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Artists and Arts Organizations in Northern Manitoba: A Baseline Study

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Highlights of Findings

- **Through an outreach-based snowball methodology, the ImagiNorthern Survey reached**
  - 282 artists across Northern Manitoba and across arts and creative disciplines.
  - 27 arts organization with about 123 employees dedicated to artistic work.
  - Based on an estimate of artists and cultural workers, extrapolating from 2016 Arts and Cultural Worker data for Manitoba and the 2021 Census, this survey reached a considerable proportion of both artists and cultural workers and included a large proportion of hobbyists and aspiring professional artists.
- **76.5% of the population is Indigenous.**
  - Indigenous communities are much younger, with a median age around 23 to 25 years, while some of the towns are much older with a median age round 44 years.
  - The economic situation in Northern Manitoba varies greatly by where people live and under which circumstances: Indigenous people living on Reserves have much less income and lower levels of employment income than non-Indigenous people living in the towns.
- **Artistic activity across Northern Manitoba is as varied as anywhere else.**
  - Despite the remoteness and vast size of Northern Manitoba there are also many connections between artists and arts organizations; yet the opportunities to make a solid living from the arts is more limited than in urban centres like Winnipeg.

Highlights of Findings

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- **Levels of practice**
  - The majority of artists and makers in the survey are hobbyists (66%) – while some sell their products, few do so as a fully-fledged business.
  - Aspiring professional artists make up 24% of respondents, professional artists 21% and those with a community arts practice make up 13%. In terms of self-identification there is some overlap between categories.
- **Arts income is earned by relatively few artists and makers**
  - About half report not being employed in the arts, i.e. the arts are a hobby, and 47% report only themselves as having employment income.
  - Only 15% report earning more than 50% of their total income from the arts.
  - Most artists and makers operate their arts practice as sole proprietors
  - About 12% of total Household income comes from the arts practice
- **42% are teaching artists at all levels of practice**
  - 40% receive no pay at all from teaching
  - 13% earn more than half of their arts income from teaching
- **21% report working at least 20 hours a week on their arts practice**
  - It is clear: the arts and craft sectors generate much of their value from unpaid work

Highlights of Findings

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- **We examined where artists and makers purchase supplies and where they sell their products and experiences.**
- **The survey showed that the proportion of supply purchases from outside Northern Manitoba makes up 66% of all purchases, while local supply makes up about 23%.**
- **But in terms of sales, artists and makers reported that they sell about half of their products in Northern Manitoba and half outside of the region in Manitoba, across Canada and internationally.**
  - The current dynamic where artists and craft makers bring in more supply from outside the region, add value by creating product locally and then sell finished product roughly equally within the region and outside of it appears to generate lower local economic impact for the North than sourcing locally, adding value through production locally and selling outside of Northern Manitoba would, as long as the cost of getting product to outside market is not prohibitive. Finding ways to shift this balance may be a viable public policy direction as part of Northern economic development policy, supporting local artists and makers and building up the arts eco-system.
  - The survey did not collect $ value information which limits its ability to quantify economic impact more specifically.

Highlights of Findings

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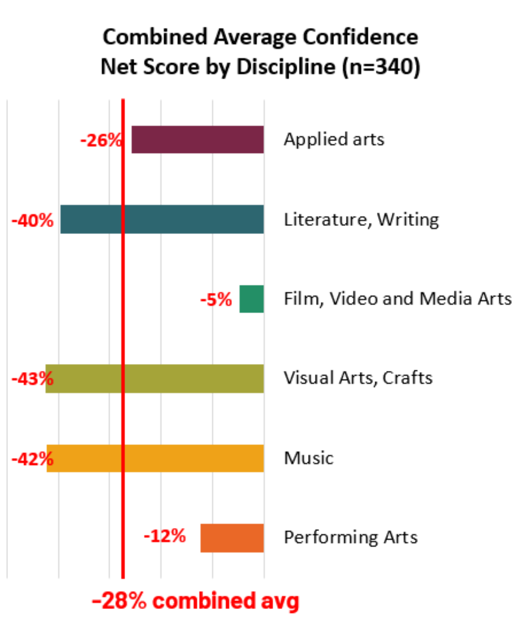
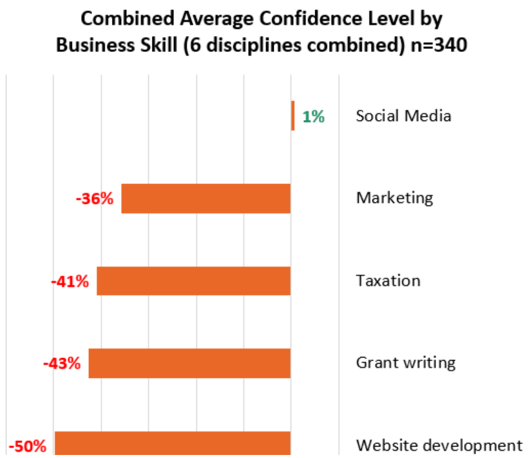
- **Arts training has been mostly informal.**
  - On average artists and makers report 3 modes of training they have used.
  - 88% say they would benefit from more training in their arts or craft practice and 71% say they would benefit from training in business skills.
- **By discipline, the survey revealed a great lack of confidence in business skills and skills related to the artistic eco-system.**
  - There are consistent weaknesses that cut across all disciplines like web development, digital marketing, marketing, online stores that could be considered for both training and for the development of shared services offered by a central organization to individual artists and groups.
  - There are also discipline-specific skills where training and development opportunities may require novel approaches to break through issues of very small number of potential trainees as well as the remoteness of where they live.





