

An Initial Feasibility Study for Developing an Ontario Culture Sector Labour Market Information Panel

Summary of Findings

Presented by:



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1. Overview of Findings

WorkInCulture’s (“WIC”) main motivation for commissioning this initial feasibility study was to explore a more sustainable approach to gathering and sharing Labour Market Information (LMI) about Ontario’s broad culture sector. In 2019, WIC released its culture sector career sustainability report: *MakingItWork: Pathways Towards Sustainable Cultural Careers* (“MakingItWork”) which now serves as a benchmark profile of the sector across Ontario pre-COVID-19. At that time, Executive Director Diane Davy described MakingItWork as a first step towards a better understanding of Ontario’s culture sector, and the elements needed to support it. MakingItWork was based on an in-depth, custom data tabulation analysis from Statistics Canada’s 2016 Census, a sector-wide survey with over 1,000 responses and ten bilingual stakeholder roundtables facilitated across the province. This large-scale study has been proven to be valuable to the sector and its stakeholders but was nonetheless very resource intensive to execute. The richness of the census data is indispensable, but the four-to-five-year time lag between censuses is a major hurdle for a fast-changing sector that would benefit from more frequent monitoring and analysis. The need for up to date labour market data remains; policymakers need to make decisions based on the most recent picture of the culture sector to create policy that is well suited to support it.

In this context, WIC enlisted Nordicity to explore other approaches to gathering credible and consistent LMI data, with a particular focus on testing the **feasibility of developing a representative panel for the culture sector**. A panel being best understood as a group of recruited and representative survey respondents who have agreed to take part in surveys and/or other market research activities (e.g., roundtables, polls) on a periodic basis over a given timeframe. The goal was to shed light on alternative approaches – such as panels - that could be less resource-intensive for WIC to support as an organization, and simultaneously provide it with the ability to publish more timely LMI data about the culture sector. Options explored sought to meet the broad demands of culture sector stakeholders – from artists, employers and industry associations to post-secondary institutions, funders and governments.

This report summarizes the research steps taken and the conclusion that, while the need expressed is valid and widespread, the scale of these possible solutions is such that it would be difficult for WIC to lead such initiatives on its own. The culture sector is simultaneously too niche, in a sense, to take advantage of existing market research panels, and heterogenous enough to make the panel approach a complex undertaking without greater investment.

1.1 Research Methodology

There were three main inputs or streams to the research for this project. The methodology was iterative, in that as we continued to assess the feasibility of an LMI panel as a solution to the issues WIC had identified, the feedback pointed mainly to the challenges inherent in such an approach and our research questions evolved accordingly.

- **Phase 0: Understanding the Universe**
As a pre-cursor, a sampling exercise was conducted to determine the composition of a representative culture sector panel for Ontario.
- **Phase 1: Environmental Scan – What Models Exist?**
The first step was to find existing models from, for example, international jurisdictions or market research firms, who use panels to collect labour market information. An interview with PACT UK regarding its LMI/advisory was cancelled due to COVID-19.
- **Phase 2: Partnership Building**
Finally, Nordicity and WIC reached out to leading organizations in LMI in Canada to

better understand how they could work together in the future to facilitate stronger and more seamless LMI data collection for the culture sector.

2. Summary of Results

This section summarizes the results of the research and analysis initiatives carried out in Phase 0 and Phase 1 of this study.

2.1 Understanding the Universe Representative Panel Composition

In order to build an LMI panel, it is vital to understand the universe one is trying to represent. WIC’s most recent publication, *MakingItWork*, provides a pre-COVID snapshot of Ontario’s culture sector based on an analysis of a custom data tabulation from Statistics Canada’s 2016 Census. The sector is comprised of **274,220 individual workers** working full or part-time in Ontario’s Culture Sector. These culture sector workers were:

- Younger (slightly) and more concentrated in large urban centres than the overall workforce in Ontario.
- Highly-educated: Four in five (81%) culture sector workers held at least some kind of postsecondary credential compared to about two in three (65%) workers in Ontario overall.
- No more diverse than the province’s workforce: participation of persons of colour/members of visible minorities, as well as people who identified as Indigenous, slightly lagged the provincial average.
- Predominantly English-speaking: Culture sector workers were more likely to speak English at home than workers in Ontario in all sectors.
- Earned an average \$42,500 per year from arts-related activities, though this annual average dropped to \$34,200 when those working in the cultural industries were excluded from the sample.
- Earned approximately 80% of their total annual income from arts-related activities.

