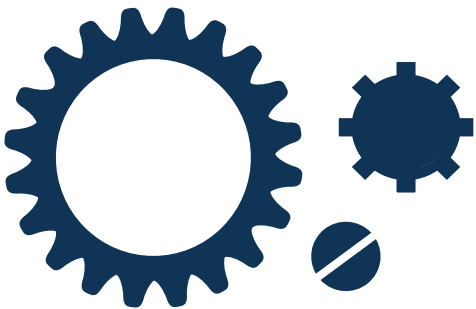




CULTIVATING OUR CULTURAL WORKERS

Realities of New Brunswick's arts and culture workforce



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Realities of New Brunswick's arts and culture workforce

Prepared for ArtsLink NB

Prepared by Jupia Consultants Inc.



ArtsLink NB is a member-based arts service organization, founded in 2009 to advance the arts in New Brunswick by linking and unifying artists and arts organizations and promoting their value. We represent New Brunswick artists of all disciplines from across the province.

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MESSAGE FROM MINISTER TREVOR HOLDER



The Government of New Brunswick is pleased to support the production of this ArtsLink NB report on the province's arts and culture sector. *Cultivating our Cultural Workers: Realities of New Brunswick's arts and culture workforce* provides valuable insight on how this sector's people and organizations contribute to the social and economic fabric of our province.

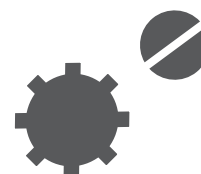
Our government acknowledges and celebrates these contributions. We are also eager to learn more about and help identify the challenges and opportunities facing the thousands of people who work in this industry. I believe there is unlimited potential in the promotion and expansion of our own arts and culture. New Brunswickers have much to offer the rest of the world in this respect and, more and more, our own residents have come to appreciate the many gifted artists and storytellers who call our province home.

Training and education are a means of growing this sector. We strongly believe that all post-secondary education institutions have a role to play in preparing people for the careers of tomorrow. A large part of our mission is helping to identify future needs and opportunities for our province— and then working to ensure that the necessary training programs are put in place to address those needs and opportunities. Training people for careers in this industry is no different.

From the earliest Indigenous populations to recent newcomers seeking a better life, New Brunswick is blessed with a diverse array of people who have unique perspectives on themselves and the world around them. Their expressions — through art, song, dance, theatre, film and other media — help reflect who we are as a province. I thank ArtsLink NB for its continued work in promoting the efforts of these individuals and for sharing its findings with us in the form of this report.

A handwritten signature in blue ink, appearing to read 'T. Holder'.

Minister Trevor Holder
Department of Post-Secondary Education, Training and Labour



MESSAGE FROM ARTSLINK NB

In 2013, ArtsLink NB and David Campbell published *Sustaining New Brunswick's Arts and Culture Workforce*, the first in depth report examining the scope and impact of New Brunswick's arts and culture sector on the province's economy and quality of life. This report has been a guiding document for the sector as we devise strategies and advocate for the improvement to the socio-economic status of artists in our province.

By revisiting this research, we recognize the changing landscape of New Brunswick's cultural sector and the availability of new statistics and research. For these reasons, this is an excellent time to survey the cultural workforce and examine changes, new challenges, and strategic growth areas.



ArtsLink NB would like to thank economic development consultant David Campbell for designing the surveys and providing a detailed analysis of the information provided in order to develop the key recommendations outlined in this report. We would also like to thank the arts and culture community who engaged with us on this project for their important contributions to the province of New Brunswick and beyond.

This report recommends measures to foster a healthy arts and culture sector, and outlines the strong economic impact this sector, its workers, and its organizations have on the province. Artists have unique needs, but when addressing their challenges the report also touches on struggles of small business owners and self-employed workers. By examining labour force needs for culture industries this report addresses challenges surrounding job creation and a strong labour market in other fields as well.

In addition, we have investigated regional and national statistics to identify potential growth markets and industry needs. In the context of other important projects currently underway, such as the research by the Premier's Task force on the Status of the Artist, and the *Trajectoire 18>23 Renewed Global Strategy*; the report is both relevant and timely.

We wish to thank the Department of Post-Secondary Education, Training and Labour and the Department of Tourism, Heritage and Culture for their ongoing support and investment in arts and culture industries.

We believe that this report and its findings will encourage meaningful measures to strengthen the contribution of the arts and culture sector, and affirm that arts and culture are vital to our quality of life and social and economic well-being.

A large, stylized handwritten signature in black ink that reads "Julie Whitenect".

Julie Whitenect, Executive Director
ArtsLink NB





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INTRODUCTION

The arts and culture sector (a.k.a. culture industries) is very important to New Brunswick's economy and society. Not only is culture a major contributor to provincial gross domestic product (GDP) and employment, it has a value well beyond this economic contribution. Artists tell New Brunswick stories, reflect and shape New Brunswick culture, and foster creativity across society. The arts and cultural sector boosts our quality of life and helps make New Brunswick a better place to live.

Approximately 7,600 people work in New Brunswick's culture industries and approximately 6,220 people work in the arts and culture workforce (as defined below). Not everyone working in a culture industry is an artist (e.g. people work in administration, finance, and other non-artistic or cultural occupations) and not every artist is working in a cultural industry (e.g. artists work in the manufacturing sector). Definitions of the arts and culture sector, as well as the arts and culture workforce, are found on the next page.

This report is organized into four sections:

1. THE ECONOMIC CONTRIBUTION looks at the economic contribution of the arts and culture sector in New Brunswick. Using the most recent Statistics Canada data, it shows the sector's output, gross domestic product, employment, trade balance and other factors.

3. THE ARTISTS' PERSPECTIVE includes the results of a survey of the arts workforce in New Brunswick conducted for this report. Over 250 people responded to this survey and provided important insight into their work, revenue generation, markets, education and other factors.

2. ARTS AND CULTURE WORKFORCE provides an overview of the arts and culture workforce using data from Statistics Canada's 2016 Census. It looks at a wide variety of factors including employment by detailed occupation and industry, income, education, migration, and immigration.

4. MOVING FORWARD extracts insight from the first three sections and looks at ways the arts and culture workforce, as well as culture industries, could be supported and strengthened in the years ahead.

This report provides a detailed review of the arts and culture workforce in New Brunswick based on secondary sources such as Statistics Canada and a primary survey of more than 250 New Brunswick artists. It also provides a summary of the economic contribution to the province and trends in the culture sector. Based on this insight, the report provides considerations and recommendations that relate to how the arts and culture workforce can be strengthened for the future.



DEFINITIONS

For this report, Statistics Canada is the main source of data so the report uses their definitions and associated data for both culture industries and the arts and culture workforce.

CULTURE INDUSTRIES

In 2017, cultural activity in New Brunswick generated \$957 million worth of output, contributed \$550 million to the provincial gross domestic product (GDP) and supported 7,570 jobs across the province. The activities included in Statistics Canada's definition of culture industries are shown in Table 1 and include heritage-related activities, performing arts, visual and applied arts, written works, audio-visual and interactive media, sound recording, related education and governance, and sports-related activities.

Table 1: **CULTURE INDUSTRIES IN CANADA BY SUBSECTOR**

HERITAGE AND LIBRARIES: Includes archives, libraries, culture heritage and natural heritage.

LIVE PERFORMANCE: Includes performing arts as well as festivals and celebrations.

VISUAL AND APPLIED ARTS: Includes original visual art, art reproductions, photography, crafts, design, architecture, and advertising.

WRITTEN AND PUBLISHED WORKS: Includes books, periodicals, newspapers, and other published works.

AUDIO-VISUAL AND INTERACTIVE MEDIA: includes film and video, broadcasting, interactive media.

SOUND RECORDING: Includes music publishing and sound recording.

EDUCATION AND TRAINING (CULTURE).

GOVERNANCE, FUNDING AND PROFESSIONAL SUPPORT (CULTURE).

SPORTS: Includes organized sport, informal sport, education and training (sport) as well as governance, funding and professional support (sport).

ARTS AND CULTURE WORKFORCE

Table 2 shows the occupations included in the arts and culture workforce. The workforce includes related management occupations, professional occupations as well as technical occupations in arts and culture.

Table 2: **THE CULTURAL WORKFORCE IN CANADA BY OCCUPATIONAL GROUP**

MANAGERS in art, culture, recreation, and sport (NOC group 051)

PROFESSIONAL OCCUPATIONS IN ARTS AND CULTURE (NOC group 51)

Librarians, archivists, conservators and curators

Writing, translating and related communications professionals including authors and writers, editors, journalists as well as translators, terminologists and interpreters

Creative and performing artists including producers, directors, choreographers and related occupations; conductors, composers and arrangers; musicians and singers; dancers; as well as actors and comedians.

Painters, sculptors and other visual artists

TECHNICAL OCCUPATIONS IN ART, CULTURE, RECREATION, AND SPORT (NOC group 52)

Technical occupations in libraries, public archives, museums and art galleries including library and public archive technicians and other technical occupations related to museums and art galleries

Photographers, graphic arts technicians and technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts including photographers; film and video camera operators; graphic arts technicians; broadcast technicians; audio and video recording technicians and other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts. This occupational group also includes support occupations in motion pictures, broadcasting, photography and the performing arts.

Announcers and other performers, not elsewhere classified.

Creative designers and craftpersons including graphic designers and illustrators; interior designers and interior decorators; theatre, fashion, exhibit and other creative designers; artisans and craftpersons and patternmakers - textile, leather and fur products.

Athletes, coaches, referees and related occupations.



THE ARTS AND CULTURAL
SECTOR BOOSTS OUR
QUALITY OF LIFE
AND HELPS MAKE
NEW BRUNSWICK A
BETTER PLACE TO LIVE.

1. THE ECONOMIC CONTRIBUTION

This section looks at the economic contribution of the arts and culture sector in New Brunswick. Using the most recent Statistics Canada data, it shows the sector's output, gross domestic product, employment, trade balance and more.



THE NB CULTURE SECTOR GDP RANKS LAST AMONG PROVINCES



The culture sector output in 2017 was \$957 million.

\$550 million provincial gross domestic product (GDP). By comparison, culture generates a higher GDP than agriculture, pulp and paper manufacturing, information technologies (IT), seafood manufacturing, or mining.

NB's culture sector GDP per capita ranks last among the 10 provinces.

There were 7,570 individuals working in the arts and culture sector in 2017, 1,600 fewer than in 2010.

Relative to the national arts and culture sector, New Brunswick has more people employed in heritage and libraries, festivals and celebrations, newspapers, broadcasting, and interactive media; but considerably fewer employed in visual art, crafts, design, book publishing, film, and video, and sound recording.

The contribution from broadcasting, education, and training and governance, funding and professional support is expanding. The culture sector is changing rapidly – the economic contribution from visual and applied arts, performing arts, and written works has been declining while the contribution from broadcasting, education and training, governance, funding, and professional support is expanding.

New Brunswick has large a cultural trade deficit. The province imported \$808 million worth of cultural products and services in 2015 and exported only \$233 million for a deficit of \$575 million.

Only Ontario has a cultural trade surplus among the 10 provinces. New Brunswick ranks 7th among the 10 provinces for its relative trade deficit, exporting only 29 cents for every dollar of cultural imports.

One of the characteristics of New Brunswick's culture sector is a lack of anchor organizations (over 50 employees). Larger organizations tend to have more potential to invest in innovation, develop export markets, and access a broader array of funding sources. Most of the firms and organizations in the province's culture industries are very small, with fewer than five employees. The sector could achieve greater vitality with an investment in capacity building.

Compared to most provinces New Brunswick receives far less government funding for arts and culture. For example, the province ranks 9th for Canada Council for the Arts funding per capita.

Under audio-visual and interactive media, the broadcasting sector is the main contributor to the trade deficit. New Brunswick imports \$146 million worth of broadcasting activity while exporting only \$20 million.

The public and private sectors in New Brunswick spent 27 cents on governance, funding and professional support for the culture sector for every dollar of output in 2017. Between 2010 and 2017, culture sector output declined by 10 percent while spending on governance, funding, and professional support for the culture sector rose by 16 percent.



\$575M
cultural trade deficit

New Brunswick imported \$808 million in cultural products and services in 2015 and exported only \$233 million.

THE CULTURAL
SECTOR COULD
ACHIEVE GREATER
VITALITY WITH
AN INVESTMENT
IN CAPACITY
BUILDING.



\$0.29
in cultural exports for
every \$1 in cultural imports

New Brunswick ranks 7th among the 10 provinces for its relative trade deficit.

1.1 CULTURE AND THE ECONOMY

In 2017, culture industries in New Brunswick generated nearly one billion dollars' worth of output (\$957 million), contributed \$550 million to the provincial gross domestic product (GDP), and supported 7,750 jobs across the province. As shown in Table 3, the GDP contribution from the culture sector declined by 6 percent between 2010 and 2017.

Table 1 shows how New Brunswick compares to the other 9 provinces and Canada overall. Per capita New Brunswick generated \$718 in culture industries GDP in 2017, the lowest among the 10 provinces and less than half the national contribution.

Between 2010 and 2017, cultural GDP in New Brunswick declined by 6 percent while rising by a robust 16 percent across the country. New Brunswick's overall economy grew very slowly during this period while growth was healthy across the country. There is a strong correlation between culture industries' growth and the economy overall.

As shown in Table 4, there are a number of specific cultural subsectors that have lost ground in recent years. Part of the decline has to do with larger trends in media and the shifting sources of cultural content (e.g. the decline in newspaper and periodical GDP). However, some subsector decline is more challenging to define. The significant drop in GDP from the craft sector, for example, is concerning.

Table 3: **CULTURE INDUSTRIES' ECONOMIC CONTRIBUTION, NEW BRUNSWICK (2017)**

Output (\$M)	\$957 million
GDP (\$M)	\$550 million
GDP per capita	\$718
GDP % change (2010-2017)	-6%
Jobs	7,570
Jobs per 100,000 population	987

Source: Statistics Canada Table 36-10-0452-01.

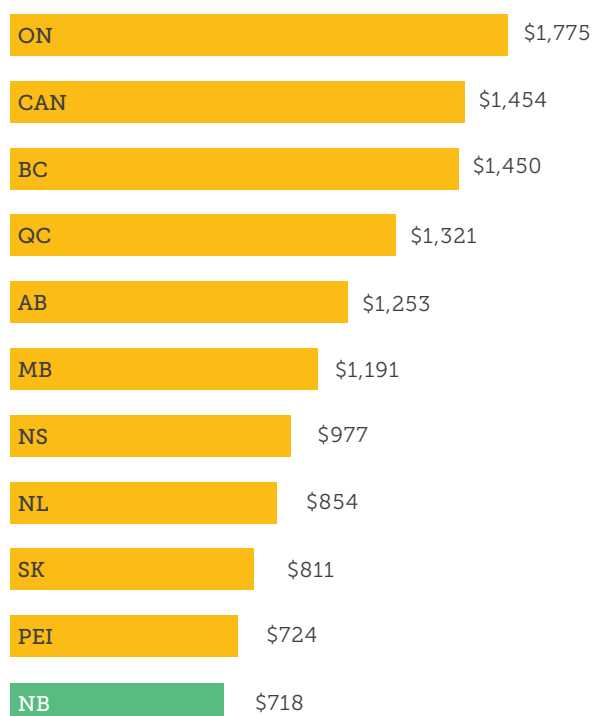
NB'S CULTURE SECTOR economic footprint

\$550 million GDP
from 1.9% of the workforce

Supporting over
7,570 jobs

NB's culture sector generates more GDP than any one of the agriculture, pulp and paper manufacturing, IT, seafood manufacturing or mining.

Fig. 1: **CULTURE INDUSTRIES GDP CONTRIBUTION**
Per capita, BY PROVINCE



Source: Statistics Canada Table 36-10-0452-01

In 2010 the craft sector generated \$70 million worth of GDP in New Brunswick, and by 2017 that had declined to only \$10 million. The decline in performing arts related GDP – from \$34 million in 2010 to \$27 million in 2017 is also a concern and is likely related to the importation of performing arts activity over the period (See Section 1.7). Statistics Canada does not provide reasons why GDP has declined.

Some subsectors have witnessed an increased GDP contribution in recent years, as shown in Table 5. The GDP contribution from broadcasting has increased significantly, as has the economic activity associated with education and training. The largest gains in absolute terms are from governance, funding, and professional support, which in 2017 generated nearly \$158 million worth of GDP in New Brunswick. This domain includes activities that finance, promote, regulate, and sustain all stages of the creative chain, with a particular emphasis on the supply of culture content. This support is provided by all levels of government, businesses, and the not-for-profit sector. Education and training activities have also seen an increase in GDP, including the training of culture creators (e.g. dance, theatre, film and art-related schools), culture interpreters, and culture consumers at all ages and stages of development.

ARE GOVERNANCE AND SUPPORT FOR THE CULTURE SECTOR TOP-HEAVY?

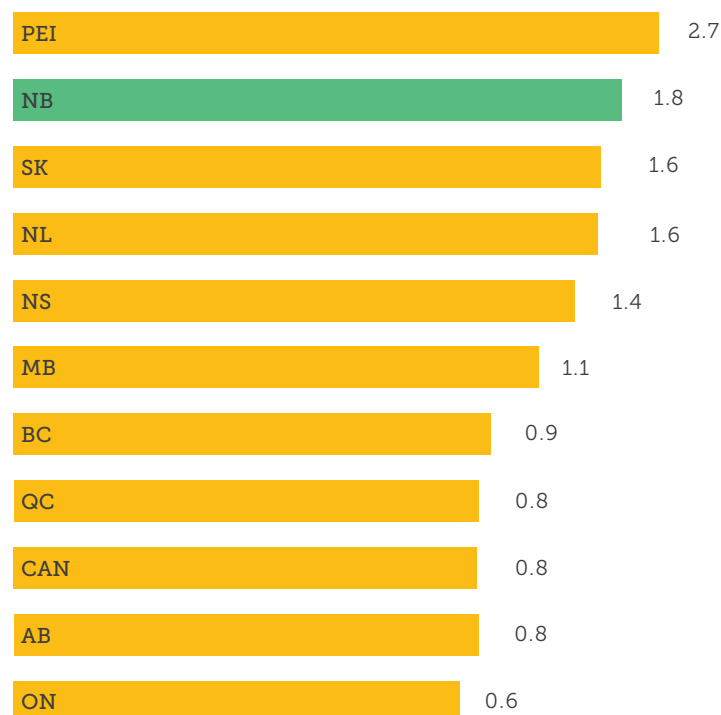
Together public and private sectors in New Brunswick spent 27 cents on governance, funding, and professional support for the culture sector for every dollar of output in 2017. According to Statistics Canada, governance, funding, and professional support are defined as, "activities that finance, promote, regulate, or sustain all stages of the creative chain, with a particular emphasis on the supply of culture content". Between 2010 and 2017, culture sector output declined by 10 percent while spending on governance, funding, and professional support for the culture sector rose by 16 percent. As shown in the chart, New Brunswick has 1.8 workers in governance, funding, and support for every \$1 million in culture sector output, which is the second highest concentration of workers among the 10 provinces. On a relative basis, small provinces tend to spend a lot more in this area than larger ones.

Table 4: GDP CONTRIBUTION (\$000S) AND PERCENTAGE CHANGE BETWEEN 2010 AND 2017, SELECTED SUBSECTORS WITH DECLINING ECONOMIC ACTIVITY, NEW BRUNSWICK

DOMAIN	2010	2017	% of change
Culture sector, total	\$587,717	\$550,379	-6%
Heritage and libraries	\$11,792	\$10,988	-7%
Performing arts	\$33,993	\$25,679	-24%
Festivals and celebrations	3,742	\$2,371	-37%
Visual and applied arts	\$130,645	\$53,720	-59%
Photography	\$12,967	\$7,017	-46%
Crafts	\$70,066	\$10,311	-85%
Design	\$20,867	\$13,278	-36%
Written and published works	\$104,262	\$89,103	-15%
Books	\$4,998	\$3,991	-20%
Periodicals	\$12,577	\$8,116	-35%
Newspapers	\$51,207	\$39,297	-23%
Film and video	\$15,096	\$14,216	-6%
Interactive media	\$46,985	\$43,843	-7%

Source: Statistics Canada Table 36-10-0452-01.

Fig. 2: NUMBER OF WORKERS IN CULTURE SECTOR GOVERNANCE, FUNDING, AND PROFESSIONAL SUPPORT PER \$1 MILLION IN CULTURE SECTOR OUTPUT



Source: Statistics Canada Table 36-10-0452-01

1.2 EMPLOYMENT BY SECTOR

Table 6 shows the number of people employed in the culture sector by domain. The table also compares employment intensity in New Brunswick to the country overall. New Brunswick has 54 percent more people employed in the heritage and libraries sector compared to Canada overall (as a share of total culture sector employment). There are more than 750 people employed in performing arts which is a similar proportion to the country overall. In the visual and applied arts domain, there are considerably fewer employed in crafts, advertising, and design (which includes graphic design, interior design, etc.). The newspaper sector still employs more than 500 people in the province which is well above the national employment level adjusted for population (this despite a major drop in employment in recent years).

Table 5: GDP CONTRIBUTION (\$000S) AND PERCENTAGE CHANGE BETWEEN 2010 AND 2017, SELECTED SUBSECTORS WITH INCREASING ECONOMIC ACTIVITY, NEW BRUNSWICK

DOMAIN	2010	2017	% of change
Broadcasting	\$87,302	\$108,097	+24%
Sound recording	\$2,515	\$2,799	+11%
Education and training (culture)	\$29,064	\$34,161	+18%
Governance, funding, and professional support (culture)	\$115,842	\$157,725	+36%

Source: Statistics Canada Table 36-10-0452-01.

New Brunswick only has 220 workers in the film and video sector. Compared to the rest of the country, the employment variance in this sector is the highest, with 71 percent fewer workers than Canada overall, as a share of total culture sector employment. New Brunswick has considerably more employed (as a share of total employment) in governance, funding and professional support for the culture sector (1,751) when compared to the country overall.