Highlights of Findings

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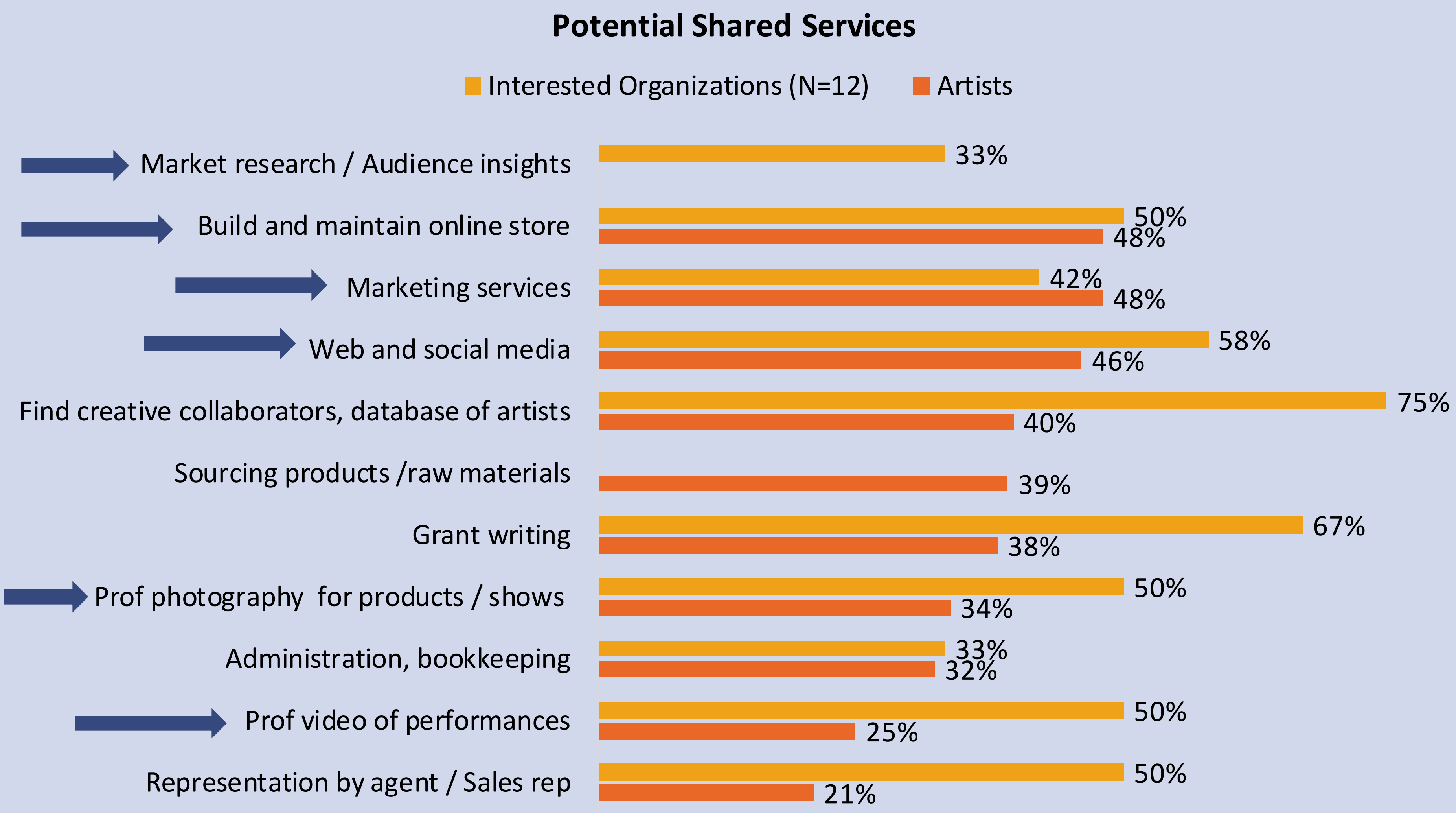

Artists at every level of practice – professional, aspiring and hobbyist – experience a large number of barriers to building their practice successfully.

The top 4 barriers are:

1. Lack of time to work on their art
2. Access, availability or affordability of raw materials
3. Lack of funds to invest
4. Distance/ travel
5. Lack of pro dev locally

The geographic disadvantage of living in a remote Northern region are difficult to overcome without major infrastructure investments; however, other issues related to digital presence, marketing and market access can be considered as a shared services offer to gain effectiveness.

Other shared services around grant writing and financial administration have the potential to allow artists to focus more on their artistic practice. If a method of bulk sourcing raw materials can be established this could make production more affordable.

Setting the Context

Purpose

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- Develop greater understanding of the arts eco-system in Northern Manitoba
- Develop baseline information about who (demographics) is active in which artistic practices where
- Gain a better understanding of professional and recreational artists, as well as those who teach and those organizations that support artists and their artistic endeavours
- Draw on Statistics Canada's Census 2016 and 2021 as well as Hill Strategies' Statistical reports on the arts and cultural sector

Methodology

- **We conducted two online surveys from May 5 to July 26, 2022 using SurveyMonkey**
  - **Mobile optimized application, well suited to remote users**
  - **Included a collector for interviewer-led responses undertaken by champions**
- **Recruitment, using a snowball method, was promoted through email, social media postings, personal outreach by ImagiNorthern partners and champions across Northern Manitoba, including in Churchill, Flin Flon, The Pas, Thompson.**
  - **Arts organizations survey received responses from 27 different arts and related organizations**
  - **Artists' survey received 282 responses across the full spectrum of the arts and across Northern Manitoba**
    - Some did not answer all questions, but as this survey is not a representative survey, we included all in the report. Skip patterns were used to ensure only relevant questions were asked of individual participants. The base number of respondents is reported for each question.
    - Subgroups by discipline and by location were examined and any significant differences are highlighted in this report.

Northern Manitoba

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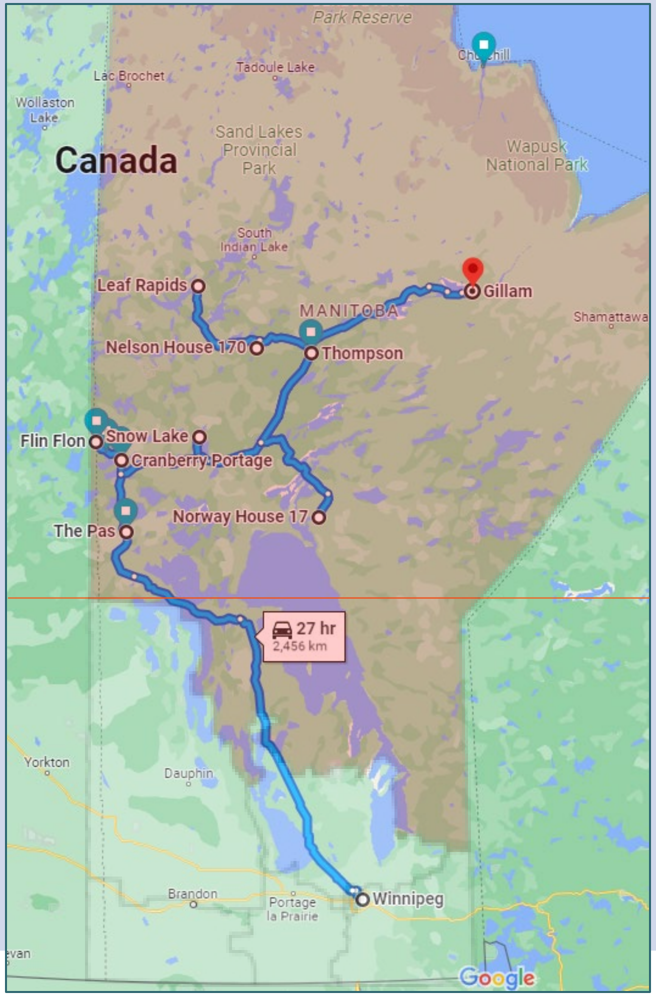
Churchill-Keewatinook Aski Federal Electoral District

494,000 sq km (slightly larger than the Yukon)



This federal electoral district includes all communities in Northern Manitoba. The Census for the federal district was used to understand the population base in which the arts sector operates.