By subsector and specialization, that workforce was distributed as follows:

Table 1: 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. *MakingItWork 2019*

Through analysis it was concluded that, in order to sample the above population, a manageable, representative panel could have **20 or more members. A 50-member panel with the breakdown described in the table below would be more representative than a 20-member panel but would require more recruitment and management effort (and so on, for a 100-member panel).** In both scenarios, Museums and Heritage would be over-represented compared to the population (1.3% of culture sector).

Table 2: Representation on the panel based on Making It Work findings

	Scenario 1: 20 Member Panel	Scenario 2: 50 Member Panel
Subsector*:		
Arts	4	10
The Cultural Industries	14	36
Libraries	1	3
Museums and Heritage*	1	1
Total:	20	50
Size of urban centre:		
> 500,000 (78%)	16	39
100,000 - 500,000 (13%)	3	7
< 100,000 (8%)	2	4
Employment Equity Groups:		
Female-identifying (44%)	9	22
Member of visible minorities (26%)	5	13
Indigenous (1.3%)	1	1

*To ensure that the panel is representative of the specializations that constitute each subsector, members would be recruited on a rotating basis. For example, a member from the Museums specialization could be recruited for one term, followed by a member representing Archives, so as to have voices from both specializations on the panel.

2.2 Environmental Scan: What Models Exist?

To get a sense of the LMI environment, desk research was conducted to identify the various LMI gathering practices used internationally, including the ways panels are used for these purposes. International LMI gathering practices were reviewed from Canada, the UK, Egypt and India. Through a scan of secondary sources, including research reports, blog posts and government/association websites (see Appendix 1), it was concluded that **culture sector specific LMI panels do not obviously exist in quite the mode in which WorkInCulture intended to use them.**

National Approach

Where labour market panels *did* exist, they were on massive, nationally representative scales. Egypt and India have, for example, constructed representative panels through which they conduct longitudinal analysis to track changes in population, demographics and workforce.

These panels are used as a less strenuous way to get labour market information but are broad initiatives and not sector specific. For example, The Egypt LMI Panel consists of 20,000 participants who are surveyed every 3-8 years.

Advisory Approach

There was evidence of panel-like models for overall sector **advisory functions** rather than solely limited to labour market information. One such example is the PACT Council in England. PACT is the trade association representing the UK's Film, TV, and animation companies. They are governed by a Council consisting of industry stakeholders who provide insight to inform legislative decisions with the intent to support industry growth. PACT members also benefit from the mentorship of the PACT council, as they host webinars and workshops and share research materials. The PACT Council might provide informal, qualitative LMI insights periodically, but their main function is consultative and their LMI perspectives might not be representative of the UK's entire film, television and animation industry.

Market Research Panels

Panels are also put together by research and consulting firms to be **sold as a service for market research purposes**. These panels primarily provide commercial businesses with demographic information and feedback on their products. Select research and consulting firms advertise that they can devise panels for any kind of curated research needs, but generally do not provide much more information beyond that. One unique market research panel was VICE Voices. VICE Voices is an established panel in the UK and US composed of millennials, who are regularly underrepresented in market research contexts. The purpose of this panel is to gather consumer intel from this specific demographic.

Expert panels are regularly put together by government bodies to conduct consultations and research on certain industry-related topics, often resulting in the development of a set of recommendations and/or reports to be used to implement policy or procedural changes. These panels typically consist of qualified industry professionals representing different groups of stakeholders on the topic their panel is concerned with to avoid bias. Expert panels typically hold advisory roles. The Labour Market Research Council (LMIC) was put together in 2018 to address the issue of providing timely, reliable and accessible labour market information to Canadian stakeholders. A lot of the work they intended to do in their 2019-2020 operational plan revolved around assessing the feasibility of attaining more local, granular, timely and reliable LMI. As such, they were interviewed in Phase 2 of this engagement.