Table 6: CULTURE EMPLOYMENT IN NEW BRUNSWICK BY SECTOR (2017)
EMPLOYMENT INDEX COMPARES NEW BRUNSWICK EMPLOYMENT TO CANADA OVERALL (CANADA = 1.00)*

DOMAIN	Employed:	1.00:	DOMAIN	Employed:	1.00:
Culture sector, total	7,570		Written and published works	1,325	1.05
Heritage and libraries	309	1.54	Books and periodicals	125	.045
Live performances	833	1.05	Newspapers	509	1.75
Performing arts	754	1.00	Other publishing	692	n/a
Festivals and celebrations	79	1.71	Audio-visual & interactive media	1,574	0.87
Visual and applied arts	1,130	0.66	Film and video	220	0.29
Original visual art	48	0.73	Broadcasting	609	1.17
Photography	122	0.81	Interactive media	744	1.38
Crafts	223	0.67	Sound recording	55	0.51
Advertising	202	0.52	Education and training (culture)	537	0.88
Architecture	152	0.88	Governance, funding and professional support (culture)	1,751	1.87
Design	380	0.66			

*The employment index shows how employment in New Brunswick compares to the level across the country. A number above 1.00 means more employed as a share of the total workforce than the country overall.

Source: Statistics Canada Table 36-10-0452-01.

The number of people employed in New Brunswick's culture sector dropped by 18 percent between 2010 and 2017 (over 1,600 in total), but increased by 7 percent across Canada. Table 7 shows the subsectors and domains that were responsible for the largest changes in employment between 2010 and 2017.

The performing arts sector lost 349 jobs (net) between 2010 and 2017 dropping from 1,103 to 754.

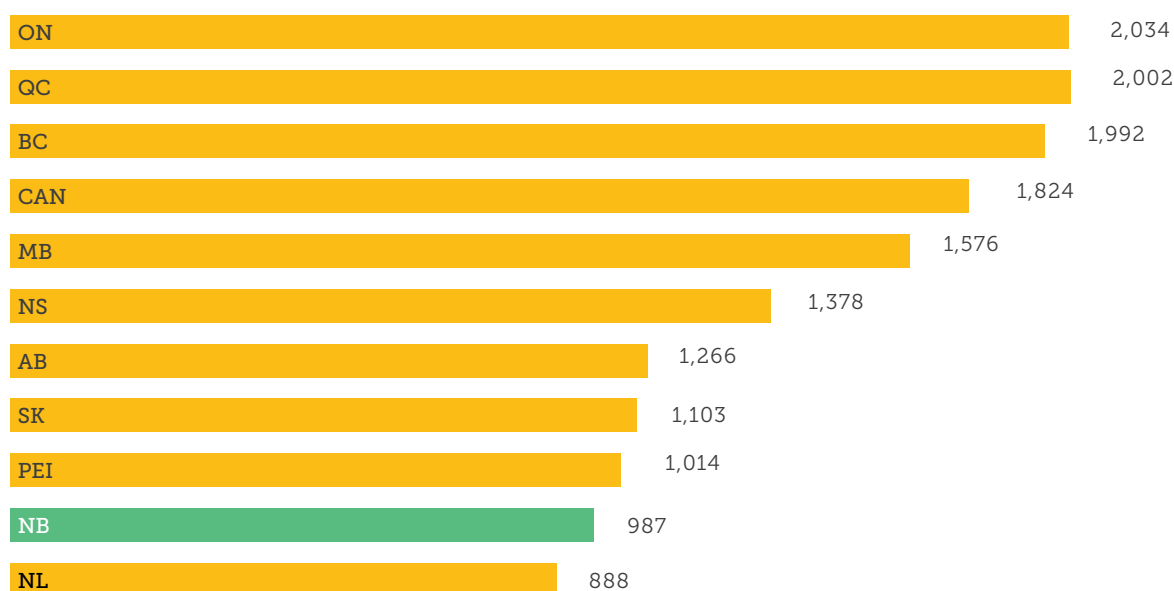
The newspaper sector was the other sector to see substantial employment losses over the 2010-2017 period, shedding a net 356 jobs. The only subsector to witness a steep increase in employment was interactive media, which added over 200 net new jobs over the seven years. As shown in Table 6, there are now 38 percent more people employed in interactive media as a share of total culture sector employment, compared to the country overall.

Table 7: CHANGE IN EMPLOYMENT, 2010-2017, NEW BRUNSWICK

DOMAIN	Employment change (2010-2017)
Culture sector, total	-1,613
Heritage and libraries	-113
Performing arts	-349
Visual and applied arts	-598
Photography	-164
Crafts	-339
Written and published works	-493
Books and periodicals	-75
Newspapers	-356
Film and video	-102
Broadcasting	-23
Interactive media	+209
Sound recording	-38
Education and training (culture)	-42

Source: Statistics Canada Table 36-10-0452-01.

FIG. 3: EMPLOYMENT IN THE CULTURE SECTOR PER 100,000 POPULATION (2017)



Source: Statistics Canada Table 36-10-0452-01

Adjusted for population size, only Newfoundland and Labrador has fewer people employed in cultural activities (Figure 3). There are 987 people employed in the culture sector in New Brunswick for every 100,000 people.

By way of comparison, if New Brunswick was to reach the national employment level in culture industries, the province would more than double the number of total jobs, from 7,570 to more than 15,000.

1.3 SUBSECTOR: PERFORMING ARTS

The performing arts subsector generated \$48 million worth of output across New Brunswick in 2017, which resulted in a \$26 million GDP contribution and 754 jobs across the province. The significant difference between output and provincial GDP contribution is due mainly to the importation of performing arts which generates significantly less GDP in New Brunswick compared to locally developed content.

Adjusted for size, only PEI generated less GDP from performing arts among the 10 provinces, and the sector's GDP contribution has been declining in recent years. According to Statistics Canada, New Brunswick is the only province where the performing arts sector GDP declined between 2010 and 2017.

To reach the national level of performing arts output (adjusted for population size), New Brunswick would need an annual boost of \$66 million. The larger provinces generate far more performing arts revenue compared to smaller provinces, but even compared to Nova Scotia, New Brunswick would need to see a \$26.2 million boost to generate the same level of performing arts revenue (adjusted for population size). Saskatchewan generates \$30 million more and Manitoba \$56 million more.

1.4 SUBSECTOR: VISUAL AND APPLIED ARTS

The visual and applied arts subsector generated \$97 million worth of output in New Brunswick in 2017. Crafts accounted for \$26 million of that total, followed by design (\$23 million), architecture (\$17 million), advertising (\$15 million), and photography (\$14 million). The subsector's GDP contribution dropped sharply between 2010 and 2017, due mainly to a steep decline in both crafts and design. Statistics Canada does not elaborate on the reasons why these two subsectors have declined.

Table 8: **PERFORMING ARTS ECONOMIC CONTRIBUTION, NEW BRUNSWICK (2017)**

Output (\$M)	\$48 million
GDP (\$M)	\$26 million
GDP per capita	\$33
GDP % change (2010-2017)	-24%
Jobs	754

Source: Statistics Canada Table 36-10-0452-01.

Table 9: **VISUAL AND APPLIED ARTS ECONOMIC CONTRIBUTION, NEW BRUNSWICK (2017)**

Output (\$M)	\$97 million
GDP (\$M)	\$54 million
GDP per capita	\$70
GDP % change (2010-2017)	-59%
Jobs	1,130

Source: Statistics Canada Table 36-10-0452-01.

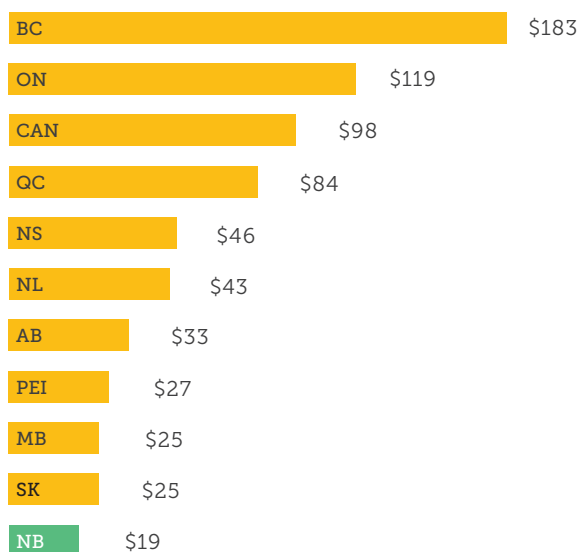


1.5 SUBSECTOR: FILM AND VIDEO

Film and video production is a significant industry across Canada, generating \$11 billion worth of output in 2017 and directly employing more than 66,000 workers. It is not a major industry in New Brunswick though, as it generates only about \$31.5 million worth of output (0.3 percent of national output) and only \$14.2 million worth of provincial GDP. **The gap between output and provincial GDP indicates considerable leakage of economic activity to other jurisdictions.** This leakage can occur when actors are brought in from elsewhere or when local producers hire suppliers in other provinces.

As shown in Figure 4, British Columbia and Ontario generate the bulk of economic value in the film and media sector.

FIG. 4: FILM AND VIDEO GDP Per capita (2017), BY PROVINCE



Source: Statistics Canada Table 36-10-0452-01

Table 10: FILM AND VIDEO SUB-ECONOMIC CONTRIBUTION, NEW BRUNSWICK (2017)

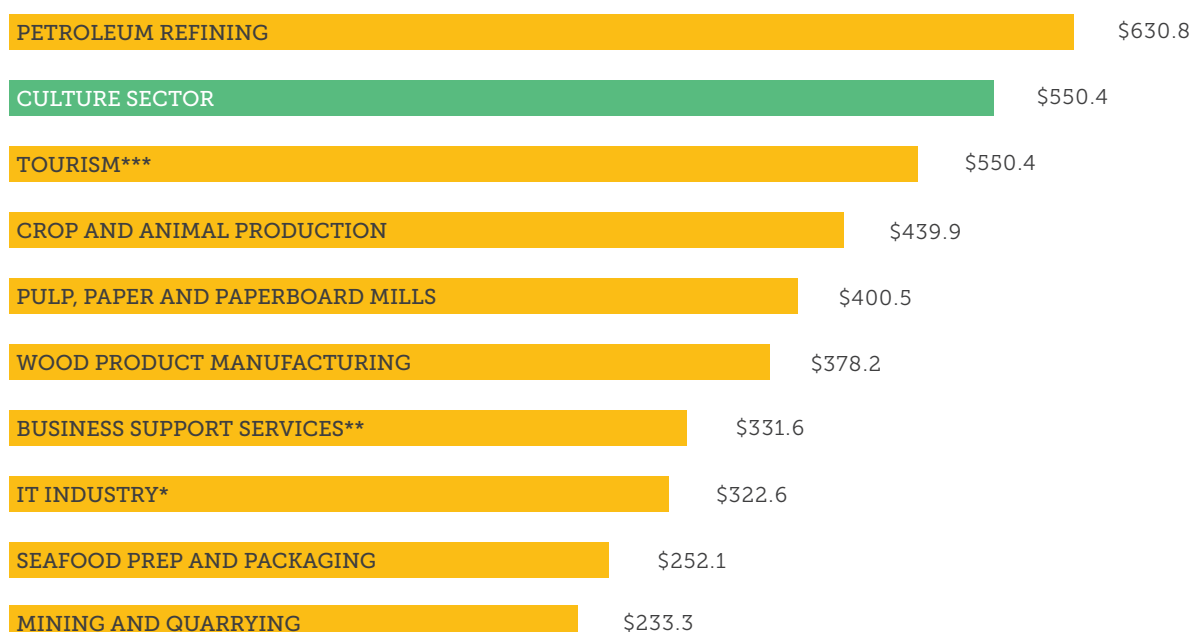
Output (\$M)	\$31.5 million
GDP (\$M)	\$14.2 million
GDP per capita	\$19
GDP % change (2010-2017)	-6%
Jobs	220

Source: Statistics Canada Table 36-10-0452-01.

1.6 RELATIVE ECONOMIC IMPORTANCE OF THE CULTURE SECTOR

Culture industries such as performing arts, written and published works, visual arts, and heritage provide value well beyond their economic contribution. However it is important to understand just how important the contribution of culture is to the province's economy. It creates jobs, consumer spending, and tax revenue across the province. As shown in Figure 5, the culture sector (culture industries) contributed \$550 million worth of provincial GDP in 2017, well above other important sectors such as wood product manufacturing, information technology (IT), and seafood production. **The culture sector contributed more GDP than the entire tourism sector (although there is some overlap between the two sectors).**

Fig. 5: PROVINCIAL GDP CONTRIBUTION BY SELECTED INDUSTRIES, (MILLIONS) (2017)



For 2017 except where noted.

*Using Statistics Canada's definition of information and communications technologies (ICT), excluding telecommunications.

**Some of New Brunswick's BSS activity is classified in other sectors such as insurance.

***The most recent data on tourism-related GDP is from 2014.

Source: Statistics Canada

1.7 TRADE IN CULTURAL PRODUCTS AND SERVICES

Because of its small size, New Brunswick imports a considerable amount of cultural products and services. In 2015, the value of these imports exceeded \$808 million. This included sports events; live performances of national or international artists; books, periodicals, and music; as well as visual and applied arts. These imports came from both other provinces and other countries.

At the same time, New Brunswick also exports cultural products and services. If a New Brunswick author's book sells outside the province, it represents a cultural export. If a performing arts organization tours outside the province, that is also a cultural export. If a New Brunswick visual artist or craft producer sells products to residents outside New Brunswick (even if they purchase the product while visiting New Brunswick) that is also measured as a cultural export. In 2015 the total value of cultural exports amounted to \$233 million. That resulted in a cultural trade deficit of \$575 million.

This means that **New Brunswick exported only 29 cents worth of products and services for every dollar of imported cultural products and services.**

Table 11 shows New Brunswick's cultural trade balance for several subsectors. In the performing arts sector, New Brunswick has the second largest trade gap, the province imported \$31 million worth of activity in 2015 and exported only \$8 million, for a negative balance of \$23 million. The large visual and applied arts trade deficit is the result of crafts (\$85 million deficit), advertising (\$29 million deficit) and design (\$64 million deficit). New Brunswick companies and individuals purchased \$74 million worth of design services (graphic design, interior design, etc.) in 2015, but New Brunswick firms only exported \$10.3 million. Under audio-visual and interactive media, the broadcasting sector is the main contributor to the trade deficit. New Brunswick imported \$146 million worth of broadcasting activity, while exported only \$20 million.

Figure 6 (p. 16) shows the cultural trade balance (exports per dollar of imports) in New Brunswick for several selected subsectors.

Table 11: CULTURAL TRADE BALANCE, NEW BRUNSWICK, DETAILED SUBSECTORS (\$000S)

CULTURE, SUBSECTOR	IMPORTS	EXPORTS	BALANCE	EXPORTS PER \$ OF IMPORTS
Culture, total	\$808.3	\$233.5	-\$575	\$0.29
Heritage and libraries	5.5	3.9	-2	\$0.71
Live performance	33.3	8.7	-25	\$0.26
Performing arts	31.1	7.9	-23	\$0.25
Visual and applied arts	259.4	68.8	-191	\$0.27
Written and published works	154.5	75.3	-79	\$0.49
Audio-visual and interactive media	258.3	46.4	-212	\$0.18
Sound recording	22.2	0.8	-21	\$0.04
Education and training (culture)	9.5	6.6	-3	\$0.69
Governance, funding and professional support (culture)	37.9	14.6	-23	\$0.39

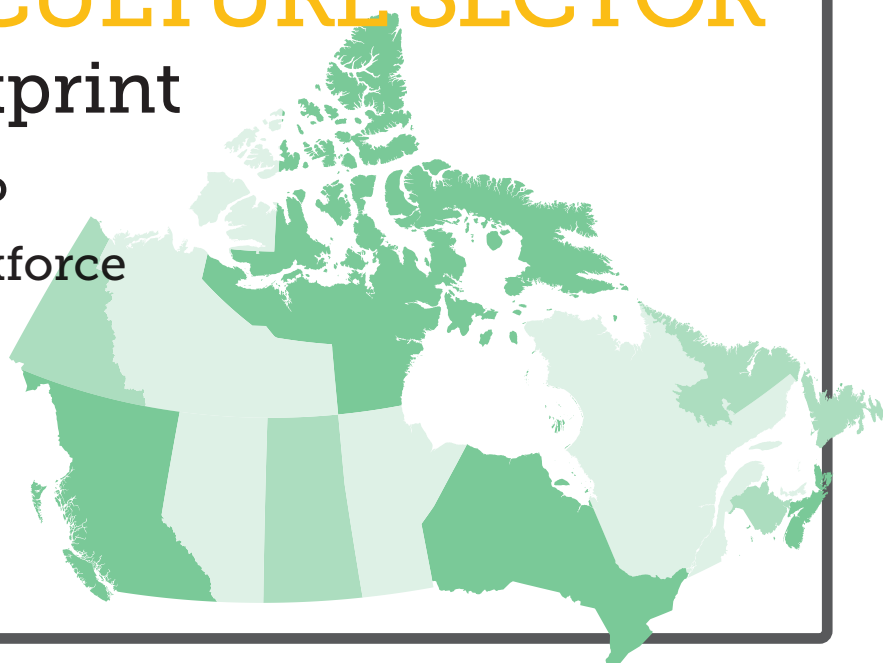
For 2015. Inter-provincial and international exports. Source: Statistics Canada Tables 36-10-0452-01,12-10-0116-01.

CANADA'S CULTURE SECTOR

economic footprint

\$59.7 billion in GDP
from 3.6% of the workforce

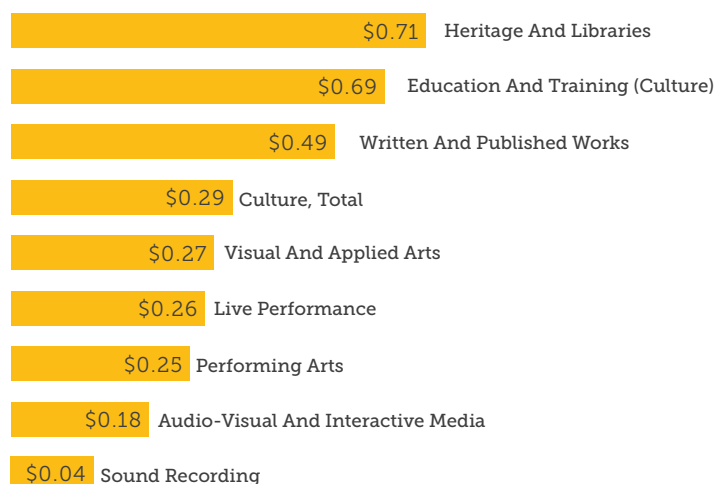
Supporting over
784,500 jobs



Again, the province's size is one of the main reasons for its cultural trade deficit. This deficit is felt elsewhere in Canada as well. As shown in Figure 7, Ontario is the only province out of the 10 that has a cultural trade surplus, – exporting \$1.20 for every \$1.00 worth of imports.

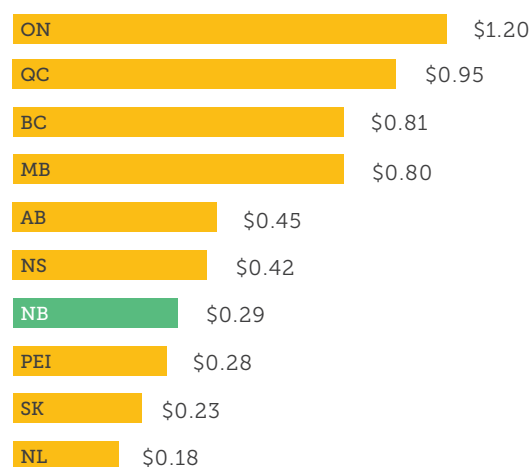
However, it should be noted that New Brunswick's cultural trade deficit is considerably larger than both Nova Scotia and Manitoba, two provinces with comparable populations.

FIG. 6: THE VALUE OF CULTURAL EXPORTS PER \$1.00 OF CULTURAL IMPORTS, NEW BRUNSWICK



For 2015. Inter-provincial and international exports.
Source: Statistics Canada Tables 36-10-0452-01 & 12-10-0116-01.

FIG. 7: CULTURAL TRADE BALANCE, BY PROVINCE, THE VALUE OF CULTURAL EXPORTS PER \$1.00 OF CULTURAL IMPORTS



For 2015. Inter-provincial and international exports.
Source: Statistics Canada Tables 36-10-0452-01, 12-10-0116-01.

1.8 SIZE OF ORGANIZATIONS AND FIRMS IN THE CULTURE SECTOR

One of the characteristics of New Brunswick's culture sector is a lack of anchor organizations (over 50 employees). Larger organizations tend to have more potential to invest in innovation, develop export markets, and access a broader array of funding sources. Most of the firms and organizations in the province's culture industries are very small, with fewer than five employees. The sector could achieve greater vitality with an investment in capacity building.

Across Canada, there are 174 arts and culture related establishments with 50 or more employees. This includes performing arts, museums, galleries, theatres, and other entities (excluding historic and heritage sites). No single firm or organization in New Brunswick's culture sector has 50 or more employees.

In fact, New Brunswick is the only province in Canada without a single establishment in the culture sector employing 50 or more workers. Nova Scotia and Manitoba, provinces with similar populations, have 6 and 8 respectively. Table 12 shows the share of total culture sector employment accounted for by larger firms and organizations (those with 50+ workers).

Table 12: NUMBER OF ARTS AND CULTURE-RELATED ESTABLISHMENTS WITH 50 OR MORE EMPLOYEES

JURISDICTION	NUMBER OF ORGANIZATIONS	SHARE OF THE NATIONAL TOTAL
Canada	174	
Newfoundland and Labrador	2	1%
Prince Edward Island	1	1%
Nova Scotia	6	3%
New Brunswick	0	0%
Quebec	61	35%
Ontario	51	29%
Manitoba	8	5%
Saskatchewan	5	3%
Alberta	18	10%
British Columbia	22	13%

Excluding historic and heritage sites. Includes performing arts companies, theatres, museums and galleries as well as independent artists, writers and actors. Source: Statistics Canada (December 2018).

According to Statistics Canada, across all industries, firms with more than 100 employees generate 80 percent of all international export revenue. Healthy and competitive industries almost always have a large number of smaller firms but almost every industry has a small number of larger firms that set the pace for the sector.

There is a strong correlation between the provinces with a high share of employment in larger culture organizations and the province's per capita GDP contribution from culture. Those provinces with the highest GDP contribution tend to have more cultural firms and organizations with 50 or more employees.

The negative impacts of not having arts and cultural 'champions' at scale are considered in Section 4.

1.9 GOVERNMENT SUPPORT FOR ARTS AND CULTURE

Statistics Canada has not published comprehensive information on government support for the culture sector since 2010. Other more recent data sources show the level of government financial support for specific subsectors within the culture sector.