2021 Census

- Northern MB's population has shrunk by 6.5% since 2016, which reduced its proportion of Manitoba's total population from 6.8% to 6.1%.
- 76.5% identify as Indigenous (up from 75% in 2016).
- Northern MB is much younger with a median age of 28.6 (30% 14 or under; 9% over 65), similar to Nunavut, Canada's youngest territory with median age of 25.7, and other predominantly Indigenous communities.
- Median after-tax income is 15% lower than provincial average.
- 16% report an Indigenous Language as Mother Tongue; 29% report knowing an Indigenous language and 7.5% reporting speaking an Indigenous language most often at home (down from 2016 Census with 26% Mother tongue and 16% spoken most often at home).

Census 2021	MB	WPG	C-K Fed Dist
Population 2021	1,342,153	834,678	81,258
Population 2016	1,278,365	783,099	86,908
Population % change	**+5.0%**	**+6.6%**	**- 6.5%**
0 to 14 years	18.8%	16.9%	29.9%
15 to 64 years	64.1%	66.3%	61.1%
65 years and over	17.1%	16.8%	9%
Median age of the population	**38.4 yrs**	**39.2 yrs**	**28.6 yrs**
Indigenous Population	18.2%	12.5%	76.5%
Median after-tax income 2020	$35,200	$35,600	$29,800

Northern Manitoba's economic disadvantage is clear:

- People rely more heavily on government transfers (27.1% vs 18.6% for MB) and COVID income supports (9.4% vs 5.5%).
- 59% had employment income compared to 70% for all MB.

Overall unemployment in Manitoba in July 2022 was only 3.5%.

Note: Not all Indigenous people are counted by the Census, and some data is suppressed in reporting.

Community Portraits Census 2021

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	MB	C-K Fed	Thompson	The Pas	Norway House 17, reserve	Flin Flon	Kelsey	God's Lake 23, reserve	Nelson House 170 pop ctr	Snow Lake, Town	Gillam, Town	Churchill, Town	Cranberry Portage	Norway House	Leaf Rapids, Town	Other communities
Pop 2021	1,342,153	**81,258**	**13,035**	**7,302**	**5,390**	**4,722**	**2,181**	**1,520**	**1,351**	**1,088**	**1,007**	**870**	**608**	**363**	**351**	**41,470**
Pop 2016	1,278,365	**86,908**	13,678	6,402	4,807	4,810	2,419	1,211	1,675	899	1,201	899	771	478	582	47,076
Population % change	**5.0**	**- 6.5**	**-4.7**	**14.1**	**12.1**	**-1.8**	**-9.8**	**25.5**	**- 19.3**	**21.0**	**- 16.2**	**- 3.2**	**- 21.1**	**- 24.1**	**- 39.7**	**-11.9**
0 to 14 yrs	18.8	**29.9**	25.8	22.7	34.8	17.2	18.6	38.8	36.2	20.6	27.7	17.8	17.2	23.6	31.4	25.5
15 to 64 yrs	64.1	**61.1**	66.7	64.5	60	64.1	62.8	56.3	57.9	62.8	68.8	71.8	61.5	69.4	58.6	64.1
65 yrs plus	17.1	**9**	7.4	12.8	5.4	18.6	18.6	4.3	5.9	16.5	3	10.3	21.3	6.9	11.4	10.4
Median age	**38.4**	**28.6**	**31**	**33.6**	**23.6**	**43.2**	**45.2**	**23.6**	**22.8**	**38.4**	**31.2**	**37.6**	**46.4**	**32.8**	**26.6**	**~ 32**
Indigenous population %	18.2%	**76.5%**	45.5%	64.7%	99.2%	22.3%	41%	99.3%	98.7%	27.6%	52.7%	62.7%	53.2%	88%	89.6%	
Median after-tax income 2020	$35,200	**$29,800**	$41,200	$36,800	$23,400	$40,000	$43,200	$21,600	$19,600	$47,200	$52,000	$42,000	$39,600	$37,600	$32,400	

Each community has its own population dynamic:

- Median age ranges from a very young 22.8 years (with only 1 in 17 over 65) to an older 46.4 years (with more than 1 in 5 over 65).
- Youngest and fastest growing communities are Indigenous.
- Most communities have lower population than 5 years ago, some dramatically so, with a loss of over 20% of the population.
- Median after-tax income is lowest for people living on reserves, while the towns tend to exceed MB median.

MB Artists and Cultural Workers, 2016 (Note: Statistics Canada only captures primary occupation)

- 4,300 artists – 2.7% of all artists in Canada
  - 0.67% of provincial work force
  - Extrapolating to Northern MB
    - Multiplying all employment income recipients in Northern MB by this % would mean there could be 248 artists with primary (self) employment in the arts in 2016.
    - Median income of artists in MB was $23,300, in bottom third in Canada.
    - Employment recipients declined by more than 3,000 in 2021 Census

2021 estimate: ~222 artists in Northern MB (no assumptions relate to COVID included)

- 19,600 cultural workers – 3% of all cultural workers in Canada
  - 3% of provincial work force
  - Extrapolating to Northern MB
    - Multiplying all employment recipients in Northern MB by this % would mean there could be 1,108 cultural workers with primary (self) employment in 2016.
    - Median income of cultural workers* in MB was $39,300, in bottom third in Canada
    - Employment recipients declined by more than 3,000 in 2021 Census

2021 estimate: ~996 cultural workers in Northern MB (no assumptions relate to COVID included).

