LABOUR MARKET INFORMATION STUDY OF THE

# CULTURAL LABOUR FORCE 2019

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# Executive Summary

A dynamic cultural sector is central to the success of Canada's creative, knowledge-based economy. To stay abreast of the impacts on the labour market of rapidly evolving changes in the demand for and delivery of cultural products, the Cultural Human Resources Council commissioned The Conference Board of Canada to conduct this labour market information study, which updates a 2010 study. Accurate and up-to-date labour market information about the cultural sector is the best tool to enable individuals and organizations to respond to these changes.

Through consultations with a variety of cultural sector professionals, a conceptual definition of cultural work and output was developed for this study:

> *Cultural activity involves the creation, research, development, production, manufacturing, distribution, presentation, performance, and/or preservation of creative goods and services, including the discovery and preservation of heritage—all with a professional intent.*

This definition recognizes the distinct activities associated with the "creative chain" and the nature of heritage while also distinguishing between labour market and hobby or pastime activities.

Nearly 800,000 Canadians were employed in cultural occupations in 2015, according to the most recent census—that is, 4 per cent of all employment in Canada. Between 2010 and 2015, employment in cultural occupations increased 3.2 per cent—slightly slower than the 4.3 per cent growth in employment across the entire Canadian economy.

There were more than 117,000 cultural establishments in Canada in 2016. This represented 3 per cent of all establishments in the Canadian economy. Still other cultural workers operate independently and may not meet the reporting criteria to be identified as establishments in Statistics Canada's Business Register.

The footprint of the cultural sector on the overall economy is significant and growing. Between 2013 and 2017, real value-added output of Canada's cultural sector grew at an average annual rate of close to 1 per cent. By 2017, it generated $58.8 billion in direct gross domestic product (GDP)—2.7 per cent of the total GDP of Canada.

The topic of labour shortages in the cultural sector is rarely discussed, in large part because a very high percentage of the occupations are filled by self-employed individuals. But this report shows that labour shortages do exist and, in some cases, are projected to worsen**.** Conservatively, labour shortages are estimated to have reduced the cultural sector's potential output by over $1.2 million in 2018 alone (in 2012 dollars). Labour shortages are projected to cost the cultural sector over $1.5 million annually in lost output (2012 dollars) by 2026.

According to the census, cultural workers tend to be younger on average then the overall Canadian labour force and have a higher level of educational attainment. In fact, 43 per cent hold a bachelor's degree or higher, versus 25 per cent in the overall labour force.

Despite the higher levels of education, employment income among cultural occupations tends to be lower than for the Canadian labour force overall. Another difference with the rest of the Canadian labour force is the high prevalence of self-employment, at 28 per cent—more than double the national average of 12 per cent. For creative and artistic production occupations in the cultural sector, the rate of self-employment jumps to nearly 41 per cent.

While various approaches and measures can be used to convey the tangible economic footprint of the cultural sector, there are currently no reliable methods to quantify the subjective experiential value or benefit the sector provides to individuals and society at large. In fact, even when reporting on the sector's tangible economic footprint, the concept of culture must be measured within available statistical systems.

Therefore, in addition to the census data collected for this report, insights were also generated by conducting focus groups, interviews, and a pan-Canadian online survey comprising individual workers in the sector and businesses. Gathering primary data from the focus groups, interviews, and online survey was an important component in gathering qualitative insights into understanding the working environment of cultural occupations.

Two major themes (broadly categorized) in the focus groups revolved around **scarcity of resources** and an **abundance of available production**.

The scarcity of resources theme includes monetary challenges, such as low wages, precarity of work, and difficulty securing funding or generating stable revenue streams. Another aspect of scarcity of resources is the difficulty in finding qualified workers who often need to operate in multiple simultaneous roles for only modest pay. Recruiting for rural locations and for mid-level positions appears to represent an even more daunting challenge for employers. The scarcity of resources theme includes the high reliance on goodwill and volunteering. Aside from relying on the general public for unpaid help, the cultural sector also relies on its own staff and workers to provide unpaid work related to various aspects of keeping a business operational.

The concept of an abundance of available production is in many respects a by-product of the low barriers to entry of working in the sector, particularly among the creative and artistic occupations. While these low barriers can be beneficial for encouraging new entrants to the sector, they perpetuate and (with the aid of technological advancement) increase the prevalence of "gig"-related work. Many focus group participants characterized employment in cultural occupations as being largely short term, part-time, or erratic, with less stable income, few benefits, and no long-term financial security. Participants also reported frequently working in other industries (whether by desire or out of the need to complement or stabilize their income).

Meanwhile, the need to multi-task, cited by close to one-half (49 per cent) of respondents, and the need to develop business and technological skills are widely recognized sector-wide. This is particularly evident among domains with higher rates of self-employment or creative production, such as visual and applied arts and written and published works. Here, self-employed individuals frequently have to undertake duties beyond their artistic production, including the many diverse tasks needed to run a business (marketing, securing funding, etc.).

Another theme expressed during the focus groups was related to the **inadequacy of the nomenclature and the associated gaps in data captured**. The widespread opinion expressed during the focus groups was that the nomenclature used by official sources is outdated. The language more commonly used today relates to skills rather than occupations or static job titles. As a result of the inadequate (or imprecise) nomenclature used, the associated data reported from official statistics is often viewed skeptically. Some of these issues have been addressed in the form of recommendations in Chapter 10.

Broader issues not specific to the cultural sector (e.g., discrimination, ageism, ableism, racism, sexism, tokenism) arose frequently through the various consultations. A specific recommendation in the report is to provide training to staff and boards of directors that integrates best practices on human resources issues (e.g., harassment and inclusion).

Other recommendations aimed at strengthening the cultural infrastructure include creating mentorships for emerging leaders, skills development programs focusing on management, technological, and business skills.

In addition to the recommendations to strengthen the cultural infrastructure, recommendations are also made to address the significant data gaps that inhibit an accurate assessment of the cultural sector. This includes developing a pilot project to assess new and better practices in data collection specifically aimed at capturing the "gig economy" reality. Another recommendation is to develop a human resources module within Statistic Canada's Culture Satellite Account, much like what has been done for the tourism sector.

While, in one sense, the cultural sector looks to be thriving, it appears this way thanks to the collective and unerring efforts of a passionate and dedicated workforce that wishes to always do more even when there is less to do it with. In another sense, this workforce hides some of the difficulties tied to the production so prized by all.

Projections in this report suggest the sector has the potential to keep expanding in the years ahead, growing its economic footprint and employing more Canadians. Specifically, the sector's contribution to Canada's real GDP is forecast to increase by over 15 per cent between 2017 and 2026. This will support further growth in employment of just under 8 per cent.

Labour challenges associated with an inability to recruit and retain positions in the cultural sector will become more prevalent in the years ahead. Addressing the recommendations in this report to strengthen the cultural workforce and meet the challenges posed by various skill gaps will go a long way to ensuring the cultural sector continues to be a net contributor to the Canadian economy and reaches—or even exceeds—the growth projections identified here, all while maximizing cultural sector employment.

# 1. Introduction

Many studies have demonstrated that a vibrant arts and cultural sector generates a wide range of socioeconomic benefits to individuals and to society. Indeed, it has been shown that arts and culture play a vital role in improving economic performance, in attracting talent, business, and investment, and in providing positive social impacts on quality of life, health and well-being, community development, and social cohesion.[1]

A growing, dynamic cultural sector is central to Canada’s success as a creative, knowledge-based economy. The cultural sector also serves as a magnet for skilled and creative people as Canada becomes increasingly dependent on international migration to sustain the size of its national labour force.

In recent years, the labour market for the cultural sector has grown increasingly complex, changing rapidly and demanding new skills. The ability of individuals to respond to these changes requires accurate and up-to-date labour market information about the sector.

The Conference Board of Canada is pleased to present this report providing labour market information about Canada’s cultural sector. Broadly defined, labour market information is information about the conditions in or operations of a specific labour market. This report presents an analysis of the cultural labour force in Canada, including a profile of the cultural sector of the economy and its component cultural subsectors, or “domains,” as well as employment trends and demographic profiles of cultural sector workers. The analysis builds on previous studies of the cultural sector, but also identifies current data gaps and outlines general recommendations for how to address those gaps.

Insights into the operation and performance of Canada’s cultural labour market are important for a number of reasons:

- For individuals making career choices, labour market information can provide occupational options and information about the current labour market environment and current trends.
- For job seekers, labour market information can offer information about job opportunities, needed skills, working conditions, and prevailing wage rates.
- For employers, labour market information can help guide compensation strategies, recruitment efforts, training practices, and collective bargaining.
- For educators, labour market information can be useful when forecasting student demand, developing curricula, and planning course offerings.

[1] Department of Heritage Canada, *Social Impacts and Benefits of Arts and Culture*.

While labour market information usually takes the form of statistical data, qualitative information can also help to shed light on labour market trends and outcomes. This report includes the findings of a series of industry consultations with cultural sector stakeholders who were asked about the issues affecting their participation in the cultural labour force.

The labour market information for Canada's cultural sector in this report has been organized as follows:

- **Chapter 2, Defining the Scope of the Cultural Sector**, provides the fundamental guidelines used to define the scope of Canada's cultural sector, including the domains that make up the sector. Defining the scope of the sector is a crucial part of defining culture in industrial (or economic sector) terms, in employment (or occupational) terms, and in terms of cultural goods and services. Readers are directed to the appendices of this report for further details about specific inclusions in the definition of the cultural sector.

- **Chapter 3, Cultural Occupations**, provides employment profiles of cultural occupations and identifies some of the opportunities and challenges that specific cultural occupations will face over the near term.

- **Chapter 4 Cultural Sector Employers**, provides employer profiles of cultural sector establishments, including the number, size, and geographic distribution of establishments that employ cultural sector workers.

- **Chapter 5, Financial Performance of Cultural Domains**, provides the most recent financial performance of the six core cultural domains that make up the bulk of the cultural sector. It also identifies some of the opportunities and challenges that cultural domains will face over the near term. This financial perspective is useful for cultural establishments (including employers and self-employed individuals) and also for those who work, or plan to work, in the sector.

- **Chapter 6, Economic Overview of the Cultural Sector**, presents various indicators that demonstrate recent economic performance of the cultural sector: the sector's real value-added output (that is, gross domestic product, or GDP), Canadian household spending on cultural goods and services, Canadian exports of cultural goods and services, and government support of the cultural sector.

- **Chapter 7, Cultural Sector Consultations**, provides high-level feedback from sector stakeholders via focus groups, online surveys, and personal interviews. The feedback helped guide the assessment of current labour challenges and refine the projections going forward.

- **Chapter 8, Forecast of Labour Supply and Demand for Cultural Occupations**, presents a forecast of the economic performance of the cultural sector along with the associated labour demand and supply relationships influencing the sector's output.

- **Chapter 9, Data Challenges and Limitations**, identifies some of the data challenges and gaps that emerged while developing this labour market information report. The information is presented in a manner that could act as a guide in addressing some of these data challenges and gaps, to help strengthen future labour market information studies of Canada’s cultural sector.

- **Chapter 10, Recommendations**, identifies some tangible recommendations for action by various stakeholder groups to alleviate the challenges associated with labour and data gaps.

# 2. Defining the Scope of the Cultural Sector

Cultural activity contributes greatly to Canada's economic prosperity. To understand the cultural sector and its associated economic activities, it is necessary to begin by defining the scope of the cultural sector.

The Conference Board used a consistent a framework to define and measure the cultural sector, and this framework provided the foundation for this labour market information report. The development of the framework was guided by four main considerations:

- First, the concept of culture needed to be clarified. Culture can mean different things to different people, so we identified which activities were to be included in our definition of the cultural sector and which were to be excluded. For example, although many people would argue that sports play in integral role in Canada's "cultural fabric," sports are excluded from our definition of culture.
- Second, being creative by nature was not enough to warrant the inclusion of an activity in our scope of the cultural sector. In fact, many creative activities do not generate a cultural product. For example, industrial designers in an automobile company engage in creative activity as part of the production chain of an output that is not a cultural product.
- Third, the framework defining culture needed to be cognizant of the many changes transforming the sector. These include such influences as globalization; the application of technology in the creation, production, and dissemination of cultural goods and services; and changes in consumption patterns.
- Fourth, the concept of culture needed to be practical in the sense that cultural activity could be measured using available statistical systems, even though these systems may not be particularly well-suited to isolating and quantifying cultural activity.

In the end, the measurement of the cultural sector in this report was assembled using common principles whereby governments, business, and other financially affiliated entities could assess the sector alongside other industries and sectors of the economy.

## *2.1 Definition of Cultural Goods and Services*

In developing a framework for culture, it is necessary to move beyond an abstract concept of culture to form a coherent and usable definition of cultural goods and services. Statistics Canada, in its framework for cultural statistics, takes a relatively broad view of culture, defining it as "creative and artistic activity and the goods and services produced by it, and the preservation of heritage." [2]

Our definition of professional cultural activity, developed for this report after consultations with a variety of stakeholders in the cultural sector, is as follows:

[2] Statistics Canada, "Conceptual Framework for Culture Statistics 2011."

*Cultural activity involves the creation, research, development, production, manufacturing, distribution, presentation, performance, and/or preservation of creative goods and services, including the discovery and preservation of heritage—all with a professional intent.*

Why this definition?

- This conceptual definition recognizes the distinct activities of the "creative chain" and the distinctive nature of heritage.
- The use of the term "professional" is important for distinguishing labour market activities from hobby or pastime activities.
- "Professional intent" includes commercial, not-for-profit, and for-profit activities conducted while producing a cultural good or service.
- "Heritage" includes libraries, archives, museums, and other human and built heritage.

To be consistent with our objective of properly defining culture, we had to ensure that activities included in the framework are creative activities, while excluding other related activities, such as sport. To this end, a cultural activity is an activity whose ultimate purpose is the delivery of a creative, artistic good or service.

We follow Statistics Canada's current thinking on what constitutes a cultural good or service. For our purposes, a cultural good or service is one that can be copyrighted or advances a copyrightable or heritage good or service to the end user of that good or service. Formally, a cultural good or service must be the result of a creative, artistic activity and satisfy at least one of the following four criteria:[3]

- It must have the potential of being protected by copyright legislation, or in other words, be copyrightable. Examples include a magazine article, script, manuscript, drawing, choreography, book, newspaper column, sculpture, radio program, film, etc.
- It enables the creation, production, dissemination, or preservation of culture products, e.g., recording, manufacturing, printing, broadcasting, podcasting, etc.
- It adds to, or alters, the content of a culture product (content services), e.g., editorial services, translation, illustration, layout and design, music, etc.
- It preserves, exhibits, or interprets human or natural heritage, e.g., historic sites and buildings, archives, museums, art galleries, libraries, botanical gardens, zoos, etc.

[3] Statistics Canada, "Conceptual Framework for Culture Statistics 2011."

## 2.2 The Creative Chain

In thinking about culture, we have found it useful to follow the concept of the "creative chain"[4] to define the process of producing a cultural product from its creation to its end use. Within this creative chain, we can identify three main stages involved in moving cultural products from their point of creation through to the point of consumption.

First, the **creation** stage involves the origination and authoring of ideas and/or content, as well as the discovery and collection of heritage content. Establishments in this part of the creative chain are involved in the development of a creative artistic idea. For example, an independent writer developing a manuscript for a book is included in this part of the chain.

The second stage is **production**. It involves all aspects related to taking the creative artistic idea and transforming it into the final finished product. For example, the author's manuscript is transformed into a final manuscript ready for printing through the use of editorial and other services. If applicable, the production stage also incorporates all aspects related to the **manufacturing** of cultural products. This can involve taking the readily identifiable manifestation of a creative artistic idea and mass-producing it. In addition to the production and manufacturing of new cultural products, this stage also includes activities associated with the **preservation and conservation** of libraries, archives, and cultural and natural heritage. The production stage, in this context, encompasses the conservation, preservation, and management of tangible and intangible products of significant cultural, heritage or natural meaning.[5]

The final stage of the creative chain is **dissemination**. It incorporates all aspects related to the **distribution** of cultural products to the end users. The **presentation and exhibition** of information related to heritage, collections, and sites and the **performance** of various forms of performing arts are also represented within this stage.

With only three stages distinguished in the creative chain, it is likely that most cultural products will pass through all three stages. However, there are particular processes, particularly associated with heritage and/or preservation, where the stage of creation may not be part of the creative chain.

[4] Statistics Canada, "Conceptual Framework for Culture Statistics 2011."
[5] Ibid.

## 2.3 Measuring Output and Employment

One of the challenges in measuring the cultural sector is the dichotomy that exists between the production of cultural goods and services and the employment of individuals who would be classified as working in a cultural occupation. Establishments involved in the production of a cultural good or service may employ individuals who work not only in cultural occupations but also in other (non-cultural) occupations. Similarly, individuals who could be identified as working in a cultural occupation may or may not work in cultural establishments. For example, an editor may be employed by a book publisher, which is an establishment that produces a cultural product, or by an automobile manufacturer editing owners' manuals in an establishment that does not produce a cultural product.

For this reason, we have restricted our presentation of the financial performance of the cultural sector (and component domains) to include only those cultural establishments specifically identified within the creative chain. Likewise, the reported employment figures are based on specific cultural occupations.

A cultural occupation is one in which most of the work done within a specific National Occupational Classification (NOC) code is directly tied to creating or adding value to a cultural good or service. Similarly, cultural establishments are those in which most of the outputs produced are cultural goods or services.

In this report, cultural sector occupations are organized into four main categories: creative and artistic production, technical and operational, heritage collection and preservation, and cultural management.

### 2.3.1 Cultural Domains

In measuring the performance of the cultural sector, we found it most useful to think about establishments that are involved along the creative chain. In other words, we measure the performance of those establishments involved in the creation, production, and dissemination of cultural goods and services. The financial performance and health of these establishments is an important factor influencing the future demand for cultural workers and the future supply of cultural products.

This report organizes cultural establishments into the following six domains, each consisting of related activities, products, and occupations:

- **Heritage and libraries**—includes the establishments and individuals involved in museums, libraries, archives, and built heritage.
- **Live performance**—includes the establishments and independent artists involved in live entertainment shows in a variety of disciplines.
- **Visual and applied arts**—includes the establishments and independent artists involved in the practice of visual arts, fine crafts, or media arts.
- **Written and published works**—includes the establishments, writers, and independent artists involved in the creative chain for the production of books, newspapers, magazines, and other periodicals.

- **Audio-visual and interactive media**—includes the establishments and individuals involved in the creative chains for film, radio, television, and broadcasting, as well as the delivery of an interactive informing, educating, or entertaining experience.
- **Sound recording**—includes the establishments and independent artists in the creative chain for sound recording.

In this period of enormous industrial and technological change, the line between the content production and dissemination becomes increasingly blurry. For instance, internet streaming service providers, such as Netflix and Amazon Prime Video, are moving toward vertical integration and functioning as both content creators and broadcasters. As a result, care is needed to ensure different components of cultural activity in those corporations are reported separately.

Because the six domains listed above mainly engage in producing goods and services stemming from creative and artistic activity, we consider them to be the “core” cultural domains. In parallel, the cultural domains also include four “ancillary” cultural activities associated with advertising, architecture, design, and collected information (publication of catalogues, directories, and related material). Ancillary cultural activities are those that produce goods and services through a creative and artistic process but primarily focus on practicality rather than the transmission of a cultural concept. The final products—such as a building or an advertisement—as a result do not meet the criteria for culture as defined earlier in this chapter. In addition, there are two transversal domains—domains that support and enable creative artistic activities under the culture umbrella. While transversal domains are not fundamentally cultural, they are an integral part of culture, as cultural activities could not exist without their facilitation. The transversal domains are the education and training domain and the governance, funding, and professional support domain.

The analysis in this labour market information report focuses on the six core cultural domains, although some sections of the report also present data on ancillary, multi-, and transversal domains. There are significant differences in human resources issues between core and non-core cultural activities with regards to training, certification, technical industry support, salaries, pension plans, and job security.

More details on these domains and the specific industries that are included in each domain can be found in Appendix A.

### 2.3.2 Cultural Occupations

When measuring employment in the cultural sector, we found it most useful to think about employment in terms of cultural occupations. By moving away from the use of establishments as the basis of measurement, we can capture those individuals involved in cultural occupations who do not work for cultural establishments. At the same time, focusing on cultural occupations allows us to exclude those individuals who work in cultural establishments but not in cultural occupations. The advantage of this approach is that it allows us to focus on occupations that would be most readily influenced by Cultural Human Resource Council initiatives, while excluding occupations whose training needs fall outside CHRC’s mandate. Because the occupations are categorized differently from the domain groups mentioned above, cultural occupations could fall in either the six core domains or four ancillary domains mentioned above.

These cultural occupations used in this report have been grouped into four separate categories:

- **Creative and artistic production:** This is the largest group, encompassing more than half of all cultural occupations. Creative occupations involve the creation, production, and dissemination of cultural goods and services. Many of the occupations traditionally associated with culture, such as painters, actors, dancers, writers, and musicians, fall into this category.
- **Technical and operational:** This group provides technical support for culture goods and services that are technical or operational in nature, such as technicians working in television, film, or broadcasting and drafting technicians, etc.
- **Heritage collection and preservation:** This is the smallest group and consists of only four occupations: librarians, conservators, archivists, and conservation and fishery officers.
- **Cultural management:** This group provides management support for the creation, production, and dissemination of cultural goods and services. The positions are managers in each of the culture domains.

A full list of occupations can be found in Appendix B.

# 3. Cultural Occupations

This chapter presents a high-level quantitative perspective on the composition, size, and growth of the cultural sector using the unit of measurement "employment in cultural occupations," which resonate best with how most stakeholders see the sector. While cultural occupations are undeniably linked in concept to the framework Statistics Canada uses to define the sector, the actual employment values are distinct between the two perspectives. For more personal and granular details about the employment aspects of working in cultural occupations, refer to Chapter 7: Cultural Sector Consultations.

Unlike the majority of employment settings found in Canada—where employees work for a single employer, typically in a full-time, year-round capacity with statutory benefits and entitlements—a prominent characteristic of work in the cultural sector is the high incidence of self-employment. Indeed, data from Statistics Canada's 2016 Census suggests that nearly 28 per cent of the employment in cultural occupations is self-employment—more than twice the national level (12 per cent). Given the higher percentage of part-time, temporary, and contract working arrangements that are common in the cultural sector, many workers face tremendous uncertainty over employment, hours, earnings, and benefits.

Indeed, many of those working in the cultural sector are in non-traditional employment categories, such as "own-account" self-employed (a self-employed person with no paid employees) or self-employed employer (a self-employed person with paid employees). Rather than holding full-time positions, many are part-time, temporary, or contract employees. In addition, given the higher incidence of non-traditional employment in the sector, many are multiple job holders, with two or more concurrent jobs.

This chapter presents a profile of employment in the cultural labour force, using the latest census data from Statistics Canada. This profile focuses on cultural occupations, rather than cultural establishments, in order to capture those individuals employed in the cultural sector who do not work for cultural establishments. The analysis includes those who work in cultural sector establishments as employees and those who are self-employed.

Please see Appendix B for a full list of the occupations.

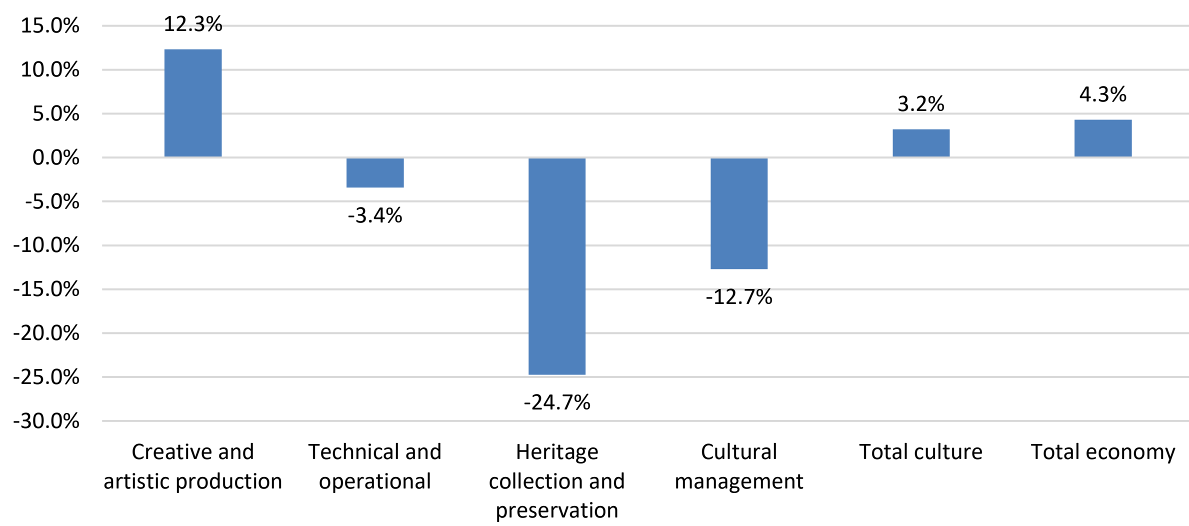
## *3.1 Employment Profile of Cultural Occupations*

### 3.1.1 Employment Overview

**There were 798,305 individuals working in a cultural occupation in Canada in 2015, which represented 4 per cent of the overall Canadian labour force.** The creative and artistic production occupations accounted for more than a half of the cultural labour force (53 per cent). Technical and operational occupations made up another 41 per cent. Heritage collection and preservation combined with cultural management occupations made up the remaining 6 per cent.

Based on Statistics Canada's census data from 2011 and 2016, employment in cultural occupations increased by 3.2 per cent between 2010 and 2015, slightly less than the 4.3 per cent employment growth in the overall economy over the same time span. **The creative and artistic production occupations experienced by far the strongest growth, expanding at almost three times the pace of the overall cultural sector**. On the flip side, employment in the other three occupational groups declined over the five-year period, with heritage collection and preservation occupations experiencing the biggest drop. A full breakdown of growth for all cultural occupations can be found in Appendix B. **The estimates of cultural labour force in this chapter differ from those presented in Statistics Canada's Culture Satellite Account. The focus of the Culture Satellite Account framework is on cultural products or cultural industries, and therefore the data do not align precisely with cultural occupations. In**

**Chart 3.1.1 Employment Growth, 2010–2015**




**addition, the figures in the Culture Satellite Account represent the number of full-year equivalent jobs—whereby seasonal jobs only account for the portion of the year they represent.**

Source: Statistics Canada, 2011 Census and 2016 Census.

**Table 3.1.1: Employment in Cultural Occupations, 2010–2015**

| Cultural occupations | 2010 | 2011e | 2012e | 2013e | 2014e | 2015 |
|---|---|---|---|---|---|---|
| **Creative and artistic production** | 379,815 | 388,752 | 397,898 | 407,260 | 416,842 | 426,650 |
| **Heritage collection and preservation** | 25,925 | 24,492 | 23,138 | 21,860 | 20,651 | 19,510 |
| **Cultural management** | 32,359 | 31,490 | 30,644 | 29,821 | 29,020 | 28,240 |
| **Technical and operational** | 335,372 | 333,047 | 330,737 | 328,444 | 326,167 | 323,905 |
| **Total cultural occupations** | 773,472 | 777,781 | 782,418 | 787,385 | 792,680 | 798,305 |

Source: Statistics Canada, 2011 Census and 2016 Census.
e = estimate

### 3.1.2 Gender Distribution of Cultural Labour Force

**According to Statistics Canada's most recent (2016) census, the overall cultural labour force in Canada is nearly equally split between male and female workers.** While most of the occupational groups tend to be represented by a higher share of female workers, the technical and operational occupation group is represented by a higher share of male workers.

**Table 3.1.2: Gender Distribution of Cultural Occupations, 2015**

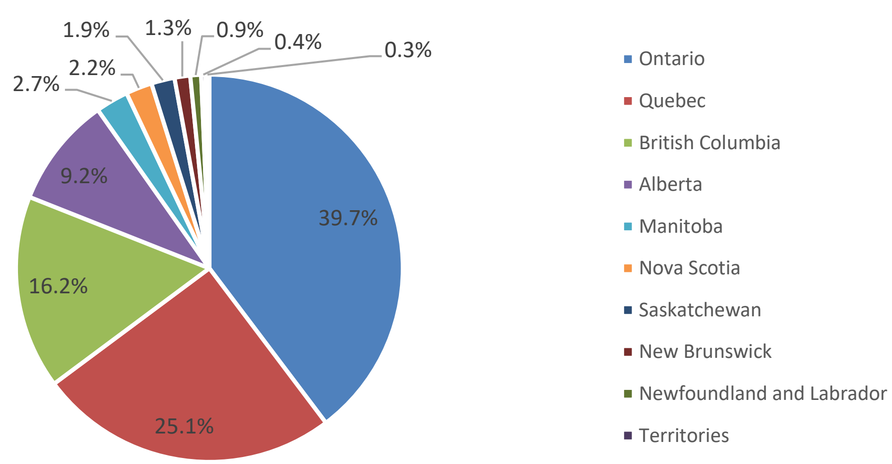
| Cultural occupations | 2015 | Male % | Female % |
|---|---|---|---|
| Creative and artistic production | 426,650 | 48.7% | 51.3% |
| Heritage collection and preservation | 19,510 | 37.0% | 63.0% |
| Cultural management | 28,240 | 48.0% | 52.0% |
| Technical and operational | 323,905 | 51.4% | 48.6% |
| Total cultural occupations | 798,305 | 49.5% | 50.5% |

Source: Statistics Canada, 2016 Census.

### 3.1.3 Regional Distribution of Cultural Labour Force

**The census data show that in 2015, the majority of the employed cultural labour force in Canada was located in Ontario and Quebec**, with the two provinces accounting for 65 per cent of the total cultural labour force in Canada that year. Meanwhile, the Prairies and B.C. accounted for close to 30 per cent of the total employed cultural labour force, while the remaining 5 per cent were in Atlantic Canada (Newfoundland and Labrador, Prince Edward Island, Nova Scotia, and New Brunswick) and the territories.

**Chart 3.1.3 Provincial Distribution of Cultural Labour Force, 2015**




Source: Statistics Canada, 2016 Census.

## *3.2 Demographic Profile of the Cultural Sector Labour Force*

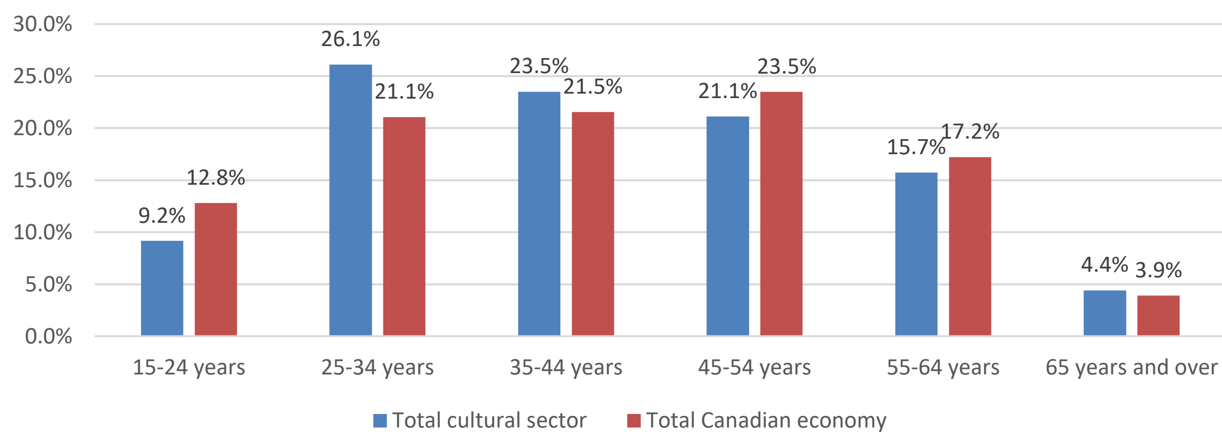
### 3.2.1 Age Profile

**Overall, cultural workers are younger on average than the overall Canadian labour force.** Nearly 59 per cent of cultural workers are 44 years of age or younger, compared with 55 per cent among all workers. Cultural workers are older, however, than they were five years ago, when almost 62 per cent were 44 years old or younger.

**Since the census captures only a worker's primary occupation, it is likely that workers in certain age groups may be underrepresented in the cultural sector**. Indeed, it is not uncommon for younger cultural workers to work elsewhere (for financial reasons) before they can establish themselves in the cultural sector. Consequently, their involvement in the cultural sector will not be captured by the census.

Among the cultural occupational groups, creative and artistic production occupations have the widest range in ages among workers. For example, more than 60 per cent of dancers are 34 years or younger, whereas more than a third of painters, sculptors, and other visual artists are over the age of 55. Meanwhile, in heritage collection and preservation occupations, close to half of the employees are 45 years and older.

**Chart 3.2.1 Age Profile in the Cultural Sector, 2015**



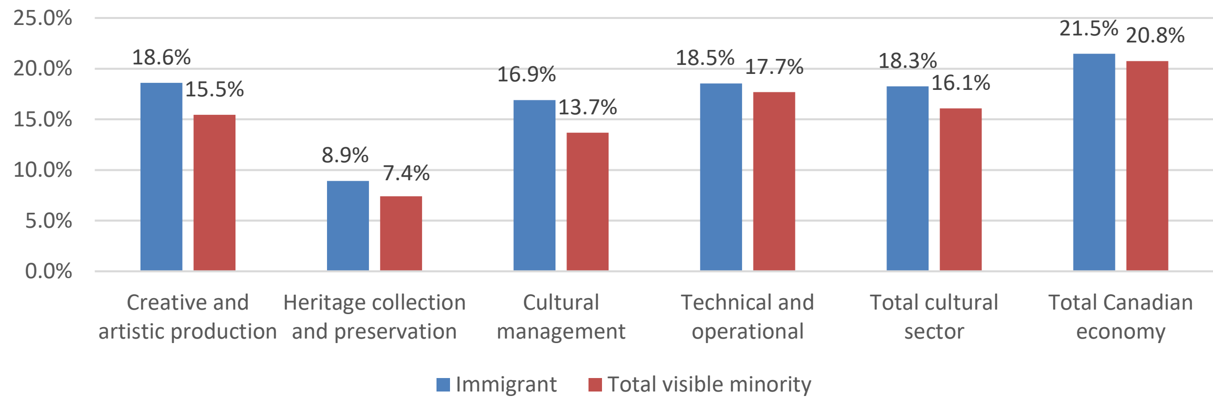

Source: Statistics Canada, 2016 Census.

The age profiles of the rest of the cultural occupational groups (cultural management, technical and operational) were broadly similar to that of the overall Canadian labour force.

### 3.2.2 Immigration and Visible Minority Status

**Immigrant and visible minority workers[6] are somewhat under-represented among cultural workers**. Among the four occupational groups, heritage collection and preservation occupations have the lowest share of immigrant and visible minority workers. (See Chart 3.2.2).

**Chart 3.2.2 Immigration and Visible Minority Status, 2015**
(as a share of total workers)




Source: Statistics Canada, 2016 Census.

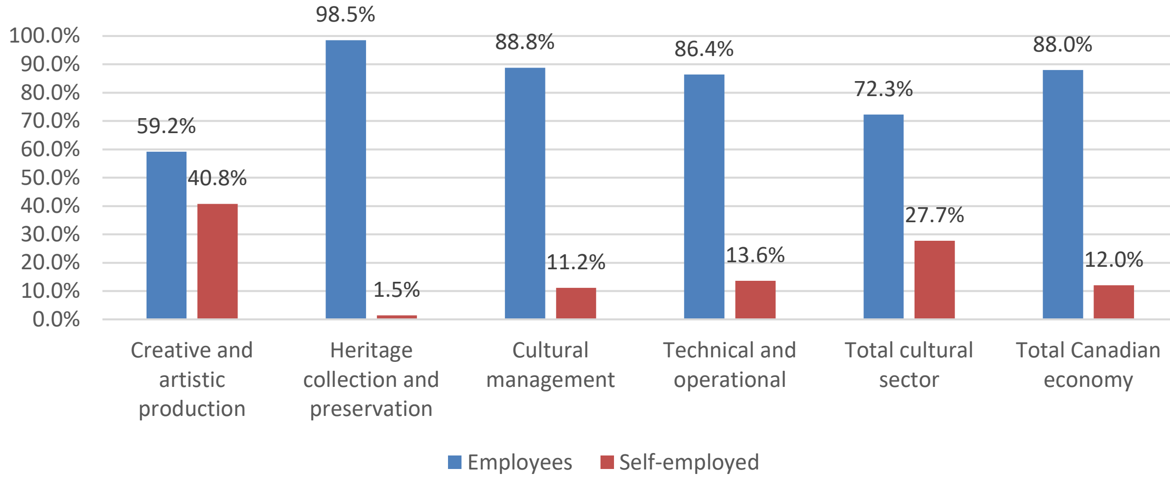
### 3.2.3. Employment Status

**Self-employment is a common characteristic of the working lives of many cultural workers in Canada**. In fact, almost 41 per cent of workers with creative and artistic production occupations are self-employed. Overall, the share of self-employed workers in the cultural sector (28 per cent) is more than double the rate of all Canadian workers (12 per cent).

In contrast, the incidence of self-employment among heritage and preservation workers is significantly lower than in the overall Canadian workforce, at only 1.5 per cent. Meanwhile, the share of self-employed workers in cultural management and in technical and operational occupations is similar to that of the overall employed Canadian labour force (11 and 14 per cent). (See Chart 3.2.3.1a.)

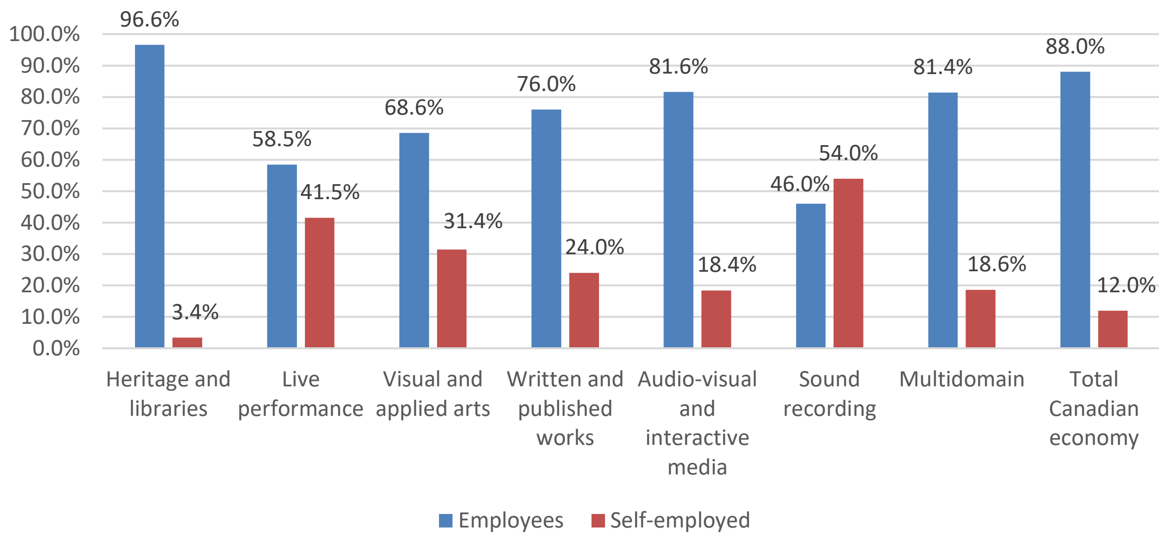
[6] The *Employment Equity Act* defines visible minorities as "persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour."

