MakingItWork

Pathways toward sustainable cultural careers

May 2019

WorkInCulture

Prepared by:
Nordicity

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Message from WorkInCulture’s Chair and Executive Director

WorkInCulture is very pleased to present, *MakingItWork: Pathways Toward Sustainable Cultural Careers* – an in-depth labour market study of Ontario’s arts, cultural industries, museums, heritage and library sectors.

Through MakingItWork, we now know more about the over 274,000 Ontarians across the province who are employed in the cultural sector. We have a better sense of what their careers currently look like, their future goals and what skills they need to get to the next level. And, importantly, we also know more about what WorkInCulture and others can do to help them get there.

We know that MakingItWork’s success was driven by the passion, creativity and perseverance of the people who work across the creative community, like the 1,000+ individuals who responded to our survey, and the 127 people who attended roundtables in their communities. We thank you for contributing to the success of MakingItWork!

We would like to highlight the key contributions of WorkInCulture’s staff, Board of Directors, Research Planning Committee and our network of regional champions, as well as the team at Nordicity. This project was supported by the Government of Ontario.

Our next steps are to share MakingItWork broadly and to work with you, our community, to bring its recommendations to life.

Sincerely,

Diane Davy
Executive Director, WorkInCulture

K. Edwards

Kate Edwards
Chair, Board of Directors, WorkInCulture
Executive Director, Association of Canadian Publishers

Acknowledgements

Ontario

Funding for this report was provided by the Government of Ontario. Any opinions, findings, conclusions, or recommendations expressed in this material are those of the authors and do not necessarily reflect the views of the Government of Ontario. The Government of Ontario is in no way bound by the recommendations contained in this document.

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MakingItWork: Pathways Toward Sustainable Cultural Careers ("MakingItWork") looks beyond surface-level characterizations of cultural work. This report profiles today's culture sector labour market and identifies the challenges it is facing from evolving skills needs to the precariousness of the gig economy.

Ontario's economy benefits enormously from the nearly **275,000** employees and independent workers – full and part-time – who constitute the province's cultural workforce. The culture sector is an important anchor in the Ontario economy. It continues to fuel innovation and entrepreneurship, create jobs and imbue resilience into the economy as it embraces connections and is resistant to automation. To make sure that these benefits are fully realized, however, the sector requires current and credible labour market information (LMI).

Creating an LMI profile is challenging in view of constantly evolving demands, the lack of consistency in category definitions, and outdated employment classification models. To meet these methodological challenges, MakingItWork proposes a structure for measurement derived from the most recent Statistics Canada Census and industry classification approaches. MakingItWork profiles the sector along the lines of this new structure, and thus establishes a baseline of employment activity for future longitudinal analysis.

In the course of creating an LMI profile, this report also accomplishes three other objectives. MakingItWork:

(i) identifies gaps and barriers in skills development and training needs and recommends ways to address them;

(ii) provides WorkInCulture and its stakeholders with a better understanding of the issues facing the cultural workforce; and

(iii) recommends ways to improve the effectiveness of support programs and initiatives.

Defining the Culture Sector

In this report, the Culture Sector includes four subsectors: 1) Arts; 2) Cultural Industries; 3) Museums and Heritage and 4) Libraries. In turn, each subsector includes various specializations or disciplines as shown in the table below.

Table 1 Culture Sector Subsectors and Specializations

Culture Sector	Subsectors and Specializations			
Subsector	**Arts**	**The Cultural Industries**	**Libraries**	**Museums & Heritage**
Specializations	Visual Arts & Crafts Dance, Music, Theatre Literary Arts	Digital Media Design & Advertising Film & Television Book & Magazine Publishing Music Recording & Publishing	Libraries	Museums Archives

Approach and Methodology

The approach for undertaking MakingItWork combined qualitative and quantitative data methods. The qualitative draws mainly on the results of 10 **cross-sectoral roundtables** held across the province. The quantitative results of this research are based on analysis of two data sources, 1) a **survey** of artists, culture sector workers, organizations, companies and institutions that received over 1000 responses and 2) a **custom tabulation of data** extracted from Statistics Canada's 2016 Census of Population.

In order to extract information about workers in the culture sector, Nordicity's custom analysis relies on statistical classifications of occupations (National Occupational Classifications, or NOCs) and industry sectors (North American Industry Classification System, or NAICS). Moreover, this work focuses on the set of occupations and industries that are identified as being part of the culture sector in the Canadian Framework for Culture Statistics (CFCS). It is important to note that this approach differs from Statistics Canada's Culture Satellite Account (CSA), which primarily relies on product and industry sector classifications.

A note to readers regarding Nordicity's custom approach

For MakingItWork, Nordicity used the Canadian Framework for Culture Statistics' (CFCS) definitions of occupations and industry sectors to filter census data for workers who are employed in the culture sector. From that source (Statistics Canada's *2016 Census of Population*), the report extracts demographic and income information. Though CFCS *was* used as a key source of information to inform this methodology, the subsectors and specializations used in this report *do not* correspond exactly to domains and subdomains in CFCS. Two limitations to draw readers' attention to:

1. **The information drawn from census data relies on workers' primary occupation and industry as reported in the census** and so does not capture casual culture workers or those for whom culture is a secondary source of employment or income
2. **Industrial classifications in census data are only available at the four-digit level of NAICS codes creating some classification challenges**: e.g., NAICS classifications at the four-digit level provide information about NAICS 5112 "Software publishers," but do not distinguish video game publishers until the six-digit level (NAICS 511212 "Video game publishers"). This report includes the broader software publishing industry as part of the Digital Media specialization. As such our data *does not* map directly to **The Provincial and Territorial Culture Indicators**

For a detailed description of precisely how this report maps NAICS and NOCs codes for each culture subsector and extracts the census data presented in this report, please see Appendix D. In Appendices E and F readers will find the full lists of the NAICS and NOCs codes which were associated with each subsector and specialization, as presented in this report.

Ontario's Culture Sector Profile

Based on an analysis of a custom data tabulation from Statistics Canada's 2016 Census, Nordicity estimates that there are **274,220** individual workers working full or part-time in Ontario's Culture Sector. In combination with the survey responses received from artists and culture sector workers, we can observe that the sector is:

- **Younger (slightly) and more concentrated in large urban centres** than the overall workforce in Ontario.
- **Populated by slightly more men than women**: Women are slightly less prevalent in the culture sector workforce (44%) than in Ontario's workforce overall (48%). A sector exception is in libraries where some 84% of the workforce are women.
- **Highly-educated**: Four in five (81%) culture sector workers hold at least some kind of post-secondary credential compared to about two in three (65%) workers in Ontario overall.
- **Relatively inclusive of newcomers to Canada, but not especially diverse**: Overall, the culture workforce has 38% more newcomers than Ontario's overall workforce, but that share is of a very small base (5.4% compared to 3.9% in Ontario overall). Importantly, the culture sector is not any more diverse than the province's workforce: participation of persons of colour/members of visible minorities, as well as people who identify as Indigenous, slightly lag the provincial average.
- **Predominantly English-speaking**: Culture sector workers are more likely to speak English at home than workers in Ontario in all sectors.
- **Earning an average $42,500 per year from arts-related activities**, though this annual average drops to $34,200 when those working in the cultural industries are excluded from the sample.
- **Earning approximately 80% of their total annual income from arts-related activities**.
- **Seeking sustainability:** The three most critical issues facing culture sector workers, as cited by survey respondents, were 1) salary/low income; 2) lack of work/life balance; and 3) lack of employment stability. Organizations similarly ranked being able to keep pace with salary expectations and work/life balance among the top issues they face as employers.
- **Seeking business, leadership and management skills upgrades**, again both on the part of individual artists and cultural workers as well as organizations. The top-five rankings showed slight differences between artists and employers: employers placed more emphasis on marketing skills than workers, and workers/individuals ranked digital and technology literacy higher than employers. Both groups ranked creation, artistic and curatorial skills highly.
- **Finding greater success with face-to-face training** but is open to a wide variety of learning opportunities and modes. That being said, the top barrier to accessing training, according to workers, is the cost of programs and courses, followed by finding the time to pursue professional development.

Perhaps one of the most striking results in the report is that while some 69% of organizations surveyed reported that diversity and inclusion is one of their stated organizational values, just **one in three of those organizations (23% overall) has a clear, actionable plan to achieve explicit goals about diversity and inclusion**. The lag between awareness and practical action was echoed in regions across the province as a major challenge or stumbling block.

In each of the 10 roundtables, the discussions were facilitated around the lenses of a) individual workers and artists; b) workplaces and organizations and c) diversity, equity and inclusion. Discussions were broad-ranging within these subject areas but many common themes and needs emerged, for example:

- Day-to-day, year-to-year survival and sustainability was the major and most fundamental preoccupation for many artists and arts organizations;
- In some communities, the culture sector exists in the shadow of other larger sectors (technology, finance, healthcare, mining) which can make recruitment and retention especially challenging;
- Partnerships and networks were often well-developed *within* sub-sectors but there is a strong desire for greater links and connectivity *between* cultural hubs and regions around the province;
- Participants frequently voiced a widespread need for guidance on how to partner, engage and support Indigenous artists and culture workers as well as other equity-seeking groups.

The interconnected nature of the issues and challenges facing cultural sector organizations is striking and reinforces the potential for a cross-sectoral strategy for addressing common and critical issues.

Conclusions and Recommendations

MakingItWork's findings demonstrate the culture sector's vital need for relevant support programs and services and for labour market information specific to the culture sector. Individual artists and entrepreneurs as well as organizations of all sizes rely on external resources and guidance when it comes to navigating human resource issues - career development strategies and accessible, relevant and affordable skills and training programming.

The report covers many broad sector-wide issues and challenges, and it makes recommendations to address these challenges. The following recommendations are geared towards the core areas that the sector's stakeholders can realistically explore and tackle. Acting on these recommendations would involve collaboration between sector partners – expanding on connections that are already in place and, in other cases, forging new ones. An overall recommendation is for WorkInCulture to share the key findings of this report widely so that other stakeholders can leverage the data for their own needs and to continue to develop and provide relevant labour market information that can be useful to communities.

1. **Explore New HR Tools, Resources and Management Models Relevant to Ontario's Culture Sector**

    a. Adapt, fine-tune and expand skills development and training resources based on the priority needs summarized in this report e.g., business, leadership and management skills, marketing skills, governance and board management, digital technology training and diversity and inclusion training.

    b. Explore feasibility and/or interest in shared culture-sector HR and business administration services e.g., a People Library for sharing interns and other resources, shared digital and IT services (e.g., troubleshooting and other supports) and ongoing income data sharing.

2. **Expand Support for Diversity and Inclusion (DI) in the Culture Sector**
    a. Assess existing resources and capacity for developing more (and amplifying existing) DI hubs for resources, tools and training for Ontario's culture sector.
    b. Based on the assessment of needs and available resources, invest in the development of new programming and partnerships and an intensive outreach effort to address the diversity and inclusion challenges raised in this report (i.e., for organizations to move from awareness of issues, to action and implementation).
    c. Support efforts towards greater transparency in the culture sector. e.g., related to hiring practices, pay scales, board management and access to funders.
3. **Expand Support for Culture Sector Advocacy**
    a. Build WorkInCulture's capacity to further assert the value and contribution of the culture sector to a range of audiences and stakeholders from government and other funders, to the wider public, and further promote the work of communities already working in this arena.
    b. Establish new and strategic training opportunities and partnerships that respond to the desire for disruption articulated by the sector e.g., municipalities and regions, industry associations, culture sector leaders, and best practices from other sectors, jurisdictions etc.).
4. **Explore Capacity for Continuous Presence in Regional Culture Sectors**
    a. Explore the feasibility of building on MakingItWork research and census data to map and evaluate regional culture sector attributes (size, core issues, demographics, capacity, network access, strengths, language etc.). This data could be used to fine-tune WorkInCulture's existing and potentially new offerings to the regions as well as broaden the understanding of the distinctive cultural environments in each region.
    b. Develop online and digital tools to take advantage of resources and systems which can be used remotely and respond to the unique needs of regional communities (e.g., French language resources).

WorkInCulture's mission is to support the people who work in the cultural sector through life-long career development and entrepreneurial and business skills training. Some of the conclusions in this report extend beyond WorkInCulture's core mandate. That said, WorkInCulture is recognized as a hub for knowledge and capacity building in the culture sector in Ontario. Resource limitations mean WorkInCulture cannot address all the findings and challenges identified here. However, it has a vital role to play, alongside its partners, in many next steps supporting the sector's capacity and development.

1. Introduction

This section describes the background and context for the MakingItWork study, as well as the project mandate, objectives, approach and methodology.

1.1 Background Context

Work in the creative side of the culture sector has long been associated with the pursuit of passion rather than financial security. The rewards of working in the culture sector are often perceived to be in the joy of the work itself – creative, flexible and impactful. But of course, the culture sector is much more than that, just as arts institutions are much more than the creation of art itself. ***MakingItWork: Pathways Toward Sustainable Cultural Careers*** ("MakingItWork") looks at the whole gamut of roles and occupations across the full range of the cultural sector. It profiles the complex labour market that is generated by the cultural sector. It also examines the challenges the culture sector faces and recommends ways to address these challenges.

Contemporary society places many stresses on the cultural workforce; earning a living in the arts and creative industries has never been easy, but now seems especially demanding. From evolving and wide-ranging skills needs and growing expectations amid shrinking resources, to the precariousness of the gig economy structure, the economic pressures facing the culture sector are numerous. And yet, the sector has proven to be a vital component in post-industrial economies, fueling global innovation, entrepreneurship, job creation, resilience and collaboration. Culture and the arts are increasingly recognized as a vehicle for social cohesion. In this respect, it is vitally important to understand and track the demographic make-up of the sector in order to support and enable a diversity of artists and culture workers to thrive in the sector.

Ontario's economy benefits enormously from the nearly **275,000** employees and independent workers – full and part-time – across its cultural workforce. Many of the skills and abilities nurtured in the culture sector are in demand from other sectors, including technology. As a knowledge-based sector, culture work is recognized as being more resistant to automation and predicted to grow more rapidly than many other sectors. For these reasons, current and credible labour market information is urgently required for the sector. Ontario's leaders have begun to recognize and celebrate not only the culture sector's societal and artistic impact, but also its economic strength.

A complicating factor, however, is the challenge of defining and measuring the culture sector based on outdated employment classification models. Inconsistencies in this area have made it more difficult for the sector to understand itself, evaluate its own strengths, challenges and opportunities. Most importantly, it makes it difficult to demonstrate its many essential contributions to stakeholders, governments and funders.

> "More than ever, we need to create an informed labour market. Informed in the sense that education providers, workers, students, employers and policy makers know how skills are changing and are empowered to react to these changes, thereby countering skill mismatches."
>
> Jyldyz Djumalieva and Dr. Cath Sleeman, *The first publicly available data-driven skills taxonomy for the UK*, August 2018

To meet these methodological challenges, MakingItWork proposes a structure for measurement derived from the most recent Statistics Canada Census and industry classification approaches. MakingItWork profiles the sector along the lines of this new structure, and thus establishes a baseline of employment activity for future longitudinal analysis.

1.2 Mandate and Objectives

In undertaking this work, Nordicity was tasked to:

- Bring cultural definitions and measurement approaches together in a transparent way to further our understanding of the Ontario culture sector;
- Identify and assess the existing skills and training landscape, including workplace issues and barriers to successful professional development in the culture sector and recommend ways to address them;
- Identify emerging trends, needs, and gaps in the culture sector human resources landscape and in the process provide cultural stakeholders with a better understanding of the issues facing the cultural workforce;
- Provide the evidence base required to develop best practices, more effective support programs, and new opportunities and initiatives for the sector as a whole and WorkInCulture as an organization.

This report aims to identify the common and critical skills gaps and training needs across the culture sector and encourage directions for the design of, and investment in, future training initiatives, programming and partnerships on the part of WorkInCulture and the broader sector's stakeholders. By focusing on common and critical skills needs and embracing cross-sectoral training opportunities, there is a greater potential for increasing Ontario's globally competitive position through programming, initiatives and investments that benefit the sector as a whole.

The sector is complex and ever changing, and the composition of, and challenges facing, the cultural workforce require a more granular and sophisticated understanding of opportunities and barriers. This report will provide WorkInCulture and its stakeholders with a better understanding of what constitutes the cultural workforce with a view to improving the effectiveness of support programs and initiatives.

1.3 Approach and Methodology

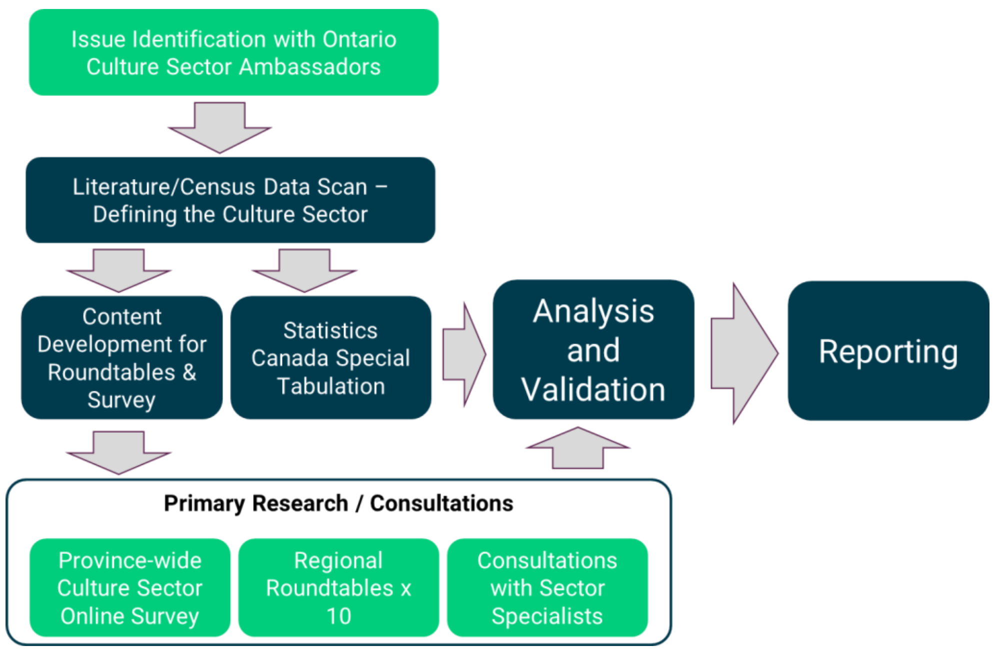
The approach for undertaking MakingItWork combined qualitative and quantitative data methods including an online survey, regional roundtables across the province and a custom data tabulation and analysis of Statistics Canada's Census of Population. Three main principles guided the approach and methodology for this study:

1. **Custom data analysis**: Historically, the culture sector has been challenging to measure, not only in Canada but worldwide. For MakingItWork, Nordicity has developed a custom approach for classifying and estimating the size of the culture sector in Ontario, built on best practices for defining and measuring the culture sector established by the Canadian Framework for Cultural Statistics (CFCS).
2. **Diverse and inclusive consultations:** The survey and regional roundtables were physically accessible and were promoted widely across social media and amongst WorkInCulture's project ambassadors. Accommodations were offered and provided as needed (e.g., translation and wayfinding signage). Diversity and inclusion were core discussion topics during every session.

3. **Common and critical needs:** As described above, WorkInCulture encouraged a focus on the "common and critical" issues that span the sector. Each discipline or sub-sector has its own attributes and unique challenges, but the goal of this report is to shed light on the characteristics, challenges and opportunities that are shared among and deemed urgent by the full sector. The recommendations have also been developed with an emphasis on cross-sectoral, cross-pollination strategies.

These principles were applied throughout the work program which is depicted in the visual below and described in greater detail in the following sub-sections.

Figure 1: MakingItWork – Approach and Methodology



Overview and Rationale

One of the most significant impediments to researching the culture sector is that traditional industrial classification systems do not readily capture the full contribution of creative and cultural workers to the wider economy. Since the 1980s, many countries, including Canada, have developed systems like the Canadian Framework for Culture Statistics (CFCS), which define the culture sector in the language of existing statistical classifications to support comparable research of the sector.

The most common application of frameworks for cultural statistics is the development of a Culture Satellite Account (CSA). CSAs make use of existing systems of national accounting – that is, broad-based data about the entire economy – to estimate the economic activity associated with the culture sector in terms of output, GDP and employment. In Canada, Statistics Canada publishes statistics about the culture sector at the national and provincial levels. The most up-to-date provincial level data is published annually in the Provincial and Territorial Culture Indicators (PTCI).

Although CSAs provide a reliable annual source of economic information about the culture sector, that methodology cannot provide specific information about the culture workforce that it quantifies. Approaches such as the one described in this section build upon the CFCS to develop a defensible and replicable approach to learn about demographic attributes of culture workers from other sources. Although any such synthesis of statistical data is invariably subject to limitations, this report employs a defensible approach to identifying and extracting information that cannot be produced by CSAs from a robust existing statistical source – namely, census data.

Although census data provides detailed demographic and financial information that would be very difficult to collect through primary research (e.g., it is difficult to collect detailed personal financial information in a voluntary online survey), it does not, on its own, meet all of the needs of this engagement. For that reason, Nordicity performed two additional lines of research to fill gaps in the census data and develop a nuanced understanding of the challenges facing organizations and workers in the culture sector. First, Nordicity administered a survey of workers and organizations (which focused on attributes that are unavailable in census data, such as employment benefits, job satisfaction, training needs and their future outlook). Second, Nordicity facilitated a series of roundtables in different communities across the province (to learn about regional differences and help develop a narrative reflecting issues faced by the culture sector.

1.3.1 Defining the Culture Sector

In this report, the Culture Sector includes four main subsectors: 1) Arts; 2) Cultural Industries; 3) Museums and Heritage and 4) Libraries. In turn, each subsector includes various specializations or disciplines, as shown in the following table:

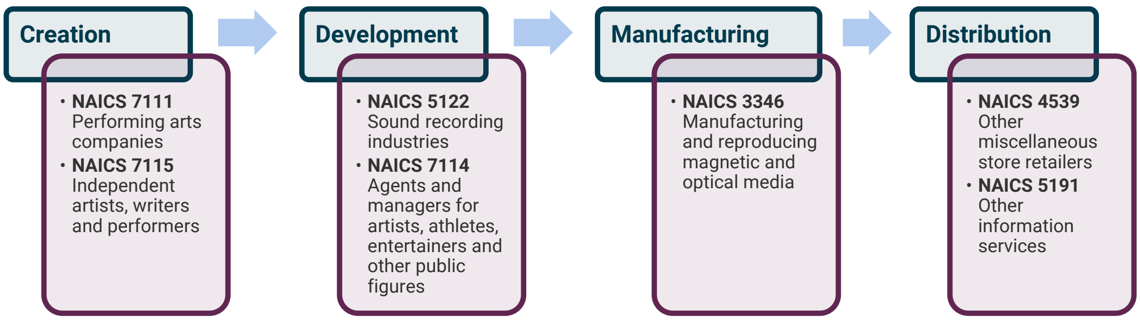
Culture Sector	Subsectors and Specializations			
Subsector	**Arts**	**The Cultural Industries**	**Libraries**	**Museums & Heritage**
Specializations	Visual Arts & Crafts Dance, Music, Theatre Literary Arts	Digital Media Design & Advertising Film & Television Book & Magazine Publishing Music Recording & Publishing	Libraries	Museums Archives

In this report, the culture "sector" is understood to be broader than a traditional "industry" (i.e., as having a discrete value chain producing a specific class of products). The culture "sector," as represented in this report is perhaps better understood using terminology from the CFCS (i.e., "domains"), which carries the implicit acknowledgement that cultural/creative workers are integral parts of the value chain in many/all industries.

The term "domain" invokes the more flexible contribution that cultural/creative outputs/products (intellectual property [IP] and derivative products, whether physical or licensed) make as intermediate inputs to the value chain in cultural and non-cultural industries. All this to say, the use of the terms "sector/subsector/specialization" in this report are perhaps more fluid than one would typically assume because the nature of cultural/creative outputs/products are not easy to reconcile with the traditional categorization of industries (i.e., North American Industry Classification System or NAICS).

To provide an example of a value chain that crosses traditional industries, consider the example of the **music recording and publishing subsector**. The CFCS defines a creative [value] chain as a "series of steps by which a culture good or service is created, developed, perhaps manufactured, and distributed or made available to end-users."[1] The following diagram provides a simplified summary of NAICS classifications that may be included (in whole or in part) in each step of this subsector's value chain.

Figure 2: Simplified summary of the music recording and publishing value chain to illustrate the contribution of multiple NAICS industry classifications to a single subsector



While the preceding diagram provides a clear illustration of a subsector ("domain") which crosses traditional industrial classifications, note that a subsector may also include secondary value chains which feed into intermediate steps of the main value chain. For example, in the music recording and publishing subsector (as depicted above), the manufacturing of sound recording equipment (which would supply the 'development' step of the value chain) or production of music notation and recording software (which would supply 'creation' and 'development' steps respectively) are both considered part of the subsector; as such, they have been included in the analysis to the extent that statistical classification systems permit.

Due to the limitations of statistical occupation and industry classification systems, the census data analysis also produced an extra segment of "workers employed across subsectors," which could not be associated with a particular subsector and/or specialization. Likewise, multi-disciplinary artists needed to select a primary field on the survey in order to be included.

1.3.2 Integrating Quantitative Data Sources

The quantitative results of this research are based on analysis of two data sources:

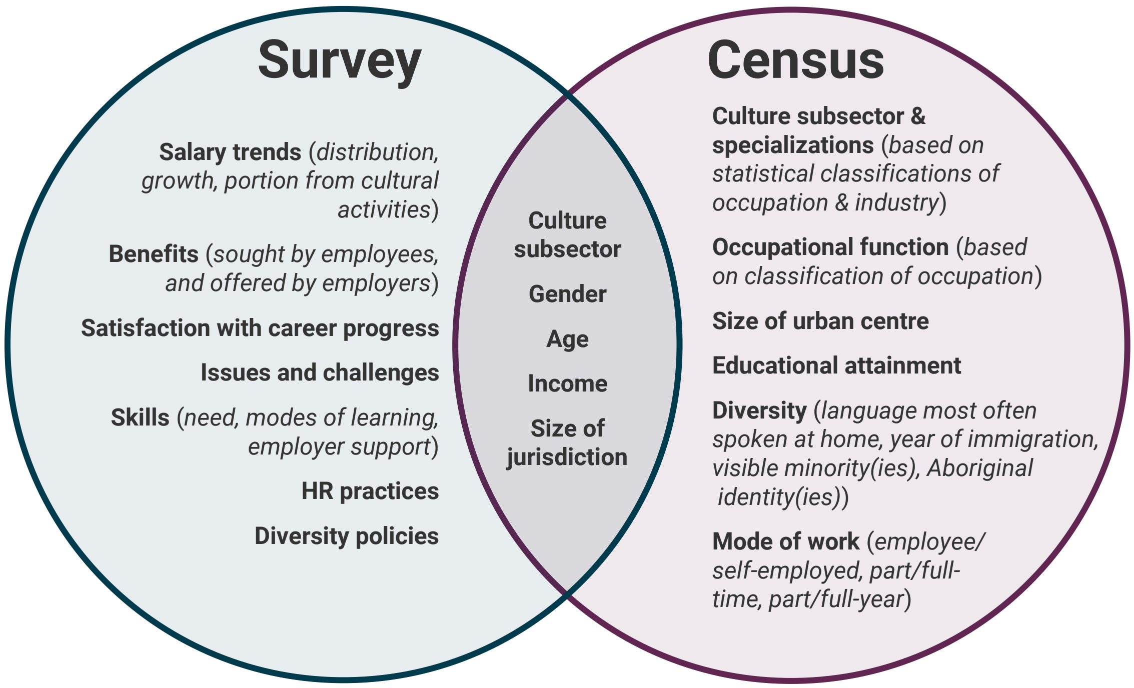
1. A **survey** of workers in the culture sector; and,
2. A **custom tabulation** of data extracted from Statistics Canada's 2016 Census of Population.

[1] Canadian Framework for Culture Statistics, https://www150.statcan.gc.ca/n1/pub/13-607-x/2016001/1247-eng.htm

Though each analysis relies on a separate and distinct methodology, each line of research contributes to a broader understanding of workers in the culture sector in Ontario. As an analogy, each data source is like a different window into the same room, each of which offers complementary perspectives on the same contents.