Source: Hill Strategies, Artists in Canada's Provinces and Territories, 2016, published Nov2019

**Cultural workers include natural heritage, museums, libraries as well as arts organizations*

MB Artists and Cultural Workers, 2016

Census only captures primary occupation vs ImagiNorthern survey = all artists

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Composition of Artists, 2016	Canada	MB
Musicians and singers	22%	**30%**
Authors and writers	18%	**16%**
Producers, directors, choreographers, and related occupations	17%	**13%**
Visual artists	13%	**11%**
Artisans and craftspeople	9%	**10%**
Dancers	6%	**8%**
Actors and comedians	7%	**5%**
Other performers	4%	**4%**
Conductors, composers, and arrangers	3%	**2%**
Total artists	**158,000**	**4,300**

ImagiNorthern Survey July 2022	Northern MB
Music	19%
Literature, Writing	12%
Visual Arts, Crafts	76%
Film, Video and Media Arts	7%
Performing Arts	5%
Applied arts (e.g. architecture, design)	4%
Total artists	**274**

Our survey of Northern MB artists (pros and amateurs) showed they are active in all genres. Visual arts and craft people with 76% are a far greater proportion than provincial average, while all other disciplines are lower.

Source: Hill Strategies, Artists in Canada's Provinces and Territories, 2016, published Nov2019

ImagiNorthern Survey Reach is Significant

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Artists	**MB 2016**	**Northern MB 2021 estimate**	**Survey respondents**	**Prof artists**	**Aspiring pros**	**Community practice**	**Hobby**
Artists	4,300	**222**	282	**59**	**68**	35	184
Ratio				**27%**	**57% combo**		
Organization	**MB 2016**	**Northern MB 2021 estimate**	**Arts orgs Employees**	**Total organizations**		**Volunteer only orgs**	
Cultural Workers*	19,600	**996**	**123**	27		38%	
Ratio			**12%**				

Based on the estimate for MB artists and cultural workers, this survey achieved very high participation.
The survey also captured far broader arts activity by including community arts, aspiring professionals, hobbyists and volunteers, all of whom generate economic and social capital return on their investment in time and money in their communities without being paid for their work.

* Cultural workers is a far broader category including natural heritage, museums, libraries as well workers employed by arts organizations; this makes our 12% count of estimated employees significant.

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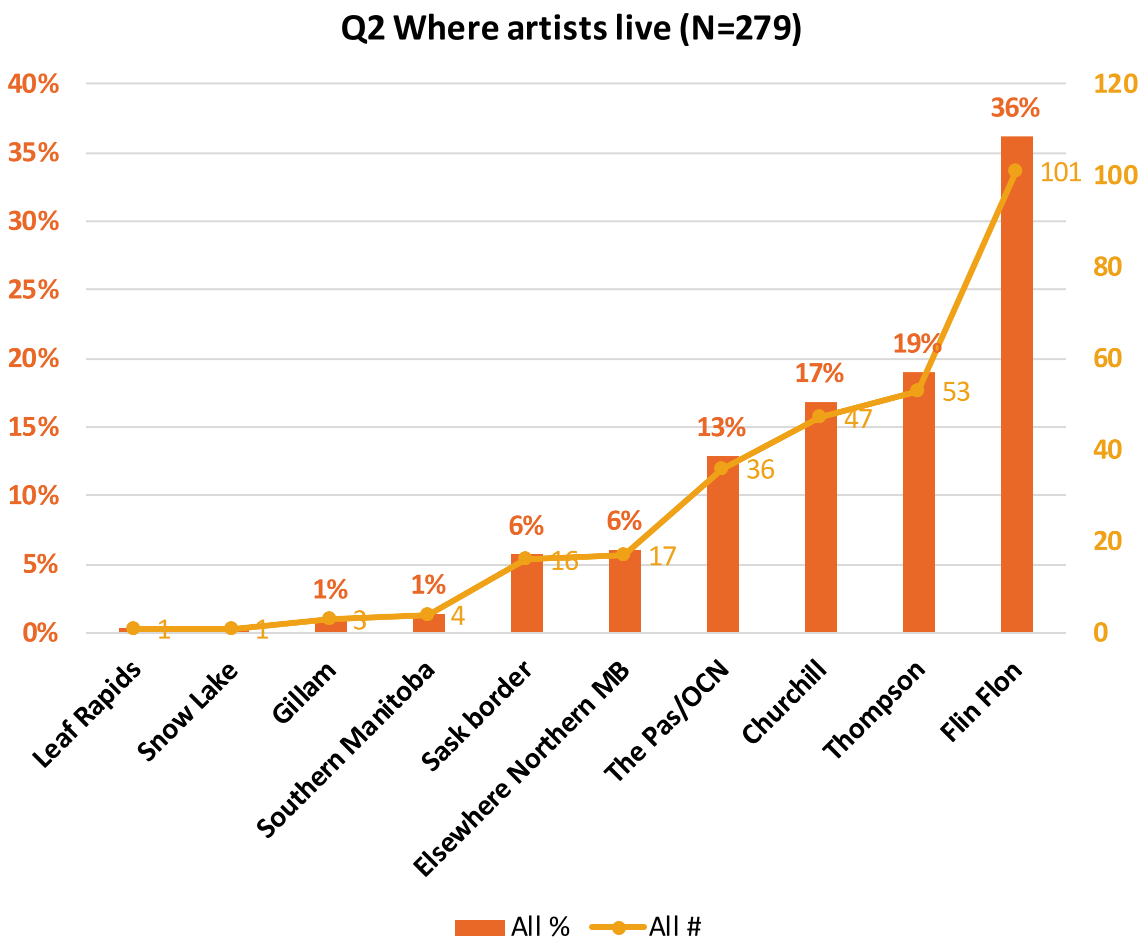
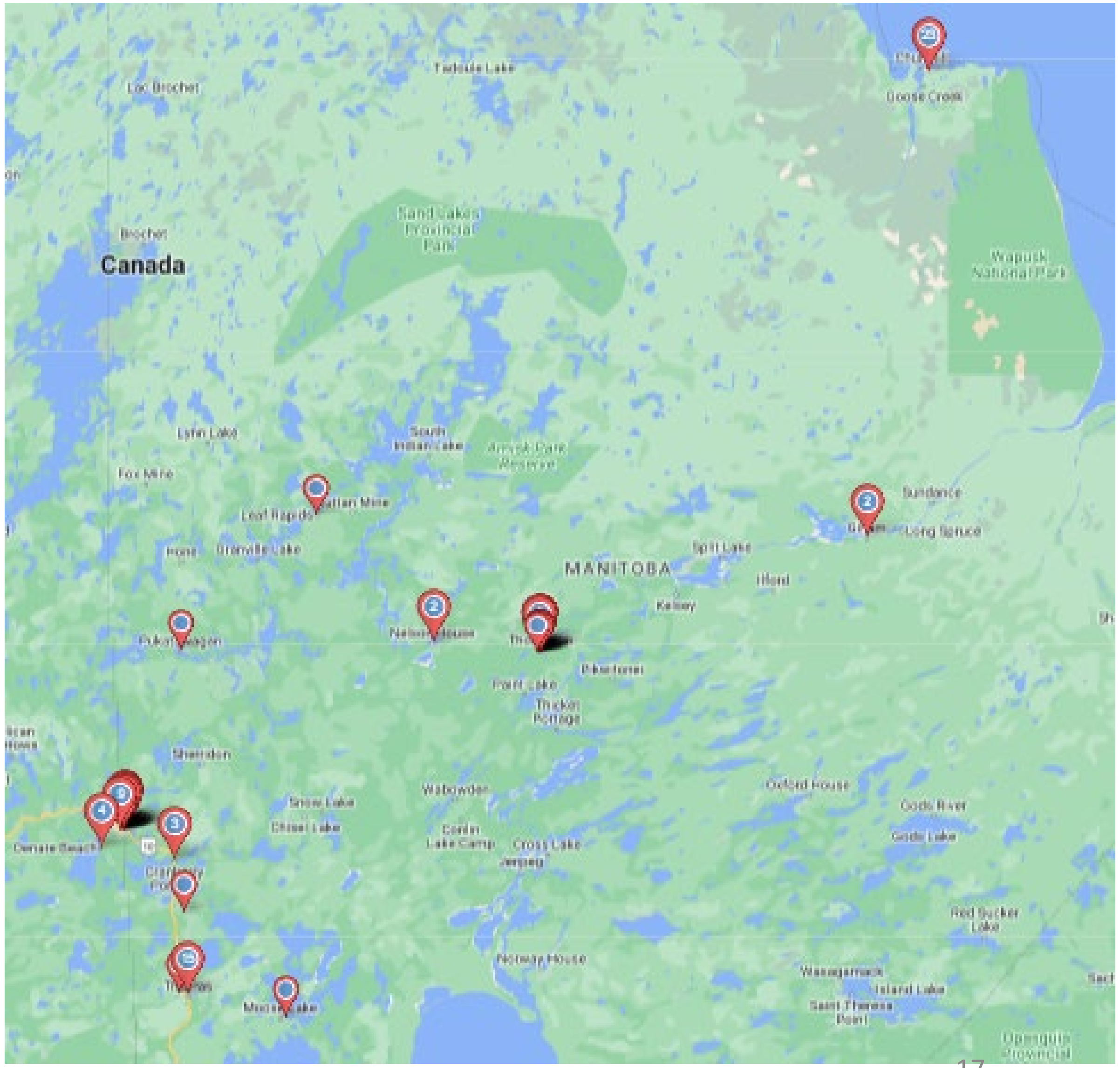
Artist Survey