**Chart 3.2.3.1a Employment Status: Employees vs. Self-Employed by Occupational Group, 2015**




Source: Statistics Canada, 2016 Census.

**Chart 3.2.3.1b Employment Status: Employees vs. Self-Employed by Cultural Domain, 2015**

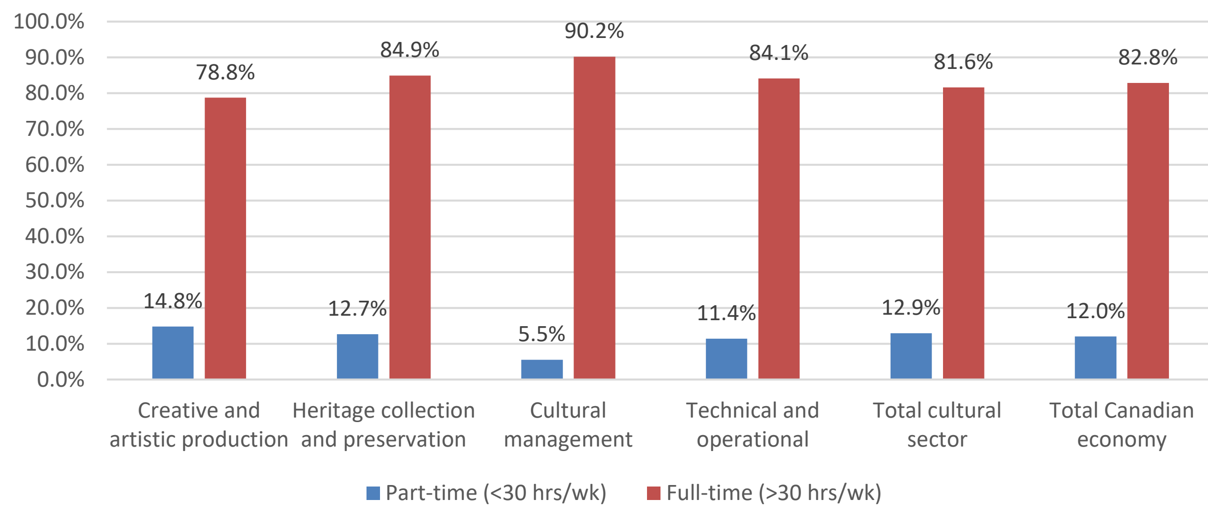



Source: Statistics Canada, 2016 Census.

An interesting pattern emerges when looking at the data from a cultural domain perspective. More than one-half of the workers in sound recording are self-employed (54 per cent). Almost 42 per cent of workers in live performance, a domain that is traditionally characterized by working on a as-needed (by gig) basis, are self-employed.

**The share of part-time versus full-time employment in cultural occupations is similar to that of the overall Canadian labour force.** Among cultural workers, 13 per cent of employment is part-time, namely working less than 30 hours per week. Part-time employment appears to be more common among occupations with higher rates of self-employment, such as those that fall within creative and artistic occupations. **However, it should be noted that the work activity is classified only based on paid hours: it does not include the unpaid hours spent on training, practice, and preparation, arguably an integral part of earning a living in the cultural sector.** As a result, in the case of cultural workers, the share of full-time employment could potentially be underestimated, as these unpaid hours are not considered. Meanwhile, perhaps not surprisingly, most of the employment in cultural management occupations (90 per cent) is full-time.

**Chart 3.2.3.2 Employment Status: Part-Time vs. Full-Time, 2015**



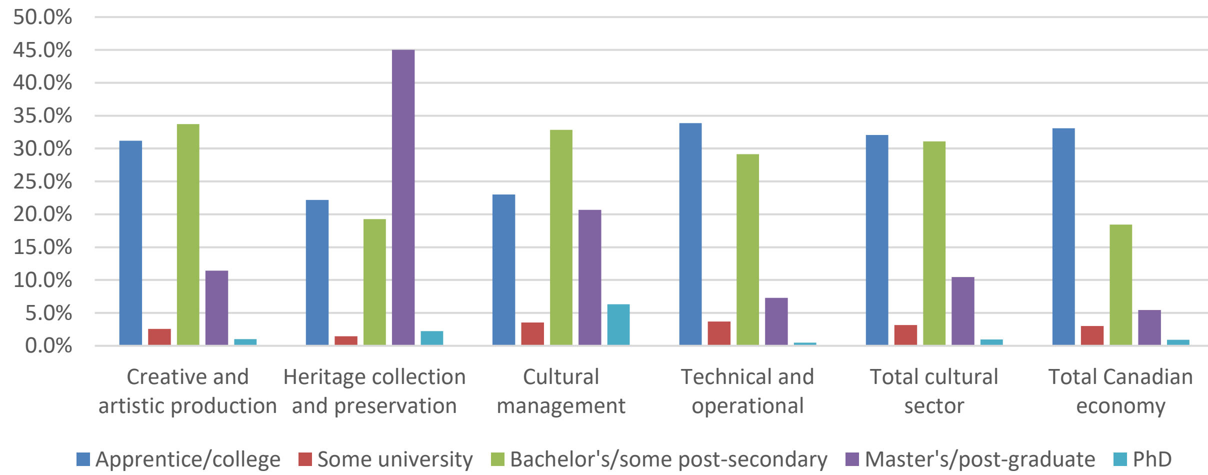

Source: Statistics Canada, 2016 Census.
Note: The share of workers with no hours worked is not included.

### 3.2.4 Education Profile

**Another defining feature of the cultural workers is their high level of educational attainments: 43 per cent of cultural workers hold a bachelor’s degree or higher, compared with 25 per cent in the overall labour force.** On the lower end of the education spectrum, the percentage of cultural workers without a high school diploma is lower than the percentage of workers in the overall Canadian labour force without a high school diploma (4 per cent of cultural workers vs. 12 per cent of all workers).

Among all cultural occupational groups, heritage collection and preservation occupations register the highest level of education, with close to half of the workers holding master’s degrees or higher (47.2 per cent). This is perhaps not surprising, as significant specialized training is usually required for workers to be qualified for jobs in this category. Another 19 per cent hold bachelor’s degrees, meaning that two-thirds of workers in heritage collection and preservation are university-educated. Meanwhile, 37 per cent of workers in technical and operational occupations hold a bachelor’s degree or higher.

**Chart 3.2.4 Education Profile, 2015**
(as a share of total workers in each domain)



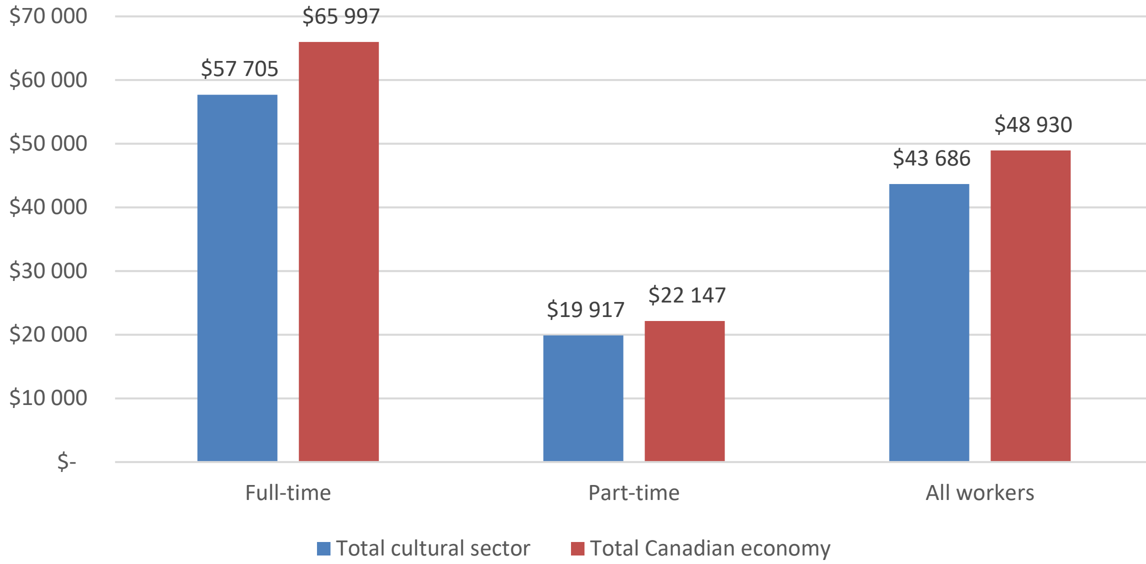

Source: Statistics Canada, 2016 Census.
Note: This share of workers with a high school diploma or less is not included. "PhD" includes all earned doctorates, including, for example, doctorates of musical arts.

### 3.2.5. Wages and Salaries

**Despite the high levels of education among workers in the cultural labour force, employment income recorded among cultural occupations tends to be lower than for the Canadian labour force overall.** This stands true for both full-time and part-time workers. For full-time workers, the average income among cultural occupations was $8,300 lower than it was for the overall labour force in 2015, whereas the difference for part-time workers was $2,230.

Still, the census data do not indicate what portion of a worker's annual income comes from primary or secondary occupations. For this reason, census data may present a skewed interpretation of average employment income, as the cultural sector features a high percentage of multiple-job holders. Moreover, it is also worth stressing that the income data captured by the census may not depict a full picture of income earned by cultural workers. In particular, many self-employed cultural workers get paid only by piece or for hours spent working. **Unpaid hours devoted to preparation and practice—an inseparable part of working in the cultural sector—are not captured by the census. Consequently, cultural workers in many cases earn significantly less per hour than workers in other more conventional occupations if these unpaid hours are included.**

**Chart 3.2.5.1 Average Employment Income Levels, 2015**

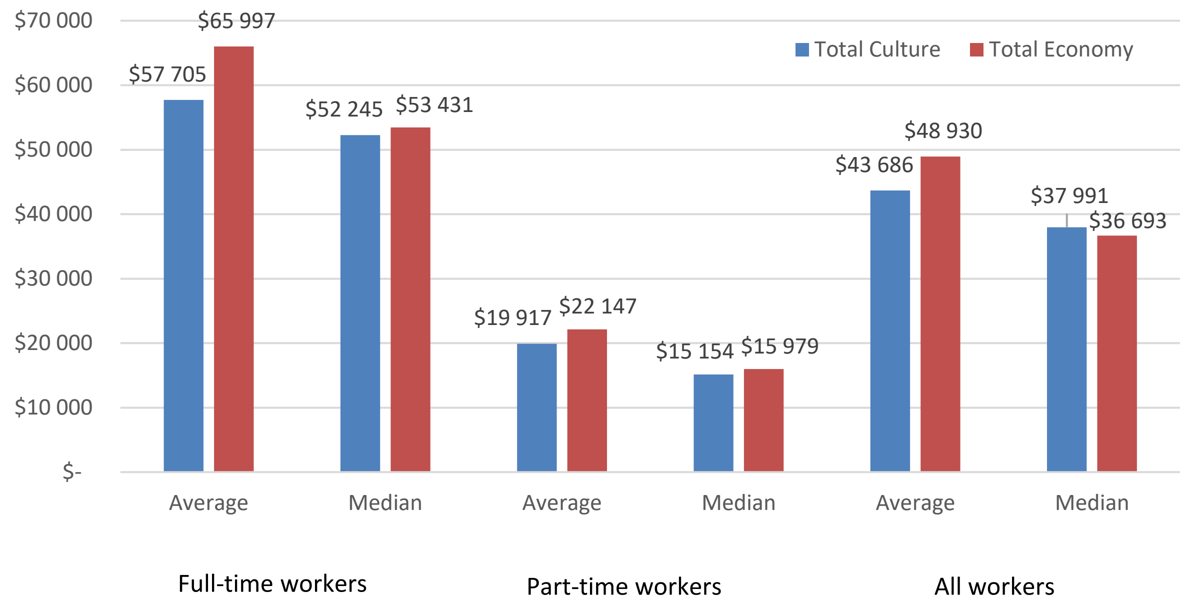



Source: Statistics Canada, 2016 Census.

The distribution of incomes within a sector can also be ascertained by looking at the differential between average and median incomes. The average wage is calculated as the sum of all of the annual wages paid in the sector divided by the number of workers in the sector. The median is the midpoint wage in the sector—the wage at which 50 per cent of wages are higher than the median and 50 per cent are lower than the median. A small difference indicates that incomes within the sector are distributed relatively evenly, while a large difference suggests that there are a few people within the sector who have a high income but that the majority have a low wage.

Compared with the Canadian labour force as a whole, cultural workers are characterized by a considerably lower differential between the average and median wage ($5,700 among cultural occupations vs. $12,200 in overall labour force). (See Chart 3.2.5.2.) This suggests that there are fewer cultural occupations with large income disparities. Among cultural occupational groups, the largest differentials between average and median wages are in creative and artistic production occupations and in cultural management occupations.

**Chart 3.2.5.2 Income Levels: Average vs. Median, 2015**




Source: Statistics Canada, 2016 Census.

## *3.3 Labour Market Performance of Cultural Occupations*

This section provides a more detailed analysis of the earnings profile of cultural occupation groups.

### 3.3.1 Creative and Artistic Production Occupations

| Indicator | Creative and artistic production | Total cultural sector | Total Canadian economy |
|---|---|---|---|
| **Employment** | **426,650** | **798,305** | **19,956,255** |
| Average income | $37,417 | $43,686 | $48,930 |

Source: Statistics Canada, *2016 Census.*

Creative and artistic production represents the largest cultural occupation group. It encompassed more than one-half of all cultural workers in 2015 (53 per cent) and includes many of the occupations traditionally associated with culture, such as actors, dancers, writers, and musicians.

Employment growth in creative and artistic production occupations rose 12 per cent between 2010 and 2015, significantly outpacing the 3.2 per cent growth in cultural occupations overall.[7] It should be noted, however, the strong growth coincided with the economic downtown in Canada around that time. Part of the growth therefore likely stemmed from unemployed workers from other sectors joining the cultural sector. Among the occupations that fall within this category, strong growth was recorded for "other

[7] Statistics Canada, 2011 and 2016 Census.

performers"—a category that includes circus performers, magicians, models, and puppeteers—(46 per cent), painters, sculptors, and other visual artists (34 per cent), and actors and comedians (27 per cent).

A few occupations saw a decrease in employment during this period: journalists suffered the highest decline (down 12 per cent), and editors registered a 4 per cent drop. The highest-paying occupations in this group were urban and land-use planners, with an average income of $73,935 in 2015, and architects, with income averaged at $72,885. The lowest-paid occupations in this group included dancers, with an average income of $16,005, and musicians and singers, with an average income of $18,734.

A study conducted by the Art Gallery of York University looked at the earnings of professional visual artists in Canada. The study "Waging Culture" found that the typical visual artist made $29,257 from all sources of income in 2012. Non-art-related sources of income are important for visual artists, making up about 27 per cent of their total income, on average. The study estimates that female artists make up 63 per cent of visual artists and work more hours in non-art-related activities than do male artists.[8]

### 3.3.2 Heritage Collection and Preservation Occupations

| Indicator | Heritage collection and preservation | Total cultural sector | Total Canadian economy |
|---|---|---|---|
| **Employment** | **19,510** | **798,305** | **19,956,255** |
| Average income | $54,722 | $43,928 | $48,930 |

Source: Statistics Canada, *2016 Census.*

The heritage collection and preservation occupational group consists of only four occupations: librarians, conservators and curators, archivists, and conservation and fishery officers. It is the smallest of the cultural occupational groups, accounting for only 2.4 per cent of all cultural workers. Between 2010 and 2015, the number of workers employed in this group decreased by almost one-quarter.

A distinctive feature of this group is the high level of educational attainments. Almost one half (47 per cent) of the workers employed in heritage collection and preservation occupations hold a master's degree or higher. In aggregate, more than two-thirds of the workers in this category are university-educated. Consequently, heritage occupations are characterized by one of the highest average incomes among all cultural occupations in 2015, at $54,722.

[8] Maranda, "Waging Culture 2012."

A detailed profile of the librarian workforce can be found in *8Rs Redux: CARL Libraries Human Resources Study*. The report presents the findings of a study examining the human resource challenges facing Canadian research libraries over the long term. It includes a demographic profile of Canadian research library personnel based on surveys conducted in 2013 and 2014. The study found that 52 per cent of library staff in Canada were librarians with a master of library and informational sciences (MLIS) degree. About 34 per cent were paraprofessionals who were working as library technicians, library assistants, and providers of information technology support. Of those who were librarians, 45 per cent worked in a supervisory or management role, and 79 per cent had been in their career for more than six years. The study also revealed a significant gender disparity among library personnel, as 69 per cent of librarians were female.[9]

### 3.3.3 Cultural Management Occupations

| Indicator | Cultural management | Total cultural sector | Total Canadian economy |
|---|---|---|---|
| **Employment** | **28,240** | **798,305** | **19,956,255** |
| Average income | $75,081 | $43,928 | $48,930 |

Source: Statistics Canada, *2016 Census.*

Similar to the heritage group, the cultural management occupational group consists of only five occupations: library, archive, and art gallery managers; managers in publishing, motion pictures, broadcasting, and live performing arts; supervisors of library, correspondence, and related clerks; architecture and science managers; and senior managers in broadcasting. This occupational group accounts for 3.5 per cent of all cultural employment. Overall employment in this group decreased by almost 13 per cent between 2010 and 2015.

As all the workers in this occupational group are at management level in their respective cultural establishments, they have the highest average income among all occupational groups. In 2015, workers in cultural management occupations had an average income of $75,081. It should be noted, however, this occupational group consists of workers in both for-profit and not-for-profit organizations. Jobs in for-profit institutions generally come with much higher compensation, and this results in a high average income.

[9] Delong, *8Rs Redux, CARL Libraries Human Resources Study*.

*The 2017 National Compensation Study for Management and Administration Positions in Not-for-Profit Arts Organizations* found that cultural management positions in arts organizations continue to lag other not-for-profit and private sectors in many areas of compensation and benefits. Thus, while the level of compensation may be high relative to other cultural occupations, it falls short relative to that of the economy as a whole. Staff turnover, limited career advancement opportunities, and inadequate succession planning are key challenges for attracting and retaining managers.[10]

### 3.3.4 Technical and Operational Occupations

| Indicator | Technical and operational | Total cultural sector | Total Canadian economy |
|---|---|---|---|
| **Employment** | **323,905** | **798,305** | **19,956,255** |
| Average income | $42,144 | $43,928 | $48,930 |

Source: Statistics Canada, 2016 Census.

Technical and operational occupations make up the second largest cultural occupational group, at 41 per cent of cultural workers. Employment in technical and operational occupations fell by 3.4 per cent between 2010 and 2015. Photographic and film processors suffered the biggest drop (down 54 per cent), predictably due to the filmmaking industry entering the digital era. In addition, many printing-related occupations witnessed a considerable slide in employment, such as printing machine operators (down 42 per cent) and binding and finishing machine operators (down 40 per cent). Conversely, many occupations experienced double-digit increases, including other technical support and co-ordinating occupations in motion pictures, broadcasting, and the performing arts (up 41 per cent). Support occupations in motion pictures, broadcasting, and the performing arts came a close second, gaining 39 per cent over the five-year period.

[10] CHRC and Mercer (Canada), *2017 National Compensation Study for Managerial and Administrative Positions in Not-for-Profit Arts Organizations*.

# 4. Cultural Sector Employers

This chapter and the following chapter present a quantitative perspective on the composition, size, and financial performance of the cultural sector using units of measurement linked to businesses and self-employed individuals attached to specific domains and subdomains of the cultural sector. Unlike the previous chapter, where employment in a cultural occupation was the primary lens of analysis, these two chapters focus on the industrial classification of businesses and self-employed individuals.

It should be noted that this perspective has the potential not only to underestimate the size of the sector but also to misrepresent how the sector operates because of the fact that many independent and self-employed workers are not included in the traditional data sources referenced. These are noted throughout the two chapters, and where applicable, suggestions to address these data gaps have been included in Chapter 10: Recommendations.

Many of the figures presented in this chapter on cultural sector employers rely on Statistics Canada's most recent Business Register data. In particular, the figures include information about the number, size, and geographic distribution of establishments that employ cultural workers.

This chapter also provides additional labour market information for each of the six core domains that fall within the cultural sector, according to the definition and scope of the sector outlined in Chapter 2. For a list of the types of establishments and industries included in each cultural domain, please see Appendix A.

## *4.1 Cultural Sector Establishments*

In 2016, there were 117,050 cultural establishments in Canada, representing 3 per cent of all establishments in the Canadian economy. Cultural establishments tend to be smaller, on average, than establishments in other sectors. Among the large establishments (ones with more than 500 employees), a third fall within the audio-visual and interactive media domain, particularly the broadcasting establishments. Meanwhile, sound recording is the only domain without large establishments.

## Table 4.1.1 Number of Cultural Establishments, 2016

| Culture domain | Indeterminate* | Small (1–99) | Medium (100–499) | Large (500+) | Total |
|---|---|---|---|---|---|
| **Heritage and libraries** | **860** | **2,362** | **72** | **11** | **3,305** |
| Archives | 68 | 79 | 2 | 1 | 150 |
| Libraries | 95 | 919 | 28 | 3 | 1,045 |
| Cultural heritage | 532 | 1,062 | 25 | 2 | 1,621 |
| Natural heritage | 165 | 302 | 17 | 5 | 489 |
| **Live performance** | **17,560** | **3,539** | **54** | **9** | **21,162** |
| Performing arts | 16,802 | 3,146 | 53 | 9 | 20,010 |
| Festivals and celebrations | 758 | 393 | 1 | - | 1,152 |
| **Visual and applied arts** | **32,513** | **14,169** | **101** | **9** | **46,792** |
| Original visual art | 6,385 | 856 | - | - | 7,241 |
| Art reproductions | 307 | 328 | 1 | - | 636 |
| Photography | 4,030 | 819 | 5 | - | 4,854 |
| Crafts | 185 | 205 | 6 | - | 397 |
| Advertising | 4,072 | 1,936 | 22 | 2 | 6,032 |
| Architecture | 7,889 | 4,404 | 22 | 1 | 12,316 |
| Design | 9,645 | 5,620 | 45 | 6 | 15,316 |
| **Written and published works** | **11,538** | **7,180** | **130** | **11** | **18,860** |
| Books | 1,172 | 414 | 9 | 2 | 1,597 |
| Periodicals | 847 | 797 | 7 | - | 1,651 |
| Newspapers | 969 | 1,333 | 31 | 5 | 2,338 |
| Other published works | 565 | 109 | 1 | - | 675 |
| Collected information | 105 | 101 | 8 | - | 214 |
| Multi-subdomain (e.g., supporting activity) | 7,880 | 4,426 | 74 | 4 | 12,385 |
| **Audio-visual and interactive media** | **16,811** | **7,607** | **228** | **24** | **24,669** |
| Film and video | 14,716 | 4,812 | 139 | 5 | 19,672 |
| Broadcasting | 1,194 | 1,658 | 66 | 16 | 2,934 |
| Interactive media | 901 | 1,137 | 23 | 3 | 2,063 |
| **Sound recording** | **1,569** | **689** | **4** | **-** | **2,262** |
| Sound recording | 344 | 89 | 1 | - | 434 |
| Music publishing | 1,225 | 600 | 3 | - | 1,828 |
| **Total culture** | **80,851** | **35,546** | **589** | **64** | **117,050** |
| **Total Canadian economy** | **2,631,372** | **1,241,007** | **21,745** | **2,999** | **3,897,123** |
| **Culture share of total economy** | 3.1% | 2.9% | 2.7% | 2.1% | 3.0% |

* Indeterminate establishments include establishments that do not have a payroll account, namely sole proprietorships, family businesses, and establishments that rely solely on contractual relationships.
Sources: Statistics Canada, **Business Register, December 2016**, compiled by The Conference Board of Canada.

The Business Register data is timely and detailed—down to the most granular level of the North American Industry Classification System (NAICS). However, the limitation of the data is that to be included in the Business Register, an establishment must meet one of the following three criteria:

- The establishment is an employer (i.e., has employees).
- The establishment is a corporate tax filer (i.e., is incorporated).
- The establishment is a GST/HST registrant (GST/HST registration is required only for individuals or businesses with sales that exceed $30,000 for one year).

**Many cultural establishments do not meet the criteria, particularly those that are made up of independent and/or self-employed workers and therefore are not included in the Business Register data. There is also some potential for the misclassification of industries represented by large enterprises involved in multiple lines of business.** For example, an internet streaming service provider such as Netflix would be recognized as an internet broadcasting enterprise in the Business Register (NAICS code 519130), as the majority of its output would fall within the film and video industry. However, there is also a production arm within this enterprise that should be classified in the registry under the motion picture and video production industry (NAICS code 512110). However as long as the individual establishments are coded based on a set of consistent criteria (e.g., financials, company structure), the Business Register provides a useful snapshot of the cultural sector.

## Table 4.1.2 Revenues of Cultural Establishments by Domain and Subdomain, 2013–2017 ($ millions)

| Cultural domain | Subdomain | 2013 | 2014 | 2015 | 2016 | 2017 |
|---|---|---|---|---|---|---|
| **Heritage and libraries** | Total | 1,048 | 1,077 | 1,162 | 1,261 | 1,273 |
| | Archives | 15 | 15 | 17 | 17 | 18 |
| | Libraries | 65 | 67 | 75 | 81 | 80 |
| | Cultural heritage | 649 | 676 | 729 | 796 | 795 |
| | Natural heritage | 319 | 319 | 341 | 366 | 381 |
| **Live performance** | Total | 3,655 | 3,825 | 4,184 | 4,443 | 4,549 |
| | Performing arts | 3,403 | 3,566 | 3,906 | 4,148 | 4,249 |
| | Festivals and celebrations | 252 | 259 | 278 | 295 | 300 |
| **Visual and applied arts** | Total | 12,247 | 13,049 | 13,539 | 13,887 | 14,625 |
| | Original visual art | 317 | 337 | 364 | 394 | 413 |
| | Art reproductions | 76 | 81 | 81 | 82 | 85 |
| | Photography | 1,061 | 1,116 | 1,194 | 1,217 | 1,287 |
| | Crafts | 819 | 748 | 775 | 819 | 749 |
| | Advertising | 2,859 | 3,266 | 3,458 | 3,497 | 3,538 |
| | Architecture | 2,194 | 2,244 | 2,219 | 2,177 | 2,257 |
| | Design | 4,921 | 5,258 | 5,448 | 5,700 | 6,296 |
| **Written and published works** | Total | 17,867 | 17,160 | 16,727 | 16,065 | 15,967 |
| | Books | 1,887 | 1,795 | 1,622 | 1,484 | 1,488 |
| | Periodicals | 2,333 | 2,213 | 2,041 | 1,903 | 1,932 |
| | Newspapers | 4,694 | 4,309 | 3,953 | 3,462 | 3,043 |
| | Other published works | 241 | 230 | 213 | 199 | 204 |
| | Collected Information | 476 | 447 | 414 | 387 | 395 |
| | Multi-subdomain | 8,235 | 8,165 | 8,485 | 8,631 | 8,906 |
| **Audio-visual and interactive media** | Total | 25,507 | 26,626 | 27,336 | 28,654 | 29,710 |
| | Film and video | 8,440 | 9,102 | 9,564 | 10,503 | 11,053 |
| | Broadcasting | 13,377 | 13,487 | 13,688 | 13,746 | 14,005 |
| | Interactive media | 3,690 | 4,037 | 4,084 | 4,405 | 4,653 |
| **Sound recording** | Total | 1,071 | 1,092 | 1,128 | 1,217 | 1,269 |
| | Sound recording | 175 | 178 | 187 | 199 | 206 |
| | Music publishing | 896 | 914 | 941 | 1,018 | 1,063 |
| **Education and training** | | 4,464 | 4,623 | 4,795 | 4,934 | 5,091 |
| **Governance, funding, and professional support** | | 13,382 | 13,811 | 14,171 | 14,278 | 14,797 |
| **Multidomain*** | | 1,107 | 1,132 | 1,231 | 1,252 | 1,274 |
| **Total cultural sector** | | 80,348 | 82,396 | 84,272 | 85,991 | 88,556 |

Source: Statistics Canada, Culture Satellite Account.

Note: "Multidomain" refers to the cases where one industry produces goods and services that cannot be readily allocated to a single domain, e.g., book, periodical and music stores (NAICS 4512).

## 4.2 Employer Profiles by Cultural Domain

The employer profiles in this section of the report contain standardized indicators on labour market information for each cultural domain based on the 2016 census. This section also includes the distinctive characteristics found using available data on employers at the cultural subdomain level.

### 4.2.1 Heritage and Libraries Domain

The heritage and libraries domain comprises a wide range of establishments that fall into the categories of cultural and natural heritage, libraries, and archives, most of which rely heavily on government support for their operations. These include museums, art galleries, archives, historic sites, buildings, community and nature parks, and conservation areas with interpretive or educational programs. Also included in this domain are exhibition centres, planetariums, observatories, aquariums, zoos, botanical gardens, and arboretums.

While conceptually all of the heritage and libraries establishments that meet these criteria fall under this domain, at the present time, only private institutions are captured by Statistics Canada's Culture Satellite Account. As a result, the following discussion depicts only a partial picture of the domain.

In 2017, private heritage and libraries establishments generated over $1.3 billion in revenues and employed over 15,000 workers.[11] Not surprisingly, only a small fraction (3.1 per cent) of workers were self-employed, 43 per cent were male, and slightly more than one-third (35.2 per cent) worked full-time. The average income among full-time workers in this domain was over $58,000 in 2015, while for part-time workers it was just over $19,000.

There are 3,300 private heritage and libraries establishments nationwide, of which 43 per cent are in Ontario and Quebec, with another 43 per cent in B.C. and the Prairies. Similar distribution is seen for large establishments, with well over a half of them (61 per cent) in Quebec and Ontario.

[11] Statistics Canada, Culture Satellite Account.

### Table 4.2.1.1: Employment in Heritage and Libraries Establishments

| Indicator | |
|---|---|
| **Total employment, 2017** | 15,012 |
| **Employee** | 14,547 |
| **Self-employed** | 465 (3.1% of employment) |
| **Unionization rate** | n.a. |
| **Gender split** | |
| **Male** | 43.3% |
| **Female** | 56.7% |
| **Employment status** | |
| **Full-time** | 35.2% |
| **Part-time** | 64.8% |
| **Average income, 2015** | |
| **Full-time** | $58,060 |
| **Part-time** | $19,139 |

Source: Statistics Canada, **2016 Census** and **Culture Satellite Account.**
Note: please consult Appendix A for the full list of industries included.

### Table 4.2.1.2: Number of Heritage and Libraries Establishments, 2016

| | Indeterminate* | Small (1–9) | Medium (10–99) | Large (100+) | Total |
|---|---|---|---|---|---|
| **Canada** | 860 | 1,848 | 514 | 83 | 3,305 |
| **Newfoundland and Labrador** | 24 | 54 | 27 | 1 | 106 |
| **Prince Edward Island** | 15 | 15 | 5 | - | 35 |
| **Nova Scotia** | 37 | 92 | 35 | 1 | 165 |
| **New Brunswick** | 22 | 72 | 16 | 3 | 113 |
| **Quebec** | 183 | 260 | 122 | 15 | 580 |
| **Ontario** | 245 | 445 | 127 | 36 | 853 |
| **Manitoba** | 69 | 117 | 15 | 2 | 203 |
| **Saskatchewan** | 43 | 320 | 19 | 3 | 385 |
| **Alberta** | 94 | 241 | 59 | 8 | 402 |
| **British Columbia** | 126 | 204 | 86 | 14 | 430 |
| **Territories** | 2 | 28 | 3 | - | 33 |

* Indeterminate establishments include establishments that do not have a payroll account, namely sole proprietorships, family businesses, and establishments that rely solely on contractual relationships.
Source: Statistics Canada, Business Register, December 2016.
Note: please consult Appendix A for the full list of industries included.

## Culture Heritage Subdomain

Private culture heritage establishments accounted for an estimated 62 per cent of revenues and 63 per cent of employment in the heritage and libraries domain in 2017. Of the 1,600 culture heritage establishments operating in Canada in 2016, 43 per cent were in Ontario and Quebec. Meanwhile, 16 out of 27 large culture heritage establishments were in Ontario and Quebec, with the rest scattered around in other provinces.

### Natural Heritage Subdomain

Private natural heritage is the second largest subdomain, making up 30 per cent of revenues and 33 per cent of employment in the heritage and libraries domain in 2017. There were 490 natural heritage establishments operating in Canada in 2016, of which well over a half were in Central Canada (58 per cent), 28 per cent were in B.C. and the Prairies, and the rest were scattered about in Atlantic Canada. Of the large natural heritage establishments, only one was in Atlantic Canada—in New Brunswick.

### Libraries Subdomain

Private libraries establishments made up 6.3 per cent of revenues and 3.3 per cent of employment in the heritage and libraries domain in 2017. In 2016, there were 1,050 libraries nationwide, of which just over a third were in Central Canada (35 per cent) and almost 60 per cent were in B.C. and the Prairies. A similar pattern was seen for large establishments: only two out of 31 large libraries were in Atlantic Canada.

### Archives Subdomain

Private archives make up the smallest subdomain under the heritage and libraries umbrella, accounting for only 1.4 per cent of revenues and 1 per cent of employment in the overall domain. Of the 150 archives establishments in Canada in 2016, close to two-thirds were in Central Canada (62 per cent).

By nature, archives are smaller in size: there are only three large establishments nationwide, all of which are in Central Canada. Only 13 per cent of all archives establishments employed more than 10 workers in 2016.

### 4.2.2 Live Performance Domain

The live performance domain represents a diverse group of performers and organizations engaged in the production of live entertainment, ranging from operas, orchestras, and circus arts to multidisciplinary events such as celebrations and festivals. The industries that fall within this domain include a broad spectrum of businesses and business practices, from large enterprises such as Cirque du Soleil to independent artists.

In 2017, live performance establishments generated over $4.5 billion in revenues and employed close to 60,000 workers.[12] Workers in the domain were predominately part-time (69 per cent) and more than half (53 per cent) were self-employed. The average income among full-time workers in this domain was $40,000 in 2015, while for part-time workers it was just over $20,000. Notably, given the relatively low average income and a high share of self-employment within the domain, the likelihood of some workers not being captured by the Business Register is higher than other domains.

[12] Statistics Canada, Culture Satellite Account.

Of the nearly 5,900 live performing arts establishments in Canada in 2016, 67 per cent were located in Ontario and Quebec. Meanwhile, 44 out of 63 large establishments (with more than 100 employees) were in these two provinces.

**Table 4.2.2.1: Employment in Live Performance Establishments**

| Indicator | |
|---|---|
| **Total employment, 2017** | 59,897 |
| **Employee** | 28,318 |
| **Self-employed** | 31,579 (52.7% of employment) |
| **Unionization rate** | n.a. |
| **Gender split** | |
| **Male** | 50.6% |
| **Female** | 49.4% |
| **Employment status** | |
| **Full-time** | 30.8% |
| **Part-time** | 69.2% |
| **Average income, 2015** | |
| **Full-time** | $40,019 |
| **Part-time** | $20,094 |

Source: Statistics Canada, 2016 Census and Culture Satellite Account.
Note: please consult Appendix A for the full list of industries included.

**Table 4.2.2.2: Number of Live Performance Establishments, 2016**

| | Indeterminate* | Small (1–9) | Medium (10–99) | Large (100+) | Total |
|---|---|---|---|---|---|
| **Canada** | 17,560 | 3,051 | 488 | 63 | 21,162 |
| **Newfoundland and Labrador** | 118 | 36 | 16 | - | 170 |
| **Prince Edward Island** | 43 | 17 | 3 | 1 | 64 |
| **Nova Scotia** | 278 | 70 | 13 | 1 | 362 |
| **New Brunswick** | 145 | 51 | 12 | - | 208 |
| **Quebec** | 4,919 | 890 | 155 | 22 | 5,986 |
| **Ontario** | 7,083 | 1,035 | 134 | 22 | 8,274 |
| **Manitoba** | 394 | 51 | 22 | 3 | 470 |
| **Saskatchewan** | 276 | 37 | 14 | - | 327 |
| **Alberta** | 1,253 | 194 | 42 | 7 | 1,496 |
| **British Columbia** | 3,030 | 657 | 75 | 7 | 3,769 |
| **Territories** | 21 | 13 | 2 | - | 36 |

* Indeterminate establishments include establishments that do not have a payroll account, namely sole proprietorships, family businesses, and establishments that rely solely on contractual relationships.
Source: Statistics Canada, Business Register, December 2016.
Note: please consult Appendix A for the full list of industries included.

### 4.2.3 Visual and Applied Arts Domain

The visual and applied arts is one of the more diverse domains, consisting of not only a wide range of individuals and establishments involved with creating, distributing, or selling original works of art, but also the artistic and creative arm of advertising, architecture, and design. The final products are visual in nature and may be multi-faceted, including drawing, painting, photography, printmaking, textile art, installation art, performance art, and a myriad of other similar forms of artistic expression. The workforce of this domain is composed mainly of independent artists, architects, designers, and craftspeople—close to one-quarter are self-employed.

Because of the independent nature of visual and applied arts industries, many artists working in this domain are largely responsible for generating their own revenues, whether through the distribution and sales of their own artwork or by exploring other funding sources such as government programs. The internet has opened up numerous marketing and sales opportunities for artists, but selling online is not an easy undertaking, as it requires technical and marketing skills that artists do not necessarily have. It also divides artists' time between studio production and administrative tasks, leaving less time for artists to work on their craft.

In 2017, visual and applied arts establishments generated nearly $15 billion in revenues and employed just over 116,800 workers[13]. The labour force was predominantly male (59 per cent), and more than a half (57 per cent) worked full-time in 2016. The average income among full-time workers in this domain was $73,500 in 2015, while part-time workers earned $35,800.

There were close to 47,000 visual and applied arts establishments operating in Canada in 2016, close to two-thirds of which were in the Ontario or Quebec. Another 28 per cent were in B.C. and Alberta, with the rest scattered around in the rest of provinces.