2.2.1 Market Research Firms Capabilities

Nordicity conducted two interviews, with Kantar Research and Delvinia, and received a package of product offerings from IPSOS. Overall findings are mentioned below:

- **Complex Ask, Daunting Task:** Both Kantar and Delvinia do not think that a culture sector specific market research panel would be an easy or straightforward undertaking.
- **Primarily B2C Market Research firms:** Both of these companies have more experience in the B2C than the B2B realm. The WIC LMI panel would tend to be more of a B2B approach:
 - B2C panels are composed of certain market segments that are the intended customer base for the company organizing the panel (e.g., a brand seeking a certain demographic).

- A B2B panel is composed of representatives from certain businesses to gather insights related to their respective organizations' operations, finances, etc.
- **Nuances of the Cultural Workforce:** Both cite the cultural workforce as hard to “nail down” in a digital context. This workforce (according to the firms) is not always in front of a computer (i.e. performers, production workers spend a lot of time on site), a major mode for data collection and monitoring.
- **Panel Management and Comparability:** Panels are primarily managed online and it is hard to keep participants for an extended period of time. Most participants stay enrolled for a period of 3 to 6 months. If WIC wanted to nurture and manage a consistent panel over a longer period, it would require quite regular engagement (e.g., newsletters and other supports).
- **Costly:** As both firms would need to design a bespoke solution, both suggested the cost would be high. Delvinia's proposed solution, described below, would cost roughly \$2000 to program and project manage a 10-15 minute survey to participants, plus \$65 per completed response (this fee includes incentives for the completes and those that screen). As such, for a universe of 300 completed responses, the panel might cost around \$21,500 per consultation.
- **An option:** Delvinia proposed that, assuming 2% of Ontarians are part of the cultural sector, they could deliver a sample of about n=300 Ontario culture sector workers, as a sub-set of one of their existing panels i.e., to the participants flagged as culture sector workers. As the panel matured, Delvinia could aim to recruit more and more individuals from these sectors to increase the sample size.

3. Building LMI Capacity through Partnerships

WorkInCulture and Nordicity conducted interviews with two Canadian Labour Market Information associations, the Information and Communications Technology Council (ICTC) and the Labour Market Information Council (LMIC), to gain an understanding of their approaches to collecting LMI. The outcomes of these discussions are outlined in the sections below.

3.1 Information and Communications Technology Council (ICTC)

ICTC was set up 25 years ago as a not-for-profit sector council providing research and expertise on the digital economy to Canadians. Specifically, it provides industry research to the government and other stakeholders on LMI and the social and economic impacts of both emerging and existing information and communication technologies. As a neutral policy advisor, ICTC regularly publishes reports on the state of the industry which are informed by both qualitative and quantitative research methods. ICTC's LMI data gathering approaches are varied, from attaining raw data from Statistics Canada to launching bespoke surveys and consultations.

Job Board Scraping

ICTC also gathers data from various job boards to identify needed skills within the ICT sector. Job board scraping allows for a level of granularity in analysis; based on the location of position vacancies and the needed skills and wage information provided, the sector can be mapped and clusters where skills deficits exist can be identified. Job descriptions might also provide detail into wages and languages used. A consistent challenge they face is attributing these insights to certain demographic groups (e.g. gathering data on the skills gaps that exist in indigenous communities). Gathering trends in the tech sector in particular poses a challenge as it continues to permeate all existing sectors, including culture. Staying ahead of the rapidly changing tech environment and its continually evolving skills needs emphasizes their need for regular LMI data.

ICTC works regularly with LMIC, who provide them with data from Statistics Canada in a pre-coded, consistent format for analysis. One of their staff members sits on LMIC's Expert panel. On past, large-scale engagements, ICTC has put together Steering Committees to provide feedback on the process. They mention they have not really used panels to gather LMI on past engagements.