Respondent Demographics

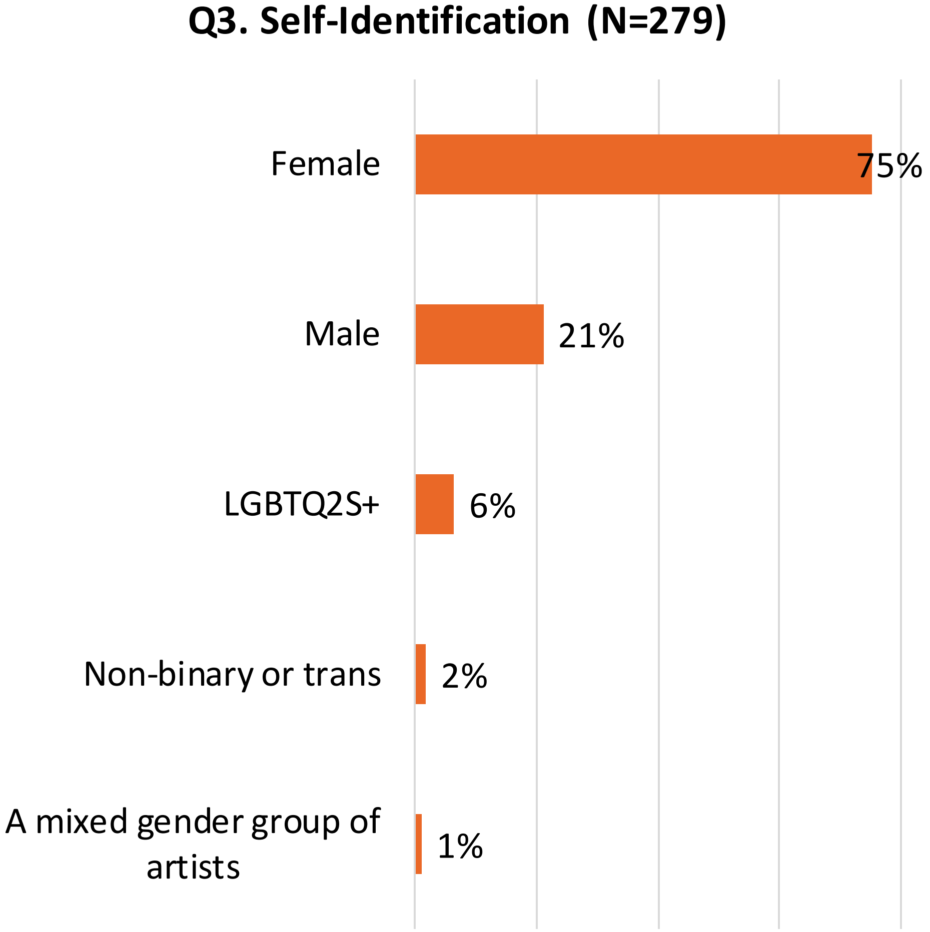
Location of Artists





Q2. Where do you live? (N=279)
Q50. Contact information: postal code (N=143)

Gender/Sexual Orientation



- Women dominate among respondents, as is often the case in the arts.
- Among professional artists, 33% are men and 64% women, while among hobbyists, only 17% are men and 79% are women.

