2022 CREATIVE CITY SUMMIT
WATERLOO, ON

ADVOCATING FOR THE ARTS: **MEASURING IMPACT**

October 6th, 2022

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AGENDA

Presenter: Louisa Plant, Manager at Nordicity

1. **About** Nordicity

2. **How** is the sector measuring impact?

3. **Case study:** Impact Assessment of Arts and Culture on Vancouver Island & the Gulf Islands

4. **Looking ahead:** What we've learned, future approaches

5. **Q&A** with Kera McHugh, Steering Committee Member at Creative Coast

6. **Discussion:** What's next for measuring impact?

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ABOUT NORDICITY

Nordicity is a leading consulting firm specializing in policy, strategy, and economic analysis in the arts and culture sector and creative industries. Nordicity leads **arts impact studies and cultural planning** for a variety of clients, locally and globally.

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Global firm with associates around the world and offices in:
Vancouver | **Toronto** | **London** (UK)

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HOW IS THE SECTOR MEASURING IMPACT?

SOME CHALLENGES

- **Defining what** the sector is - relates to the comparability of data
- **Defining who** is part of the sector - relates to the accuracy of data
- Assessing **intangible** impacts
- Avoiding **duplication**

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CANADIAN APPROACHES – ECONOMIC IMPACT

Canadian Framework for Culture Statistics

- Developed 2011 by StatCan + Canadian Heritage
- Standard concepts, definitions and classifications for consistent, comparable stats

Culture Satellite Account (Statistics Canada)

- Measures economic output, GDP, employment of culture (incl. arts, heritage, sport)
- Uses NAICS & NOC codes in line with Canadian Framework for Culture Stats

Culture Statistics Strategy (StatCan, Canadian Heritage, CCNC + partners)

- Extension of CSA – data on direct economic importance of culture at provincial level
- Indicators = culture GDP, jobs, tax rev., trade + indicators for sports & cultural tourism
- Municipal culture indicators to estimate local culture and sport GDP and jobs

Challenge = not capturing all arts & culture workers, like part-time artists

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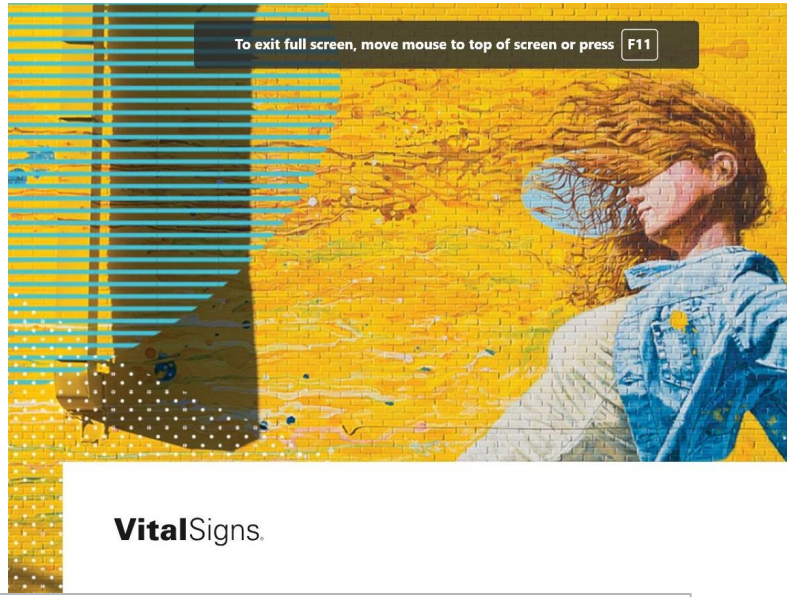
CANADIAN APPROACHES – SOCIAL IMPACT

VitalSigns: Community-driven data program measuring community vitality to mobilize action and improve quality of life

- Led by Community Foundations of Canada
- Arts & culture = one theme
- Aligned with UN SDGs since 2017

Arts' Civic Impact (in progress)