Table 13 shows the level of government support for the performing arts sector as well as for not-for-profit heritage institutions, museums, and art galleries. Combined public sector support for the performing arts sector in New Brunswick ranks last among the 10 provinces, adjusted for population size. Governmental support for other culture sectors also ranks below average compared to other provinces.

The Canada Council for the Arts is the main source of federal government funding for both institutions and individual artists. For the year 2017-2018, New Brunswick artists and organizations received \$2.6 million from the Canada Council. Adjusted for population size, this measures 40 percent below the national funding level. The province ranked 9th among the 10 provinces for the total amount of funding per capita. The amount awarded to individual artists was 53 percent below the national level. On a per capita basis, individual artists in British Columbia received 2.9 times more funding than their peers in New Brunswick.

FIG. 8: PERCENTAGE SHARE OF TOTAL CULTURE SECTOR EMPLOYMENT* FROM FIRMS AND ORGANIZATIONS WITH 50+ EMPLOYEES



*Excludes historic and heritage sites. Includes performing arts companies, theatres, museums and galleries as well as independent artists, writers and actors. Source: Statistics Canada (December 2018).

Table 13: CULTURAL TRADE BALANCE, NEW BRUNSWICK, DETAILED SUBSECTORS (\$000S)

	FEDERAL GOV.	PROV. GOV.	LOCAL GOV.	TOTAL	NB RANK:
Performing arts	\$1.07	\$1.67	\$0.37	\$3.11	10th
Not-for-profit heritage site	\$2.06	\$15.19	\$7.06	\$24.31	7th
Not-for-profit museums	\$0.76	\$5.74	\$1.46	\$7.96	9th
Not-for-profit art galleries	\$0.52	\$1.25	\$0.36	\$2.13	6th

Source: Statistics Canada Table 21-10-0189-01 and Government of Canada Survey of Heritage Institutions (2017).

Table 14: Per capita CANADA COUNCIL FOR THE ARTS FUNDING, 2017-2018

JURISDICTION	TOTAL FUNDING	INDIVIDUALS	GROUPS AND ORGANIZATIONS
Canada	\$5.66	\$1.11	\$4.56
Quebec	\$8.26	\$1.52	\$6.74
British Columbia	\$6.51	\$1.35	\$5.16
Manitoba	\$6.07	\$0.98	\$5.10
Nova Scotia	\$6.07	\$1.02	\$5.05
Prince Edward Island	\$5.19	\$0.22	\$4.97
Newfoundland and Labrador	\$4.96	\$1.20	\$3.75
Ontario	\$4.74	\$0.93	\$3.81
Saskatchewan	\$3.62	\$0.43	\$3.19
New Brunswick	\$3.38	\$0.52	\$2.86
Alberta	\$2.64	\$0.51	\$2.13

Source: Canada Council for the Arts, 2017-2018 year.

2. ARTS AND CULTURE WORKFORCE

This section provides an overview of the arts and culture workforce using data from Statistics Canada's 2016 Census. It looks at a wide variety of factors including employment by detailed occupation and industry, income, education, migration, immigration.

The 2016 census is the best source of data providing detailed insight into the arts and culture workforce is the. At the time of the census 6,220 individuals were in the culture workforce in New Brunswick. For classification purposes, a person is said to be in the arts and culture workforce if at least half of their income comes from their "cultural occupation". It is important to note that for many artists in New Brunswick, their art is not their primary source of employment income. During the census, people are only classified by their primary occupation. As a result, a person who is a history teacher and a sculptor will likely be classified as a teacher and not an artist.

Despite this limitation, the census remains a good source of data on the workforce as it allows for comparison between provinces and urban centres on a variety of workforce-related metrics.

6,220 individuals work in the arts and culture workforce.

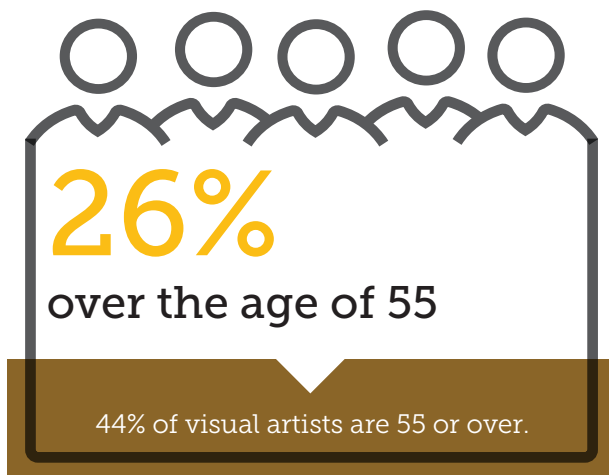
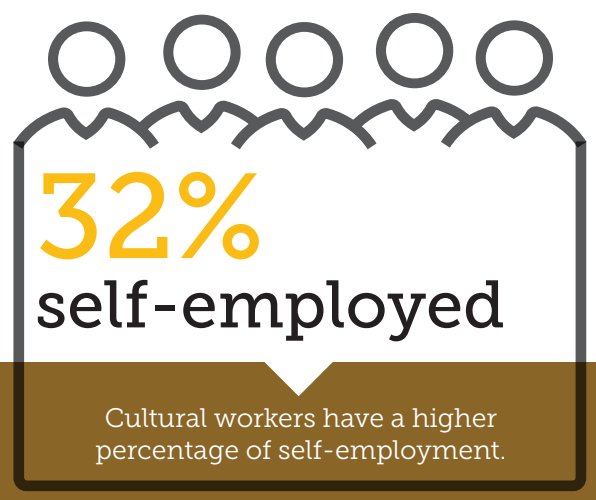
New Brunswick has a lower concentration of workers in most arts and culture-related occupations than the country overall. The province has a higher concentration of workers in technical occupations related to museums and galleries, announcers and other broadcasters, artisans and craftspersons, and translators.

Between the 2006 and 2016 census, there was a significant increase in the number of people working as translators, creative and performing artists, photographers, and graphic arts technicians, but an overall 4 percent decline in arts and culture employment compared to a 15 percent rise across the country.

Thirty-two percent of arts and culture workers are self-employed in New Brunswick compared to only 8 percent of all workers. Over 70 percent of visual artists are self-employed.

The arts and culture workforce is aging.

26 percent were over the age of 55 at the time of the 2016 census. Nearly half of those working as visual artists were over 55, as were 44 percent of translators.



14 percent of the arts and culture workforce holds down two or more jobs at the same time, compared to only 5 percent across all occupations.

10 percent of those working in the arts and culture sector in 2016 lived outside the province in 2011. This was an above average inward migration rate.

9 percent of all New Brunswick's arts and culture workers are immigrants (new Canadians), nearly double the rate of the workforce overall.

There are an above average number of women working as librarians, interior designers, dancers, editors, translators, and creative designers; and a much lower number of women in video camera operators, producers, broadcasters, journalists, and actors.

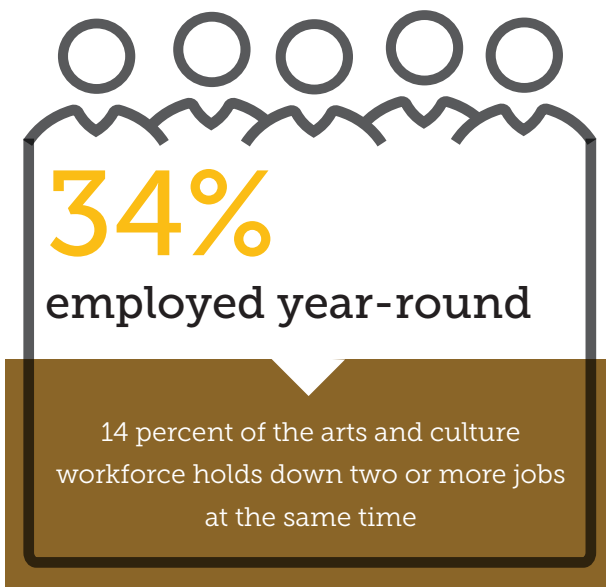
People who speak French as their first language are much more concentrated in a few occupations, including translators, graphic arts technicians, library technicians, producers, and interior designers.

Only 34 percent of the arts and culture workforce is employed full-time year-round.

The median employment income for all arts and culture workers is 59 percent below the provincial median for all workers. For those working full-time, year-round, the income gap drops to 16 percent.

Thirteen percent of the arts and culture workforce in New Brunswick is classified as low income — less than the workforce overall (16 percent).

The arts and culture workforce is much more educated than the general public with 39 percent holding a university degree and 11 percent a master's degree or higher.



THE ARTS AND CULTURE SECTOR ATTRACTS NEWCOMERS.



2.1 THE ARTS AND CULTURE WORKFORCE: CONCENTRATION OF WORKERS

There were 6,220 people active in the arts and culture workforce in 2016. They worked as managers in the sector as well as in professional and technical occupations (See Appendix A for a detailed list of the occupations included in the arts and culture workforce). There are 750 employed as graphic designers and illustrators and 565 employed as musicians and singers. 420 people earned their primary income as translators, terminologists, and interpreters and 385 as artisans or craftspersons. Table 15 shows the number of people employed in all detailed occupational groups.

The table also shows how employment in New Brunswick compares to the national workforce. An employment index number greater than 1.00 means there are more people employed in New Brunswick in the occupation than the national workforce, as a share of total employment. For example, there are 750 employed as graphic designers and illustrators, but that is 46 percent below the national average number of workers in that occupational group (employment index of 0.54). In fact, there are only five occupations for which New Brunswick has as many or more employed than the national workforce. They are technical occupations related to museums and art galleries (employment index = 1.46), announcers and other broadcasters (1.08), artisans and craftspersons (1.07), translators, terminologists, and interpreters (1.02); and conservators and curators (1.00).

For most arts and cultural occupations, New Brunswick has fewer employees than the country overall. There are 26 percent fewer journalists (employment index = 0.74), 36 percent fewer dancers (employment index = 0.64) and 74 percent fewer actors and comedians (Employment Index = 0.26).



Table 15: NEW BRUNSWICK'S ARTS AND CULTURE WORKFORCE BY DETAILED OCCUPATION (2016)

OCCUPATION	EMPLOYMENT	EMPLOYMENT INDEX (CAN = 1.00)*
5212 Technical occupations related to museums and art galleries	275	1.46
5231 Announcers and other broadcasters	145	1.08
5244 Artisans and craftspersons	385	1.07
5125 Translators, terminologists and interpreters	420	1.02
5112 Conservators and curators	45	1.00
5113 Archivists	40	0.94
051 Managers in art, culture, recreation, and sport	510	0.92
5111 Librarians	175	0.86
5132 Conductors, composers and arrangers	80	0.85
5221 Photographers	325	0.75
5123 Journalists	200	0.74
5211 Library and public archive technicians	150	0.70
5133 Musicians and singers	565	0.68
5134 Dancers	155	0.64
5136 Painters, sculptors and other visual artists	305	0.59
5222 Film and video camera operators	70	0.59
5121 Authors and writers	370	0.57
5241 Graphic designers and illustrators	750	0.54
5122 Editors	200	0.50
5223 Graphic arts technicians	80	0.40
5232 Other performers, n.e.c.	65	0.37
5131 Producers, directors, choreographers and related occupations	225	0.37
5225 Audio and video recording technicians	110	0.37
5242 Interior designers and interior decorators	200	0.34
5227 Support occupations in motion pictures, broadcasting and performing arts	80	0.33
5224 Broadcast technicians	15	0.32
5226 Other technical occs. in motion pictures, broadcasting and performing arts	100	0.30
5135 Actors and comedians	85	0.26
5243 Theatre, fashion, exhibit and other creative designers	75	0.22

*The employment index shows how employment in New Brunswick compares to the level across the country. A number above 1.00 means more employed as a share of the total workforce than the country overall.

Source: Statistics Canada 2016 Census.

Within New Brunswick, the largest number of arts and culture workers is in the Moncton region (Census Metropolitan Area) followed by Fredericton and Saint John. Adjusted for size, the Fredericton region has the highest concentration of workers, with 22 of every 1000 employed in arts and culture occupations. Additional analysis of New Brunswick's three large urban centres is found in Section 2.14.

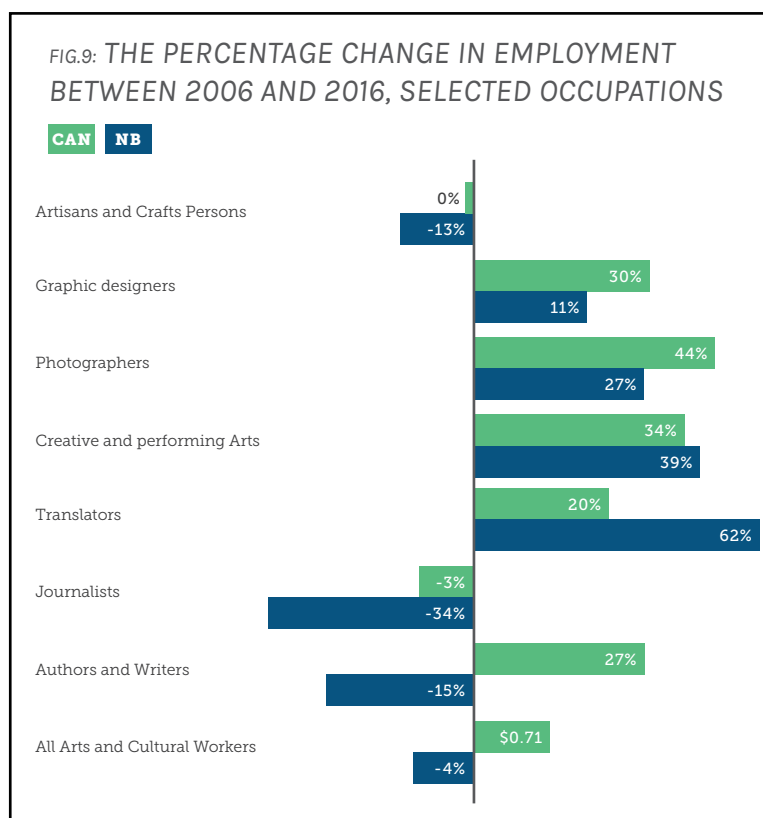
Table 16: NB'S ARTS AND CULTURE WORKFORCE BY URBAN CENTRE

JURISDICTION	ARTS AND CULTURE WORKFORCE	PER 1,000 IN THE OVERALL WORKFORCE:
New Brunswick	6,220	15
Moncton CMA	1,610	19
Saint John CMA	1,120	16
Fredericton CA	1,325	22
Bathurst CA	165	10
Miramichi CA	135	9
Campbellton CA	60	9
Edmundston CA	150	12
Rest of New Brunswick	1,655	11

2.2 THE CHANGING PROFILE OF THE ARTS AND CULTURE WORKFORCE IN NEW BRUNSWICK

The number of people working in arts and culture occupations in New Brunswick declined slightly between 2006 and 2016 while the number rose across Canada. As shown in table 17, there were 6,465 employed in related occupations in 2006 versus 6,220 in 2016, a decline of 4 percent. Across Canada, the total employed rose by 15 percent.

The number of managers in the arts and culture sector also declined slightly over the decade while rising across Canada. The number working as librarians and related occupations also declined but the pattern was similar across the country. The number of authors and writers dropped by 15 percent in New Brunswick, but increased strongly across Canada (up 27 percent). Figure 9 shows the percentage change in employment over the decade by selected occupations.



[For 2015. Inter-provincial and international exports.]
Source: Statistics Canada Tables 36-10-0452-01 & 12-10-0116-01.

There was strong growth in the number of New Brunswickers employed as translators, terminologists, and interpreters but this occupational group is much older than average. The number of creative and performing artists rose over the decade by 400; a significant increase of 39 percent. The number of graphic designers and illustrators working in New Brunswick also increased in 2016 but the growth rate (11 percent) was well below the growth rate across the country (+30 percent). The number of artisans and craftspersons also declined over the decade.

Table 17: NEW BRUNSWICK'S ARTS AND CULTURE WORKFORCE IN 2006 COMPARED TO 2016, SELECTED OCCUPATIONS

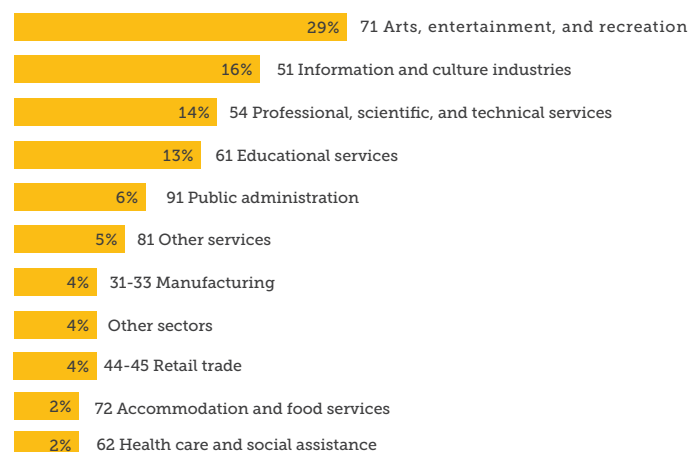
OCCUPATION	2006	2016	# CHANGE	%CHANGE	CAN % CHANGE
All arts and culture occupations	6,465	6,220	-245	-4%	+15%
Managers in art, culture, recreation, and sport	530	510	-20	-4%	+12%
Librarians, archivists, conservators and curators	320	265	-55	-17%	-16%
Authors and writers	435	370	-65	-15%	+27%
Journalists	305	200	-105	-34%	-3%
Translators, terminologists, and interpreters	260	420	160	+62%	+20%
Creative and performing artists	1,020	1,420	400	+39%	+34%
Technical occupations in libraries, archives, museums, and art galleries	645	430	-215	-33%	-15%
Photographers, graphic arts technicians and technical and co-ordinating occupations in motion pictures, broadcasting, and the performing arts	620	785	165	+27%	+44%
Graphic designers and illustrators	675	750	75	+11%	+30%
Artisans and craftspersons	440	385	-55	-13%	0%

Source: Statistics Canada 2016 and 2006 Census.

2.3 IN WHICH INDUSTRIES ARE CULTURE WORKERS AND ARTISTS EMPLOYED?

The arts and culture workforce in New Brunswick is distributed among many different sectors of the economy. The majority of workers are clustered in three main industries as shown in Figure 10: arts and entertainment (29 percent of the total); information and culture industries (16 percent); and professional services (14 percent). The education sector employs 13 percent of the arts and culture workforce. Journalists are mostly employed in information and culture industries, which includes publishing. However, graphic designers can be found in most sectors of the economy. The creative arts-related occupations are mostly clustered in the arts, entertainment, and recreation sector.

FIG. 10: SHARE OF THE TOTAL ARTS AND CULTURE WORKFORCE BY INDUSTRY OF EMPLOYMENT (2016)



[For 2015. Inter-provincial and international exports.]
Source: Statistics Canada Tables 36-10-0452-01 & 12-10-0116-01.

2.4 GENDER PROFILE IN THE ARTS AND CULTURE WORKFORCE

Women make up 48 percent of the total workforce in New Brunswick (2016), which is similar to the country overall. Among the arts and culture workforce, though women make up a higher proportion with 56 percent of the total compared to 54 percent across Canada. This varies by occupation though. Women make up 49 percent of managers in arts and culture. The vast majority of people working in the library system are female as they represent 79 percent of librarians and 87 percent of library and public archive technicians. Women also make up 83 percent of interior designers and interior decorators, 79 percent of dancers, and 76 percent of translators and interpreters. 67 percent of broadcast technicians are female.

On the flip side, women are less represented as film and video camera operators (only 14 are female in New Brunswick). There are also far fewer working as producers, directors, choreographers (18 percent of the total), audiovisual recording technicians (20 percent), and as announcers and broadcasters (30 percent).

Fifty-five percent of painters, sculptors, and other visual artists are female, as are 51 percent of photographers.

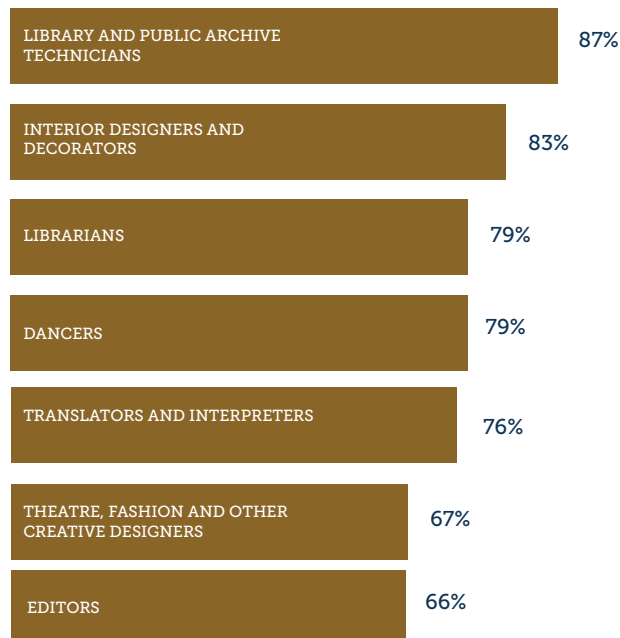
This gender split is similar to the arts and culture workforce across Canada. However, there are a few exceptions. For example, across Canada, only 19 percent of broadcast technicians are female compared to 67 percent in New Brunswick. Among those working in support occupations in motion pictures, broadcasting, photography, and the performing arts, women account for 46 percent of the total in New Brunswick and only 31 percent across the country.

At the time of the 2016 Census, Statistics Canada did not provide other options for gender identification.