Level of Arts Practice – Significant Cross Overs

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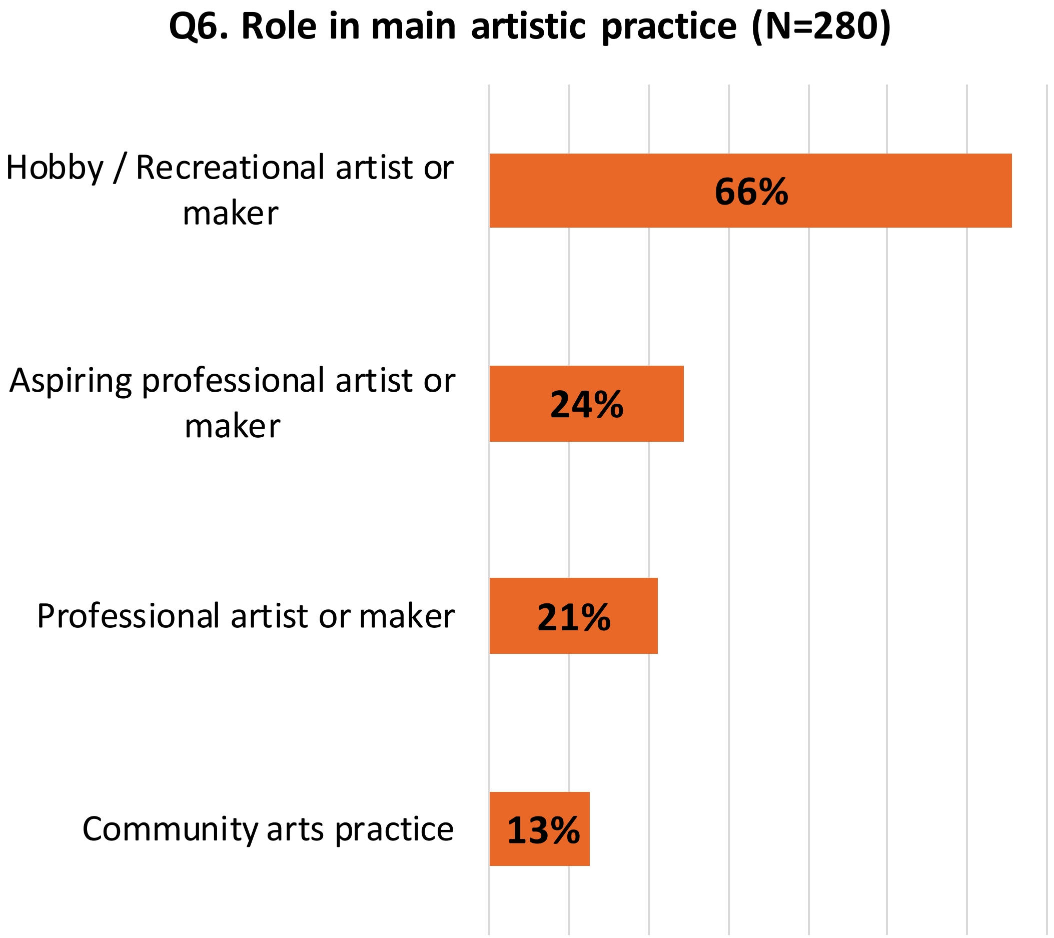

- Some professional artists or makers also identify as aspiring (25%) and hobbyists (10%) and with a community arts practice (8%)
- 40% of aspiring professionals also identify as hobbyists
- Greatest overlap for those reporting community arts practice is with hobbyists (54%)
- From the perspective of those identifying as Hobbyists: They are the largest group and have the least overlap with other groups, with 15% being aspiring professionals, 10% having a community arts practice and 8% also indicating being professionals.
- Respondents are included in every group they self-identified.

Age

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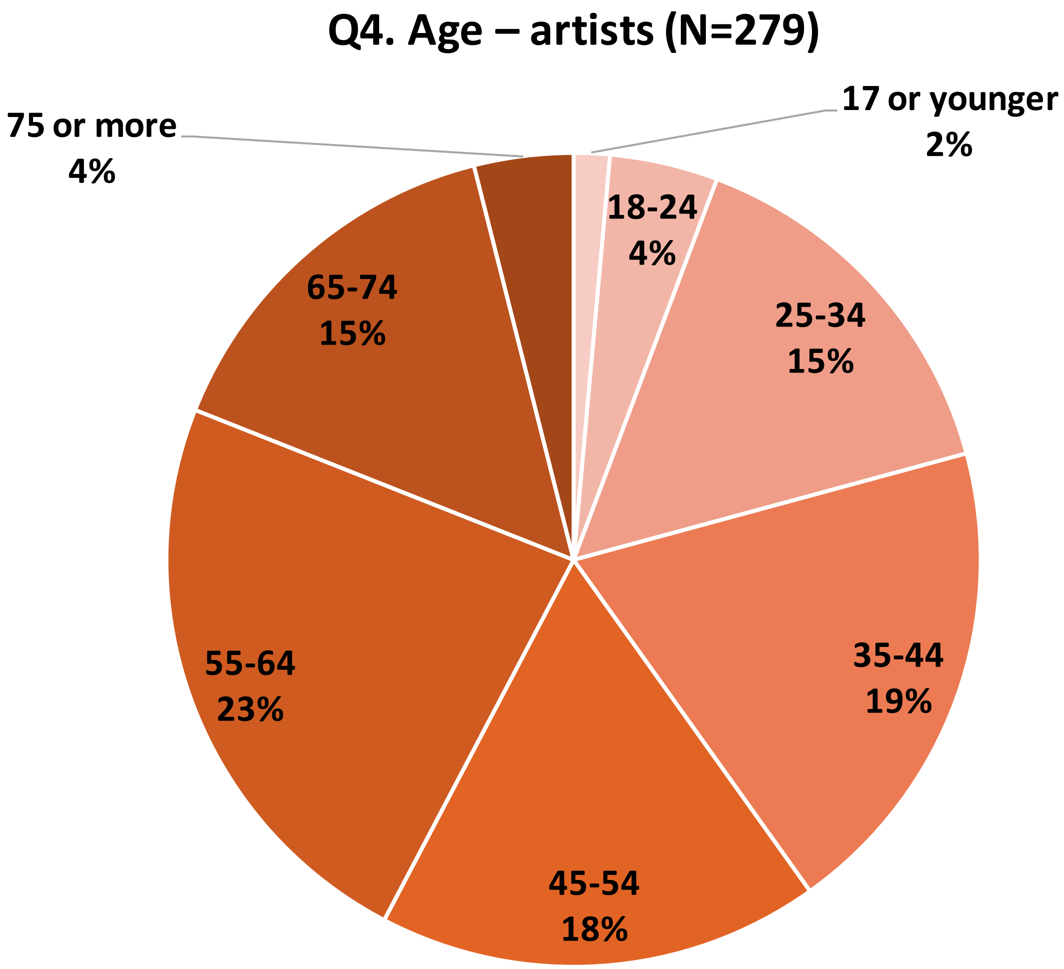

- Under 35 group is well represented with 21%, reflecting the relatively young age profile of Northern MB.
- High participation from towns with an older population, especially from Flin Flon, means there are 19% above 65 years of age.
- Non-binary and LGBTQ2S+ respondents are much younger than average. All non-binary respondents are under 35, and 77% of LGBTQ2S+ report being under 35 while only 17% of women and 26% of men are under 35.
- Professional artists on average are older than those aspiring, which is quite intuitive; and so are those who identify as community arts practitioners and hobbyists.