### Table 4.2.3.1: Employment in Visual and Applied Arts Establishments

| Indicator | |
|---|---|
| **Total employment, 2017** | 116,835 |
| Employee | 88,494 |
| Self-employed | 28,341 (24.3% of employment) |
| **Unionization rate** | n.a. |
| **Gender split** | |
| Male | 59.3% |
| Female | 40.7% |
| **Employment status** | |
| Full-time | 56.5% |
| Part-time | 43.5% |
| **Average income, 2015** | |
| Full-time | $73,487 |
| Part-time | $35,796 |

Source: Statistics Canada, 2016 Census and Culture Satellite Account.
Note: please consult Appendix A for the full list of industries included.

[13] Statistics Canada, Culture Satellite Account.

**Table 4.2.3.2: Number of Visual Arts and Crafts Establishments, 2016**

| | Indeterminate* | Small (1–9) | Medium (10–99) | Large (100+) | Total |
|---|---|---|---|---|---|
| **Canada** | 32,513 | 12,340 | 1,829 | 110 | 46,792 |
| **Newfoundland and Labrador** | 146 | 86 | 14 | 0 | 245 |
| **Prince Edward Island** | 51 | 34 | 4 | 0 | 90 |
| **Nova Scotia** | 444 | 152 | 33 | 2 | 631 |
| **New Brunswick** | 235 | 135 | 19 | 1 | 389 |
| **Quebec** | 7,603 | 2,343 | 476 | 27 | 10,448 |
| **Ontario** | 13,728 | 5,567 | 744 | 53 | 20,093 |
| **Manitoba** | 570 | 237 | 49 | 2 | 859 |
| **Saskatchewan** | 530 | 175 | 34 | 1 | 740 |
| **Alberta** | 3,910 | 1,676 | 175 | 13 | 5,775 |
| **British Columbia** | 5,248 | 1,908 | 273 | 13 | 7,442 |
| **Territories** | 47 | 26 | 7 | - | 81 |

* Indeterminate establishments include establishments that do not have a payroll account, namely sole proprietorships, family businesses, and establishments that rely solely on contractual relationships.
Source: Statistics Canada, Business Register, December 2016.
Note: please consult Appendix A for the full list of industries included.

### 4.2.4 Written and Published Works Domain

The written and published works domain represents a wide variety of publishing in the forms of books, periodicals, newspapers, etc. As in many other cultural industries, establishments in Canada's written and published works domain are contending with a sea change in the way consumers access their products. The rapid expansion of digital markets has forced publishing industries to quickly adopt new revenue strategies to respond to changing consumer preferences. Newspaper and magazine publishers are distributing content online and developing new subscription and advertising models to offset declining sales of physical copies. Book publishers are also becoming adept at marketing, promoting, and selling their products online, while positioning themselves for the mass-market adoption of electronic books and readers.

While much of the change in the written and published works domain over the past five to 10 years has been driven by consumer trends, the domain also endured a significant hit to revenues after the Canadian *Copyright Modernization Act* came into force in November 2012.[14] It has been reported that royalties have plummeted because of the exemptions to the copyright laws for educational institutions in the Act and how these exemptions were applied in practice. This has had a marked impact not only on activities associated with educational publishing but also on the incomes of Canadian writers, authors, and illustrators.[15]

Despite these challenges, written and published works establishments generated nearly $16 billion in revenues and employed about 102,000 workers in 2017.[16] Of those workers, almost one-quarter (24.4

[14] PricewaterhouseCoopers LLP, *Economic Impacts of the Canadian Educational Sector's Fair Dealing Guidelines.*
[15] PricewaterhouseCoopers LLP, pp. 7 and 10. f
[16] Statistics Canada, Culture Satellite Account.

per cent) were self-employed, 47 per cent were male, and slightly more than a half (52 per cent) worked full-time. The average income among full-time workers in this domain was just over $58,000 in 2015, while part-time workers earned just over $27,000.

Of the 18,900 written and published works establishments operating in Canada in 2016, well over two-thirds (69 per cent) were in Central Canada, more than one-quarter (27 per cent) were in B.C. and the Prairies, and the rest were in Atlantic Canada. Written and published works establishments tended to be smaller in employee size: only 10 per cent of establishments hired more than 10 workers.

### Table 4.2.4.1: Employment in Written and Published Works Establishments

| Indicator | |
|---|---|
| **Total employment, 2017** | 102,063 |
| **Employee** | 77,127 |
| **Self-employed** | 24,936 (24.4% of employment) |
| **Unionization rate** | n.a. |
| **Gender split** | |
| **Male** | 46.8% |
| **Female** | 53.1% |
| **Employment status** | |
| **Full-time** | 51.7% |
| **Part-time** | 48.3% |
| **Average income, 2015** | |
| **Full-time** | $ 58,052 |
| **Part-time** | $ 26,777 |

Source: Statistics Canada, 2016 Census and Culture Satellite Account.
Note: please consult Appendix A for the full list of industries included.

### Table 4.2.4.2: Number of Written and Published Works Establishments, 2016

| | Indeterminate* | Small (1–9) | Medium (10–99) | Large (100+) | Total |
|---|---|---|---|---|---|
| **Canada** | 11,538 | 5,466 | 1,715 | 141 | 18,860 |
| **Newfoundland and Labrador** | 54 | 67 | 19 | 1 | 141 |
| **Prince Edward Island** | 22 | 15 | 5 | - | 43 |
| **Nova Scotia** | 219 | 126 | 46 | 6 | 398 |
| **New Brunswick** | 133 | 90 | 47 | - | 271 |
| **Quebec** | 3,568 | 1,440 | 408 | 35 | 5,450 |
| **Ontario** | 4,634 | 2,113 | 663 | 69 | 7,478 |
| **Manitoba** | 248 | 196 | 57 | 8 | 510 |
| **Saskatchewan** | 160 | 127 | 45 | 2 | 334 |
| **Alberta** | 845 | 510 | 164 | 5 | 1,523 |
| **British Columbia** | 1,635 | 772 | 248 | 15 | 2,669 |
| **Territories** | 20 | 10 | 12 | - | 43 |

* Indeterminate establishments include establishments that do not have a payroll account, namely sole proprietorships, family businesses, and establishments that rely solely on contractual relationships.
Source: Statistics Canada, Business Register, December 2016.
Note: please consult Appendix A for the full list of industries included.

### 4.2.5 Audio-Visual and Interactive Media

The audio-visual and interactive media domain represents a wide range of businesses that engage in the production and dissemination of film, radio, TV, and interactive media content. The domain experienced noteworthy transformations in recent years, driven by shifts in consumer behaviour and technology advancement. Indeed, as Canadians further embrace internet-based film, radio, and TV services, Canadian media companies have undergone significant changes to their business models, marked by the rise of several digital distribution platforms. Meanwhile, the interactive media industry has witnessed rapid growth over the past decade with the emergence of electronic sports and mobile gaming.

Film, radio, TV, and broadcasting industries have faced a number of challenges in recent years as a result of changes in technology. The most notable challenges are on the distribution side, as the widespread use of the internet has reshaped the way Canadians consume media content, with significant implications for industry revenues, forcing the industries to adopt digital distribution platforms to accommodate new demand.

In addition, revenues in Canada's film, TV, and video production industry rely heavily on foreign location and service production, especially from the United States. As the exchange rate remains favourable for foreign producers, this revenue stream should continue to strengthen. On top of that, renewed support from federal and provincial governments through means of tax credits and incentive funds will help Canada solidify its position as a preferred production location.

Despite the rise of internet-based audio services, most Canadians remain loyal to radio. In 2017, 88 per cent of Canadians aged 18 and over tuned in to radio each month. On average, Canadian adults listened to about 15 hours of radio a week in 2017. The health of the industry is due in part to it being highly consolidated, thereby benefiting from economies of scale. In fact, the five largest radio operators reported 65 per cent of total commercial radio revenues in 2017.[17]

With the advent of new technologies such as virtual reality and the growing popularity of competitive gaming and mobile gaming, the interactive media industry has expanded rapidly in recent years. In addition, educational and institutional markets represent an important opportunity for the industry, as gamification has been recognized as a significant component of educational technology.[18] Going forward, with almost half of the revenues coming from foreign markets, Canadian interactive media companies will continue to benefit from the rapid growth of the global video game industry.

In 2017, audio-visual and interactive media establishments generated nearly $29.7 billion in revenues[19] and employed 128,000 workers. Of those workers, 12 per cent were self-employed, and almost half worked full-time (48 per cent). The average income for full-time workers was $70,400 in 2016, while part-time workers made less than half of that ($33,000).

[17] CRTC, *Communications Monitoring Report 2018*.
[18] Ontario Creates, *Interactive Industry Profile*.
[19] Statistics Canada, Culture Satellite Account.

Of the almost 25,000 establishments in audio-visual and interactive media in 2016, 86 per cent were in Ontario, Quebec, and British Columbia.

### Table 4.2.5.1: Employment in Audio-Visual and Interactive Media Establishments

| Indicator | |
|---|---|
| **Total employment, 2017** | 127,979 |
| **Employee** | 112,335 |
| **Self-employed** | 15,644 (12.2% of employment) |
| **Unionization rate** | n.a. |
| **Gender split** | |
| **Male** | 61.1% |
| **Female** | 38.9% |
| **Employment status** | |
| **Full-time** | 48.0% |
| **Part-time** | 52.0% |
| **Average income, 2015** | |
| **Full-time** | $70,409 |
| **Part-time** | $33,328 |

Source: Statistics Canada, 2016 Census and Culture Satellite Account.
Note: please consult Appendix D for the full list of industries included.

### Table 4.2.5.2: Number of Audio-Visual and Interactive Media Establishments, 2016

| | Indeterminate* | Small (1–9) | Medium (10–99) | Large (100+) | Total |
|---|---|---|---|---|---|
| **Canada** | 16,811 | 5,490 | 2,117 | 252 | 24,669 |
| **Newfoundland and Labrador** | 102 | 42 | 32 | 2 | 177 |
| **Prince Edward Island** | 28 | 21 | 10 | - | 59 |
| **Nova Scotia** | 400 | 93 | 76 | 2 | 570 |
| **New Brunswick** | 99 | 80 | 41 | 1 | 220 |
| **Quebec** | 3,930 | 1,299 | 580 | 71 | 5,880 |
| **Ontario** | 7,736 | 2,306 | 702 | 102 | 10,845 |
| **Manitoba** | 378 | 137 | 57 | 6 | 578 |
| **Saskatchewan** | 187 | 81 | 68 | 5 | 341 |
| **Alberta** | 871 | 305 | 220 | 23 | 1,419 |
| **British Columbia** | 3,038 | 1,109 | 318 | 40 | 4,505 |
| **Territories** | 43 | 18 | 13 | - | 75 |

* Indeterminate establishments include establishments that do not have a payroll account, namely sole proprietorships, family businesses, and establishments that rely solely on contractual relationships.
Source: Statistics Canada, Business Register, December 2016.
Note: please consult Appendix A for the full list of industries included.

The increased consolidation of enterprises in this domain only adds to the difficulty of identifying the distinct activities and associated financial performance of each subdomain. In theory, we can conceptualize the division between the various subdomains. However, in practice, there is a considerable overlap in activities. As an example, the data available for the radio subdomain include the production of radio programs and the broadcasting of radio programs. Similarly, some data in the television subdomain include activities associated with broadcasting, while some data in the broadcasting domain include television production activities.

Broadcasting is an activity that is hardest to isolate because of the way data for broadcasting is collected, specifically the overlap with the other subdomains—particularly radio and TV. While the following sections reflect our best efforts to isolate the activities and associated financial performance of each subdomain, caution should be used in interpreting the findings.

**Film and Video Subdomain**

Film and video establishments accounted for an estimated 37 per cent of revenues and 42 per cent of employment in the audio-visual and interactive media domain in 2017. The gender split in these establishments was similar to that of the overall domain. However, a higher proportion of workers in film and video establishments were self-employed (19 per cent for film and video vs. 12 per cent for overall domain) and part-time (62 per cent vs. 52 per cent). Given the fact that more workers in film and video are self-employed, the average income for both full-time and part-time workers was lower than in the overall domain.

In 2016, there were 19,672 film and video establishments in Canada, of which 88 per cent were in Ontario, Quebec, and British Columbia. Coincidentally, these are the three provinces that provide the most generous tax incentives for Canadian-controlled film and video businesses.

**Broadcasting Subdomain**

Broadcasting establishments account for an estimated 47 per cent of revenues and 29 per cent of employment in the audio-visual and interactive media domain. The gender split in broadcasting establishments is similar to that of the overall domain. However, close to 68 per cent of workers are full-time, and perhaps not surprisingly, most workers are employed (97 per cent). As a result, the average income for full-time and part-time workers in broadcasting is higher than that of the overall domain.

After several rounds of consolidation in the broadcasting industry, one predominant feature of this subdomain is its higher share of medium-sized to large organizations. Indeed, 32 per cent of establishments in this subdomain employ more than 10 workers. As is the case in other subdomains, the majority of broadcasting establishments (76 per cent) are in Ontario, Quebec, and British Columbia.

**Interactive Media Subdomain**

Interactive media establishments contribute an estimated 16 per cent of revenues and 29 per cent of employment to the overall domain. The shares of full-time workers and female workers in interactive media establishments are similar to those of the overall domain. Interestingly, while the average income for full-time workers in this subdomain is at the same level as the overall domain, part-time workers in interactive media establishments earn considerably less than the global average ($23,000 for interactive media vs. $33,000 for overall domain).

There are 2,063 interactive media establishments in Canada. Close to 80 per cent of them are in Ontario, Quebec, and British Columbia. Interactive media establishments are typically smaller in size. Among the 26 large establishments, 19 were based in Ontario and Quebec.

### 4.2.6 Sound Recording Domain

The digital revolution has had a profound impact on the sound recording domain in Canada and around the world. Listening to the music of one's preference is easier than ever before. In 2017, almost every Canadian (93 per cent) listened to recorded music, up from 89 per cent in 2016.[20] The growth, in part, stemmed from more convenient access to music through mobile channels such as smartphones and tablets.

The emergence of music streaming services has revolutionized the way Canadians listen to music. Unlike the traditional way of consuming music, where consumers had to purchase the track or album of choice, streaming services give consumers access to a music library containing millions of songs for a monthly fee. Music streaming, as a result, has grown exponentially, with 45 per cent of music consumers worldwide engaging in audio streaming.[21] In Canada, on-demand audio streaming now makes up more than a half (53 per cent) of total audio consumption.[22]

Canada's sound recording domain includes a vast array of participants, from small, independent artists to large multinational corporations. The industry is made up of musicians, songwriters, record labels, managers, concert promoters, and music publishers, who together create, promote, and market Canadian music. Music production and distribution industries are dominated by larger firms, but Canada also possesses a strong, independent sector made up mainly of small to medium-sized producers. All industry participants are faced with the challenge of developing and adjusting to new business models to ensure the industry navigates successfully through this period of rapid change.

In 2017, music establishments generated about $1.3 billion in revenues and employed 10,170 workers.[23] Of those workers, 20 per cent were self-employed, 58 per cent were male, and just over one-half (53 per cent) worked full-time. The average income among full-time workers was over $57,000 in 2015, while for part-time workers it was just over $26,000.

Of the almost 2,300 music establishments in 2016, 62 per cent were in Ontario and Quebec. All of the large establishments (with more than 100 employees) were in Ontario in 2016.

[20] Nielsen Canada, *Music 360 Canada Report 2017*.
[21] International Federation of the Phonographic Industry, *2017 Music Consumer Insight Report*.
[22] Nielsen Canada, *Music 360 Canada Report 2017*.
[23] Statistics Canada, Culture Satellite Account.

### Table 4.2.6.1: Employment in Sound Recording Establishments

| Indicator | |
|---|---|
| **Total employment, 2017** | 10,170 |
| **Employee** | 8,124 |
| **Self-employed** | 2,046 (20.1% of employment) |
| **Unionization rate** | n.a. |
| **Gender split** | |
| **Male** | 58.3% |
| **Female** | 41.7% |
| **Employment status** | |
| **Full-time** | 52.7% |
| **Part-time** | 47.3% |
| **Average income, 2015** | |
| **Full-time** | $57,431 |
| **Part-time** | $26,272 |

Source: Statistics Canada, 2016 Census and Culture Satellite Account.
Note: please consult Appendix A for the full list of industries included.

### Table 4.2.6.2: Number of Sound Recording Establishments, 2016

| | Indeterminate* | Small (1–9) | Medium (10–99) | Large (100+) | Total |
|---|---|---|---|---|---|
| **Canada** | 1,569 | 525 | 164 | 4 | 2,262 |
| **Newfoundland and Labrador** | 17 | 12 | 1 | - | 30 |
| **Prince Edward Island** | 5 | 6 | - | - | 11 |
| **Nova Scotia** | 44 | 10 | 5 | - | 59 |
| **New Brunswick** | 27 | 12 | 3 | - | 42 |
| **Quebec** | 309 | 125 | 24 | - | 458 |
| **Ontario** | 676 | 203 | 65 | 4 | 948 |
| **Manitoba** | 51 | 11 | 7 | - | 69 |
| **Saskatchewan** | 31 | 16 | 5 | - | 52 |
| **Alberta** | 140 | 46 | 20 | - | 206 |
| **British Columbia** | 264 | 85 | 35 | - | 384 |
| **Territories** | 4 | - | - | - | 4 |

* Indeterminate establishments include establishments that do not have a payroll account, namely sole proprietorships, family businesses, and establishments that rely solely on contractual relationships.
Source: Statistics Canada, Business Register, December 2016.
Note: please consult Appendix A for the full list of industries included.

# 5. Financial Performance of Cultural Domains

This chapter profiles the financial performance and health of businesses that operate within the six core cultural domains. This information is important in understanding the cultural labour market, as it directly affects the supply of and demand for workers in this sector, as well as the supply of cultural goods and services. These profiles are useful for organizations operating in the cultural sector, as well as for those who work, or plan to work, in the sector. For further details about the composition of each cultural domain, please refer to Appendix A.

The profiles include a brief overview of the financial performance of each domain, followed by a presentation of the latest key financial indicators available for each domain.

It should be noted that data challenges and gaps emerged while these profiles were being developed. As a result, there are inconsistencies in the amount of financial data presented for each domain. A detailed discussion of these gaps and challenges is presented in Chapter 9.

**Table 5.1 Revenue Composition of Canada’s Cultural Sector**

| Domains | Government support* | Exports | Domestic consumption and others |
|---|---|---|---|
| Heritage and libraries** | 2.2% | 14.1% | 83.7% |
| Live performance | 20.8% | 22.0% | 57.2% |
| Visual and applied arts | 2.9% | 51.7% | 45.4% |
| Written and published works | 3.1% | 10.6% | 86.3% |
| Audio-visual and interactive media | 13.5% | 11.5% | 75.0% |
| Sound recording | 5.3% | 38.5% | 56.2% |
| Multidomain | 6.4% | 40.3% | 53.4% |
| **Total culture products** | **16.8%** | **18.6%** | **64.6%** |

Sources: Statistics Canada, Culture Satellite Account; Survey of Provincial/Territorial Government Expenditures on Culture; Survey of Federal Government Expenditures on Culture; Survey of Household Spending; Provincial and Territorial Gross Domestic Product by Income and by Expenditure Accounts, compiled by The Conference Board of Canada.
* Government support was calculated based on the most recent data dated to fiscal 2009–10 and may not depict the full picture of government support on all domains.
** In conformity with the Culture Satellite Account, the heritage and libraries domain includes only private institutions.

## *5.1 Heritage and Libraries*

Unfortunately, Statistics Canada discontinued the Annual Survey of Service Industries: Heritage Institutions in 2011, so the most recent financial data date back to 2010. Nonetheless, the data still help paint a picture of overall financial performance for businesses in this domain.

Excluding libraries and archives, total operating revenues for heritage establishments in Canada grew at an annual rate of 2.4 per cent between 2008 and 2010. Among the subdomains of heritage establishments, art museums and galleries clocked in the highest annual growth rate, at 4.2 per cent. Revenues of natural heritage (zoos and botanical gardens), on the other hand, remained almost flat. Profitability among subdomains was uneven, with only museums and natural heritage managing to keep their bottom line in the black between 2008 and 2010.

**Table 5.1.1: Performance of Heritage Establishments**

| Indicator | 2008 | 2009 | 2010 |
|---|---|---|---|
| **Operating revenue ($ millions)** | **1,195** | **1,232** | **1,282** |
| Art museums and galleries | 256 | 281 | 290 |
| Museums | 596 | 613 | 642 |
| Historic and heritage sites | 88 | 85 | 92 |
| Zoos and botanical gardens | 255 | 253 | 258 |
| **Operating expenses ($ millions)** | **1,173** | **1,203** | **576** |
| Art museums and galleries | 266 | 285 | 124 |
| Museums | 575 | 590 | 293 |
| Historic and heritage sites | 89 | 83 | 45 |
| Zoos and botanical gardens | 244 | 245 | 114 |
| **Salaries, wages, and benefits ($ millions)** | **521** | **547** | **1,242** |
| Art museums and galleries | 111 | 123 | 287 |
| Museums | 255 | 272 | 622 |
| Historic and heritage sites | 41 | 40 | 90 |
| Zoos and botanical gardens | 114 | 111 | 243 |
| **Operating profit margin** | | | |
| Art museums and galleries | -4.0% | -1.2% | 0.9% |
| Museums | 3.6% | 3.7% | 3.1% |
| Historic and heritage sites | -0.7% | 2.3% | 2.1% |
| Zoos and botanical gardens | 4.6% | 3.1% | 5.9% |

Sources: Statistics Canada, Annual Survey of Service Industries: Heritage Institutions.
Note: regularly captured usage and financial performance data for libraries and archives in Canada are currently not available. The survey was discontinued in 2011; 2010 was the last year with data available.

## *5.2 Live Performance*

The live performance domain relies heavily on government support. In fiscal year 2009–10, close to 21 per cent of total revenues stemmed from government support, compared with 17 per cent for the overall cultural sector. All three levels of governments supported the live performing arts in 2009–10, with the federal government providing the largest portion of funding.

Total operating revenues for the live performance companies increased 5.8 per cent between 2014 and 2016. The highest rates of growth were for musical groups and artists (12 per cent) and dance companies (8.1 per cent). The operating profit margin of live performing arts industries increased slightly between 2014 and 2016, from 11.7 per cent to 12.0 per cent. The pattern, however, was mixed among different subdomains. In 2016, musical groups and artists retained the highest profit margin, whereas musical and theatre companies recorded losses in aggregate.

In addition, Statistics Canada's Annual Survey of Service Industries: Spectator Sports, Event Promoters, Artists and Related Industries provides performance indicators for three industry segments that fall partly into the live performing arts domain: promoters of performing arts, sports, and similar events (NAICS 7113), agents and managers for artists, athletes, entertainers, and other public figures (NAICS 7114), and independent artists, writers, and performers (NAICS 7115).

The latest data suggest aggregate revenues for promoters (NAICS 7113) and agents (NAICS 7114) stayed relatively flat between 2013 and 2017. Operating revenues for independent artists, writers, and performers (NAICS 7115), on the other hand, have been growing at a healthy pace since 2013. **While the operating profit margin floated around almost 40 per cent, it should be noted that unpaid hours spent on practice and preparation for independent artists and performers are often underreported and thus inflate the profitability.**

**Table 5.2.1: Performance of Live Performance Establishments**

| Financial indicator | 2014* | 2016 |
|---|---|---|
| **Total live performance companies** | | |
| Operating revenue ($ millions) | 2,038 | 2,157 |
| Operating expenses ($ millions) | 1,800 | 1,897 |
| Salaries, wages, commissions, and benefits ($ millions) | 514 | 490 |
| Operating profit margin | 11.7% | 12.0% |
| **Theatre (except musical) companies** | | |
| Operating revenue ($ millions) | 511 | 546 |
| Operating expenses ($ millions) | 499 | 537 |
| Salaries, wages, commissions, and benefits ($ millions) | 170 | 176 |
| Operating profit margin | 2% | 2% |
| **Musical theatre and opera companies** | | |
| Operating revenue ($ millions) | 171 | 173 |
| Operating expenses ($ millions) | 165 | 175 |
| Salaries, wages, commissions, and benefits ($ millions) | 54 | 56 |
| Operating profit margin | 4% | -2% |
| **Dance companies** | | |
| Operating revenue ($ millions) | 160 | 173 |
| Operating expenses ($ millions) | 138 | 153 |
| Salaries, wages, commissions, and benefits ($ millions) | 52 | 56 |
| Operating profit margin | 13% | 12% |
| **Musical groups and artists** | | |
| Operating revenue ($ millions) | 785 | 879 |
| Operating expenses ($ millions) | 616 | 673 |
| Salaries, wages, commissions, and benefits ($ millions) | 121 | 121 |
| Operating profit margin | 22% | 23% |

Sources: Statistics Canada, Survey of Service Industries: Performing Arts.
* The survey runs every two years.

**Table 5.2.2: Performance of Promoters, Agents, and Independent Artists, Writers, and Performers**

| Financial indicator | 2013 | 2014 | 2015 | 2016 | 2017 |
|---|---|---|---|---|---|
| **Promoters (presenters) of performing arts, sports and similar events** | | | | | |
| Operating revenue ($ millions) | 3,319 | 3,507 | 3,253 | 3,253 | 3,481 |
| Operating expenses ($ millions) | 3,245 | 3,385 | 3,263 | 3,251 | 3,500 |
| Salaries, wages, commissions, and benefits ($ millions) | 673 | 719 | 705 | 715 | 772 |
| Operating profit margin | 2% | 4% | 0% | 0% | -1% |
| **Agents and managers for artists, athletes, entertainers, and other public figures** | | | | | |
| Operating expenses ($ millions) | 337 | 331 | 336 | 325 | 367 |
| Salaries, wages, commissions, and benefits ($ millions) | 112 | 106 | 99 | 93 | 104 |
| Operating profit margin | 18% | 20% | 19% | 21% | 21% |
| **Independent artists, writers, and performers** | | | | | |
| Operating revenue ($ millions) | 1,628 | 1,652 | 1,788 | 2,086 | 2,140 |
| Operating expenses ($ millions) | 1,004 | 1,008 | 1,115 | 1,278 | 1,297 |
| Salaries, wages, commissions, and benefits ($ millions) | 200 | 195 | 224 | 268 | 274 |
| Operating profit margin | 38% | 39% | 38% | 39% | 39% |
| Sources: Statistics Canada, Annual Survey of Service Industries: Spectator Sports, Event Promoters, Artists and Related Industries. | | | | | |

## *5.3 Visual and Applied Arts*

Canadian households spent on average $161 on visual and applied arts products in 2017, up from $130 the year before. Meanwhile, exports of visual and applied arts products registered one of the strongest growth rates in the cultural sector between 2012 and 2016, expanding at an annual rate of 9.4 per cent. In 2016, nearly $7.2 billion worth of Canadian visual and applied arts products were exported, consisting of more than half (52 per cent) of total exports of cultural products that year.

As is the case with many cultural domains, government support is not a major source of revenues for the visual and applied arts domain. In fiscal year 2009–10, only 2.9 per cent of total revenues in the domain stemmed from government support.

There is currently no comprehensive data from Statistics Canada on the financial performance of the establishments in the visual arts and crafts domain (thus the absence of data tables in this section). One reason for this is the domain is dominated by visual artists and craftspeople working in their own practice rather than in a small business or other enterprise.

## 5.4 Written and Published Works

Canadian household spending on written and published works has declined in recent years. In 2017, average household spending on books fell to $101, down from $120 in 2013. Average household spending on newspaper, magazines, and periodicals dropped to $36, down from $47 in 2013.

With household spending on a downward trend, exports of written and published works became the new source of growth. In 2016, exports of written and published works totalled $1.7 billion in Canada, up 31 per cent from 2012.

In general, the written and published works domain does not rely on government support. In fiscal 2009–10, only 3.1 per cent of total revenues generated in the domain stemmed from government support.

Operating revenues of book publishing, periodical publishing, and newspaper publishing industries have been on downward trajectory in recent years, although profitability has been steady. While reading is still one of the most popular leisure activities in Canada,[24] the decline in revenues is evidence of fast-changing consumer preferences. In addition, although conventional printed books remain the most popular form of books (74 per cent of all books shipped in 2016), sales of e-books and audiobook are on the rise.

**Table 5.4.1: Performance of Book Publishing Establishments**

| Financial indicator | 2014 | 2016 |
|---|---|---|
| Operating revenue ($ millions) | 1,659 | 1,649 |
| Operating expenses ($ millions) | 1,500 | 1,480 |
| Salaries, wages, commissions, and benefits ($ millions) | 387 | 380 |
| Operating profit margin | 10% | 10% |
| **Sales channels (as a share of total sales)** | | |
| Internet sales of print titles | 11% | 12% |
| Sales of e-books | 12% | 14% |
| Sales of print titles (not on internet) | 76% | 74% |
| Sources: Statistics Canada, **Survey of Service Industries: Book Publishers**. | | |

**Table 5.4.2: Performance of Periodical Publishing Establishments**

| Financial indicator | 2013* | 2015 | 2017 |
|---|---|---|---|
| Operating revenue ($ millions) | 1,968 | 1,591 | 1,307 |
| Operating expenses ($ millions) | 1,791 | 1,388 | 1,172 |
| Salaries, wages, commissions, and benefits ($ millions) | 581 | 456 | 401 |
| Operating profit margin | 9% | 13% | 10% |
| Sources: Statistics Canada, Survey of Service Industries: Periodical Publishers.<br>* The survey runs every two years. | | | |

[24] BookNet Canada, "What Are Canadians up to in Their Free Time?"

**Table 5.4.3: Performance of Newspaper Publishing Establishments**

| Financial indicator | 2014* | 2016 |
|---|---|---|
| Operating revenue ($ millions) | 3,964 | 3,180 |
| Operating expenses ($ millions) | 3,596 | 3,001 |
| Salaries, wages, commissions, and benefits ($ millions) | 1,319 | 1,126 |
| Operating profit margin | 9% | 6% |
| **Detailed operating statistics** | | |
| Operating revenues | | |
| Advertising sales | 64% | 63% |
| Circulation sales | 21% | 23% |
| Custom printing sales | 2% | 3% |
| Distribution of flyers and inserts | 10% | 9% |
| All other revenues | 3% | 3% |
| Operating expenses | | |
| Cost of goods sold | 13% | 13% |
| Salaries, wages, commissions, and benefits | 37% | 38% |
| Office and computer related expenses | 10% | 6% |
| All other costs and expenses | 40% | 43% |

Sources: Statistics Canada, Survey of Service Industries: Newspaper Publishers.
* The survey runs every two years.

## 5.5 Audio-Visual and Interactive Media

**The audio-visual and interactive media domain has grown at a steady pace in recent years, in both revenues and profitability.** Indeed, Canada has achieved considerable success in the export of film and television production goods and services, through the sales of Canadian shows to international networks and the hosting of production of foreign movies and TV series in Canada (which count as exports). In addition, as the home of close to 600 gaming studios, many of which are top international video game developers, Canada exports a considerable amount of integrative digital media products every year.[25] Exports of audio-visual and interactive media products totalled nearly an estimated $3.3 billion in 2016.

Government support is another important source of revenues for this domain. An estimated 13.5 per cent of total revenues generated in this domain come from government support. Generally, around half of federal government spending on culture goes to the broadcasting subdomain every year, primarily to the Canadian Broadcasting Corporation. Federal, provincial, and territorial governments also support a wide variety of other programs, through direct investment and through a series of tax credits.

As a newer player in the cultural sector, the interactive media industry has received growing support from all levels of governments. A variety of government programs are in place to support Canadian interactive media ventures, including the federal government's Canadian Media Fund and the Ontario

[25] Entertainment Software Association of Canada, *Canada's Video Game Industry 2017*.

government's Ontario Creates Interactive Media Fund. In addition to public funding, some provincial governments also offer support through tax breaks.

The film, television, and video production and post-production industries saw strong growth in revenues in 2017 while maintaining profitability. Meanwhile, the film and video distribution industry had stronger growth in revenues in 2017, but its spending rose, eroding the industry's operating margins.

With the advent of online streaming services, revenues of the television broadcasting industry have been on a steady decline since their peak in 2013. The shift in consumption patterns is forcing broadcasters to adopt new distribution strategies, either by making episodes of conventional programs available on the internet or by launching their own streaming platforms.

Meanwhile, similar trends have been seen in the radio broadcasting industry. Since their peak in 2013, both revenues and profitability have been on a steady downward slope. The number of radio stations, however, didn't see such decline, signalling the resilient popularity of radio among Canadian listeners.

**Table 5.5.1: Performance of Film, Television, and Video Production Establishments**

| Financial indicator | 2013* | 2015 | 2017 |
|---|---|---|---|
| Operating revenue ($ millions) | 5,217 | 6,738 | 8,262 |
| Operating expenses ($ millions) | 4,905 | 6,164 | 7,536 |
| Salaries, wages, and benefits ($ millions) | 1,720 | 2,045 | 2,661 |
| Operating profit margin | 6.0% | 8.5% | 8.8% |

Sources: Statistics Canada, Survey of Service Industries: Film, Television and Video Production.
* The survey runs every two years.

**Table 5.5.2: Performance of Film and Video Distribution Establishments**

| Financial indicator | 2013* | 2015 | 2017 |
|---|---|---|---|
| Operating revenue ($ millions) | 1,912 | 2,151 | 2,269 |
| Operating expenses ($ millions) | 1,547 | 1,787 | 1,974 |
| Salaries, wages, commissions, and benefits ($ millions) | 116 | 118 | 136 |
| Operating profit margin | 19% | 17% | 13% |
| **Breakdown of operating statistics** | | | |
| Operating revenues | | | |
| Revenue from distribution of film and video titles | 75% | 82% | 87% |
| Wholesaling of pre-recorded videos | 24% | 17% | 13% |
| All other operating revenue | 1% | 1% | 1% |
| Operating expenses | | | |
| Cost of goods sold | 27% | 26% | 24% |
| Salaries, wages, commissions, and benefits | 8% | 7% | 7% |
| Royalties franchise fees and memberships | 31% | 35% | 39% |
| Advertising, marketing, promotions, meals, and entertainment | 19% | 18% | 20% |
| All other costs and expenses | 17% | 15% | 11% |

Sources: Statistics Canada, Survey of Service Industries: Film and Video Distribution.
* The survey runs every two years.

### Table 5.5.3: Performance of Film, Television, and Video Post-Production Establishments

| Financial indicator | 2013* | 2015 | 2017 |
|---|---|---|---|
| Operating revenue ($ millions) | 832 | 1,107 | 1,403 |
| Operating expenses ($ millions) | 755 | 996 | 1,260 |
| Salaries, wages, commissions, and benefits ($ millions) | 364 | 525 | 717 |
| Operating profit margin | 9% | 10% | 10% |
| **Breakdown of operating statistics** | | | |
| Operating revenues | | | |
| Editing services for audiovisual works | 9% | 6% | 8% |
| Visual effects and animation services for audiovisual works | 45% | 54% | 59% |
| 3D Visual effects and animation services for audiovisual works | 10% | 11% | 11% |
| Subtitling, titling, and captioning services | 3% | 2% | 1% |
| Sound editing and design services | 5% | 5% | 3% |
| All other operating revenue | 27% | 21% | 18% |
| Operating expenses | | | |
| Cost of goods sold | 11% | 7% | 8% |
| Salaries, wages, commissions, and benefits | 48% | 53% | 57% |
| All other costs and expenses | 41% | 40% | 35% |

Sources: Statistics Canada, Survey of Service Industries: Film and Video Post-Production.
* The survey runs every two years.

### Table 5.5.4: Performance of Television Broadcasting Establishments

| Financial indicator | 2013 | 2014 | 2015 | 2016 | 2017 |
|---|---|---|---|---|---|
| Operating revenue ($ millions) | 7,593 | 7,569 | 7,421 | 7,485 | 7,123 |
| Operating expenses ($ millions) | 6,521 | 6,733 | 6,688 | 6,634 | 6,183 |
| Salaries and other staff benefits ($ millions) | 1,675 | 1,653 | 1,591 | 1,527 | 1,356 |
| Net operating income ($ millions) | 955 | 729 | 575 | 672 | 777 |

Sources: Statistics Canada, Radio and Television Broadcasting Survey.

### Table 5.5.5: Performance of Radio Establishments

| Financial indicator | 2013 | 2014 | 2015 | 2016 | 2017 |
|---|---|---|---|---|---|
| Operating revenue ($ millions) | 2,000 | 1,968 | 1,951 | 1,916 | 1,892 |
| Operating expenses ($ millions) | 1,669 | 1,681 | 1,653 | 1,619 | 1,613 |
| Net operating income ($ millions) | 939 | 927 | 910 | 877 | 870 |
| Salaries and other staff benefits ($ millions) | 315 | 266 | 273 | 272 | 253 |
| Number of stations | 941 | 924 | 929 | 939 | 952 |

Sources: Statistics Canada, Radio and Television Broadcasting Survey.

## 5.6 Sound Recording

While almost every Canadian (93 per cent) listened to recorded music in 2017, household spending on sound recording products dropped dramatically between 2013 and 2017. Canadians spent less than half on music content in 2017 than in 2012. The downfall in spending coincided with the rise of music streaming services, which offer a wider selection of music for a monthly fee. Meanwhile, increasing number of Canadians are using YouTube to listen to music: 84 per cent of Canadian YouTube users access music content according to an International Federation of the Phonographic Industry (IFPI) report.[26]

Despite the overall downward trend in spending among Canadians, exports of sound recording products have been on a steady upward trajectory. Exports of sound recording products totalled close to $470 million in 2016, up from $390 million five years prior. Meanwhile, support from various levels of governments has remained stable.

Operating revenues of the Canadian record production (and integrated production and distribution) industry surged to $577 million in 2017, up 28 per cent from 2015. At the same time, profitability remained stable.

Canada's music publishing industry has been growing at a healthy clip, registering $329 million in revenues in 2017. Between 2013 and 2017, operating revenues grew at an annual rate of 4.9 per cent.

Healthy growth was seen in the sound recording industry as well. Operating revenues rose steadily between 2013 and 2017. With operating expenses increasing at a slower pace, profit margins were pushed up to 17 per cent in 2017.

**Table 5.6.1: Performance of Record Production and Integrated Record Production and Distribution Establishments**

| Financial indicator | 2013* | 2015 | 2017 |
|---|---|---|---|
| Operating revenue ($ millions) | 510 | 451 | 577 |
| Operating expenses ($ millions) | 488 | 426 | 540 |
| Salaries, wages, commissions, and benefits ($ millions) | 64 | 61 | 78 |
| Operating profit margin | 4% | 6% | 6% |

Sources: Statistics Canada, **Survey of Service Industries: Sound Recording and Music Publishing**.
* The survey runs every two years.

[26] International Federation of the Phonographic Industry, *2017 Music Consumer Insight Report*.