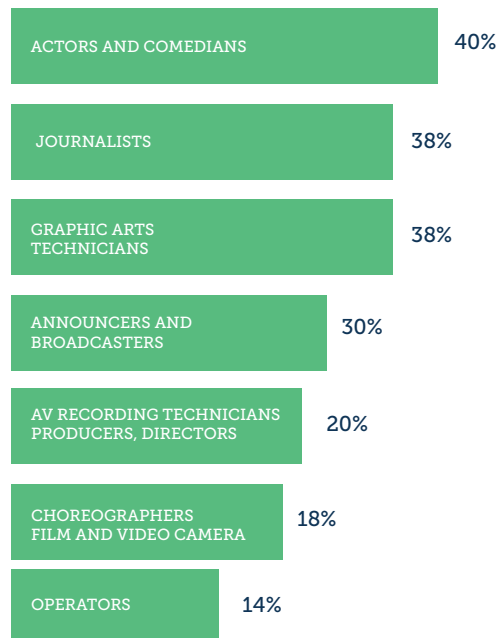


FIG. 11: WOMAN AS A SHARE OF THE TOTAL WORKFORCE, SELECTED OCCUPATIONS (2016)

Occupations with much higher female participation (% of total workers)



Occupations with much lower female participation (% of total workers)

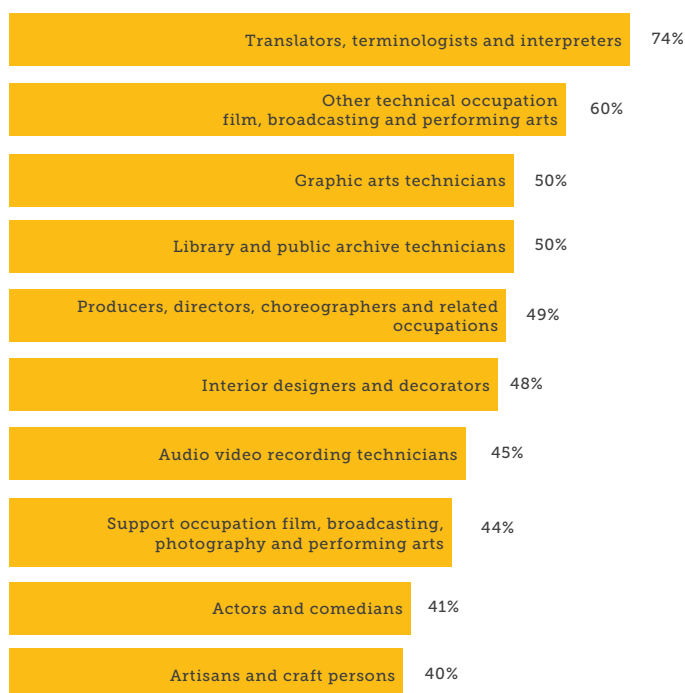


Source: Statistics Canada 2016 Census.

2.5 LANGUAGE

The overall New Brunswick workforce and the arts and culture subsector report similar rates of workers with French as their first language. Across all occupations, 32 percent of workers speak French as their first official language compared to 31 percent of people employed in arts and culture-related occupations. There are a few specific occupational groups for which the Francophone population has a much higher concentration of workers: nearly three out of four employed in language industries (translators, etc.) , as well as half of all librarians, speak French as their first official language.

FIG. 12: SHARE OF THE TOTAL ARTS AND CULTURE WORKFORCE BY SELECTED OCCUPATION WITH FRENCH AS THEIR FIRST LANGUAGE (2016)



For 2015. Inter-provincial and international exports.
Source: Statistics Canada Tables 36-10-0452-01 & 12-10-0116-01.

2.6 WORK DURING THE YEAR

The arts and culture workforce experiences greater volatility in employment during the year than many other sectors of the economy. As shown in Table 18, among all occupations in art, culture, recreation, and sport, only 34 percent work full-time and year-round. The rest either work part-time, seasonally, or a combination of both. Librarians, creative designers, and craftspersons are more likely to work full-time and year-round but every other occupational group is below average. This is not unique to New Brunswick's arts and cultural workforce. Across the country, there is a greater share of workers employed on a part-time or seasonal basis.

2.7 INCOME REVIEW

For most occupations related to arts and culture, income levels are below both median and average employment income. Table 19 shows the median and average employment income for selected occupations compared to the median and average employment income for all workers across the economy. Median is the income level at which half of all workers are above and below whereas average represents the total income of all workers divided by the total number of workers. When the average income is well above the median it means more people are earning well above the median and vice versa.

Table 18: PERCENTAGE OF THE WORKFORCE EMPLOYED FULL-TIME, YEAR ROUND

ALL OCCUPATIONS ACROSS ALL SECTORS	51%
5 Occupations in art, culture, recreation, and sport	34%
51 Professional occupations in arts and culture	41%
511 Librarians, archivists, conservators and curators	71%
512 Writing, translating and related communications professionals	46%
513 Creative and performing artists	30%
52 Technical occupations in art, culture, recreation, and sport	30%
521 Technical occupations in libraries, public archives, museums and art galleries	17%
522 Photographers, graphic arts technicians and technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts	38%
523 Announcers and other performers, n.e.c.	49%
524 Creative designers and craftspersons	54%

Source: Statistics Canada 2016 Census.

Table 19: MEDIAN AND AVERAGE EMPLOYMENT INCOME, ALL WORKERS

OCCUPATION	Median employment income (\$)	Compared to all workers	Avg. employment income (\$)	Compared to all workers
5 Occupations in art, culture, recreation, and sport	\$12,984	-59%	\$22,799	-43%
51 Professional occupations in arts and culture	\$21,303	-33%	\$30,630	-24%
511 Librarians, archivists, conservators and curators	\$53,260	+67%	\$52,512	+31%
512 Writing, translating and related communications professionals	\$33,301	+5%	\$36,963	-8%
513 Creative and performing artists	\$12,236	-62%	\$20,670	-48%
52 Technical occupations in art, culture, recreation, and sport	\$10,282	-68%	\$18,588	-54%
521 Technical occupations in libraries, archives, museums and galleries	\$12,178	-62%	\$17,779	-56%
522 Photographers, graphic arts and technical occupations in film broadcasting and performing arts	\$20,419	-36%	\$24,541	-39%
523 Announcers and other performers, n.e.c.	\$30,590	-4%	\$28,342	-29%
524 Creative designers and craftspersons	\$25,030	-21%	\$26,556	-34%

Source: Statistics Canada 2016 and 2006 Census.

In 2016, the median annual employment income for those working in art, culture, recreation, and sport occupations was only \$12,984, 59 percent below the median for all workers. The average employment income was \$22,799, 43 percent below when compared to all workers. As shown in table 19, the only occupational groups with a higher median employment income were librarians and writing and translating related occupations.

A large part of this income differential is related to the higher number of part-time and seasonal workers. Table 20 shows the median and average employment incomes for those working full-time and year-round in that total. The median employment income for those working in art, culture, recreation, and sport is only 16 percent below the median for all workers across the provincial economy. The average employment income, though, is still 23 percent less than the average for all workers.

Table 20: MEDIAN AND AVERAGE EMPLOYMENT INCOME, FULL-TIME/YEAR-ROUND WORKERS

OCCUPATION	Median employment income (\$)	Compared to all workers	Average employment income (\$)	Compared to all workers
5 Occupations in art, culture, recreation, and sport	\$38,712	-16%	\$ 41,562	-23%
51 Professional occupations in arts and culture	\$47,712	+3%	\$ 48,083	-11%
511 Librarians, archivists, conservators and curators	\$56,147	+21%	\$ 58,739	+9%
512 Writing, translating and related communications professionals	\$52,201	+13%	\$ 52,824	-2%
513 Creative and performing artists	\$33,186	-28%	\$ 36,673	-32%
52 Technical occupations in art, culture, recreation, and sport	\$36,091	-22%	\$ 36,698	-32%
521 Technical occupations in libraries, archives, museums and galleries	\$38,186	-18%	\$ 40,829	-24%
522 Photographers, graphic arts and technical occupations in film broadcasting and performing arts	\$37,637	-19%	\$ 38,817	-28%
523 Announcers and other performers, n.e.c.	\$35,850	-23%	\$ 39,095	-28%
524 Creative designers and craftspersons	\$36,082	-22%	\$ 36,444	-33%

Source: Statistics Canada 2016 and 2006 Census.

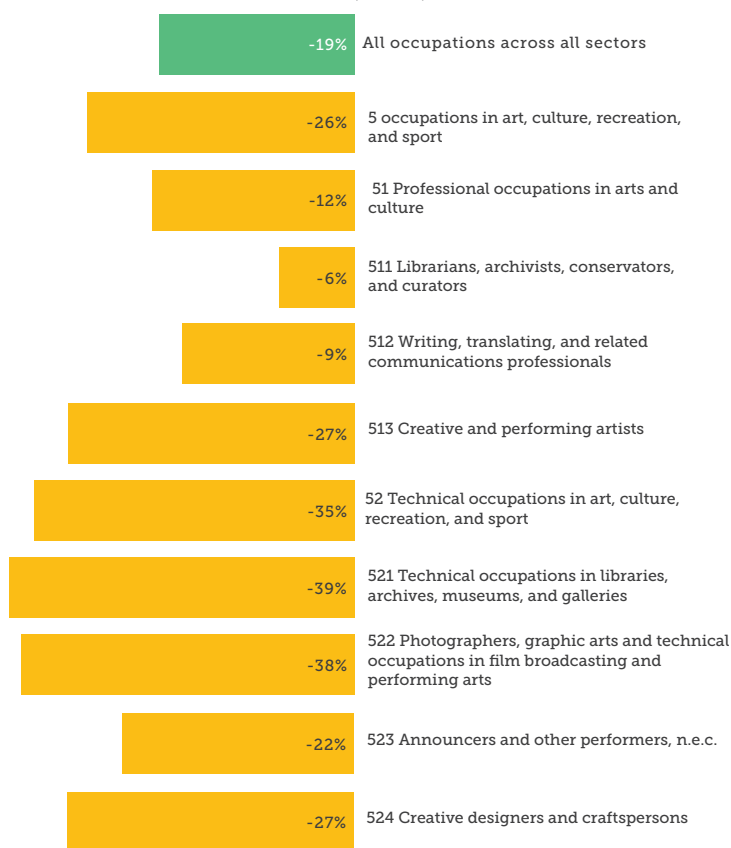
When compared to the rest of Canada there is a fairly wide variation in wage levels within the occupational groups. Figure 13 shows the average employment income gap between New Brunswick and Canada. Across all occupations in all industries, New Brunswickers earned 19 percent less than the average person across the country, in 2016. For occupations related to art, culture, recreation, and sport, New Brunswickers earned 26 percent below the national average. However, librarians and writing-related professionals have less of an income gap.

2.7.1 LOW INCOME

Statistics Canada publishes data on the share of workers in various occupations who earn income below the poverty line, the low-income measure, after-tax (LIM-AT). At the time of the census, 12.8 percent of all workers in occupations related to art, culture, recreation, and sport were living below the poverty line. This was below the rate of 16.1 percent across all workers. Across Canada, 13.8 percent of workers in occupations related to art, culture, recreation, and sport were living below the poverty line, slightly higher than in New Brunswick.

Additional insight into income based on the survey of artists can be found in Section 3 below.

FIG. 13: AVERAGE ANNUAL EMPLOYMENT INCOME VARIANCE NEW BRUNSWICK VERSUS CANADA, SELECTED OCCUPATIONS (2016)



*includes public archives, museums and art galleries.

**includes technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts.

Source: Statistics Canada 2016 Census.

2.8 MIGRATION AND THE ARTS AND CULTURE WORKFORCE

The census provides insight into who is moving into the province. In 2016, only 6 percent of the overall workforce in New Brunswick lived outside of New Brunswick. For those employed in professional or technical occupations related to arts and culture, 10 percent lived in another province or country. This was higher than the national migration rate of 8 percent. Nova Scotia and Prince Edward Island also had strong inward migration, which suggests that people are moving for jobs in arts and culture.

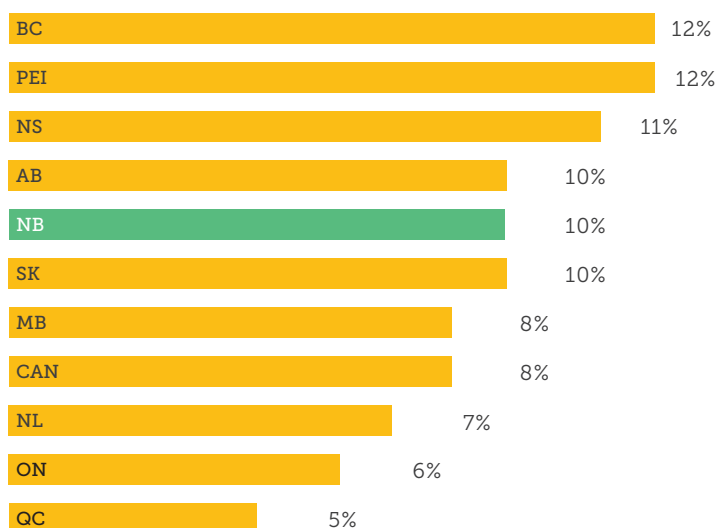
The 810 arts and culture workers who were newly living in New Brunswick in 2016 were mostly young: 74 percent were under the age of 44.

2.9 AGE OF THE WORKFORCE

The aging workforce is an emerging challenge in all New Brunswick industries. Many industries are struggling to find workers as more are retiring and there are not enough young people coming up to take their place. The arts and culture workforce is facing a similar challenge. Across all occupations, at the time of the census, 25 percent of workers were over the age of 55. For arts and culture occupations, 26 percent were over the age of 55.

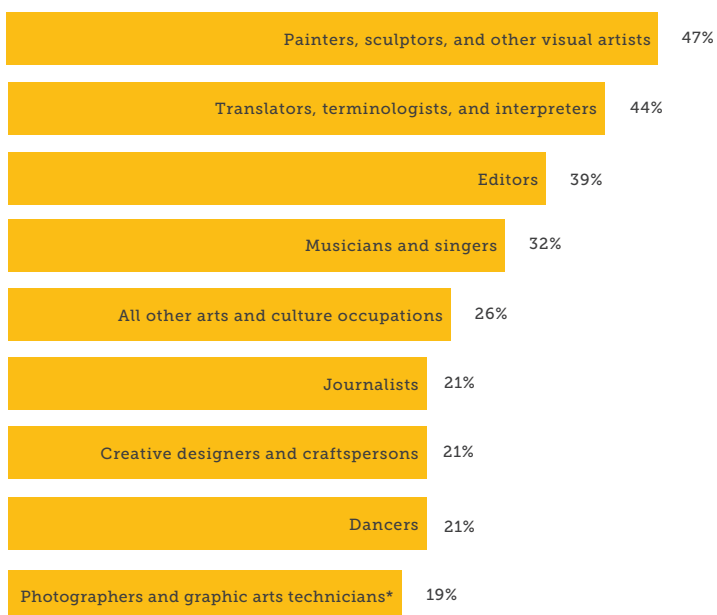
Figure 15 shows the share of the workforce over the age of 55 for selected arts and culture related occupations in New Brunswick. Nearly half of those working as painters, sculptors, and other visual artists were over the age of 55, as are 44 percent of translators, terminologists, and interpreters. This means that upwards of 200 translators will be exiting the workforce in the relatively near future. Are there enough younger people coming through the education system to replace them?

FIG. 14: SHARE OF THE ARTS AND CULTURE WORKFORCE IN 2016 LIVING IN ANOTHER PROVINCE OR COUNTRY (2011)



Source: Statistics Canada Table 36-10-0452-01

FIG. 15: SHARE OF THE WORKFORCE OVER THE AGE OF 55, SELECTED OCCUPATIONS (NEW BRUNSWICK)



*and technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts.

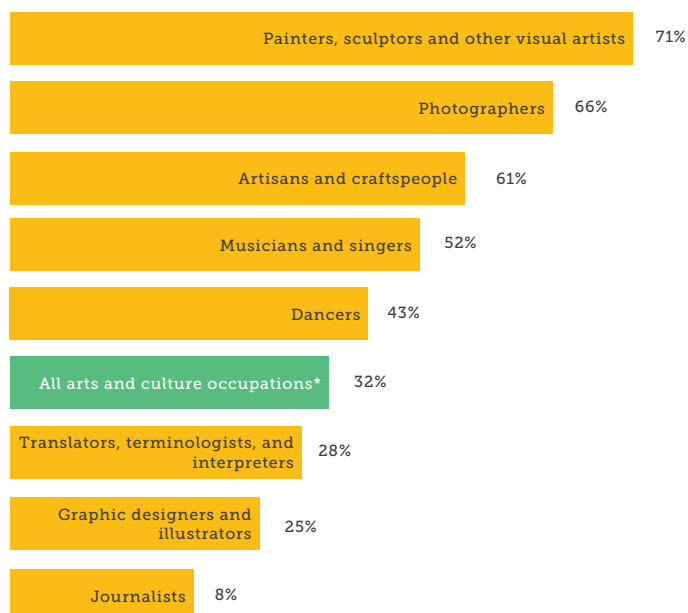
Source: Statistics Canada 2016 Census.

2.10 SELF-EMPLOYMENT

The arts and culture workforce has a much higher rate of self-employment when compared to the rest of workforce in New Brunswick and across Canada. Thirty-two percent of all arts and culture workers are self-employed in New Brunswick compared to only 8 percent for all workers. Across Canada, the self-employment rate among artists and culture workers is even higher at 38 percent of the total.

The self-employment rate varies widely by occupation. Those working in jobs such as librarians and archivists have very low rates of self-employment whereas creative and performing artists tend to work for themselves. Figure 16 shows the self-employment rate for selected occupational groups in New Brunswick. Over 70 percent of all working as painters, sculptors, and other visual artists are self-employed as are two out of every three photographers.

FIG. 16: SELF-EMPLOYMENT RATE, SELECTED OCCUPATIONS (NEW BRUNSWICK)



*Excludes management occupations
Source: Statistics Canada 2016 Census.

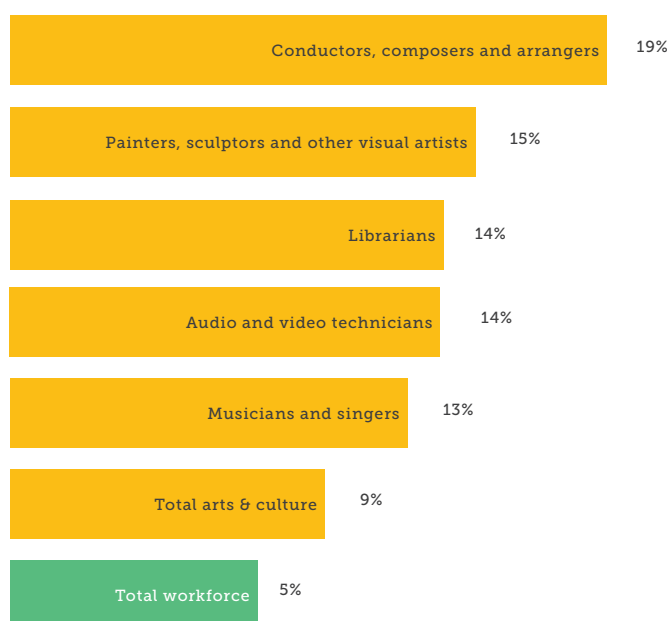
2.11 THE NEW CANADIAN WORKFORCE

Immigrants (new Canadians), account for only 5 percent of New Brunswick's workforce (as of 2016) compared to 23 percent of the workforce across the country. The number of immigrants has risen in recent years and is now over 7 percent of the total (as of 2018). Detailed information on employment by occupation is only available from the 2016 Census.

Census data points to a considerably higher share of the arts and culture workforce being made up of immigrants. A little over 9 percent of arts and culture workers are immigrants (565 in total).

Figure 17 shows a selected number of occupations where the immigration rate is well above average. For example, 15 percent of all those who work as painters, sculptors, and other visual artists are immigrants.

FIG. 17: IMMIGRANTS AS A SHARE OF THE WORKFORCE, BY OCCUPATIONS (NEW BRUNSWICK)



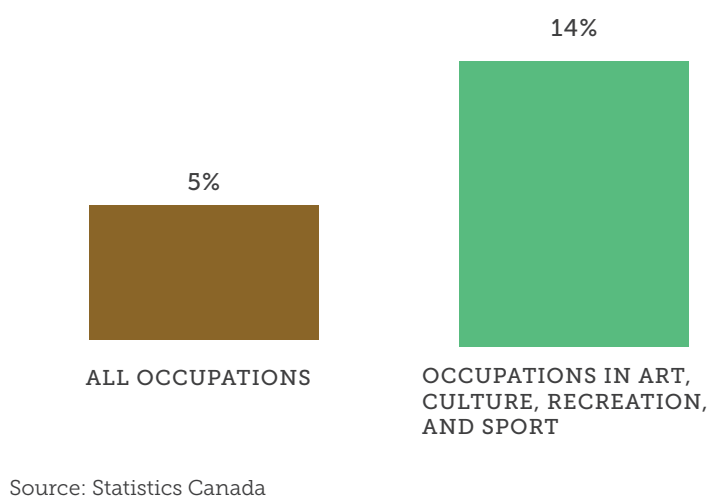
Source: Statistics Canada 2016 Census.

2.12 HOLDING DOWN MULTIPLE JOBS

The annual Labour Force Survey publishes data on multiple jobholders by occupation. These are individuals who are working multiple paid jobs at the time of the survey. The data does not include those who are involved in artistic endeavours as a hobby with little or no pay. Figure 18 shows the percentage of workers by occupation who held down two or more jobs in 2018.

For those in occupations related to arts and culture, 14 percent were working two formal jobs compared to only 5 percent across all occupations. There is a similar trend across Canada, where 11 percent of workers in arts and culture work two or more jobs.

FIG. 18: SHARE OF THE WORKFORCE HOLDING TWO OR MORE JOBS AT THE SAME TIME, NB (2018)



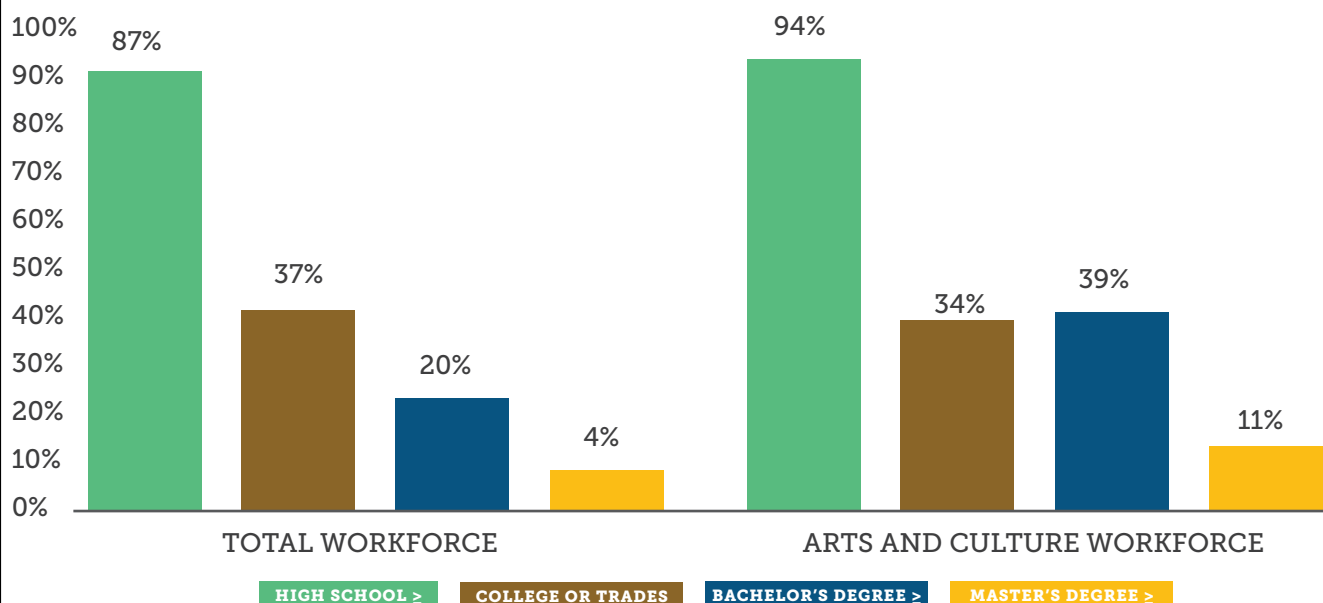
2.13 EDUCATION LEVELS

On average, workers in arts and culture occupations are much more educated than the overall workforce. As shown in Figure 19, 94 percent have at least a high school diploma. 39 percent have at least a university degree (compared to 20 percent among the entire workforce), and 11 percent have a master's degree or higher (compared to only 4 percent among the total workforce).