It was then necessary to confirm that the workforce visible by way of each data source did, in fact, represent the same population of workers. To that end, Nordicity relied on a comparison of salary data from each source. To extend the "two windows into a room" analogy, salary data was an unambiguous feature of the room that was visible from both windows. The following Venn diagram illustrates the data points that were collected through each data source.

Figure 3: Venn diagram illustrating data coverage of quantitative data sources*



*Throughout this report, when drawing on Census data, we use the term "Aboriginal" or "Aboriginal Identity(ies)" – as in the visual above – to be consistent with the 2016 Census of Population terminology.

In order to test if these two data sources could be viewed together, Nordicity performed an analysis of a **common reference population** by adjusting for known differences between the two data sources and comparing the variables that were included in both data sets (i.e., the variables listed in the overlapping portion of the Venn diagram above). Due to specific analytical limitations of each data set, adjustments were performed on each data source to develop a set of statistics that represented a reference population that was possible to identify and isolate in both sources for each of the comparative statistics. The following table summarizes the results of this analysis.

Table 2: Comparison of common reference population from survey data and census data

<table>
<tr><th colspan="2">Variable</th><th>Survey data</th><th>Census data</th></tr>
<tr><td colspan="2">Culture subsector breakdown</td><td>Entire survey sample:
Response rates are described in detail in the following subsection.</td><td>Adjusted to match survey sample:
This data includes Arts, Libraries, and Museums and Heritage in full, and Cultural Industries were weighted in proportion to survey response rates (such that it represents 10.7% of the reference population).</td></tr>
<tr><td colspan="2">Gender (% female)</td><td>74%</td><td>61%</td></tr>
<tr><td colspan="2">Average age</td><td>41 years old</td><td>42 years old</td></tr>
<tr><td colspan="2">Average income</td><td>$45,000</td><td>$42,500</td></tr>
<tr><td rowspan="3">Size of jurisdiction</td><td>>500k</td><td>62% of sample</td><td>72% of reference population</td></tr>
<tr><td>100k-500k</td><td>24% of sample</td><td>16% of reference population</td></tr>
<tr><td><100k</td><td>14% of sample</td><td>12% of reference population</td></tr>
</table>

As the above table illustrates, the survey and census data accord very well in terms of both average age and income. On the other hand, the survey data *over-represents* women and people working outside of major urban centres (e.g., the Greater Toronto Area, Ottawa, etc.). Research suggests that those two population groups (e.g., rural residents and women) would be most interested in, and likely to fill out a survey about human resource issues and the labour market because they are among those that face the greatest HR-related challenges (e.g., slower pace of career advancement/promotion, lack of access to training and recruitment opportunities, lower incomes/rates of pay). As a result, this bias is not wholly unexpected and the survey response sample, while not perfect, is perceived to be valid.

1.3.3 Methodological Limitations

Readers should bear in mind two important limitations in the classification of occupations and industries which constrain the ability to definitively associate certain workers with a particular cultural subsector. The following points address the two most significant high-level challenges encountered in this analysis.

- **The information drawn from census data relies on workers' primary occupation and industry as reported in the census.** As such, the results of census data analysis may underrepresent workers in portions of the industry where casual employment is most prevalent and/or where culture work is a secondary source of income or employment. That said, this limitation may represent a strength to the extent that the analysis focuses on workers whose main productive contribution to the economy is related to (and primary source of income is derived from) their work in the culture sector – that is to say, career culture workers. We may learn more about those casual or secondary employment culture workers (and likely also fans and audiences for arts and culture) on another occasion with a different approach.
- **Industrial classifications in census data are only available at the four-digit level of NAICS codes** (out of six total digits in the taxonomy). As such, it was not possible to achieve the

full level of granularity set out in CFCS – inclusions of occupational and industrial codes at the margin of the culture sector relied on Nordicity's professional judgement to establish consistent thresholds. This limitation occurs at two levels of the analysis:

- **Identifying the overall culture sector:** One of the most significant examples of this limitation is that NAICS classifications at the four-digit level provide information about NAICS 5112 "Software publishers," but do not distinguish video game publishers until the six-digit level of the hierarchy (NAICS 511212 "Video game publishers"). Because the occupational roles of game and other software publishers are quite similar, this methodology necessarily includes the broader software publishing industry as part of the Digital Media specialization.
- **Classifying workers *within* the culture sector:** In some cases, it was possible to establish that workers in a certain occupation and industry are part of the overall culture sector, but not to assign those workers to a particular subsector. As a result, such workers were collected into an "Employed across subsectors" classification and excluded from subsector-level analysis.
  - To cite a specific example, there are 590 workers in the NOC occupation "*1123 – Professional occupations in advertising, marketing and public relations"* and the NAICS industry "*7114 – Agents and managers for artists, athletes, entertainers and other public figures"*.
  - For the purposes of this research, these workers are considered culture sector workers for two reasons – first, as an advertising-related job, the professional occupations in NOC 1123 perform a managerial function consistent with the *Design and Advertising* specialization of the cultural subsector *Cultural Industries*; second, the scope of the industry classification indicates that at least a portion of these workers are part of the value chain contributing to the output of the *Arts* and *Cultural Industries* subsectors (in addition to several non-cultural industries).
  - In these circumstances, it would be preferable to identify the portion of these advertising professionals who are part of the value chain in the culture subsectors *Arts* or *Cultural Industries* (i.e., those who represent artists, dancers, musicians, stage actors, screen actors, newscasters, etc. who are included in specific cultural subsectors), and then classify any remaining workers (i.e., those who represent athletes and other public figures) into the *Design and Advertising* subsector.
- In this case (and many other similar situations that arose during this analysis), the occupational and industrial classifications did not provide sufficiently granular information to make this judgement, and as a result, all 590 of these workers were simply included in the Employed across subsectors classification.

1.3.4 Census Data Profile

This section describes the analytical techniques used to identify, isolate and classify workers in the culture sector based on a custom tabulation of data from **Statistics Canada's *2016 Census of Population***. This section performs a parallel function to the following section (the survey response profile) by describing the types of workers that are represented in findings drawn from census data.

Summary of Census Analysis Methodology

In order to extract information about workers in the culture sector, this analysis relies on statistical classifications of **occupations (National Occupational Classifications, or NOCs)** and **industries (NAICS)**. Moreover, this work focuses on the set of occupations and industries that are identified as being part of the culture sector in the **CFCS**. This approach differs from Statistics Canada's Culture Satellite Account (CSA), which primarily relies on product and industry classifications. **As such, it is important to note that although both approaches are based on the same conceptual framework, the criteria used to isolate employment in the culture sector are fundamentally different.**

The CFCS uses a taxonomy of 'domains' and 'subdomains' to break the culture sector down by the nature of cultural activity. While NAICS industrial classifications are intended to perform that purpose for most of the economy, it has been observed that cultural value chains do not always fit neatly into the industrial definitions set out in NAICS. A good example illustrating this issue is the case of craft practitioners – craft workers produce artisanal products (baskets, textiles, furniture, etc.), which may be classified within a variety of industries based on the definitions set out in NAICS. As a result, there is no simple way to distinguish the production of an artisanal wicker lawn chair from a similar item mass produced in a factory solely based on a NAICS classification. To address this issue, the CFCS employed new terminology (i.e., domains and subdomains) to mark a break from established industrial classifications, acknowledging that the culture sector's value chain transcends the categories used in existing classifications and, importantly, represents a departure from established notions of where (and how) the lines have traditionally been drawn to distinguish industries.

For the practical purposes of this report (i.e., learning about Ontario's culture sector workforce), this analysis parallels techniques that would be familiar to readers who have previously read **Nesta's *A Dynamic Mapping of the UK's Creative Industries***. In that work, researchers identified creative professions and applied an 'intensity model' to analyze the degree to which creative workers participate in major industries across the economy according to census data. In so doing, Nesta's analysis confirmed their hypothesis that cultural industries tended to have a high creative intensity (i.e., a high concentration of creative job functions in comparison to other industries). Similarly, Nordicity used CFCS' definitions of occupations and industries to identify the culture sector in custom tabulations of census data specially ordered through Statistics Canada.

Although, like Nesta, Nordicity uses CFCS definitions to report on the creative intensity within culture subsectors, the main reason for undertaking this approach (of filtering census data by occupations and industries) was to perform the additional step of extracting demographic and income information about culture sector workers.

- Returning to the example of craft practitioners, the approach used in this study (i.e., applying culture sector definitions from CFCS to census data broken down by occupation and industry) allowed Nordicity to infer that workers classified as NOC 5244, "Artisans and craftspersons" working in industries such as NAICS 316 "Leather and allied product manufacturing" or NAICS 337 "Furniture and related product manufacturing" are more likely to be skilled artisanal craftspeople – and moreover, employed in a creative capacity – than they are to be factory workers assembling mass-produced leather or furniture products. As such, these workers are included in the visual arts subsector, as defined in this report.

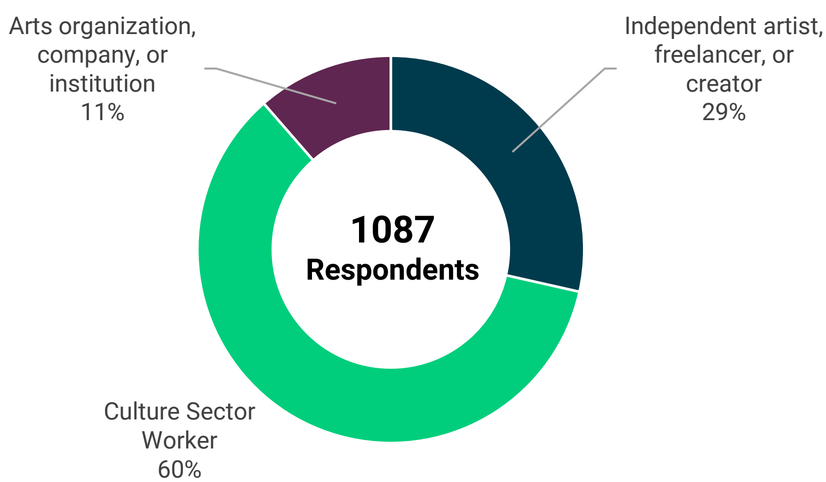
Though CFCS was used as a key source of information to inform this methodology, Nordicity's subsectors and specializations do not correspond exactly to domains and subdomains in CFCS. For a detailed description of precisely how Nordicity mapped NAICS and NOCs codes for each culture subsector and extracted the census data presented in this report, please see:

- **Appendix D** for more details on the analytical approach; and
- **Appendices E and F** for the full lists of the NAICS and NOCs codes which are associated with each subsector and specialization, as presented in this report.

1.3.5 Survey Response Profile

As explained above, a portion of the data represented in this report was gathered through an online survey. The survey collected data from individual artists, arts/heritage companies and organizations, libraries, archives, and people working at these institutions, and was open from August through October of 2018. The questionnaire was made open to all potential respondents and was distributed via a variety of means including partner organizations' mailing lists, social media, and personal invitations. In the end, the survey collected completed questionnaires from a total of 1087 respondents. The following chart illustrates the breakdown of those respondents by type.

Figure 4: Survey Response by type of respondent



Source: MakingItWork Survey 2018

While the survey captured them in different categories, the independent artists and culture sector workers are analyzed together in this report as "culture sector workers."

Across all three types of respondent, the largest share came from the Arts sub-sector, as illustrated below:

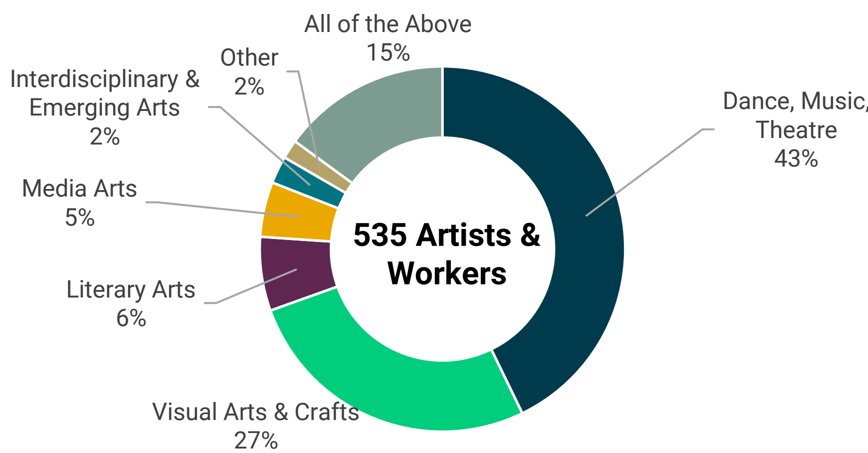
Figure 5: Survey response distribution by respondent type and sub-sector

Source: MakingItWork Survey 2018

While the responses from the Arts, Heritage and Museums, and Libraries sub-sector were roughly proportional to the overall industry, representation from the Cultural Industries was significantly *less* than proportional. As such, readers should keep that limitation in mind when interpreting the survey results. Also, **where survey data is directly compared to Census data, the analysis *excludes* the creative industries, making for more reliable analysis.**

Given that the survey collected data from over 500 individual respondents in the Arts sub-sector, it is possible to break down the respondents by artistic discipline.

Figure 6: Individual arts respondents by artistic discipline

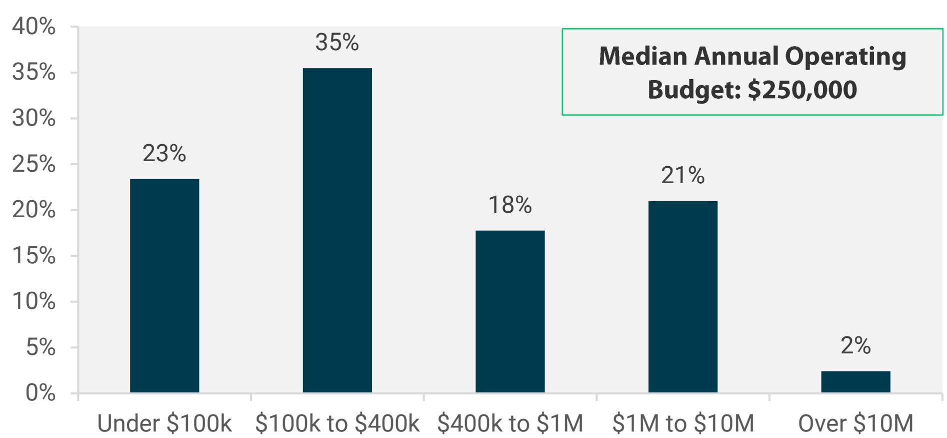


Source: MakingItWork Survey 2018

As illustrated above, the plurality of arts respondents came from the performing arts (i.e., dance, music, and/or theatre). At the same time, 15% of respondents were active in all the listed artistic disciplines.

The 124 responding arts organizations, companies, and institutions (henceforth referred to as "organizations") ranged from the very small (with annual operating budgets of less than $100,000) to organizations with annual operating budgets between $30 million and $40 million. The following chart illustrates the distribution of these responses:

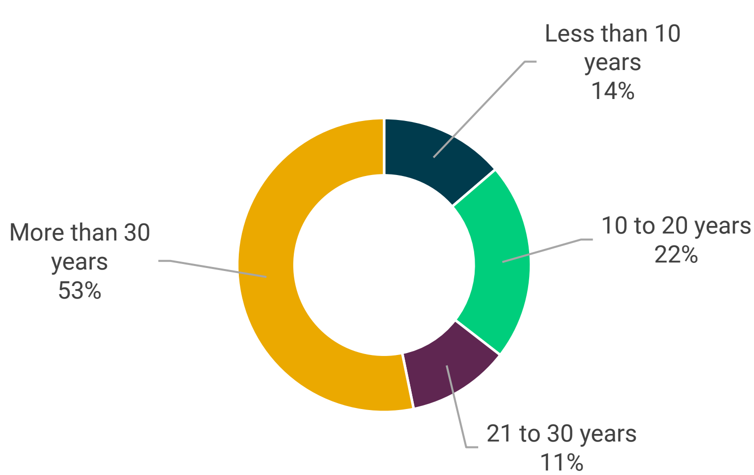
Figure 7: Organization respondents by annual budget



Source: MakingItWork Survey 2018

At the same time, the responding organizations were, on average, established organizations, having operated on average for 39 years. As well, most (53%) of the responding organizations were established more than 30 years ago, as depicted below:

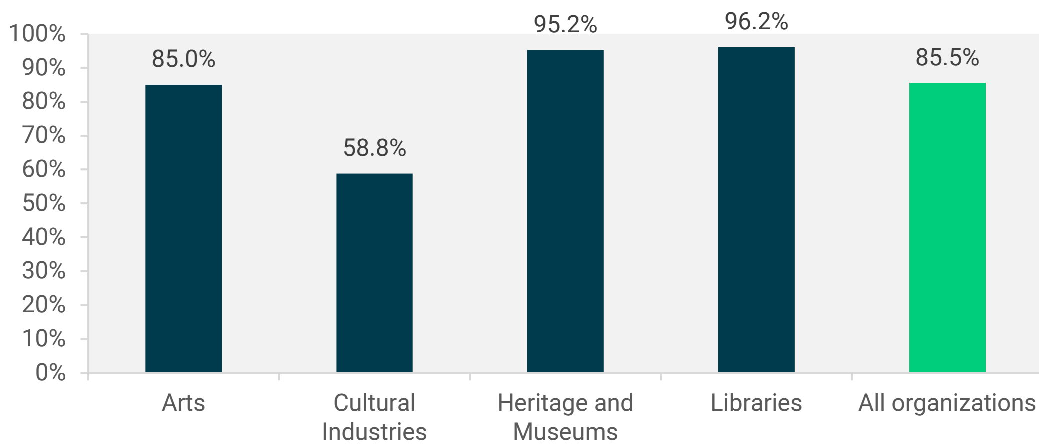
Figure 8: Organizations by years in operation (by group)



Source: MakingItWork Survey 2018

Finally, across all sub-sectors the majority (86%) of organizations responding to the survey identified themselves as being not-for-profit entities, as illustrated in the following figure.

Figure 9: % of responding organizations as not-for-profit entities



Source: MakingItWork Survey 2018

At 58.8%, this proportion of not-for-profits is likely high for the cultural industries. Readers are reminded that the cultural industries as a whole are under-represented in the survey data.

1.3.6 Roundtable Consultations

The qualitative results of this research are based primarily on the discussion content from 10 roundtables which were facilitated across Ontario. Regional project ambassadors were identified by WorkInCulture in the first phase of the project. These ambassadors comprised leaders from relevant industry associations and arts councils across the province. Ambassadors were relied on to provide support with hosting roundtables and promoting the online survey. Ambassadors attended a kick-off session in the first month of the project in order to learn about its goals and planned activities and support a preliminary identification of the key issues facing the culture sector.

The cross-sectoral roundtables were held in nine regions across Ontario, with two taking place in Toronto. Total roundtable participation reached 127 people across the province. Both Nordicity and WorkInCulture acknowledge that greater diversity in consultations is an ongoing goal.

Table 3 MakingItWork Roundtable Communities

Culture Sector Roundtables			
Population	**<100,000**	**100,000 - 500,000**	**>500,000**
Communities	Owen Sound	London Sudbury Thunder Bay Kingston	Toronto (x 2) Ottawa Hamilton Kitchener-Waterloo

In each facilitated roundtable, the discussion was equally weighted towards a) individual workers and artists; b) workplaces and organizations and c) diversity, equity and inclusion.[2] Discussions were broad-ranging within these subject areas but many common themes and needs emerged, for example:

- Day-to-day, year-to-year survival and sustainability was the main preoccupation for many artists and arts organizations;
- Partnerships and networks were often well-developed *within* sub-sectors, but participants expressed the desire for greater links and connectivity between cultural hubs around the province;
- In some communities, the culture sector exists in the shadow of other larger sectors (technology, finance, healthcare, mining) which can make recruitment and retention challenging;
- Participants expressed a widespread need for guidance on how to partner, engage and support Indigenous artists and culture workers as well as other equity-seeking groups.

When it came to solutions, participants were encouraged to focus on issues that they as stakeholders, as well as WorkInCulture, could address, e.g., through developing new programs and partnerships and/or accessing existing programs.

A note to readers regarding the terminology used in this report

Throughout this report, when drawing on data from Statistics Canada's 2016 Census of Population, we use the terminology and labels that are consistent with its nomenclature. In some cases, however, this terminology feels outdated. For example, when we draw on census data, we describe "members of visible minorities" instead of "persons of colour" and "Aboriginal Identity(ies)" instead of "Indigenous People." For clarity, we believe it is important to be consistent with the language used by Statistics Canada in its surveys and reporting. Throughout the report we have referred to relevant data sources for definitions and descriptions of how Statistics Canada segments the population.

[2] In the context of *MakingItWork,* the following definitions were presented based on guidance from DI experts: 1) **Diversity** is the presence of different peoples within a group or society e.g., people of different races, ethnicities, genders or gender expressions, sexual orientations, physical or psychosocial abilities, religions; 2) **Inclusion** is when diverse members of a society are fully-represented, engaged and empowered and varying perspectives, cultures, life experiences and views are respected, valued and embraced and 3) **Equity** is a principle and process that promotes equality of opportunity and fair conditions for all persons to fully participate in society.

2. Ontario's Culture Sector's Workers and Artists

This section describes who is working in Ontario's culture sector in terms of their subsector or their specialization, the size of the community in terms of population and demographics such as age, language, educational attainment and visible minority status. This section goes on to outline the ways in which the people in the culture sector in Ontario are working, whether full-time or part-time, with what salary level and benefits, as well as issues and challenges encountered along the way.

Skills and training needs, while touched upon in this section, are further discussed in Section 4. The results presented here were drawn mainly from the Statistics Canada 2016 Census of Population as well as the 2018 MakingItWork survey data analysis and roundtables.

2.1 Subsectors, Specializations and Occupational Functions

Based on an analysis of a custom data tabulation from Statistics Canada's 2016 Census, Nordicity estimates that there are **274,220** individual workers employed in Ontario's Culture Sector.

For the purposes of this report, employment is exclusively measured using headcounts. This approach differs from the use of *full-time equivalents* to measure employment in Statistics Canada's Provincial and Territorial Culture Indicators (PTCI), as well as much of Nordicity's published industry and economic research. The following breakout box provides a discussion to highlight the differences between headcounts and full-time equivalents.

Measuring Employment: Headcount vs. Full-time Equivalents (FTEs)

When interpreting employment statistics, it is important to distinguish between the two common approaches to measuring workforces. The most intuitive method (headcount) is to simply count the number of individual workers. Labour economists, on the other hand, typically take a more abstract approach, preferring units that express the quantity of labour applied to produce goods and services (full-time equivalents). Each of these approaches is described in more detail below.

Headcount is the simplest measure of employment and offers an intuitive metric for many types of analyses. For example, individual attributes of the workforce, such as sociocultural diversity, education, financial wellbeing, job satisfaction, and mode of employment are best expressed using a measurement approach that counts each worker as an individual person. Moreover, unlike FTEs, data focusing on individual workers is more easily linked to other demographic data such as household-level statistics.

Full-time equivalents (FTEs), on the other hand, are a standard economic unit typically used to measure labour inputs. Specifically, an FTE is one person-year of productive labour, which provides a common unit to quantify and directly compare workers that may have a variety of modes of employment (e.g., full-time, part-time, temporary, etc.). For example, one FTE could represent: one full-time, full year worker; two part-time workers working an average of 2.5 full days per week for the full year; or three interns working full-time for 4 months.

FTEs are calculated by dividing total labour income (i.e., companies and organizations' total expenditures on payroll and benefits) by the annual average earnings per FTE in the relevant industry. In order to incorporate varied modes of employment into a single annual average earnings per FTE calculation, the annual earnings of each mode of employment are weighted into the average in proportion to the average weekly hours worked over a full year.

The following table presents top-line worker headcounts broken out by subsector (i.e., Arts, Cultural Industries, Libraries, and Museums and Heritage), and the specializations (i.e., the artistic disciplines, industries, and/or types of institutions) within those subsectors.

Table 4: Worker headcount by subsector and specialization

Subsectors and specializations	Worker headcount
Arts	**55,435**
Visual Arts & Crafts	21,765
Dance, Music, Theatre	25,770
Literary Arts	7,900
The Cultural Industries	**191,795**
Digital Media	66,805
Design	64,455
Film & Television	38,320
Book and Magazine Publishing	19,335
Music Recording and Publishing	2,880
Libraries	**14,575**
Museums and Heritage	**3,490**
Museums	2,375
Archives	1,115
Employed across subsectors	**8,925**
Total	**274,220**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

As described in Section 1.3.4, occupational and industrial classifications are the basis used to define the subsectors and specializations outlined above. In a nutshell, each culture-related occupation and industry combination observed in the census data was mapped to a specialization with the best fit. Some of these classifications are quite simple – for example, all workers classified as NOC 5133 “Musicians and singers” and NOC 5134 “Dancers” in the culture sector are included in the Dance, Music, Theatre specialization. To cite a more nuanced example, workers classified as NOC 5131 “Producers, directors, choreographers and related occupations” may also be classified in Dance, Music, Theatre, or a number of other specializations (including Digital Media, Music Recording and Publishing, or Film & Television) depending on the industry in which these workers are employed.

For more detailed information about what was included in each subsector and specialization, see:

- **Appendix B** to review all census data broken out at the specialization level (i.e., the unshaded rows in Table 2), including workers employed across subsectors.
- **Appendix D** for a full description of the analytical approach; and,
- **Appendices E and F** for full lists of the NAICS and NOCs codes which were associated with each subsector and specialization.

Also note that section 1.3.3 provides some specific examples relating to limitations of this methodology.

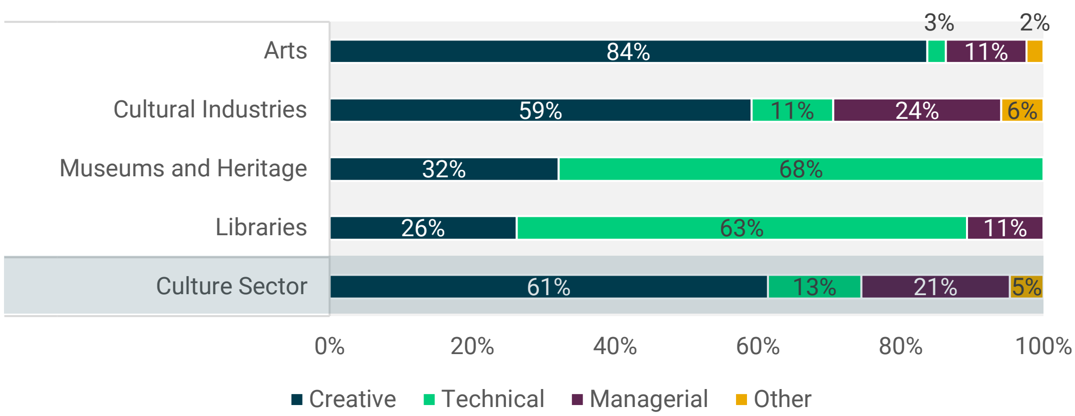
The balance of this report focuses on the subsectors (depicted in shaded rows above), *excluding* the 8,925 workers employed across subsectors[3].

Each of the subsectors outlined in the table above comprises a functionally diverse workforce – from the technical workers involved in television broadcasting (e.g., camera operators and audio technicians) to the creative (e.g., curatorial) staff at a museum, there are a wide range of occupational functions employed in the culture sector. The following chart illustrates the distribution of creative, technical, managerial, and other (which includes educational, governance and manufacturing support roles) functions within each subsector. At a glance, the distribution of occupational functions is consistent with the types of production in which each subsector engages.

Note regarding "overall averages" for the culture sector as presented in this report

For the most part, the results in this report present findings for each sub-sector as well as an overall culture sector average. Of course, the subsectors which employ the largest portion of the workforce contribute more strongly to this overall average. In this case, the largest subsector is the cultural industries which **represents 70% of the overall culture sector workforce. Therefore, the cultural industries exert a correspondingly large influence on the overall averages presented in this report** e.g., income, geography/location etc. and so in some cases the overall average is not necessarily a good proxy for the arts sub-sector average.

Figure 10: Culture sector workers, distribution of headcount by occupational function and subsector



Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

[3] Due to limitations of statistical occupation and industry classification systems, "workers employed across subsectors" could not be associated with a particular subsector and/or specialization. An example of these workers is described in a breakout box in section 1.3.4.