### Table 5.6.2: Performance of Music Publishing Establishments

| Financial indicator | 2013* | 2015 | 2017 |
|---|---|---|---|
| Operating revenue ($ millions) | 259 | 281 | 329 |
| Operating expenses ($ millions) | 230 | 249 | 294 |
| Salaries, wages, commissions, and benefits ($ millions) | 50 | 54 | 62 |
| Operating profit margin | 11% | 11% | 11% |

Sources: Statistics Canada, Survey of Service Industries: Sound Recording and Music Publishing.
* The survey runs every two years.

### Table 5.6.3: Performance of Sound Recording Establishments

| Financial indicator | 2013* | 2015 | 2017 |
|---|---|---|---|
| Operating revenue ($ millions) | 121 | 131 | 140 |
| Operating expenses ($ millions) | 105 | 112 | 115 |
| Salaries, wages, commissions, and benefits ($ millions) | 33 | 36 | 35 |
| Operating profit margin | 14% | 14% | 17% |

Sources: Statistics Canada, Survey of Service Industries: Sound Recording and Music Publishing.
* The survey runs every two years.

# 6. Economic Overview of the Cultural Sector

This chapter presents an economic overview of the cultural sector, using the most recent economic and financial data available. This information is important for understanding the cultural labour market, as the economic and financial health of the sector directly affects the current and future supply and demand for labour, as well as the availability of cultural goods and services. In addition, the units of measurement reported are those that government, business, and other financially affiliated entities rely on to make investment decisions based on comparable metrics.

The chapter begins with a discussion of the economic indicators that have the largest influence on the economic performance of the cultural sector: the sector's real value-added output (that is, gross domestic product, or GDP), Canadian household spending on cultural goods and services, Canadian exports of cultural goods and services, and government support of the cultural sector. Real gross domestic product (GDP) is a standard measure of industry output and is equal to the total value that the industry creates. As such, it is a measure of the industry's contribution to economic growth. Specifically, value-added or net output is the difference between total revenues generated and the sum of expenses on parts, materials, and services used in the production process.

The chapter then continues with a discussion of the financial performance of the six core domains that make up the cultural sector, according to the definition and scope of the sector outlined in Chapter 2. It centres on the recent financial performance of each domain. The section also identifies some of the opportunities and challenges that establishments in these domains are expected to face over the near term.

For a list of the types of establishments and industries included in each cultural domain, please see Appendix A.

## *6.1 Real Value-Added Output (or GDP) of the Cultural Sector*

**Overall, real value-added output of Canada's cultural sector expanded 5 per cent between 2013 and 2017 (that is, an annual rate of 1 per cent).** Given that the cultural sector consists of many heterogeneous industries, the growth of each domain differs. Among the core cultural domains, the sound recording domain delivered the strongest growth over the five-year period, clocking in a 6.6 per cent annual growth rate. This was followed by heritage and libraries and by live performance domains, expanding at annual rates of 4.3 per cent and 3.2 per cent respectively. On the flip side, GDP in the written and published works domain was 13.3 per cent lower in 2017 than in 2013 (for an annual drop of 2.8 per cent), underscoring the significant challenges resulting from shifts in consumption patterns and the downfall of physical publications.

## Table 6.1: Cultural Sector Real Value-Added Output (GDP), Industry Perspective, 2013–2017 ($ millions)

| Domains | Subdomains | 2013 | 2014 | 2015 | 2016 | 2017 |
|---|---|---|---|---|---|---|
| **Heritage and libraries** | **Total** | **492** | **514** | **561** | **602** | **608** |
| | Archives | 7 | 7 | 8 | 9 | 9 |
| | Libraries | 27 | 30 | 36 | 40 | 40 |
| | Cultural heritage | 296 | 314 | 345 | 372 | 371 |
| | Natural heritage | 162 | 163 | 172 | 182 | 188 |
| **Live performance** | **Total** | **1,915** | **2,009** | **2,128** | **2,206** | **2,241** |
| | Performing arts | 1,790 | 1,878 | 1,988 | 2,060 | 2,094 |
| | Festivals and celebrations | 125 | 130 | 140 | 145 | 147 |
| **Visual and applied arts** | **Total** | **6,773** | **7,282** | **7,552** | **7,671** | **7,903** |
| | Original visual art | 180 | 187 | 194 | 202 | 208 |
| | Art reproductions | 38 | 39 | 38 | 39 | 42 |
| | Photography | 529 | 580 | 610 | 622 | 641 |
| | Crafts | 251 | 242 | 257 | 262 | 247 |
| | Advertising | 1,617 | 1,749 | 1,876 | 1,856 | 1,871 |
| | Architecture | 1,365 | 1,472 | 1,444 | 1,443 | 1,496 |
| | Design | 2,792 | 3,013 | 3,132 | 3,246 | 3,398 |
| **Written and published works** | **Total** | **8,679** | **8,300** | **7,972** | **7,709** | **7,521** |
| | Books | 852 | 810 | 745 | 689 | 642 |
| | Periodicals | 1,093 | 1,029 | 959 | 905 | 855 |
| | Newspapers | 2,342 | 2,139 | 1,958 | 1,776 | 1,602 |
| | Other published works | 116 | 109 | 102 | 96 | 92 |
| | Collected Information | 226 | 210 | 197 | 186 | 177 |
| | Multi-subdomain | 4,050 | 4,003 | 4,011 | 4,056 | 4,154 |
| **Audio-visual and interactive media** | **Total** | **12,400** | **13,350** | **12,361** | **12,485** | **12,723** |
| | Film and video | 3,545 | 4,387 | 3,258 | 3,397 | 3,503 |
| | Broadcasting | 6,455 | 6,310 | 6,442 | 6,362 | 6,308 |
| | Interactive media | 2,400 | 2,652 | 2,661 | 2,727 | 2,911 |
| **Sound recording** | **Total** | **396** | **441** | **471** | **506** | **543** |
| | Sound recording | 68 | 76 | 82 | 87 | 90 |
| | Music publishing | 328 | 365 | 388 | 419 | 453 |
| **Education and training** | | 3,378 | 3,494 | 3,602 | 3,696 | 3,826 |
| **Governance, funding, and professional support** | | 7,517 | 7,825 | 7,866 | 7,910 | 8,191 |
| **Multidomain*** | | 638 | 658 | 697 | 716 | 723 |
| **Total cultural products** | | 42,189 | 43,872 | 43,209 | 43,501 | 44,279 |
| **All other products**** | | 12,269 | 13,174 | 13,556 | 13,979 | 14,570 |
| **Total cultural industries** | | 54,458 | 57,045 | 56,765 | 57,480 | 58,849 |
| Statistics Canada, Culture Satellite Account. | | | | | | |

*Multidomain refers to the cases where one industry produces goods and services that cannot be readily allocated to a single domain, e.g., book, periodical, and music stores (NAICS 4512).
** All other products includes all non-cultural products that are produced in the cultural industries.

## 6.2 Household Consumption on Cultural Goods and Services

**Canadian household spending on cultural goods and services decreased by 3.4 per cent between 2016 and 2017. In the same year, total current household spending (less taxes, savings, and gifts/contributions) grew by 2.5 per cent.** The same trend persisted over a longer time span: Canadians spent over 10 per cent less on cultural goods and services in 2017 than they did in 2013. In comparison, total current household spending rose 8.8 per cent over those five years.

Spending among the core cultural domains followed a similar trend, except for visual and applied arts, which saw a 5.2 per cent increase over five years. **The largest drop was seen in the sound recording domain: Canadian households spent well less than half of what they spent five years before on sound recording products and services in 2017 (down 59 per cent compared with 2013). This coincides with the rise in recent years of online streaming services, whose "freemium" business model** (offering basic services for free, while additional features such as removing advertisement are provided via paid subscriptions) **offers Canadians a more cost-effective way of listening to music.**

**Table 6.2: Canadian Consumer Spending, 2013–2017 ($ millions)**

| Domains | 2013 | 2014 | 2015 | 2016 | 2017 |
|---|---|---|---|---|---|
| Heritage and libraries | 1,194 | 636 | 969 | 1,148 | 972 |
| Live performance | 1,763 | 1,627 | 1,858 | 2,238 | 1,451 |
| Visual and applied arts | 2,220 | 2,034 | 1,858 | 1,865 | 2,336 |
| Written and published works | 5,024 | 3,998 | 4,610 | 4,419 | 4,483 |
| Audio-visual and interactive media | 10,728 | 10,520 | 10,396 | 10,229 | 10,142 |
| Sound recording | 1,207 | 828 | 780 | 674 | 493 |

Source: Statistics Canada, Survey of Household Spending, compiled by The Conference Board of Canada.

## 6.3 Exports of Cultural Products

**Exports of Canadian cultural products registered solid growth between 2012 and 2016, expanding at 6.8 per cent annually.** All of the domains saw strong expansion in product exports, with visual and applied arts and heritage and libraries growing at an annual pace of more than 9 per cent over the five-year period.

**Table 6.3.1: Exports of cultural products, 2002–2016 ($ millions)**

| Domains | Subdomains | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|---|---|---|---|---|---|
| **Heritage and libraries** | Total | 114 | 140 | 134 | 159 | 178 |
| | Archives | 1 | 1 | 2 | 2 | 2 |
| | Libraries | 2 | 4 | 5 | 9 | 10 |
| | Cultural heritage | 91 | 107 | 99 | 113 | 125 |
| | Natural heritage | 20 | 28 | 29 | 34 | 41 |
| **Live performance** | Total | 652 | 833 | 716 | 861 | 978 |
| | Performing arts | 625 | 805 | 686 | 825 | 937 |
| | Festivals and celebrations | 26 | 29 | 31 | 36 | 42 |
| **Visual and applied arts** | Total | 4,574 | 6,392 | 5,955 | 7,039 | 7,182 |
| | Original visual art | 54 | 67 | 69 | 86 | 95 |
| | Art reproductions | - | - | - | - | - |
| | Photography | 7 | 4 | 4 | 5 | 6 |
| | Crafts | 2,871 | 4,386 | 3,948 | 4,967 | 5,054 |
| | Advertising | 367 | 383 | 357 | 502 | 506 |
| | Architecture | 590 | 682 | 662 | 626 | 623 |
| | Design | 685 | 870 | 917 | 852 | 899 |
| **Written and published works** | Total | 1,297 | 1,342 | 1,538 | 1,778 | 1,701 |
| | Books | 336 | 320 | 399 | 431 | 437 |
| | Periodicals | 134 | 125 | 151 | 164 | 153 |
| | Newspapers | 119 | 89 | 122 | 158 | 151 |
| | Other published works | 70 | 70 | 71 | 84 | 59 |
| | Collected Information | 86 | 70 | 67 | 78 | 54 |
| | Multi-subdomain | 553 | 668 | 729 | 864 | 847 |
| **Audio-visual and interactive media** | Total | 2,651 | 2,905 | 2,983 | 3,336 | 3,287 |
| | Film and video | 1,868 | 1,877 | 1,945 | 2,344 | 2,087 |
| | Broadcasting | 141 | 94 | 101 | 104 | 108 |
| | Interactive media | 642 | 934 | 937 | 888 | 1,092 |
| **Sound recording** | Total | 387 | 409 | 389 | 492 | 469 |
| | Sound recording | 129 | 143 | 132 | 149 | 125 |
| | Music publishing | 257 | 267 | 257 | 343 | 343 |
| **Education and training** | | 313 | 332 | 402 | 443 | 458 |
| **Governance, funding, and professional support** | | 1,121 | 1,164 | 1,174 | 1,210 | 1,250 |
| **Multidomain*** | | 419 | 466 | 410 | 478 | 504 |
| **Total cultural sector** | | 11,527 | 13,983 | 13,702 | 15,797 | 16,007 |

Source: Statistics Canada, Provincial and Territorial Gross Domestic Product by Income and by Expenditure Accounts.

## *6.4 Government Support of the Cultural Sector*

**Direct financial support of the cultural sector from federal, provincial, territorial, and municipal governments increased steadily between the fiscal years of 2005–06 and 2009–10, at an annual growth rate of 4.1 per cent.** In the fiscal year ending in 2010, spending by all three levels of government totalled over $9.6 billion. This included operational and capital spending, as well as grants, contributions, and transfers, but excluded tax credits.

It should be noted that tax credits are a key component of government support, in particular for businesses falling under the subdomain of film and TV. These credits are available from the federal and all provincial and territorial governments, but the degree of support varies from year to year, depending on the number of cultural establishments and programs that qualify for the credits.

The federal government provided a total of $4.1 billion to the cultural sector in 2009–10 fiscal year. More than one-half of federal support (55 per cent) went to broadcasting (primarily to the Canadian Broadcasting Corporation), while 35 per cent was allocated to heritage (e.g., museums, parks, and historic sites) and national libraries.

That same fiscal year, provincial and territorial government support of culture totalled $2.9 billion, while municipal governments also provided $2.9 billion. Provincial and territorial governments allocated the biggest share of their cultural spending to libraries (32 per cent), followed by the heritage sector (22 per cent). At the municipal level, the vast majority of spending in the cultural sector was for libraries.

To provide a perspective on the degree to which the operation of Canada's cultural sector relies on various levels of government funding, data on government expenditures were used to calculate the proportion of cultural business revenues attributed to government funding. While this level of government spending data from Statistics Canada is dated (2009–2010 was the most recent release), it still helps to present a picture of the role that various levels of government play in the operation of the sector. In aggregate, government funding contributed an estimated 16.8 per cent of the total revenues of the cultural sector in Canada. (See Table 5.4.1.)

**The most recent *Government Expenditures on Culture* report, which was used to gather the data in this section, does not reflect government support of recently expanded segments of the cultural sector, including interactive digital media. In addition, as the heritage and libraries domain under Culture Satellite Account framework includes only private institutions, the Conference Board created a separate category for public heritage and libraries, in order to report government support of public institutions. Given that the revenues of public heritage, archive, and library institutions are not available in the Culture Satellite Account, their overall reliance on government support is not available.**

## Table 6.4.1: Dependency of Canada's Cultural Sector on Government Support, 2009–10 ($ millions)

| Domains | Federal government | Provincial government | Municipal government | Total government | Overall reliance (as a % of total revenues) |
|---|---|---|---|---|---|
| Heritage and libraries* | 3 | 5 | 12 | 19 | 2.2% |
| Live performance | 264 | 244 | 154 | 662 | 20.8% |
| Visual and applied arts | 57 | 118 | 154 | 328 | 2.9% |
| Written and published works | 203 | 137 | 258 | 597 | 3.1% |
| Audio-visual and interactive media | 2,345 | 457 | 310 | 3,111 | 13.5% |
| Sound recording | 30 | 12 | 14 | 56 | 5.3% |
| Public heritage and libraries** | 1,226 | 1,885 | 2,036 | 5,147 | n.a. |
| Multidomain | 16 | 31 | 13 | 60 | 6.4% |
| **Total cultural sector** | **4,142** | **2,889** | **2,950** | **9,981** | **16.8%** |

Source: Statistics Canada, Culture Satellite Account; Survey of Provincial/Territorial Government Expenditures on Culture; Survey of Federal Government Expenditures on Culture.

* In conformity with the Culture Satellite Account, the heritage and libraries domain includes only private institutions.

** The public heritage and libraries domain includes government operated libraries, culture/natural heritage, and public archives.

# 7. Cultural Sector Consultations

As opposed to how the cultural sector is seen from the outside, this chapter provides insights into how the sector sees itself. Input from cultural workers, businesses, and organizations represents a vital source of labour market information for the cultural sector. This input was obtained through two online surveys and a series of regional focus groups and interview sessions.

The consultations with cultural sector participants and organizations provided valuable input about the regional and occupational labour issues affecting the cultural sector in Canada now and in the coming years. The findings from these industry consultations helped shape the final projections of the long-term forecast for labour supply and demand in Canada's cultural sector.

## 7.1 Focus Group Sessions

The focus-group phase was an important step in preparing the qualitative portion of this labour market information report to better interpret the quantitative analyses. Initially, six focus groups were to be held, one each in Vancouver, Calgary, Winnipeg, Toronto, Montréal, and Halifax. The cities of Moncton, Charlottetown, St. John's, Regina, and Whitehorse were added for further consultations. This allowed for CHRC and the Conference Board to consult with over 160 cultural sector workers and employers from across the country and from the various cultural domains.

The discussions began with a retrospective look at the performance of the cultural sector from the perspective of the Culture Satellite Account and preliminary projections from the Conference Board's labour supply and demand model. With this background, participants openly discussed a broad range of issues and concerns that not only affected their careers in the sector but also broadly affected their sector. Two major themes were common to all of the focus groups and endemic to the sector in an economically perverse relationship: scarcity of resources and abundance of available production. This report explores these two themes along with the sector's vulnerability to economic forces. Feedback from the focus groups included a consistent ideological challenge to both the nomenclature used in current information tools and the accuracy with which they depict or mine information about cultural work.

### 7.1.1 Scarcity of Resources

**Monetary Issues**

Monetary issues—including lack of revenues, difficulty offering competitive wages, precarity of work, and the general difficulty of securing funding and revenue streams—appeared to be the common thread throughout the discussions with for-profit and non-profit organizations and individuals. This issue is supported by the findings in this study that while 3.6 per cent of the Canadian labour force worked in the cultural sector during 2015, the sector contributed only 2.7 per cent of the total Canadian GDP that year.

Meanwhile, while many employers reported that their employees were satisfied and engaged in the work and tasks that needed to be accomplished, ultimately, it was difficult to retain employees due to a lack of benefits offered or a reduction in paid-hours to cope with shrinking budgets. On top of that, participants said cultural organizations are often understaffed and so workers need to work extra hours to fulfill their responsibilities.[27] As a result, "people are constantly leaving the sector for better pay elsewhere."[28]

Multiple focus-group participants said limited budgets are preventing their organizations from hiring more experienced staff who can take on more responsibilities, leaving an experience vacuum between the head of the organization and junior staff.[29] As a result, the senior leadership often needs to take on extra work.

The following statement from a focus-group meeting offers an interesting perspective on the scarcity of resources and how it translates into everyday life for cultural work: "The state *should* be subsidizing the arts.... However, it is the non-profits that are subsidizing the state by doing the work in culture at a deficit! [The] non-profit cultural sector is subbing in for the for-profit cultural sector."[30]

**Shortage of Qualified Personnel**

The scarcity of monetary resources limits organizations' ability to attract and hire qualified personnel. The necessity to take on multiple simultaneous roles was frequently noted across the country as a deterrent to retention.

In addition, the imbalance in available resources between rural and urban areas and other demographic settings can exacerbate the challenge. As a participant in Winnipeg said, "There needs to be a critical mass of artistic activity in a region in order for certain types of skills to be present; e.g., tour logistical support; classical music librarian; skilled, available classical musicians."

On many occasions, succession planning was noted as a key issue within organizations. The gap between senior roles and the next in line in terms of experience and authority is prevalent. This phenomenon is attributable to two factors. First, there is a lack of qualified personnel to move up and take on the role of senior manager or CEO. Second, qualified employees are often not interested in moving into these roles because of the heavy responsibilities, high time commitment, and high expectations without a rate of pay that reflects the work required.

A similar sectoral retention challenge is also present among mid-level and mid-career workers. Lack of upward mobility can be caused by senior manager and CEO roles being kept indefinitely by the same person for one of the reasons stated earlier: the lack of benefits extends to little or no pension plan. They simply can't retire. Senior-level workers and managers must work until they're older, thus creating a bottleneck for promising younger careerists.

[27] Halifax focus group.
[28] Winnipeg focus group.
[29] Winnipeg and St. John's focus group.
[30] Halifax focus group.

Another difficulty that was discussed numerous times is that even at an entry level, expectations are high in regard to worker performance and required skills. Training prior to entering the workforce was also often noted as inadequate. On-the-job learning is seen as an indispensable asset that benefits the worker somewhat more than the organization.

Some provinces noted a lack of access to arts and culture management training.[31]

**Goodwill Dependency**

Many arts and cultural organization representatives at the focus-group meetings mentioned their reliance on unpaid labour: "We have adopted an expectation of volunteerism."[32]

"Volunteers provide a lot of unpaid cultural work. Sometimes these are people who provide low-level clerical assistance, and other times they are people with specialized knowledge who are willing to work without pay or beyond what they are being paid to do."[33] In many focus groups, it was noted that workers, often at the managerial level, would simply put in the hours regardless of the pay.

### 7.1.2 Vulnerability to Economic Forces

Expressed in many other terms across the country, the cultural sector is vulnerable to all of Porter's five forces.[34] The following paragraphs summarize some of the discussions related to this framework of five competitive forces that shape every industry.

The *threat of substitution* applies both within the cultural sector and with other sectors. In other words, cultural industries are not only competing against each other (e.g., ballet production vs. orchestra production) but also "competing against sports events"[35] (e.g., an art gallery opening vs. a hockey game). The inter-sectoral competition is a distinct characteristic of the cultural scoter, as other sectors in the economy do not usually have inter-sectoral competition in terms of attracting customers.

The permeability of the sector allows workers from other sectors to enter and exit the cultural sector's activities so long as they can deliver even at a modest capacity, or the *threat of new entry*. (For example, a full-time carpenter might also play the guitar in a bar on the weekend, or an elementary school teacher might also sell art on the side.) This factor is exacerbated by new technology platforms with which artistic content and cultural products can be easily uploaded, sold, distributed, or shared in business to consumer (B2C), business to business (B2B) and even peer to peer (P2P) arrangements.

This furthers the *buyer power* of the five forces. While there are a multitude of buyers for cultural products, the sheer volume of available workers, precarity of work, and inherently low wages discussed

[31] Halifax, Winnipeg, Calgary, Moncton focus groups.
[32] Whitehorse focus group.
[33] Winnipeg focus group.
[34] Porter, "How Competitive Forces Shape Strategy."
[35] Winnipeg focus group.

earlier contribute to keeping cultural purchases undervalued. "Pay what you can"[36] models are now more and more prevalent just so that artists can keep producing.

Although it is not the most influential of the five forces for the cultural sector, *supplier power* must also be considered. A painter or sculptor is vulnerable to fluctuating prices (whether through inflation or other factors). Not many painters are able to achieve economies of scale by making sufficient bulk material purchases. This also highlights the intra- and inter-sectoral difficulties: for larger projects in particular, "revenues vs. production costs are prohibitive."[37] Artistic productions—an opera for example—require a heavy outlay in terms of costs simply to get the work started without any guarantee of financial return.

Last but not least, *competitive rivalry* is high, given the number of offerings and the apparent market saturation. Constant available supply in a demand-driven economic environment means that cultural sector organizations must differentiate their offerings in a way that translates into added-value to the purchaser or consumer rather than creating higher margins for the cultural and artistic workers who ultimately want to attain living wages.

### 7.1.3 Abundance of Available Production

As seen earlier, creative output and supply are almost infinite. There will most likely never be a shortage of front-line creators and performers. This reality is well captured in the "gig economy" tendency, where many Canadian workers—cultural and non-cultural—are no longer committed to a single job or position.

Many findings in the data about the cultural workforce's employment status are reinforced by anecdotal evidence. As one focus-group participant noted: "the creative labour force has more gig-based, short-term, part-time, or erratic employment that is not characterized by the traditional employer–employee relationships. This labour force is more highly educated though less likely to have stable income, benefits, or long-term financial security. Workers in the creative labour force are also most likely working to some degree in other industries (whether by desire or out of the need to complement their income). Therefore, this highly educated creative workforce becomes an asset across other industries as well, benefiting the full breadth of the economy, particularly where innovation is required."[38]

Participants argued necessity is the mother of invention. By nature, creative people will find ways to ultimately create wherever need be: "we are shapeshifters."[39] Referring to live performance occupations such as dancers, actors, and musicians, a participant in the Vancouver focus group said, "Every day of the week, I can be in any one of those roles." The passion to create and/or perform and the basic economic need to find income mean that "as a performer, you're always in transition."[40]

[36] Calgary, Vancouver focus groups.
[37] Toronto focus group.
[38] Manitoba focus group.
[39] Vancouver focus group.
[40] Vancouver focus group.

**"—preneurs"**

The cultural sector is a "very wide network of micro-employers."[41] With many self-employed workers typically having to create their own market space and needing to constantly adapt, the notion of "multi-preneurs and solo-preneurs"[42] has developed. Already having to deal with their work in the cultural sector as a secondary employment or revenue source, workers must rely more and more on developing skill sets that aren't limited to artistic practice. This can take away from the craft that cultural workers wish to undertake. As a participant in St. John's noted, "many jump between jobs."

### 7.1.4 Nomenclature and the Accuracy of Current Information Gathering

The widespread opinion among focus-group participants was that the nomenclature used by official sources is outdated. Job titles as defined by the North American Industry Classification System and National Occupational Classification were deemed "static"[43] and incomprehensive. As a participant of the focus group in Toronto said, "The paradigm of continuous employment model doesn't apply in the cultural sector." These classifications systems for industries and occupations were unpopular in every focus group across Canada. A participant in Regina argued it would be advantageous to "discuss skills, not job descriptions." Participants in different cities would also spontaneously break out and discuss the difficulties in hiring with government support programs due to the strictness of the requirements and their lack of correspondence with actual hiring needs.

Again, due to the multiple roles that many cultural workers must take on simultaneously, participants argued that the boundaries between industry and occupation should be eliminated. The easiest illustration of this is musicians. Not many musicians perform *only* on stage or work *only* in recording studios. Many have also dabbled in composing and arranging as well as being managers of some sort. The current statistic framework excludes the fact that they may also be working outside the sector. For instance, dancers have shorter stage-performance careers, and most must also teach during their performance years to earn enough income to survive.[44] A participant argued that "if the boundaries between disciplines are lessening, it is possible that the cultural sector's boundaries and professional practices or the manner in which we attempt to define them also need transforming."[45]

Participants argued that current data gathering methods create many blind spots by assigning workers to a specific job title in a single industry. A concern with the information gathering and accuracy was also raised by a participant in St. John's: "as a self-managed artist/one-person show, someone pays themselves as an actor but not as a producer or director as well, (thus) the numbers could be deflated."

[41] Halifax focus group.
[42] Regina focus group.
[43] Whitehorse focus group.
[44] Winnipeg, Calgary, Vancouver, Montreal, Toronto, Moncton, Charlottetown, St John's focus groups
[45] Montreal focus groups

There was a consensus that if the information gathering tools better reflected the realities of the sector, there would be a lesser need to conduct as many surveys.

**A Personal Perspective on the Cultural Workforce**

The story of a world-class dance professional illustrates many of the themes that came out in the focus groups: scarcity of resources, the need for cultural workers to take on different jobs and develop business skills, the abundance of available production and creativity, and the challenges associated with gathering accurate data on the cultural workforce.

After receiving ballet training through her formative and high-school years, T.C. became a professional Latin dancer and now competes internationally. This international standing leads to invitations to perform at other events and helps her attract dance students and boost her teaching rates.

But the costs related to maintaining this standing essentially negate most of the income generated by it. Her world-class professional sanction is obtained by entering international competitions that cost roughly as much to attend as the income generated by being invited to perform in other productions. And she is not compensated for the hours spent preparing for competitions and performances. On top of that, demand for dance classes is generally outside "9 to 5" hours, something that affects her work-life balance.

With a mix of previous management experience, formal training, creative design skills, and seamstress skills, T.C. identified a market opportunity and started her own business of Latin dance costume design and production. She sees this entrepreneurial endeavour as a retirement plan, given the lack of benefits associated with her main career. The time T.C. dedicates to this line of business and the revenues she receives from it often exceed the time she spends and revenues she receives from dancing or teaching. Therefore, under Statistics Canada's current data-capturing methods, T.C. would be categorized as being in the visual and applied arts domain as a "theatre, fashion, exhibit, and other creative designer" — instead of in the live performance domain as a "dancer," which is the root skill of her career.

## *7.2 Online Survey*

To provide insights into the cultural sector labour market information study, two online surveys were conducted across Canada between November 2018 and March 2019—one for cultural workers and one for cultural businesses. The purpose of the surveys was to identify trends and issues related to labour demand and supply; skills gaps and training; compensation and benefits; and equity-seeking groups among cultural sector participants and businesses, by region and by domain.

A total of 1,867 individuals and 311 businesses completed the 2018–19 online surveys. Table 7.2.1 and 7.2.2 present the distribution of respondents across various cultural domains. Respondents to the surveys had the choice to select the primary domain that most accurately reflected their involvement in the cultural sector.

**Table A: Survey Responses—Cultural Workers, 2018–19**

| Domains | Respondents | Per cent |
|---|---|---|
| Heritage and libraries | 381 | 20.4% |
| Live performance | 374 | 20.0% |
| Visual and applied arts | 369 | 19.8% |
| Written and published works | 147 | 7.9% |
| Audio-visual and interactive media | 277 | 14.8% |
| Sound recording | 34 | 1.8% |
| Education and training | 118 | 6.3% |
| Governance, funding, and professional support | 144 | 7.7% |
| All of the above | 23 | 1.2% |
| Total | 1,867 | 100.0% |

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

**Table B: Survey Responses—Cultural Businesses, 2018–19**

| Domains | Respondents | Per cent |
|---|---|---|
| Heritage and libraries | 53 | 17.0% |
| Live performance | 77 | 24.8% |
| Visual and applied arts | 62 | 19.9% |
| Written and published works | 36 | 11.6% |
| Audio-visual and interactive media | 25 | 8.0% |
| Sound recording | 4 | 1.3% |
| Education and training | 20 | 6.4% |
| Governance, funding, and professional support | 29 | 9.3% |
| All of the above | 5 | 1.6% |
| Total | 311 | 100.0% |

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Employer), 2018–19.

The results were not weighted to account for the regional or industry differences and should therefore be interpreted qualitatively. The following is a summary of the key findings from the survey results.

### *7.2.1 Survey Results—Cultural Worker Perspective*

#### Most Significant Trends and Issues Affecting Cultural Workers

Individuals were probed about the most significant challenges affecting their working life in the cultural sector. Considering that the cultural sector consists of a variety of heterogeneous working arrangements and activities, the most significant work-related challenges varied, to a certain degree, by domain. However, challenges stemming from being self-employed and working part-time were mentioned most frequently throughout most of the domains.

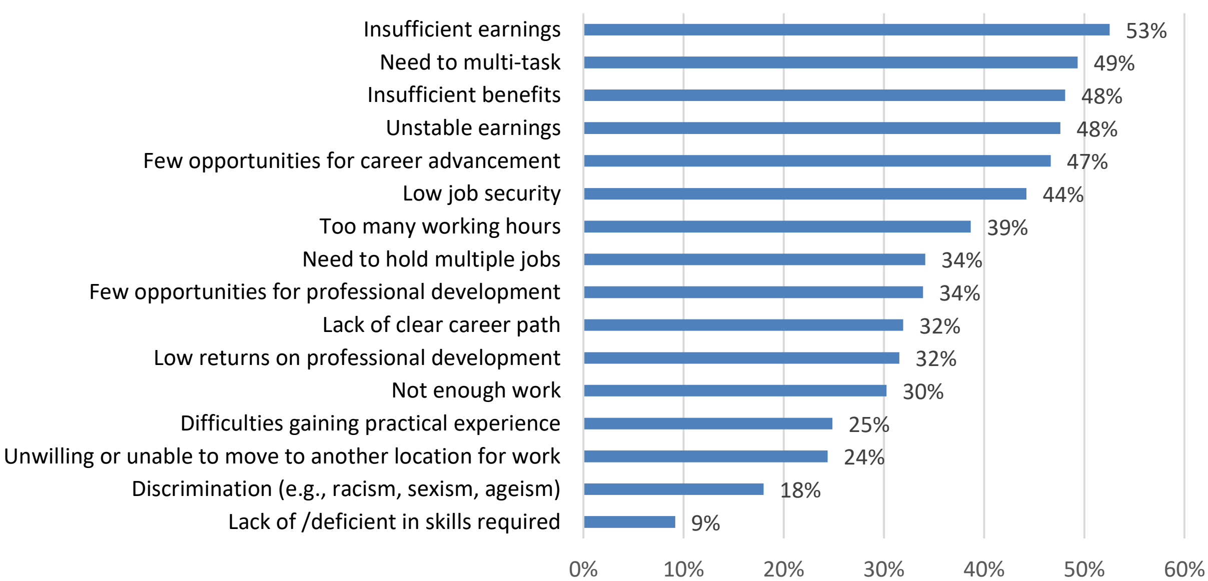
The survey results suggest that insufficient earnings and benefits are two of the most significant challenges facing cultural workers, cited by 53 per cent and 45 per cent of all respondents, respectively.

These challenges appear to be more pressing in domains characterized by high rates of self-employment and part-time working arrangement, including live performance, visual and applied arts, written and published works, and sound recording. In fact, close to 80 per cent of workers in sound recording cited insufficient earnings and benefits as obstacles in their working life.

In contrast, just one-third of workers in heritage and libraries reported challenges related to insufficient earnings and benefits, which perhaps isn't surprising given that the share of self-employment in this domain is the lowest in the cultural sector.

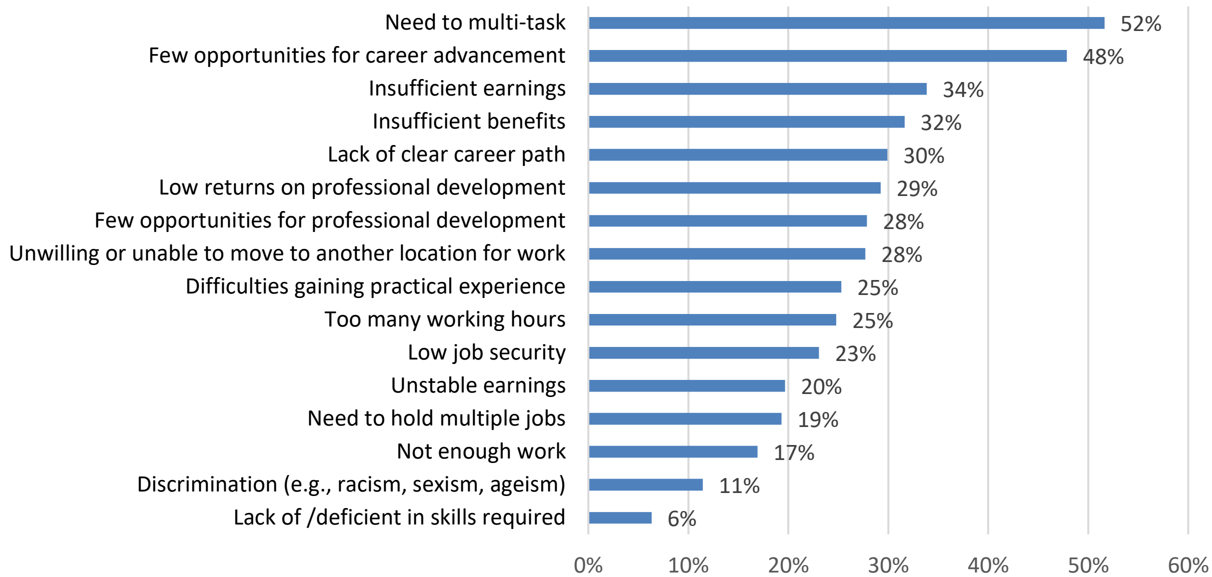
In addition, the need to multi-task appears to be another significant challenge facing cultural workers, cited by close to one-half (49 per cent) of respondents. The prevalent need to multi-task can be attributed to the complexity of tasks that cultural occupations usually entail. Moreover, this challenge can also be attributed to the high percentage of self-employed workers in the cultural sector, as many self-employed individuals are responsible not only for artistic and creative production but also for business-related tasks such as marketing and sales.