Ethnic Background

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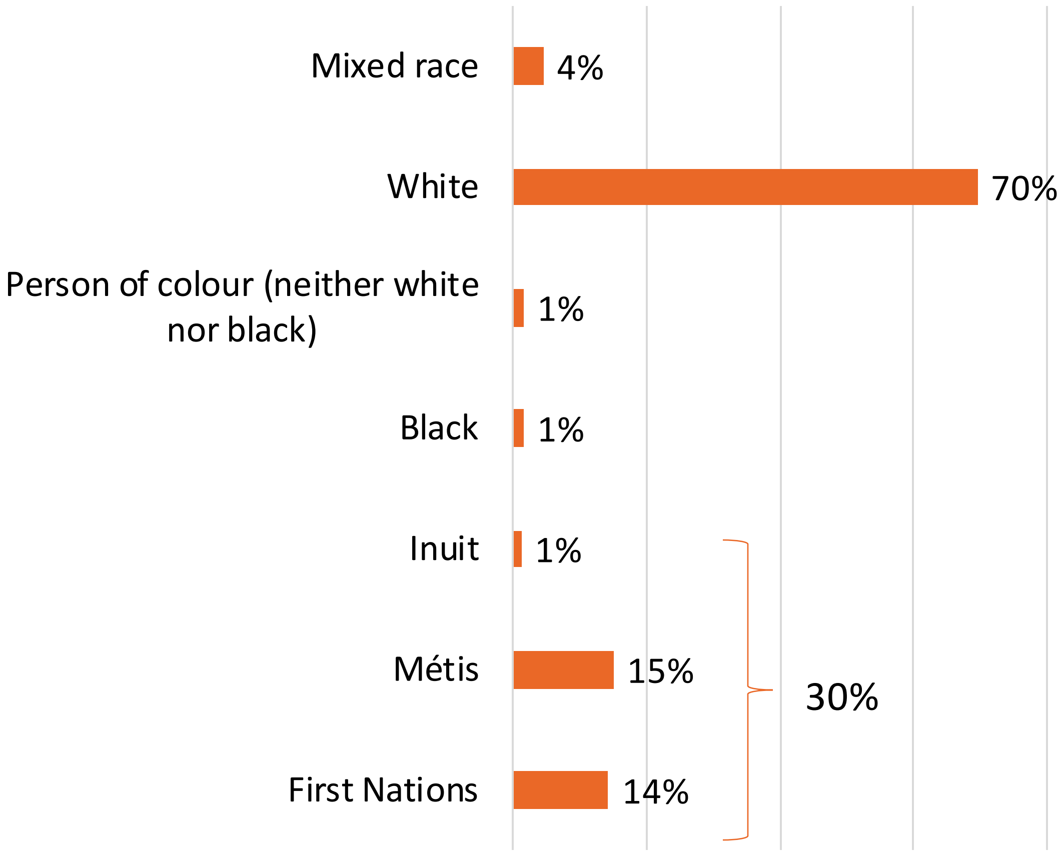
Q5. Group Self-Identification (N=273)



- 30% identify as Indigenous, which may be a significant underestimation of actual number of Indigenous artists and makers in Northern MB given that fully 75% of the population is Indigenous.

- Of Note: In Churchill 53% report an Indigenous identity, followed by Thompson (38%) and The Pas (31%), while only 21% do so in Flin Flon and 15% in other rural/remote places.

- 36% of aspiring professionals respondents are Indigenous; while 24% of professional respondents are Indigenous.

Length of Arts Career

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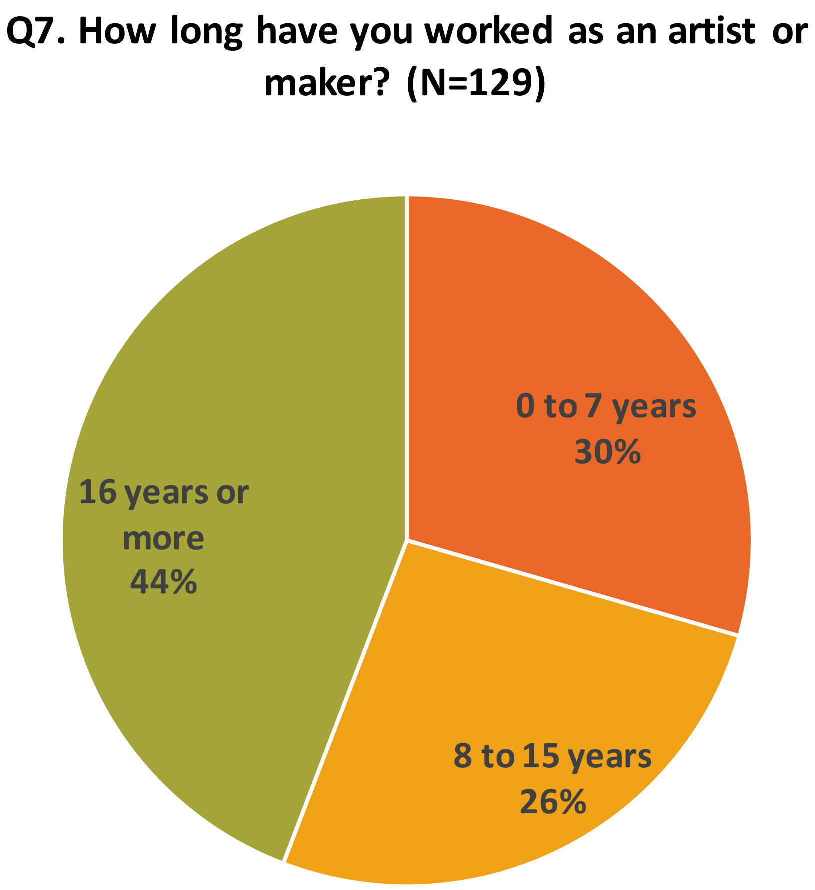

- Question was asked only of the subgroups that identified as Professionals and Community Arts Practitioners.
- Arts careers tend to be long among respondents, indicating the long-term dedication to arts, craft and creativity.