3.2 Labour Market Information Council (LMIC)

As mentioned in Section 3, LMIC was created in 2018 to improve the timeliness, reliability and accessibility of labour market information to facilitate decision-making by employers, workers, job seekers, academics, policy makers, educators, career practitioners, students, parents and under-represented populations¹. LMIC's work focuses on collecting LMI for Canada's industry stakeholders broadly, and its sector-specific knowledge is limited to those it works most closely with (for example, the culture sector is mainly represented through tourism from LMIC's perspective). LMIC's main source of incoming data is from Statistics Canada with input from the results of the National Canadian Labour Force Survey and web scraping skills data through Vicinity Jobs. LMIC obtains micro-data from the census that is not publicly available, and that it will share with the groups it works with based on stated needs and requests. LMIC works

¹LMIC | About <https://lmic-cimt.ca/about/>

directly with sector councils to provide them with custom tabulations of data based on their particular needs. Skills mapping is something LMIC is interested in pursuing further.

LMIC collaborates regularly with Statistics Canada. Most recently LMIC has been working with Statistics Canada to set up new, publicly available data sets with commonly used cross-tabulations. Additionally, LMIC informed us that the NAICS updates in 2021 will include new job titles to better reflect the digital workforce. Due to the current pandemic situation, their work has pivoted slightly. LMIC is in the process of working with Tourism HR Canada to get short insights related to the tourism sector based on the current crisis which will then be made into a report. This is the first time LMIC has worked on a report in partnership with a sector council.

As LMIC is a fairly new group, its sector-specific knowledge internally is limited to those groups it works with most regularly. At the time of consultation, LMIC expressed that it has not worked much, if at all, with the culture sector, and it would be interested in connecting with WIC and reviewing MakingItWork. LMIC is in the process of revising its National Stakeholder Advisory panel to include people who have not been traditionally part of the process, specifically those sector stakeholders who are on the front lines using LMI to inform their staffing decisions. Having culture sector representation here might encourage LMIC to consider more regularly including the culture sectors in their LMI gathering initiatives.

4. Conclusions

Based on the results of our research and consultations, it does not appear that culture-specific LMI panels exist for the purposes set out in this study. We learned that:

- Countries with large, disparate populations use representative panels to conduct longitudinal analysis on LMI and household trends as a means of simplifying the data collection process
- Market research panels are put together for various reasons to collect consumer insights. Through interviews with Delvinia and Kantar Research, it was mentioned that the culture sector is particularly difficult to nail down to participate in market research due to the active nature of their jobs (i.e. shooting on location, performing). Both companies had not regularly worked with the culture sector.
- Expert panels are regularly put together for advisory purposes by government organizations to inform policy decision-making, but may be less useful for accessing comparable LMI data
- Both ICTC and LMIC do not regularly use panels to get LMI. LMIC does not have much experience working with the culture sector in general but is a nascent organization and would be worth connecting with WIC.
- StatsCan will be updating their NAICS codes next year; hopefully more culture sector occupations will be represented at this level moving forward. LMIC noted that many new digital specific occupations will be added.
- A representative panel of Ontario’s culture sector could be built, but it would require a major, coordinated effort and investment.
 - Approximately 50 people would have to be recruited from various background for it to be accurately representative;
 - Maintaining the groups participation over time would be a challenge.
 - If WIC were to pursue this course of action, it may be as wise and efficient to initiate a Canada-wide panel with partners from every Province and Territory, as well as Federally-funded institutions – perhaps modeled on the ICTC approach for ICT. But of course, this solution runs contra to WIC’s desire for an easier and more cost-effective way to collect this information.

Bearing in mind the context of COVID-19, and the recovery of the culture sector in Ontario, the following steps are recommended:

- Position MakingItWork as the pre-COVID benchmark for Ontario’s culture sector workforce against which post-COVID recovery initiatives can be measured.
- Mine alternative data sources for ongoing “pulse checks” on the culture sector labour market. For example, leverage WIC’s job board to get insights into in-demand skills in the sector on a consistent basis.
- Develop and maintain a relationship with LMIC to encourage culture-sector representation in future StatsCan/Federal LMI gathering initiatives. Support LMIC’s familiarization with WIC, MakingItWork and the nature of the culture sector workforce.