**Chart 7.2.1A: Job Challenges: Cultural Sector**



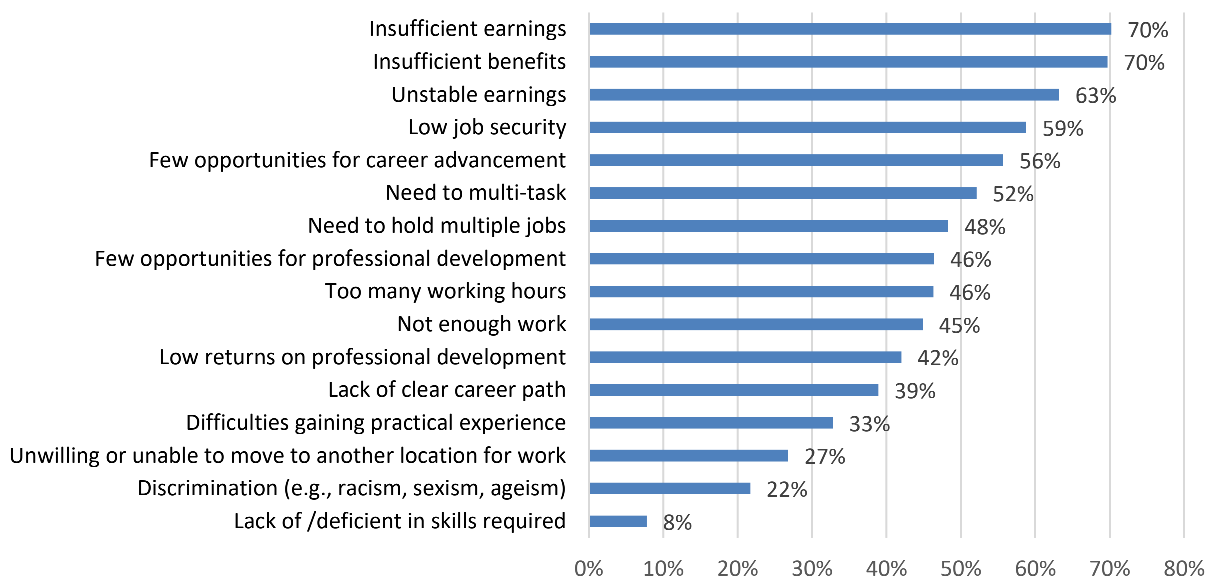

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

## Chart 7.2.1B: Job Challenges: Heritage and Libraries



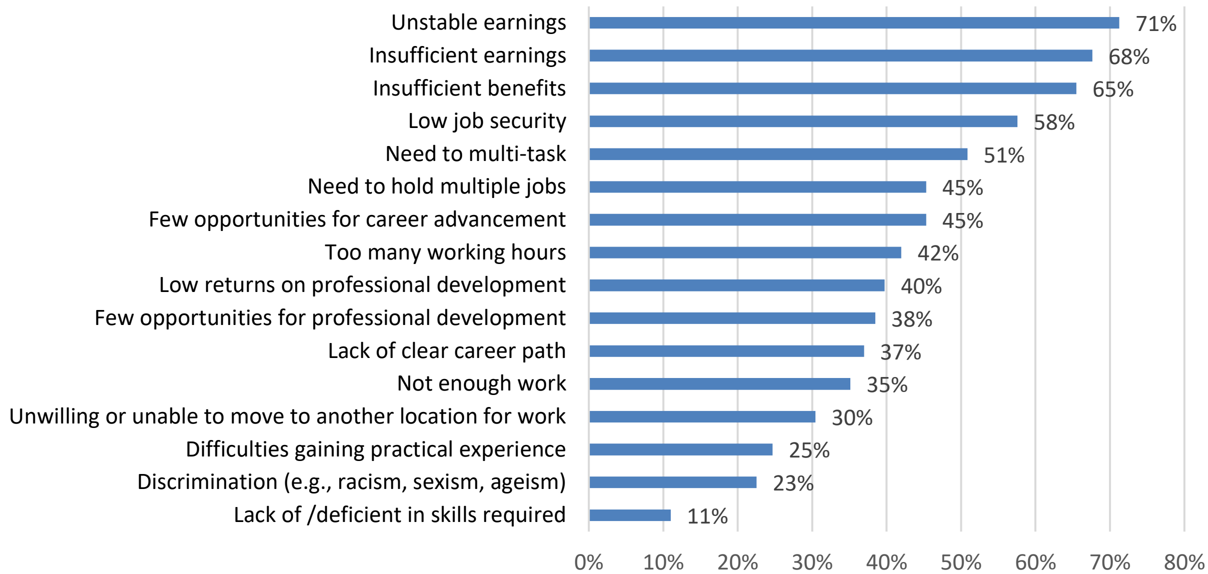

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

## Chart 7.2.1C: Job Challenges: Live Performance



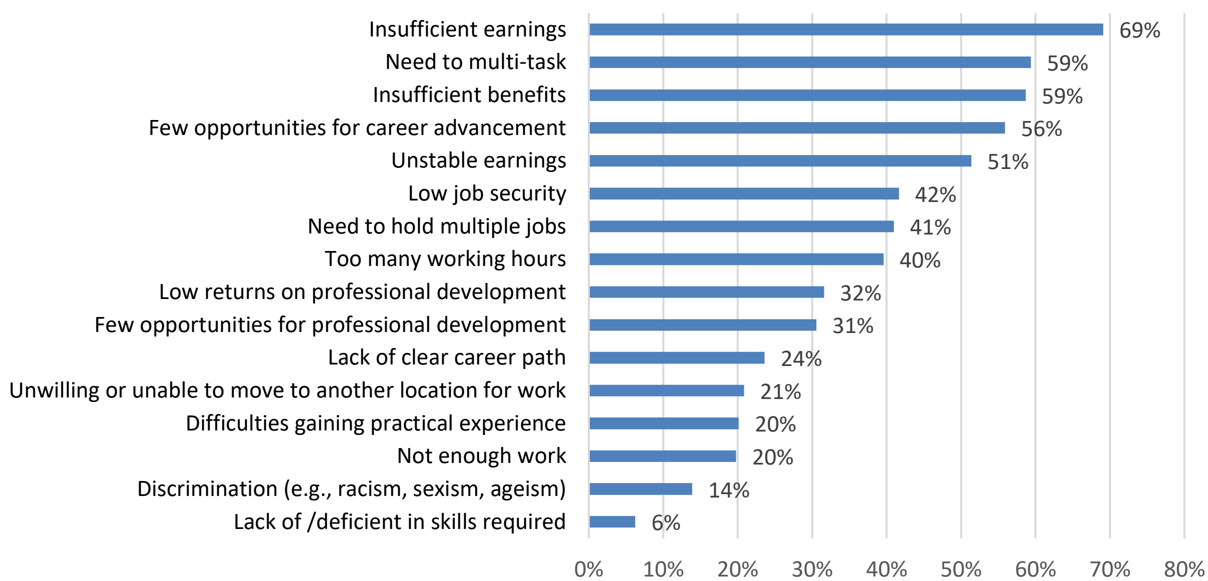

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

## Chart 7.2.1D: Job Challenges: Visual and Applied Arts



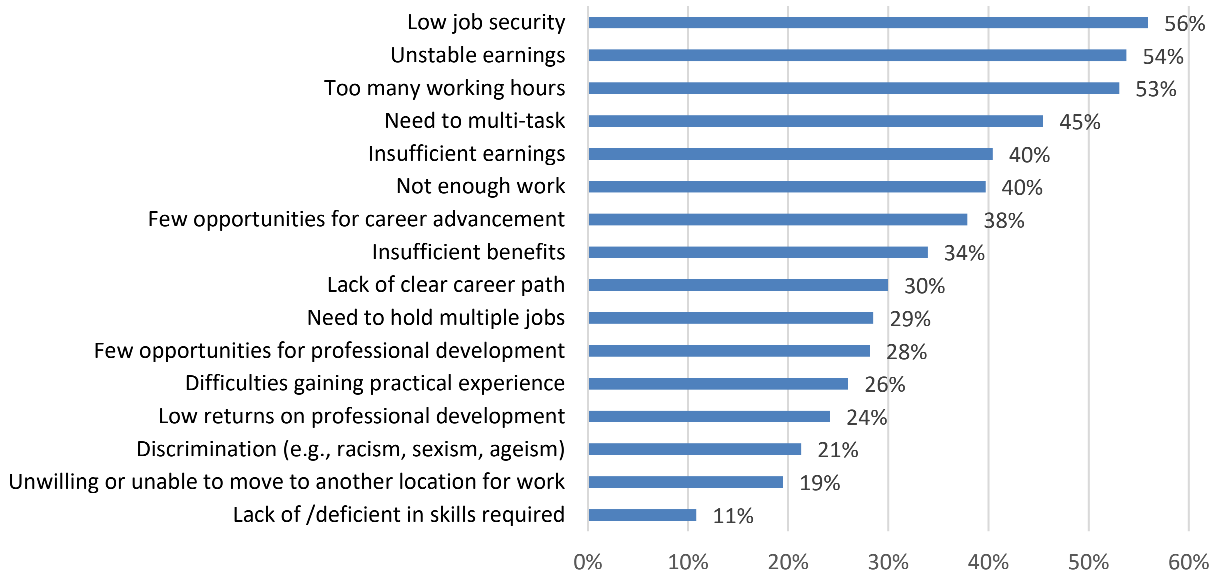

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

## Chart 7.2.1E: Job Challenges: Written and Published Works




Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

### Chart 7.2.1F: Job Challenges: Audio-Visual and Interactive Media




Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

### Chart 7.2.1G: Job Challenges: Sound Recording

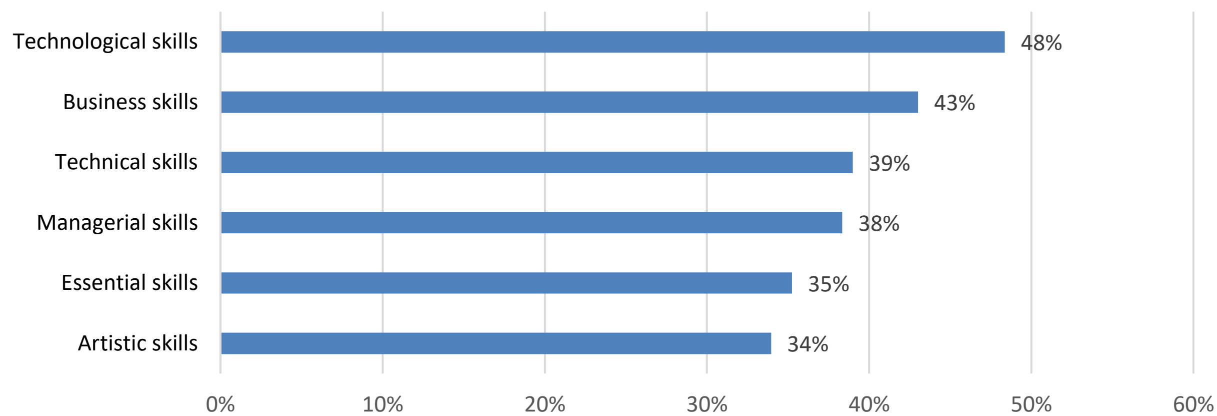

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

## Skill Gaps and Training

Another focal point of the cultural labour market information individual survey was to probe which skills are crucial for cultural workers to maintain competitiveness in their workplace. The survey results show that the skills related to the use of technology, such as new software and new media, are the most needed skills, cited by close to 48 per cent of respondents. Workers in heritage and libraries, sound recording, and visual and applied arts indicated a higher degree of deficiency in terms of technological skills, underscoring the drastic ongoing digital transformation in these domains. Indeed, digitization is crucial for the products of these domains to reach a broader audience, as well as to help improve internal efficiency and productivity. While younger workers in these domains are usually exposed to new technology early on in school, more seasoned workers face bigger challenges adapting to the new technologies.

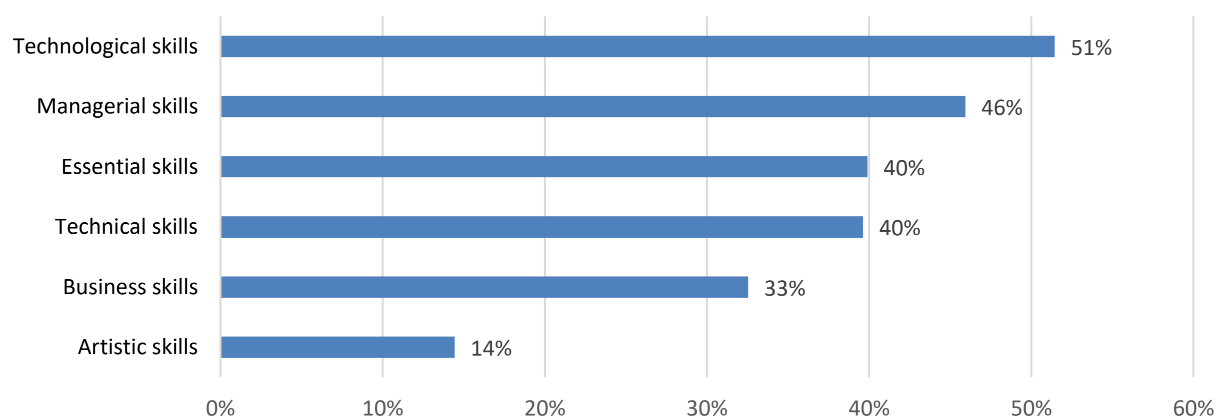
Meanwhile, the need to develop business skills is widely recognized sector-wide, particularly in domains that feature higher self-employment such as visual and applied arts and written and published works, as self-employed individuals need to balance both the creative artistic production and tasks related to running their own business, including marketing, sales, and accounting.

**Chart 7.2.1H: Skill Gaps: Cultural Sector**



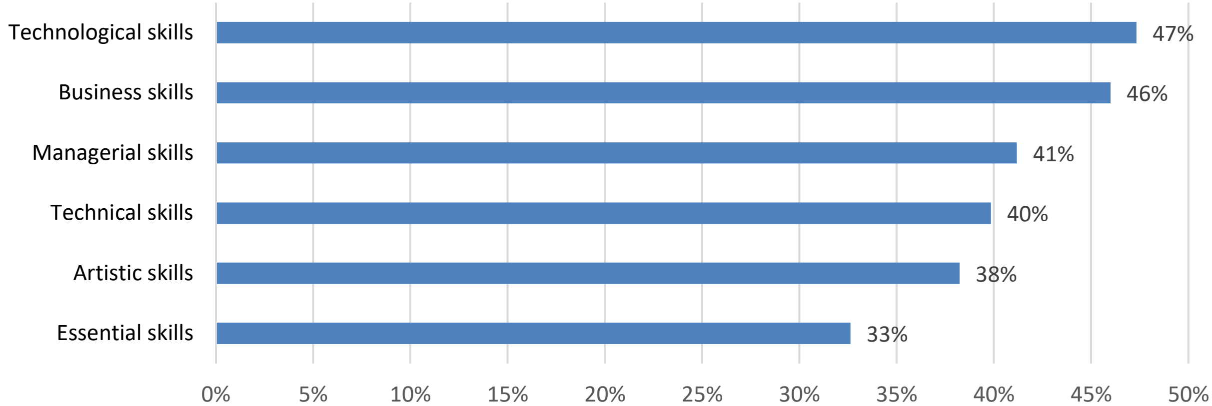

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

**Chart 7.2.1I: Skill Gaps: Heritage and Libraries**



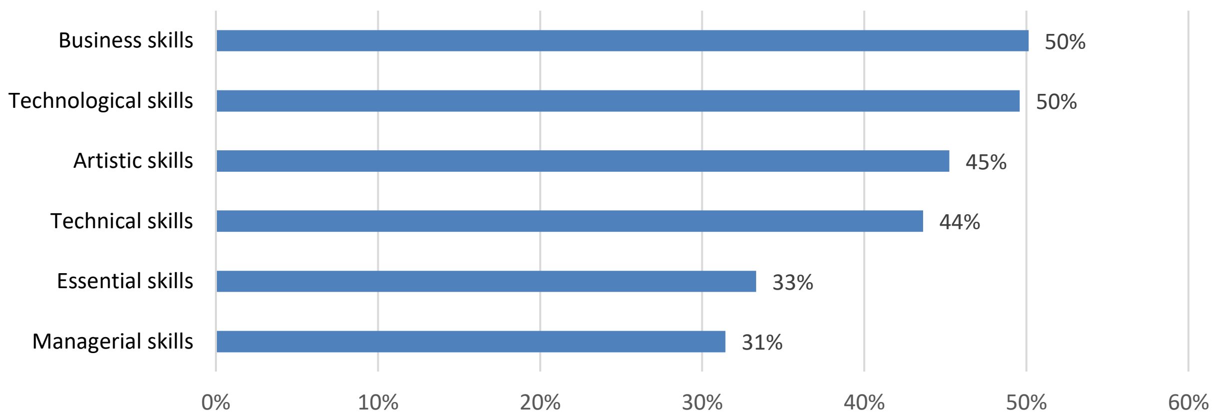

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

### Chart 7.2.1J: Skill Gaps: Live Performance



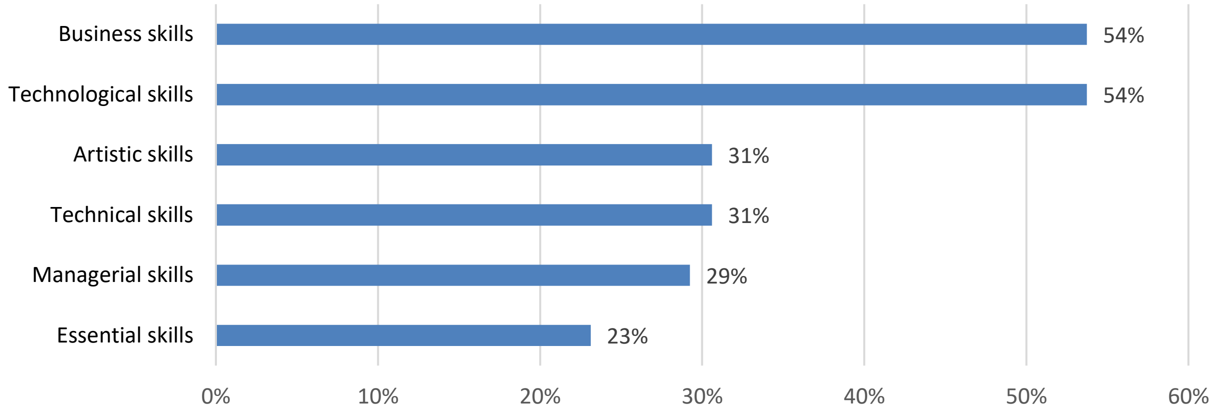

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

### Chart 7.2.1K: Skill Gaps: Visual and Applied Arts



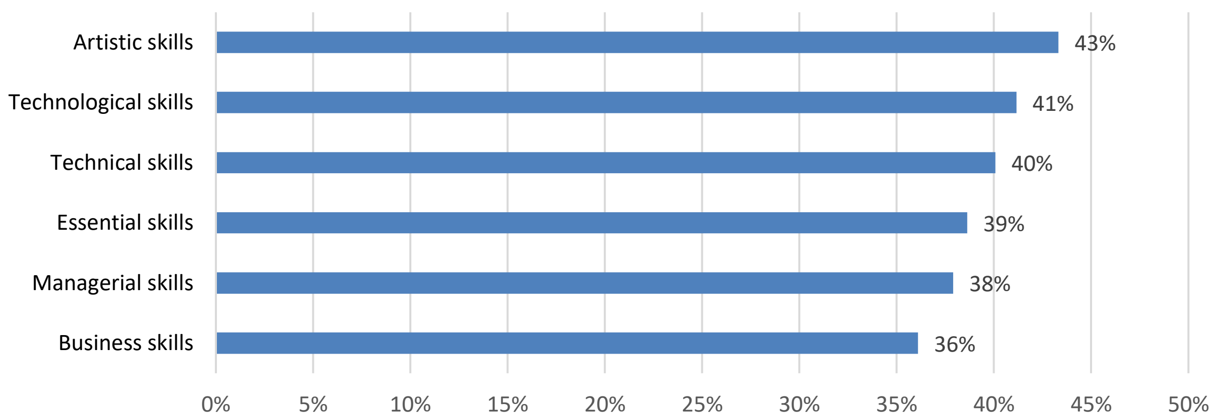

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

## Chart 7.2.1L: Skill Gaps: Written and Published Works



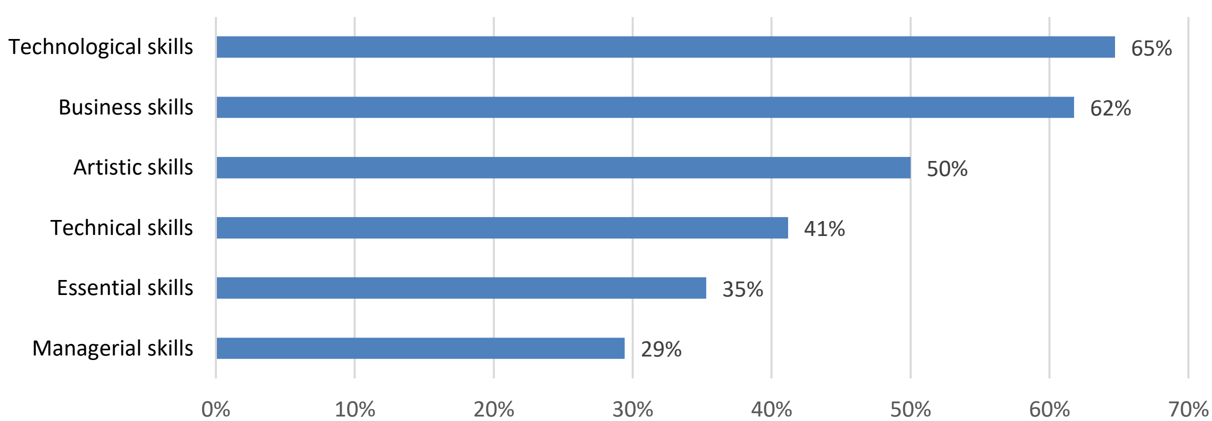

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

## Chart 7.2.1M: Skill Gaps: Audio-Visual and Digital Media




Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

## Chart 7.2.1N: Skill Gaps: Sound Recording



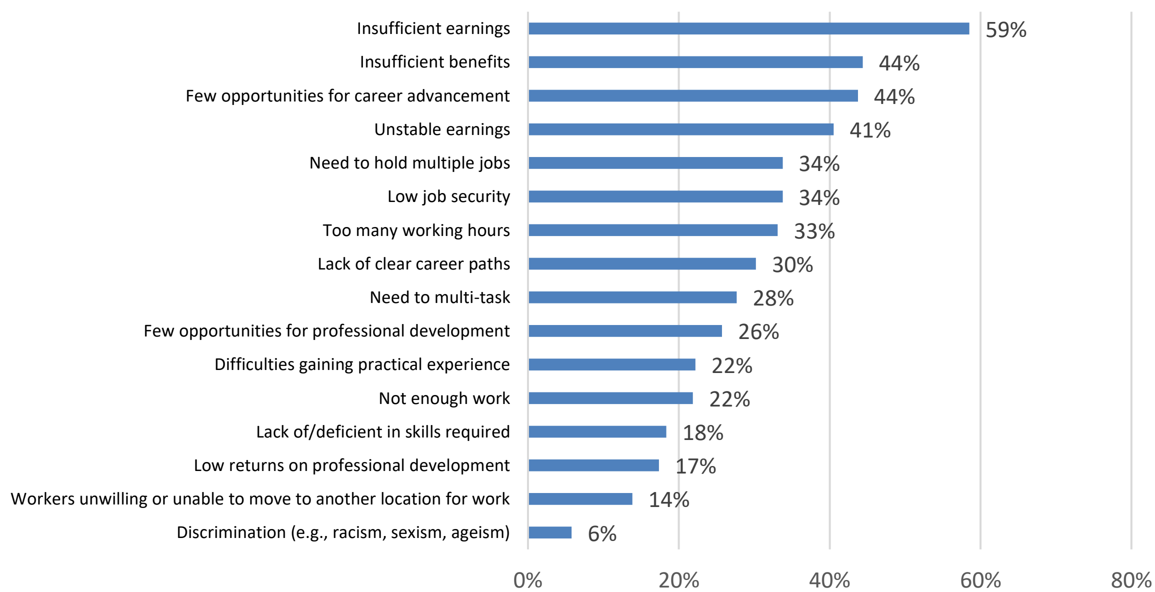

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

## *7.2.2 Survey Results—Cultural Businesses Perspective*

### Most Significant Trends and Issues Affecting Cultural Businesses

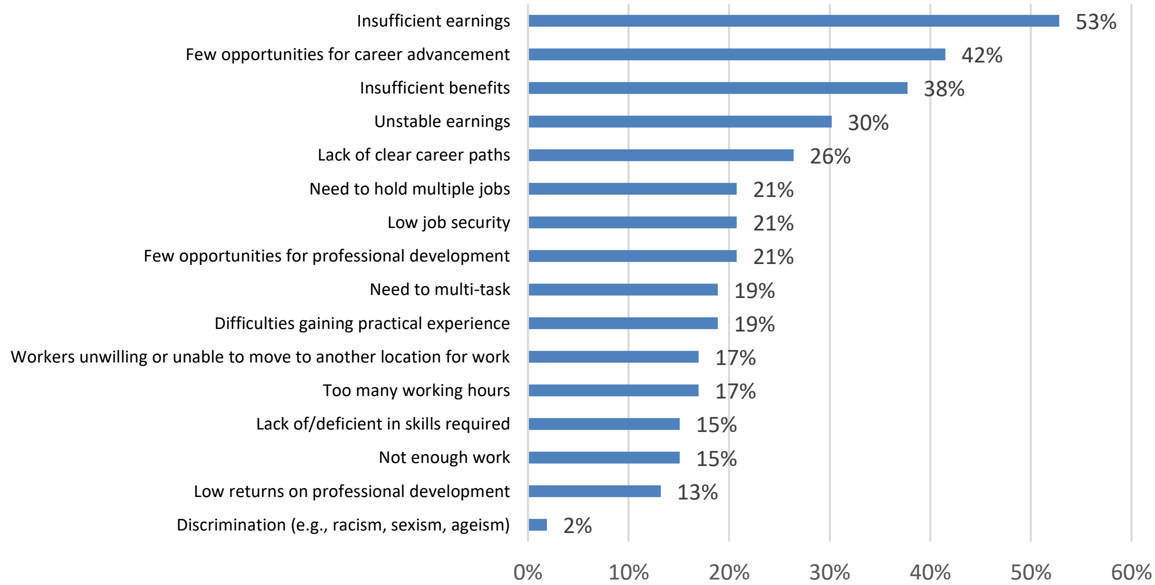
Respondents to the business survey were asked about the most significant challenges facing their business with respect to attracting and retaining qualified workers. The results suggest that, similar to the findings from the individual survey, the most pressing challenges centred on earnings and benefits. Close to 60 per cent of cultural businesses indicated that insufficient earnings in the cultural sector affect their ability to attract and retain skilled workers. Meanwhile, insufficient benefits tied with few opportunities for career advancement as the second most significant challenge: 44 per cent of respondents cited the two as limiting factors for their worker attraction and retention. (See Chart 7.2.2A.)

**Chart 7.2.2A: Challenges in Attracting and Retaining Qualified Workers: Cultural Sector**



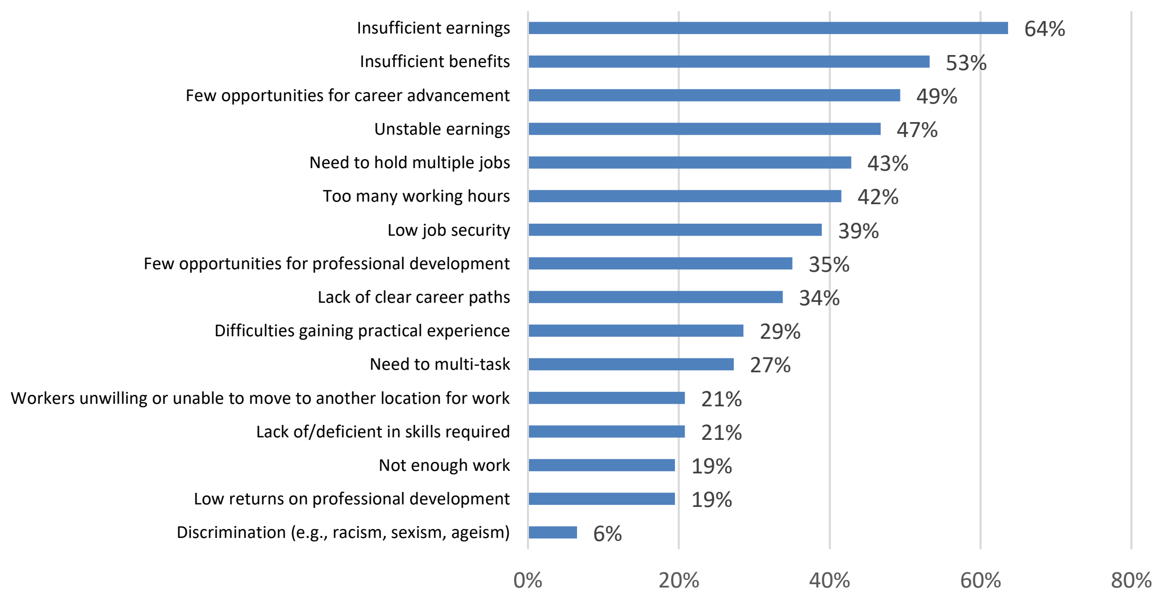

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Employer), 2018–19.

### Chart 7.2.2B: Challenges in Attracting and Retaining Qualified Workers: Heritage and Libraries



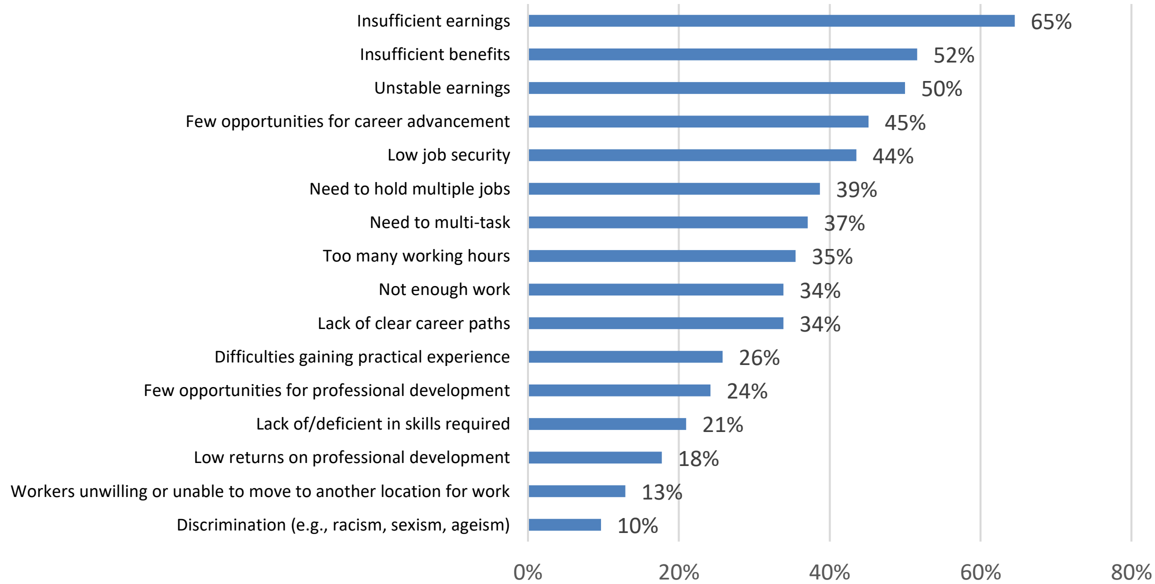

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Employer), 2018–19.

### Chart 7.2.2C: Challenges in Attracting and Retaining Qualified Workers: Live Performance



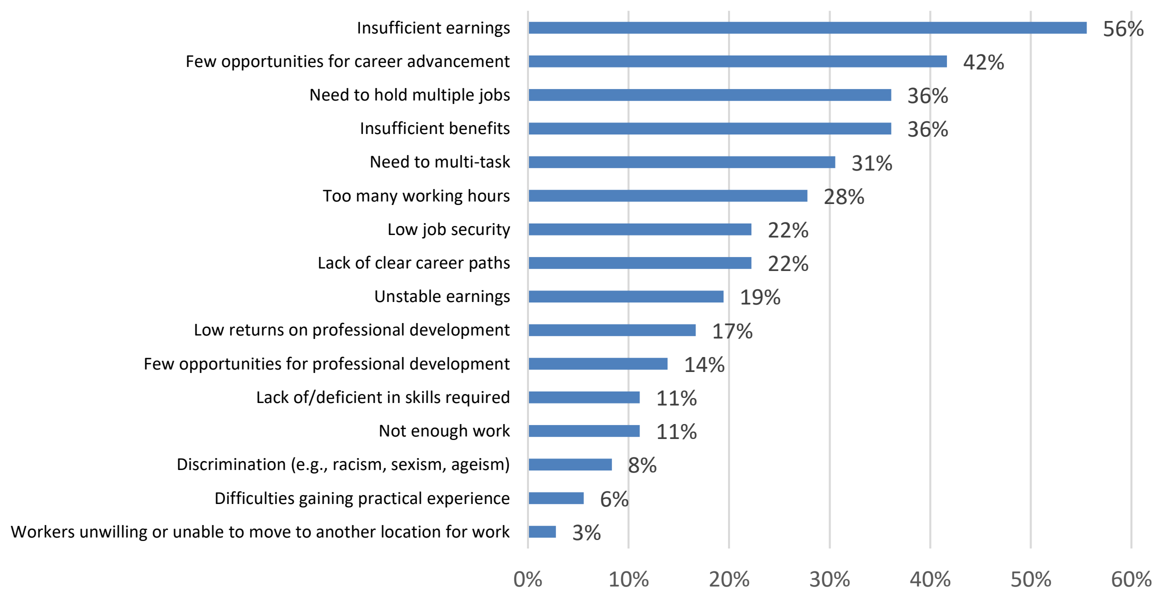

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Employer), 2018–19.

### Chart 7.2.2D: Challenges in Attracting and Retaining Qualified Workers: Visual and Applied Arts



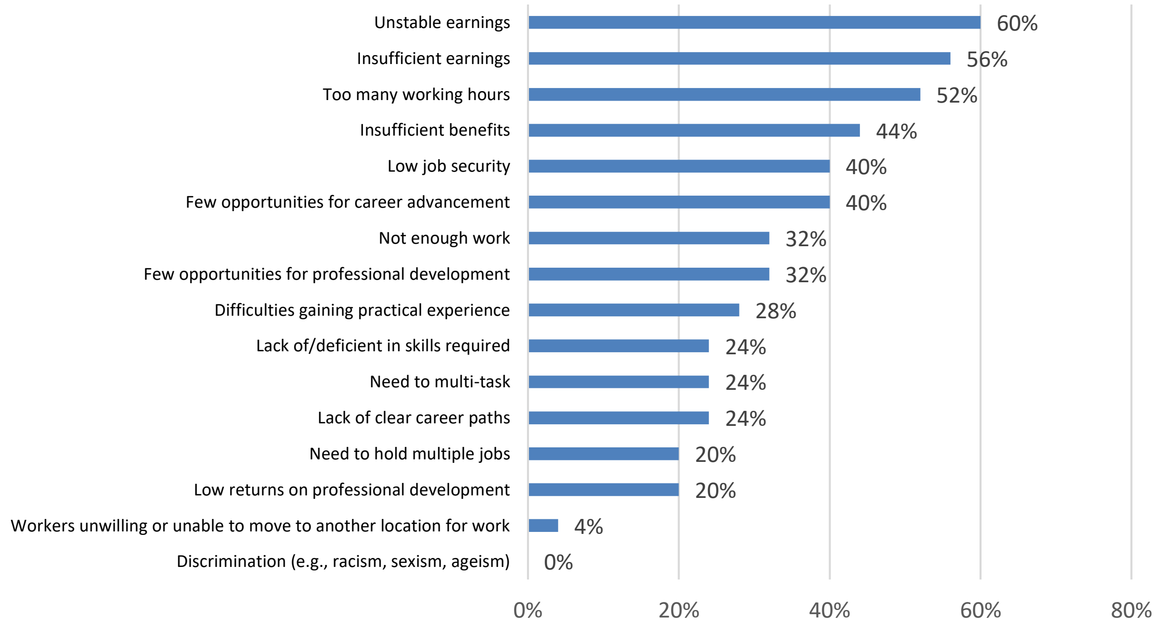

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Employer), 2018–19.

### Chart 7.2.2E: Challenges in Attracting and Retaining Qualified Workers: Written & Published Works



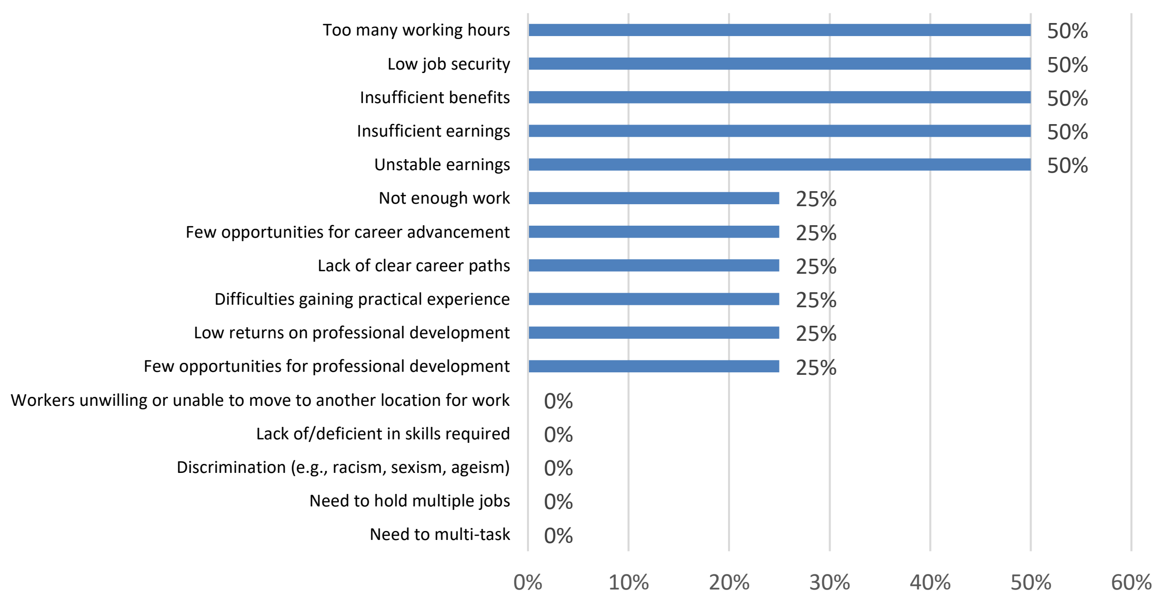

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Employer), 2018–19.

**Chart 7.2.2F: Challenges in Attracting and Retaining Qualified Workers: Audio-Visual & Interactive Media**




Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Employer), 2018–19.

**Chart 7.2.2G: Challenges in Attracting and Retaining Qualified Workers: Sound Recording**




Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Employer), 2018–19.

## *7.3 Interviews with Key Stakeholders*

Canada's cultural sector is thriving, but it is also facing significant challenges. In the interviews we conducted for this study, many interviewees highlighted challenges that apply to the cultural sector as a whole (e.g., its poverty mentality) as well as challenges that apply uniquely to equity-seeking groups (e.g., racism and ableism). The following overview of the interviews breaks the issues and solutions down according to their applicability: sector-wide or equity-seeking.

1. **Issues, trends, realities, and equity-seeking in the sector**

**Sector-wide**:

- Nearly every interviewee mentioned that a "**poverty mentality**" is pervasive in Canada's cultural sector; the poverty mentality manifests itself in **low wages** (offered by organizations, and expected by funders), **lack of benefits** for most employees (e.g., no pension plans, no additional healthcare coverage), and limited interest among Canadians in **paying artists for the full extent of their work** (e.g., people might complain about paying for the preparation an artist has to undertake before a performance). These issues affect all dimensions of an artist's life, including but not limited to **income and food insecurity**, their ability to **access affordable housing**, and their **physical and mental well-being**.
- The **lack of training** for cultural sector management across the country contributes to some of the sector's challenges around budgeting, fundraising, project and event planning, and succession planning.
- The **high cost of office space and performance venues** remains a significant challenge for many organizations and performers in the cultural sector.
- The **effects of emerging technologies**—e.g., replacing or reshaping jobs, changing how the cultural sector shares its products and services, and allowing for new forms of experimentation that cannot yet secure funding—came up in several interviews.
- There are challenges around **rural and remote vs. urban participation in the cultural sector**, including the lack of access to appropriate infrastructure, lack of support (financial and otherwise), lack of access to talent (e.g., it's more difficult and expensive to get a full orchestra together in rural Manitoba than in Toronto).
- **Volunteers are often attracted to larger organizations**, leaving smaller organizations that are already under-resourced with a paucity of support volunteers.
- In not-for-profit organizations, **interactions between an organization's staff and its board can create tension**, especially if roles are not well-defined; the Media Arts Network of Ontario (MANO) commissioned research on this very topic.[46]

**Equity-seeking:**

- There is a real **lack of training** that is sensitive to specific equity-seeking groups' needs; for example, there is no formal cultural sector management training for deaf people in Canada.

[46] Media Arts Network of Ontario, "Studies."

Systemic racism also reduces the accessibility of certain training programs for black, Indigenous, and people of colour (BIPOC) cultural sector workers.