The arts subsector employs the largest share (84%) of creative workers of any subsector. Creative workers in the arts are largely comprised of practitioners such as visual artists (e.g., painters, photographers, illustrators, sculptors, etc.), authors, and performers, that is to say, people personally involved in the development and production of creative products and services. The arts exhibit a modest need for technical support, particularly in the performing arts, however, these occupations do not contribute significantly to the overall workforce in the arts. Managerial roles are most prominent in promoters of performing arts events, managers of performing arts companies, and managers of exhibiting organizations in the visual arts.

Differences in the composition of occupational functions within the cultural industries and the arts largely reflect features of each subsector's dominant modes of production and distribution. Whereas the arts tend to exhibit a labour-intensive use of creative workers to produce and disseminate products and services, the cultural industries typically produce and distribute scalable analogues to these products and services. For example: recorded/broadcast media replaces performances; mass-production and publishing (e.g., of books, music, etc.) overshadows hand-made and individual distribution; and artisanal creation (e.g., painting, sculpture, craft, fashion, etc.) gives way to the large-scale planning role played by designers and architects. As such, the cultural industries rely more heavily on technology and tend to employ more supporting roles (technical and manufacturing workers) than the arts. Similarly, because such organizations tend to encompass a more complex value chain requiring taller organizational structures, managers tend to make up a larger share of the overall workforce.[4]

There is little difference between the composition of museums and heritage and libraries in terms of occupational function as shown in Figure 10. Overall, each of these subsectors draws a quarter to a third (26 to 32%) of its workforce from creative workers (largely librarians and archivists), and the balance of the workforce provides technical support to these creative workers. Note that the statistical occupational and industrial classification systems used to perform this analysis do not provide enough granularity to identify managerial roles employed in the libraries and museums and heritage subsectors.

2.2 Demographics

The information presented in the previous subsection provides insight into the nature of work in each subsector; this subsection focuses on demographic characteristics of the workers themselves.

[4] The generalizations presented here are intended to provide a framework to better understand the differences observed across subsectors. As with any generalization, it should be noted that there are likely many exceptions. For example, organizations and individual artists in the visual and performing arts can, in a sense, scale by means other than technology. Specifically, artists of renown can sell their work for significantly higher prices than the average artist, and acclaimed performers and performing arts organizations can reach audiences at a scale rivaling organizations in the creative industries. In a sense, this conceptual model simply recognizes that the cultural industries are characterized by distinct modes of production and distribution that are organized to systematically and efficiently commercialize scalable products derived from intellectual property, whereas the arts tend to trade in products that connect with buyers and/or audiences at smaller scale – local, up-close, in-person, and/or hands-on.

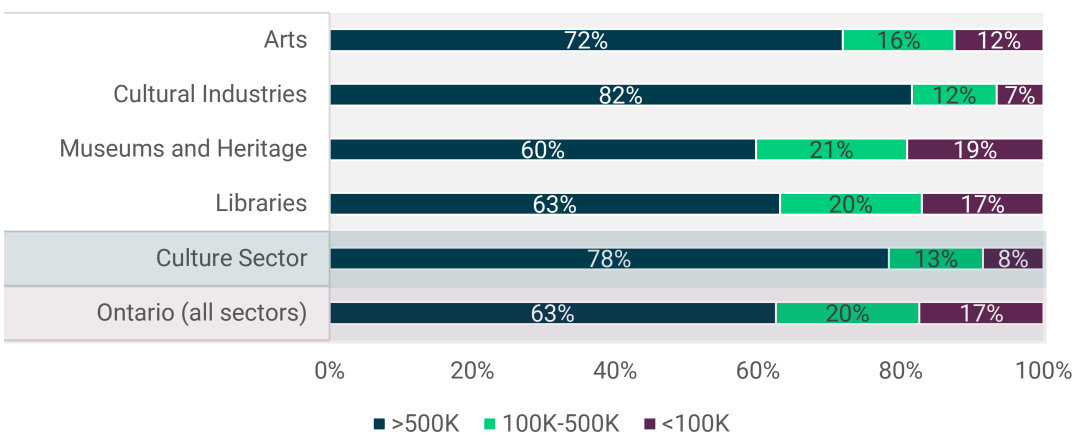
In order to learn about the geography of the culture sector, Nordicity developed classifications for the size of the Census Metropolitan Areas (CMAs) or Census Agglomerations (CAs) in which respondents reside. CMAs and CAs were broken out into those with a population:

- **Greater than 500,000**, which includes Toronto, Ottawa, Hamilton, and Kitchener-Cambridge-Waterloo;
- **Between 100,000 and 500,000**, which corresponds to metropolitan centres such as Belleville, Peterborough and Thunder Bay at the low end, to St. Catherines-Niagara and London on the upper end; and,
- **Fewer than 100,000**, which includes Chatham-Kent, Sarnia and Sault Ste. Marie at the upper bound, extending down to rural areas.

In taking this approach to geography, this analysis focuses on the industry make-up of like-sized communities, rather than specific locations in Ontario. This approach has the benefit of breaking down the entire provincial population into three simple and relatable categories. Moreover, each category of "size of urban centre" addressed in the analysis is supported by a large sample in the census, which sidesteps the sampling limitations that might otherwise occur in an analysis of the most sparsely populated regions/municipalities in Ontario. Although this approach allows for a concise high-level description of the geography of culture sector workers in Ontario, this classification does not necessarily capture the unique regional differences that may exist within each geographical category or region.

The following chart illustrates the distribution of cultural workers by the size of urban centre in which they reside.

Figure 11: Culture sector workers, distribution of headcount by size of urban centre and subsector

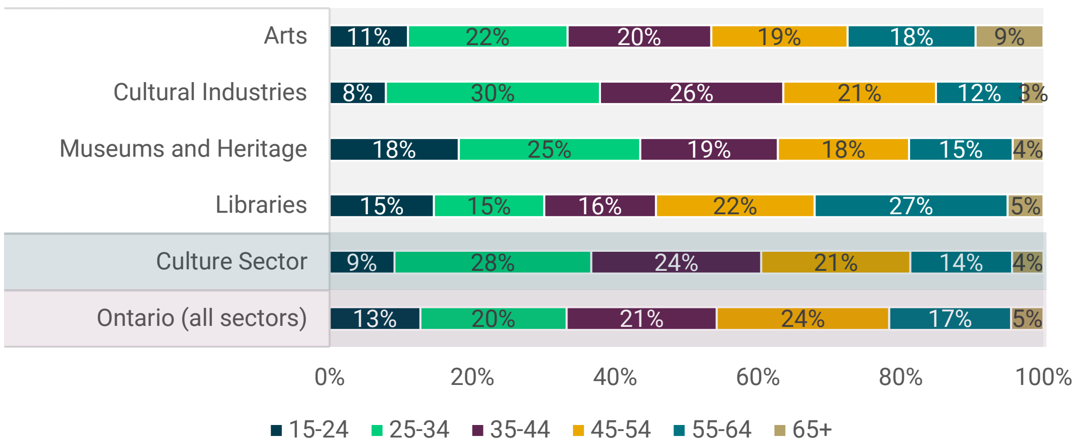


Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Overall, the culture sector is much more concentrated in large urban centres than the overall workforce in Ontario. Specifically, 78% of the culture sector is employed in urban centres with over 500,000 residents, in contrast to only 63% of the workforce in Ontario overall. Note, however, that culture workers are not uniformly clustered in urban centres in each subsector. Workers in museums and heritage, and libraries are largely consistent with the provincial average. On the other hand, workers in the cultural industries are the most concentrated in large urban centres, with over four in five workers residing in centres with a population over 500,000.

The following chart illustrates the distribution of workers by age within each subsector.

Figure 12: Culture sector workers, distribution of headcount by age and subsector



Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Overall, the workforce in the culture sector appears to attract high levels of participation from the 25-34 (green) and 35-44 (purple) age groups. All other age groups are underrepresented relative to the overall age distribution of the Ontario workforce. In particular, high levels of participation in the 25-34 (green) and 35-44 (purple) age groups are most prominent in the cultural industries, followed by the arts. In contrast to other subsectors, libraries have a notably higher participation among workers in the 55-64 age group (light blue), which appears to offset notably low levels of participation in the 25-34 and 35-44 groups. Museums and heritage are notable for having high rates of participation in the 15-34-year-old age groups (blue and green), which makes them slightly younger than the arts and cultural industries.

In order to provide another perspective on the data presented above, the following chart illustrates the estimated average age in each subsector.[5] As a whole, the culture sector is slightly younger than the overall workforce in Ontario. Although this representation of age is a comparatively blunt tool, this approach does provide some useful perspective to the narrative presented above.

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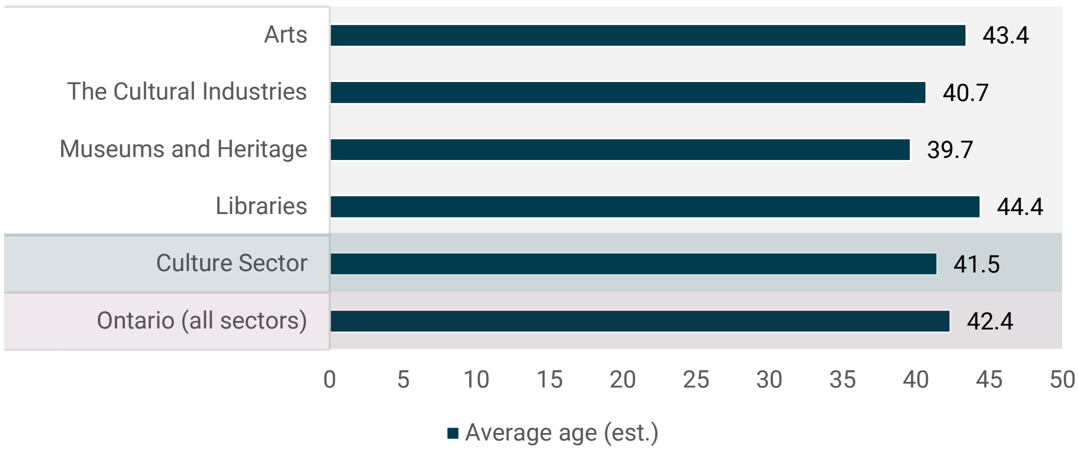
[5] Average ages in each subsector were calculated by taking an average of the middle age in each age bracket and weighting that value by the number of workers represented in each age group. As such, the exact value may not be perfectly accurate, but this approach provides a single indicator that can be simply and meaningfully compared across subsectors.

Figure 13: Culture sector workers, estimated average age by subsector



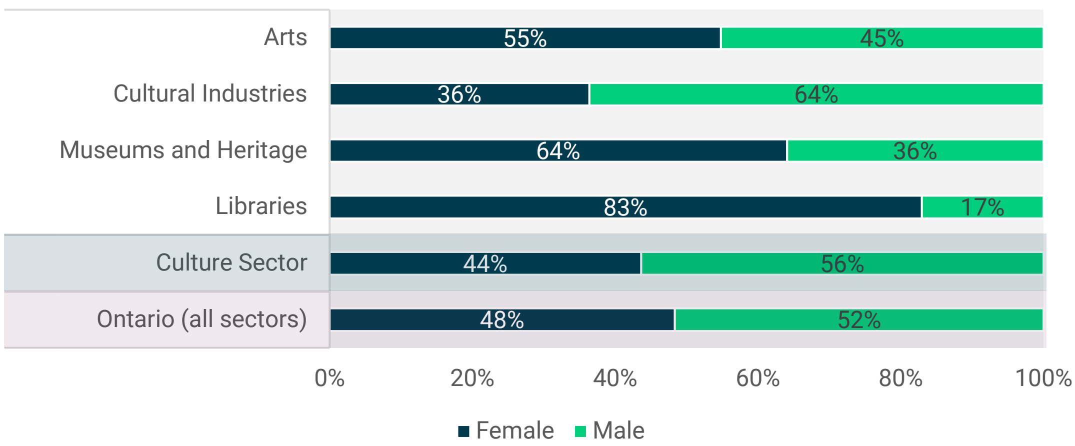
Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

The arts, though notable for its high levels of youth participation, also includes a large share of workers in the oldest two age brackets. As this chart shows, the arts are second only to libraries in terms of average age, but the distribution of workers in this subsector is clustered at the extremes of the age range. In contrast, the culture sector yields a lower average age, but most of the workforce is clustered around the average value. Museums and heritage yield the lowest average age, which is consistent with having the highest participation from young workers, and the comparatively high participation among 45 to 64-year-olds in libraries contributes to it having the highest overall average age of all the culture subsectors.

The following chart breaks out the sex of workers in each subsector.[6]

[6] According to Statistics Canada, "For the 2016 Census of Population, transgender, transsexual and intersex Canadians were asked to indicate the sex (male or female) with which they most associated themselves. Respondents who could not select one category… had the option of leaving the question blank and indicating in the Comments section, the reason(s) for which they had chosen to leave this question unanswered." In this context, respondents may have answered based on gender rather than birth or biological sex. In any case, we are limited to reporting as a binary - 2016 Census of Population: Age and sex release https://www12.statcan.gc.ca/census-recensement/2016/ref/98-501/98-501-x2016002-eng.cfm

Figure 14: Culture sector workers, distribution of headcount by sex and subsector

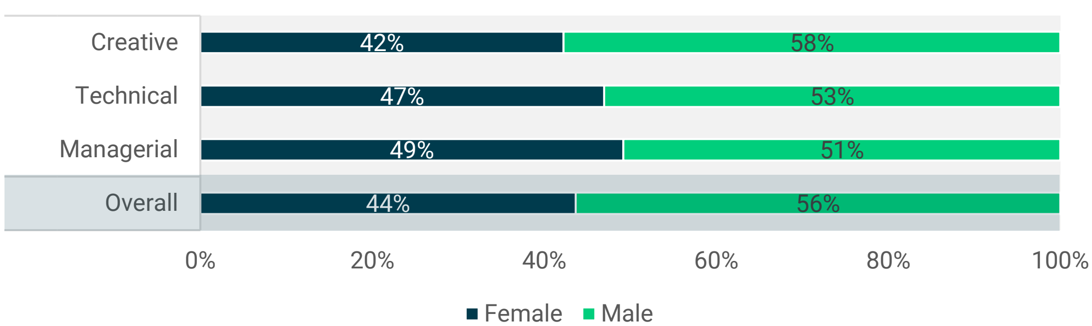


Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Overall, women are slightly less prevalent in the culture sector workforce (44%) than in Ontario's workforce overall (48%). While every subsector *except cultural industries* employs an above-average share of women, the sheer size of the workforce in the cultural industries contributes an outsized effect on the overall average for the culture sector. The workforce for libraries comprises 84% women.

The following chart provides an illustration of how sex is distributed in the culture sector by occupational function.

Figure 15: Culture sector workers, distribution of headcount by sex and occupational function

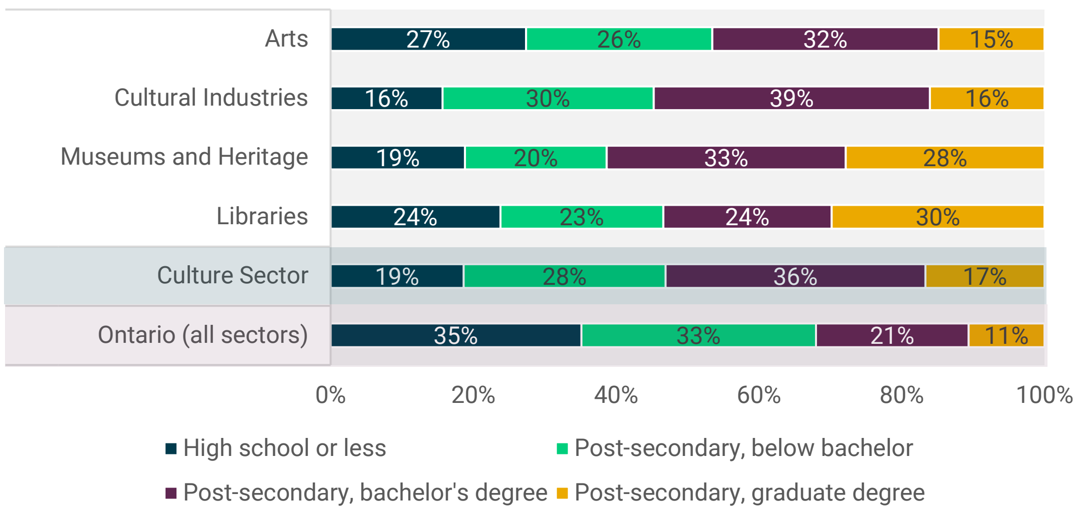


Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Although women are underrepresented in the workforce relative to the provincial average, it is worth noting that women are somewhat overrepresented in managerial occupations relative to the culture workforce overall. Conversely, women exhibit the lowest representation in creative roles, which may suggest that female workers face barriers to becoming established in these types of professions.

The chart below illustrates the highest level of educational attainment of the culture sector workforce by subsector.

Figure 16: Culture sector workers, distribution of headcount by highest level of educational attainment and subsector



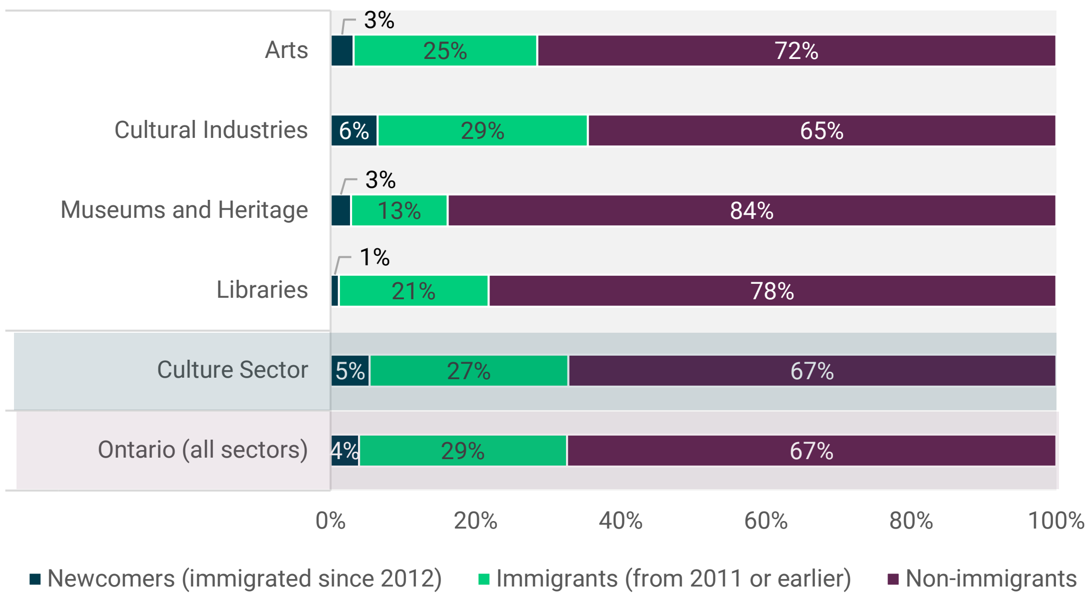
Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Overall, the culture sector workforce holds a significantly higher level of formal education than the average worker in Ontario. In fact, over four in five (81%) workers hold at least some kind of post-secondary credential (including certificates, diplomas, trades, etc.) compared to less than two in three (65%) workers in Ontario overall. Moreover, 53% of culture sector workers hold at least a bachelor's degree, compared with 32% in all sectors in Ontario.

Of the culture subsectors, museums and heritage, and libraries have the highest level of educational attainment, with 28% and 30% of workers holding graduate degrees, respectively. Museums and heritage also hold the distinction of having the highest percentage of workers with at least a bachelor's degree, at 61% of workers in that subsector.

The following chart breaks out the culture workforce by immigration status. For the purposes of this research, 'newcomers' were defined as immigrants who arrived in Canada in or after 2012.

Figure 17: Culture sector workers, distribution of headcount by immigration status (newcomers) and subsector

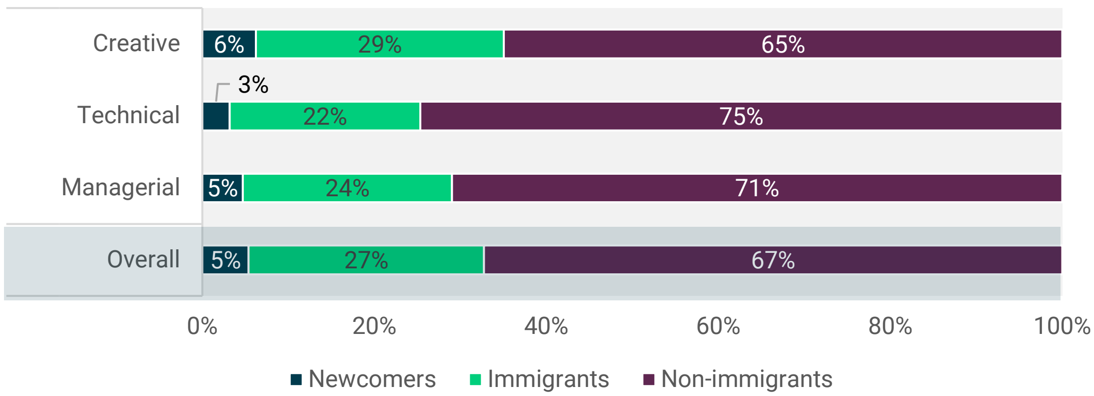


Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Overall, the culture workforce has 38% more newcomers than Ontario overall (5.4% compared to 3.9% in Ontario overall). Although newcomers are slightly overrepresented, the overall presence of immigrants is almost exactly in line with the overall average for Ontario. At the subsector level, newcomers and immigrants are underrepresented in all culture subsectors except the cultural industries. The lowest level of newcomer employment is in libraries, followed by museums and heritage, which also exhibited the lowest level of participation by immigrants overall.

The following figure shows the occupational function and immigration status for cultural workers:

Figure 18: Culture sector workers, distribution of headcount by immigration status (newcomers) and occupational function



Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

As illustrated in the figure above, newcomers and immigrants in the culture sector are most likely to hold creative occupations, followed by managerial and technical roles. This finding holds true across each culture subsector, with the sole exception of museums and heritage – immigrants (that arrived in Canada in or before 2011) are slightly less prevalent in creative roles in museums and heritage, although newcomers (since 2012) are slightly overrepresented in creative occupations in that subsector. There may be several reasons for this distribution, but to suggest these reasons here would be speculation, as further analysis is out of scope.

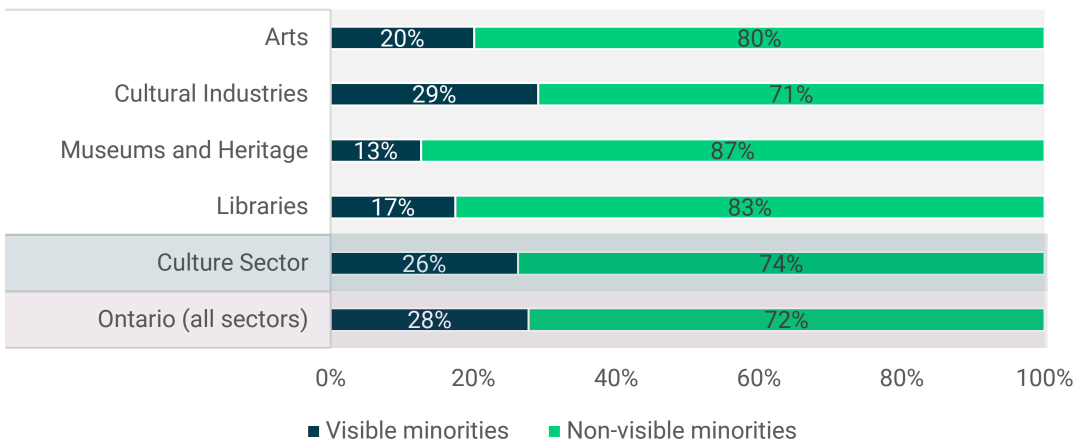
Immigration status is one indicator of the cultural and experiential diversity of the culture sector workforce, as well as its inclusiveness toward a potentially underprivileged group. The analysis of census data that follows looks at a variety of dimensions of diversity.[7]

The following chart shows the presence of visible minorities[8] in the culture sector.

[7] Unfortunately, the scope of data available for this study did not allow Nordicity to examine the employment of people with disabilities. As societal understanding of disability broadens, Statistics Canada has been challenged to reliably identify, define and collect data on the prevalence of disabilities. While the agency *does* collect information about disability through a census variable, the variable is not published due to ongoing growth in the prevailing perception of what constitutes a disability. Although the employment of people with disabilities is an immensely important feature of the culture sector, it was not possible within the scope of this study and based on the census data we have access to at this time. For more information please consult: "The evolution of disability data in Canada: Keeping in step with a more inclusive Canada" https://www150.statcan.gc.ca/n1/pub/89-654-x/89-654-x2018003-eng.htm

[8] "The Employment Equity Act defines visible minorities as 'persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour.' Categories in the visible minority variable include South Asian, Chinese, Black, Filipino, Latin American, Arab, Southeast Asian, West Asian, Korean, Japanese, Visible minority, n.i.e. ('n.i.e.' means 'not included elsewhere'), Multiple visible minorities and Not a visible minority." Sourced from Statistics Canada "Definitions and Concepts" Sourced from: https://www12.statcan.gc.ca/census-recensement/2016/ref/guides/006/98-500-x2016006-eng.cfm

Figure 19: Culture sector workers, distribution of headcount by visible minority status and subsector

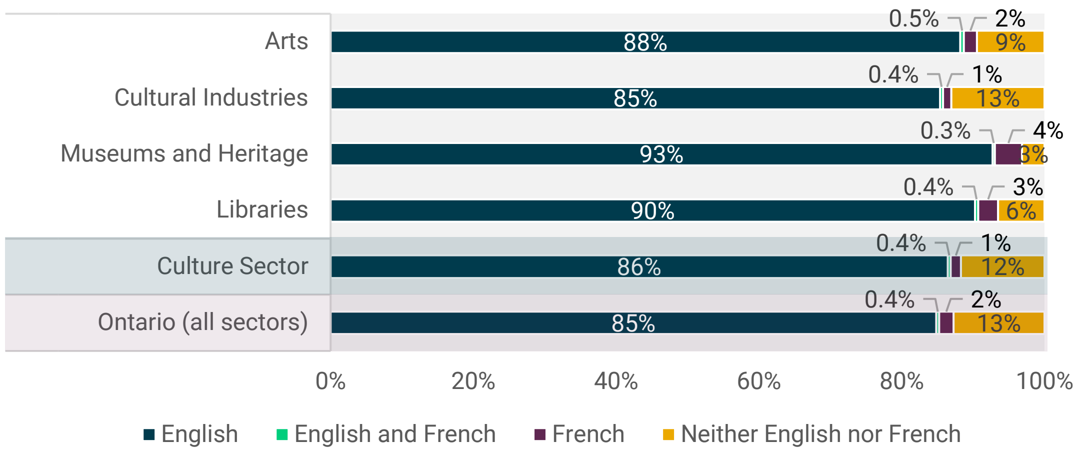


Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

While the previous chart shows that the share of immigrants in the culture sector slightly exceeds the overall average in Ontario, at 26%, members of visible minorities slightly lag the provincial average. At a subsector level, this data, as shown above, exhibits a similar trend as that observed among immigrants, with the highest rates of participation in the cultural industries, and the lowest overall participation in museums and heritage.

The following chart illustrates the language most often spoken at home among workers in the culture sector.