- Collaboration between Mass Culture, CCA, Culture Statistics Working Group, Ontario Trillium Foundation, and Toronto Arts Foundation + researchers from 5 universities
- 4 pillars: Health and Wellbeing, Indigenous Cultural Knowledge, Diversity and Inclusion, Climate and Sustainability



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INTERNATIONAL APPROACHES – SOCIAL IMPACT

UN Sustainable Development Goals (SDGs)

- Globally recognized blueprint for positive impact worldwide
- Not arts & culture specific

UNESCO Culture 2030 Indicators

- Culture's contribution to SDGs at country and city level
- 4 dimensions: Environment & Resilience, Prosperity & Livelihoods, Knowledge & Skills, Inclusion & Participation

UN Declaration on the Rights of Indigenous Peoples (UNDRIP)

- Assets rights of Indigenous People to maintain, control & protect their cultural heritage

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IMPORTANT QUESTIONS TO ASK

Before collecting data, ensure you're clear on:

- **What** you're measuring (e.g., definition of the sector, geographical boundaries, etc.)
- **Why** you're measuring it - what the underlying purpose/ambition?
- **Who** is the primary audience/user of the data? (And are they the same or not?)
- **How** will the data be used once you've gathered it?

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CASE STUDY:
ARTS IMPACT ASSESSMENT OF VANCOUVER ISLAND SUPER REGION

BACKGROUND

- Digital Innovation Group (DIG, now Creative Coast) came together to tackle issue of data

- Impact assessment **to tell a compelling story** about the arts and culture sector's wide impact in the super region
  - E.g., art ecosystem's impact on artists, communities, tourism sector, economy
  - Users = arts councils
  - Audiences = policymakers + public

- Social impact plus economic impact - direct, indirect, induced

See the report here

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DEFINING THE 'WHAT': SECTOR

Using the Canadian Framework for Culture Statistics cultural class classifications

Heritage and Archives

Live Performance

Visual and Applied Arts

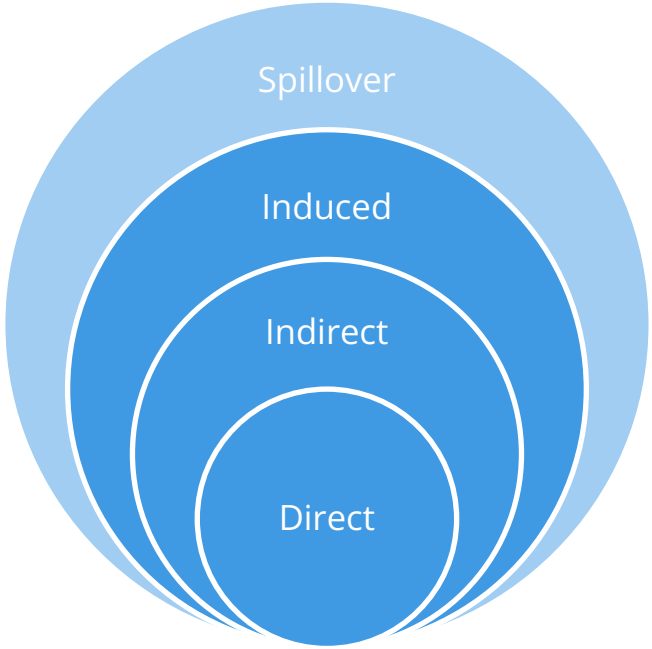
Written & Published Works

AV and Interactive

Sound & Music Publishing

DEFINING THE 'WHAT': ECONOMIC IMPACT

- **Direct, indirect and induced -** considering spillovers (e.g., cultural tourism impact)
- **2019 economic data** collected through the survey – more complete and unimpacted from COVID (i.e., the most accurate picture).