Education levels vary by occupational group. Among librarians, archivists, conservators, and curators; 87 percent have at least a university degree whereas only 13 percent of graphic arts technicians, and 20 percent of interior designers have a university degree. Figure 19 shows the educational attainment level for a number of other arts-related occupations. Creative designers and craftspersons represent a larger share of people with college or trade education while painters, sculptors. Other visual artists have a mixed educational profile with 38 percent having a college or trade education, 34 percent at least a university degree and 11 percent a master's degree or higher.

Across Canada, workers in the arts and culture sector are more likely to have a university degree (43 versus 39 percent).

FIG. 19: SHARE OF THE PROVINCIAL WORKFORCE BY EDUCATIONAL ATTAINMENT

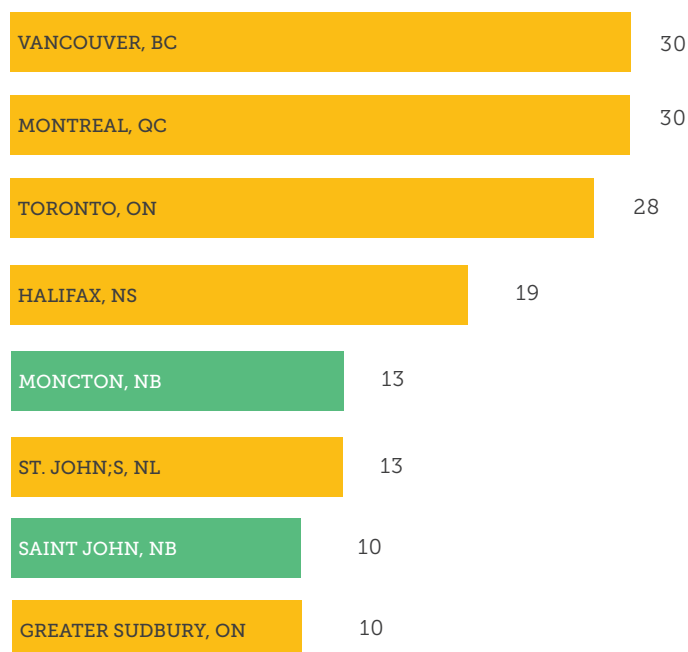


2.13.1 EDUCATION LEVELS – URBAN CENTRES

The detailed education attainment statistics by occupation discussed in section 2.8 are not available for urban centres across Canada. However, there is data available related to field of study at the provincial, urban centre, and municipal levels. Across New Brunswick, over 5,700 people have a degree or diploma in the arts. Roughly 28 percent of them live in Greater Moncton and 18 percent live in Greater Saint John.

Figure 20 shows the number of adults with an arts-related post-secondary education out of every 1,000 people living in Canada's large urban centres (Census Metropolitan Areas). Vancouver, Montréal, and Toronto dominate with between 28 to 30 people out of every 1,000 having an arts degree. Out of the 35 CMAs across Canada, Moncton ranks below the median urban centre (20th) and Saint John ranks 34th. Fredericton is not a CMA and therefore is not included in this analysis.

FIG. 20: SHARE OF THE ADULT POPULATION WITH AN ARTS-RELATED POST-SECONDARY DEGREE OR DIPLOMA (OUT OF EVERY 1,000 PEOPLE), CENSUS METROPOLITAN AREAS

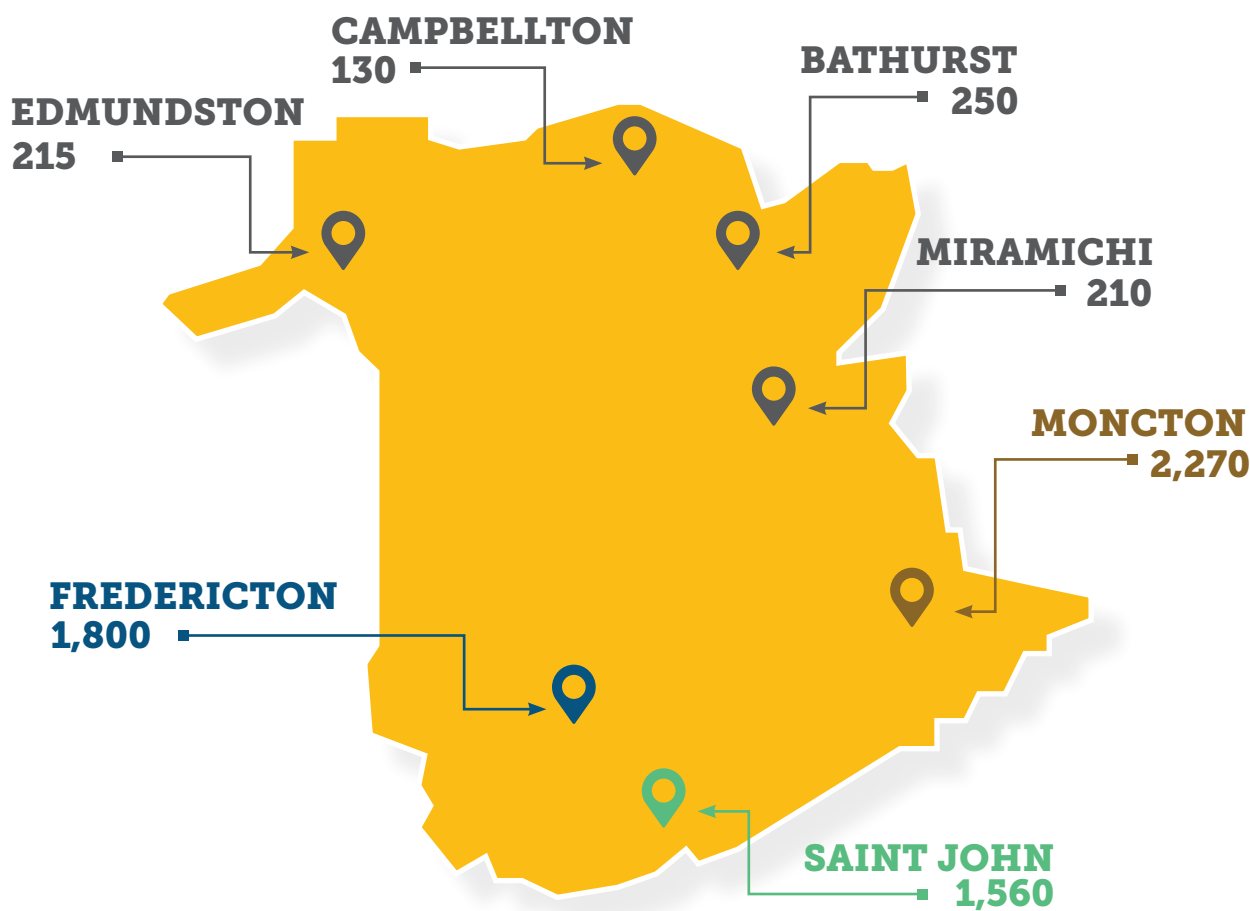


Source: Statistics Canada 2016 Census.

2.13.2 VISUAL AND PERFORMING ARTS EDUCATED WORKFORCE: MUNICIPALITIES

Among municipalities across Canada with a population of at least 5,000, Fredericton has the highest concentration of population in New Brunswick with post-secondary education specifically in visual and performing arts. However, this still only ranks New Brunswick's capital city 163rd out of more than 550 municipalities across the country. Dieppe is ranked 239th and the City of Moncton 242nd, and the City of Saint John ranks 384th out of 550+ municipalities for the share of the population with post-secondary training in visual and performing arts.

NEW BRUNSWICK'S ARTS AND CULTURE WORKFORCE



2.14 THE ARTS AND CULTURE WORKFORCE: URBAN PERSPECTIVE

Table 21 shows the arts and culture workforce by urban centre in New Brunswick. Moncton has the largest arts and culture workforce but Fredericton has more arts and culture workers adjusted for size. In fact Fredericton ranks 27th out of 152 urban centres across Canada for the relative size of its arts and culture workforce. Edmundston ranks fourth out of New Brunswick's seven urban centres with 215 workers in arts and culture (1.2 percent of the total workforce). It is important to reiterate these are people for whom their arts and culture activities represent their primary way of earning income (or their primary occupation). There are many thousands more who are involved in arts-related activities that are not dependent on them as their primary source of income.

Table 21: ARTS AND CULTURE WORKFORCE AND NATIONAL RANKING, NEW BRUNSWICK URBAN CENTRES (2016)

URBAN CENTRE:	ARTS AND CULTURE WORKFORCE	% OF THE TOTAL WORKFORCE	RANK OUT OF 152 URBAN CENTRES ACROSS CANADA*
Moncton	2,270	1.9%	44th
Saint John	1,560	1.6%	69th
Fredericton	1,800	2.2%	27th
Bathurst	250	1.0%	134th
Miramichi	210	0.9%	143rd
Campbellton	130	0.9%	148th
Edmundston	215	1.2%	118th

*Compares the arts and culture workforce as a share of the total workforce.
Source: Statistics Canada 2016 Census.

Detailed arts and culture related occupational statistics for the areas of Bathurst, Miramichi, Campbellton, and Edmundston have not been published, but there is information on the detailed workforce in the three larger urban centres. See Appendix A for a full list of occupations and how many they employ in the three larger urban centres, as well as in New Brunswick overall.

Table 22 shows total employment in library-related occupations in the three large urban centres and where that employment ranks out of the 152 urban centres across Canada. There were 100 people working in library-related occupations in the Fredericton area. This means that Fredericton has the 7th highest concentration of workers in library-related occupations in Canada, adjusted for size.

Table 23 shows employment in writing-related occupations. Moncton has the largest number, with 350 working in these occupations compared to 285 in Fredericton and 175 in Saint John. However, adjusted for size, Fredericton has a higher concentration and ranks 12th out of 152 urban centres for employment in this occupational group. Moncton ranks 20th and Saint John 58th. Moncton is also notable for its very high concentration of workers in translation and interpretation occupations. The urban centre ranks 3rd out of 152.

Table 24 shows total employment in creative and performing arts occupations by urban centre. There are 400 people working as creative and performing artists in Moncton with the largest number working as musicians and singers. Compared to the rest of the country, Moncton has a high concentration of people who earn their living as dancers (ranking 26th out of 152 urban centres in Canada and 2nd among Atlantic Canada's 19 urban centres). Saint John has the most people earning a living as painters, sculptors, and other visual artists compared to Moncton and Fredericton (although Fredericton has a larger share of workers in this occupational group).

Table 22: EMPLOYMENT IN LIBRARY-RELATED OCCUPATIONS

DETAILED OCCUPATION	MONCTON # RANK*		SAINT JOHN # RANK*		FREDERICTON # RANK*	
511 LIBRARIANS, ARCHIVISTS, CONSERVATORS AND CURATORS	40	85	40	65	100	7

*Compares the arts and culture workforce as a share of the total workforce, out of 152 urban centres.
Source: Statistics Canada 2016 Census.

Table 23: EMPLOYMENT IN WRITING-RELATED OCCUPATIONS

DETAILED OCCUPATION	MONCTON # RANK*		SAINT JOHN # RANK*		FREDERICTON # RANK*	
512 WRITING TRANSLATING AND RELATED PROFESSIONALS	350	20	175	58	285	12
5121 AUTHORS AND WRITERS	65	74	60	70	130	12
5122 EDITORS	40	80	45	56	65	17
5123 JOURNALISTS	65	46	45	53	45	47
5125 TRANSLATORS, TERMINOLOGISTS AND INTERPRETERS	175	3	35	48	50	28

*Compares the arts and culture workforce as a share of the total workforce, out of 152 urban centres.
Source: Statistics Canada 2016 Census.

Table 24: EMPLOYMENT IN CREATIVE AND PERFORMING ARTS OCCUPATIONS

DETAILED OCCUPATION	MONCTON # RANK*		SAINT JOHN # RANK*		FREDERICTON # RANK*	
513 CREATIVE AND PERFORMING ARTISTS	400	53	305	62	305	44
5131 PRODUCERS, DIRECTORS, AND CHOREOGRAPHERS	85	37	25	99	40	71
5132 CONDUCTORS, COMPOSERS, AND ARRANGERS	10	51	20	25	15	29
5133 MUSICIANS AND SINGERS	140	65	150	37	125	41
5134 DANCERS	75	26	10	104	35	64
5135 ACTORS AND COMEDIANS	30	52	15	65	10	69
5136 PAINTERS, SCULPTORS, AND OTHER VISUAL ARTISTS	55	98	75	54	70	45

*Compares the arts and culture workforce as a share of the total workforce, out of 152 urban centres.
Source: Statistics Canada 2016 Census.

Table 25 shows employment in selected technical occupations related to the arts. There are 100 people earning their living as photographers living in the Moncton region, ranking the community 39th of 152 urban centres across Canada and third among Atlantic Canada's 19 urban centres. Fredericton is home to 25 people who work as film and video camera operators. This is enough to rank the urban centre 20th in the country for employment concentration in this occupational group.

Finally, Table 26 shows the number of people employed as creative designers and craftspersons in the three large urban centres. There are 90 people who earn their primary income as artisans and craftspersons in Fredericton. Adjusted for size, this ranks Fredericton 24th out of 152 urban centres across Canada and number one among the 19 urban centres across Atlantic Canada.



Table 25: EMPLOYMENT IN SELECTED TECHNICAL OCCUPATIONS RELATED TO THE ARTS

DETAILED OCCUPATION	MONCTON # RANK*		SAINT JOHN # RANK*		FREDERICTON # RANK*	
5221 PHOTOGRAPHERS	100	39	70	63	50	83
5222 FILM AND VIDEO CAMERA OPERATORS	35	24	10	67	25	20
5223 GRAPHIC ARTS TECHNICIANS	20	45	0	70	20	36
5224 BROADCAST TECHNICIANS	0	44	0	44	10	21
5225 AUDIO AND VIDEO RECORDING TECHNICIANS	35	56	15	79	20	68

*Compares the arts and culture workforce as a share of the total workforce, out of 152 urban centres.
Source: Statistics Canada 2016 Census.

Table 26: EMPLOYMENT AS CREATIVE DESIGNERS AND CRAFTSPERSONS

DETAILED OCCUPATION	MONCTON # RANK*		SAINT JOHN # RANK*		FREDERICTON # RANK*	
524 CREATIVE DESIGNERS AND CRAFTSPERSONS	345	75	260	89	275	54
5241 GRAPHIC DESIGNERS AND ILLUSTRATORS	215	41	175	45	140	51
5242 INTERIOR DESIGNERS AND INTERIOR DECORATORS	65	94	35	111	25	116
5243 THEATRE, FASHION, EXHIBIT AND OTHER CREATIVE DESIGNERS	30	62	10	81	20	63
5244 ARTISANS AND CRAFTSPERSONS	35	124	40	110	90	24

*Compares the arts and culture workforce as a share of the total workforce, out of 152 urban centres.
Source: Statistics Canada 2016 Census.



3. THE ARTIST'S PERSPECTIVE

This section includes the results of a survey of the arts workforce in New Brunswick conducted for this report. Over 250 people responded to this survey and provided important insight into their work, revenue generation, markets, education and other aspects of their life.

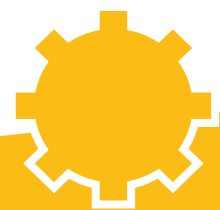
An online survey of New Brunswick artists was conducted between late July and early September 2019 to gather insight that would inform this report on the arts and culture workforce in New Brunswick. It was promoted by ArtsLink NB and the AAAPNB. The survey was substantially completed by more than 250 artists. Not all respondents answered all questions. For each question the number of respondents is provided (where applicable). Appendix B contains the full survey results.

A survey filled out by more than 250 New Brunswick artists provided insight into the workforce that goes deeper than the census and other Statistics Canada data.

“[NB HAS] A VERY SUPPORTIVE ARTS COMMUNITY[...] NB’S MULTIPLE CULTURES — INDIGENOUS, ACADIAN, ANGLO, AND OTHERS — ARE INSPIRING.”

Statistics Canada and other organizations report that New Brunswick artists receive considerably less funding from government and other philanthropic sources. This survey uncovered some reasons for this funding gap including perceptions among artists of ineligibility, the complexity of applying for funding, and a lack of formal arts-related education which is a barrier for some sources of funding.

New Brunswick’s main advantages, according to artists are community support, small size, cost of living, and beauty of the place.



To support the sector, artists would like to see more funding, support for marketing outside New Brunswick, training on business-related topics, and mentorship and networking opportunities.

"GETTING
ARTISTS MORE
CONNECTED TO
EACH OTHER
[...] FORGING
RELATIONSHIPS
WITH OTHER
NEARBY
PROVINCES."

"PROMOTING NB
ARTISTS OUTSIDE
OF NB, DEFINING
AND DEFENDING
THE STATUS OF
PROFESSIONAL
ARTIST."

Other policies artists would like to see pursued include promoting the value of the arts sector to New Brunswickers, promoting more public art (such as in schools and public spaces), and encouraging more festivals and venues to exhibit and promote art.

"WE NEED MORE FESTIVALS,
BIENNIALS, AND OTHER EVENTS
THAT ENCOURAGE ARTISTS TO COME
TOGETHER."

3.1 DEMOGRAPHIC PROFILE OF RESPONDENTS

More women than men took the time to fill out the survey 71 percent of the total responses came from woman compared to 27 percent that came from men. This despite the fact that women only represent 56 percent of the total arts and culture workforce in New Brunswick.

The age distribution of the survey respondents was similar to the age distribution of the province's arts and culture workforce overall. 44 percent were over the age of 55 and 23 percent were under the age of 35.

Only 58 percent of respondents were born in New Brunswick. Thirty-three percent were born elsewhere in Canada and only 9 percent were born elsewhere in the world.

The language breakdown was also fairly consistent with the provincial population, with 66 percent having English as their first language, 30 percent having French, and 4 percent some other language.

Most of the respondents were professional artists (63 percent) or emerging artists (29 percent). The survey allowed for multiple responses and 21 percent identified themselves as working in arts administrator roles and 23 percent in arts-related education.

Fifty-nine percent of visual artists responded to the survey, making them the biggest group followed by writers (13 percent) and those working in theatre (12 percent).

3.2 ARTISTIC AND CREATIVE ACTIVITIES

Among the 203 respondents considering themselves professional artists, 42 percent have spent 20 years or more practising their art, 21 percent have spent between 10-19 years, and 37 percent have been practising for less than 10 years.

Among those who primarily work as artists, only 23 percent spend more than 30 hours per week working on their art. Forty-six percent spend between 11 and 30 hours, and 28 percent spend less than 10 hours per week working on their art.

The majority of artists work from home (55 percent) followed by rented spaces (15 percent), shared spaces with other artists (11 percent) and other venues such as an employer's premises, or public spaces. Most have a very short commute to work. Only 13 percent have a one-way commute of 20 minutes or more.

3.3 EMPLOYMENT AND VOLUNTEERISM PROFILE

Among those identifying themselves as professional artists, the vast majority are self-employed (78 percent). Among those working primarily as arts administrators, most are employees of an organization or firm, and among those working primarily in arts education, most are contracted freelance employees, self-employed, or working part-time for an employer.

Artists spend a considerable amount of time each week on related non-artistic activity. 25 percent of respondents spend at least a quarter of the time on business-related activity, while 40 percent of respondents said that business-related activities take less than 10 percent of their time each week.

About 40 percent of respondents indicated they are involved in volunteer activities. Most of those volunteering are involved in arts organizations.

3.4 INCOME PROFILE

In general, the respondents to this survey have an income profile similar to that of the arts and culture workforce overall. Two out of every three earn less than \$35,000 per year (from all sources) and only 6 percent earn more than \$75,000 per year.

Among those who earn income from their artistic activities (regardless of employment status), only 27 percent earn 100 percent of their annual income from their art while 43 percent earn less than 25 percent of their total income from arts-related activities.

Only 9 percent of respondents collected Employment Insurance (EI) during 2018, far less than the average for all occupations (25 percent).

3.5 EDUCATION AND TRAINING PROFILE

Regarding training in their specific art and creative activities, most survey respondents say they received their training from professional development activities. One hundred respondents indicated they were self-taught and 69 have a bachelor's degree in their arts-related discipline, 43 have a graduate degree in their arts-related discipline, and a smaller number, 39, indicated they were involved in apprenticeships or mentoring to learn their art.

On an ongoing basis, respondents are mostly involved in professional development to advance their creative and artistic training but approximately 20 percent [52 of 250] also indicated some form of apprenticeships or mentoring on an ongoing basis.

When asked in what areas they could use additional training and development, the top responses were:

- Marketing/accessing markets outside NB.
- Grant application development.
- Where to search for funding support.
- Business skills/running a small business.
- Digital publishing/online promotion.

3.6 PROMOTING AND EXHIBITING THEIR ART

Among those who exhibit or perform their art on a regular basis, half exhibit or perform five times or more per year (over half of those are continuously promoting their art through galleries, retail outlets or online). One in three show their art less than five times per year.

The most common locations for promoting or exhibiting their art were non-profit arts organizations (82 responses), online (74 responses), in a privately owned venue, gallery or retail outlet (52 responses) or in a community theatre (20 responses).