- **Lack of affordable housing** hits cultural sector seniors, people with disabilities, and BIPOC artists hardest, creating additional physical and mental well-being challenges.
- **Ageism** remains a serious challenge in Canada's cultural sector; there are significantly fewer roles available for senior artists, who must also grapple with the significant physical challenges that can emerge with age.
- **Ableism** takes many forms in the sector; funders don't recognize the need to provide additional supports for people with disabilities (e.g., hearing or vision loss, use of a wheelchair, mental disabilities) and rarely recognize the value of the unique cultures that have flourished in disabled communities (e.g., funders do not understand Deaf culture). The burden to provide support for artists with diverse abilities is often put on the shoulders of the disabled artists themselves.
- **Racism, sexism, and tokenism** remain real challenges for many workers; these issues become visible in the lack of diversity seen on stages, on bookshelves, in teaching curriculums, at events, on boards, and in organizations. **Many equity-seeking workers are at the forefront of the fight against white nationalism, patriarchy, and settler-colonialism within Canada**—especially because the cultural sector is so public-facing (i.e., harassment can be easier if you have a public profile).
- **Indigenous workers are not hired proportionately**; there is also a high degree of "poaching" of Indigenous staff by settler organizations with equity-seeking requirements, even though this sometimes comes at a significant cost to Indigenous organizations that have invested in training their peers.
- There is a **lack of transparency around "equity-seeking" programs**, who they are benefiting, and what organizations are doing in the long term to ensure equity in the sector; for example, there was a lot of short-term funding allocated for Canada 150 and in response to the Truth and Reconciliation Commission's (TRC's) initial report, but there is limited evidence to suggest that the funding and post-TRC efforts toward decolonization have continued.

**2. Possible solutions and improvements**

**Sector-wide**:

- Several interviewees mentioned that there needs to be **a mindset shift** across Canada; Canadians need to learn to **value the arts, celebrate the country's artists, and support groundbreaking work**. To foster that shift, governmental and cultural sector organizations could emphasize the importance of the cultural sector, invest in training programs, and even consider having a formalized policy commitment to support the cultural sector (e.g., like New Brunswick's cultural renewal policy).
- **Affordable housing** needs to be a priority in cities and town across Canada; partnerships between developers and cultural sector organizations might be one way to ensure cultural sector workers get to access that affordable housing (e.g., see PAL Canada's housing projects).

- The federal government could consider an **income tax adjustment** for people working in the cultural sector; for example, the federal government could allow for an artist's income to be tax-free up to $60,000.
- The sector should consider **new economic models**; members of the cultural sector should look to the private sector and ask, "what can we learn from their practices?"
- **Ally training** and **frank dialogue about sexism, ableism, racism, and tokenism** should be more commonplace; this training and dialogue would help the sector support its diverse workers more fully.
- The sector could consider **moving away from using the "equity-seeking" label**, which is a bit antiquated and encourages a flattening of diversity with BIPOC, disabled, linguistic minority, and senior communities.
- The sector could **adopt an ethos of care**, where it values its employees, their livelihoods, their mental and physical well-being, and their future career development.

**Equity-seeking:**

- Interviewees said **mentorship programs** for equity-seeking workers should be funded or otherwise supported; these programs would be helpful for building artistic capacity and opening up new collaboration opportunities. These programs could be between equity-seeking and non-equity-seeking workers, or just among equity-seeking workers.
- **Ally training for funders** should be mandatory so that they more clearly understand the equity-seeking groups they wish to serve; they should learn about Deaf culture, the importance of going beyond cookie-cutter land acknowledgment statements,[47] and the interests of communities not currently being served, among many other topics.
- Funders and organizations should **pay for interpreters**, **invest in wheelchair accessible infrastructure**, and support the unique needs of other ageing and disabled cultural sector workers.
- Funders could **demonstrate their equity commitments more clearly** (e.g., by releasing open data about where their funds are going); if they have made an equity commitment, do their funding and/or hiring practices reflect a true commitment to equity?
- Organizations need to **hire more BIPOC, disabled, and senior cultural sector workers;** they need to work to understand that not all BIPOC, disabled, linguistic minority, and senior workers are the same. There is diversity within equity-seeking communities.
- Organizations should **reduce the barriers for receiving funding**, such as requiring previous successes at securing funding, needing to exist for a certain period of time, not supporting certain types of projects, etc.
- Organizations should **embrace reciprocity**; they should work to establish reciprocal agreements with their staff, contractors, and peer organizations and build care and collaboration into their ethos.

[47] Maga, "How Can Theatre Companies Get Indigenous Land Acknowledgements Right?"

# 8. Forecast of Labour Supply and Demand for Cultural Occupations

This chapter provides insights into not only how the sector has recently performed but also where the sector might be headed. The main intent of labour market projections is to map out the likely future path of employment and occupations given the current state of information. Projections can provide valuable insights about how economic and demographic forces are shaping the labour market and the ensuing impact on certain industries and occupations. Indeed, factors such as demography, technological change, economic growth, globalization, and consumer behaviour can all heavily influence the outcome for labour market. The number and types of jobs in tomorrow’s economy will largely depend on these factors.

Labour market projections can help participants in the labour market by providing valuable insight as to where the jobs are potentially going to be. Individuals can use this information to make informed career choices, educational institutions can align their curricula with the demand, and governments can benefit with respect to their own hiring needs as well as by setting appropriate policies and spending priorities. Meanwhile, businesses can look for opportunities that will help maximize their returns by investing in areas where the skills they require are plentiful. Labour market projections can be instrumental in smoothing out the impact of cyclical and structural changes and mitigating the social and economic costs of higher unemployment.

The value of efficient labour markets to an economy cannot be understated. A well-functioning labour market can generate prosperity for an economy, leading to high levels of output and income. On the other hand, inefficiencies can be costly to an economy and the welfare of its participants, leading to lost output, higher unemployment, and lost income.

## 8.1 Recent Performance of the Cultural Sector

The forecasts of labour supply and demand for the cultural sector need to consider, and build upon, the recent performance of the sector as reported by Statistics Canada's Culture Satellite Account. Accounting for inflation, it is estimated that real revenues or the sector increased from $97.7 billion in 2012 to $105.7 billion in 2017 (2012 dollars). This 8.2 per cent growth in real revenues over this period resulted in boosting the real GDP of the sector by nearly 8 per cent (7.9 per cent). While the growth in GDP was slightly lower than the growth of the economy overall (10.3 per cent), the performance among the various domains (and subdomains) of the sector was varied. Overall, the strongest growth at the domain level was within the heritage and libraries, live performance, visual and applied arts, and sound recording domains.

While the growth in real GDP of the cultural sector lagged slightly behind that of the overall economy between 2012 and 2017, growth in employment (7.7 per cent) exceeded the growth in the overall economy (5.6 per cent) during that period. Overall, the strongest growth in employment at the domain level was within the heritage and libraries, live performance, sound recording, and audio-visual and interactive media domains.

In large part, some of the benefits associated with strong employment growth in the sector were the result of relatively weak productivity growth. Using a simple formula of output (revenues) per job, it is perhaps not that surprisingly to find productivity growth in the predominantly services sector–based cultural sector lags significantly behind that of the overall economy. In fact, between 2012 and 2017 the average annual growth in productivity (0.1 per cent) was significantly behind the average annual 1.5 per cent growth in the overall economy. (See Table 8.1.1.)

**Table 8.1.1: Recent Productivity Performance of Cultural Sector (productivity = revenues in 2012 $ 000s per job)**

| Domains | Subdomains | Productivity, 2012 | Productivity, 2017 | Average annual productivity growth |
|---|---|---|---|---|
| **Cultural sector, all products and services** | | 147 | 148 | 0.1% |
| **Culture products and services only** | | 142 | 141 | -0.2% |
| **Heritage and libraries** | Total | 80 | 76 | -1.1% |
| | Archives | 133 | 110 | -3.8% |
| | Libraries | 180 | 143 | -4.5% |
| | Cultural heritage | 79 | 75 | -0.9% |
| | Natural heritage | 72 | 69 | -0.9% |
| **Live performance** | Total | 72 | 71 | -0.3% |
| | Performing arts | 72 | 71 | -0.3% |
| | Festivals and celebrations | 75 | 73 | -0.6% |
| **Visual and applied arts** | Total | 111 | 120 | 1.5% |
| | Original visual art | 61 | 66 | 1.6% |
| | Art reproductions | 79 | 82 | 1.0% |
| | Photography | 117 | 122 | 0.9% |
| | Crafts | 186 | 155 | -3.6% |
| | Advertising | 111 | 117 | 1.0% |
| | Architecture | 154 | 146 | -1.0% |
| | Design | 96 | 117 | 4.0% |
| **Written and published works** | Total | 151 | 146 | -0.7% |
| | Books | 204 | 165 | -4.1% |
| | Periodicals | 199 | 171 | -3.0% |
| | Newspapers | 162 | 134 | -3.7% |
| | Other published works | 192 | 173 | -2.0% |
| | Collected Information | 199 | 171 | -3.0% |
| | Multi-subdomain | 127 | 142 | 2.2% |
| **Audio-visual and interactive media** | Total | 216 | 217 | 0.0% |
| | Film and video | 160 | 156 | -0.6% |
| | Broadcasting | 320 | 361 | 2.4% |
| | Interactive media | 152 | 170 | 2.3% |
| **Sound recording** | Total | 151 | 143 | -1.1% |
| | Sound recording | 100 | 102 | 0.4% |
| | Music publishing | 168 | 155 | -1.6% |
| **Education and training** | | 90 | 87 | -0.8% |
| **Governance, funding, and professional support** | | 151 | 155 | 0.6% |
| **Multidomain*** | | 241 | 200 | -3.7% |
| **Other products and services** | | 171 | 178 | 0.7% |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain

Sources: The Conference Board of Canada; Statistics Canada, Provincial and Territorial Culture Indicators (2017).

## 8.2 Projected Future Performance of the Cultural Sector

Our projection estimates that the potential revenues of cultural industries in Canada could rise from $105.7 billion in 2017 to over $123.1 billion by 2026 (using inflation-adjusted 2012 dollars). (See Table 8.2.1.)

**Table 8.2.1: Projected Potential Revenues of the Cultural Sector (revenues, 2012 $ millions)**

| Domains | Subdomains | 2017 | 2026 | 2017–2026 growth |
|---|---|---|---|---|
| **Cultural sector, all products and services** | | 105,721 | 123,145 | 16.5% |
| **Culture products and services only** | | 81,752 | 95,640 | 17.0% |
| **Heritage and libraries** | Total | 1,188 | 1,369 | 15.2% |
| | Archives | 17 | 20 | 23.2% |
| | Libraries | 75 | 101 | 34.9% |
| | Cultural heritage | 741 | 808 | 9.0% |
| | Natural heritage | 355 | 440 | 23.8% |
| **Live performance** | Total | 4,244 | 5,015 | 18.2% |
| | Performing arts | 3,964 | 4,713 | 18.9% |
| | Festivals and celebrations | 280 | 302 | 8.0% |
| **Visual and applied arts** | Total | 13,966 | 17,261 | 23.6% |
| | Original visual art | 385 | 493 | 28.2% |
| | Art reproductions | 79 | 94 | 18.0% |
| | Photography | 1,200 | 1,226 | 2.1% |
| | Crafts | 698 | 708 | 1.3% |
| | Advertising | 3,301 | 4,256 | 28.9% |
| | Architecture | 2,106 | 1,840 | -12.6% |
| | Design | 6,197 | 8,645 | 39.5% |
| **Written and published works** | Total | 14,895 | 16,040 | 7.7% |
| | Books | 1,388 | 1,220 | -12.1% |
| | Periodicals | 1,802 | 1,632 | -9.4% |
| | Newspapers | 2,839 | 1,850 | -34.8% |
| | Other published works | 190 | 209 | 9.9% |
| | Collected Information | 368 | 344 | -6.6% |
| | Multi-subdomain | 8,308 | 10,784 | 29.8% |
| **Audio-visual and interactive media** | Total | 27,716 | 32,608 | 17.7% |
| | Film and video | 10,311 | 12,411 | 20.4% |
| | Broadcasting | 13,065 | 14,529 | 11.2% |
| | Interactive media | 4,340 | 5,669 | 30.6% |
| **Sound recording** | Total | 1,184 | 1,425 | 20.4% |
| | Sound recording | 193 | 211 | 9.6% |
| | Music publishing | 991 | 1,214 | 22.5% |
| **Education and training** | | 4,750 | 5,338 | 12.4% |
| **Governance, funding, and professional support** | | 13,804 | 15,198 | 10.1% |
| **Multidomain*** | | 1,189 | 1,385 | 16.5% |
| **Other products and services** | | 23,969 | 27,505 | 14.8% |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain

Sources: The Conference Board of Canada; Statistics Canada, Provincial and Territorial Culture Indicators (2017).

This 16.5 per cent projected growth in revenues over this period is expected to boost the real GDP contribution of the sector by over 15 per cent (15.4 per cent) by 2026. (See Table 8.2.2.) This growth is projected to nearly match that of the economy overall (16.1 per cent). Overall, the strongest growth at the domain level is projected in the visual and applied arts, audio-visual and interactive media, and sound recording domains.

### Table 8.2.2: Projected Potential GDP of the Cultural Sector (GDP, 2012 $ millions)

| Domains | Subdomains | 2017 | 2026 | 2017–2026 growth |
|---|---|---|---|---|
| **Cultural sector, all products and services** | | 52,727 | 60,856 | 15.4% |
| **Culture products and services only** | | 40,080 | 46,474 | 16.0% |
| **Heritage and libraries** | Total | 524 | 599 | 14.4% |
| | Archives | 8 | 13 | 75.0% |
| | Libraries | 34 | 67 | 99.2% |
| | Cultural heritage | 322 | 339 | 5.4% |
| | Natural heritage | 161 | 179 | 11.6% |
| **Live performance** | Total | 1,985 | 2,150 | 8.3% |
| | Performing arts | 1,854 | 2,011 | 8.5% |
| | Festivals and celebrations | 131 | 139 | 6.2% |
| **Visual and applied arts** | Total | 7,256 | 9,174 | 26.4% |
| | Original visual art | 181 | 193 | 6.6% |
| | Art reproductions | 36 | 36 | 2.5% |
| | Photography | 569 | 560 | -1.5% |
| | Crafts | 240 | 281 | 17.2% |
| | Advertising | 1,750 | 2,172 | 24.1% |
| | Architecture | 1,347 | 1,359 | 0.8% |
| | Design | 3,132 | 4,572 | 46.0% |
| **Written and published works** | Total | 7,437 | 7,504 | 0.9% |
| | Books | 695 | 628 | -9.6% |
| | Periodicals | 895 | 745 | -16.7% |
| | Newspapers | 1,827 | 1,434 | -21.5% |
| | Other published works | 95 | 112 | 17.6% |
| | Collected Information | 183 | 173 | -5.8% |
| | Multi-subdomain | 3,742 | 4,413 | 17.9% |
| **Audio-visual and interactive media** | Total | 11,531 | 13,521 | 17.3% |
| | Film and video | 3,039 | 3,134 | 3.1% |
| | Broadcasting | 6,010 | 6,791 | 13.0% |
| | Interactive media | 2,482 | 3,595 | 44.8% |
| **Sound recording** | Total | 439 | 508 | 15.7% |
| | Sound recording | 77 | 80 | 3.8% |
| | Music publishing | 362 | 428 | 18.3% |
| **Education and training** | | 3,360 | 3,843 | 14.4% |
| **Governance, funding, and professional support** | | 7,338 | 8,335 | 13.6% |
| **Multidomain*** | | 650 | 840 | 29.2% |
| **Other products and services** | | 12,647 | 14,382 | 13.7% |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain

Sources: The Conference Board of Canada; Statistics Canada, Provincial and Territorial Culture Indicators (2017).

To estimate the growth in employment for the sector going forward, estimates of labour productivity need to be established. These projections not only consider the recent performance of each domain and subdomain but also incorporate the potential impact that tighter labour markets will have on productivity going forward. Meanwhile, continued advancements in technology and evolving changes in consumption patterns and processes will affect the demand for labour by exerting additional pressure on labour productivity. As a result of the collective influences, between 2017 and 2026, the average annual growth in productivity in the sector is projected to advance 0.9 per cent. (See Table 8.2.3.) While this is still projected to lag the overall economy (1.1 per cent), the gap is projected to narrow significantly.

**Table 8.2.3: Projected Potential Productivity Performance of the Cultural Sector (productivity = revenues in 2012 $ 000s per job)**

| Domains | Subdomains | Productivity, 2017 | Productivity, 2026 | Average annual productivity growth |
|---|---|---|---|---|
| **Cultural sector, all products and services** | | 148 | 160 | 0.9% |
| **Culture products and services only** | | 141 | 153 | 0.9% |
| **Heritage and libraries** | Total | 76 | 74 | -0.2% |
| | Archives | 110 | 114 | 0.4% |
| | Libraries | 143 | 150 | 0.5% |
| | Cultural heritage | 75 | 72 | -0.5% |
| | Natural heritage | 69 | 70 | 0.2% |
| **Live performance** | Total | 71 | 73 | 0.4% |
| | Performing arts | 71 | 73 | 0.4% |
| | Festivals and celebrations | 73 | 72 | -0.3% |
| **Visual and applied arts** | Total | 120 | 139 | 1.7% |
| | Original visual art | 66 | 77 | 1.7% |
| | Art reproductions | 82 | 93 | 1.3% |
| | Photography | 122 | 136 | 1.2% |
| | Crafts | 155 | 154 | -0.1% |
| | Advertising | 117 | 138 | 1.9% |
| | Architecture | 146 | 126 | -1.7% |
| | Design | 117 | 151 | 2.9% |
| **Written and published works** | Total | 146 | 162 | 1.2% |
| | Books | 165 | 152 | -0.9% |
| | Periodicals | 171 | 169 | -0.1% |
| | Newspapers | 134 | 110 | -2.2% |
| | Other published works | 173 | 184 | 0.7% |
| | Collected Information | 171 | 162 | -0.6% |
| | Multi-subdomain | 142 | 177 | 2.5% |
| **Audio-visual and interactive media** | Total | 217 | 222 | 0.3% |
| | Film and video | 156 | 148 | -0.6% |
| | Broadcasting | 361 | 457 | 2.7% |
| | Interactive media | 170 | 185 | 0.9% |
| **Sound recording** | Total | 143 | 157 | 1.1% |
| | Sound recording | 102 | 112 | 1.0% |
| | Music publishing | 155 | 169 | 1.0% |
| **Education and training** | | 87 | 88 | 0.2% |
| **Governance, funding, and professional support** | | 155 | 164 | 0.6% |
| **Multidomain*** | | 200 | 199 | -0.1% |
| **Other products and services** | | 178 | 189 | 0.7% |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain

Sources: The Conference Board of Canada; Statistics Canada, *Provincial and Territorial Culture Indicators (2017)*.

Overall, combining the projected growth in revenues with the estimates for labour productivity suggest that employment in the sector will advance by just under 8 per cent (7.7%) by 2026. (See Table 8.2.4.) This growth is projected to be slightly behind that of the economy overall (9.7%) during the period. The strongest growth at the domain level is projected within the heritage and libraries, live performance, audio-visual and interactive media, and sound recording domains.

**Table 8.2.4: Projected Potential Employment of the Cultural Sector (employment, number of jobs)**

| Domains | Subdomains | 2017 | 2026 | 2017-2026 Growth |
|---|---|---|---|---|
| **Cultural sector, all products and services** | | 715,384 | 770,487 | 7.7% |
| **Culture products and services only** | | 580,524 | 624,978 | 7.7% |
| **Heritage and libraries** | Total | 15,682 | 18,402 | 17.3% |
| | Archives | 151 | 180 | 19.0% |
| | Libraries | 522 | 674 | 29.0% |
| | Cultural heritage | 9,824 | 11,242 | 14.4% |
| | Natural heritage | 5,186 | 6,307 | 21.6% |
| **Live performance** | Total | 59,897 | 68,398 | 14.2% |
| | Performing arts | 56,072 | 64,173 | 14.4% |
| | Festivals and celebrations | 3,825 | 4,225 | 10.5% |
| **Visual and applied arts** | Total | 116,834 | 123,759 | 5.9% |
| | Original visual art | 5,870 | 6,438 | 9.7% |
| | Art reproductions | 963 | 1,007 | 4.6% |
| | Photography | 9,824 | 9,039 | -8.0% |
| | Crafts | 4,495 | 4,586 | 2.0% |
| | Advertising | 28,309 | 30,926 | 9.2% |
| | Architecture | 14,379 | 14,625 | 1.7% |
| | Design | 52,993 | 57,136 | 7.8% |
| **Written and published works** | Total | 102,062 | 98,765 | -3.2% |
| | Books | 8,423 | 8,041 | -4.5% |
| | Periodicals | 10,539 | 9,649 | -8.4% |
| | Newspapers | 21,142 | 16,817 | -20.5% |
| | Other published works | 1,096 | 1,134 | 3.5% |
| | Collected Information | 2,156 | 2,127 | -1.3% |
| | Multi-subdomain | 58,706 | 60,997 | 3.9% |
| **Audio-visual and interactive media** | Total | 127,982 | 146,645 | 14.6% |
| | Film and video | 66,284 | 84,135 | 26.9% |
| | Broadcasting | 36,233 | 31,821 | -12.2% |
| | Interactive media | 25,464 | 30,689 | 20.5% |
| **Sound recording** | Total | 8,285 | 9,061 | 9.4% |
| | Sound recording | 1,885 | 1,881 | -0.2% |
| | Music publishing | 6,400 | 7,180 | 12.2% |
| **Education and training** | | 54,710 | 60,338 | 10.3% |
| **Governance, funding, and professional support** | | 89,139 | 92,634 | 3.9% |
| **Multidomain*** | | 5,933 | 6,975 | 17.6% |
| **Other products and services** | | 134,860 | 145,509 | 7.9% |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain

Sources: The Conference Board of Canada; Statistics Canada, *Provincial and Territorial Culture Indicators (2017)*.

## *8.3 Examining Labour Supply and Demand Dynamics in the Cultural Sector*

To understand if and how labour dynamics for the cultural sector may change going forward and potentially limit the growth of the sector, it is important to first understand the current situation. In many respects, the cultural sector is unique, particularly because of the prevalence of self-employment.

There are a few distinct perspectives that could be used to quantitatively convey the current and projected labour market situation for the sector. One perspective would be to focus on the industry classifications that are deemed to be part of the cultural sector. The challenge is that forecasting the degree to which labour challenges may affect future performance (and may already affect the performance) is complicated due to the fact that many of the jobs within the sector are not cultural occupations. Hence, for non-cultural occupations, the primary drivers of both demand and supply for those positions are likely to be outside of the cultural sector. Unfortunately, at the present time, the level and composition of these jobs is unknown**. Hence, one of the recommendations going forward is to consider the development of a human resource module for the Culture Satellite Account.**

Another perspective would be to examine the labour market situation focusing solely on those occupations that are identified as cultural under the National Occupation Classification (NOC). The challenge here too is that forecasting the demand for these occupations requires an understanding of the degree to which workers in these jobs work outside the cultural sector. Unfortunately, the degree to which workers in cultural occupations work outside (or even inside) the cultural sector is unknown. A further benefit of a human resource module for the Culture Satellite Account would be to fill in some of these gaps in understanding.

A hybrid approach (used in this report) associates the specific cultural occupational projections with the cultural domain and subdomain projections that are deemed to be most relevant. To do this, however, requires the use of the most recent occupational framework assigned to the cultural sector. At the present time, this continues to be Statistics Canada’s Classification Guide for the Canadian Framework for Culture Statistics (2011).

Ultimately, the resulting labour supply and demand relationships could then be assumed to reflect the reality within the cultural sector. It should be noted that the levels of both labour supply and labour demand differ from the employment levels revealed in the Culture Satellite Account because the primary lens for comparison is on cultural occupations rather than cultural industries.

The following table shows the employment in the cultural occupations based on Statistics Canada’s 2016 Census. (See Table 8.3.1.) Overall, just under 800,000 individuals were reported to have worked in a cultural occupation during the reference year (2015).

**Table 8.3.1: Cultural Occupations (employment, number of jobs)**

| Domains | Subdomains | 2015 |
|---|---|---|
| **Cultural occupations, total** | | 798,305 |
| **Heritage and libraries** | Total | 84,480 |
| | Archivists | 2,060 |
| | Records management and filing clerks | 7,780 |
| | Librarians | 9,835 |
| | Supervisors, library, correspondence, and related information clerks | 4,850 |
| | Library clerks | 19,075 |
| | Conservators and curators | 2,175 |
| | Technical support occupations related to museums and art galleries | 9,070 |
| | Conservation and fishery officers | 5,440 |
| | Biological technologists and technicians | 11,160 |
| | Forestry technologists and technicians | 7,780 |
| | Library, archive, museum, and art gallery managers | 5,255 |
| **Live performance** | Total | 133,000 |
| | Producers, directors, choreographers, and related occupations | 29,075 |
| | Musicians and singers | 40,295 |
| | Dancers | 11,700 |
| | Actors and comedians | 15,995 |
| | Other performers | 8,395 |
| | Conference and event planners | 27,540 |
| **Visual and applied arts** | Total | 355,160 |
| | Painters, sculptors, and other visual artists | 24,785 |
| | Photographers | 21,030 |
| | Photographic and film processors | 2,725 |
| | Artisans and craftspersons | 17,285 |
| | Professional occupations in advertising, marketing, and public relations | 23,570 |
| | Architects | 18,080 |
| | Landscape architects | 2,215 |
| | Urban and land use planners | 13,205 |
| | Architecture and science managers | 9,295 |
| | Landscape and horticultural technicians and specialists | 21,290 |
| | Architectural technologists and technicians | 11,325 |
| | Drafting technologists and technicians | 29,755 |
| | Web designers and developers | 29,020 |
| | Industrial designers | 9,695 |
| | Graphic designers and illustrators | 66,875 |
| | Interior designers | 28,025 |
| | Theatre, fashion, exhibit, and other creative designers | 16,175 |
| | Patternmakers—textile, leather, and fur products | 1,120 |
| | Graphic arts technicians | 9,690 |

| | | |
|---|---|---|
| **Written and published works** | Total | 148,820 |
| | Authors and writers | 31,110 |
| | Editors | 19,170 |
| | Journalists | 13,045 |
| | Translators, terminologists, and interpreters | 19,950 |
| | Desktop publishing operators and related occupations | 1,805 |
| | Supervisors, printing, and related occupations | 3,110 |
| | Printing press operators | 17,825 |
| | Printing machine operators | 7,920 |
| | Camera, platemaking and other pre-press occupations | 2,900 |
| | Binding and finishing machine operators | 5,375 |
| | Correspondence, publication and related clerks | 26,610 |
| **Audio-visual and interactive media** | Total | 22,080 |
| | Film and video camera operators | 5,755 |
| | Announcers and other broadcasters | 6,500 |
| | Senior managers—trade, broadcasting, and other services, not elsewhere classified | 655 |
| | Broadcast technicians | 2,245 |
| | Computer programmers and interactive media developers | 6,925 |
| **Sound recording** | Total | 4,550 |
| | Producers, directors, choreographers, and related occupations & conductors, composers, and arrangers | 4,550 |
| **Multidomain*** | Total | 50,215 |
| | Managers—publishing, motion pictures, broadcasting, and performing arts | 8,185 |
| | Audio and video recording technicians | 14,315 |
| | Other technical support and coordinating occupations in motion pictures, broadcasting, and the performing arts | 15,875 |
| | Support occupations in motion pictures, broadcasting, and the performing arts | 11,840 |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain
Sources: The Conference Board of Canada; Statistics Canada, Provincial and Territorial Culture Indicators (2017).

In the same year (2015), based on data from Statistics Canada's Job Vacancy and Wage Survey, it was reported that just over 12,300 (12,308) positions for cultural occupations were unfilled. (See Table 8.3.2.) This reported level of vacancies represents 1.5 per cent of the overall employment in cultural occupations that year. **Relative to the overall economy in that year (2.9 per cent), cultural occupations exhibited a lower likelihood of being unfilled. In large part, this is due to the fact that a very high percentage of the occupations are filled by self-employed individuals.**

**Table 8.3.2: Vacancies in Cultural Occupations, 2015 (vacancies, number of jobs)**

| Domains | Subdomains | 2015 vacancies | Vacancy rate (%) |
|---|---|---|---|
| **Cultural occupations, Total** | | 12,308 | 1.5% |
| **Heritage and libraries** | Total | 1,198 | 1.4% |
| | Archivists | 12 | 0.6% |
| | Records management and filing clerks | 117 | 1.5% |
| | Librarians | 200 | 2.0% |
| | Supervisors, library, correspondence, and related information clerks | 22 | 0.4% |
| | Library clerks | 240 | 1.3% |
| | Conservators and curators | - | 0.0% |
| | Technical support occupations related to museums and art galleries | 115 | 1.3% |
| | Conservation and fishery officers | 32 | 0.6% |
| | Biological technologists and technicians | 210 | 1.9% |
| | Forestry technologists and technicians | 171 | 2.2% |
| | Library, archive, museum, and art gallery managers | 79 | 1.5% |
| **Live performance** | Total | 864 | 0.6% |
| | Producers, directors, choreographers, and related occupations | 259 | 0.9% |
| | Musicians and singers | - | 0.0% |
| | Dancers | 37 | 0.3% |
| | Actors and comedians | - | 0.0% |
| | Other performers | 46 | 0.5% |
| | Conference and event planners | 522 | 1.9% |
| **Visual and applied arts** | Total | 7,929 | 2.2% |
| | Painters, sculptors, and other visual artists | - | 0.0% |
| | Photographers | - | 0.0% |
| | Photographic and film processors | - | 0.0% |
| | Artisans and craftspersons | - | 0.0% |
| | Professional occupations in advertising, marketing, and public relations | 1,234 | 5.2% |
| | Architects | 210 | 1.2% |
| | Landscape architects | - | 0.0% |
| | Urban and land use planners | 242 | 1.8% |
| | Architecture and science managers | 280 | 3.0% |
| | Landscape and horticultural technicians and specialists | 1,863 | 8.8% |
| | Architectural technologists and technicians | 218 | 1.9% |
| | Drafting technologists and technicians | 717 | 2.4% |
| | Web designers and developers | 955 | 3.3% |
| | Industrial designers | 280 | 2.9% |
| | Graphic designers and illustrators | 1,431 | 2.1% |

| | | | |
|---|---|---|---|
| | Interior designers | 176 | 0.6% |
| | Theatre, fashion, exhibit, and other creative designers | 118 | 0.7% |
| | Patternmakers—textile, leather, and fur products | - | 0.0% |
| | Graphic arts technicians | 205 | 2.1% |
| **Written and published works** | Total | 1,499 | 1.0% |
| | Authors and writers | 386 | 1.2% |
| | Editors | 289 | 1.5% |
| | Journalists | 178 | 1.4% |
| | Translators, terminologists, and interpreters | 56 | 0.3% |
| | Desktop publishing operators and related occupations | - | 0.0% |
| | Supervisors, printing, and related occupations | - | 0.0% |
| | Printing press operators | 221 | 1.2% |
| | Printing machine operators | - | 0.0% |
| | Camera, platemaking and other pre-press occupations | - | 0.0% |
| | Binding and finishing machine operators | 88 | 1.6% |
| | Correspondence, publication and related clerks | 281 | 1.1% |
| **Audio-visual and interactive media** | Total | 392 | 1.8% |
| | Film and video camera operators | 22 | 0.4% |
| | Announcers and other broadcasters | 95 | 1.5% |
| | Senior managers—trade, broadcasting, and other services, not elsewhere classified | 1 | 0.2% |
| | Broadcast technicians | 39 | 1.8% |
| | Computer programmers and interactive media developers | 235 | 3.4% |
| **Sound recording** | Total | - | 0.0% |
| | Producers, directors, choreographers, and related occupations & conductors, composers, and arrangers | - | 0.0% |
| **Multidomain*** | Total | 425 | 0.8% |
| | Managers—publishing, motion pictures, broadcasting, and performing arts | 194 | 2.4% |
| | Audio and video recording technicians | 50 | 0.4% |
| | Other technical support and coordinating occupations in motion pictures, broadcasting, and the performing arts | 124 | 0.8% |
| | Support occupations in motion pictures, broadcasting, and the performing arts | 58 | 0.5% |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain

Sources: The Conference Board of Canada; Statistics Canada, Job Vacancy and Wage Survey (2015).

While vacancies dipped in 2016, according to data from Statistics Canada's Job Vacancy and Wage Survey, vacancies then ramped up to reach nearly 14,600 (14,559) by 2018. (See Table 8.3.3.)

**Table 8.3.3: Vacancies in Cultural Occupations, 2016–2018 (vacancy, number of jobs)**

| Domains | Subdomains | 2016 Vacancies | 2017 Vacancies | 2018 Vacancies |
|---|---|---|---|---|
| **Cultural occupations, total** | | 12,049 | 13,502 | 14,559 |
| **Heritage and libraries** | Total | 1,193 | 1,630 | 1,520 |
| | Archivists | 9 | - | 9 |
| | Records management and filing clerks | 157 | 137 | 172 |
| | Librarians | 123 | 87 | 113 |
| | Supervisors, library, correspondence, and related information clerks | 16 | - | - |
| | Library clerks | 240 | 368 | 271 |
| | Conservators and curators | 18 | - | 48 |
| | Technical support occupations related to museums and art galleries | 157 | 311 | 220 |
| | Conservation and fishery officers | 9 | 77 | - |
| | Biological technologists and technicians | 271 | 470 | 511 |
| | Forestry technologists and technicians | 112 | 127 | 107 |
| | Library, archive, museum, and art gallery managers | 79 | 53 | 69 |
| **Live performance** | Total | 788 | 1,308 | 1,409 |
| | Producers, directors, choreographers, and related occupations | 232 | 279 | 306 |
| | Musicians and singers | - | 85 | 25 |
| | Dancers | - | 83 | 95 |
| | Actors and comedians | - | - | 99 |
| | Other performers | 29 | 80 | 120 |
| | Conference and event planners | 527 | 780 | 764 |
| **Visual and applied arts** | Total | 7,891 | 7,856 | 8,705 |
| | Painters, sculptors, and other visual artists | - | - | 94 |
| | Photographers | 23 | 12 | 18 |
| | Photographic and film processors | 66 | - | 71 |
| | Artisans and craftspersons | - | - | - |
| | Professional occupations in advertising, marketing, and public relations | 1,586 | 1,072 | 1,012 |
| | Architects | 183 | 383 | 487 |
| | Landscape architects | 30 | 35 | 25 |
| | Urban and land use planners | 309 | 276 | 247 |
| | Architecture and science managers | 378 | 233 | 275 |
| | Landscape and horticultural technicians and specialists | 1,395 | 895 | 1,032 |
| | Architectural technologists and technicians | 286 | 291 | 450 |
| | Drafting technologists and technicians | 660 | 886 | 993 |
| | Web designers and developers | 857 | 1,009 | 1,082 |
| | Industrial designers | 155 | 269 | 326 |

| | | | | |
|---|---|---|---|---|
| | Graphic designers and illustrators | 1,160 | 1,284 | 1,405 |
| | Interior designers | 366 | 366 | 499 |
| | Theatre, fashion, exhibit, and other creative designers | 166 | 190 | 215 |
| | Patternmakers—textile, leather, and fur products | - | 11 | - |
| | Graphic arts technicians | 268 | 644 | 473 |
| **Written and published works** | Total | 1,324 | 1,816 | 1,771 |
| | Authors and writers | 344 | 504 | 469 |
| | Editors | 175 | 228 | 175 |
| | Journalists | 108 | 243 | 221 |
| | Translators, terminologists, and interpreters | 148 | 144 | 116 |
| | Desktop publishing operators and related occupations | 26 | 15 | 15 |
| | Supervisors, printing, and related occupations | 14 | 9 | 23 |
| | Printing press operators | 166 | 211 | 166 |
| | Printing machine operators | - | 107 | 138 |
| | Camera, platemaking and other pre-press occupations | - | - | 41 |
| | Binding and finishing machine operators | 134 | 134 | 181 |
| | Correspondence, publication and related clerks | 209 | 220 | 225 |
| **Audio-visual and interactive media** | Total | 408 | 454 | 587 |
| | Film and video camera operators | - | - | 22 |
| | Announcers and other broadcasters | 99 | 107 | 162 |
| | Senior managers—trade, broadcasting, and other services, not elsewhere classified | 1 | 1 | 1 |
| | Broadcast technicians | 18 | - | 7 |
| | Computer programmers and interactive media developers | 290 | 346 | 394 |
| **Sound recording** | Total | - | - | - |
| | Producers, directors, choreographers, and related occupations & conductors, composers, and arrangers | - | - | - |
| **Multidomain*** | Total | 444 | 438 | 567 |
| | Managers—publishing, motion pictures, broadcasting, and performing arts | 226 | 177 | 194 |
| | Audio and video recording technicians | 35 | 18 | 79 |
| | Other technical support and coordinating occupations in motion pictures, broadcasting, and the performing arts | 117 | 184 | 202 |
| | Support occupations in motion pictures, broadcasting, and the performing arts | 67 | 58 | 93 |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain

Sources: The Conference Board of Canada; Statistics Canada, Job Vacancy and Wage Survey (2016–2018).

It should be noted that in any one year, the level of overall demand for cultural occupations may exceed that which is actually met by the economy. The degree to which labour demand may exceed labour supply is assumed to be equal to the number of positions that remain unfilled. Conservatively, this could be reflected by the level of reported vacancies in the Job Vacancy and Wage Survey. It could be argued that this is likely to be conservative, given that not all vacancies will show up using this data source. Statistic Canada's Job Vacancy and Wage Survey reflects only vacancies that have been unfilled for at least one month. In addition, there may be reasons why businesses or individuals do not recruit positions using a formal process.

As these shortages are already creeping up in the cultural sector (and in the overall economy), it will be important to address labour challenges in the sector. Without success in addressing such issues going forward, the cultural sector could face growing difficulties in attracting and retaining employees and individuals—factors that could limit the growth potential of the sector.

Aside from affecting performance in any one year, labour shortages can also affect future investment decisions. Our methodology to estimate the degree to which job vacancies reduce potential investment draws upon insights from the Business Development Bank of Canada's (BDC)'s Investment Intentions Survey (conducted annually since 2015)—in particular, responses to questions on that survey that probe for factors limiting the investment intentions of small businesses in Canada. To establish a relationship, we linked the survey results (specifically, the proportion of small businesses indicating a reduction in investment due to a shortage of qualified employees each year) with the job vacancy rates in each year.

Using 2015 as a reference year—when the shortage represented just the level of vacancies—we can estimate the level of labour demand that exists in any year by adding together the labour supply (observed performance) plus the shortages (as reported by the Job Vacancy and Wage Survey) plus any potential "carry-over" effects from previous years' vacancies. This process can be repeated up to 2018 (the last full year of vacancy data, as reported by the Job Vacancy and Wage Survey). (See Table 8.3.4.) In this table, the overall estimated labour shortage (14,704) is higher than the reported Job Vacancy and Wage Survey vacancies (14,559) for that year (as shown in Table 8.3.3).