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DEFINING THE 'WHAT': SOCIAL & COMMUNITY IMPACTS

Considering **non-economic impacts** using Matarasso's thematic framework:

Community Empower-ment

Imagination & Vision

Local Image & Identity

Personal Development

Social Cohesion

Health & Wellbeing

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HOW: METHODS

Desk research including into ‘universe’ of the number of arts and culture organizations

Survey with 1,500 responses

Interviews + focus groups

Online events - kick off and sharing findings

Economic Impact Assessment

- Gross-up analysis for direct economic impact
- BC Stats Input/Output Model to calculate indirect and induced economic impact

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RESULTS

WIDE-RANGING ARTS PARTICIPATION

- **77% interact with digital content** and **68% create art** several times a week or more
- **Working, volunteering or collaborating** with cultural organizations
- **69%** indicated that they attend arts and culture **events more than once a month**

On average, respondents indicated spending roughly **$300 per year on consuming art and culture** in the region

ECONOMIC PROFILE + IMPACTS

ECONOMIC IMPACT

Through more than **$900 million** in direct economic activity, Vancouver Island & the Gulf Islands' arts and culture sector contributes **$675 million in GDP** and supports more than **20,000 jobs** (FTEs).

	Organizations	Artists	Tourism	Total
Direct Output ($M)	174	401	335	**910**
Total GDP ($M)	162	322	192	**676**
Total Employment (FTEs)	3,260	15,630	3,030	**21,920**
Total Labour Income ($M)	139	249	138	**526**

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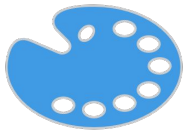
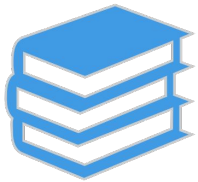
TOTAL DIRECT OUTPUTS COMPARED TO OTHER INDUSTRIES



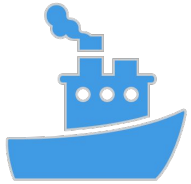
$900 Million

Islands/ Coast Arts and Culture



$624 Million

Vancouver Island University



$124 Million

Victoria Cruise Ship Economy

$32 Million

Regional Dairy Industry

The arts also support ~35% more jobs than the region's forestry sector

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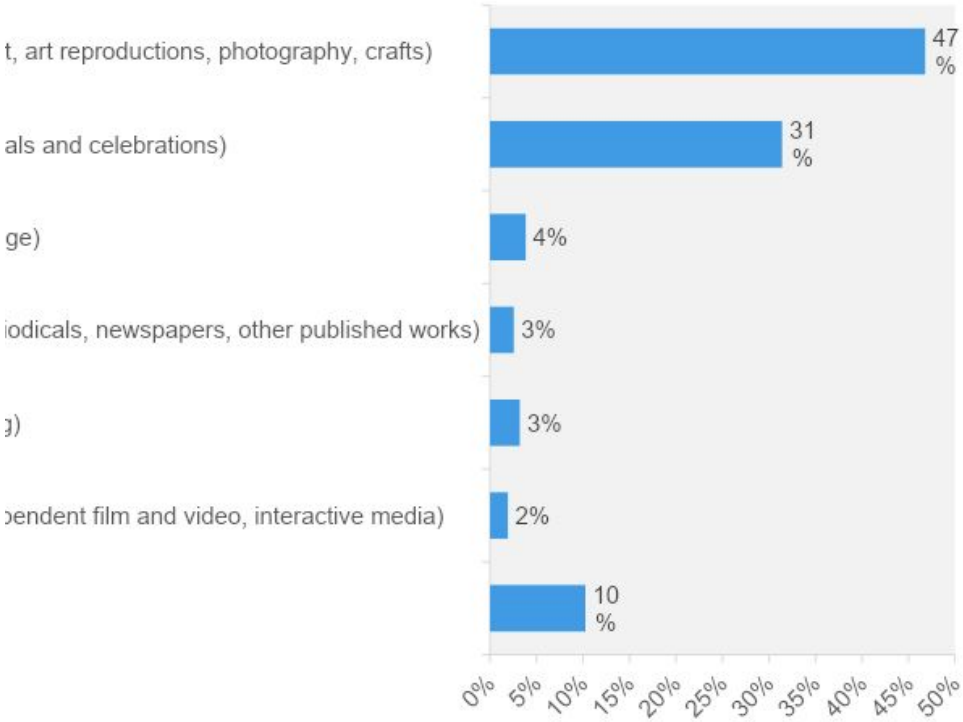
CULTURAL ORGANIZATION PROFILE