The primary market for artistic revenue generation is the local community followed by elsewhere in New Brunswick, elsewhere in Canada, and internationally. 60 percent of respondents are generating export revenue from markets outside New Brunswick.



3.7 GOVERNMENT OR PHILANTHROPIC SUPPORT

The top source for funding applications for this group of artists was artsnb (90 grants awarded) followed by the Canada Council for the Arts (64). However, less than half of respondents have ever received grants or public funding for their art. The main barriers to successful grant applications included:

- Time commitment for application process.
- Perception of ineligibility for programs.
- Concerns it is not worth the time and effort.
- Difficulties during the application process.
- Lack of knowledge about opportunities.
- False perceptions of who qualifies as a professional artist.
- Do not feel the need for this type of support.

3.8 ADVANTAGES/DISADVANTAGES OF BEING AN ARTIST IN NEW BRUNSWICK

MAIN ADVANTAGES	MAIN DISADVANTAGES
Community support	Too small/lack of a local market
Small size	Challenges developing markets outside NB
Cost of living	Lack of galleries/ opportunities art distribution
Beauty of the place	Less funding available
Bilingualism and support for minority language artists	Weak economy/outlook for New Brunswick



3.9 SUPPORTING THE ARTS AND CULTURE WORKFORCE

Respondents were asked for insight into what kind of support would help strengthen the arts community in New Brunswick. There were 144 responses to this question and most of the ideas can be grouped into a few themes:

More funding for local artists.

Support for marketing/promotion outside New Brunswick.

Training on business and marketing principles, grant applications, etc.

Mentorship and networking opportunities.

More quality childcare services (mentioned by six respondents).

Other interesting responses included a focus on municipal public art policies, efforts to attract more artists to New Brunswick (including repatriation), and more writing about the arts in local media.

Respondents were asked to list the professional organizations with which they are affiliated (member, etc.). Over 80 are members of ArtsLink NB, 41 are members of Association acadienne des artistes professionnel.le.s du Nouveau-Brunswick (AAAPNB) and 24 are members of Canadian Artists' Representation/Le Front des artistes canadiens (CARFAC). There were over 60 other organizations mentioned, which can be grouped into three broad categories: subject matter-focused (e.g. Writers Federation of N.B.), geography-focused (e.g. Bathurst Art Society) or other (e.g. New Brunswick Teachers Association).

3.10 POLICIES TO SUPPORT ARTISTS AND THEIR DEVELOPMENT

The last question on the survey was meant to gather insight as to how artists could be better supported in New Brunswick. The specific question asked was: Do you have any thoughts on policies or initiatives that could be put in place to support artists and their development in New Brunswick? Responses can be grouped into six areas:

Funding.

Efforts to raise the professionalism of the sector.

Promote the value of the arts sector to New Brunswickers.

The cost of living/working for artists.

Promote more public art/art in schools.

More support for festivals around the province to exhibit and promote art.

4. MOVING FORWARD

The following insights are gleaned from the first three sections and looks at ways the arts and culture workforce, as well as culture industries, could be supported and strengthened in the years ahead.

This report outlines the economic importance of the arts and culture workforce in New Brunswick and raises important issues related to the workforce in the years ahead. Below are a few areas where government, the arts and culture sector, and other stakeholders could focus their activities to support the workforce and ensure it continues to grow in New Brunswick.

ADDRESSING THE AGING WORKFORCE

Attract young artists from both inside and outside the province in order to improve sector growth in the face of an aging workforce: Both the aging workforce and youth out-migration are struggles across all sectors. We need NB to be a viable home for young artists and newcomers. Cultural workers are important for creating a sense of place and attracting and retaining population.

INVESTING IN OUR ARTISTS

Focussed funding and income measures:

New Brunswick should strive to meet the national average of funding support for artists and arts organizations from government and other philanthropic sources. This requires meaningful increases and diversity in types of funding opportunities available to artists.

CREATING SPACE FOR CREATION

Support venues and activities that are meant to incubate new artists (i.e. shared creative spaces and other supports). Our creative workforce needs spaces in which to work, and grow as professionals: this includes studio facilities, a variety of performance spaces, and support for residency opportunities.



ROBUST TRAINING OPPORTUNITIES

Ensure education and training activities are aligned with demand. Also look at the opportunity to attract students from across Canada and around the world. New Brunswick has a number of gaps in its available arts training programs and arts occupations which result in many jobs being outsourced to larger provinces.

PROMOTION OF OUR ARTISTS

Strengthen the marketing and promotion of New Brunswick artists within the province and beyond. To export our cultural products we need to explore new market opportunities. This takes time and a considerable amount of effort.

INDUSTRY ENHANCEMENT

Treat the cultural sector as strategically important, similar to manufacturing, information technology, and tourism. There is a noticeable discrepancy between levels of investment in the arts and culture sector and the outcomes both intrinsic and extrinsic.

PROFESSIONAL DEVELOPMENT

Look for ways to strengthen and better coordinate professional support for the arts community. Regular opportunities for professional development are important to the longevity of any career. Programs like Craft NB's export workshops and ArtsLink's arts incubator are excellent examples of essential skills programs New Brunswick artists can access to enhance their careers.



4.1 ATTRACTING YOUNGER ARTISTS INTO THE WORKFORCE

Like the rest of the workforce, arts and culture workers are aging and a significant number of them are heading towards retirement in the next decade or so. **We must treat this important sector like any other and develop a strategy to ensure young people are encouraged to consider arts occupations among their many choices.**

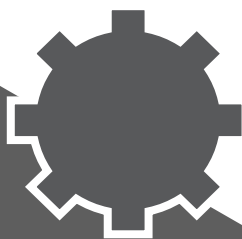
New Brunswick already has an above-average inward migration rate (from other provinces and countries) for workers in the arts and culture workforce, despite the lower income levels. **Should we be promoting arts and culture workforce opportunities, including self-employment, to young people living outside the province?** There is already a much higher proportion of immigrants in the arts and culture workforce as compared to several other sectors of the New Brunswick economy.

4.2 TARGETING FUNDING AND INCOME SUPPORT

There is a very high self-employment rate among the arts and culture workforce, and many workers hold down two or more jobs. In addition, work is often intermittent. The survey conducted for this report indicates relatively few in the sector are collecting employment insurance. **Should it be easier for artists to collect employment insurance when needed?**

Many older artists are now collecting public pension income, some of which is clawed back if they continue to generate income from selling their art. **Should we encourage governments to consider changes to these programs to incentivize older artists to stay in the workforce longer?**

The data in this report indicates New Brunswick artists and arts organizations, in general, receive far less funding from these sources than artists outside New Brunswick. **Can we do more to ensure New Brunswick artists have access to funding such as the Canada Council for the Arts and other philanthropic organizations?**



4.3 INCUBATION OF NEW ARTISTS

It is now common practice to establish start-up incubators to support entrepreneurs in technology-based sectors and, increasingly, in other sectors.

Though the province has a number of start-up programs such as the Summer Institute at the University of New Brunswick, the only arts-specific business accelerator is ArtsLink NB's CATAPULT Arts Accelerator intensive. The program teaches artists of all disciplines the fundamental skills needed to make a living through their creative practice.

An additional approach could be exploring models for shared creation spaces, access to professional services, marketing support, and funding programs.

Many artists struggle to find adequate studio facilities or practice and performance spaces. These spaces are essential to artists in their professional development and the continuation of their careers.

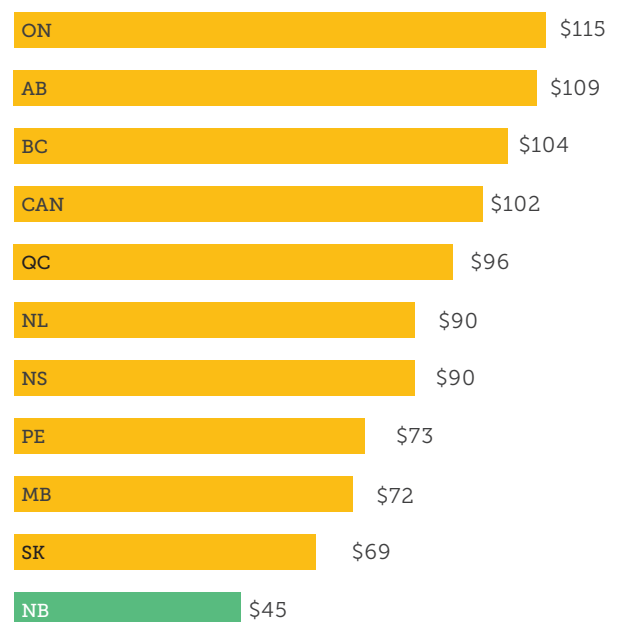
4.4 EDUCATION AND TRAINING

The survey indicates many artists could benefit from training in a variety of areas related to the business side of the industry: grant writing, marketing, online promotion, etc. The province needs flexible training options for the arts community.

Is the post-secondary education system doing enough to ensure a cultural future for our province? Specific arts and culture occupations such as translators and visual artists have a significant number of professionals over the age of 55. **Are university and college programs boosting enrolment to compensate and ensure there is a talent pipeline?**

According to Statistics Canada, New Brunswick generates less economic activity from arts and culture-related education and training than any other province, adjusted for population size. With important assets such as Mount Allison University and the New Brunswick College of Craft and Design could this become a growth opportunity? **Is there potential for education and training to be a growth sector for New Brunswick attracting students from around the world?**

FIG. 12: GDP PER CAPITA FROM ARTS AND CULTURE-RELATED EDUCATION AND TRAINING



*Source: Statistics Canada

4.5 MARKETING AND PROMOTION OF NEW BRUNSWICK ARTISTS

This was a key theme throughout the survey conducted for this report. Are there ways we can better promote our artists and New Brunswick creative riches? **Why not treat culture as a strategically important sector and be more deliberate about export markets?**

Promoting New Brunswick artists within New Brunswick was another key theme. Encouraging New Brunswick artists through public art and art in schools and other venues is an important way to raise awareness and also generate revenue for the sector.

4.6 TREATING CULTURE INDUSTRIES AS A STRATEGICALLY IMPORTANT SECTOR

Despite a declines in recent years, the contribution to the gross domestic product (GDP) from culture exceeded \$550 million in 2017 and was higher than many other strategically important sectors. Why not leverage the benefits of this sector and employ measures applied to other, less performing sectors such as fishing/seafood processing, forest products, and information technology? Should it be part of Opportunities New Brunswick's focus? **Does ACOA put enough emphasis on the culture sector as a revenue driver?**

4.7 EXAMINING CULTURE ORGANIZATIONS STRUCTURES AND SIZES

Investing in organizational capacity through stable operating funds and employment incentives will improve the health of the sector. Examining the health of the cultural sector in provinces that have "champion" cultural organizations (over 50 employees), one might identify a correlation between capacity building and the vitality of the sector.

4.8 PROFESSIONAL SUPPORT FOR THE ARTS COMMUNITY

Many New Brunswick artists are members of multiple organizations within New Brunswick as well as national and international organizations. **Are there opportunities for these various bodies to collaborate better to address key workforce and development issues?**



APPENDIX A: DETAILED CULTURAL EMPLOYMENT BY OCCUPATION (2016)

OCCUPATIONAL GROUP	NEW BRUNSWICK	MONCTON CMA	SAINT JOHN CMA	FREDERICTON CMA	REMAINDER OF NB
051 MANAGERS IN ART, CULTURE, RECREATION, AND SPORT	510	100	105	85	220
5 OCCUPATIONS IN ARTS AND CULTURE*	5,710	1,510	1,510	1,240	1,945
51 PROFESSIONAL OCCUPATIONS IN ARTS AND CULTURE	2,870	790	520	685	875
511 LIBRARIANS, ARCHIVISTS, CONSERVATORS, AND CURATORS	265	40	40	100	85
5111 LIBRARIANS	175	30	30	60	55
5112 CONSERVATORS AND CURATORS	45	10	15	-	20
5113 ARCHIVISTS	40	-	-	35	5
512 WRITING TRANSLATING AND RELATED PROFESSIONALS	1,185	350	175	285	375
5121 AUTHORS AND WRITERS	370	65	60	130	115
5122 EDITORS	200	40	45	65	50
5123 JOURNALISTS	200	65	45	45	45
5125 TRANSLATORS, TERMINOLOGISTS, AND INTERPRETERS	420	175	35	50	160
513 CREATIVE AND PERFORMING ARTISTS	1,420	400	305	305	410
5131 PRODUCERS, DIRECTORS, CHOREOGRAPHERS AND RELATED OCCUPATIONS	225	85	25	40	75
5132 CONDUCTORS, COMPOSERS, AND ARRANGERS	80	10	20	15	35
5133 MUSICIANS AND SINGERS	565	140	150	125	150
5134 DANCERS	155	75	10	35	35
5135 ACTORS AND COMEDIANS	85	30	15	10	30
5136 PAINTERS, SCULPTORS AND OTHER VISUAL ARTISTS	305	55	75	70	105
52 TECHNICAL OCCUPATIONS IN ART, CULTURE*	2,840	725	495	550	1,070
521 TECHNICAL OCCUPATIONS IN LIBRARIES, PUBLIC ARCHIVES, MUSEUMS, AND ART GALLERIES	430	75	70	75	210
5211 LIBRARY AND PUBLIC ARCHIVE TECHNICIANS	150	30	20	25	75
5212 TECHNICAL OCCUPATIONS RELATED TO MUSEUMS AND ART GALLERIES	275	50	50	50	125
522 PHOTOGRAPHERS, GRAPHIC ARTS TECHNICIANS, AND TECHNICAL AND CO-ORDINATING OCCUPATIONS IN MOTION PICTURES, BROADCASTING, AND THE PERFORMING ARTS	785	250	125	155	255
5221 PHOTOGRAPHERS	325	100	70	50	105
5222 FILM AND VIDEO CAMERA OPERATORS	70	35	10	25	-
5223 GRAPHIC ARTS TECHNICIANS	80	20	-	20	40
5224 BROADCAST TECHNICIANS	15	-	-	10	5
5225 AUDIO AND VIDEO RECORDING TECHNICIANS	110	35	15	20	40
5226 OTHER TECHNICAL AND CO-ORDINATING OCCUPATIONS IN MOTION PICTURES, BROADCASTING, AND THE PERFORMING ARTS	100	30	10	20	40
5227 SUPPORT OCCUPATIONS IN MOTION PICTURES, BROADCASTING, PHOTOGRAPHY, AND THE PERFORMING ARTS	80	20	20	10	30
523 ANNOUNCERS AND OTHER PERFORMERS, N.E.C.	210	50	45	50	65
5231 ANNOUNCERS AND OTHER BROADCASTERS	145	35	25	30	55
5232 OTHER PERFORMERS, N.E.C.	65	15	20	20	10
524 CREATIVE DESIGNERS AND CRAFTSPERSONS	1,410	345	260	275	530
5241 GRAPHIC DESIGNERS AND ILLUSTRATORS	750	215	175	140	220
5242 INTERIOR DESIGNERS AND INTERIOR DECORATORS	200	65	35	25	75
5243 THEATRE, FASHION, EXHIBIT, AND OTHER CREATIVE DESIGNERS	75	30	10	20	15
5244 ARTISANS AND CRAFTSPERSONS	385	35	40	90	220

*Excludes athletes, coaches, referees and related occupations. Source: Statistics Canada 2016 Census.

APPENDIX B: ECONOMIC IMPACT

ECONOMIC STRIDES

The arts are a wealth generator with room for growth. In 2017, the arts sector in New Brunswick contributed \$550 million to the provincial GDP. Though substantial, this amount represents a contribution of roughly 1.8 percent — well below the national average of 2.7 percent. Similarly, artists represent 1.9 percent of New Brunswick's labour force versus a national average of 3.6 percent. This disparity points to a growth opportunity, more arts employment could bring per capita cultural output and productivity up to national averages.

ARTS FUNDING: CANADA COUNCIL FOR THE ARTS

2016-2017

Canada Council total funding for the country: **\$184,755,746**
Canada Council funding to New Brunswick: **\$2,976,880**
Per capita Canada Council funding for the country: **\$5.28**

Per capita Canada Council Funding for New Brunswick: \$3.97

Per capita Canada Council funding for Nova Scotia: **\$6.08**

2017-2018

Canada Council total funding for the country: **\$205,360,439**
Canada Council funding to New Brunswick: **\$2,600,500**
Per capita Canada Council funding for the Country: **\$5.59**

Per capita Canada Council Funding for New Brunswick: \$3.42

Per capita Canada Council funding for Nova Scotia: **\$6.05**

2018-2019

Canada Council total funding for the country: **\$242,700,000**
Canada Council funding to New Brunswick: **\$3,800,000**
Per capita Canada Council funding for the Country: **\$6.64**

Per capita Canada Council Funding for New Brunswick: \$4.95

Per capita Canada Council funding for Nova Scotia: **\$6.83**

Success rate (2018-19): New Brunswick organizations and individual artists who applied for Canada Council funding combined: **219**. Successful applicants: **112**. This represents a success rate of 51 percent, as compared to the national rate of 56%.

Both the number of applicants and success rate have increased over the last year. The funding distributed by the Canada Council for the Arts increased by 18 percent and the funding awarded to New Brunswick artists increased by 46 percent.

Source: Canada Council for the Arts, Stats and Stories. <https://canadacouncil.ca/research/stats-and-stories>. Stats and Stories., (2019).

GROWING THE SECTOR: ECONOMY AND SOCIETY

A modest 5 percent increase in New Brunswick's culture GDP would result in*:

Over 830 new jobs across the province

Labour income in excess of \$16.5 million

Consumer spending of more than \$12 million

\$5.5 million in new tax revenue for the government**

New arts and cultural content to be enjoyed by New Brunswickers and others across Canada and beyond.

*includes direct, indirect and induced economic activity.

**all three levels of government combined.

Assumes GDP growth from the performing arts, heritage institutions, and related activities. Derived from Statistics Canada Table 36-10-0595-01.

APPENDIX C: ARTISTS SURVEY RESULTS

An online survey of New Brunswick artists was conducted between late July and early September 2019. The survey was promoted by ArtsLink NB and the AAAPNB and was substantially completed by more than 250 artists (not all respondents answered all questions). The number of respondents is indicated for each question.

GENDER

Over 260 people substantially filled out the survey (i.e. answered at least 60 percent of the questions). Of this group, 71 percent were female, 27 percent male, 1 percent gender-fluid and 2 percent gender non-conforming.

AGE

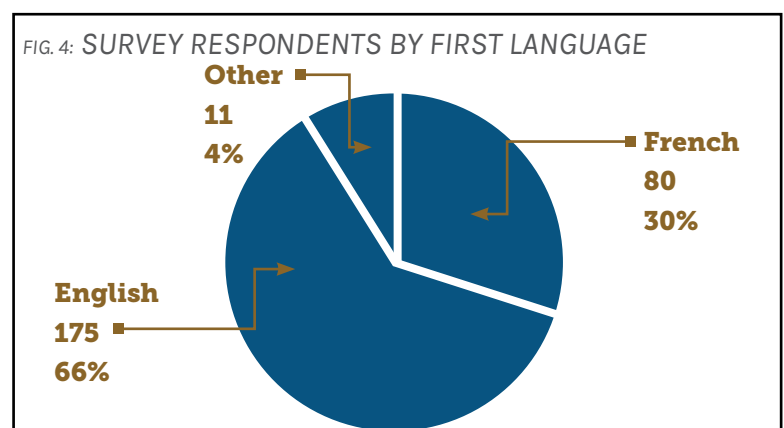
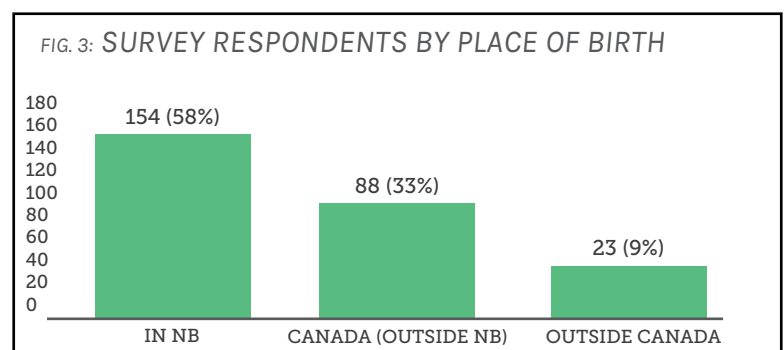
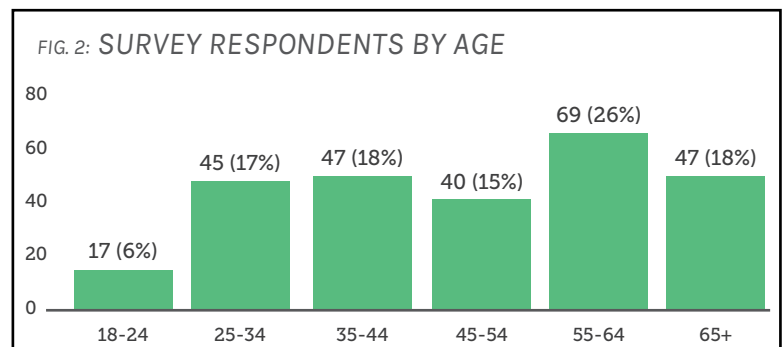
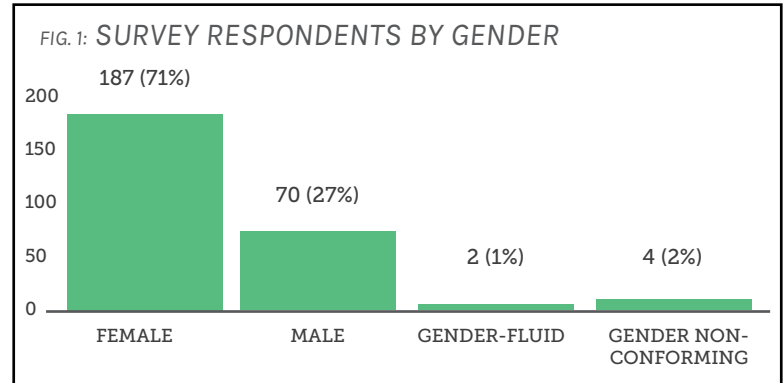
The age distribution of the artists completing the survey was similar to the provincial population overall, with 44 percent over the age of 55 and only 23 percent under the age of 35.