**Table 8.3.4: Labour Demand, Supply, and Shortage in Cultural Occupations, 2018 (number of jobs)**

| Domains | Subdomains | 2018 Labour Demand | 2018 Labour Supply | 2018 Shortage |
|---|---|---|---|---|
| **Cultural Occupations, Total** | | 866,159 | 851,456 | 14,704 |
| **Heritage and libraries** | Total | 97,136 | 95,593 | 1,544 |
| | Archivists | 2,305 | 2,296 | 9 |
| | Records management and filing clerks | 8,955 | 8,781 | 174 |
| | Librarians | 11,225 | 11,111 | 114 |
| | Supervisors, library, correspondence, and related information clerks | 5,479 | 5,479 | - |
| | Library clerks | 21,801 | 21,528 | 273 |
| | Conservators and curators | 2,430 | 2,382 | 48 |
| | Technical support occupations related to museums and art galleries | 10,158 | 9,932 | 226 |
| | Conservation and fishery officers | 6,322 | 6,321 | 2 |
| | Biological technologists and technicians | 13,485 | 12,967 | 519 |
| | Forestry technologists and technicians | 9,149 | 9,039 | 109 |
| | Library, archive, museum, and art gallery managers | 5,827 | 5,758 | 70 |
| **Live performance** | Total | 152,650 | 151,234 | 1,416 |
| | Producers, directors, choreographers, and related occupations | 33,742 | 33,435 | 307 |
| | Musicians and singers | 46,363 | 46,338 | 25 |
| | Dancers | 13,550 | 13,455 | 96 |
| | Actors and comedians | 18,492 | 18,394 | 99 |
| | Other performers | 9,775 | 9,654 | 121 |
| | Conference and event planners | 30,728 | 29,960 | 768 |
| **Visual and applied arts** | Total | 389,685 | 380,901 | 8,784 |
| | Painters, sculptors, and other visual artists | 28,131 | 28,037 | 94 |
| | Photographers | 22,062 | 22,045 | 18 |
| | Photographic and film processors | 2,958 | 2,887 | 71 |
| | Artisans and craftspersons | 18,426 | 18,426 | - |
| | Professional occupations in advertising, marketing, and public relations | 25,623 | 24,600 | 1,022 |
| | Architects | 19,749 | 19,259 | 490 |
| | Landscape architects | 2,376 | 2,350 | 27 |
| | Urban and land use planners | 14,258 | 14,009 | 250 |
| | Architecture and science managers | 10,139 | 9,861 | 278 |
| | Landscape and horticultural technicians and specialists | 23,626 | 22,586 | 1,040 |
| | Architectural technologists and technicians | 12,468 | 12,014 | 454 |
| | Drafting technologists and technicians | 32,564 | 31,566 | 998 |
| | Web designers and developers | 32,465 | 31,377 | 1,088 |

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|---|---|---|---|---|
| | Industrial designers | 10,813 | 10,482 | 330 |
| | Graphic designers and illustrators | 73,714 | 72,307 | 1,407 |
| | Interior designers | 30,801 | 30,301 | 500 |
| | Theatre, fashion, exhibit, and other creative designers | 17,705 | 17,489 | 216 |
| | Patternmakers—textile, leather, and fur products | 1,212 | 1,211 | 1 |
| | Graphic arts technicians | 10,595 | 10,097 | 498 |
| **Written and published works** | Total | 142,224 | 140,435 | 1,789 |
| | Authors and writers | 31,382 | 30,911 | 471 |
| | Editors | 19,254 | 19,077 | 177 |
| | Journalists | 12,957 | 12,733 | 224 |
| | Translators, terminologists, and interpreters | 20,458 | 20,341 | 117 |
| | Desktop publishing operators and related occupations | 1,762 | 1,745 | 16 |
| | Supervisors, printing, and related occupations | 3,193 | 3,170 | 23 |
| | Printing press operators | 15,590 | 15,423 | 168 |
| | Printing machine operators | 6,993 | 6,853 | 140 |
| | Camera, platemaking and other pre-press occupations | 2,550 | 2,509 | 41 |
| | Binding and finishing machine operators | 4,836 | 4,651 | 186 |
| | Correspondence, publication and related clerks | 23,249 | 23,023 | 226 |
| **Audio-visual and interactive media** | Total | 25,392 | 24,793 | 599 |
| | Film and video camera operators | 6,598 | 6,576 | 22 |
| | Announcers and other broadcasters | 7,340 | 7,176 | 164 |
| | Senior managers—trade, broadcasting, and other services, not elsewhere classified | 742 | 741 | 1 |
| | Broadcast technicians | 2,311 | 2,304 | 7 |
| | Computer programmers and interactive media developers | 8,401 | 7,996 | 405 |
| **Sound recording** | Total | 4,927 | 4,927 | - |
| | Producers, directors, choreographers, and related occupations & conductors, composers, and arrangers | 4,927 | 4,927 | - |
| **Multidomain*** | Total | 54,145 | 53,573 | 572 |
| | Managers—publishing, motion pictures, broadcasting, and performing arts | 8,929 | 8,732 | 197 |
| | Audio and video recording technicians | 15,351 | 15,272 | 79 |
| | Other technical support and coordinating occupations in motion pictures, broadcasting, and the performing arts | 17,140 | 16,937 | 203 |
| | Support occupations in motion pictures, broadcasting, and the performing arts | 12,725 | 12,632 | 94 |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain

Sources: The Conference Board of Canada; Statistics Canada, Job Vacancy and Wage Survey (2016-2018).

Going forward, labour shortages are projected to continue to ramp up for many occupations, as labour demand is forecast to increase at a faster pace than supply. (See Table 8.3.5.) By 2026, the degree to which labour demand could exceed labour supply is projected to exceed 20,050 jobs. This does not suggest that the level of vacancies reported by the Job Vacancy and Wage Survey for that year would equal this figure. Rather, this figure reflects the cumulative effect of previous labour shortages that result in curtailed expansion and investment decisions together with the outright labour shortages for that year.

### Table 8.3.5: Labour Demand, Supply, and Shortage in Cultural Occupations, 2026 (number of jobs)

| Domains | Subdomains | 2026 Labour Demand | 2026 Labour Supply | 2026 Shortage |
|---|---|---|---|---|
| **Cultural Occupations, Total** | | 933,225 | 912,650 | 20,575 |
| **Heritage and libraries** | Total | 120,172 | 114,513 | 5,659 |
| | Archivists | 2,791 | 2,657 | 134 |
| | Records management and filing clerks | 11,060 | 10,737 | 323 |
| | Librarians | 14,697 | 13,917 | 780 |
| | Supervisors, library, correspondence, and related information clerks | 6,972 | 6,863 | 109 |
| | Library clerks | 26,914 | 26,324 | 590 |
| | Conservators and curators | 2,838 | 2,681 | 157 |
| | Technical support occupations related to museums and art galleries | 11,767 | 11,180 | 586 |
| | Conservation and fishery officers | 7,829 | 7,511 | 318 |
| | Biological technologists and technicians | 16,654 | 15,409 | 1,246 |
| | Forestry technologists and technicians | 11,856 | 10,742 | 1,114 |
| | Library, archive, museum, and art gallery managers | 6,795 | 6,492 | 304 |
| **Live performance** | Total | 171,232 | 169,086 | 2,145 |
| | Producers, directors, choreographers, and related occupations | 38,581 | 37,610 | 971 |
| | Musicians and singers | 52,149 | 52,124 | 25 |
| | Dancers | 15,230 | 15,135 | 95 |
| | Actors and comedians | 20,789 | 20,691 | 99 |
| | Other performers | 10,980 | 10,859 | 120 |
| | Conference and event planners | 33,503 | 32,667 | 836 |
| **Visual and applied arts** | Total | 411,959 | 402,760 | 9,199 |
| | Painters, sculptors, and other visual artists | 30,445 | 30,350 | 94 |
| | Photographers | 22,630 | 22,612 | 18 |
| | Photographic and film processors | 2,747 | 2,676 | 71 |
| | Artisans and craftspersons | 19,143 | 19,080 | 63 |
| | Professional occupations in advertising, marketing, and public relations | 27,559 | 26,547 | 1,012 |

| | | | | |
|---|---|---|---|---|
| | Architects | 20,663 | 20,175 | 487 |
| | Landscape architects | 2,474 | 2,449 | 25 |
| | Urban and land use planners | 14,849 | 14,602 | 247 |
| | Architecture and science managers | 10,553 | 10,278 | 275 |
| | Landscape and horticultural technicians and specialists | 24,624 | 23,542 | 1,083 |
| | Architectural technologists and technicians | 12,973 | 12,523 | 450 |
| | Drafting technologists and technicians | 33,895 | 32,902 | 993 |
| | Web designers and developers | 34,566 | 33,484 | 1,082 |
| | Industrial designers | 11,606 | 11,186 | 420 |
| | Graphic designers and illustrators | 78,567 | 77,162 | 1,405 |
| | Interior designers | 32,835 | 32,336 | 499 |
| | Theatre, fashion, exhibit, and other creative designers | 19,150 | 18,663 | 487 |
| | Patternmakers—textile, leather, and fur products | 1,306 | 1,292 | 14 |
| | Graphic arts technicians | 11,375 | 10,901 | 473 |
| **Written and published works** | Total | 132,666 | 130,895 | 1,771 |
| | Authors and writers | 31,210 | 30,741 | 469 |
| | Editors | 19,121 | 18,945 | 175 |
| | Journalists | 12,497 | 12,275 | 221 |
| | Translators, terminologists, and interpreters | 21,098 | 20,982 | 116 |
| | Desktop publishing operators and related occupations | 1,678 | 1,662 | 15 |
| | Supervisors, printing, and related occupations | 3,291 | 3,268 | 23 |
| | Printing press operators | 12,814 | 12,648 | 166 |
| | Printing machine operators | 5,758 | 5,620 | 138 |
| | Camera, platemaking and other pre-press occupations | 2,099 | 2,058 | 41 |
| | Binding and finishing machine operators | 3,995 | 3,814 | 181 |
| | Correspondence, publication and related clerks | 19,106 | 18,881 | 225 |
| **Audio-visual and interactive media** | Total | 29,166 | 28,294 | 871 |
| | Film and video camera operators | 7,939 | 7,843 | 96 |
| | Announcers and other broadcasters | 8,172 | 7,976 | 196 |
| | Senior managers—trade, broadcasting, and other services, not elsewhere classified | 884 | 866 | 18 |
| | Broadcast technicians | 2,190 | 2,182 | 7 |
| | Computer programmers and interactive media developers | 9,982 | 9,428 | 554 |
| **Sound recording** | Total | 5,328 | 5,328 | - |
| | Producers, directors, choreographers, and related occupations & conductors, composers, and arrangers | 5,328 | 5,328 | - |
| **Multidomain*** | Total | 62,703 | 61,772 | 930 |
| | Managers—publishing, motion pictures, broadcasting, and performing arts | 10,445 | 10,069 | 376 |
| | Audio and video recording technicians | 17,742 | 17,610 | 132 |

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|---|---|---|---|---|
| | Other technical support and coordinating occupations in motion pictures, broadcasting, and the performing arts | 19,803 | 19,529 | 274 |
| | Support occupations in motion pictures, broadcasting, and the performing arts | 14,713 | 14,565 | 148 |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain
Source: The Conference Board of Canada.

## *8.4 Impact of Labour Shortages*

Based on the share of total employment in each domain that was unfilled, the level of output (revenues) lost as result of labour shortages can be calculated. (See Table 8.4.1.) The figures in Table 8.4.1 exclude the impact of shortages in cultural occupations on the functioning of the transversal domains (including education and training, governance, funding, and professional support) and the cultural sector's production of non-cultural goods and services. Overall, it is estimated that labour shortages have already resulted in reducing the potential output in the sector by nearly $975,000 in 2015 and over $1.2 million in 2018 (2012 dollars).

**Table 8.4.1: Recent Impact of Shortages on Cultural Sector (Excluding Transversal and Other Products)**
**(revenues, 2012 $ 000s)**

| Domains | 2015 | 2016 | 2017 | 2018 |
|---|---|---|---|---|
| **Cultural sector** | 974.8 | 962.5 | 1,084.0 | 1,238.3 |
| Heritage and libraries | 15.8 | 15.5 | 20.9 | 19.4 |
| Live performance | 26.1 | 22.9 | 37.4 | 40.5 |
| Visual and applied arts | 293.9 | 295.9 | 294.2 | 329.7 |
| Written and published works | 162.0 | 136.4 | 192.5 | 190.8 |
| Audio-visual and interactive media | 467.0 | 481.5 | 528.9 | 644.8 |
| Sound recording | - | - | - | - |
| Multidomain* | 10.0 | 10.2 | 10.0 | 13.1 |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain
Sources: The Conference Board of Canada; Statistics Canada, Job Vacancy and Wage Survey (2016–2018).

Once again, based on the projected share of total employment in each domain that could be in shortage out to 2026, estimates can be generated to reflect the level of output (revenues) that will be lost. (See Table 8.4.2.) The figures in Table 8.4.2 also exclude the potential impact of shortages in cultural occupations on the functioning of the transversal domains (including education and training, governance, funding, and professional support) and the cultural sector's production of non-cultural goods and services. Overall, it is estimated that labour shortages will curtail the potential output in the sector by over $1.5 million in 2026 (2012 dollars).

**Table 8.4.2: Future Impact of Shortages on Cultural Sector (Excluding Transversal and Other Products)**
**(revenues, 2012 $ 000s)**

| Domains | 2026 |
|---|---|
| **Cultural Sector** | 1,536.6 |
| Heritage and libraries | 58.7 |
| Live performance | 53.7 |
| Visual and applied arts | 387.2 |
| Written and published works | 216.8 |
| Audio-visual and interactive media | 779.5 |
| Sound recording | - |
| Multidomain* | 40.7 |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain

Sources: The Conference Board of Canada; Statistics Canada, Job Vacancy and Wage Survey (2016–2018).

## *8.5 Summary*

Despite the various data challenges that exist in accurately projecting labour market trends for the cultural sector, this section of the report has provided a context to build from. In particular, the analysis in this section quantifies the degree to which employment in each domain is unfilled and will potentially be unfilled in the future. Conservatively, labour shortages are estimated to have reduced the cultural sector's potential output by over $1.2 million in 2018 alone (2012 dollars). Labour shortages are projected to cost the cultural sector over $1.5 million annually in lost output (2012 dollars) by 2026.

**While the topic of labour shortages in the cultural sector is rarely discussed, in large part because a very high percentage of occupations are filled by self-employed individuals, the analysis presented here shows that labour shortages do exist and, in some cases, are projected to worsen.**

# 9. Data Challenges and Limitations

This chapter describes the various data challenges encountered in the production of this labour market information report and identifies the associated limitations. The first section discusses the specific data challenges faced in the production of this report. The second section discusses the associated limitations to the findings in this report. Where possible, the next chapter (Chapter 10: Recommendations) discusses possible solutions to remedy or minimize the challenges associated with the data.

## *9.1 Data Challenges*

While Statistics Canada's census provides the most detailed data with respect to cultural workers' demographics and labour-related information (work activity, labour force status, employment income, etc.), the implementation of the census dictates that it can capture only a snapshot of the cultural labour force during the week in which the 2016 Census was conducted (Sunday, May 1, to Saturday, May 7, 2016). Indeed, given the high rate of seasonal workers in the cultural sector, there is a high likelihood that such a short survey period is insufficient to gain a full grasp of the cultural labour force. Specifically, a seasonal cultural worker's involvement in the cultural sector would not be captured by the census if the worker was engaging in other non-cultural occupation during the survey week.

In addition, since the census probes only an individual's primary occupation, two possible scenarios could arise and contribute to the underestimation of an individual's involvement in the cultural sector. The first scenario is if a cultural worker spends more hours working in other sectors, as is common among individuals in the cultural sector. Because the census records only the occupation in which a worker spends the most time, this segment of cultural workers will be left out. The second scenario centres on the fact that it is common for a cultural worker to take on multiple cultural roles/occupations. While the census evaluates and assigns a person's occupation according to both job title and work activity, the chance of mis-assigning that occupation would increase if a cultural worker were involved in a series of heterogeneous work activities.

To estimate the degree to which an individual's involvement in the cultural sector was underestimated, the Conference Board's labour market information survey of individuals in the cultural sector asked respondents to select multiple occupations that most accurately reflected their involvement in culture. As presented in Table 9.1, every cultural worker holds on average two occupations, suggesting the likelihood of a person's involvement in culture not being fully captured by the census could run high. In fact, in the sound recording domain, each individual has 3.2 occupations on average.

### Table 9.1.1: Average Number of Occupations Reported, by Domain

| Domain | Average number of occupations reported |
|---|---|
| Heritage and libraries | 1.5 |
| Live performance | 1.9 |
| Visual and applied arts | 2.5 |
| Written and published works | 2.0 |
| Audio-visual and interactive media | 1.5 |
| Sound recording | 3.2 |
| **Total** | **2.0** |

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.

The survey of individuals in the cultural sector also probed respondents' working hours outside the cultural sector, as well as their nature of employment (whether they had worked on a full-time, part-time, or seasonal basis over the past year). The results suggest that, in aggregate, nearly 8 per cent of respondents worked more hours outside the cultural sector and thus would likely not be captured by the census. Meanwhile, close to 16 per cent of respondents working in the cultural sector worked on a seasonal basis. While the chance of these individuals not working in culture during the census week varied by occupation and by domain, it certainly added a layer of downward bias to the estimation of cultural labour force.

A more mixed picture was found at the domain level. Only a small share of respondents in heritage and libraries domain indicated they spent more hours working outside culture. But in the audio-visual and interactive media domain, 20 per cent of camera operators, scriptwriters, and actors said they did. A similar pattern was found in live performance and sound recording, with circus artists and music arrangers having the highest likelihood of working more hours outside culture. A higher percentage of individuals working outside culture tends to equate to a higher likelihood of underestimating the size of cultural labour force.

### Table 9.1.2: Likelihood of Underreporting—Heritage and Libraries

| Occupation | Working more hours outside the cultural sector | Seasonal worker |
|---|---|---|
| Archivist | 3% | 0% |
| Exhibitions designer or planner | 3% | 3% |
| Conservator/curator | 2% | 2% |
| Library worker | 1% | 3% |
| Librarian (master’s degree or equivalent) | 1% | 1% |
| Registrar | 0% | 7% |
| Library and public archive technician | 0% | 4% |

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.
Note: occupations in which workers did not work more hours outside the cultural sector or did not work on a seasonal basis are not shown.

### Table 9.1.3: Likelihood of Underreporting—Live Performance

| Occupation | Working more hours outside the cultural sector | Seasonal worker |
|---|---|---|
| Circus artist | 25% | 0% |
| Choreographer | 11% | 17% |
| Actor | 10% | 33% |
| Playwright | 10% | 19% |
| Comedian | 9% | 18% |
| Musician/singer | 8% | 27% |
| Wardrobe worker | 8% | 54% |
| Dancer | 5% | 18% |
| Stagehand | 4% | 37% |
| Presenter | 3% | 37% |
| Manager (administration, HR, communications, marketing, theatre, production, etc.) | 2% | 12% |
| Technician (automation, lighting, rigging, sound, etc.) | 1% | 12% |
| Props master or worker | 0% | 31% |
| Conductor/composer/arranger | 0% | 50% |

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.
Note: occupations in which workers did not work more hours outside the cultural sector or did not work on a seasonal basis are not shown.

## Table 9.1.4: Likelihood of Underreporting—Visual and Applied Arts

| Occupation | Working more hours outside the cultural sector | Seasonal worker |
|---|---|---|
| Metalsmith | 14% | 19% |
| Painter | 9% | 14% |
| Illustrator | 9% | 17% |
| Sculptor | 6% | 15% |
| Artisans/craftsperson/patternmaker | 6% | 13% |
| Visual Artist | 6% | 12% |
| Manager (art gallery management, administration, HR, communications, marketing, etc.) | 5% | 5% |
| Designer | 4% | 15% |
| Graphic designer | 3% | 16% |
| Theatre, fashion, exhibit and another creative designer | 0% | 16% |
| Photographer | 0% | 25% |
| Art dealer | 0% | 18% |
| Technician (graphic arts, etc.) | 0% | 13% |
| Printmaker | 0% | 11% |
| Curator | 0% | 10% |
| Potter | 0% | 10% |

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.
Note: occupations in which workers did not work more hours outside the cultural sector or did not work on a seasonal basis are not shown

## Table 9.1.5: Likelihood of Underreporting—Written and Published Works

| Occupation | Working more hours outside the cultural sector | Seasonal worker |
|---|---|---|
| Journalist | 13% | 25% |
| Author/writer | 12% | 15% |
| Operations/logistics | 8% | 0% |
| Production/design | 5% | 5% |
| Publisher/editor | 5% | 5% |
| Manager (administration, HR, communications, etc.) | 5% | 0% |
| Marketing/advertising associate | 4% | 4% |

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018—19.
Note: occupations in which workers did not work more hours outside the cultural sector or did not work on a seasonal basis are not shown

### Table 9.1.6: Likelihood of Underreporting—Audio-Visual and Interactive Media

| Occupation | Working more hours outside the cultural sector | Seasonal worker |
|---|---|---|
| Camera operator | 20% | 0% |
| Scriptwriter | 20% | 27% |
| Actor | 20% | 35% |
| Producer | 15% | 19% |
| Announcer/ another broadcaster | 14% | 14% |
| Director | 13% | 22% |
| Editor | 7% | 18% |
| Technician (lighting, sound, broadcast, audio and video recording, etc.) | 4% | 18% |
| Manager (studio, HR, communications, administration, marketing, production, etc.) | 4% | 15% |
| Engineer (sound, etc.) | 0% | 33% |

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.
Note: occupations in which workers did not work more hours outside the cultural sector or did not work on a seasonal basis are not shown.

### Table 9.1.7: Likelihood of Underreporting—Sound Recording

| Occupation | Working more hours outside the cultural sector | Seasonal worker |
|---|---|---|
| Conductor/music director | 100%* | 0% |
| Music arranger | 29% | 14% |
| Manager (music artist management, administration, HR, communications, marketing, etc.) | 20% | 11% |
| Musician | 18% | 10% |
| Singer (opera, pop, jazz, etc.) | 14% | 14% |
| Composer | 13% | 0% |
| Songwriter | 8% | 13% |
| Music publisher | 0% | 15% |
| Technician (instrument, recording, sound effects, etc.) | 0% | 67% |
| Producer | 0% | 21% |

Source: The Conference Board of Canada, Cultural Sector Labour Market Information Survey (Individual), 2018–19.
Note: occupations in which workers did not work more hours outside the cultural sector or did not work on a seasonal basis are not shown.
* Although 100 per cent of conductor/music directors indicated more hours working outside the cultural sector, the percentage was not representative, as only one conductor/music director responded to the labour market information individual survey.

## *9.2 Limitations*

While this report presents The Conference Board of Canada’s best effort to provide a comprehensive profile of the cultural sector, readers should be aware of limitations.

The first set of limitation stem from the use and reliance of census data. In particular, this study relies heavily on Statistics Canada’s census to inform readers on cultural workers’ demographics, employment status, income, and many other aspects associated with working in the sector. Unfortunately, the design of the census questionnaire and its implementation in the field needs to strike a careful balance between the level of analysis possible and the level of effort required from respondents to complete the survey. As a consequence, much of the information about the distinct employment arrangement of many cultural workers—including the high incidence of holding multiple jobs and working on a seasonal or as-needed (gig) basis—is not captured in the census.

Another limitation of the census data is that it fails to accurately account for the important non-paid time spent by many cultural workers on practice and preparation. This missing component likely not only contributes to an underestimation of the size of the cultural workforce but also leads to a potential misclassification of individuals’ work activity in the cultural sector. In addition, many occupation titles in the current National Occupational Classification system are outdated, making it challenging to accurately measure involvement in the cultural sector.

The second limitation stems from the use of Statistics Canada’s Business Register data to compile the employer profile. While the Business Register provides a detailed snapshot of all Canadian establishments, a business needs to meet one of the three criteria (has employees, is incorporated, is a GST/HST registrant) to be included in the Business Register. Small cultural establishments, particularly sole proprietorships, often do not meet any of these criteria and thus are not captured by the Business Register.

Another layer of complication is attributed to the diverse business activities in which many cultural establishments engage. Indeed, large cultural enterprises often tap into multiple lines of culture-related businesses. Many internet streaming services, for instance, both produce and disseminate video content. Assigning a multi-faceted cultural business to a specific industry, therefore, becomes difficult under the current industry classification system and is up to Statistics Canada’s discretion. As a result, the employer profile in this study may be skewed due to particular singular domain classifications.

A third limitation results from the lack of official data about some domains and business activities. Specifically, statistics related to the heritage and libraries domain in the current Culture Satellite Account (and thus in this report) represent only private institutions, a small portion of all heritage and library institutions. The exclusion of public institutions by Statistics Canada is due to the inherent difficulties of collecting and segregating public expenditure data into the appropriate heritage and libraries subdomains.

Moreover, the rise of digitalization within the cultural sector poses significant challenges to measuring the digital presence of cultural activities and its contribution to the Canadian economy. As Statistics

Canada is still in an early stage of estimating the digital economic activity, a considerable portion of the digital goods and services produced in Canada may be missing in the findings of this report. Another by-product of digitalization is that many cultural products consumed by Canadians today are provided from outside Canada, most notably, by foreign audio and video streaming services. The jobs these companies create in Canada and the revenues they generate from Canada are difficult to measure given their foreign ownership. As a result, it is likely that much of this activity is not included in this report.

Lastly, despite the best efforts by the Conference Board and its partners to disseminate the cultural sector labour market information surveys, only a relatively small number of individuals (n = 34 out of 1,867) and a small number of employers (n = 4 out of 311) reported being involved in the sound recording domain. As a result, the findings from this domain should be used with caution.

 

# 10. Recommendations

This chapter identifies recommendations to strengthen the cultural workforce and better address data gaps.

## *10.1 Recommendations to Strengthen the Cultural Workforce*

1. **Continue to develop and support mentorships for emerging leaders and managers in mid-career positions in order to facilitate succession planning and to strengthen the cultural infrastructure generally.**

Participants in the focus groups told us that emerging leaders and managers at the mid-career level often lack the skills, knowledge, and confidence to assume the responsibilities of more senior positions. Meanwhile, those in senior roles find time constraints and heavy workloads prevent them from preparing potential future leaders by passing on the skills and knowledge they have acquired. Successful transmission of knowledge and corporate memory is best achieved through mentoring. Mentorship and succession planning can occur only if senior-role incumbents are available to devote time to emerging leaders and mid-career managers, to equip them with the skills and confidence needed to enter into senior positions. Mentoring also gives senior managers the opportunity to implement succession planning in a way that helps ensure the long-term strength and success of their organization.

2. **Continue to support internships and mentorships for entry-level workers in administrative positions in order to strengthen the cultural infrastructure.**

Participants in the focus groups frequently addressed the need for entry-level workers—particular those in administrative and eventual management positions—to rapidly integrate into complex workplaces that require them to perform numerous tasks and assume multiple roles. Prior to filling entry-level positions, organizations should offer internships with access to mentors to help the entry-level workers establish a career in the cultural sector, thereby strengthening the cultural infrastructure.

3. **Train staff and boards of directors on human resource best practices related to diversity, inclusion, and harassment prevention.**

Given the growing diversity in the Canadian workforce, staff and boards need to stay ahead of the curve on how to promote equal and fair work environments and prepare the proper mechanisms to protect all involved. Being properly prepared to deal with issues after the fact is no longer enough. Getting ahead of potential issues and proactively ensuring a safe and inclusive work environment for all has become a must. Training and resources are necessary to help bring boards and staff to that point of awareness and readiness.

4. **Provide accessible training for technological skills and business skills across Canada to strengthen cultural infrastructure at all levels.**

Based on the findings from the Conference Board's cultural labour market information surveys, technological and business skills are two of the most needed skill sets throughout the cultural sector. Technological skills relate to the use of emerging technology, such as new software and new media. The deficiency of such skills is particularly severe among domains that are going through drastic digitalization processes. Business skills relate to tasks involved in managing a business, such as marketing, sales, and accounting—skills that are often required of self-employed cultural workers.

The provision of accessible training for these two skill sets is key to the long-term success of many cultural businesses and individuals. Although the required breadth and depth of this knowledge varies by domain and occupation, free online courses and reading materials on relevant skills should be developed and made available to the arts and culture community.

5. **Support projects for creative artists to bring their skills to youth learning environments.**

In classrooms or as extracurricular programs, the abundance of artistry and creativity in the cultural workforce could be offered greater outlets while picking up where public funding cutbacks have hurt arts and culture curriculum offerings. Many cultural workers are highly educated, and in a position to share their craft in education environments. Research shows that youth engaged in cultural activities perform better in general in school.[48]

Offering creative workers outlets to contribute to the country's education, specifically in primary and high school environments, provides real access for students to experiential learning about arts while offering cultural workers a variety of platforms and environments in which to practise their trade, preferably on a paid basis. Arts-funding bodies could incorporate this as a requisite for any state-funded activities. Such a program would also contribute to the sustainability of the wider economy. Youth need to be exposed to arts and culture in order to one day become knowledgeable consumers who, in turn, also support the valuation of cultural work and output for future generations.

6. **Help self-employed cultural workers access and gain admissibility to Employment Insurance benefits.**

Despite a common belief to the contrary, self-employed cultural workers can access Employment Insurance special benefits by registering with the Canada Employment Insurance Commission. This lack of awareness could be addressed through communications by national, provincial, and regional stakeholders (e.g., arts service organizations, professional associations, unions, guilds, and support and

[48] Canadian Arts Coalition, "Children and the Arts."

funding bodies). Information, packages, sessions, and/or seminars could be prepared and disseminated to dispel the myth and provide self-employed cultural workers with the knowledge and tools to access the process.

7. **Review copyright laws to determine ways for visual and other artists to reap the ongoing benefits of their creative output.**

Unlike musicians who can receive royalties for years after a song is composed and/or recorded, visual artists and craftspeople do not have access to royalties. In other words, a painting sold today for $500 and resold two years later for $800 does not provide the artist-painter with a royalty on the accrued value of their art. A review of copyright laws could help determine ways for visual and other artists to receive ongoing benefits from their creative output.

8. **Conduct a survey and study of the necessary skill sets that volunteers need to bring to organizations.**

The generous contribution from volunteers is key to the success of many not-for-profit cultural organizations. In fact, cultural volunteers, on average, contribute more hours than volunteers in any other type of organization.[49] On top of that, cultural workers are generally more committed to their volunteer engagement, sticking with the same organization for a relatively long period of time.[50]

It is worth noting, however, that the activities volunteers commonly participate in—such as sitting as a member of a committee or board, organizing activities and events, and performing administrative work—often require business, communication, and organizational skills that volunteers do not necessarily possess. It would be beneficial to identify the most necessary skill sets and then provide appropriate training to help volunteers develop and improve these skills sets. The training, in turn, would provide additional incentives for individuals who wish to acquire such skills to devote more time to volunteering.

9. **Value volunteer hours.**

This labour market information study has noted the endemic need for volunteers and unpaid hours to keep cultural organizations afloat. Following the survey of necessary skills (recommendation #8 in this list) brought in by unpaid labour, a pilot program could be run to value the necessary work that is done for free by recognizing these contributions by skilled workers. Employers could issue a type of T-slip to recognize volunteer hours, something that could supplement paid insurable employment to help

[49] Hill Strategies, *Volunteers and Donors in Arts and Culture Organizations in Canada in 2013.*
[50] Ibid.

provide a safety net and allow cultural workers to qualify for Employment Insurance when paid gigs dry up.

Such a program would exclude the engagements and duties of boards of directors. It would include skilled labour contributions scaled at market value, such as managerial contributions (e.g., oversight and/or executive decision-making), specialized work (e.g., museum curator, recording artists, lighting specialist, accounting and legal experts), and general administration and services (e.g., bookkeeping, marketing, news-list administrator). It would also include other less skilled support work, such as theatre ushers, stagehands, and snack bar attendants.

10. **Create a national artists registry.**

As a support mechanism for all of the recommendations and their intended outcomes, the creation of an arms'-length governed national registry could improve information gathering and dissemination to and from cultural workers, businesses, organizations, and government bodies.

## *10.2 Recommendations to Address Data Gaps*

11. **Using the cultural sector as a case study, Statistics Canada should undertake a multi-year pilot project to assess new ways to collect workforce data that would fill gaps in existing data and better report on the gig economy.**

The data challenges that emerged while this study was being developed support the notion that Statistics Canada's current statistical programs are not sufficient to depict a full picture of the cultural workforce given its many distinct characteristics. Most notably, the working lives of cultural workers are often characterized by work in multiple jobs and on a gig basis. The census—the best available data source for demographics, educational attainment, employment status, and income—captures only an individual's primary occupation (defined as the occupation in which the individual worked the most hours during the reference week), leaving employment in other occupations unaccounted for. In addition, while the accuracy of employment income data was improved in the latest census through the use of personal income tax and benefits records, the composition of income remains unclear.

Instead of amending the census questionnaire to probe an individual's multiple occupations and sources of income, something that may also apply to individuals working in other sectors, a better solution is to use the cultural sector as a case study and conduct a pilot project to assess better practices in data collection. This could be achieved through industry consultations and tailored surveys that would accommodate the unique characteristics of cultural workers. For example, the surveys should allow participants to report all occupations held and the time spent working in each occupation, as well as income earned from each job. The proposed case study could not only fill data gaps in existing surveys but also be beneficial for future data collection in the gig economy.

12. **Statistics Canada should develop a human resources module for the cultural sector within its Culture Satellite Account.**

While the Culture Satellite Account provides an important snapshot of employment in the cultural sector and its associated contribution to the economy, there is considerable room to improve this accounting framework, particularly its employment statistics. Specifically, under the current framework, a part-time job and a full-time job are treated as equal, regardless of the discrepancies in actual hours worked during the week. On top of that, a seasonal job that exists for only a few months is converted into a fraction of a job for the year (e.g., if a job exists for three months during the year, it counts as one-quarter of a job). The employment statistic, as a result, is not an ideal measure of labour inputs to production, considering it's a combination of jobs of varying capacity.

Moreover, because the Culture Satellite Account framework aggregates occupations into domains based on their nature of creative activities and outputs instead of the actual domain in which individuals work, the employment statistics in some domains are skewed. For example, actors may work in film and video, broadcasting, and performing arts, but they are aggregated into the live performance domain because their creative output is primarily related to performance. Actors' involvement in other domains, consequently, is excluded, and therefore the size and economic contributions of these respective domains is skewed.

These shortcomings, however, could be addressed by creating a human resources module for the Culture Satellite Account. By using additional data sources, including the Canadian System of National Accounts, the census, the Labour Force Survey, and the Survey of Employment Payroll and Hours, a human resources module could serve two purposes. The first would be to provide a better measurement of the employment measures, such as full-time equivalent jobs (part-time jobs would be converted into full-time jobs on the basis of actual hours worked; e.g., two part-time jobs of 20 hours per week would be converted into one full-time job at 40 hours per week), total hours worked for each occupation, and employment earnings. The second would be to accurately allocate cultural workers and their outputs into appropriate domains based on the actual domains they work in instead of the nature of their work and outputs.

13. **Statistics Canada should engage stakeholders in the cultural sector (particularly the various domains) to update and improve upon the nomenclature used to depict the sector.**

The current cultural statistics framework was published by Statistics Canada in 2011. Many domains have undergone drastic changes since then. For example, many new occupations have been created as technology has advanced and consumer demand has shifted. As a result, the occupations included in the framework need to be updated to reflect the changes. Crafts and interactive media, in particular, are two of the subdomains that require a thorough rework. The craft sector consists of a wide range of heterogeneous creative and artistic activities; an amendment to the occupation list (and preferably to the National Occupation Classification) could be made to better reflect the scale and scope of craft practices. The interactive media sector has gone through rapid growth in recent years, and the current occupation list therefore does not capture the many newly created occupations.

Improving the nomenclature used to describe the cultural sector is also crucial for the proposed human resource module, as inputs from stakeholders in the cultural sector are needed to determine the cross-domain involvement of certain occupations. For instance, industry stakeholders could help inform Statistics Canada on a musician's involvement in domains other than live performance.

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# Appendix A: Domain Definitions

In measuring the performance of the cultural sector, it is useful to identify distinct industry segments, or "domains," in the cultural sector that share similar characteristics. The following section lists each domain in the cultural sector and the corresponding major subdomains contained within them, along with their associated North American Industry Classification System (NAICS) codes. These domains are similar to those found in the Statistics Canada's framework for cultural statistics.[51]

The list of industries that make up the cultural sector excludes most wholesale and retail distribution of cultural goods and services. In many cases, cultural goods and services are sold at a wide range of wholesale and retail outlets and are thus difficult to capture. Moreover, in most cases, the share of cultural goods and services sold by these outlets would be very small.

## Heritage and Libraries

### Table A.1 Heritage and Libraries

| Subdomain | NAICS code | NAICS title |
|---|---|---|
| **Archives** | 519122 | Archives |
| **Libraries** | 519121 | Libraries |
| **Cultural Heritage** | 712111 | Non-Commercial Art Museums and Galleries |
| | 712115 | History and Science Museums |
| | 712119 | Other Museums |
| | 712120 | Historic and Heritage Sites |
| **Natural Heritage** | 712130 | Zoos and Botanical Gardens |
| | 712190 | Nature Parks and Other Similar Institutions |

## Live Performance

### Table A.2 Live Performance

| Subdomain | NAICS code | NAICS title |
|---|---|---|
| **Performing Arts** | 711111 | Theatre (except Musical) Companies |
| | 711112 | Musical Theatre and Opera Companies |
| | 711120 | Dance Companies |
| | 711130 | Musical Groups and Artists |
| | 711190 | Other Performing Arts Companies |
| | 711311 | Live Theatres and Other Performing Arts Presenters with Facilities |
| | 711321 | Performing Arts Promoters (Presenters) without Facilities |
| | 711512 | Independent Actors, Comedians and Performers |
| **Festivals and Celebrations** | 711322 | Festivals without Facilities |

[51] Statistics Canada, "Conceptual Framework for Culture Statistics 2011."