- More than 1,100 organizations identified through the survey and online databases
- Average revenue: ~$147k
- Average expenditures: ~$141k
  - Over 90% spent within the region
- Engaged more than 40 volunteers on average
  - Using an average of 120 hours per year and average hourly wage for arts workers, this contribution can be **valued at $115 million**



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ARTIST PROFILE

- More than **35k artists** estimated in the region, with nearly **three quarters practicing visual arts**

- More than **20k artists (nearly 60%) are revenue generating:**
  - Average income: ~$18k
  - Average expenses ~$14k

	Estimated # of Artists	Artist Population Breakdown	Regional Concentration Ratio
Revenue Generating Artists	22,700	61%	3%
Non-revenue generating	14,500	39%	2%
Total	**37,200**	**100%**	**5%**

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CULTURAL TOURISM PROFILE

- Roughly **three quarters** of organizations with audiences indicated welcoming **visitors from outside of the region**

- While there was a wide range, organizations hosted an **average of 2,000 visitors** from outside the region in 2019

Arts and Culture Tourists Spend More and Stay Longer

Cultural tourism is one of the **largest and fastest growing tourism markets** and research shows the arts and culture travelers:

- Spend more than other travelers.
- Are more likely to spend $1,000 or more during their stay.
- Stay longer than other travelers

Source: Americans for the Arts

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LOCAL BUSINESS SPENDING

- **91%** indicated that they **spend money at local businesses** before/after cultural events
- On average, individuals reported spending more than **$60 before/after participating** in a single cultural event
- Based on organizational audience estimates, this resulted in approximately **$400 million spent at local businesses**
- Strong agreement from business owners that the local arts sector makes the community a **better place to do business**

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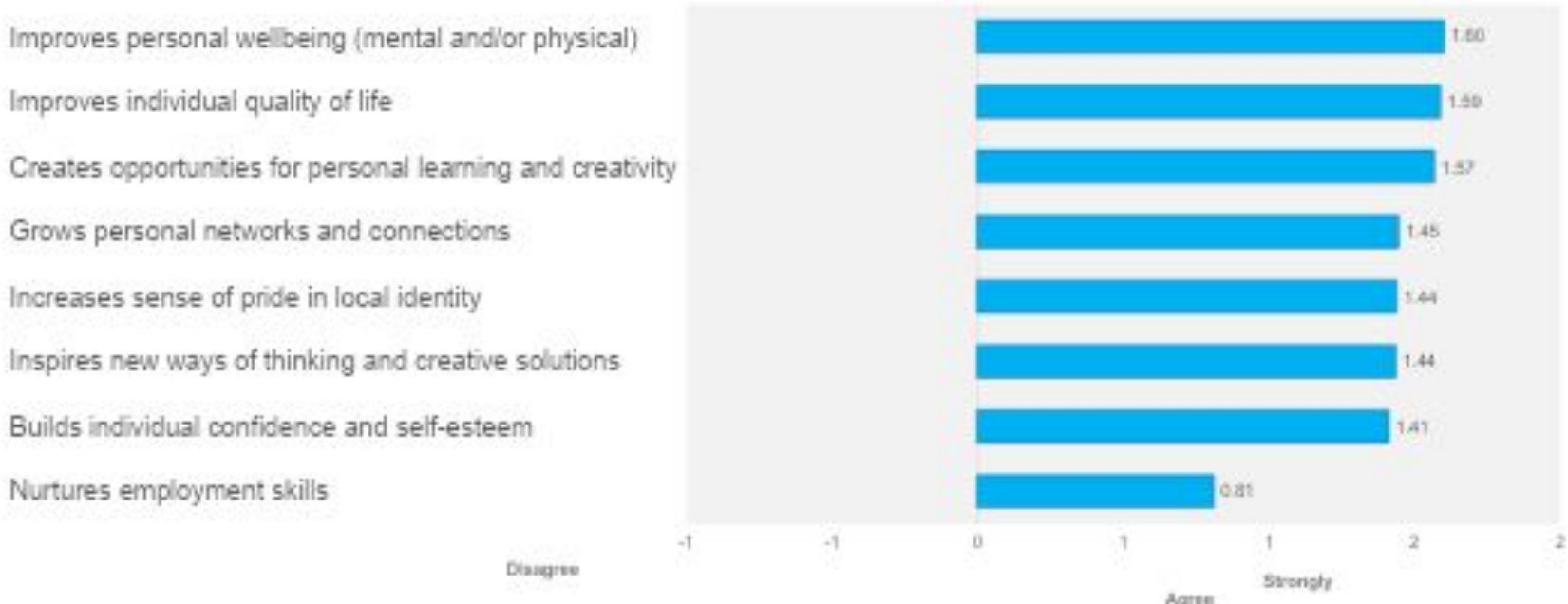
SOCIAL + COMMUNITY IMPACTS