PLACE OF BIRTH AND CURRENT RESIDENCE

Nearly 58 percent of respondents were born in New Brunswick, 33 percent were born elsewhere in Canada, and 9 percent were born outside of Canada. Fredericton is the top cited current residence with 58 artists living in the capital city. Thirty-nine are living in Moncton and 33 in Saint John. Adding in the outlying communities around Saint John (Rothesay, etc.) the number rises to over 50. The Acadian Peninsula (including Bathurst) is home to 19 respondents. Seven respondents live in Sackville and more than a dozen live in northwestern New Brunswick.

LANGUAGES

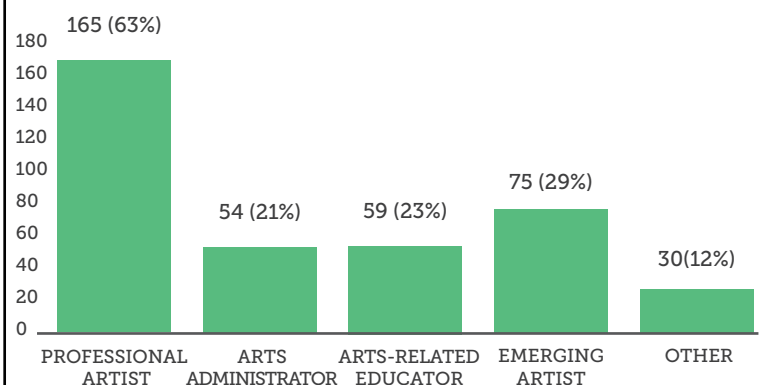
Artists with English as their mother-tongue accounted for 66 percent of respondents while those with French as their first language made up 30 percent. Overall, 122 (46 percent) respondents were bilingual (speaking French and English). Among those with English as their first language, 40 percent also speak French. Among those with French as their first language, 85 percent also speak English. Around 30 respondents speak a third language. Ten speak German, six Spanish and four Japanese. Seven other languages were mentioned.



ROLE AS AN ARTIST

The respondents were asked to identify their primary artistic discipline: professional artist, arts administrator, arts-related educator, emerging artist, or other arts professional. The respondents could choose more than one answer (e.g. they could be an emerging artist and an arts-related educator). The majority of respondents define themselves as professional artists (63 percent) followed by emerging artists (29 percent), educators (23 percent), and arts administrators (21 percent). Among the "other" category, frequent responses included arts-related business owner, musician, and writer.

FIG. 5: ROLE AS AN ARTIST

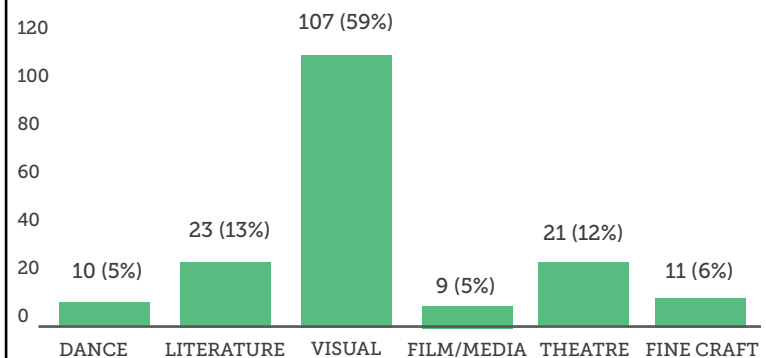


PRIMARY ARTISTIC DISCIPLINE

Respondents were asked to select from three main artistic disciplines: creative arts, performing arts, or general creative industries. Nearly 70 percent of 242 respondents indicated they were in creative arts, while 59 (24 percent) said they were in performing arts and 6 percent (15) were in the general creative industries category.

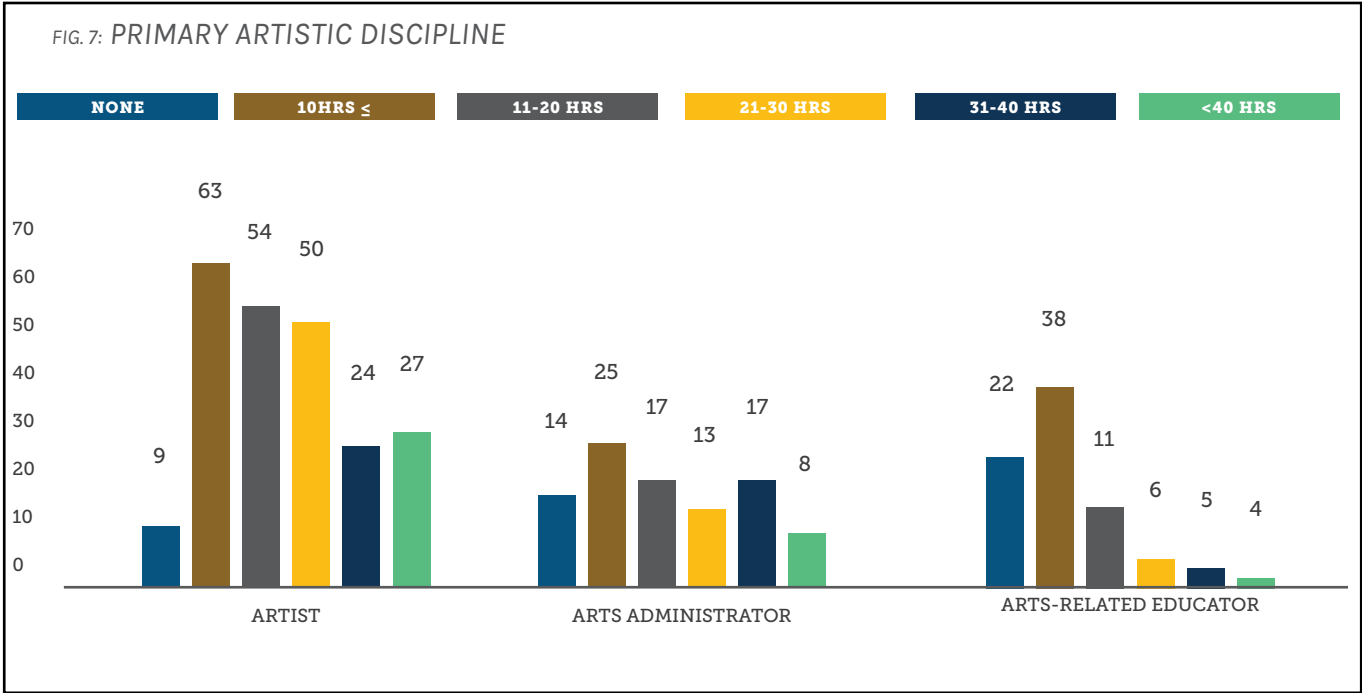
When asked to be more specific about their discipline, the top response, by a wide margin, was visual arts, followed by literature/writing, theatre, fine craft, and dance.

FIG. 6: PRIMARY ARTISTIC DISCIPLINE



TIME SPENT ON ARTISTIC ENDEAVOURS

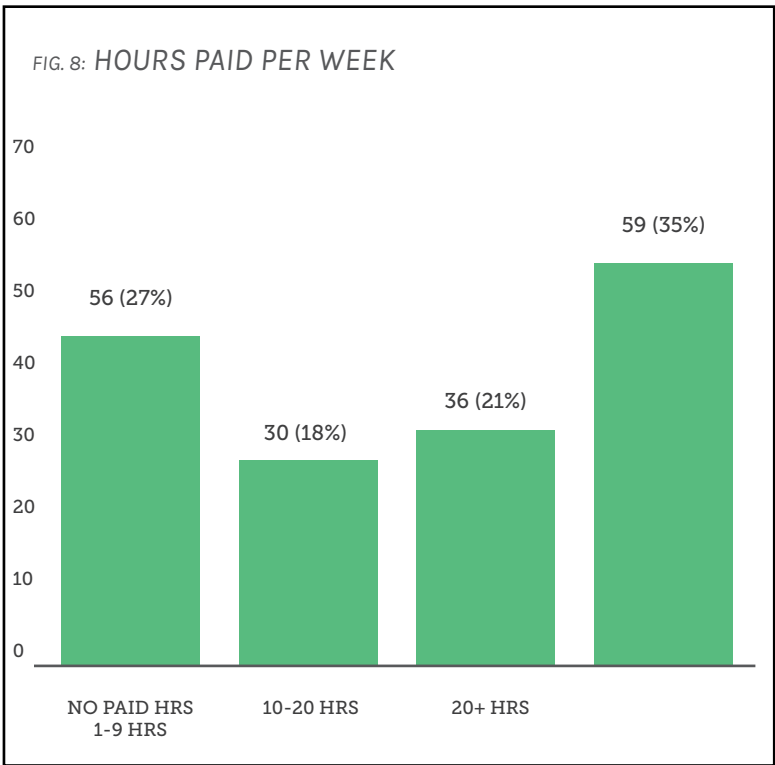
Respondents were asked to estimate how much time they spent per week within these categories of artistic endeavour: practising their art, arts-related administration, and arts-related teaching and training. In total, there were 227 responses to this question. Of those, only 23 percent spent more than 30 hours per week working on their art. Twenty-eight percent spent 10 or fewer hours per week and 46 percent spent between 11 to 30 hours per week. Among the 94 respondents with some arts administration related activity, 25 percent spent 30 hours or more on this activity. Among the 86 involved in arts-related education, most spent fewer than 10 hours per week on this activity.



PAID AND UNPAID WORK

Respondents were asked how many of hours of their arts-related activities per week they were paid for. Only 171 people responded to this question. Of this group, 35 percent were paid for at least 20 hours per week, while 27 percent received no formal pay for their work. Despite not receiving formal pay, 46 percent said that this unpaid creative work ultimately led to income.

The respondents were also asked how much time they spent per week on “invisible work”: unpaid creative work, such as development of new projects, creation of new artwork, unpaid rehearsals, networking, promotion, etc. Over half (51 percent) spent 10 to 20 hours per week on this invisible work. Only 3 percent reported no hours spent on invisible work.



INVISIBLE WORK

Survey respondents were asked to describe the kind of invisible work they were involved in on a weekly basis. There were 190 responses which can be grouped into the following six categories:

- Creation of new artwork
- Grant writing/applications
- Marketing and promotional activities
- Volunteering and board activity
- Research
- Networking and community building

When asked how much of their annual income was generated through invisible work, many respondents did not have an answer. Of the 183 who did answer, 57 responded they generated no income from invisible work, another 60 said they generated less than 50 percent and a small number stated they earned more than 50 percent, of their income from invisible work.

YEARS PRACTICING ART

Respondents were asked how many years they have been practising as an art professional. Over 40 percent had been practising for more than 20 years, while 37 percent had practised for less than 10 years.

FIG. 9: HOURS SPENT ON UNPAID CREATIVE WORK

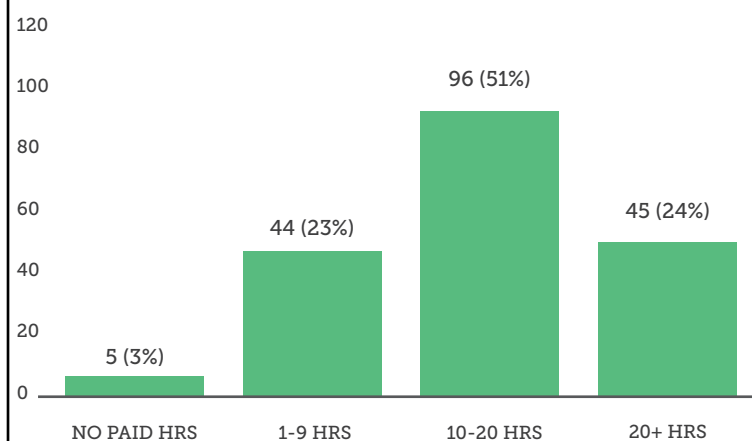
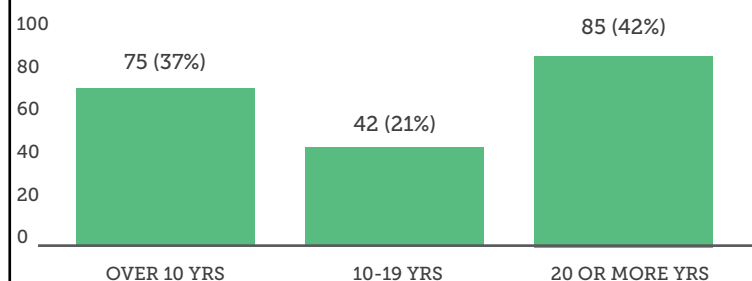
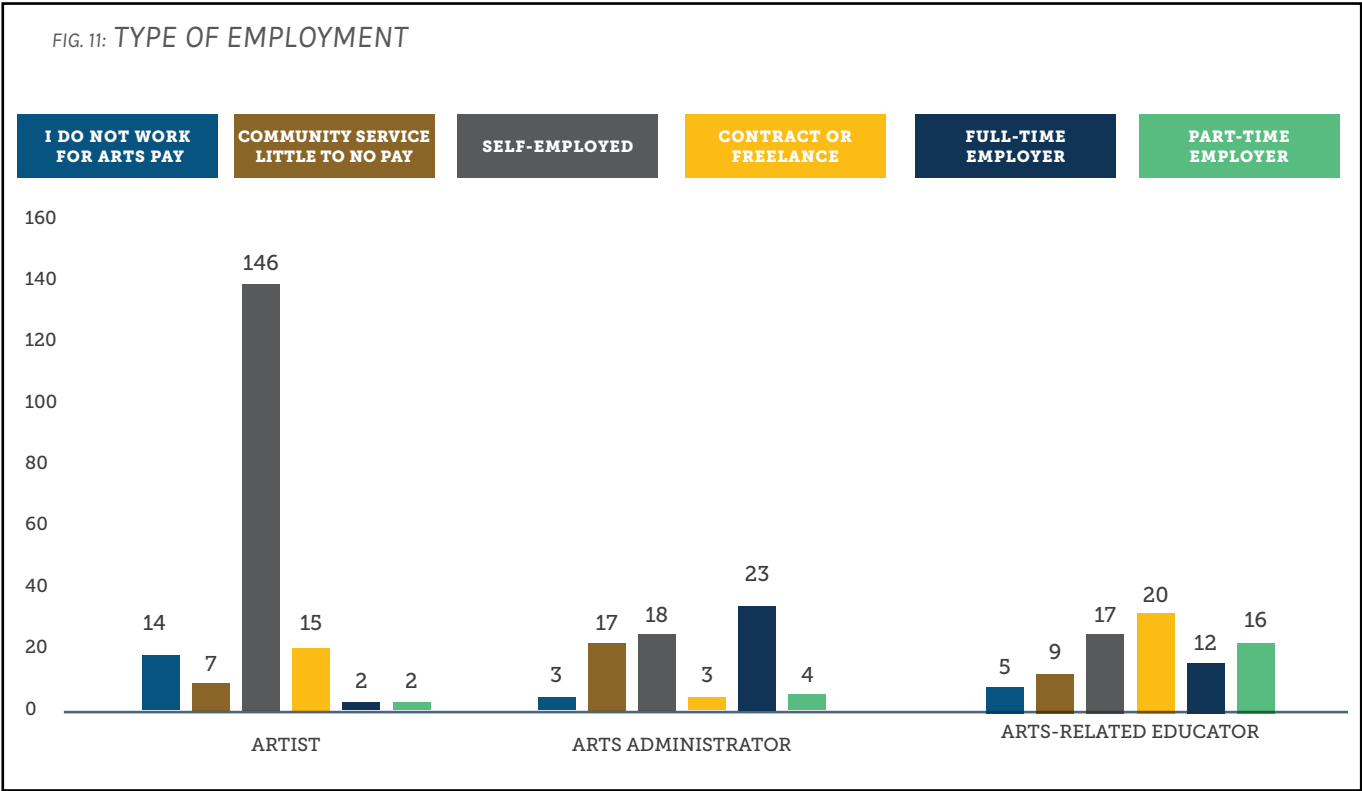


FIG. 10: YEARS SPENT AS AN ART PROFESSIONAL



TYPE OF EMPLOYMENT

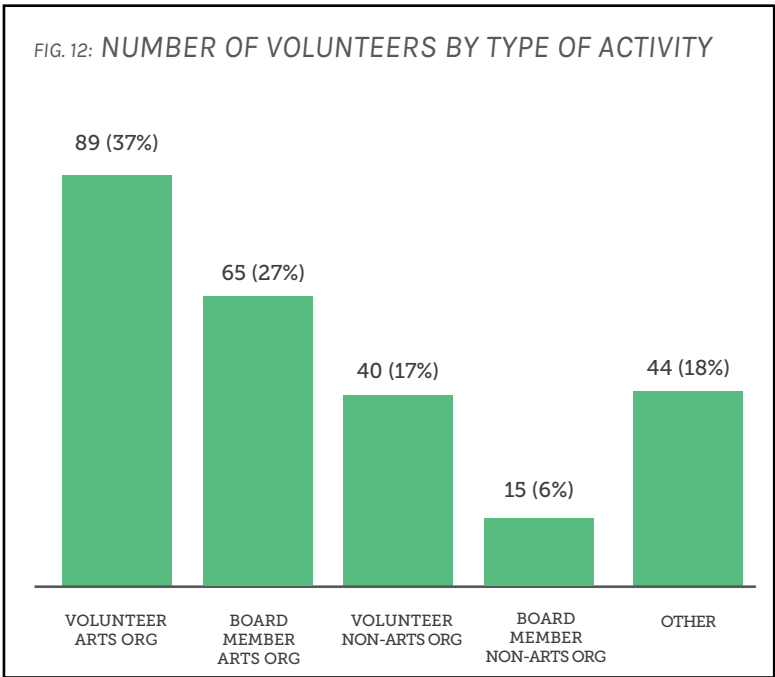
Respondents were asked to indicate their employment situation in specific relation to their artistic endeavours. The vast majority of the 186 professional artists who responded were self-employed, a few were contract or freelance workers, and approximately 8 percent did not generate income from their art. Among the 68 working in arts administration, 34 percent worked full-time for an employer, 26 percent were self-employed, and 25 percent “worked in service to my community or cultural tradition with little or no pay”. Of the 79 respondents involved in arts-related education, 25 percent were contract or freelance employees, 22 percent were self-employed, and 20 percent worked part-time for an employer.



VOLUNTEERISM

Some individuals contribute their skills as arts professionals to volunteer work in the community. Respondents were asked to indicate if and how they volunteer in the community. A number of respondents were involved in multiple volunteer activities. However, more than 40 percent of survey respondents did not answer this question. Responses to subsequent questions suggest that they are not volunteering.

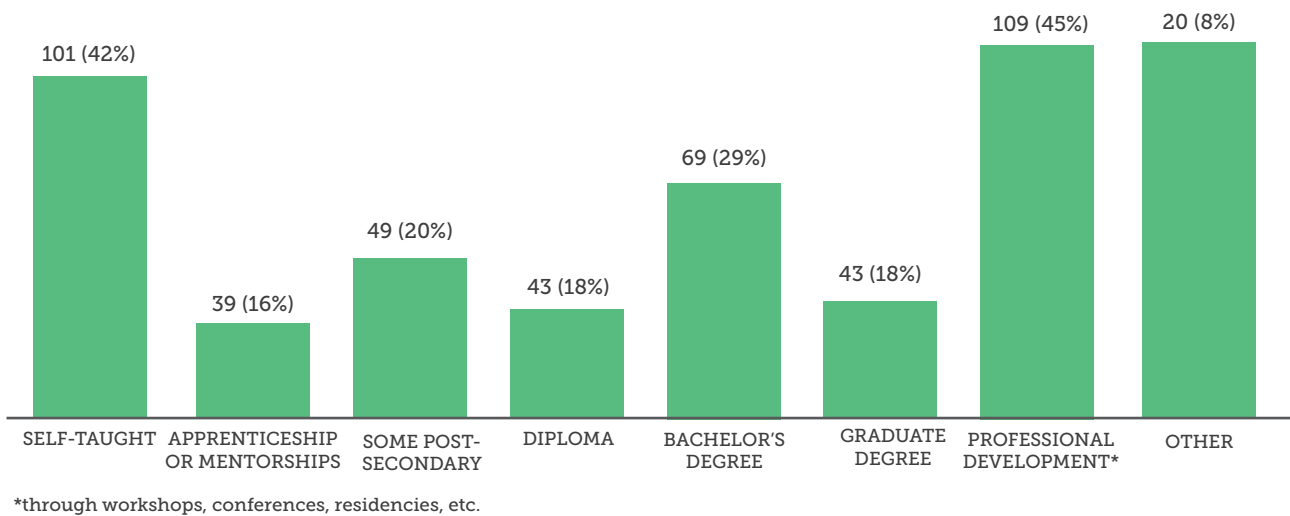
Among those who are involved in volunteer work, the largest number are involved in arts organizations either as a volunteer or board member. Only relatively few, roughly 20 percent, are volunteers or board members for non-arts related organizations. Under the “other” category, most of the respondents discussed ad hoc volunteer efforts rather than involvement on a specific board. Some are involved in teaching.



TRAINING ACTIVITIES

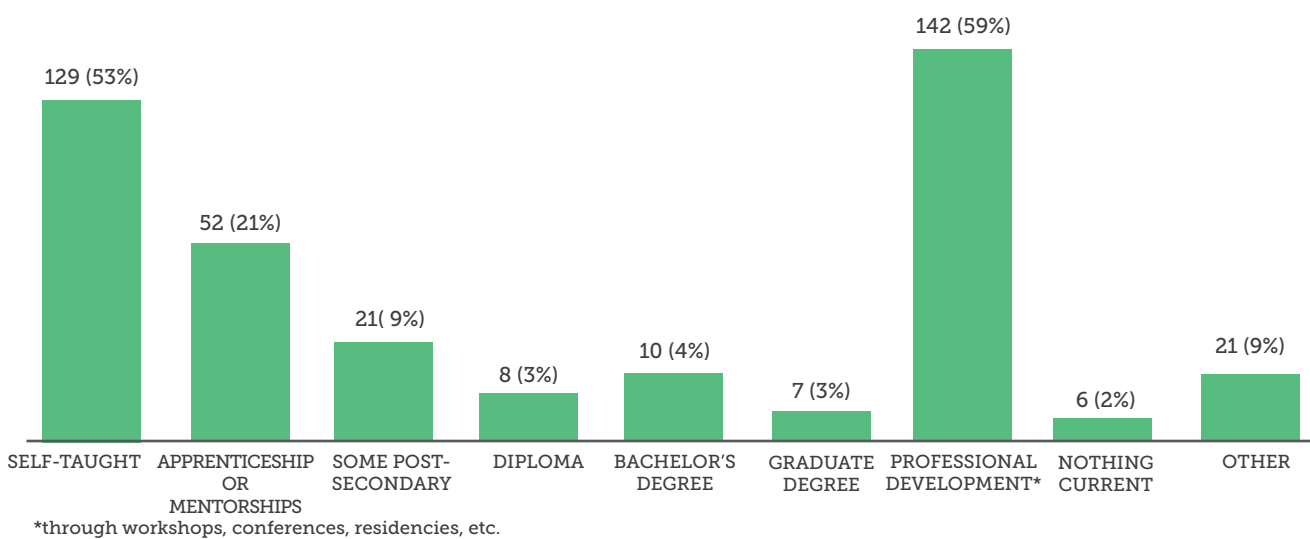
The respondents were asked to indicate how they learned to practise their art (primary training). The top response was professional development through workshops, conferences, and residencies, with 109 people receiving training this way. However, over 100 respondents indicated they were self-taught. Sixty-nine received a bachelor's degree in an arts-related discipline while another 42 received an art-related college diploma. Forty-three have a graduate degree in an arts-related discipline. Thirty-nine received their primary training from apprenticeships or mentorship.