Figure 20: Culture sector workers, distribution of headcount by language most often spoken at home[9] and subsector



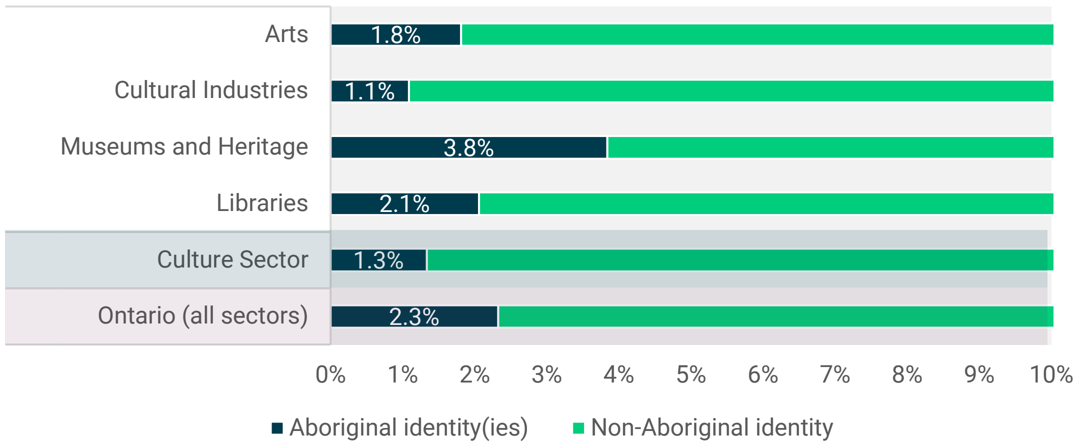
Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Overall, English is more prevalent among workers in the culture sector than workers in Ontario in all sectors. Note, however that there are some linguistic differences at the subsector level. Although English is much more prevalent in museums and heritage and libraries, the percentage of workers who speak French (or English *and* French) most often at home occur at rates higher than the provincial average. Conversely, French-speaking workers are least prevalent in the cultural industries; however, the cultural industries subsector is close to the provincial average in terms of workers who exclusively speak languages other than English or French most often at home.

As illustrated in the following chart, the culture sector has a lower level of participation of people who identify as Aboriginal than the Ontario workforce overall.

[9] The “English”, “English and French”, and “French” categories include workers that speak other languages in addition to English and/or French. As such, the “Neither English nor French” category represents workers that speak one or more languages most often at home, none of which is either English or French.

Figure 21: Culture sector workers, distribution of headcount by Aboriginal identity(ies)[10] and subsector



*Note that **the scale on this chart has been limited to 10%** to make the relatively small numerical values more legible. This presentation of data differs from that used in all other charts in this section.*
Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

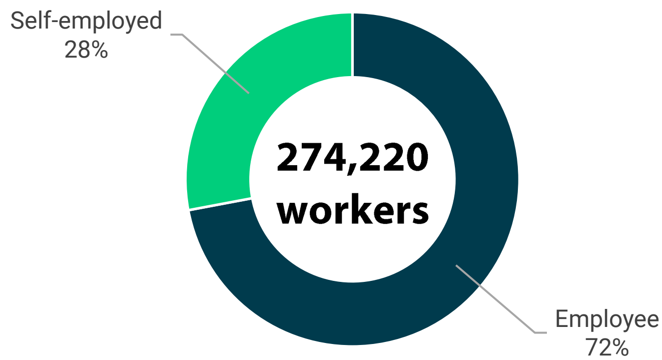
In contrast to the earlier findings noting the low rates of participation among immigrants and visible minorities, museums and heritage has a significantly higher representation of people who identify as Aboriginal. While arts and libraries are slightly below the provincial average in terms of Aboriginal participation, cultural industries have less than half the share observed in the overall Ontario workforce.

2.3 Mode of Work

The following chart shows that 72% of the culture sector workforce work as employees; the remaining 28% are self-employed.

[10] Statistics Canada's *Dictionary, Census of Population, 2016* states that "'Aboriginal identity' refers to whether the person identified with the Aboriginal peoples of Canada. This includes those who are First Nations (North American Indian), Métis or Inuk (Inuit) and/or those who are Registered or Treaty Indians (that is, registered under the Indian Act of Canada), and/or those who have membership in a First Nation or Indian band. Aboriginal peoples of Canada are defined in the Constitution Act, 1982, Section 35 (2) as including the Indian, Inuit and Métis peoples of Canada." https://www12.statcan.gc.ca/census-recensement/2016/ref/dict/pop001-eng.cfm

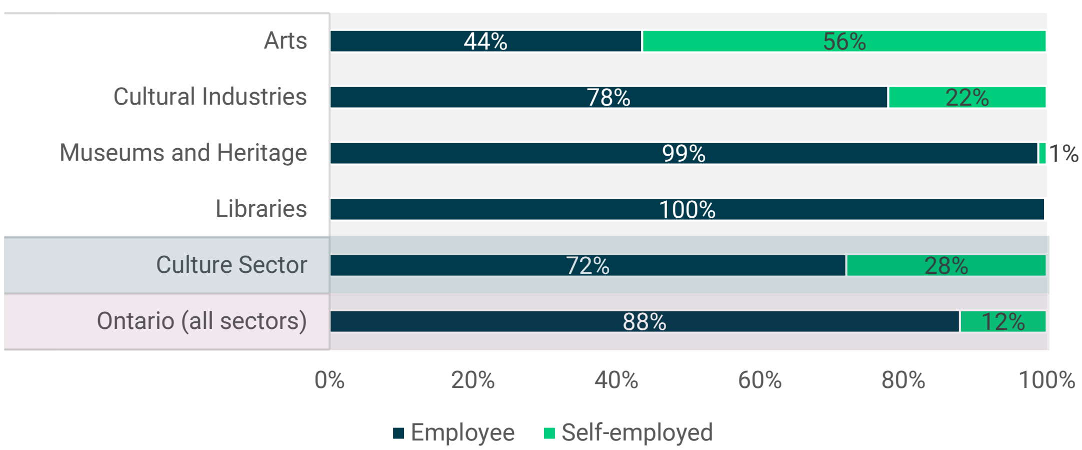
Figure 22: Culture sector workers, distribution of headcount by employee/self-employed workers



Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

The following chart breaks out employees and self-employed workers by subsector.

Figure 23: Culture sector workers, distribution of headcount by employee/self-employed workers and subsector

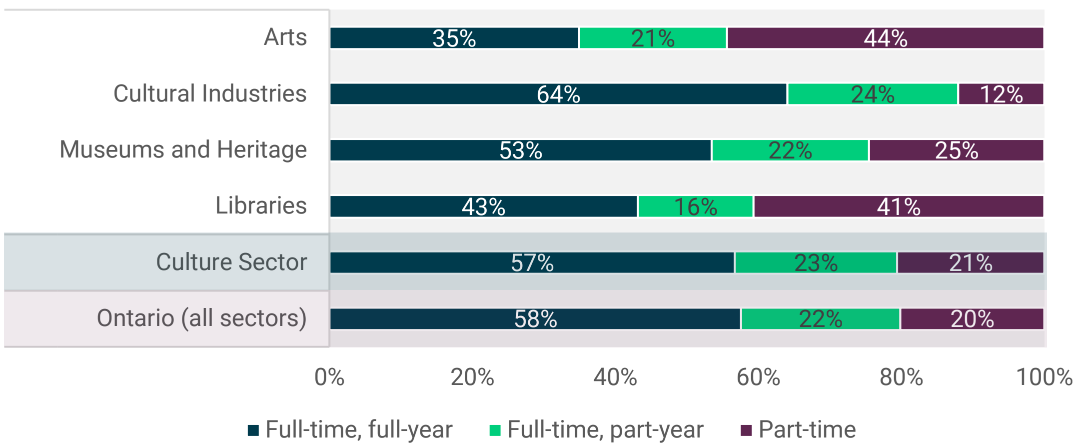


Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Across the cultural sector, workers in the arts are the most likely to be self-employed, with nearly half (47%) self-employed in their primary job. Self-employment drops to about one in five workers (22%) in the cultural industries, with only 1% of workers self-employed in museums and heritage and libraries. **Overall, the culture sector's rate of self-employment (28%) is more than double the average across all sectors in Ontario (12%)**. As one survey respondent pointed out, the culture sector can defy typical employee/employer classifications. Freelance artists and creative industry workers are self-employed, and creators are also often themselves employers of, for example, contract services. In this context, there is an evident demand for supports (e.g., financial planning, training, services) that meet the needs of a sector with a proportionately large share of self-employed individuals. With the gig economy becoming more pervasive across all sectors, the culture sector may indeed benefit from financial and other institutions' adapting to better address or understand this mode of work. Levels of volunteerism, board memberships and internships were not possible to extract from this data, and contract labour in institutional spaces (e.g., security or seasonal labour) are unlikely to be captured in this analysis.

The following chart shows modes of employment by subsector.

Figure 24: Culture sector workers, distribution of headcount by mode of employment and subsector



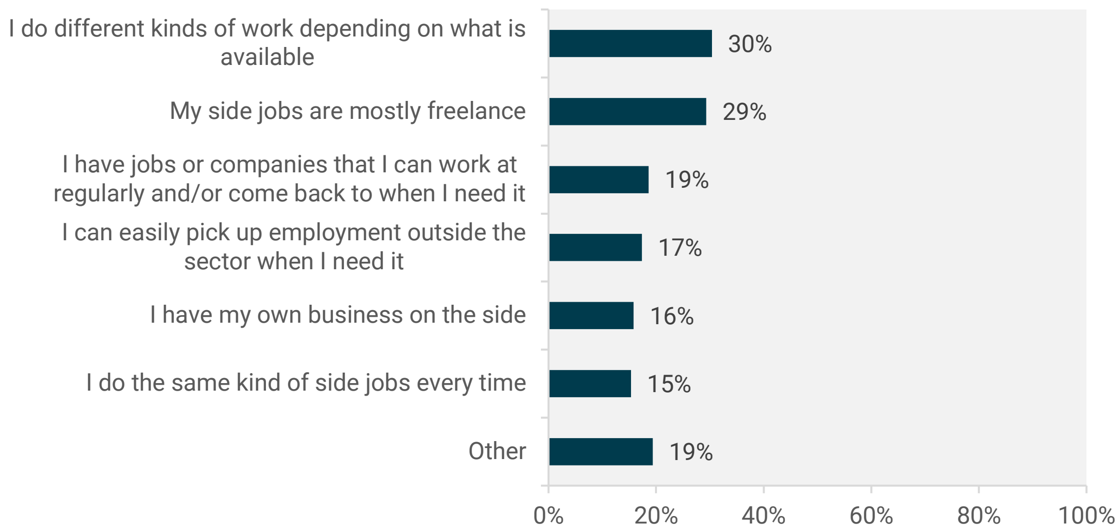
Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

The culture sector is notable for its similarity to the rest of the Ontario economy in this realm. Although the sector averages out to match all sectors, bear in mind that the cultural industries are the largest segment and tend to contribute most heavily to the culture sector average. The rate of full-time employment (which includes both the blue and green segments) is highest in the cultural industries (88%), which is the only subsector that exceeds the overall average in Ontario (79%), enjoying robust full-year, full-time demand. The lowest rates of full-time employment are seen in the libraries and arts subsectors, with only 56% and 64% of the workforce employed full-time, respectively.

Overall, 57% of the culture sector workforce is employed full-time for the full year. The remaining 43% of the workforce (approximately 118,725 workers) is engaged in a mode of employment that likely requires other types of work outside of the culture sector to supplement their income. This observation is consistent with modes of employment for all workers in Ontario, of which 58% worked full-time for the full year.

At this point, the analysis transitions from an emphasis on census data to survey data. The following chart illustrates the types of work that workers reported performing outside of their employment in the culture sector.

Figure 25: Work outside of the culture sector



Source: MakingItWork Survey, 2018 (n= 963)

Note: the survey question was "check all that apply" so responses do not sum to 100

The most prevalent responses to this question indicated that workers do different kinds of work depending on what is available, or mostly freelance jobs. The other notable aspect of these results is that about one in six workers (16%) reported that they have their own business on the side, suggesting that entrepreneurialism is prevalent among workers in the culture sector.

As far as unionization, 25% of respondents in the sample reported belonging to a union. It is important to note, however, that the underrepresentation of the cultural industries in the survey sample will have had an impact on that proportion. The cultural industries in Ontario (e.g., film and television workers) are more likely to be unionized than artists.

2.4 Income and Benefits

The following sub-sections draw on the Census and survey data to provide a snapshot of culture sector workers' income by the source of income, job function, as well as their outlook on future income growth. The section ends with a discussion of benefits provided to and desired by culture sector survey respondents. Note that in Section 3.4, such income data will emerge as the most in-demand area of labour market information sought by the cultural sector.

2.4.1 Income from the Arts

By one measure – i.e., the incomes provided by the census data - the average annual income *from all sources* for workers in the culture sector is **$58,400**. However, this figure is a somewhat misleading one given what we know of the sector, how it works, and the variability between each sub-sector and specialization. In this context, given that survey respondents mainly work in the arts, heritage and library sub-sectors, Nordicity adjusted the results of the census analysis to better represent the mix of subsectors in the survey sample. As such, based on the 2016 Census data, the average annual income is **$42,500**[11] from all sources for a population of "like workers" who responded to the survey. This result is consistent with the survey results, which yielded a $45,000 average annual income from all sources. Note that the average incomes for each subsector are broken out in the following section (2.4.2 Income by Function).

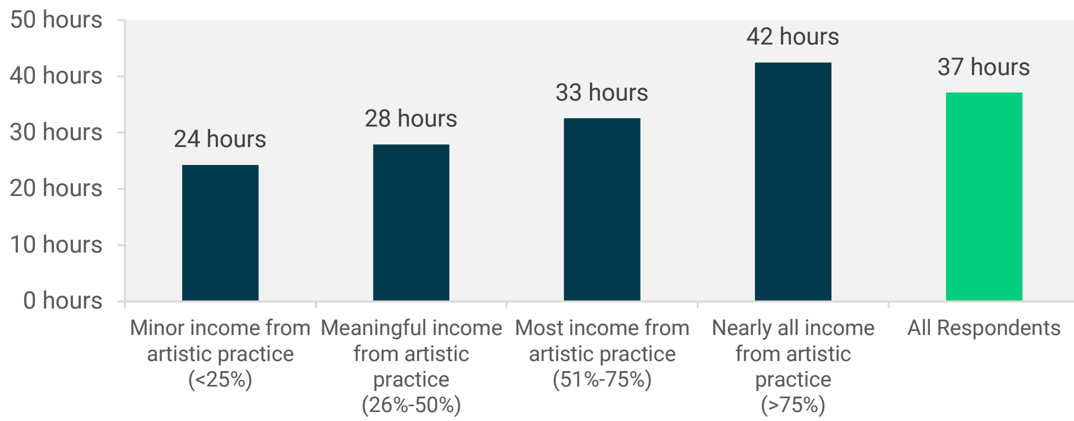
It should be pointed out that this figure overstates the average income of culture workers by virtue of the fact that these workers do not (on average) make all their income from culture-related activities. So, although the **$42,500** figure represents the overall annual income of arts workers, the average annual income **from arts-related activities was $34,200**, i.e., 80.3% of income from all sources. Again, this figure *excludes workers in the cultural industries subsector*. The upshot is that in the arts, many cultural workers seek to supplement their culture-related earnings with additional sources of income. When asked to specify other sources of income, survey respondents named sources such as:

- Teaching and/or substitute teaching;
- Pensions and/or other investment income;
- Participating in research studies; and,
- Rental property ownership.

Moreover, to pursue their cultural practices, workers often must balance the time spent on that practice with time spent on their other sources of income. To illustrate this balancing act, the following chart illustrates the portion of a 40-hour work week that workers spend on their cultural practices, broken out by the portion of their annual income generated from the culture sector.

[11] This adjustment weighs the cultural industries subsector at 10.7% instead of 70.0% to match the statistical data to the response rate observed in the survey sample. This approach was taken because the sample of workers in the cultural industries was not large enough for it to be considered statistically representative of the culture industries as a whole; since the survey data could not be adjusted upward, the census data was adjusted downward to make a "like-to-like" comparison.

Figure 26: Weekly hours spent on artistic practice (by % of income earned from culture)

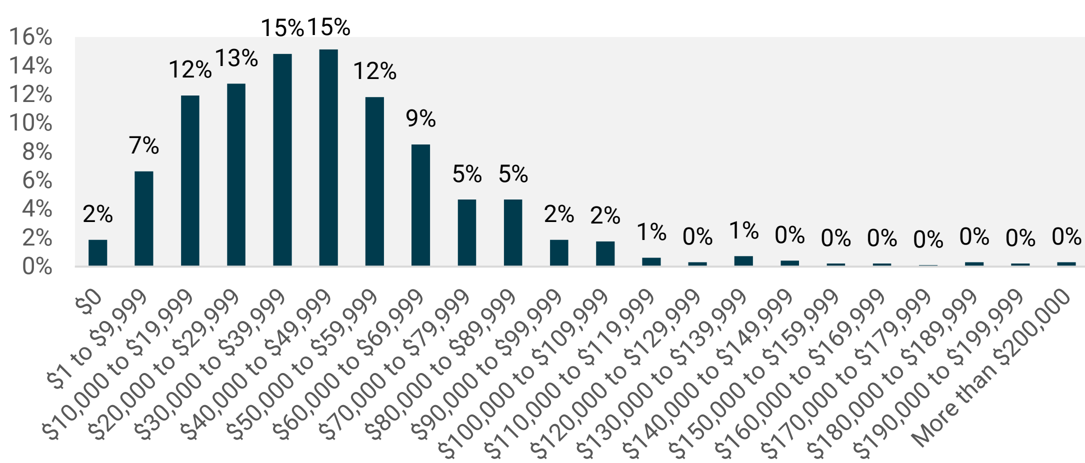


Source: MakingItWork Survey, 2018 (n= 963)

As the chart shows, on average respondents spend 93% (37 hours) of a typical 40-hour work week pursuing their cultural practices, which largely reflects the experience of full-time workers employed by arts organizations/institutions. However, as one moves to cultural workers that earn 50% or less of their income from cultural activities, **they still spend more than half of their week (24 hours) on their cultural practice.** Those earning more than three quarters of their income from culture spend, on average, more than 40 hours per week working.

The following chart illustrates how income from all sources are distributed among culture sector workers.

Figure 27: Income distribution (from all sources)



Source: MakingItWork Survey, 2018 (n= 963)

The curve depicted above indicates the majority of culture workers are clustered earning between $10,000 and $60,000 per year.

2.4.2 Income by Function

The following table breaks out average income from all sources by creative and non-creative occupational functions in each subsector. The range of income levels is immediately striking.

Table 5: Culture sector workers, average income from all sources by subsector and occupational function[12]

	Average Annual Income ($ from all sources), by Function		
	Creative Workers	Technical, Managerial, and Other	Overall
Arts	30,000	65,000	**35,900**
The Cultural Industries	61,200	73,900	**66,400**
Libraries	68,500	41,600	**48,700**
Museums and Heritage	51,800	37,700	**42,300**
Empl. across subsectors	43,700	50,000	**47,400**
Overall	**52,500**	**67,800**	**58,400**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Above we can see that:

- The range spans from $30,000 for creative workers in the arts, to $73,900 for technical roles in the cultural industries (likely driven upward by the inclusion of some software developers).
- On average, non-creative workers (including technical, managerial, manufacturing and educational functions) earn 29% more per year from all sources than creative workers.
- The income of creative workers varies significantly between culture subsectors, both in dollar terms and as compared to non-creative job functions.
- **The most striking feature of this data is that creative workers tend to earn less than their non-creative counterparts in the two largest subsectors: *the arts and the cultural industries*, whereas *libraries and museums and heritage* show the opposite trend.**

A number of issues or realities likely underpin the broad income range observed above. For example:

- **Scalability or lack thereof:** Although both subsectors focus on entertainment-based products, workers in the cultural industries enjoy an average income from all sources that is 52% higher than workers in the arts. In the arts, much of the sector's output is labour intensive – i.e., hand-produced products and/or live performances. As a result, products derived from the arts have limited scalability, and compensation tends to be low for creative workers ($31,500), such as artists, writers, and performers, relative to technical workers and managers ($67,800) in these fields. As in the arts, non-creative occupations in the cultural industries earn a 22% higher income than creative workers, however, creative workers earn nearly twice the average annual income of creative workers in the arts, so the

[12] Refer to **Appendix C** for more detailed breakouts of average salaries.

income gap between creative and non-creative workers is less extreme in the cultural industries.[13]

- **Institutional/organizational identities:** Libraries and museums and heritage exhibit a different dynamic than that observed in arts and the creative industries. In libraries, creative workers are, on average, the best compensated occupational function - $68,500. This figure represents nearly twice the average annual earnings of technical, managerial and other workers in libraries ($36,800). The reason for this dynamic is that librarian is the only occupation classed as creative in the library subsector and these workers tend to be very highly-educated (with 71% holding a graduate degree). On the other hand, junior and less skilled roles (library assistants and clerks, and library technicians) comprise a significant portion of the 'technical, managerial, and other' functions, in contrast to other subsectors which tend to include a more substantive management presence among non-creative workers.
  - A similar trend is evident in museums, in which highly educated creative workers such as conservators, curators, and archivists hold most of the creative jobs, in contrast to most non-creative jobs held by markedly less educated technical workers. Note that statistical occupational and industrial classification systems do not provide enough granularity to reliably identify managerial roles specific to libraries and museums and heritage.

Another way that the census data can provide insight into average incomes is by the size of urban centre, as illustrated in the following table.

Table 6: Culture sector workers, average income from all sources by subsector and size of urban centre

	Average Income (from all sources), by Size of Urban Centre			
	<100K	100K-500K	>500K	Overall
Arts	25,400	22,000	36,300	**35,900**
The Cultural Industries	44,400	52,600	68,600	**66,400**
Libraries	40,600	45,600	51,400	**48,700**
Museums and Heritage	35,800	29,300	45,400	**42,300**
Empl. across subsectors	12,600	32,700	48,800	**47,400**
Overall	**37,400**	**43,700**	**61,000**	**58,400**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

The overall trend shown above is that incomes are higher in the larger centres. In part, this likely reflects differences in the composition of occupational functions – for example, highly paid

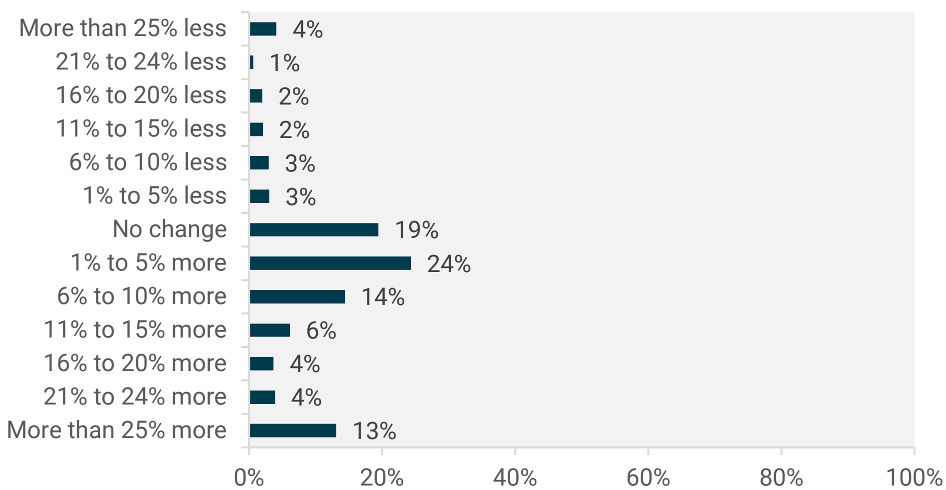
[13] Drawing from Nordicity's broad experience researching the cultural industries, it is important to note that the income data obtained through the census will include only workers whose *primary* source of work is in the culture sector, as noted in section 1.3.4. As such, the average incomes presented for creative workers may exclude certain workers that one would associate with the archetypical 'struggling artist' who primarily works in non-cultural occupations to support themselves. For example, this data would exclude an actor who has been working at a restaurant for the last five years to make ends meet while they actively audition for acting work, even though they might typically secure three significant acting gigs per year. In this example, the actor's *primary* occupation would be classified as their long-standing job in the restaurant industry. As such, this analysis may be biased toward overstating average incomes of certain segments of the culture sector workforce, particularly with respect to creative occupations that are subject to intermittent gig work.

managerial roles are likely to be more clustered in the larger centres. In reviewing the data above, it is also worth noting that the high percentage of workers in large centres means that the higher incomes in the >500K category tend to make the greatest contribution to the overall average for Ontario.

2.4.3 Income Growth

Emerging professionals, based on survey respondents with fewer than five years' experience in the culture sector, earn about **$35,500** per year, i.e., 20% less than the overall average for the culture sector. On average, workers in the culture sector reported an average income increase of 4% from 2015 to 2016. Note, however, that there was a great deal of variation experienced at the individual level. The following chart shows the distribution of survey responses about workers' change in income.

Figure 28: Percentage income change from 2015



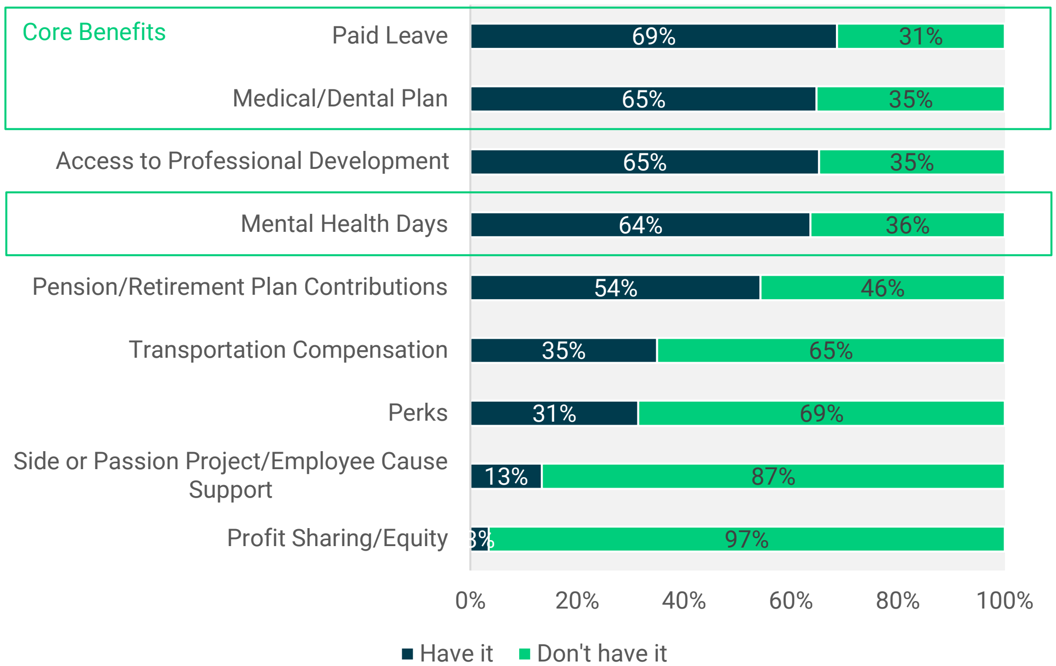
Source: MakingItWork Survey, 2018 (n= 963)

Slightly fewer than one in six workers (15%) experienced a decrease in their income over the previous year compared with about two in three (66%) who experienced at least a small increase. One in six workers (17%) reported an increase of more than 20%, roughly the same proportion (19%) that reported no change.

2.4.4 Benefits Held and Preferred

The following chart illustrates the availability or prevalence of employee benefits among workers in the culture sector. 'Core benefits' (illustrated in the green boxes below) were seen to be the trio of paid leave, medical/dental plans, and mental health days (including sick days).