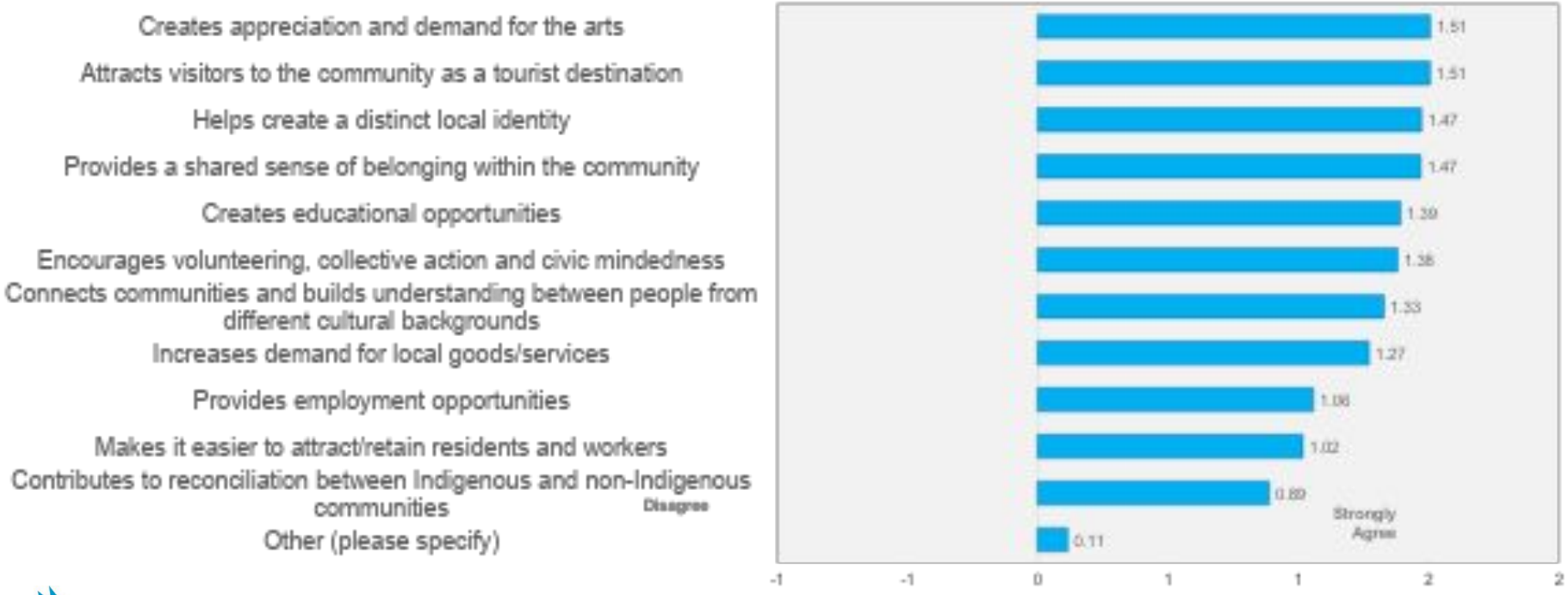
SOCIAL IMPACTS

- 97% agreed their local arts sector improves individual quality of life and wellbeing
- Strong agreement with most impact statements - also agreement with ‘nurtures employment skills’ but less strong