FIG. 13: WHERE ACCESSED PRIMARY ARTS-RELATED TRAINING



The respondents were also asked to describe formal efforts towards ongoing development of their arts career. Most engage in professional development to advance their arts-related training. Many artists were involved in self-teaching and a smaller number were involved in formal post-secondary education.

FIG. 14: WHERE ACCESSED ONGOING ARTS-RELATED DEVELOPMENT



INCOME LEVELS

Respondents were asked to estimate their total gross individual income (from all sources) during 2018. Of the 198 responses to this question, 66 percent reported total income of less than \$35,000 per year and only 6 percent reported income of \$75,000 or more.

The respondents were also asked to estimate what percentage of their annual income was generated from arts related sources. Only 53 people, or 27 percent of the total, earned all of their income from arts-related sources, whereas 85 received less than 25 percent of their total income from arts-related sources (43 percent).

Respondents were also asked if they received employment insurance benefits at any point during 2018. Only 9 percent of respondents to this question indicated they received employment insurance payments at some point in 2018.

PLACES ARTISTS WORK

Over half of the survey respondents reported working on their art from home (55 percent) while 15 percent worked from rented space and 11 percent shared space with other artists. Nearly two out of five responded 'other' to this question, writing in that they worked outdoors, in public spaces, in educational institutions or in their formal place of work.

COMMUTING TO WORK

Commuting isn't much of a challenge for most of the survey respondents. When asked how long the commute to their artistic space is, only 13 percent said that they have a daily commute of 20 minutes or more (one way). The rest either work from home or have a commute of less than 20 minutes.

FIG. 15: BREAKDOWN OF RESPONDENTS BY ANNUAL INCOME IN 2018 FROM ALL SOURCES

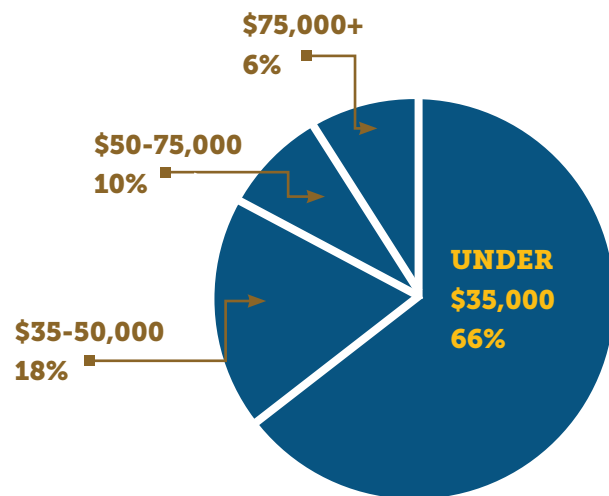


FIG. 16: BREAKDOWN OF RESPONDENTS BY SHARE OF ANNUAL INCOME FROM ARTS-RELATED SOURCES

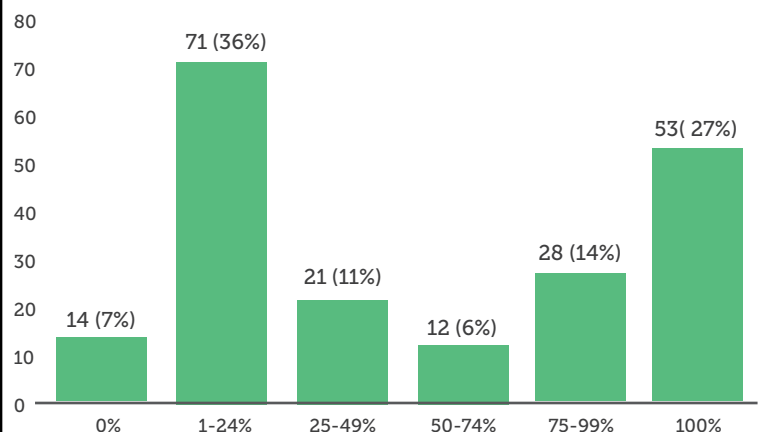
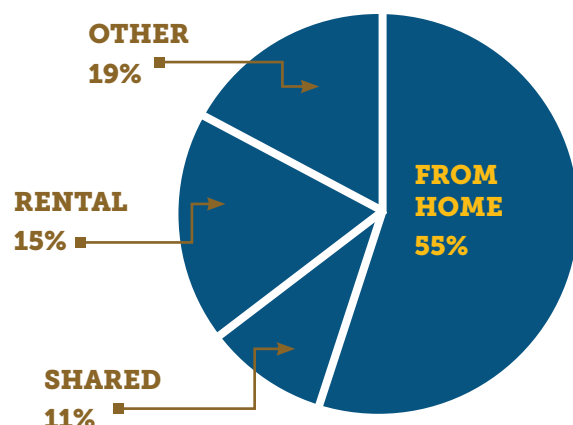


FIG. 17: BREAKDOWN OF RESPONDENTS BY WORK LOCATION



SHOWING/PERFORMING ART

When asked how often they show or perform their art, the top response was continuously (meaning their art is on display at a gallery, retail outlet, or online). Seventeen percent indicated "other", with the top responses being "never", occasionally, online only, and more than five times per year.

Respondents were also asked where they exhibit or perform their art. The top response was non-profit arts organization (82 responses), online (74 responses), in a private venue, gallery, or retail outlet (52 responses), or in a community theatre (20 responses). Eighty-eight people wrote in their answer and the top responses were commercial gallery(ies), festivals, churches, craft shows/markets, rented spaces, and restaurants.

GENERATING REVENUE: GEOGRAPHIC MARKETS

The primary market for generating revenue related to arts endeavours is the local community, followed by elsewhere in New Brunswick, elsewhere in Canada, and internationally. Sixty percent of artists revenue generating revenue in markets outside New Brunswick (export revenue). Under "other", most of the responses stated they not generating revenue yet or the fact they are selling online only.

GOVERNMENT OR PHILANTHROPIC SUPPORT

The survey respondents were asked whether they have applied for public or private grants. They were also asked to provide their observations about the process. The top source for funding applications for this group of artists has been artsnb (90), followed by the Canada Council for the Arts (64), the provincial government: Department of Tourism Heritage and Culture, and the Sheila Hugh Mackay Foundation. Under "other," most of the responses were from artists that had not yet applied for funding.

FIG. 18: SHOWING OR PERFORMING ART, TIMES PER YEAR (% OF THE TOTAL)

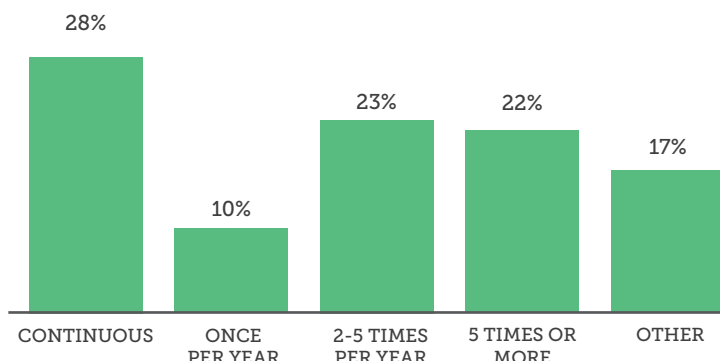


FIG. 19: GENERATING REVENUE

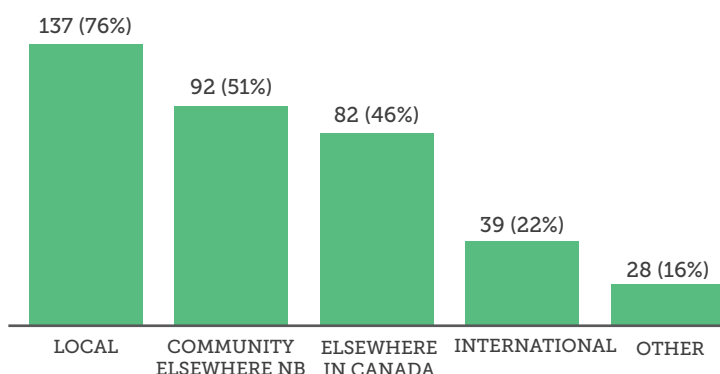
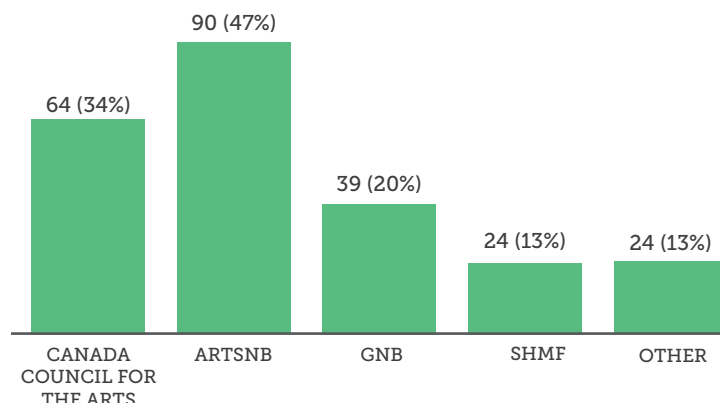


FIG. 20: SOURCES OF FINANCIAL SUPPORT, NUMBER OF RESPONSES



The survey respondents were also asked to describe what they perceive the barriers to being awarded grants or funding for their projects. There were 135 people who took the time to write out a response to this question. While the answers were varied, they can be grouped into seven broad categories:

Lengthy process: many felt it was too onerous a process to apply for funding.

Perception of eligibility: a considerable number of responses related to the concern that they would not be eligible for funding.

Time: at least a couple of dozen responses were related to the concern that if they take the time to apply they will likely not get funding. A number stated there is not enough money available.

Difficult process: A number of respondents said they found the application process challenging and gathering the needed information onerous.

Finding opportunities: a smaller but still significant number of respondents said they didn't know where to look.

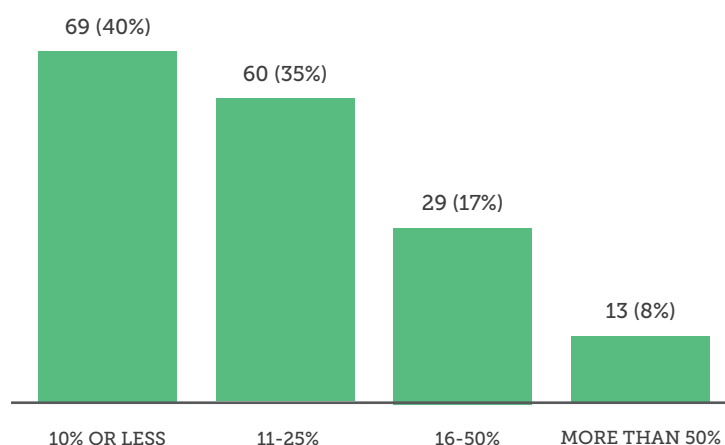
Professionalization: Around a dozen respondents indicated they would not be eligible because they did not have the proper training or education.

Desire for support: a few suggested they did not need the support, mainly because they were already working another job.

TIME SPENT EACH WEEK ON BUSINESS-RELATED ACTIVITIES

Being a professional artist includes many business activities such as acquiring materials, logistics (i.e. booking rehearsal space, coordinating schedules), as well as the actual creation of the art. It often includes other business-related tasks such as bookkeeping, grant applications, and marketing. Survey respondents were asked to estimate how much time per week they spend on business-related activities. Twenty-five percent of respondents spend at least a quarter of their time on business activities while the majority of respondents spend less. The top response was that business-related activities take less than 10 percent of their time each week.

FIG.21: TIME SPENT EACH WEEK ON BUSINESS-RELATED ACTIVITIES (% OF TOTAL WORK TIME)



MAIN ADVANTAGES OF BEING AN ARTIST IN NEW BRUNSWICK

151 people responded to the question about the main advantages of being an artist in New Brunswick. Their responses reflected the following key themes:

Community: many respondents felt there is a strong community of support around them. This includes accessible networks.

Small size: many people indicated the small size of the province was a big advantage.

Cost of living: mentioned by many respondents.

Beauty of the place: a number of people remarked on the natural beauty of New Brunswick.

Bilingualism: a few people indicated this was a main advantage.

MAIN DISADVANTAGES OF BEING AN ARTIST IN NEW BRUNSWICK

When asked what they consider the main disadvantages of being an artist in New Brunswick, a number of patterns emerged. There were 165 responses to this question. Some responses were quite lengthy. The key themes were as follows:

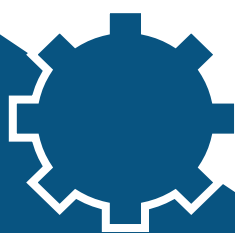
Lack of market: the majority of respondents expressed concern about the small market for art and the unwillingness of New Brunswickers to invest in art. Performance artists, have a similar concern, the lack of population for audiences.

Isolation: distance from major markets and challenges developing markets outside New Brunswick.

Opportunities: lack of galleries and opportunities for dissemination of art.

Funding: less financial support available than in larger urban centres.

Economy: weak financial outlook for New Brunswick.



SUPPORTING THE ARTS COMMUNITY

Respondents were asked for insight into what kind of support would contribute to strengthening the arts community in New Brunswick. There were 144 responses to this question and the ideas can be grouped into a few themes:

Funding: this was the top issue — nearly two-thirds of respondents believed that more funding will help bolster the arts community in New Brunswick. Because of the distance from markets, some believe support for things like travel and online marketing will help. Others believe that provincial grants for artistic creation are not plentiful enough.

Promotion: support for marketing outside New Brunswick. This is partially an issue of funding but also more broadly how the quotion of stakeholders can work together to promote New Brunswick art and artists outside the province.

Training: developing skills relating to business and marketing principles, grant applications, etc. For many artists, this remains a challenge. Artistic creation is their main endeavour but they struggle with the business side, particularly in areas such as marketing, sales and accessing grants and funding but also in more basic ones such as financial management, time management, and CRA reporting.

Mentorship: support for a variety of networking opportunities. A number of respondents would like to see more interaction between artists in the form of mentorship and avenues for networking.

Social protections: the lack of quality childcare services was mentioned by six respondents.

Other interesting responses included a focus on municipal public art policies, efforts to attract more artists to New Brunswick (including repatriation), and more writing about the arts in local media.

TRAINING AND DEVELOPMENT

Respondents were asked to indicate the types of training they would benefit from. There were 125 responses to this question. Most of them can be grouped into the following five categories:

Marketing: this was a key theme throughout the survey. A significant share of the artists responding to the survey are already actively selling outside the province but there is as belief that more could be done to support individual artists and collectives in their efforts to sell outside New Brunswick .

Grant application development: another common theme throughout the survey, many respondents continue to feel frustrated with the process of grant writing and with the criteria attached to many programs.

Opportunity seeking: a number of respondents indicated a lack of knowledge as to where they are supposed to look for funding. Beyond the main programs and funders, are there secondary sources?

Business skills development: as revealed in this survey, artists spend considerable time on business activity, and many would like more training in how to do this effectively and efficiently.

Digital publishing/online promotion: how do artists promote themselves online? It's one thing to get online, it's another to effectively sell online.



PROFESSIONAL ORGANIZATION MEMBERSHIP

Respondents were asked to list their affiliation to professional organizations including ArtsLink NB, AAAPNB, CARFAC, and UDA. Additional organizations could be added. Over 80 were members of ArtsLink NB, 41 AAAPNB, and 24 CARFAC. In addition, there were 80 involved with other professional organizations (Note: they could indicated affiliation to more than one entity). There were over 60 different organizations mentioned as listed in Fig. 23. These can be grouped into three categories: subject matter-focused (e.g. Writers Federation of N.B.), geographically-focused (e.g. Bathurst Art Society), or other (e.g. New Brunswick Teachers Association).

FIG. 22: NUMBER OF RESPONDENTS BY MEMBERSHIP IN PROFESSIONAL ORGANIZATIONS

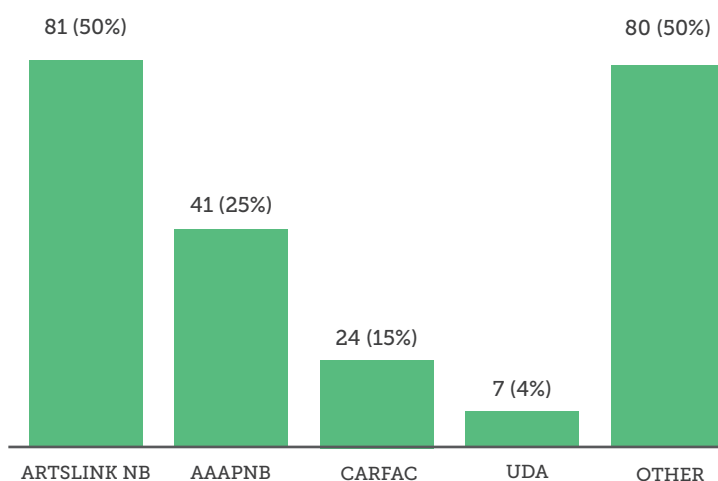


FIG. 23: PROFESSIONAL ORGANIZATIONS WITH MEMBERS AMONG THE SURVEY RESPONDENTS

AAOF (Association des auteurs de l'Ontario French)	Playwrights Guild of Canada
Guild of Canadian Weavers	CNB
ACTRA	Regroupement Quebecois de la Dance
Handweavers Guild of America	Complex Weavers
ADAC	ResArtis
International Symbolists Art Guild	Connexion ARC
ATTSNB	RQD
ISA	Craft NB
Bathurst Art Society	Saint John Art Club
League of Canadian Poets	Craft Nova Scotia
CADAC	SARTeC
Literary Translators' Association of Canada	CSPWC
Canada Book Centre	SCBWI
Maine Arts Commission	CulturePlus
Canadian Actors' Equity Association	Silverfish
Miramichi Art Core	ECMA
Canadian Creative Writers and Writing Programs	Society of Canadian Artists
Music New Brunswick	FAA
Canadian Society of Painters in Water Colour	Third Space
NB Crafts Council	FAN
CANSCAIP	TWUC
NBRMTA	Federation of Canadian Artists
Carfac	UNEQ
New Brunswick Filmmaker's Cooperative	Fiber Arts Network
centre culturel Aberdeen	V-Tape
New Brunswick Teachers Association	Fredericton Arts Alliance
CFM	Writers Federation of N.B.
PARC	FRIC
CHRC	Writers Federation of N.S.
Playwright Atlantic Resource Centre	Galerie Restigouche Gallery
CMS	Writers Union of Canada

POLICIES TO SUPPORT ARTISTS AND THEIR DEVELOPMENT

The last question on the survey was meant to gather insight on how artists could be supported in New Brunswick. The specific question asked was: "Do you have any thoughts on policies or initiatives that could be put in place to support artists and their development in New Brunswick?"

There were 103 responses to this question and the ideas varied widely from specifics such as "enhancements to the current ArtsLink newsletter", to more general suggestions such as "promoting arts education". Grouping these notes into broader themes results in six areas for consideration:



Enhanced funding support: this was a common theme throughout the survey. There was a particular focus on the need to support travel costs.

Training and development opportunities: efforts to increase the professionalism of the sector. This involves more training, networking, and collective actions.

Awareness and marketing: promoting the value of the arts sector to New Brunswickers. A number of artists would like to see more public awareness of art, the arts community, and their inherent value to New Brunswickers.

Social protections: the cost of living. Several discussed this issue included suggestions such as making employment insurance (EI) more accessible to professional artists, not clawing back public pension benefits for artists that generates revenue, and providing access to health insurance, etc.

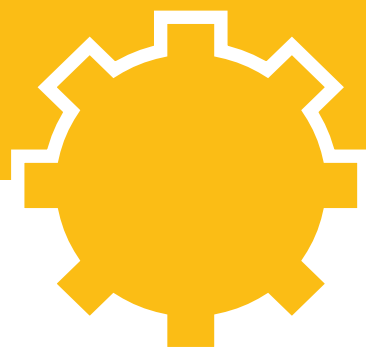
Art in the public sphere: use public art and art in schools as a way to build the market for local artists and raise awareness of the local arts community.

Support local festivals around the province to exhibit and promote art.



REFERENCE:

SOURCE:	DESCRIPTION:
Statistics Canada: 2006 and 2016 Census	Employment by occupation, employment by industry, median and average income by occupation, class of worker, work during the year, migration, immigration, mobility.
Statistics Canada: Table 36-10-0452-01	Culture and sport indicators by domain and sub-domain. Includes output, GDP and other indicators by detailed sub-domain.
Statistics Canada: Table 12-10-0101-01	Inter-provincial and international trade flows, basic prices, detail level.
Statistics Canada: Table 21-10-0189-01	Performing arts, sources of public sector grants, not-for-profit.
Statistics Canada : Labour Force Survey	Holders of two or more jobs, average weekly wages.
Statistics Canada: Table 36-10-0402-01	Gross domestic product by industry and year (2012 chained dollars).
Statistics Canada: Table 36-10-0595-01	Input-output multipliers, provincial and territorial, detail level.
Statistics Canada business counts	Business locations by province and municipality by detailed NAICS industry and employment size, December 2018.
Government of Canada Survey of Heritage Institutions (2017)	Government funding for heritage institutions by year and province.
Canada Council for the Arts Research: Stats and Stories	Detailed funding tables, support for artists and institutions by province.
Jupia Consultants Inc. survey of New Brunswick artists	Conducted in English and French between July and September 2019.



artsLinkNB

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