Figure 29: Availability (or lack thereof) of employee benefits

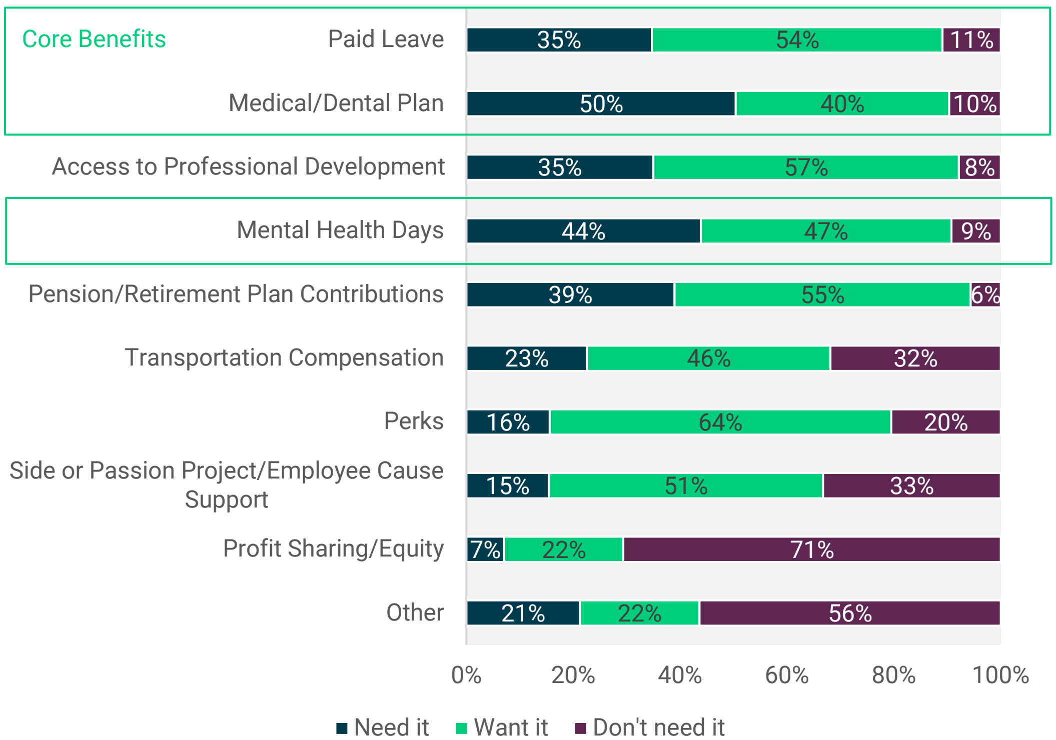


Source: MakingItWork Survey, 2018 (n= 963)

Overall, the core benefits are each held by over 60% of workers (note that survey respondents were asked about each benefit separately, so a larger than 60% share of the workforce has some combination of one or more of these benefits). After core benefits, nearly two thirds (65%) of workers have access to professional development and just over half (52%) of workers have employer pension/retirement plan contributions, with markedly lower shares reporting that they have other types of benefits. "Perks" relate to such miscellaneous benefits as employee discounts and gym memberships.

The following chart breaks out responses from workers who *do not* receive each type of benefit (e.g., the 30% of workers who do not have paid leave in the first bar above) to assess demand for each type of benefit. Note that the following chart uses the same sorting order as the preceding chart to facilitate side-by-side comparison.

Figure 30: Need/want for benefits among non-recipients (*reported by respondents that "don't have it" on the previous chart*)



Source: MakingItWork Survey, 2018 (n-values vary for each bar)

Overall, the preceding chart shows that the core benefits noted in relation to the previous chart are also the most desirable types of benefits among workers that do not already have them. The exception is Pension/Retirement Plan Contributions which are more highly needed and wanted than Access to Professional Development. Medical/dental plans, followed by mental health days, are the most desirable benefits for workers that do not already have those types of benefits.

As far as other benefits or supports, survey respondents frequently mentioned a desire for access to or support with:

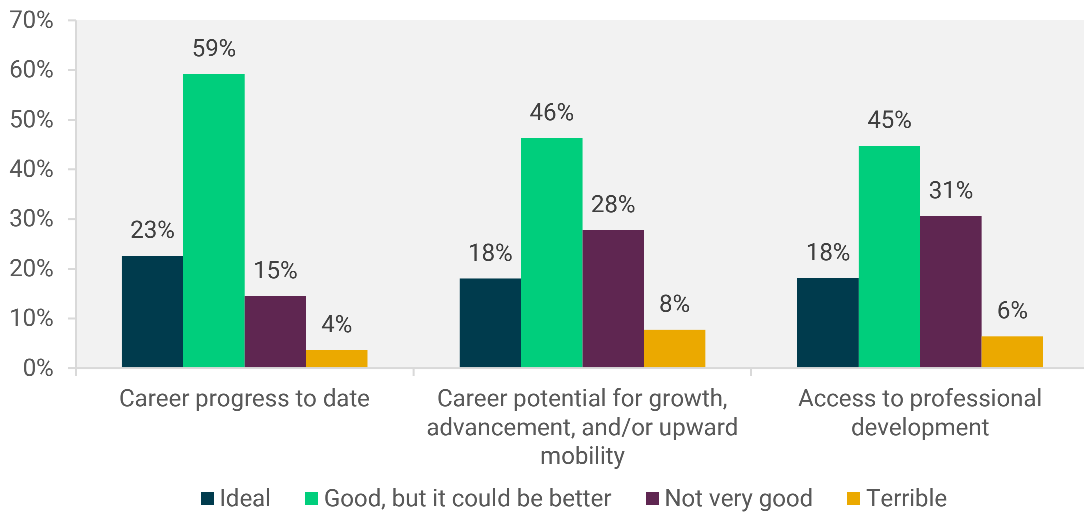
- Networking opportunities
- Employee Assistance Programs (i.e. programs assisting employees with personal and/or work-related issues that may impact their job performance, health, mental and emotional well-being)
- Sabbaticals and other professional development/motivational support
- Secondments (i.e., when an employee is assigned to another part of an organization – or another organization - for a temporary period to share experience).

2.5 Issues and Challenges Facing Culture Sector Artists and Workers

This section draws mainly on survey responses and the regional roundtables to provide a snapshot of the issues and challenges faced by individuals navigating their careers and/or developing their practice in the culture sector. A later section will look at these issues from the perspective of culture sector organizations and employers.

The first two clusters of bars in the following chart illustrate workers' opinions about their career progress to date and their outlook for the future.

Figure 31: Satisfaction with career progress, potential, and development



Source: MakingItWork Survey, 2018 (n= 963)

In the preceding chart, a comparison across the values represented by each bar shows a more pessimistic future outlook: workers who look forward to 'ideal' and/or 'good' career growth are fewer than the number that have experienced 'ideal' and/or 'good' career growth to date; whereas, the opposite trend is evident with respect to responses indicating 'not very good' and 'terrible'. **Overall, workers in the culture sector are relatively pessimistic about their prospects for career advancement**.

This sentiment, particularly regarding a lack of upward mobility in the sector, was echoed again and again during regional roundtables. Participants in the early or middle portion of their careers described frustration with a lack of advancement opportunities, explaining that career pathways for artists, culture workers, entrepreneurs, and arts administrators were not obvious locally and certainly not stable. Some regions described a top-heavy sector comprising executive directors at established institutions supported with junior staff and thus few opportunities for mid or senior management. Individuals in these regions find themselves faced with a) looking at other sectors locally or b) looking at larger culture hubs in the province in order to advance their careers, leading to local sector losses.

Although professional development is not the only route to career development in the culture sector, it is striking that workers' access to professional development - as illustrated in the third cluster in the preceding chart - correlates strongly to their outlook for future career growth. In contrast to workers' *relative* satisfaction with their career progress to date, this finding suggests that access to professional development may represent a significant barrier for workers in the culture sector to achieve satisfactory levels of growth in their careers.

The following figure shows the top three occupational issues reported by survey respondents.

Figure 32: Top 3 issues for cultural industry workers and artists (% of respondents)

Source: MakingItWork Survey, 2018 (n= 963)

The two most critical issues cited by survey respondents were related to low incomes (salary, rate of pay and cash flow) and poor work/life balance, while the third was lack of employment stability. Again, that these issues are critical was reinforced during the roundtable discussions. Burnout was described as "rampant" across the sector owing in part to an increasing demand to be available 24 hours a day, 7 days a week. Participants knew of few accessible resources for self-care. Importantly, this sense of burnout was described both by emerging and established culture sector workers and artists. The underlying context of job precarity and income instability were cited as major factors in the lack of work/life balance – demonstrating the inextricable nature of the top three issues facing individuals in the culture sector.

A fourth issue, "Awareness of the value of cultural and artistic products and services" was also highlighted in nearly every roundtable discussion around the province. In many communities, participants described a core challenge of communicating the value of cultural products and experiences as something "worth paying for." Whether to audiences and funders, or to governments and partners in other sectors, cultural sector workers and artists experienced a lack of recognition for their time, effort and expertise. At best it was a sense of being taken for granted, at worst a fear of being taken advantage of. The value gap was perceived to underpin many of the challenges and issues faced by the sector and is vital context for the issues discussed throughout this report.

2.6 Summary of Findings – Ontario's Culture Sector Workers

Based on an analysis of a custom data tabulation from Statistics Canada's 2016 Census, Nordicity estimates that there are **274,220** individual workers working full or part time in Ontario's Culture Sector. In combination with the survey responses received from artists and culture sector workers, we can observe that the sector is:

- **Younger (slightly) and more concentrated in large urban centres** than the overall workforce in Ontario.

- **Populated by slightly more men than women**: Women are slightly less prevalent in the culture sector workforce (44%) than in Ontario overall (48%). A sector exception is in libraries where some 84% of the workforce are women.
- **Highly-educated**: Four in five (81%) culture sector workers hold at least some kind of post-secondary credential compared to about two in three (65%) workers in Ontario overall.
- **Relatively inclusive of newcomers to Canada, but not especially diverse**: Overall, the culture workforce has 38% more newcomers than Ontario overall but of a very small base (5.4% compared to 3.9% in Ontario overall). **Importantly the culture sector is not any more diverse than the province's workforce**: participation of persons of colour/members of visible minorities as well as people who identify as Indigenous slightly lag the provincial average. Culture sector workers are more likely to speak English at home than workers in Ontario in all sectors.
- **Earnings range widely and arts workers need to supplement their income:** When cultural industries are excluded, arts workers earned an average of **$34,200** per year from arts-related activities. Their overall average income is **$42,500**, **but only 80% of it is from arts-related activities**. Creative workers tend to earn *less* than their non-creative counterparts in the two largest subsectors: the arts and the cultural industries. However, workers in libraries and museums and heritage show the opposite trend. They earn more than those classified with lower rung jobs in those institutions.
- **Time spent on artistic practice is consistently high:** On average, culture sector workers spend a significant amount of time working on their artistic practices versus other income-producing employment. For example, workers earning 25% or less of their total income from the culture sector still spend the equivalent of 61% of a 40-hour work-week on their artistic practice.
- **Seeking sustainability:** The three most critical issues facing culture sector workers, as cited by survey respondents, were 1) salary/low income; 2) lack of work/life balance; and 3) lack of employment stability. Organizations similarly ranked keeping pace with salary expectations and work/life balance among the top issues they face.
- **The 'core benefits' of paid leave, medical/dental plans, and mental health days are granted to over 60% of culture sector workers**. According to survey respondents, nearly two thirds (65%) of workers have access to professional development and about half (52%) of culture sector workers receive employer retirement/pension plan contributions.

Finally, **"Awareness of the value of cultural and artistic products and services"** was an oft-cited challenge across the province. Whether to audiences and funders, or to governments and partners in other sectors, cultural sector workers and artists experienced a lack of recognition for their time, effort and expertise. The challenge of how to communicate the value of cultural products and experiences as something "worth paying for" weighed heavily on roundtable participants. Recognizing this value gap was perceived to be vital context for the issues and recommendations in this report.

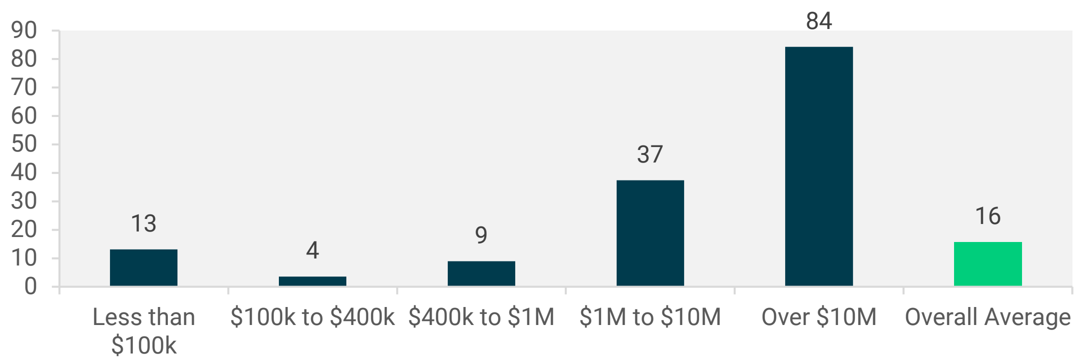
3. Ontario's Culture Sector Organizations and Workplaces

This section draws on culture-sector company survey responses to explore an organizational perspective on the culture sector labour market. It covers topics ranging from organizational capacity, approaches to managing human resources, and benefits of access to labour market information.

3.1 Organizational Capacity

The following chart illustrates the distribution of average headcounts for organizations based on their annual operating budget.

Figure 33: Average headcount by annual operating budget

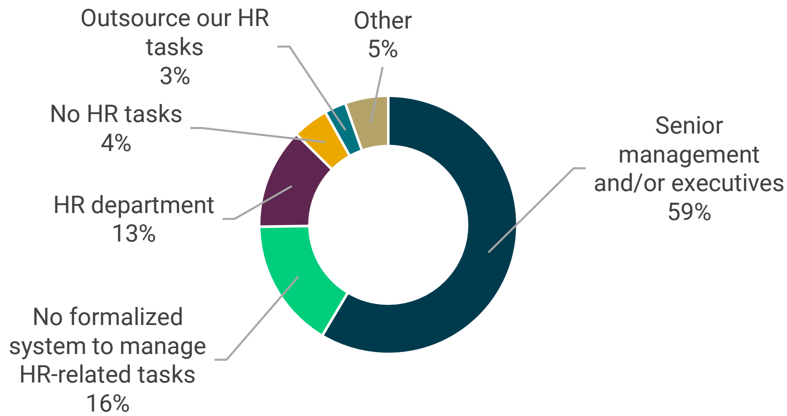


Source: MakingItWork Survey, 2018 (n= 124)

The most striking feature of this data is that the average headcount tends to have a positive correlation with the average operating budget for organizations with a budget of over $100,000 per year, but organizations with a budget of less than $100,000 have a large number of employees. This finding suggests that the very smallest organizations are more likely to hire a greater number of part-time or temporary workers (or sub-contractors) to meet their staffing and/or business needs (e.g., accounting).

The following chart illustrates how organizations administer their human resource-related tasks.

Figure 34: HR practices



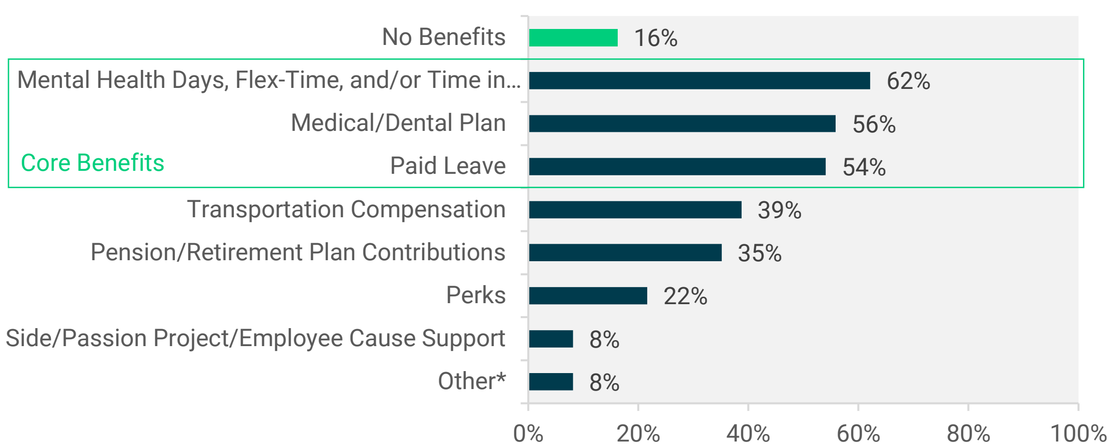
Source: MakingItWork Survey, 2018 (n= 124)

The majority of organizations (59%) in the culture sector, according to our survey, assign HR tasks to senior management or senior executives. Just 13% have a dedicated HR department or resource in-house (coupled with 3% that outsource HR). Some 16%, or about one in seven organizations have no formalized system or approach to managing HR-related activities. The assumption is that organizations increasingly professionalize their HR practices as they accumulate a larger workforce, first shifting informal practices to senior management, and then moving those responsibilities to a formal HR department.

3.2 Benefits Provided

The following chart provides employers' perspective on benefits, which parallels a similar question asked of workers in Section 2.4.3 (Figures 29 and 30).

Figure 35: Benefits typically offered employees



Open-ended write-in responses indicated that "other**" benefits provided by employers included free admission to events, accommodation for travelling artists, and professional association fees.*
Source: MakingItWork Survey, 2018 (n= 124)

Overall, the results are quite similar to those provided by employees, with ‘core benefits’ of mental health days, medical/dental plans and paid leave ranking highest among the benefits provided. The largest discrepancy between workers and employers’ responses related to pension/retirement plan contributions (52% of workers reported having this benefit, whereas only 35% of employers provide it); this finding suggests that it is the organizations employing the largest share of the workforce that are most likely to offer pension/retirement plans.

> “Despite the extraordinary, imaginative, and powerful work they create, it’s not easy being an arts organization these days. [They] face significant challenges: inadequate and unpredictable funding, fatigued and under-resourced staff, and a rapidly changing environment that throws traditional strategies into question. Additionally, the arts sector must address the implications of changing audience demographics, shifts in how culture and entertainment are purchased and consumed, and a widening gap between the explosive increase in art practices and limited sources of available revenue. Across all of civil society, organizations are searching for innovative solutions to the enduring problem of financial resources.”
>
> Elizabeth MacKinnon and Christine Pellerin, More Than Money: How Social Finance Can Build Resilience in the Arts Sector, Metcalf Foundation (January 2018)

3.3 Issues Facing Cultural Organizations and Clusters

Over and over, roundtable participants lamented that day-to-day and year-to-year survival is still top of mind for many artists and arts organizations. Coupled with the previously described challenge of communicating the worth of cultural products and experiences to audiences, funders, governments and partners in other sectors, this creates a vicious cycle depressing the value perception of the sector and threatening its sustainability. The challenge is described by MacKinnon and Pellerin in their publication “*More than Money: How Social Finance Can Build Resilience in the Arts Sector* quoted at the right. The authors suggestion that “traditional strategies” seem increasingly ineffective and the search for innovative solutions is widespread was also expressed by roundtable participants. Some suggested that the funding model in the culture sector needs major disruption.

The following icons depict the top three issues reported by cultural organizations in the survey.

Figure 36: Top 3 issues for cultural organizations

Keeping pace with salary expectations	Managing overall operations	Work/life balance
58%	60%	50%

Source: MakingItWork Survey, 2018 (n= 124)

Notably, two out of the three top ranked issues (keeping pace with salary expectations and work/life balance) corresponds with the two top ranked issues for workers (salary/rate of pay/cash flow and work/life balance), as illustrated in Section 2.5. Respondents also mentioned the issue of “Advocacy for your sector/access to industry supports.” This issue relates to the notion of needing new strategies for promoting the culture sector to governments, funders and other potential partners. The final three categories relate to recruiting and retaining talent, but of course, the top challenge of keeping pace with salary expectations would be a major factor in successful recruitment and retention.

While not covered in the survey, during roundtables, stakeholders described that partnerships and networks were well-developed *within* sub-sectors (e.g., museums are linked to their local, provincial and even national counterparts/networks), but expressed a desire for greater cross-sectoral connectivity across the province. Similarly, many regions described a need for stronger connectivity between *emerging* and *established* organizations but suggested that occasionally tensions emerged in these relationships. Finally, in many communities, the culture sector exists in the shadow of other larger sectors (tech, finance, health) – creating challenges and competition but also fueling a desire to learn how to forge/foster stronger partnerships *outside* of the culture sector.

Other challenges described in the survey and roundtables included:

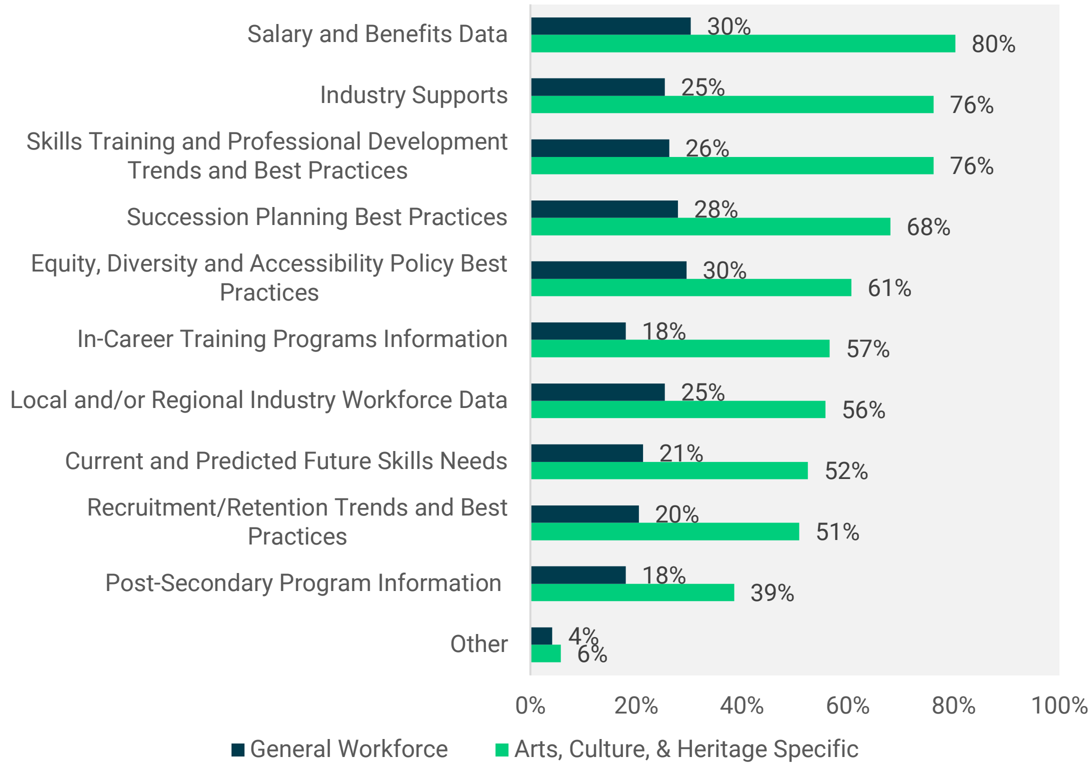
- Lack of funding either for additional staff or for investing in internal resources and capacity
- Marketing (i.e., low budgets, skills-needs, successes and failures)
- Low availability of volunteers
- Time management (e.g., burnout, work/life balance)
- The value gap, e.g., “Proving our services are vital to the sector and deserving of granting support” and challenges of communicating that a career in culture is a ‘real career’
- Need to formalize HR practices
- Evolving job descriptions and general challenges around recruitment and retention

The interconnected nature of the issues and challenges facing cultural sector organizations is striking and reinforces the potential for a cross-sectoral, common and critical strategy for addressing them.

3.4 Labour Market Information

The MakingItWork report is itself a labour market information study, providing a baseline of analysis for the culture sector. Looking ahead, there may be other ways to gather and share such information, and indeed other kinds of information desired by the sector. The following chart illustrates the labour market information that is most in demand among organizations in the culture sector. The blue bar below shows the share of respondents who indicated that general labour market information would suffice for a given dataset or type of data. The green bar shows the share of respondents who indicated that having that type of labour market information specific to the culture sector would be most valued.

Figure 37: Labour market information sought



Source: MakingItWork Survey, 2018 (n= 124)

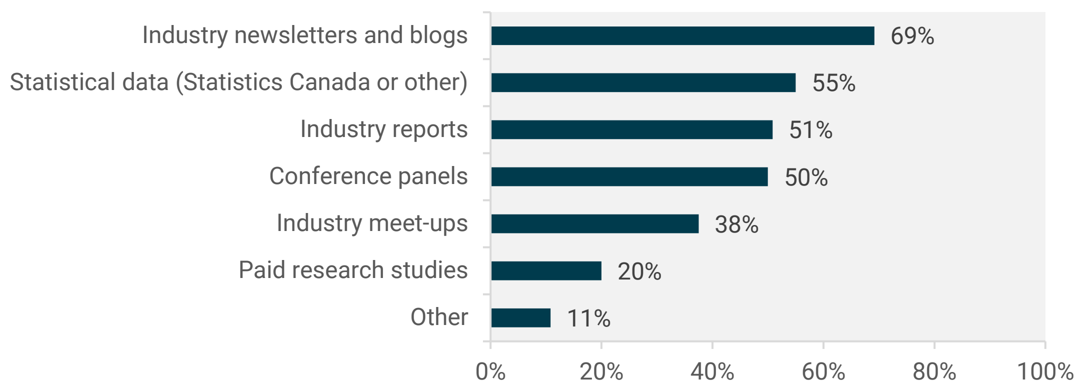
The top ranked labour market information needed in general, and specifically for the arts, culture and heritage sectors, is salary and benefits information. This finding is consistent with both individuals and employers ranking compensation-related issues as their top concern. As an aside, WorkInCulture has taken an important step towards salary transparency by asking job posters to indicate a salary range for new posts to the Job Board.

For most types of information, it is clear that employers would prefer to access data which is specifically tailored to the culture sector. For salary and benefits and equity, diversity and accessibility policy best practices, and succession planning, general data is also of interest. When it comes to equity, diversity and accessibility policies, we will see later that many organizations have yet to make concrete progress toward defining and achieving diversity goals. Other types of information highly ranked include industry support information, skills training and professional development intelligence.

Labour market information access and availability was also discussed during the regional roundtables. Of note, once again, was the desire for data that communicates the value of the sector and the contribution arts and culture make to the economy, citizen's well-being and social welfare as well as the very fabric of the province – in other words that positions the culture sector and its stakeholders for success as they demonstrate their varied impacts. Further, any labour market data that could enable collaboration, resource-sharing and networking across the sector as well as greater labour market transparency would be welcome. Such data might include culture sector salary benchmarks, best practices regarding benefits (e.g., monetary and non-monetary), as well as any intelligence about the implications of trends such as the gig economy and automation on the culture sector workforce. Also of interest in some regions was exploring greater use of credentials in the culture sector, that is to say, a better understanding of post-secondary institution programs, training certifications, software systems and other relevant qualifications. Greater awareness-building and coaching for grants and other financial supports would also be appreciated.

The following figure shows commonly used sources of labour market information by survey respondents.

Figure 38: Commonly used sources of labour market information



Source: MakingItWork Survey, 2018 (n= 124)

Survey respondents currently obtain labour market information mainly through industry newsletters and blogs, followed by statistical data, industry reports, conference panels and industry meet-ups. Only 20% of organizations reported using paid research reports to learn about the industry. As for the “other” category, respondents mentioned sources such as:

- Peers, conversation with colleagues
- Boards of trade
- Consultants
- Free online resources/templates for not-for-profit organizations
- Industry associations

Overall, there was generally agreement in roundtable discussions that the sector needs a designated organization to collect and collate labour market data and information to help inform the culture sector.

3.5 Summary of Findings

The previous section examined the sector from the perspective of cultural workers. This section took the lens of cultural organizations.

- **As cultural organizations grow, processes become more formalized, but all organizations have a lot to manage as far as business and HR concerns:** Employment at organizations generally correlates with the size of operational budgets, except for those with budgets of less than $100,000 per year. These organizations employ an average of 13 workers which suggests a heavier reliance on part-time and temporary workers (or possibly higher turnover rates) to meet their staffing needs. As employers grow, they increasingly professionalize their HR practices. Although organizations of all sizes use a variety of HR practices, the typical progression involves the development of informal HR practices, which are then assumed by senior management, and finally, these responsibilities are taken on by a formal HR department.

The lack of awareness of the value of cultural and artistic products and services certainly underpinned many of the discussions and findings within this organizational perspective. Other shared challenges and areas of alignment emerged, including:

- **Two out of the three top ranked issues by organizations - keeping pace with salary expectations and work/life balance - correspond with the two top ranked issues for workers**
- **The top ranked labour market information for employers and employees alike is salary and benefits information**

Employers are also in significant need of **data related to equity, diversity and accessibility policy best practices.** The interconnected nature of the issues and challenges facing cultural sector organizations is striking and reinforces the potential for a cross-sectoral strategy for addressing common and critical issues.