COMMUNITY IMPACTS

- Almost unanimous agreement with multiple community impact statements



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SOCIAL AND COMMUNITY IMPACTS

Community Empowerment:
Dynamic partnerships; high levels of volunteering

Imagination & Vision:
New ways of thinking and creative solutions

Local Image & Identity:
94% agreed the local sector creates distinct local identity

Personal Development:
Almost unanimous agreement that the local arts sector creates these opportunities

Social Cohesion:
95% said creates shared sense of belonging

Health & Wellbeing:
97% agreed improves personal wellbeing

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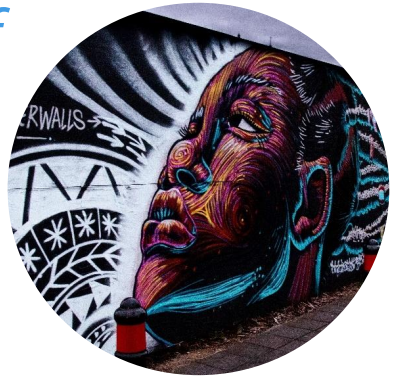
SOCIAL AND COMMUNITY IMPACTS

"Art expands the minds of people and makes life more vibrant"

- Interview Participant



LOOKING AHEAD

THINGS WE'VE LEARNED

- Helpful to articulate from outset why a framework is/is not used and **clearly present limitations** of each approach
- Need to ensure that partners **build capacity** within the project so they can conduct more of the analysis themselves ongoing
- Need to plan outreach with **underrepresented groups** from the very beginning and allow enough time
- **More standardization** around frameworks
- Need for a more accurate way of **estimating artist numbers** to avoid ongoing underestimation of sector impact

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THINGS WE'RE DOING NOW

- **Advocating** for the importance of arts & culture in SDGs
  - Missing Pillar report
  - Linking Matarasso with SDGs + Vital Signs

- Staying on top of **different measurement approaches** in the sector - considering how/where they fit; what is 'good evidence'

- Researching **other ways of measuring impact**, e.g., contingent valuation, impact of overseas cultural work on trade

Matarasso dimension	SDGs
Health and Wellbeing	
Local Image and Identity	
Community Empowerment	
Personal Development	
Imagination and Vision	
Social Cohesion	

ABOUT CREATIVE COAST

Presenter: Kera McHugh, Steering Committee, CC

A growing group of Vancouver Island + coastal creatives dreaming of an arts + culture super region

[Creative Coast] (formerly known as Digital Innovation Group) is a **collaboration lab** of artists and arts organizations in the Vancouver Island region, BC.

- Collectively growing creative practice, audiences and impact.
- Building capacity within the arts sector, and growing data literacy.
- Advocating for data literacy, joining up the dots, and removing siloes.

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CREATIVE COAST

Presenter: Kera McHugh, Steering Committee, Creative Coast

+ Pluses

- Demonstrates arts and culture is a key driver in Vancouver Island & Gulf Islands economy
- Opened doors to new strategic conversations - e.g., tourism, economic development

- Minuses

- Survey only reached part of the sector
- No real capacity at community level to gather/measure own data ongoing
- No funding for data literacy
- Lack of coordinated efforts/standard practices to build this capacity

Some next steps

- Monthly meetups with similar organizations - data competency top concern
- Proposals for data competency projects with Creative Manitoba, SFU
- Advocating for a cultural coordinator in each community
- Potentially developing future ‘arts friendly cities’ standard

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Q & A

DISCUSSION

DISCUSSION QUESTIONS

- What are the main reasons you would seek to measure impact in your community (the ‘why’)?
- Which indicators are most useful - and why?
- Given that we have these tools for collecting data on impact, what’s next?
- How should findings be used to grow the arts and culture sector and enhance quality of life in communities across Canada?

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THANK YOU

QUESTIONS? PLEASE CONTACT:

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