Arts & Cultural Activities**

<table>
<thead>
<tr>
<th>Arts and Culture Tourist Activity as One-of-Many</th>
<th>% of North American Tourists with Ontario Travel Experiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Arts and Culture Tourist Activity as One-of-Many</td>
<td>89%</td>
</tr>
<tr>
<td>Other Arts (e.g., shop for local arts/crafts, exhibitions/fairs)</td>
<td>64%</td>
</tr>
<tr>
<td>Historic Sites, Buildings, Architecture</td>
<td>61%</td>
</tr>
<tr>
<td>Museums</td>
<td>43%</td>
</tr>
<tr>
<td>Other Cultural Attractions (e.g., zoos, aquariums, gardens)</td>
<td>43%</td>
</tr>
<tr>
<td>Cultural Festivals</td>
<td>36%</td>
</tr>
<tr>
<td>Music Performances (classical, jazz, opera, popular, country)</td>
<td>31%</td>
</tr>
<tr>
<td>Other Performing Arts (e.g., free outdoor performances, circus)</td>
<td>31%</td>
</tr>
<tr>
<td>Theatre/Dinner Theatre</td>
<td>28%</td>
</tr>
<tr>
<td>Art Galleries</td>
<td>24%</td>
</tr>
<tr>
<td>Arts Festivals (e.g., film, literary, music)</td>
<td>18%</td>
</tr>
<tr>
<td>Ballet/Dance</td>
<td>8%</td>
</tr>
</tbody>
</table>

*Source: Ontario Arts and Culture Tourism Profile, Ontario Arts Council, 2012*
Ontario Arts & Culture Tourists – Spending and Economic Impact

- In 2010, spending by arts and culture tourists in Ontario reach $4.1 billion – 36% of spending by all overnight tourists.
- Arts and culture tourists outspent typical overnight tourists in Ontario at a rate of almost two-to-one, spending $667 per trip in Ontario, on average, compared to $374 spent by the typical overnight tourist (2010).
- Ontario’s arts and culture tourists contributed $3.7 billion toward provincial GDP, generating approximately 67,700 jobs and $2.4 billion in wages as a result of their spending (2010).
- Approximately $1.7 billion in taxes, across all levels of government, were generated by the spending of arts and culture tourist in Ontario (2010).

Based on the Ontario Ministry of Tourism, Culture and Sports’s Regional Tourism Profile for Ontario, looking at itemized spending by visitors, in 2012, visitors to Ontario spent $1,097,052,000 (approximately $1.1 billion) on culture. Broken out by visitor origin:

- Visitors from Ontario: $643,876,000
- Visitors from elsewhere in Canada: $78,304,000
- Visitors from the US: $250,786,000
- Visitors from overseas: $124,085,000

9. Economic Impact of Toronto’s Festivals and Major Events

- **Toronto International Film Festival (TIFF):**
  - In 2012/2013, the Toronto International Film Festival and year-round programming at TIFF Bell Lightbox generated $189 million in annual local economic impact.
  - TIFF events and related activities created or maintained 2,295 jobs and generated $58.2 million in total tax revenue for governments.
  - Since the organization’s previous economic impact study in 2008/2009, TIFF’s economic impact has increased by $50 million.
  - In 2013, TIFF reported more than 432,000 in attendance at the Toronto International Film Festival, and 1.8 million in attendance at all TIFF activities.

- **Nuit Blanche:**
  - Over one million people attended the 2013 Nuit Blanche, including an estimated 200,000 out-of-town visitors.
  - Based on the findings of an Ipsos Reid survey, the 2014 event generated an economic impact of $40.5 million.

- **Luminato:**
  - Luminato Festival reached more than 700,000 attendees in 2014.
  - Over the first three festival years (2007-2009), Luminato attracted upwards of 500,000 visitors to Toronto from outside the GTA, and generated an economic impact of over $450 million in visitor expenditures for regional businesses.

- **Toronto Caribbean Carnival (formerly Caribana):**
  - Over one million in attendance at the Grande Parade.
  - The festival reports a reach of over 470,000 female visitors and 470,000 male visitors.
  - 58% of participants resided outside of Toronto; 19% travelled to the festival from outside of Canada.
- Total economic impact of the 2009 Carnival was estimated at $438 million, generating more than $198 million of tax receipts for all levels of government.

- **Pride Toronto**
  - 1.2 million visitors participated in the final weekend of the 2013 festival.
  - A Pride Toronto economic impact study of the 2013 festival estimated $286 million in direct festival-related spending.

- **NXNE**
  - The festival draws an estimated 350,000 attendees annually.
  - NXNE generates an annual economic impact of over $50 million for Toronto.

- **Hot Docs**
  - Hot Docs 2013 had a total estimated audience of 180,000.
  - Expenditures by attendees and industry delegates, as well as Hot Docs’ operating budget, generated an impact of $33.3 million on Ontario’s GDP, as well as 469 jobs and $14.4 million in tax revenue.
Endnotes