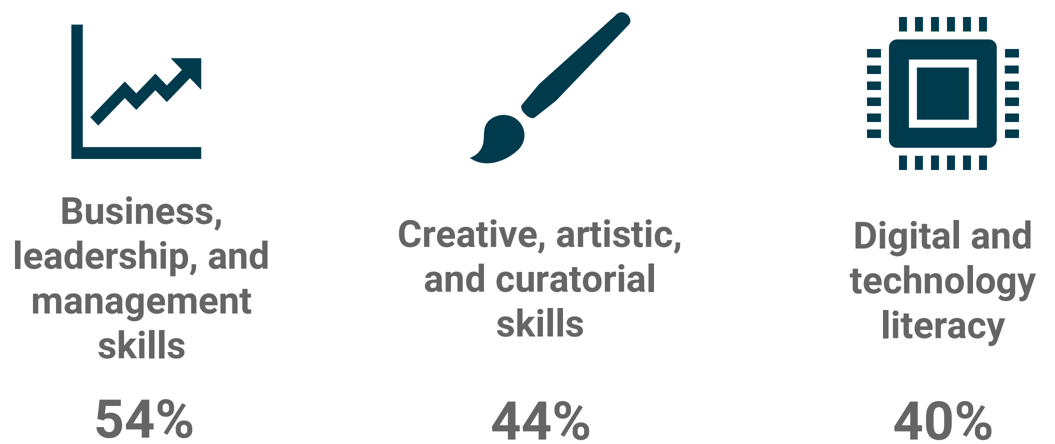
4. Skills and Training Needs and Barriers

Providing a stronger understanding of what skills are needed and what training is preferred by the culture sector is one of the core objectives of this report. This section draws on survey analysis and roundtable discussions to understand what skills are in demand and what barriers stand in the way of achieving success.

4.1 Skills Needs

Skills needs are presented across the following three sets of visuals. The icons below depict the three skills cited by workers as being crucial to their careers:

Figure 39: Skills workers think to be crucial to their success



Source: MakingItWork Survey, 2018 (n= 963)

The skill areas reported by workers as being most crucial to their success are the business, leadership and management suite of skills, followed closely by creative, artistic and curatorial skills and digital and technology literacy. Other skills in demand cited by survey respondents included:

- Communication/Public Engagement and PR skills
- Archival/Record-keeping skills
- Customer Service skills
- Teaching skills

The following icons depict the skills organizations prioritize from workers.

Figure 40: Top 3 organizations' skills priorities

Business, leadership, and management skills	Marketing skills	Creative, artistic, and curatorial skills
56%	53%	42%

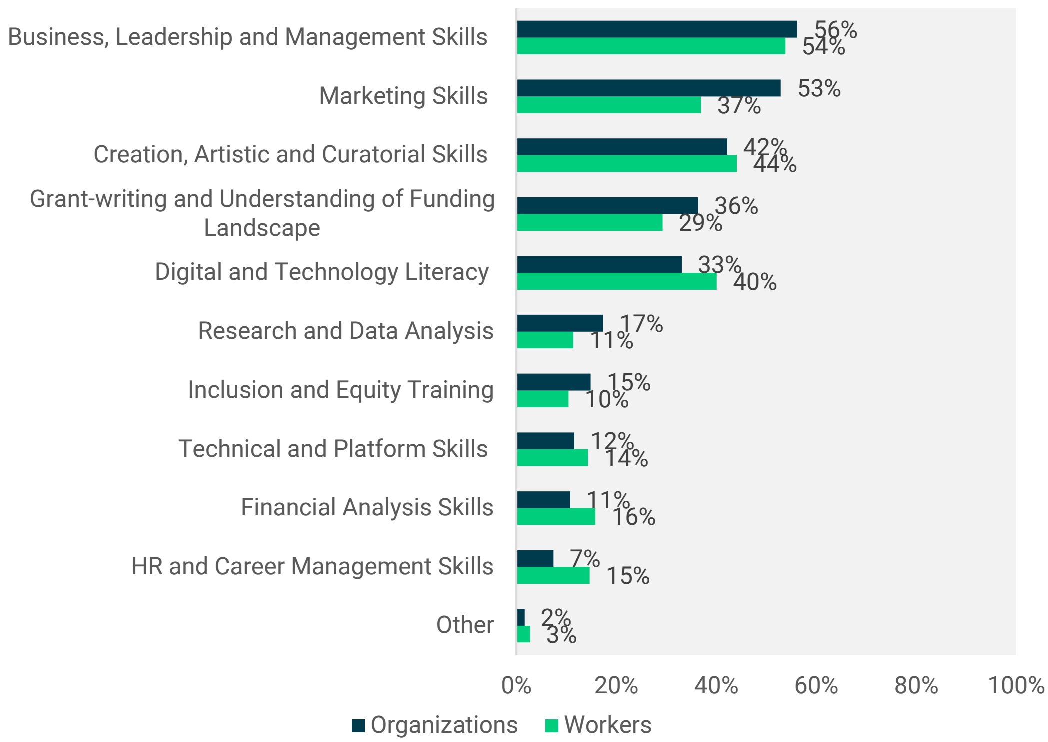
Source: MakingItWork Survey, 2018 (n= 124)

Again, Business, Leaderships and Management skills are ranked as the most in-demand, this time followed by marketing skills. Roundtable discussion reinforced the need for the suite of business entrepreneurship and management skills including:

- Financial Management and Accounting skills
- Audience Development and Public Engagement skills – For smaller regions and for organizations in downtown Toronto, learning how to reach audiences beyond or outside an organizations' core market (e.g., geographic market and/or core fanbase) was described as an area for skills development
- Succession Planning and Governance was also regularly cited as a perennial concern for cultural organizations of all sizes

The chart below compares the skills needs ranking on the part of individuals and organizations responding to the survey.

Figure 41: Skills needs and priorities compared



Source: MakingItWork Survey, 2018

Skills need mismatches shown above may well contribute to some challenges in recruitment and retention. For example, overall, the largest gap between employers and employees' responses was with respect to marketing skills. This gap could represent a barrier to employees' career growth if they are unaware that marketing skills are an important consideration from the perspective of employers.

Employers also reported a higher demand for "grant-writing and understanding of the funding landscape" as well as "research and data analysis skills" than workers, whereas workers placed a higher demand on "digital technology and literacy" and "HR and career management skills" than employers. That being said, despite a slight difference in rankings, organizations and workers selected the same top five skills needs overall.

During the roundtables a major theme, building on the labour market information discussed previously, was developing greater, more sophisticated capacities for the advocacy, pitching and fundraising suite of skills – described as "levelling up." Organizations of all sizes described wanting to encourage and support the development of more sophisticated, ambitious skill levels and strategies in this area in order to take a major leap forward in their abilities to successfully pitch, fundraise and describe their activities and impacts.

Roundtable participants repeatedly identified board management and governance as areas in pressing need of new approaches and/or support with managing the time and resource burdens. Organizations described board management challenges ranging from low-level administrative headaches and inefficiencies, to feeling unsupported and undermined by arts and culture boards. The sector, collectively, wants to advance these skills as a direct response to the value gap and funding shortages it experiences.

One roundtable discussion included the question of whether it was even possible to isolate single skill areas as in-demand, saying, “the days when a lack of digital skills was the most pressing concern feels like a simpler time. Today skills development is more of a holistic issue.” Many reported the challenge of asking leaders to “do it all” weakens the sector, citing the example of artistic directors functioning as managing directors and HR managers, without the necessary skills and training.

4.2 Training Needed, Supported, and Desired

The following chart illustrates the ways in which employers support the professional development of their staff.

Figure 42: Employer support for staff training

Source: MakingItWork Survey, 2018 (n= 124)

Nearly three quarters (74%) of employers reported providing time for employees to access external training that they need, nearly two thirds (65%) provide professional development support within the organization, and nearly as many organizations (63%) provide financial support for staff to access external training. Although these statistics bode well for culture sector workers looking to upgrade their professional skills, one in 10 organizations reported that they take no part in employee training, indicating that at least some portion of the employed workforce is not receiving support to bolster their professional skills. As access to training is constrained by time and money, organizations reported spending on average **$6,100 per company** on training (or **0.4% of the average annual budgets**).

The following chart illustrates workers’ preferred learning styles. Those that can be considered “face-to-face” (or with “face-to-face” elements) are indicated with an asterisk.

Figure 43: Culture workers' preferred learning styles

Learning Style	Share of Responses
Conferences, workshops, seminars or lectures*	26%
Mentors*	15%
Formal academic/ accredited training*	15%
Peer-to-peer learning*	12%
Online courses/materials	9%
Independent research	8%
Formalized industry-led training	7%
Apprenticeships and/or mid-career fellowships*	6%
Informal meet-ups*	2%

Source: MakingItWork Survey, 2018 (n= 963)

The most prevalent single category of learning preferred by workers was "conferences, workshops, seminars, or lectures, as reported by slightly over a quarter of workers (26%). Altogether, formal education (including academic/accredited training and formal industry-led training) was preferred by slightly more than one fifth (21%) of workers, and on-the-job training (including mentors and peer-to-peer learning) was cited by 27% of workers. Independent learning (including online courses and independent research) was preferred by 17% of workers.

One issue that emerged during roundtables was the lack of recognition for the work cultural workers contribute to research and resource-sharing, for example by participating in roundtables, speaking on panels, providing mentorship, giving feedback on course material etc. As with the perception of value of cultural products and experiences, some participants expressed concern that their time and expertise was not valued e.g., in the form of an honorarium. An important point learned over the course of this research, was the need to help build an understanding of value, respect and opportunity cost in all aspects of the sector.

4.3 Barriers to Accessing Training

The following icons depict workers' three most-cited barriers to accessing training.

Figure 44: Barriers to training (for workers)

Cost of programs/ courses	Time to take programs/ courses	Location of programs/ courses
79%	67%	31%

Source: MakingItWork Survey, 2018 (n= 963)

The top barrier cited by workers, the cost of programs and courses, is consistent with the common issues related to compensation that have been highlighted throughout previous sections of this report. Notably these barriers did not vary discernibly by age category of survey respondent and were far ahead of other issues including location and/or awareness of programs and courses.

Survey respondents did expand with some additional comments about barriers to accessing training. For many, ageism was cited as a barrier with one respondent saying, "A program or concentrated effort to provide those 45+ with opportunities that have substance would really go a long way to create a more balanced and healthier work environment." Another said that they feel "unclear what kind of professional development is needed to move forward."

The age and/or lifecycle theme emerged in roundtable discussions too, particularly in regions outside of Toronto, where some participants observed that many training resources, funding and grant-programs are geared towards younger workers (e.g., youth and under-30s) launching their careers and/or cultural start-ups. In other words, basic, 101-level training, and/or funding to hire new graduates appears to be relatively available. Similarly, there are resources available at the executive level, for those in more established leadership positions. Many regional stakeholders described gaps in the "middle zone" of career planning, however, and challenges locating the necessary skills to support mid-career development such as specialized master-classes. As one survey respondent explained regarding barriers, "Most programs are geared towards emerging artists. I need advanced programming. Creative programming. Practical, business-related programming."

Another area that presents a significant challenge is that of bi- or multilingualism. In some cases, the need to be bilingual – or to speak French - is a major barrier to getting hired or advancing one's career in the culture sector. Regions where the ability to speak French is in higher demand noted that a lack of bilingualism can lead to silos and block partnerships and collaborations in the culture sector. From the other perspective, French-speakers in those regions report major frustrations with the lack of resources and training available and stronger connections with French-speakers in other regions (e.g., Sudbury, Kingston and Ottawa) than with the culture sector in their own cities or towns.

4.4 Summary of Findings

In the survey, **Business, Leadership and Management Skills**, which are notably the areas of WorkInCulture's core mandate, were reported to be **the most in-demand by both culture-sector organizations and workers.** Over the course of roundtable discussions, this large grouping was unpacked to reveal many specific areas needing skills upgrades or "leveling up":

- Employers reported a higher demand for "grant-writing and understanding of the funding landscape" as well as "research and data analysis skills" than workers, whereas workers placed a higher demand on "digital technology and literacy" and "HR and career management skills" than employers. **That being said, despite a slight difference in rankings, organizations and workers selected the same top five skills needs overall.**
- The sector expressed a need for support developing more sophisticated capacities as far as the advocacy, pitching and fundraising suite of skills.
- Board management and governance were raised repeatedly as areas in pressing need of new approaches and/or support with managing the time and resource burdens.

The sector, collectively, wants to advance these skills as a direct response to the value gap and funding shortages it experiences.

When it came to types of training, the sector seemed open to a wide variety of learning opportunities and modes, but consistently **found greater success with face-to-face training**.

- Although 63% of employers provide financial support for employees to pursue professional development (on average $6,100 per company), **one in 10 organizations reported that they take no part in employee training**.
- The top barrier to accessing training, according to workers, is **the cost of programs and courses, followed by finding the time to pursue professional development**.

Exploring the potential of supporting greater access to affordable, online training modules would necessarily be part of overall professional development and training strategies. If not, there may be a significant portion of the culture sector workforce at risk of falling behind their peers.

5. Focus on Diversity, Equity and Inclusion in the Culture Sector

For WorkInCulture, taking a closer look at issues of equity, diversity and inclusion as they relate to the cultural workforce and specific skills and training needs required to fill gaps in awareness, access and inclusion was vital for the success of this engagement. This section draws on the issues raised in roundtable consultations and survey responses related to the theme of diversity, equity and inclusion.

5.1 From Awareness to Action

The work of promoting equity and inclusion within the arts, culture and heritage sectors has been going on for decades. In the 1990s especially, people of colour and other minoritized groups began actively advocating to Canadian funding bodies and cultural institutions for improved access and representation. In recent years, the struggle for equity and inclusion has become particularly visible within mainstream discourse as a result of various developments, including the #MeToo movement, which has led to an increased focus on gender equity within the cultural workforce, the publication of the Truth and Reconciliation Commission's report and recommendations, Black Lives Matter, public debates around cultural appropriation, the introduction of the Ontarians with Disabilities Act (AODA) and growing awareness of systemic racism in Canadian institutions.

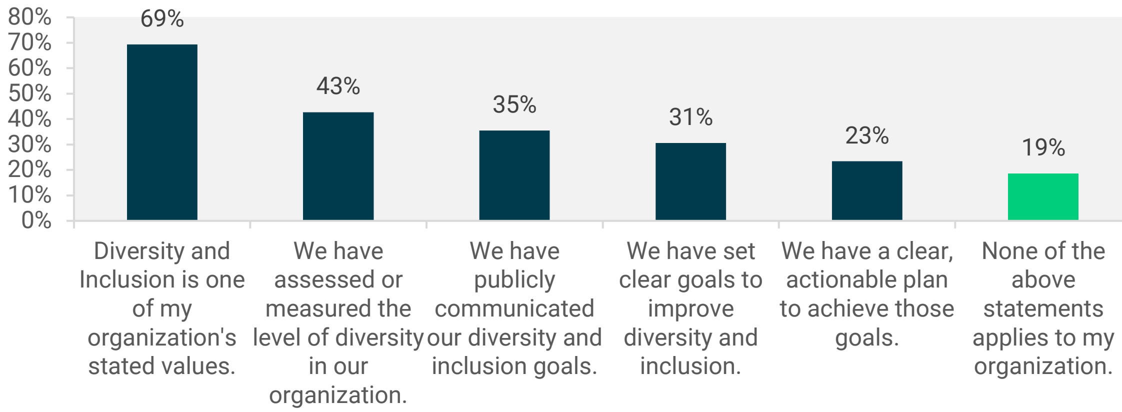
While we did not report directly on links between income and equity, this report does describe elements of the diversity within the profile of Ontario's culture sector, i.e.,

- The culture sector includes a higher share of newcomers to Canada, and a proportion of immigrants that is almost exactly in line with the overall average for Ontario. At the subsector level, newcomers and immigrants are underrepresented in all culture subsectors except the cultural industries;
- The share of members of visible minorities slightly lags the provincial average;
- Women are underrepresented in the workforce relative to the provincial average; and
- Aboriginal peoples are underrepresented in all cultural sub-sectors except for museums and heritage. The cultural industries have less than half the share of Aboriginal participation observed in the overall Ontario workforce.

The culture sector is roughly as diverse, based on the share of women, visible minorities and Aboriginal peoples, as the Ontario workforce, but unevenly so, with many areas of possible progress. Culture sector organizations demonstrated an increased *awareness* of need for diversity and inclusion but a lack of formal, accessible, cultural competency training available for the culture sector.

The following chart illustrates organizations' positioning on the issue of diversity and inclusion. The options provided present a continuum from diversity and inclusion being one of an organization's "stated values" at the left, down to "we have a clear, actionable plan to achieve those goals" at the right.

Figure 45: Organizational positioning on diversity and inclusion



Source: MakingItWork Survey, 2018 (n= 124)

Although 69% of organizations reported that diversity and inclusion is one of their stated values, only one in three (23% overall) has a clear, actionable plan to achieve explicit goals about diversity and inclusion. This lag between awareness and action was raised as a major challenge or stumbling block in regions across the province.

Culture sector stakeholders, organizations and individuals described needing guidance and resources, namely cultural competency training. Stakeholders questioned the appropriate steps for how to meaningfully and authentically partner, engage with, and support equity-seeking groups in the culture-sector workforce. Moving from objectives to implementation has proven to be a challenge for many organizations, who are asking themselves, "How can my organization become more diverse? What are the practical strategies to move beyond best intentions?" Training needs cited included:

- Anti-racist/anti-oppression training
- Sexual harassment resources
- Supports for diverse board recruitment
- Accessibility guidance and support

While stakeholders were largely united in the sense that there is an urgent need for support and training around issues of equity, and diverse representation at all levels of an organization, there was also a sense that resources, expertise, and training would all be useful but that "nobody can bear another AODA manual." In a sense, more important even than the expertise being geared towards the culture sector (though that would be ideal), is that it must be actionable and implementable for organizations and communities of various sizes and capacities.

As far as accessibility, stakeholders described a major shift that needs to take place, not only in the culture sector but across all sectors: that is, the realization that to be an accessible organization is "a lifetime of work." Many cultural organizations, as places of public gathering (such as music venues, galleries and studios) are held to high accessibility standards. Adhering to such standards requires time, planning and budgets devoted from the outset (i.e., a project's development stages) and will not be successfully implemented as afterthoughts.

5.2 Disrupting the Status Quo

Overall, there was an awareness and recognition that the culture sector in Ontario has problems to address with regards to racism, sexism, ableism and other forms of prejudice. No region was immune to issues whether from incidences of sexual harassment, a remarkable lack of diversity or simply not representing the fast-changing face of their communities. The sector seems to at least *recognize* the need for greater inclusion of different people with different experiences. More challenging, perhaps, is understanding or appreciating the fact that many cultural organizations and funding recipients still benefit from systems that support racist and inaccessible practices.

Roundtable attendees, particularly in larger urban centers, described how difficult it is to truly change existing power structures (e.g., funding and grants, patrons, boards and donors, advocacy etc.) in the culture sector. Participants explained the experience of operating in a class system in which certain skills and training opportunities (e.g., around developing networks, accessing fundraising and even communication) are held by the dominant class and not open to changing or adapting set ways of operating.

This area was another where the theme of disruption emerged, suggesting the need for new strategies and approaches to supporting diversity across the sector. As one participant posited, there is even the question as to whether more networking, more connections, and more job experience opportunities for equity-seeking groups may have a higher impact than more formal training opportunities for the rest of the sector; in other words, rather than supporting the rest of the sector to “catch-up”, instead simply, hire, invest in and support the employment of Indigenous people and equity-seeking groups.

6. Conclusions and Recommendations for the Sector

This report provides profile data and insights that are in demand by, and will benefit, many culture sector stakeholders, industry associations and organizations. MakingItWork's findings demonstrate the culture sector's vital need for current and credible labour market information and ongoing appraisals of the sector's sustainability. Individual artists and entrepreneurs as well as organizations of all sizes rely on external hubs such as WorkInCulture for resources and guidance when it comes to navigating human resource issues, career development strategies and accessible, relevant and affordable skills and training programming.

The report covers many broad sector-wide issues and challenges, and it makes recommendations to address these challenges. The following recommendations are geared towards the core areas that the sector's stakeholders can realistically explore and tackle. Acting on these recommendations would involve collaboration between sector partners – expanding on connections that are already in place and, in other cases, forging new ones. An overall recommendation is for WorkInCulture to share the key findings of this report widely so that other stakeholders can leverage the data for their own needs and to continue to develop and provide relevant labour market information that can be useful to communities.

6.1 Explore New HR Tools, Resources and Management Models Relevant to Ontario's Culture Sector

Context: Culture sector stakeholders are under pressure to accomplish more with fewer resources and are hungry for access to business and management expertise. This report finds that few arts organizations can devote resources to HR management or attend to work-life balance. Smaller organizations need more care and support. Burnout and instability threaten the health of the culture sector overall. Business, Leadership and Management skills are still in high demand from both culture sector organizations and workers. At the same time, there is a nexus of digital disruption and new skills, training and employment tools available for artists as well as arts organizations. With greater collaboration and training, organizations may be more likely to access the right resources for their needs.

It is recommended that the sector:

1. **Adapt, fine-tune and expand skills development and training resources based on the priority needs summarized in this report** e.g., business, leadership and management skills, marketing skills, governance and board management, digital technology training and diversity and inclusion training. Possible themes to consider include: disrupting the status quo as far as boards, partnerships, fundraising and advocacy. Assess skills resource offering to ensure full life-cycle of support from emerging, mid-career and advanced programming available. Explore the potential reach and rewards of online resources, while, where feasible, developing and delivering in-person training as per the sector's stated preference.
2. **Explore/assess feasibility and/or interest in developing shared culture-sector HR and business administration services** e.g., a People Library for sharing interns and other resources, shared digital and IT services (e.g., troubleshooting and other supports), ongoing income data sharing. Explore models in other jurisdictions such as Arts Council England's IT/digital champion approach and success stories such as ASANA project management software (see Appendix G).

6.2 Expand Supports for Diversity and Inclusion Planning in the Culture Sector

Context: MakingItWork provides a current snapshot of the demographic profile of Ontario's culture sector and identifies systemic challenges facing organizations as they endeavor to be more inclusive. MakingItWork provides more detail about the specific needs of the culture sector as far as training and support with becoming more inclusive, diverse and accessible workplaces. With better awareness of the challenges in place, the call for actionable, implementable strategies is in high demand.

It is recommended that the sector:

1. **Assess resources and capacity for developing more (and amplify existing) go-to hubs for diversity and inclusion for Ontario's culture sector.** WorkInCulture provides a range of support and expertise on the theme of Diversity and Inclusion for Ontario's culture sector but is resource-strained as far as being able to promote them widely or develop new programming in this space. The sector needs to both identify key areas for further investment and exploration, and promote the work and expertise of existing DI hubs.
2. **Based on the assessment of needs and available resources, invest in the development of new programming and partnerships and an intensive outreach effort to address the diversity and inclusion challenges raised in this report (i.e., for organizations to move from awareness of issues toward action and implementation)**. Such efforts could range from promoting existing resources from sector experts (e.g., ArtsBuild Ontario and Accessibility, WorkInCulture's own diversity toolkit) and making them available widely across the WorkInCulture network, to the development of new diversity and inclusion programs. WorkInCulture is currently, for example, exploring specific business skills training for newcomers to Canada interested in the culture sector in partnership with multiple municipal and provincial organizations.
3. **Support efforts towards transparency in the culture sector.** Continue to promote transparency across the sector e.g., by tracking representation across the sector building on the MakingItWork baseline and make results widely available.

6.3 Expand Support for Culture Sector Advocacy

Context: Throughout this engagement, participants have described a sector in need of disruption in communicating its value, managing boards and funders, strengthening transparency and ensuring the health and well-being of the sector (and more). In this context, there is a need for a strengthened capacity for advocacy within culture sector communities and its partners. This role could be accomplished both through the production of labour market information but also in the development of training and sharing expertise related to supporting organizations and stakeholders as they communicate the value and contribution of the arts and their practice to the economy and society.

It is recommended that the sector:

1. **Assess its capacity to further support efforts to communicate and assert the value and contribution of the sector to a range of audiences**. Build on existing efforts to measure and promote awareness of the sector as well as steps towards transparency

through continued labour marketing analysis and common and critical information-sharing and leadership

2. **Building on the findings, issues and challenges raised in this report to establish new and strategic training opportunities and partnerships** (e.g., municipalities and regions, industry associations, culture sector leaders, leaders and best practices from other sectors, jurisdictions etc.). Explore ways to forge greater connections within, for example, the design community and cultural industries, leveraging the survey results to understand where the gaps in awareness of programs and services exist.

6.4 Explore Capacity for Continuous Presence in Regional Culture Sectors

Context: While the focus on common and critical issues is sound, there is a potential need for more bespoke approaches to smaller and more isolated regions across the province. Each region has specific strengths and HR needs related to its own traditions, history, capacity, network, and priorities. Ontario's regional culture sectors would benefit from greater connections with one another, and with WorkInCulture. Such activities need not be entirely face-to-face but would be strengthened by having training which is tuned into the region's specific needs.

1. **Explore the feasibility of building on MakingItWork research and census data to map and evaluate regional culture sector attributes** (size, core issues, demographics, capacity, network access, strengths, language etc.) in order to fine-tune WorkInCulture's existing and potentially new offerings to the regions. Depending on nature of feasibility, explore the development of an evaluation tool for mapping culture hubs across Ontario to inform future investments in the regions/tailored to the regions
2. **Continue to invest in and develop online and digital tools adapted for regions, based on characteristics and attributes highlighted in this report**. Bearing in mind WorkInCulture's own limited funding and resources, explore creative ways to amplify, adapt and promote existing digital toolkits and resources – WorkInCulture's or others – to remote communities and partners. Explore, for example, new French-language partnerships and trusted French-language business skills resources to share and promote online. Depending on feasibility, partner with Franco-Ontarian individual or organization (e.g., TFO) to further WorkInCulture's objectives as far as supporting culture sector in French.

WorkInCulture's mission is to support the people who work in the cultural sector through life-long career development and entrepreneurial and business skills training. Some of the conclusions in this report extend beyond WorkInCulture's core mandate. That said, the organization is recognized as a hub for knowledge and capacity building in the culture sector in Ontario. Although it cannot address all the findings and challenges identified here, it has a vital role to play in many next steps supporting the sector's capacity and development.

Appendix A. Sample Survey Questions

Respondent Type

1. **In what capacity are you answering this survey?**
   To answer on behalf of an organization, you will need to be able to provide some detailed information about your company's HR operations. If you are a company owner, you should respond on behalf of your company.
   a. As an independent artist, freelancer, or creator
   b. As an individual who works for an arts organization, cultural industry company, arts council, trade association, heritage institution, or library
   c. On behalf of an arts organization, cultural industry company, arts council, trade association, heritage institution, or library
   d. On behalf of a government body (other than an arts council) or professional services company
2. **What is the name of the company or organization on behalf of which you are responding?**
3. **Which of the following sectors best describes your, or your organization's, primary area of work?**
   If you (or your organization) are active in several areas, select the one on which you spend the most time.
   a. Arts
   b. The Cultural Industries
   c. Heritage and Museums
   d. Library
   e. Design
   f. Archives
4. **Which of the following arts disciplines best describes your work or practice?**
5. **Which of the following cultural industries best describes your work or practice?**
6. **In which part(s) of the creative process do you or your organization participate?**
7. **In what district, county, or city (if your city is a county) are you located?**
8. **How old are you?**
9. **WorkInCulture is committed to supporting equitable access to its programming to all Ontarians, with particular emphasis on historically-marginalized groups. With which of the following such groups do you identify (if any)? This question is entirely optional. If you are not comfortable identifying yourself, you don't have to do so.**
   a. Indigenous (Status or non-status First Nations, Inuit, and Métis)
   b. Woman
   c. Person of Colour

d. Deaf and/or a person with a disability
e. LGBTQ+ Other

10. **What is the highest level of education you have received?**
11. **Which of the following best describes how you work?**
12. **How long have you**...
    a. Worked the arts/culture/heritage sector?
    b. Been in your current career?
    c. Been in your current role/position?
13. **Is your organization a not-for-profit organization?**
14. **Do you own (some or all of) the company for which you are responding?**
15. **In what year was your organization founded/incorporated?**

__Income/Salary__

1. **What is your organization's approximate annual operating budget?**
   Please select the most appropriate range from the following drop-down menu.
2. **Please select the range that best describes your total income (from all sources) in 2017?**
3. **How did your income in 2017 compare to your income in 2015?**
4. **Approximately what portion (%) of your income in 2017 came from your work in [response]?**
5. **Which of the following applies to your employment outside your work in [response]?**
6. **How many hours per week do you spend working on your [response] work?**
7. **Please include both paid an unpaid time (e.g., rehearsals, studio time, practice, etc.) hours per week**
8. **Are you a member of a union or guild?**
9. **What benefits do you have access to? And which do you need/want?**
10. **Which of the following benefits do you typically offer your employees?**
11. **How many people work in your organization?**
12. **How many (if any) interns and co-op students does your organization hire in a typical year?**

__Issues & HR__

1. **How satisfied are you with...**
   a. your career progress to date?
   b. your career potential for growth, advancement and/or upward mobility?
   c. your access to training and professional development?

