# MakingItWork

Pathways toward sustainable cultural careers

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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

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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# Executive Summary

**Context and Mandate**

*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<br>Dance, Music, Theatre<br>Literary Arts | Digital Media<br>Design & Advertising<br>Film & Television<br>Book & Magazine Publishing<br>Music Recording & Publishing | Libraries | Museums<br>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.