## Visual and Applied Arts

### Table A.3 Visual and Applied Arts

| Subdomain | NAICS code | NAICS title | Partial | Notes |
|---|---|---|---|---|
| **Original Visual Art** | 453920 | Art Dealers | | |
| | 711511 | Independent Artists, Visual Arts | | |
| **Art Reproductions** | 442292 | Print and Picture Frame Stores | | |
| **Photography** | 519190 | All Other Information Services | * | Stock photo agencies |
| | 541920 | Photographic Services | | |
| | 812921 | Photo Finishing Laboratories (except One-Hour) | | |
| | 812922 | One-Hour Photo Finishing | | |
| **Crafts** | 313 | Textile Mills | * | Craft production only |
| | 314 | Textile Product Mills | * | Craft production only |
| | 315 | Clothing Manufacturing | * | Craft production only |
| | 316 | Leather and Allied Product Manufacturing | * | Craft production only |
| | 321 | Wood Product Manufacturing | * | Craft production only |
| | 323113 | Commercial Screen Printing | * | Silk screening artworks, clothing, posters |
| | 327 | Non-Metallic Mineral Product Manufacturing | * | Craft production only |
| | 332 | Fabricated Metal Product Manufacturing | * | Craft production only |
| | 337 | Furniture and Related Product Manufacturing | * | Craft production only |
| | 339 | Miscellaneous Manufacturing | * | Craft production only |
| | 4143 | Home Furnishings Wholesaler-Distributors | * | Wholesalers of craft products only |
| **Crafts** | 414410 | Jewellery and Watch Wholesaler-Distributors | * | Wholesalers of craft products only |
| | 4483 | Jewellery, Luggage and Leather Goods Stores | * | Craft stores or studios only |
| | 453220 | Gift, Novelty and Souvenir Stores | * | Craft stores or studios only |
| **Advertising** | 541810 | Advertising Agencies | * | Only those establishments primarily engaged in the creation of advertising content |
| | 541850 | Display Advertising | * | Only those establishments primarily engaged in the creation of advertising content |
| | 541860 | Direct Mail Advertising | * | Only those establishments primarily engaged in the creation of advertising content |
| | 541891 | Specialty Advertising Distributors | * | Only those establishments primarily engaged in the creation of advertising content |
| | 541899 | All Other Services Related to Advertising | * | Only those establishments primarily engaged in the creation of advertising content |
| **Architecture** | 541310 | Architectural Services | | |

 

| | | | | |
|---|---|---|---|---|
| | 541320 | Landscape Architectural Services | | |
| | 541340 | Drafting Services | | |
| **Design** | 541410 | Interior Design Services | | |
| | 541420 | Industrial Design Services | | |
| | 541430 | Graphic Design Services | | |
| | 541490 | Other Specialized Design Services | | |
| | 541510 | Computer Systems Design and Related Services | * | Website design only |

## Written and Published Works

### Table A.4 Written and Published Works

| Subdomain | NAICS code | NAICS title | Partial | Notes |
|---|---|---|---|---|
| **Books** | 511130 | Book Publishers | | |
| **Periodicals** | 511120 | Periodical Publishers | | |
| **Newspapers** | 511110 | Newspaper Publishers | | |
| | 519110 | News Syndicates | | |
| **Other Published Works** | 511190 | Other Publishers | | |
| **Collected Information** | 511140 | Directory and Mailing List Publishers | | |
| **Unallocated** | 323119 | Other Printing | * | Printing of books, art works, calendars, magazines, newspapers, etc. |
| | 323120 | Support Activities for Printing | * | Printing of books, art works, calendars, magazines, newspapers, etc. |
| | 414420 | Book, Periodical and Newspaper Wholesaler-Distributors | | |
| | 419120 | Wholesale Trade Agents and Brokers | * | Wholesalers of books, periodicals |
| **Unallocated** | 451210 | Book Stores and News Dealers | | |
| | 541930 | Translation and Interpretation Services | * | Translation services only |
| | 711513 | Independent Writers and Authors | | |

## Audio-Visual and Interactive Media

### Table A.5 Audio-Visual and Interactive Media

| Subdomain | NAICS code | NAICS title | Partial | Notes |
|---|---|---|---|---|
| **Film and Video** | 414450 | Video Cassette Wholesalers | | |
| | 512110 | Motion Picture and Video Production | | |
| | 512120 | Motion Picture and Video Distribution | | |
| | 512130 | Motion Picture and Video Exhibition | | |
| | 512190 | Post-Production and Other Motion Picture and Video Industries | | |
| | 532230 | Video Tape and Disc Rental | | |
| **Broadcasting** | 515110 | Radio Broadcasting | | |
| | 515120 | Television Broadcasting | | |
| | 515210 | Pay and Specialty Television | | |
| | 517112 | Cable and Another Program Distribution | | |
| **Interactive Media** | 451120 | Hobby, Toy and Game Stores | * | Video game retail only |
| | 511210 | Software Publishers | * | Video game development only |

## Sound Recording

### Table A.6 Sound Recording

| Subdomain | NAICS code | NAICS title | Partial | Notes |
|---|---|---|---|---|
| **Sound Recording** | 414440 | Sound Recording Wholesalers | | |
| | 451220 | Pre-Recorded Tape, Compact Disc and Record Stores | | |
| | 512210 | Record Production | | |
| | 512220 | Integrated Record Production/Distribution | | |
| | 512240 | Sound Recording Studios | | |
| | 512290 | Other Sound Recording Industries | | |
| **Music Publishing** | 451140 | Musical Instrument and Supplies Stores | * | Establishments selling sheet music |
| | 512230 | Music Publishers | | |

 

# Appendix B: Detailed Employment Statistics

### Table B1: Employment Profile of Cultural Labour Force (2016 Census and 2011 Census)

| Domain | Subdomain | National Occupation Classification (NOC) code | NOC title | Employment | |
|---|---|---|---|---|---|
| | | | | 2011 | 2016 |
| Heritage and Libraries | Archives | 5113 | Archivists | 2,730 | 2,060 |
| | | 1253 | Records Management and Filing Clerks | 8,760 | 7,780 |
| | Libraries | 5111 | Librarians | 14,695 | 9,835 |
| | | 1213 | Supervisors, Library, Correspondence and Related Information Clerks | 7,055 | 4,850 |
| | | 1451 | Library Clerks | 20,560 | 19,075 |
| | Cultural Heritage | 5112 | Conservators and Curators | 2,035 | 2,175 |
| | | 5212 | Technical Support Occupations Related to Museums and Art Galleries | 8,270 | 9,070 |
| | Natural Heritage | 2224 | Conservation and Fishery Officers | 6,465 | 5,440 |
| | | 2221 | Biological Technologists and Technicians | 12,205 | 11,160 |
| | | 2223 | Forestry Technologists and Technicians | 8,860 | 7,780 |
| | Unallocated | 0511 | Library, Archive, Museum and Art Gallery Managers | 4,790 | 5,255 |
| | | 1451 | Library and Archive Technicians and Assistants | N/A | N/A |
| Live Performance | Performing Arts | 5131 | Producers, Directors, Choreographers and Related Occupations | 24,125 | 29,075 |
| | | 5133 | Musicians and Singers | 37,920 | 40,295 |
| | | 5134 | Dancers | 9,490 | 11,700 |
| | | 5135 | Actors and Comedians | 12,560 | 15,995 |
| | | 5232 | Other Performers | 5,770 | 8,395 |
| Live Performance | Festivals and Celebrations | 1226 | Conference and Event Planners | 24,940 | 27,540 |
| Visual and Applied Arts | Original Visual Art | 5136 | Painters, Sculptors and Other Visual Artists | 18,555 | 24,785 |
| | Photography | 5221 | Photographers | 18,250 | 21,030 |
| | | 9474 | Photographic and Film Processors | 5,895 | 2,725 |
| | Crafts | 5244 | Artisans and Craftspersons | 14,980 | 17,285 |

| | | | | | |
|---|---|---|---|---|---|
| | Advertising | 1123 | Professional occupations in advertising, marketing and public relations | 19,037 | 23,570 |
| | Architecture | 2151 | Architects | 16,685 | 18,080 |
| | | 2152 | Landscape Architects | 1,910 | 2,215 |
| | | 2153 | Urban and Land Use Planners | 11,660 | 13,205 |
| | | 0212 | Architecture and Science Managers | 8,095 | 9,295 |
| | | 2225 | Landscape and Horticultural Technicians and Specialists | 19,065 | 21,290 |
| | | 2251 | Architectural Technologists and Technicians | 10,150 | 11,325 |
| | | 2253 | Drafting Technologists and Technicians | 35,015 | 29,755 |
| | Design | 2175 | Web Designers and Developers | 25,960 | 29,020 |
| | | 2252 | Industrial Designers | 8,190 | 9,695 |
| | Design | 5241 | Graphic Designers and Illustrators | 61,060 | 66,875 |
| | | 5242 | Interior Designers | 25,535 | 28,025 |
| | | 5243 | Theatre, Fashion, Exhibit and Other Creative Designers | 13,725 | 16,175 |
| | | 5245 | Patternmakers – Textile, Leather and Fur Products | 1,095 | 1,120 |
| | | 5223 | Graphic Arts Technicians | 10,900 | 9,690 |
| Written and Published Works | Unallocated | 5121 | Authors and Writers | 28,385 | 31,110 |
| | | 5122 | Editors | 19,875 | 19,170 |
| | | 5123 | Journalists | 14,805 | 13,045 |
| | | 5125 | Translators, Terminologists and Interpreters | 19,805 | 19,950 |
| | | 1423 | Desktop Publishing Operators and Related Occupations | 2,325 | 1,805 |
| | | 7303 | Supervisors, Printing and Related Occupations | 4,675 | 3,110 |
| | | 7381 | Printing Press Operators | 16,025 | 17,825 |
| | | 9471 | Printing Machine Operators | 13,750 | 7,920 |
| | | 9472 | Camera, Platemaking and Other Pre-Press Occupations | 4,790 | 2,900 |
| | | 9473 | Binding and Finishing Machine Operators | 8,965 | 5,375 |
| | | 1452 | Correspondence, Publication and Related Clerks | 29,975 | 26,610 |
| Audio-visual and Interactive Media | Film and Video | 5222 | Film and Video Camera Operators | 4,890 | 5,755 |
| | Broadcasting | 5231 | Announcers and Other Broadcasters | 7,885 | 6,500 |

| | | | | | |
|---|---|---|---|---|---|
| | | 0015 | Senior Managers – Trade, Broadcasting and Other Services, N.E.C. | 644 | 655 |
| | | 5224 | Broadcast Technicians | 3,305 | 2,245 |
| | Interactive Media | 2174 | Computer Programmers and Interactive Media Developers | 6,690 | 6,925 |
| Sound Recording | | 5132 | Conductors, Composers and Arrangers | 3,685 | 4,550 |
| Multidomain | | 0512 | Managers –- Publishing, Motion Pictures, Broadcasting and Performing Arts | 11,775 | 8,185 |
| | | 5225 | Audio and Video Recording Technicians | 14,500 | 14,315 |
| | | 5226 | Other Technical Support and Co-Ordinating Occupations in Motion Pictures, Broadcasting and The Performing Arts | 11,230 | 15,875 |
| | | 5227 | Support Occupations in Motion Pictures, Broadcasting and The Performing Arts | 8,500 | 11,840 |

# Appendix C: Methodology for Forecast of Labour Supply and Demand for Cultural Occupations

To derive the projections for occupations in the cultural sector, we incorporated the Conference Board's most current long-term macroeconomic and industrial forecasts. The forecasts are generally closely aligned with those used by Employment and Social Development Canada to develop the Canadian Occupational Projection System (COPS). While our approach generates distinctive estimates for the expansion of demand, many of the associated published variables from the COPS are incorporated into the analysis. Specifically, these include rates of retirement, death, emigration, immigration, and school leaving (graduates and others who join the labour market). Given that our own estimates for the expansion of demand differ from those produced by COPS, the associated projections with occupational mobility are also unique.

The initial process aligned the GDP forecast by culture domain and subdomain with the most closely linked industry category from our long-term national forecast. The next step involved examining the historical relationship (based on Statistics Canada's Provincial and Territorial Culture Indicators) between output (revenues) and GDP to produce measures related to outputs (revenues). These forecasts were further adjusted based on trend performance and on the feedback received from industry consultations (including focus groups, online survey, and stakeholder interviews). Ultimately, the overall outputs (revenues) need to account for the total revenues of domains and subdomains stemming from all sources of funding including own-sales, government, exports, sponsorship, and other sources.

Once estimates of real GDP and real output were established, estimates of labour productivity were introduced to provide a forecast of employment. Labour productivity is measured simply as output (revenues) per worker, and the trend was based on the history provided by Statistics Canada's Provincial and Territorial Culture Indicators. Labour productivity in each domain and subdomain is projected to be influenced going forward by the overall trend labour productivity from the Conference Board's long-term economic forecast.

Table C.1 shows the reported average annual growth for the sector, domains, and subdomains over the 2012–2017 period and the projected average annual forecast for the 2017–2026 period.

## Table C.1

**Actual & Projected Potential Performance of the Cultural Sector** (annual growth in revenues)

| Domains | Subdomains | Average annual growth (2012–2017) | Average annual growth (2017–2026) |
|---|---|---|---|
| **Cultural Sector, all products and services** | | 1.6% | 1.7% |
| **Culture products and services only** | | 0.9% | 1.8% |
| **Heritage and libraries** | Total | 5.1% | 1.6% |
| | Archives | 1.9% | 2.3% |
| | Libraries | 4.0% | 3.4% |
| | Cultural heritage | 4.5% | 1.0% |
| | Natural heritage | 6.8% | 2.4% |
| **Live performance** | Total | 4.6% | 1.9% |
| | Performing arts | 4.7% | 1.9% |
| | Festivals and celebrations | 3.6% | 0.9% |
| **Visual and applied arts** | Total | 2.8% | 2.4% |
| | Original visual art | 4.9% | 2.8% |
| | Art reproductions | 1.4% | 1.9% |
| | Photography | 3.8% | 0.2% |
| | Crafts | -4.2% | 0.1% |
| | Advertising | 4.6% | 2.9% |
| | Architecture | -2.4% | -1.5% |
| | Design | 4.7% | 3.8% |
| **Written and published works** | Total | -4.2% | 0.8% |
| | Books | -7.0% | -1.4% |
| | Periodicals | -6.2% | -1.1% |
| | Newspapers | -10.5% | -4.6% |
| | Other published works | -5.6% | 1.1% |
| | Collected Information | -6.6% | -0.8% |
| | Multi-subdomain | 0.2% | 2.9% |
| **Audio-visual and interactive media** | Total | 2.3% | 1.8% |
| | Film and video | 5.1% | 2.1% |
| | Broadcasting | -0.3% | 1.2% |
| | Interactive media | 4.8% | 3.0% |
| **Sound recording** | Total | 3.0% | 2.1% |
| | Sound recording | 2.6% | 1.0% |
| | Music publishing | 3.1% | 2.3% |
| **Education and training** | | 1.9% | 1.3% |
| **Governance, funding, and professional support** | | 0.8% | 1.1% |
| **Multidomain*** | | 1.9% | 1.7% |
| **Other products and services** | | 4.4% | 1.5% |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain

Sources: The Conference Board of Canada; Statistics Canada's Provincial and Territorial Culture Indicators (2017).

To translate the projections of revenues into jobs, the analysis needed to consider the projections for labour productivity (calculated as revenues per job). Table C.2 shows the calculated average annual growth in productivity for the sector, domains, and subdomain over the 2012–2017 period and the projected average annual forecast in labour productivity for the 2017–2026 period.

## Table C.2

**Actual & Projected Labour Productivity of the Cultural Sector**
(annual growth in labour productivity, %)

| Domains | Subdomains | Average annual growth (2012–2017) | Average annual growth (2017–2026) |
|---|---|---|---|
| **Cultural Sector, all products and services** | | 0.1% | 0.9% |
| **Culture products and services only** | | -0.2% | 0.9% |
| **Heritage and libraries** | Total | -1.1% | -0.2% |
| | Archives | -3.8% | 0.4% |
| | Libraries | -4.5% | 0.5% |
| | Cultural heritage | -0.9% | -0.5% |
| | Natural heritage | -0.9% | 0.2% |
| **Live performance** | Total | -0.3% | 0.4% |
| | Performing arts | -0.3% | 0.4% |
| | Festivals and celebrations | -0.6% | -0.3% |
| **Visual and applied arts** | Total | 1.5% | 1.7% |
| | Original visual art | 1.6% | 1.7% |
| | Art reproductions | 1.0% | 1.3% |
| | Photography | 0.9% | 1.2% |
| | Crafts | -3.6% | -0.1% |
| | Advertising | 1.0% | 1.9% |
| | Architecture | -1.0% | -1.7% |
| | Design | 4.0% | 2.9% |
| **Written and published works** | Total | -0.7% | 1.2% |
| | Books | -4.1% | -0.9% |
| | Periodicals | -3.0% | -0.1% |
| | Newspapers | -3.7% | -2.2% |
| | Other published works | -2.0% | 0.7% |
| | Collected Information | -3.0% | -0.6% |
| | Multi-subdomain | 2.2% | 2.5% |
| **Audio-visual and interactive media** | Total | 0.0% | 0.3% |
| | Film and video | -0.6% | -0.6% |
| | Broadcasting | 2.4% | 2.7% |
| | Interactive media | 2.3% | 0.9% |
| **Sound recording** | Total | -1.1% | 1.1% |
| | Sound recording | 0.4% | 1.0% |
| | Music publishing | -1.6% | 1.0% |
| **Education and training** | | -0.8% | 0.2% |
| **Governance, funding, and professional support** | | 0.6% | 0.6% |
| **Multidomain*** | | -3.7% | -0.1% |
| **Other products and services** | | 0.7% | 0.7% |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain

Sources: The Conference Board of Canada; Statistics Canada's Provincial and Territorial Culture Indicators (2017).

While the process up to this stage results in generating labour demand projections at the domain and subdomain level, these projections do not immediately align with specific cultural occupations. Hence, a transformation was required to establish the degree to which projections of labour demand at a domain and subdomain level translate into projections at an occupational level. This transformation was required so that potential imbalances with the labour supply could be identified.

To do this transformation required a few key assumptions. The first is that the primary driver of labour demand for each cultural occupation (identified in the framework) will be the domain to which that occupation is assigned. To ensure that the resulting occupational projections incorporate (where applicable) the more specific labour demand projections at the subdomain level, further assumptions were required to distribute the share of workers by occupation across each of the subdomains in that domain. While efforts were made to provide a reasonable distribution of each occupation across subdomains, it should be recognized that this is an area where a human resource module would provide a more definitive distribution.

Based on this distribution across subdomains, Table C.3 shows the projected average annual growth in labour demand over the 2017–2026 period.

### Table C.3

**Projected Growth in Labour Demand of Cultural Occupations**
(annual growth in labour demand, %)

| Domains | Subdomains | 2017–2026 |
|---|---|---|
| **Cultural occupations, total** | | 0.9% |
| **Heritage and libraries** | Total | 2.6% |
| | Archivists | 2.3% |
| | Records management and filing clerks | 2.7% |
| | Librarians | 3.3% |
| | Supervisors, library, correspondence, and related information clerks | 3.0% |
| | Library clerks | 2.6% |
| | Conservators and curators | 2.0% |
| | Technical support occupations related to museums and art galleries | 1.6% |
| | Conservation and fishery officers | 2.5% |
| | Biological technologists and technicians | 2.5% |
| | Forestry technologists and technicians | 3.0% |
| | Library, archive, museum, and art gallery managers | 1.9% |
| **Live performance** | Producers, directors, choreographers, and related occupations | 1.4% |
| | Musicians and singers | 1.6% |
| | Dancers | 1.5% |
| | Actors and comedians | 1.5% |
| | Other performers | 1.6% |
| | Conference and event planners | 1.5% |
| | Painters, sculptors, and other visual artists | 1.1% |
| **Visual and applied arts** | Photographers | 0.7% |
| | Photographic and film processors | 1.1% |
| | Artisans and craftspersons | 0.3% |
| | Professional occupations in advertising, marketing, and public relations | -0.6% |
| | Architects | 0.5% |
| | Landscape architects | 0.9% |
| | Urban and land use planners | 0.7% |
| | Architecture and science managers | 0.5% |
| | Landscape and horticultural technicians and specialists | 0.5% |
| | Architectural technologists and technicians | 0.6% |
| | Drafting technologists and technicians | 0.6% |
| | Web designers and developers | 0.7% |
| | Industrial designers | 0.6% |
| | Graphic designers and illustrators | 0.8% |
| | Interior designers | 0.9% |
| | Theatre, fashion, exhibit, and other creative designers | 0.8% |
| | Patternmakers—textile, leather, and fur products | 0.9% |
| | Graphic arts technicians | 1.0% |
| | Authors and writers | 0.8% |

| | | |
|---|---|---|
| | Editors | 0.8% |
| **Written and published works** | Journalists | -0.9% |
| | Translators, terminologists, and interpreters | -0.1% |
| | Desktop publishing operators and related occupations | -0.1% |
| | Supervisors, printing, and related occupations | -0.4% |
| | Printing press operators | 0.4% |
| | Printing machine operators | -0.6% |
| | Camera, platemaking and other pre-press occupations | 0.5% |
| | Binding and finishing machine operators | -2.4% |
| | Correspondence, publication and related clerks | -2.3% |
| | Film and video camera operators | -2.2% |
| | Announcers and other broadcasters | -2.2% |
| | Senior managers—trade, broadcasting, and other services, not elsewhere classified | -2.4% |
| **Audio-visual and interactive media** | Broadcast technicians | 1.7% |
| | Computer programmers and interactive media developers | 2.3% |
| | Producers, directors, choreographers, and related occupations & conductors, composers, and arrangers | 1.4% |
| | Managers—publishing, motion pictures, broadcasting, and performing arts | 2.1% |
| | Audio and video recording technicians | -0.6% |
| | Other technical support and coordinating occupations in motion pictures, broadcasting, and the performing arts | 2.1% |
| **Sound recording** | Support occupations in motion pictures, broadcasting, and the performing arts | 1.0% |
| | Archivists | 1.0% |
| **Multidomain*** | Records management and filing clerks | 1.9% |
| | Librarians | 2.0% |
| | Supervisors, library, correspondence, and related information clerks | 1.9% |
| | Library clerks | 1.8% |
| | Conservators and curators | 1.8% |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain
Sources: The Conference Board of Canada; Statistics Canada's Provincial and Territorial Culture Indicators (2017).

To fully isolate any potential mismatches between the demand for labour and the supply of labour, all components of both demand and supply need to be exposed. The previous table focused purely on expansionary demand (or contractionary in the case where rates are negative). However, aside from this, businesses and self-employed individuals will look to fill vacant positions left from retirement, emigration, and other forms of attrition. In addition, positions will be available as individuals leave for occupations elsewhere in the economy. The positions that will need to be filled are referred to as "job openings." Employment and Social Development Canada has estimates of the total job openings that are expected for each occupation between 2017–2026 on its website.[52]

In terms of potential candidates to fill those positions, supply will come from school leavers, immigration, and mobility across other occupations. In aggregate, the potential supply of workers is referred to as "job applicants."

The aggregated components of labour demand amount to an estimate of the number of job openings that will be present in the 2017–2026 period. On the other hand, the aggregated components of labour supply reveal the number of applicants that are assumed to respond to the level of job openings. See Table C.4.

### Table C.4

**Projected Number of Job Openings and Job Applicants for Cultural Occupations, 2017–2026**
(based on 2017 level of employment in each occupation)

| Domains | Occupation | Job openings | Job applicants | Potential gap |
|---|---|---|---|---|
| **Heritage and libraries** | Archivists | 47.5% | 42.7% | 4.8% |
| | Records management and filing clerks | 56.5% | 54.7% | 1.8% |
| | Librarians | 56.9% | 51.3% | 5.7% |
| | Supervisors, library, correspondence, and related information clerks | 57.6% | 55.6% | 2.0% |
| | Library clerks | 57.6% | 56.1% | 1.5% |
| | Conservators and curators | 44.3% | 39.9% | 4.3% |
| | Technical support occupations related to museums and art galleries | 40.6% | 37.6% | 3.1% |
| | Conservation and fishery officers | 39.7% | 34.7% | 5.0% |
| | Biological technologists and technicians | 36.0% | 31.1% | 5.0% |
| | Forestry technologists and technicians | 39.7% | 27.7% | 12.0% |
| | Library, archive, museum, and art gallery managers | 51.9% | 47.5% | 4.4% |
| **Live performance** | Producers, directors, choreographers, and related occupations | 31.1% | 28.9% | 2.2% |
| | Musicians and singers | 41.3% | 35.2% | 6.1% |
| | Dancers | 41.3% | 35.2% | 6.1% |
| | Actors and comedians | 41.3% | 35.2% | 6.1% |
| | Other performers | 34.1% | 33.9% | 0.2% |
| | Conference and event planners | 42.9% | 43.0% | -0.1% |
| **Visual and applied arts** | Painters, sculptors, and other visual artists | 37.1% | 34.2% | 2.9% |
| | Photographers | 21.0% | 27.6% | -6.6% |
| | Photographic and film processors | 20.1% | 20.5% | -0.4% |
| | Artisans and craftspersons | 29.3% | 29.0% | 0.3% |

[52] Employment and Social Development Canada, "Canadian Occupational Projection System (COPS)."

| | | | | |
|---|---|---|---|---|
| | Professional occupations in advertising, marketing, and public relations | 27.6% | 30.3% | -2.6% |
| | Architects | 35.5% | 37.2% | -1.7% |
| | Landscape architects | 34.4% | 38.5% | -4.2% |
| | Urban and land use planners | 34.4% | 38.5% | -4.2% |
| | Architecture and science managers | 36.6% | 39.5% | -2.9% |
| | Landscape and horticultural technicians and specialists | 26.5% | 26.3% | 0.3% |
| | Architectural technologists and technicians | 30.8% | 31.7% | -0.8% |
| | Drafting technologists and technicians | 30.8% | 31.7% | -0.8% |
| | Web designers and developers | 20.6% | 22.2% | -1.6% |
| | Industrial designers | 33.3% | 32.7% | 0.6% |
| | Graphic designers and illustrators | 18.8% | 22.6% | -3.8% |
| | Interior designers | 30.5% | 31.9% | -1.3% |
| | Theatre, fashion, exhibit, and other creative designers | 32.4% | 30.5% | 2.0% |
| | Patternmakers—textile, leather, and fur products | 32.4% | 31.2% | 1.3% |
| | Graphic arts technicians | 19.7% | 23.0% | -3.3% |
| **Written and published works** | Authors and writers | 29.3% | 31.5% | -2.2% |
| | Editors | 29.2% | 31.4% | -2.2% |
| | Journalists | 26.4% | 29.5% | -3.1% |
| | Translators, terminologists, and interpreters | 39.5% | 39.8% | -0.3% |
| | Desktop publishing operators and related occupations | 26.4% | 27.1% | -0.7% |
| | Supervisors, printing, and related occupations | 34.6% | 37.0% | -2.4% |
| | Printing press operators | 8.9% | 9.9% | -1.1% |
| | Printing machine operators | 9.5% | 10.5% | -1.0% |
| | Camera, platemaking and other pre-press occupations | 9.5% | 10.5% | -1.0% |
| | Binding and finishing machine operators | 9.5% | 10.5% | -1.0% |
| | Correspondence, publication and related clerks | 17.4% | 18.4% | -1.0% |
| **Audio-visual and interactive media** | Film and video camera operators | 31.1% | 30.0% | 1.1% |
| | Announcers and other broadcasters | 33.0% | 33.4% | -0.3% |
| | Senior managers—trade, broadcasting, and other services, not elsewhere classified | 31.0% | 27.3% | 3.6% |
| | Broadcast technicians | 6.6% | 12.8% | -6.2% |
| | Computer programmers and interactive media developers | 36.3% | 35.7% | 0.6% |
| **Sound recording** | Producers, directors, choreographers, and related occupations & conductors, composers, and arrangers | 54.4% | 51.7% | 2.7% |
| **Multidomain*** | Managers—publishing, motion pictures, broadcasting, and performing arts | 27.0% | 27.2% | -0.1% |
| | Audio and video recording technicians | 27.0% | 27.2% | -0.1% |
| | Other technical support and coordinating occupations in motion pictures, broadcasting, and the performing arts | 27.0% | 27.2% | -0.1% |
| | Support occupations in motion pictures, broadcasting, and the performing arts | 54.4% | 51.7% | 2.7% |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain

Sources: The Conference Board of Canada; Statistics Canada's Provincial and Territorial Culture Indicators (2017).

Table C.4 was compiled by using our estimates for the expansion of demand along with our own estimates for occupational mobility. The rest of the components for job openings and job applicants were taken directly from the Employment and Social Development Canada's COPS tables. A regression analysis was conducted to understand how the COPS projections of occupational mobility are correlated with the expansion of demand. Perhaps not surprisingly (holding everything else constant), the two are closely linked. In fact, the coefficient of correlation was 0.94. Hence if the expansion of demand for an occupation was 10 per cent stronger than for another occupation (all other things being equal), the occupational mobility would be 9.4 per cent stronger.

This is important because while we had assumed all of the other components of the COPS projections would remain stable (despite a different expansion demand projection), we recognized that the degree to which an occupation with stronger growth might appeal to other applicants would change. However, rather than assume the relationship was 1:1 (as the overall regression might suggest for all occupations), the ability to recruit from other occupations could be limited by the specific nature of work. Various assumptions were made to reflect the likely ability to recruit from other occupations. Table C.5 shows the occupational flexibility to recruit from other occupations. An occupational flexibility figure of 100 per cent indicates that if demand were to increase by 10 per cent (over the base case), it is likely that there would be ample available resources to find 10 per cent more qualified applicants (based on specific skills).

### Table C.5

**Estimated Occupational Flexibility for Cultural Occupations**

(ability to recruit more workers if demand were to change)

| Domains | Occupation | Occupational flexibility |
|---|---|---|
| **Heritage and libraries** | Archivists | 50% |
| | Records management and filing clerks | 100% |
| | Librarians | 75% |
| | Supervisors, library, correspondence, and related information clerks | 100% |
| | Library clerks | 100% |
| | Conservators and curators | 25% |
| | Technical support occupations related to museums and art galleries | 25% |
| | Conservation and fishery officers | 75% |
| | Biological technologists and technicians | 35% |
| | Forestry technologists and technicians | 35% |
| | Library, archive, museum, and art gallery managers | 75% |
| **Live performance** | Producers, directors, choreographers, and related occupations | 25% |
| | Musicians and singers | 25% |
| | Dancers | 25% |
| | Actors and comedians | 25% |
| | Other performers | 50% |
| | Conference and event planners | 75% |
| **Visual and applied arts** | Painters, sculptors, and other visual artists | 25% |
| | Photographers | 25% |
| | Photographic and film processors | 100% |
| | Artisans and craftspersons | 10% |
| | Professional occupations in advertising, marketing, and public relations | 75% |
| | Architects | 75% |
| | Landscape architects | 25% |
| | Urban and land use planners | 25% |
| | Architecture and science managers | 50% |
| | Landscape and horticultural technicians and specialists | 100% |
| | Architectural technologists and technicians | 25% |
| | Drafting technologists and technicians | 25% |
| | Web designers and developers | 100% |
| | Industrial designers | 50% |
| | Graphic designers and illustrators | 50% |
| | Interior designers | 75% |
| | Theatre, fashion, exhibit, and other creative designers | 50% |
| | Patternmakers—textile, leather, and fur products | 75% |
| | Graphic arts technicians | 50% |

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|---|---|---|
| **Written and published works** | Authors and writers | 75% |
| | Editors | 75% |
| | Journalists | 75% |
| | Translators, terminologists, and interpreters | 75% |
| | Desktop publishing operators and related occupations | 100% |
| | Supervisors, printing, and related occupations | 75% |
| | Printing press operators | 100% |
| | Printing machine operators | 100% |
| | Camera, platemaking and other pre-press occupations | 100% |
| | Binding and finishing machine operators | 100% |
| | Correspondence, publication and related clerks | 100% |
| **Audio-visual and interactive media** | Film and video camera operators | 75% |
| | Announcers and other broadcasters | 50% |
| | Senior managers—trade, broadcasting, and other services, not elsewhere classified | 75% |
| | Broadcast technicians | 75% |
| | Computer programmers and interactive media developers | 25% |
| **Sound recording** | Producers, directors, choreographers, and related occupations & conductors, composers, and arrangers | 25% |
| **Multidomain*** | Managers—publishing, motion pictures, broadcasting, and performing arts | 25% |
| | Audio and video recording technicians | 25% |
| | Other technical support and coordinating occupations in motion pictures, broadcasting, and the performing arts | 25% |
| | Support occupations in motion pictures, broadcasting, and the performing arts | 25% |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain
Sources: The Conference Board of Canada; Statistics Canada's Provincial and Territorial Culture Indicators (2017).

While Table C.5 provides a snapshot of the degree to which there may be potential mismatches ("gaps") between labour demand and labour supply in the economy for each occupation, the issue of self-employment is not directly accounted for. In particular, it was assumed that the concept of "shortages" does not apply for the proportion of workers in each occupation who are self-employed. In fact, as we heard during the focus groups, it could be the case that the self-employed proportion represent a surplus of workers (to some degree). This is a sentiment that was heard often during the focus groups. Focus group participants said average earnings are often very low because there are too many people for the marketplace to support fully.

To identify the proportion of the labour market where shortages could still exist, our approach considered not only the share of each occupation that was self-employed but also the degree to which those self-employed workers might be result in a labour surplus (among self-employed workers). Hence, if there was a situation whereby an employer required more workers, then self-employed workers would fill some (or all) that demand. The degree to which self-employed workers were viewed as contributing to a labour surplus was estimated to reflect the percentage difference among average wages of self-employed individuals to individuals not self-employed. Table C.6 shows the percentage of workers in each occupation who are self-employed and the share of the average wage of self-employed individuals relative to workers who are not self-employed. Given that there are many reasons why individuals choose to be self-employed (beyond not having opportunities to work for an employer), the formula to reflect oversupply from the average wage disparity (between self-employed workers and non-self-employed workers) was adjusted by 50 per cent. For instance, if self-employed workers received 80 per cent of the wage of non-self-employed individuals then it was assumed that there was a 10 per cent surplus of labour (rather than a 20 per cent surplus).

**Table C.6**

**Self-Employment in Cultural Occupations**

(percentage of workers in each occupation)

| Domains | Occupation | Self-employed rate | Self-employed wage (% of non-self employed) |
|---|---|---|---|
| **Heritage and libraries** | Archivists | 0% | n.a. |
| | Records management and filing clerks | 2% | 61% |
| | Librarians | n.a. | 59% |
| | Supervisors, library, correspondence, and related information clerks | 1% | 25% |
| | Library clerks | 0% | n.a. |
| | Conservators and curators | 13% | 50% |
| | Technical support occupations related to museums and art galleries | 10% | 38% |
| | Conservation and fishery officers | 0% | n.a. |
| | Biological technologists and technicians | 4% | 45% |
| | Forestry technologists and technicians | 7% | 55% |
| | Library, archive, museum, and art gallery managers | 9% | 53% |
| **Live performance** | Producers, directors, choreographers, and related occupations | 38% | 75% |
| | Musicians and singers | 61% | 84% |
| | Dancers | 36% | 64% |
| | Actors and comedians | 44% | 56% |
| | Other performers | 47% | 71% |
| | Conference and event planners | 17% | 52% |
| **Visual and applied arts** | Painters, sculptors, and other visual artists | 67% | 64% |
| | Photographers | 70% | 59% |
| | Photographic and film processors | 13% | 66% |
| | Artisans and craftspersons | 59% | 60% |
| | Professional occupations in advertising, marketing, and public relations | 59% | 59% |
| | Architects | 29% | 67% |
| | Landscape architects | 27% | 60% |
| | Urban and land use planners | 9% | 62% |
| | Architecture and science managers | 6% | 74% |
| | Landscape and horticultural technicians and specialists | 23% | 49% |
| | Architectural technologists and technicians | 16% | 61% |
| | Drafting technologists and technicians | 10% | 65% |
| | Web designers and developers | 28% | 54% |
| | Industrial designers | 20% | 59% |
| | Graphic designers and illustrators | 31% | 62% |
| | Interior designers | 40% | 61% |

| | | | |
|---|---|---|---|
| | Theatre, fashion, exhibit, and other creative designers | 34% | 65% |
| | Patternmakers—textile, leather, and fur products | 23% | 42% |
| | Graphic arts technicians | 19% | 59% |
| **Written and published works** | Authors and writers | 51% | 53% |
| | Editors | 30% | 50% |
| | Journalists | 17% | 67% |
| | Translators, terminologists, and interpreters | 41% | 45% |
| | Desktop publishing operators and related occupations | 14% | 73% |
| | Supervisors, printing, and related occupations | 9% | 81% |
| | Printing press operators | 7% | 70% |
| | Printing machine operators | 5% | 65% |
| | Camera, platemaking and other pre-press occupations | 4% | 65% |
| | Binding and finishing machine operators | 4% | 57% |
| | Correspondence, publication and related clerks | 4% | 58% |
| **Audio-visual and interactive media** | Film and video camera operators | 33% | 73% |
| | Announcers and other broadcasters | 17% | 77% |
| | Senior managers—trade, broadcasting, and other services, not elsewhere classified | 40% | 96% |
| | Broadcast technicians | 5% | 72% |
| | Computer programmers and interactive media developers | 10% | 58% |
| **Sound recording** | Producers, directors, choreographers and related occupations & conductors, composers and arrangers | 54% | 68% |
| **Multidomain*** | Managers—publishing, motion pictures, broadcasting, and performing arts | 22% | 72% |
| | Audio and video recording technicians | 28% | 71% |
| | Other technical support and coordinating occupations in motion pictures, broadcasting, and the performing arts | 13% | 69% |
| | Support occupations in motion pictures, broadcasting, and the performing arts | 12% | 72% |

* includes culture industries that affect more than one culture domain and cannot easily be allocated to a single domain
Sources: The Conference Board of Canada; Statistics Canada's Provincial and Territorial Culture Indicators (2017).

To establish the relative performance of the domains and subdomains at the provincial level, we downloaded data from Statistics Canada's Provincial and Territorial Culture Indicators on jobs, GDP, and output (revenues). The estimates of GDP and output were then deflated (using consumer prices) to approximate real values (in 2012 dollars). Based on The Conference Board of Canada's long-term provincial forecast for information and cultural industries and for arts, entertainment, and recreation industries, job growth estimates were determined for the six core cultural domains in each province for the years 2017–2026. All the domains, with the exception of live performance, were benchmarked to the performance of information and cultural industries, while live performance was benchmarked to the performance of arts, entertainment and recreation industries.

The first component of the provincial forecast determines estimates of performance for the cultural sector using the measures of jobs, GDP and output (revenues). These estimates are then used (as in the national forecast) as inputs into the analysis for labour demand and supply of cultural occupations at the provincial level. The same assumptions are used to determine the transformation at the provincial level as that used in the national forecast process—namely, that the primary driver of labour demand for each cultural occupation (identified in the framework) is assumed to be the domain to which each cultural occupation is assigned. In addition, the distribution of workers by occupation across each of the subdomains is the same distribution that exists at a national level. Once again, while efforts were made to ensure that this yields a reasonable distribution of each occupation across subdomains, it should be recognized that this is an area where a human resource module would provide a more definitive distribution. In this case, the human resource module would require provincial and territorial breakdowns of data.