2. **Of the following potential barriers, which have most affected your career to date?**
3. **How do you handle human resources (HR) tasks at your organization?**
4. **Which of the following types of information are (or would be) useful in the operation of your organization?**
5. **In the past two years, what sources have you accessed to stay on top of management best practices and/or labour market trends?**
6. **How do your employees typically access training and/or acquire new skills?**

Skills & Training

1. **Approximately how much did you spend on employee training in 2017?**
2. **Which (if any) of the following issues present challenges for your organization?**
3. **Which (if any) of the following skills are most critical for your organization?**
4. **Which of the following skills are critical in the development of your career?**
5. **How do you typically learn new skills?**
6. **Which is your preferred method of learning new skills?**
7. **What (if any) barriers exist to your on-going training and professional development?**

Appendix B. Detailed Demographic Information

This appendix presents detailed demographic information that was not included in the body of the report. Note that the total number of workers stated in each table may not precisely match the totals presented in the body of the report, due to data suppression, data cleaning, and rounding practices employed by Statistics Canada.

Table 7: Worker headcount by occupational function

	Occupational Function				
	Creative	Technical	Managerial	Other	Total
Arts	**46,425**	**1,435**	**6,270**	**1,305**	**55,435**
Visual Arts & Crafts	17,090	105	3,330	1,240	**21,765**
Dance, Music, Theatre	21,435	1,330	2,940	65	**25,770**
Literary Arts	7,900	0	0	0	**7,900**
The Cultural Industries	**113,350**	**21,955**	**45,175**	**11,315**	**191,795**
Digital Media	47,505	665	18,635	0	**66,805**
Design and Advertising	37,085	9,830	17,250	290	**64,455**
Film & Television	20,135	10,290	7,440	455	**38,320**
Book and Magazine Pub.	6,800	535	1,450	10,550	**19,335**
Music Recording and Pub.	1,825	635	400	20	**2,880**
Libraries	**3,820**	**9,195**	**1,560**	**0**	**14,575**
Museums and Heritage	**1,120**	**2,370**	**0**	**0**	**3,490**
Museums	730	1,645	0	0	**2,375**
Archives	390	725	0	0	**1,115**
Empl. across subsectors	**3,715**	**840**	**4,105**	**265**	**8,925**
Total	**168,430**	**35,795**	**57,110**	**12,885**	**274,220**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Table 8: Worker headcount by population of urban centre

	Population of Urban Area			
	>500K	100K-500K	<100K	Total
Arts	**39,840**	**8,675**	**6,905**	**55,420**
Visual Arts & Crafts	14,750	3,515	3,420	**21,685**
Dance, Music, Theatre	18,855	4,220	2,740	**25,815**
Literary Arts	6,235	940	745	**7,920**
The Cultural Industries	**156,445**	**22,740**	**12,570**	**191,755**
Digital Media	56,455	7,325	3,040	**66,820**
Design and Advertising	51,265	8,190	4,905	**64,360**
Film & Television	32,890	3,635	1,885	**38,410**
Book and Magazine Pub.	13,490	3,335	2,525	**19,350**
Music Recording and Pub.	2,345	255	215	**2,815**
Libraries	**9,190**	**2,895**	**2,480**	**14,565**
Museums and Heritage	**2,065**	**730**	**660**	**3,455**
Museums	1,260	560	535	**2,355**
Archives	805	170	125	**1,100**
Empl. across subsectors	**7,290**	**1,095**	**545**	**8,930**
Total	**214,830**	**36,135**	**23,160**	**274,125**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Table 9: Worker headcount by age

	Age						
	15-24	25-34	35-44	45-54	55-64	65+	Total
Arts	**6,090**	**12,410**	**11,165**	**10,595**	**9,965**	**5,270**	**55,495**
Visual Arts & Crafts	1,645	4,510	4,620	4,470	4,355	2,130	**21,730**
Dance, Music, Theatre	4,190	6,720	4,960	4,340	3,880	1,785	**25,875**
Literary Arts	255	1,180	1,585	1,785	1,730	1,355	**7,890**
The Cultural Industries	**15,140**	**57,450**	**49,250**	**40,990**	**23,355**	**5,535**	**191,720**
Digital Media	5,705	21,050	19,425	13,820	5,800	950	**66,750**
Design and Advertising	5,040	20,145	15,410	13,070	8,245	2,515	**64,425**
Film & Television	3,240	12,060	9,775	7,840	4,555	830	**38,300**
Book and Magazine Pub.	860	3,380	4,030	5,680	4,355	1,030	**19,335**
Music Recording and Pub.	295	815	610	580	400	210	**2,910**
Libraries	**2,130**	**2,250**	**2,280**	**3,245**	**3,940**	**730**	**14,575**
Museums and Heritage	**630**	**885**	**670**	**640**	**505**	**150**	**3,480**
Museums	595	625	405	355	290	110	**2,380**
Archives	35	260	265	285	215	40	**1,100**
Empl. across subsectors	**895**	**2,690**	**1,900**	**1,785**	**1,225**	**405**	**8,900**
Total	**24,885**	**75,685**	**65,265**	**57,255**	**38,990**	**12,090**	**274,170**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Table 10: Worker headcount by sex

	Gender		
	Female	Male	Total
Arts	**30,400**	**25,080**	**55,480**
Visual Arts & Crafts	11,615	10,135	**21,750**
Dance, Music, Theatre	14,110	11,725	**25,835**
Literary Arts	4,675	3,220	**7,895**
The Cultural Industries	**69,815**	**122,025**	**191,840**
Digital Media	17,095	49,770	**66,865**
Design and Advertising	31,430	33,010	**64,440**
Film & Television	13,320	25,050	**38,370**
Book and Magazine Pub.	7,210	12,125	**19,335**
Music Recording and Pub.	760	2,070	**2,830**
Libraries	**12,115**	**2,490**	**14,605**
Museums and Heritage	**2,230**	**1,250**	**3,480**
Museums	1,495	865	**2,360**
Archives	735	385	**1,120**
Empl. across subsectors	**5,210**	**3,725**	**8,935**
Total	**119,770**	**154,570**	**274,340**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Table 11: Worker headcount by highest level of educational attainment

	Highest Level of Educational Attainment				
	High school or less	Post-secondary, below bachelor	Post-secondary, bachelor's degree	Post-secondary, graduate degree	Total
Arts	**15,160**	**14,430**	**17,540**	**8,205**	**55,335**
Visual Arts & Crafts	6,235	7,445	6,000	2,020	**21,700**
Dance, Music, Theatre	7,970	5,925	8,265	3,580	**25,740**
Literary Arts	955	1,060	3,275	2,605	**7,895**
The Cultural Industries	**30,040**	**56,770**	**74,130**	**30,810**	**191,750**
Digital Media	7,475	13,735	30,625	15,005	**66,840**
Design and Advertising	7,455	22,310	24,520	10,075	**64,360**
Film & Television	6,645	14,030	13,925	3,780	**38,380**
Book and Magazine Pub.	7,685	5,800	4,210	1,590	**19,285**
Music Recording and Pub.	780	895	850	360	**2,885**
Libraries	**3,480**	**3,340**	**3,450**	**4,365**	**14,635**
Museums and Heritage	**650**	**685**	**1,155**	**960**	**3,450**
Museums	450	445	865	645	**2,405**
Archives	200	240	290	315	**1,045**
Empl. across subsectors	**1,790**	**2,375**	**3,465**	**1,410**	**9,040**
Total	**51,120**	**77,600**	**99,740**	**45,750**	**274,210**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Table 12: Worker headcount by newcomers and immigrant status

	Newcomers			
	Newcomers (immigrated since 2012)	Immigrants (from 2011 or earlier)	Non-immigrants	Total
Arts	**1,770**	**14,035**	**39,715**	**55,520**
Visual Arts & Crafts	705	6,090	15,050	**21,845**
Dance, Music, Theatre	770	5,115	19,865	**25,750**
Literary Arts	295	2,830	4,800	**7,925**
The Cultural Industries	**12,465**	**55,510**	**123,810**	**191,785**
Digital Media	7,315	23,805	35,730	**66,850**
Design and Advertising	3,090	17,305	43,975	**64,370**
Film & Television	1,380	7,830	29,080	**38,290**
Book and Magazine Pub.	630	6,100	12,600	**19,330**
Music Recording and Pub.	50	470	2,425	**2,945**
Libraries	**170**	**3,005**	**11,415**	**14,590**
Museums and Heritage	**100**	**470**	**2,965**	**3,535**
Museums	70	265	2,050	**2,385**
Archives	30	205	915	**1,150**
Empl. across subsectors	**285**	**2,075**	**6,560**	**8,920**
Total	**14,790**	**75,095**	**184,465**	**274,350**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Table 13: Worker headcount by visible minority status

	Visible Minorities		
	Visible minorities	Non-visible minorities	Total
Arts	**11,165**	**44,275**	**55,440**
Visual Arts & Crafts	4,575	17,185	**21,760**
Dance, Music, Theatre	4,715	21,085	**25,800**
Literary Arts	1,875	6,005	**7,880**
The Cultural Industries	**55,750**	**135,935**	**191,685**
Digital Media	25,295	41,455	**66,750**
Design and Advertising	16,110	48,260	**64,370**
Film & Television	8,380	29,955	**38,335**
Book and Magazine Pub.	5,480	13,840	**19,320**
Music Recording and Pub.	485	2,425	**2,910**
Libraries	**2,535**	**11,970**	**14,505**
Museums and Heritage	**450**	**3,105**	**3,555**
Museums	220	2,145	**2,365**
Archives	230	960	**1,190**
Empl. across subsectors	**2,120**	**6,775**	**8,895**
Total	**72,020**	**202,060**	**274,080**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Table 14: Worker headcount by Aboriginal identity(ies)

	Aboriginal Identity(ies)		
	Aboriginal identity(ies)	Non-Aboriginal identity	Total
Arts	**1,005**	**54,480**	**55,485**
Visual Arts & Crafts	425	21,280	**21,705**
Dance, Music, Theatre	450	25,425	**25,875**
Literary Arts	130	7,775	**7,905**
The Cultural Industries	**2,085**	**189,625**	**191,710**
Digital Media	530	66,240	**66,770**
Design and Advertising	640	63,645	**64,285**
Film & Television	510	37,800	**38,310**
Book and Magazine Pub.	345	19,040	**19,385**
Music Recording and Pub.	60	2,900	**2,960**
Libraries	**300**	**14,280**	**14,580**
Museums and Heritage	**135**	**3,380**	**3,515**
Museums	60	2,310	**2,370**
Archives	75	1,070	**1,145**
Empl. across subsectors	**135**	**8,770**	**8,905**
Total	**3,660**	**270,535**	**274,195**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Table 15: Worker headcount by language(s) most often spoken at home

	Language(s) Spoken at Home				
	English	English and French	French	Neither English nor French	Total
Arts	**49,220**	**265**	**1,030**	**5,270**	**55,785**
Visual Arts & Crafts	19,400	50	255	2,295	**22,000**
Dance, Music, Theatre	23,515	105	300	1,940	**25,860**
Literary Arts	6,305	110	475	1,035	**7,925**
The Cultural Industries	**163,705**	**710**	**2,235**	**25,025**	**191,675**
Digital Media	52,475	305	825	13,130	**66,735**
Design and Advertising	56,630	245	615	6,885	**64,375**
Film & Television	35,200	130	550	2,470	**38,350**
Book and Magazine Pub.	16,605	30	215	2,455	**19,305**
Music Recording and Pub.	2,795	0	30	85	**2,910**
Libraries	**13,170**	**65**	**410**	**945**	**14,590**
Museums and Heritage	**3,265**	**10**	**135**	**110**	**3,520**
Museums	2,225	10	65	60	**2,360**
Archives	1,040	0	70	50	**1,160**
Empl. across subsectors	**8,030**	**55**	**165**	**730**	**8,980**
Total	**237,390**	**1,105**	**3,975**	**32,080**	**274,550**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Table 16: Worker headcount by work activity and class of worker

	Work Activity and Class of Worker						
	Employee			Self-employed			Total
	Full time, full year	Full time, part year	Part time	Full time, full year	Full time, part year	Part time	
Arts	**8,750**	**5,315**	**9,340**	**10,000**	**5,805**	**14,490**	**53,700**
Visual Arts & Crafts	4,925	1,940	2,120	4,845	2,380	4,725	**20,935**
Dance, Music, Theatre	3,190	2,950	6,380	3,160	2,510	6,975	**25,165**
Literary Arts	635	425	840	1,995	915	2,790	**7,600**
The Cultural Industries	**99,415**	**35,380**	**11,505**	**20,950**	**9,455**	**11,135**	**187,840**
Digital Media	38,000	12,260	3,370	6,375	2,615	2,495	**65,115**
Design and Advertising	30,415	10,715	3,305	9,235	3,635	5,560	**62,865**
Film & Television	18,105	8,655	3,230	3,405	2,495	1,970	**37,860**
Book and Magazine Pub.	12,140	3,465	1,340	1,230	320	590	**19,085**
Music Recording and Pub.	755	285	260	705	390	520	**2,915**
Libraries	**6,155**	**2,315**	**5,800**	**15**	**0**	**20**	**14,305**
Museums and Heritage	**1,790**	**735**	**820**	**20**	**10**	**10**	**3,385**
Museums	1,000	570	720	10	10	10	**2,320**
Archives	790	165	100	10	0	0	**1,065**
Empl. across subsectors	**3,440**	**1,250**	**975**	**1,350**	**625**	**1,015**	**8,655**
Total	**119,550**	**44,995**	**28,440**	**32,335**	**15,895**	**26,670**	**267,885**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Appendix C. Detailed Income Information

This section provides more detailed information about average incomes (from all sources) by occupational function and size of urban centre.

The following table provides a top-line summary of the data, which is followed by two tables that provide additional breakouts by size of urban centre.

Table 17: Worker headcount and average income (from all sources) by occupational function

	Worker Headcount, by Function			Average Income, by Function		
	Creative Workers	Technical, Managerial, and Other	Total	Creative Workers	Technical, Managerial, and Other	Overall
Arts	**45,200**	**8,995**	**54,195**	**$30,000**	**$65,000**	**$35,900**
Visual Arts & Crafts	16,685	4,705	**21,390**	$29,200	$72,900	**$38,800**
Dance, Music, Theatre	20,775	4,290	**25,065**	$26,500	$56,400	**$31,600**
Literary Arts	7,740	0	**7,740**	$41,300	n/a	**$41,300**
The Cultural Industries	**112,345**	**78,035**	**190,380**	**$61,200**	**$73,900**	**$66,400**
Digital Media	47,160	19,145	**66,305**	$68,500	$99,800	**$77,500**
Design and Advertising	36,615	27,175	**63,790**	$55,000	$63,600	**$58,700**
Film & Television	19,955	18,170	**38,125**	$60,900	$77,200	**$68,700**
Book and Magazine Pub.	6,790	12,510	**19,300**	$51,600	$53,400	**$52,800**
Music Recording and Pub.	1,825	1,035	**2,860**	$38,300	$50,600	**$42,800**
Libraries	**3,820**	**10,690**	**14,510**	**$68,500**	**$41,600**	**$48,700**
Museums and Heritage	**1,130**	**2,355**	**3,485**	**$51,800**	**$37,700**	**$42,300**
Museums	715	1,635	**2,350**	$57,300	$33,300	**$40,600**
Archives	415	720	**1,135**	$42,300	$47,800	**$45,800**
Empl. across subsectors	**3,665**	**5,165**	**8,830**	**$43,700**	**$50,000**	**$47,400**
Total/Overall	**166,160**	**105,240**	**271,400**	**$52,500**	**$67,800**	**$58,400**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.
* **Literary Arts** does not include any technical, managerial, or other roles because these roles are included in the Book and Magazine Publishing specialization of the Cultural Industries.

Table 18: Worker headcount by size of urban centre and occupational function

	Workforce Headcount, by Size of Urban Centre and Occupational Function									
	<100K			100K-500K			>500K			Ontario
	Creative Workers	Tech, Mgt, & Other	<100K Overall	Creative Workers	Tech, Mgt, & Other	100K-500K Overall	Creative Workers	Tech, Mgt, & Other	>500K Overall	Ontario Overall
Arts	**5,730**	**1,020**	**6,750**	**7,160**	**1,300**	**8,460**	**32,250**	**6,585**	**38,835**	**54,195**
Visual Arts & Crafts	2,800	550	**3,350**	2,780	675	**3,455**	11,040	3,380	**14,420**	**21,390**
Dance, Music, Theatre	2,225	470	**2,695**	3,450	625	**4,075**	15,095	3,205	**18,300**	**25,065**
Literary Arts	705	0	**705**	930	0	**930**	6,115	0	**6,115**	**7,740**
The Cultural Industries	**7,070**	**5,375**	**12,445**	**12,585**	**9,915**	**22,500**	**92,705**	**62,520**	**155,225**	**190,380**
Digital Media	2,045	955	**3,000**	4,915	2,360	**7,275**	40,200	15,825	**56,025**	**66,305**
Design and Advertising	2,990	1,885	**4,875**	4,655	3,460	**8,115**	28,985	21,800	**50,785**	**63,790**
Film & Television	1,025	780	**1,805**	1,755	1,785	**3,540**	17,190	15,505	**32,695**	**38,125**
Book and Magazine Pub.	820	1,720	**2,540**	1,065	2,235	**3,300**	4,880	8,520	**13,400**	**19,300**
Music Recording and Pub.	190	35	**225**	195	75	**270**	1,450	870	**2,320**	**2,860**
Libraries	**535**	**1,920**	**2,455**	**680**	**2,230**	**2,910**	**2,615**	**6,540**	**9,155**	**14,510**
Museums and Heritage	**295**	**350**	**645**	**165**	**580**	**745**	**630**	**1,440**	**2,070**	**3,485**
Museums	245	275	**520**	110	450	**560**	350	910	**1,260**	**2,350**
Archives	50	75	**125**	55	130	**185**	280	530	**810**	**1,135**
Empl. across subsectors	**220**	**345**	**565**	**375**	**705**	**1,080**	**3,015**	**4,130**	**7,145**	**8,830**
Total/Overall	**13,850**	**9,010**	**22,860**	**20,965**	**14,730**	**35,695**	**131,215**	**81,215**	**212,430**	**271,400**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Note that the number of workers may not sum across different sizes of population centres due to rounding and census data suppression.

Table 19: Average annual income ($ from all sources) by size of urban centre and occupational function

	Average Annual Income ($), by Size of Urban Centre and Occupational Function									
	<100K			100K-500K			>500K			Ontario
	Creative Workers	Tech, Mgt, & Other	<100K Overall	Creative Workers	Tech, Mgt, & Other	100K-500K Overall	Creative Workers	Tech, Mgt, & Other	>500K Overall	Ontario Overall
Arts	**25,500**	**25,100**	**25,400**	**22,200**	**20,900**	**22,000**	**30,000**	**67,200**	**36,300**	**35,900**
Visual Arts & Crafts	22,600	13,500	**21,100**	19,500	22,400	**20,100**	29,600	76,100	**40,500**	**38,800**
Dance, Music, Theatre	23,800	38,600	**26,300**	20,700	19,300	**20,400**	27,400	57,800	**32,800**	**31,600**
Literary Arts	42,400	n/a	**42,400**	36,000	n/a	**36,000**	37,100	n/a	**37,100**	**41,300**
The Cultural Industries	**43,000**	**46,300**	**44,400**	**49,100**	**57,100**	**52,600**	**63,300**	**76,400**	**68,600**	**66,400**
Digital Media	52,800	69,200	**58,000**	54,400	84,000	**64,000**	70,500	102,600	**79,600**	**77,500**
Design and Advertising	43,400	41,400	**42,600**	47,400	51,000	**48,900**	56,300	64,700	**59,900**	**58,700**
Film & Television	28,700	36,300	**32,000**	45,600	48,600	**47,100**	62,700	80,000	**70,900**	**68,700**
Book and Magazine Pub.	41,600	44,500	**43,600**	44,200	46,700	**45,900**	54,700	53,300	**53,800**	**52,800**
Music Recording and Pub.	13,700	n/a	**11,600**	11,700	5,800	**10,100**	37,000	55,500	**43,900**	**42,800**
Libraries	**51,600**	**37,500**	**40,600**	**71,900**	**37,600**	**45,600**	**70,800**	**43,700**	**51,400**	**48,700**
Museums and Heritage	**42,800**	**29,900**	**35,800**	**31,900**	**28,500**	**29,300**	**56,100**	**40,600**	**45,400**	**42,300**
Museums	41,300	34,100	**37,500**	47,800	28,000	**31,900**	69,000	35,600	**44,900**	**40,600**
Archives	49,900	14,400	**28,600**	n/a	30,400	**21,400**	40,000	49,300	**46,100**	**45,800**
Empl. across subsectors	**14,900**	**11,200**	**12,600**	**29,100**	**34,600**	**32,700**	**45,100**	**51,600**	**48,800**	**47,400**
Total/Overall	**35,600**	**40,000**	**37,400**	**40,100**	**48,800**	**43,700**	**54,800**	**71,100**	**61,000**	**58,400**

Source: Statistics Canada, 2016 Census of Population, Custom tabulation.

Note that the average incomes presented in this table correspond to the worker headcounts enumerated in the table above. Data presented at the specialization level should be interpreted with caution.

* **nm** (or 'not meaningful') indicates that income data was suppressed due to a small sample.

Appendix D. Census Analysis Methodology

Section 1.3.5 describes the types of workers who are represented in the survey sample. Similarly, Section 1.3.4 describes the analytical techniques used to identify, isolate and classify workers in the culture sector based on a custom tabulation of data from **Statistics Canada's *2016 Census of the Population***. This section performs a parallel function by describing the types of workers that are represented in findings drawn from census data.

More precisely, in order to extract information about workers in the culture sector, this analysis relies on statistical classifications of **occupations** (National Occupational Classifications, or NOCs) and **industries** (North American Industry Classification System, or NAICS). As such, the data and estimates drawn from census data are limited to workers whose primary occupation and industry reported in the census matches a set of definitions informed by the **Canadian Framework for Culture Statistics (CFCS)**.

This appendix provides an overview of the specific definitions used in this analysis, limitations of the analytical methodology employed, and how these definitions have evolved from Statistics Canada's seminal work on the CFCS.

Methodological Overview

In broad terms, the census data referenced in this report was broken out for the employed workforce based on their primary source of employment, identified by occupational and industrial classification systems. This overview briefly describes how census data was mapped to specializations (the lowest level of the taxonomy used to define the culture sector, as illustrated in section 1.3.3) and then aggregated into the subsectors which are the focus of analysis in this report.

The following diagram provides a simplified illustration of census data broken out by industry and occupation, which will be used to explain the mapping process. The data in each cell in the table represents the total number of workers in each occupation and industry, although a similar process was used to determine demographic characteristics and average incomes for each segment of the workforce.

Figure 46: Illustrative diagram of census data broken out by occupation and industry

		Industries							
		Clothing manufacturing	Sound recording industries	Book stores and news dealers	Software publishers	Architectural services	Educational services	Performing arts companies	etc.
Occupations	Senior managers	10	80	40	90	30	50	20	-
	Drafting technicians	0	0	0	20	40	10	0	-
	Architects	0	0	0	10	80	20	0	-
	Musicians	0	90	0	20	0	40	80	-
	Librarians	0	20	50	10	10	80	30	-
	etc.	-	-	-	-	-	-	-	-

Based on definitions laid out in the CFCS, Nordicity first identified industries and occupations that could be wholly associated with a particular specialization (which, to the extent possible, were designed to correspond to subdomains in the CFCS). In order to illustrate this process, this overview will consider how one might identify the workforce in a few example specializations. Occupations and industries that are wholly included in a specialization are referred to as **primary specializations**[14] in this analysis. For example, architecture is the primary specialization associated with the occupation *Architects* as well as the industry *Architectural services*, as illustrated in the diagram below.

Figure 47: Illustrative diagram of census data: mapping workers to a primary specialization

		Industries							
		Clothing manufacturing	Sound recording industries	Book stores and news dealers	Software publishers	Architectural services	Educational services	Performing arts companies	etc.
Occupations	Senior managers	10	80	40	90	30	50	20	-
	Drafting technicians	0	0	0	20	40	10	0	-
	Architects	0	0	0	10	80	20	0	-
	Musicians	0	90	0	20	0	40	80	-
	Librarians	0	20	50	10	10	80	30	-
	etc.	-	-	-	-	-	-	-	-

At this point, the analysis has located many of the people that contribute to the value chain in the architecture specialization. The analysis above includes 30 *Senior managers*, 40 *Drafting technicians*, and *10 Librarians* that work in *Architectural services* firms. Moreover, the *Architects* row above allows the analysis to capture 10 *Architects* employed at *Software publishers* (who are assumed to be employed in a capacity supporting the development of architectural software), and private training institutions (*Educational services*) which employ 20 architects.

While this definition likely provides a good approximation of the workforce involved in *Architecture*, the following table illustrates a few additional considerations to make. *Librarians* are a profession that shows up in a lot of different industries, and does not really comprise a standalone value chain, but rather, a creative and organizational function serving both end users in the public as well as other industries. In order to generate a clear boundary for the *Libraries* specialization (green), the occupation is given priority over industry in order to include all *Librarians* within the *Libraries* specialization.

[14] See **Appendices E and F** for a detailed listing of **primary specializations** associated with specific occupational and industrial codes underlying this analysis.

Figure 48: Illustrative diagram of census data: mapping workers to a primary specialization with conflicting nodes

Occupations	Industries:	Clothing manufacturing	Sound recording industries	Book stores and news dealers	Software publishers	Architectural services	Educational services	Performing arts companies	etc.
	Senior managers	10	80	40	90	30	50	20	-
	Drafting technicians	0	0	0	20	40	10	0	-
	Architects	0	0	0	10	80	20	0	-
	Musicians	0	90	0	20	0	40	80	-
	Librarians	0	20	50	10	10	80	30	-
	etc.	-	-	-	-	-	-	-	-

As a result of this process, the analysis now yields 10 fewer workers in the blue area representing *Architecture*, but these 10 workers are now included in the green area representing *Libraries*, the definition for which focuses on a specific type of cultural worker.

The next angle to consider is that two specializations are encapsulated by the music industry, as illustrated in the following figure. The definitions used in this analysis require an additional level of nuance because *Musicians* may work in either the *Cultural Industries* or the *Arts*, depending on the industry in which they work. In the *Cultural Industries*, *Musicians* may be employed in *Sound Recording & Publishing* (e.g., recording music for a radio commercial), or working with *Software developers* (e.g., in the development of sound editing or music notation software). By contrast, *Musicians* in the *Arts* may work as live performers (e.g., for a performing arts company), or in private teaching studios (i.e., in educational services).

Figure 49: Illustrative diagram of census data: mapping workers to a partial specialization

Occupations	Industries:	Clothing manufacturing	Sound recording industries	Book stores and news dealers	Software publishers	Architectural services	Educational services	Performing arts companies	etc.
	Senior managers	10	80	40	90	30	50	20	-
	Drafting technicians	0	0	0	20	40	10	0	-
	Architects	0	0	0	10	80	20	0	-
	Musicians	0	90	0	20	0	40	80	-
	Librarians	0	20	50	10	10	80	30	-
	etc.	-	-	-	-	-	-	-	-

To account for each of the possibilities outlined above, definitions were developed in a way that would permit this type of distinction – in addition to assigning **primary specializations** along NAICS-based industry verticals for *Music Recording & Publishing* (purple) and *Dance, Music, Theatre* (yellow), musicians were assigned **partial specializations** to identify segments of musicians that should be assigned to a different specialization depending on the industry in which they are employed.

Although the preceding example was simplified to provide a concise overview of the methodology, the final figure in the sequence provides a model for understanding the set of workers that have been included in the census data presented in this report. In contrast to the shaded regions in the figure, the unshaded cells are not considered to be part of the culture sector. **Appendices E and F** outline in great detail the occupational and industrial classifications that have been used to identify the workers that have been presented in this analysis. As the following breakout box elaborates, some judgement was required to determine the extent to which workers of a certain occupation in any given industry were, in fact, employed in specific specializations or even the Cultural Sector as a whole.

"Is [specific occupation] included in the culture sector?"

A recurring question about this analysis is whether it includes a particular specialized occupation. The following four step process can be used to answer these questions, and we have illustrated these steps using the example of law librarians.

1. Look up the occupation at Statistics Canada's NOC 2016 reference documentation and find the unit group (i.e., four-digit) code that best matches the desired occupation and review the definition.

   For example, law librarians are listed among the examples of professions for unit group 5111 ("Librarians").

2. Locate the unit group in the list in **Appendix E**. The purpose of this step is first to ensure that the occupation has been included in the analysis at all, and second, to note any primary or partial specializations with which the occupation is associated.

   Unit group 5111 is included in Appendix E, and it is associated with the primary specialization, "Library."

3. Refer to the rules at the beginning of **Appendix E** to determine which of the industries in **Appendix F** match with the specialized occupation's unit group.

   In the case of unit group 5111's primary specialization, Appendix E states that "NOC codes associated with a primary specialization draw workers from all industries listed in the following appendix into the specified specialization. When there is a conflict between the primary specialization of the occupation and that of a given industry, the primary specialization of the industry takes precedence." As such, all industries listed in Appendix F, except those with a different primary specialization, are included.

4. Use Statistics Canada's 2012 NAICS reference documentation to determine whether the specialized occupation is likely to be present in each industry.

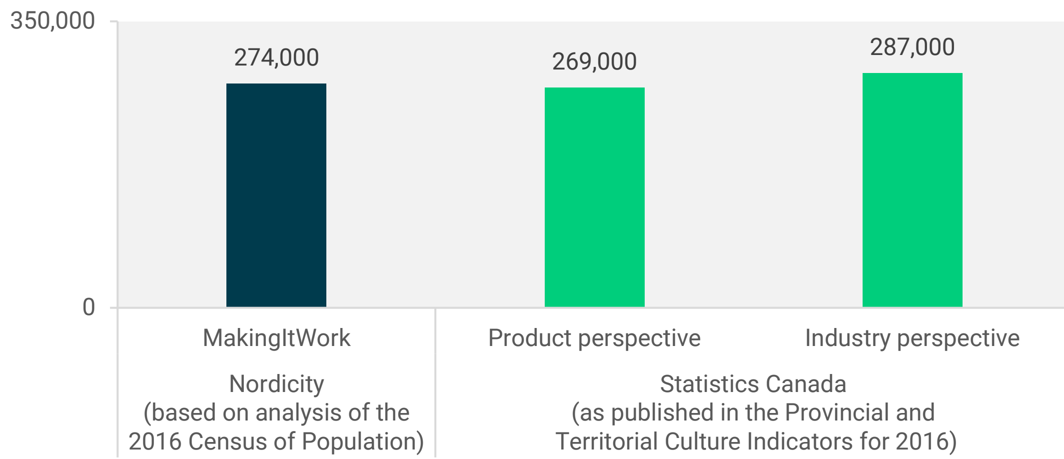
   Upon analysis, we find that NAICS 5411 ("Legal services") is not included, however law librarians may be employed in 5191 ("Other information services") working in internet publishers that serve law firms. As such, there are likely to be some law librarians included in this analysis; however, it can be reasonably assumed that most law librarians are employed in legal services and are therefore not included.

As a final note, one of the most significant impediments to researching the culture sector (and one of the major catalysts for the development of the Canadian Framework for Culture Statistics in the first place) is that traditional industrial classification systems do not readily capture the full contribution of creative and cultural workers in the wider economy. Approaches such as the one described in this section fundamentally seek to overcome this impediment using a defensible and replicable approach. Although any such synthesis of statistical data is invariably subject to a variety of limitations, the research conducted for this report provides a reasonable approach to identifying and extracting information about the culture sector from highly accurate census data.

Comparing Nordicity's MakingItWork Census Data Analysis with the Results of Statistics Canada's Provincial and Territorial Culture Indicators

A reader well-versed in culture statistics might wonder how the approach described in this section compares to Statistics Canada's seminal economic analysis of the culture industries in the **Provincial and Territorial Culture Indicators (PTCI)**. As illustrated in the following chart, the top-line jobs estimates reported in the PTCI are quite similar to the workforce size yielded by this study.

Figure 50: Comparison of MakingItWork and PTCI estimates of workers/jobs in Ontario's Culture Sector



Sources: Nordicity analysis on Statistics Canada, 2016 Census of Population, Custom tabulation, Statistics Canada Tables 36-10-0452-01 and 36-10-0453-01. *Note: all sources rounded to the nearest thousand.*

Although the overall consistency between employment figures reported in each source may suggest a similarity in methodologies, there are, in fact, significant differences in how employment figures are reached through each approach. At the highest level, both sources rely primarily on definitions set out in the CFCS; however, that point is also where the similarities end. The following table provides an overview of key methodological features that help to clarify how these two approaches differ.

Figure 51: Methodological comparison of MakingItWork and Provincial and Territorial Culture Indicators

Feature of methodology	Nordicity, MakingItWork	Statistics Canada, PTCI
Source of definitions	The Canadian Framework for Culture Statistics (CFCS)	
Definitions used	Occupational (NOC) and industrial (NAICS) classifications	Product classifications (NAPCS)
Reference data	Custom tabulation of Statistics Canada's 2016 Census of Population	Provincial and Territorial Economic Accounts (Supply and Use and Input-Output Tables), industry surveys

Feature of methodology	Nordicity, MakingItWork	Statistics Canada, PTCI
Measurement of workers/jobs	Workers whose primary job matches the occupational and industrial definitions specified in **Appendices E and F**, using the approach described in this section.	**Labour applied to cultural products** as they move through the Canadian economy (based on Supply and Use and Input-Output Tables)
Research results	**Demographic, employment and income characteristics** (size of urban centre, sex, age, education, immigration status, language, visible minorities status, Aboriginal identification, occupational function, mode of employment, and income)	**Economic measurements** (GDP, output and jobs)
Description of the culture sector (or industries), ***as represented in each analytical approach***	The approach used in this report focuses on **the people who primarily work in the culture sector**, as defined in the CFCS. To that end, Nordicity applied definitions from the CFCS that are compatible with census data in order to quantify and learn about the individual workers that are employed in the culture sector. This approach culminated in a detailed demographic and occupational profile of the Ontario culture sector.	The approach employed in the PTCI focuses on **the culture industries' economic contribution to provincial economies**, as defined in the CFCS. To that end, Statistics Canada applied definitions from the CFCS that are compatible with economic accounts. This methodology culminated in provincial estimates of the amount of economic activity associated with the circulation of culture products within the Canadian economy.

MakingItWork and the Provincial and Territorial Culture Indicators: Different definitions, measurements and sources

As the preceding table suggests, each of these methodological approaches was developed to achieve very different research objectives. Although the similarity between the top-line results provides a degree of confirmation that both approaches are likely to have a significant overlap in who and what they include in the culture sector/industries, it would be incorrect to assume equivalency between the culture sector (or industries) as represented by Nordicity's and Statistics Canada's respective analyses. Each source represents a wholly separate line of research.

One additional difference that is important to note is that PTCI derives employment figures from economic accounts, which measure labour in terms of full-time equivalents. These units are used to quantify the amount of productive labour in the economy, however they do not readily correlate to specific, identifiable workers for the purpose of demographic research. This report measures workers using headcounts, which simply represent the number of individual workers based on census data. The breakout box at the beginning of section 2.1 provides more information about the two units used to measure employment.

Please note: Nordicity strongly cautions against making direct comparisons between the results of this research and Statistics Canada's PTCI. In particular, be aware that each of these approaches measure employment on a different basis.

Appendix E. NOC Occupational Classifications

The following table summarizes the occupational classifications that were used to identify and isolate workers in the culture sector. The table provides the NOC code/title, followed by the classification used to report on occupational function (in section 2.1). These columns are followed by a column for each of the three levels at which an occupation could be assigned to a specialization[15] (the lowest level of the taxonomy used to define the culture sector, as illustrated in section 1.3.4):

- NOC codes associated with a **primary specialization** draw workers from **all industries listed in the following appendix** into the specified specialization. When there is a conflict between the primary specialization of the occupation and that of a given industry, the primary specialization of the industry takes precedence.
    - In cases where primary specializations in this table are marked with an asterisk (*), the primary specialization associated with the occupation takes precedence over the primary specialization associated with workers' industry. In other words, workers with occupations marked with an asterisk are never included in any other specialization.
- NOC codes that have been assigned a **partial, high-priority** specialization draw workers from industries listed in the following appendix that have either a high- or low-priority match to the same specialization.
- NOC codes that have been assigned a **partial, low-priority** specialization draw all workers from industries listed in the following appendix that have a high-priority match to the same specialization.
- Where workers have an industry and occupational classification that was classified as **partial, high-priority** with different specializations, the workers were classified as being **employed across subsectors**, which is represented at the subsector level of the taxonomy.

NOC code and title	Function	Primary specialization	Partial, high-priority (requires industry match in same specialization)	Partial, low-priority (requires a high-priority industry match in same specialization)
0012 Senior government managers and officials	Other			
0014 Senior managers - health, education, social and community services and membership organizations	Other			

[15] Note that **Design & Advertising** has been simplified in this table to align with the classifications appearing in the body of the report. More precisely, the Design & Advertising specialization represents an aggregation of sub-specializations advertising, architecture, graphic design, industrial design, and interior design. The Design & Advertising sub-specializations were extracted from the data individually and then presented at the summary level in the report.

NOC code and title	Function	Primary specialization	Partial, high-priority (requires industry match in same specialization)	Partial, low-priority (requires a high-priority industry match in same specialization)
0015 Senior managers - trade, broadcasting and other services, n.e.c.	Managerial		Film & Television	Dance, Music, Theatre; Visual Arts & Crafts; Media Arts; Book and Magazine Publishing; Digital Media; Music Recording and Publishing; Design & Advertising;
0124 Advertising, marketing and public relations managers	Managerial		Design & Advertising	Visual Arts & Crafts; Film & Television; Digital Media; Design & Advertising;
0212 Architecture and science managers	Managerial		Design & Advertising	Museum;
0213 Computer and information systems managers	Managerial		Digital Media	Film & Television;
0411 Government managers - health and social policy development and program administration	Other			
0412 Government managers - economic analysis, policy development and program administration	Other			
0413 Government managers - education policy development and program administration	Other			
0414 Other managers in public administration	Other			
0511 Library, archive, museum and art gallery managers	Managerial		Library	Visual Arts & Crafts; Museum; Archives;
0512 Managers - publishing, motion pictures, broadcasting and performing arts	Managerial		Film & Television	Dance, Music, Theatre; Media Arts; Book and Magazine Publishing; Digital Media; Music Recording and Publishing;
1123 Professional occupations in advertising, marketing and public relations	Managerial		Design & Advertising	Visual Arts & Crafts; Film & Television; Digital Media; Design & Advertising;
1213 Supervisors, library, correspondence and related information workers	Managerial		Library	Archives;
1226 Conference and event planners	Managerial			Dance, Music, Theatre;
1253 Records management technicians	Technical	Archives		
1423 Desktop publishing operators and related occupations	Other		Book and Magazine Publishing	Literary Arts;
1451 Library assistants and clerks	Technical	Library*		
1452 Correspondence, publication and regulatory clerks	Technical		Book and Magazine Publishing	Literary Arts; Film & Television; Archives;
2151 Architects	Creative	Architecture*		
2152 Landscape architects	Creative	Architecture*		

NOC code and title	Function	Primary specialization	Partial, high-priority (requires industry match in same specialization)	Partial, low-priority (requires a high-priority industry match in same specialization)
2153 Urban and land use planners	Creative	Architecture*		
2173 Software engineers and designers	Creative		Digital Media	Media Arts; Film & Television;
2174 Computer programmers and interactive media developers	Creative		Digital Media	Media Arts; Film & Television; Museum;
2175 Web designers and developers	Creative		Design & Advertising	Media Arts; Film & Television; Digital Media;
2221 Biological technologists and technicians	Technical		Museum	
2223 Forestry technologists and technicians	Technical		Museum	
2224 Conservation and fishery officers	Creative		Museum	
2225 Landscape and horticulture technicians and specialists	Technical	Design & Advertising*		
2251 Architectural technologists and technicians	Technical	Design & Advertising*		
2252 Industrial designers	Creative	Design & Advertising*		
2253 Drafting technologists and technicians	Technical		Design & Advertising	Design & Advertising;
4011 University professors and lecturers	Other			
4012 Post-secondary teaching and research assistants	Other			
402 College and other vocational instructors	Other			
4031 Secondary school teachers	Other			
4032 Elementary school and kindergarten teachers	Other			
4162 Economists and economic policy researchers and analysts	Other			
4164 Social policy researchers, consultants and program officers	Other			
4168 Program officers unique to government	Other			
4169 Other professional occupations in social science, n.e.c.	Other			
5111 Librarians	Creative	Library*		
5112 Conservators and curators	Creative		Museum	Visual Arts & Crafts;
5113 Archivists	Creative	Archives*		
5121 Authors and writers	Creative		Literary Arts	Film & Television; Digital Media;

NOC code and title	Function	Primary specialization	Partial, high-priority (requires industry match in same specialization)	Partial, low-priority (requires a high-priority industry match in same specialization)
5122 Editors	Creative		Book and Magazine Publishing	Literary Arts; Film & Television; Digital Media;
5123 Journalists	Creative		Literary Arts	Book and Magazine Publishing; Film & Television; Digital Media;
5125 Translators, terminologists and interpreters	Creative		Literary Arts	Book and Magazine Publishing; Film & Television;
5131 Producers, directors, choreographers and related occupations	Creative		Film & Television	Dance, Music, Theatre; Media Arts; Digital Media; Music Recording and Publishing;
5132 Conductors, composers and arrangers	Creative	Music Recording and Publishing*		
5133 Musicians and singers	Creative	Dance, Music, Theatre*		
5134 Dancers	Creative	Dance, Music, Theatre*		
5135 Actors and comedians	Creative		Dance, Music, Theatre	Film & Television; Digital Media;
5136 Painters, sculptors and other visual artists	Creative	Visual Arts & Crafts		
5211 Library and public archive technicians	Technical		Library	Archives;
5212 Technical occupations related to museums and art galleries	Technical		Museum	Visual Arts & Crafts;
5221 Photographers	Creative		Visual Arts & Crafts	Design & Advertising;
5222 Film and video camera operators	Technical		Film & Television	Media Arts;
5223 Graphic arts technicians	Technical	Design & Advertising		
5224 Broadcast technicians	Technical		Film & Television	Media Arts; Music Recording and Publishing;
5225 Audio and video recording technicians	Technical		Film & Television	Media Arts; Digital Media; Music Recording and Publishing;
5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts	Technical		Film & Television	Dance, Music, Theatre; Media Arts; Digital Media; Music Recording and Publishing;
5227 Support occupations in motion pictures, broadcasting, photography and the performing arts	Technical		Film & Television	Visual Arts & Crafts; Media Arts; Digital Media; Design & Advertising;
5231 Announcers and other broadcasters	Creative		Film & Television	Media Arts; Music Recording and Publishing;
5232 Other performers, n.e.c.	Creative		Dance, Music, Theatre	Film & Television; Digital Media;
5241 Graphic designers and illustrators	Creative		Design & Advertising	Visual Arts & Crafts; Media Arts; Literary Arts; Book and Magazine Publishing; Film & Television; Design & Advertising;
5242 Interior designers and interior decorators	Creative	Design & Advertising*		
5243 Theatre, fashion, exhibit and other creative designers	Creative		Visual Arts & Crafts	Dance, Music, Theatre; Media Arts; Film & Television; Digital Media; Design & Advertising;

NOC code and title	Function	Primary specialization	Partial, high-priority (requires industry match in same specialization)	Partial, low-priority (requires a high-priority industry match in same specialization)
5244 Artisans and craftspersons	Creative		Visual Arts & Crafts	
5245 Patternmakers - textile, leather and fur products	Creative		Visual Arts & Crafts	Dance, Music, Theatre;
6316 Other services supervisors	Managerial			
7303 Supervisors, printing and related occupations	Other		Book and Magazine Publishing	Visual Arts & Crafts; Literary Arts;
7381 Printing press operators	Other		Book and Magazine Publishing	Visual Arts & Crafts; Literary Arts;
9471 Plateless printing equipment operators	Other		Book and Magazine Publishing	Visual Arts & Crafts; Literary Arts;
9472 Camera, platemaking and other prepress occupations	Other		Book and Magazine Publishing	Visual Arts & Crafts; Literary Arts;
9473 Binding and finishing machine operators	Other		Book and Magazine Publishing	Visual Arts & Crafts; Literary Arts;
9474 Photographic and film processors	Other	Visual Arts & Crafts		

Appendix F. NAICS Industrial Classifications

The following table summarizes the industrial classifications that were used to identify and isolate workers in the culture sector. The table provides the NAICS code/title, followed by a column for each of the three levels at which an industry could be assigned to a specialization[16] (the lowest level of the taxonomy used to define the culture sector, as illustrated in section 1.3.4):

- NAICS codes associated with a **primary specialization** draw workers from **all occupations listed in the preceding appendix** into the specified specialization. When there is a conflict between the primary specialization of the industry and that of a given occupation, the primary specialization of the industry takes precedence.
    - In cases where primary specializations in the occupations table (in the preceding appendix) are marked with an asterisk (*), the primary specialization associated with the occupation takes precedence over the primary specialization associated with workers' industry. In other words, workers with occupations marked with an asterisk in the preceding table are never included in any other specialization.
- NAICS codes that have been assigned a **partial, high-priority** specialization draw workers from occupations listed in the preceding appendix that have either a high- or low-priority match to the same specialization.
- NAICS codes that have been assigned a **partial, low-priority** specialization draw all workers from occupations listed in the preceding appendix that have a high-priority match to the same specialization.
- Where workers have an industry and occupational classification that was classified as **partial, high-priority** with different specializations, the workers were classified as being **employed across subsectors**, which is represented at the subsector level of the taxonomy.

313 Textile mills		Visual Arts & Crafts	
314 Textile product mills		Visual Arts & Crafts	
315 Clothing manufacturing		Visual Arts & Crafts	
316 Leather and allied product manufacturing		Visual Arts & Crafts	
321 Wood product manufacturing		Visual Arts & Crafts	
323 Printing and related support activities		Book and Magazine Publishing	

[16] Note that **Design & Advertising** has been simplified in this table to align with the classifications appearing in the body of the report. More precisely, the Design & Advertising specialization represents an aggregation of sub-specializations advertising, architecture, graphic design, industrial design, and interior design. The Design & Advertising sub-specializations were extracted from the data individually and then presented at the summary level in the report.

327 Non-metallic mineral product manufacturing		Visual Arts & Crafts	
332 Fabricated metal product manufacturing		Visual Arts & Crafts	
3343 Audio and video equipment manufacturing		Music Recording and Publishing	
3346 Manufacturing and reproducing magnetic and optical media		Music Recording and Publishing	
337 Furniture and related product manufacturing		Visual Arts & Crafts	
339 Miscellaneous manufacturing		Visual Arts & Crafts	
4143 Home furnishings merchant wholesalers		Visual Arts & Crafts	
4144 Personal goods merchant wholesalers		Visual Arts & Crafts	
4191 Business-to-business electronic markets, and agents and brokers		Book and Magazine Publishing	
4422 Home furnishings stores		Visual Arts & Crafts	
4483 Jewellery, luggage and leather goods stores		Visual Arts & Crafts	
4511 Sporting goods, hobby and musical instrument stores		Dance, Music, Theatre	Visual Arts & Crafts;
4513 Book stores and news dealers		Book and Magazine Publishing	Literary Arts;
4532 Office supplies, stationery and gift stores		Visual Arts & Crafts	
4539 Other miscellaneous store retailers		Visual Arts & Crafts	Media Arts; Film & Television; Digital Media;
5111 Newspaper, periodical, book and directory publishers		Dance, Music, Theatre	
5112 Software publishers		Dance, Music, Theatre	
5121 Motion picture and video industries	Film & Television		
5122 Sound recording industries	Music Recording and Publishing		
5151 Radio and television broadcasting	Film & Television		
5152 Pay and specialty television	Film & Television		
5171 Wired telecommunications carriers	Film & Television		
5191 Other information services		Digital Media	Visual Arts & Crafts; Media Arts; Literary Arts; Book and Magazine Publishing; Film & Television; Music Recording and Publishing; Museum; Archives; Library; Graphic Design;
5269 Other funds and financial vehicles			
5322 Consumer goods rental		Visual Arts & Crafts	

5331 Lessors of non-financial intangible assets (except copyrighted works)			
5413 Architectural, engineering and related services	Design & Advertising		
5414 Specialized design services		Design & Advertising	
5415 Computer systems design and related services		Digital Media	Industrial Design;
5418 Advertising, public relations, and related services		Design & Advertising	Visual Arts & Crafts; Media Arts; Film & Television; Digital Media;
5419 Other professional, scientific and technical services			Dance, Music, Theatre; Visual Arts & Crafts; Media Arts; Literary Arts; Book and Magazine Publishing; Film & Television; Archives; Library; Design & Advertising;
5619 Other support services			Dance, Music, Theatre; Visual Arts & Crafts; Media Arts; Literary Arts; Book and Magazine Publishing; Film & Television; Archives; Library; Design & Advertising;
611 Educational services		Digital Media	Library;
7111 Performing arts companies	Dance, Music, Theatre		
7113 Promoters (presenters) of performing arts, sports and similar events	Dance, Music, Theatre		
7114 Agents and managers for artists, athletes, entertainers and other public figures		Music Recording and Publishing	Film & Television;
7115 Independent artists, writers and performers			Dance, Music, Theatre; Visual Arts & Crafts; Media Arts; Literary Arts; Film & Television;
7121 Heritage institutions			Visual Arts & Crafts; Museum; Archives; Library;
8129 Other personal services		Visual Arts & Crafts	Dance, Music, Theatre; Media Arts; Film & Television; Design & Advertising;
8132 Grant-making and giving services			
8133 Social advocacy organizations			
8134 Civic and social organizations			
8139 Business, professional, labour and other membership organizations			
9112-9119 Other federal government public administration			
9120 Provincial and territorial public administration (9121 to 9129)			

9130 Local, municipal and regional public administration (9131 to 9139)			

Appendix G. Skills and Training Models to Explore

OnBoard Canada: www.onboardcanada.ca

"Work towards improving the representation of historically excluded groups in leadership across the country and helping organizations build strong, efficient, and diverse boards that meet the needs of their communities."

- Was initially a pilot but has since expanded nationally and provides online and accessible governance training at affordable rates for anyone working in any sector in Canada.
- Matches qualified individuals who have been historically excluded from leadership positions in Canada, such as Indigenous Peoples, members of the LGBTQ2+ community, people with disabilities, underrepresented immigrants, visible minorities and women, with nonprofit and public sector boards.
- As a result of its connection with the Chang School of Continuing Education at Ryerson University, OnBoard's work is evidence-based and supported by research initiatives.

CivicAction: DiverseCity Fellows: https://leadership.civicaction.ca/diversecityfellows

- For 10 years, this fellowship has provided diverse rising leaders in the Greater Toronto and Hamilton Area access to personal leadership resources and development, a network of peers, and mentorship opportunities for a one-year period.
- The program consists of skill development workshops, one-to-one professional coaching, development of a personalized leadership development plan, mentoring relationship with a prominent senior- level civic leader, and the opportunity to discuss city-building issues with peers.
- Over 200 alumni across all sectors and ethno-cultural backgrounds, religions, genders, and abilities have benefited from the program, many noting that it has aided in accelerating their careers and benefitting their communities and workplaces in meaningful ways.

Kingston Arts Council: Arts & Equity Project: http://www.artskingston.ca/the-arts-and-equity-project

- Project aims to introduce Kingston artists and arts organizers to equity tools, frameworks, and peer-to-peer learning opportunities in order to improve equity in the workplace and reduce barriers to community participation.
- Through the project's first phase, a series of three workshops, participants learned from peers and gained a greater awareness of equity-related issues. Workshops were centered around anti-oppression, intersectionality, and creating an equitable action plan for Kingston's arts community.
- As a result of the final workshop, 'Creating a Collective Action Plan', an Organization Audit Tool has been developed as a resource for the community.

Playwrights Guild of Canada: www.playwrightsguild.ca/pgc-webinars

"The Playwrights Guild of Canada hosts a series of exciting national and international webinars. Featuring provoking and insightful conversations between theatre-makers, and instructive lectures from experts on the business of playwriting, PGC webinars offer a range of resources to support, inform and inspire the careers of our members. The webinars are free and open to all PGC members, as well as members of the participating organizations."

- Professional Webinar Series: "Features expert facilitators on the business of playwriting, covering such topics as contracts, online marketing, and self-production."
- International Webinar Series: "Features conversations between Canadian playwrights and playwrights in other countries on a range of timely and provoking themes. In partnership with playwriting organizations in New Zealand, Scotland and Australia, PGC has co-hosted conversations on rural theatre, first peoples' playwriting, dramaturgy and more."

Theatre Ontario: www.theatreontario.org/training.aspx

Training consists of Courses and Workshops, Career Stream, Creator Stream, Summer Theatre Intensive, Adjudicators Symposium, Introduction to Adjudication, Weekend Intensives, Grant Writing Information Sessions, and Community Theatre Forums.

Courses & Workshops: "Theatre Ontario provides training opportunities for Ontario's theatre artists and creators."

- Ready, Set, Show!: Foundations of Indie Producing - Workshop
- Social Media for Producers Workshop
- smART Money: Personal and Project Finances Workshop
- Marketing on a Dime Workshop
- Tech Sessions (Ask an Expert): Create Your Professional Web Page
- Taxes for Theatre Artists Workshop
- Career Stream workshops "for those who want to learn and harness the basic tools and resources needed to thrive in the profession."
- Creator Stream workshops "for anyone looking to produce their own work or start their own theatre company."
- Members receive discounts on many of courses, workshops, and publications.

Mayor of London: Creative Enterprise Zones (UK): https://www.london.gov.uk/press-releases/mayoral/mayor-announces-first-creative-enterprise-zones

The creation of London's Creative Enterprise Zones is an initiative carried out by the Mayor of London, Sadiq Khan, which aims to support artists, cultural workers, and creative businesses by providing resources, affordable spaces, skill development and jobs in six of London's borough.

Of the 25 boroughs that applied, Lambeth, Croydon, Hounslow, Lewisham, Haringey, and Hackney & Tower Hamlets have been selected and are set to receive a share of £11 million.

Each CEZ will take on its own focus and have an emphasized goal, for example, Haringey will focus on supporting fashion and furniture manufacturing.

Collectively the CEZ are projected to generate tens of millions of pounds, 3,500 jobs and offer 40,000 square meters of affordable workspace for artists and creative businesses.

UK Research and Innovation: The Creative Industries Clusters Program (UK): https://ahrc.ukri.org/newsevents/news/major-new-research-investment-set-to-provide-boost-for-uks-creative-industries

An initiative led by UK Research and Innovation's Art & Humanities Research Council (AHRC) and funded by Industrial Strategy Challenge Fund which aims to "increase the use of digital technologies to improve audience experience in the screen and performance industries and shorten production times in the design industry."

The Creative Industries Clusters Program comprises nine creative clusters across the UK (Bristol, Leeds, London, York, Cardiff, Belfast, Dundee and Edinburgh) and a new Policy and Evidence Centre, led by Nesta in partnership with 13 universities.

In pooling the talents of UK's best performing and world-renowned creative businesses and arts and humanitarian researchers, this £80 million program's goal is to create jobs, drive entrepreneurship and company creation, and develop products that can be marketed globally and ultimately ensure viable economic prosperity in the UK.

Creative Industries Federation: Student Ambassadors Program (UK):
https://www.creativeindustriesfederation.com/news/further-details-federation-student-ambassador-programme

A pilot program for higher and further education students to act as representatives for the Creative Industries Federation at their universities and to spread news of events and opportunities in exchange for the insight, research and networking opportunities that come with membership to the Federation.

This program is ideal for those interested in pursuing a career in the creative industries.

The Student Ambassadors Program was inspired by feedback received from the youth delegation at the Federation's International Summit and will be used to further collect knowledge about the many different creative career options available to those emerging in the sector.