Employment in the Arts

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Q45. If you have full-time, part-time or casual employees, please indicate how many employees you have:		
	ALL	
0 - my income comes from other sources	48%	96
1 - only myself	47%	93
2	3%	6
3	0%	0
4	0%	0
5	1%	1
More than 5	1%	2
	N=	**198**

- About half report no employment, i.e. the arts are a hobby and 47% report only themselves.
- Only 9 artists/craft makers reported employing others at all, with most employing one other person, 1 employing five people; one reported employing 12 people and another reported employing more than five casuals.

Income Ranges for Individual Artists and Total Household Income Relatively Stable

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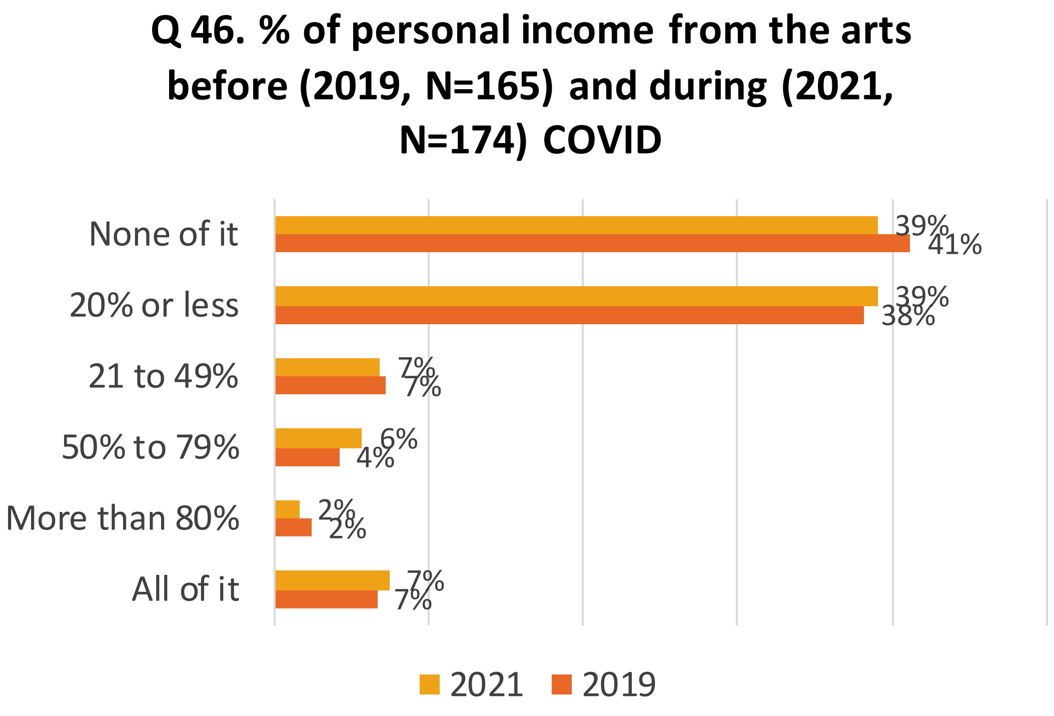

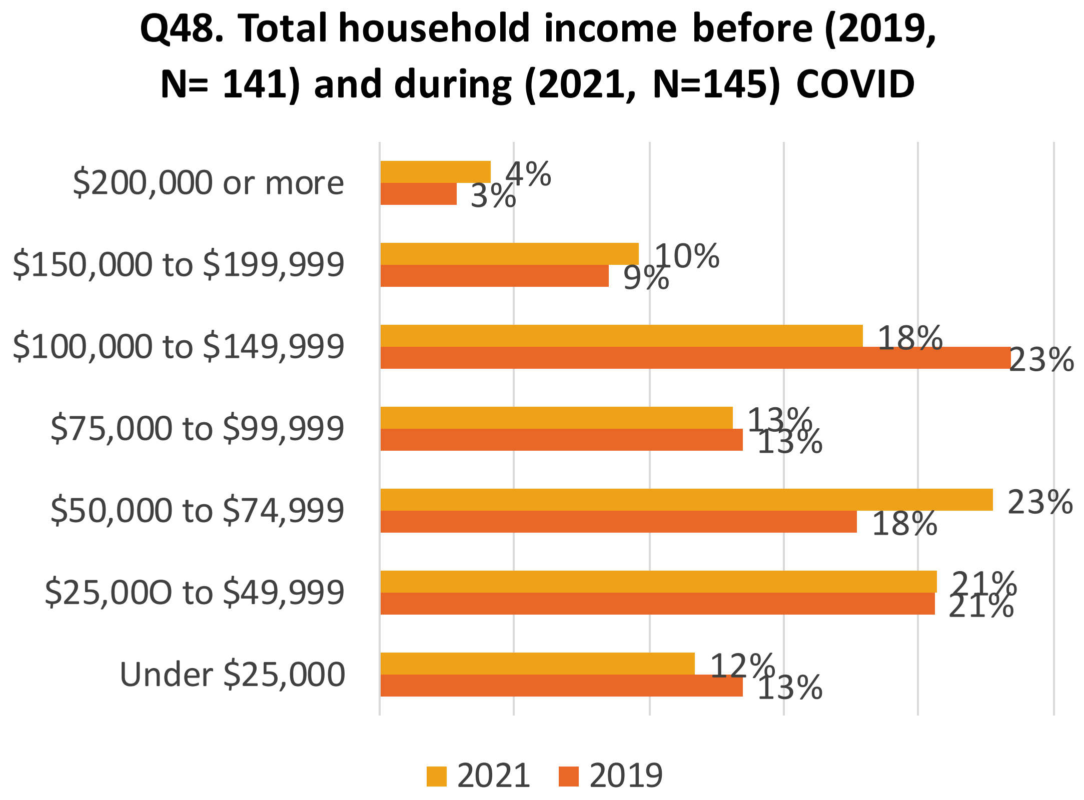

Note 1: About 100 artists who started the survey did not provide an answer to this question, but we keep them in the sample in order to capture other information they provided.
Note 2: Using ranges for income related questions makes it more difficult to track smaller changes in arts and household income; the number of respondents is smaller than for other questions as many people prefer not to respond to financial questions, or it is simply not relevant to them.

Q 49. Estimate of % of arts income within Household total (N=154)
An estimated 12% of HH income comes from the arts.
Only 4 respondents report 100% of their HH income comes from the arts and another 8 report 50% to 90% comes from the arts. 45 report between 10% and 49% of HH income comes for the arts.

Dominant Legal Structure for Arts Practice: None

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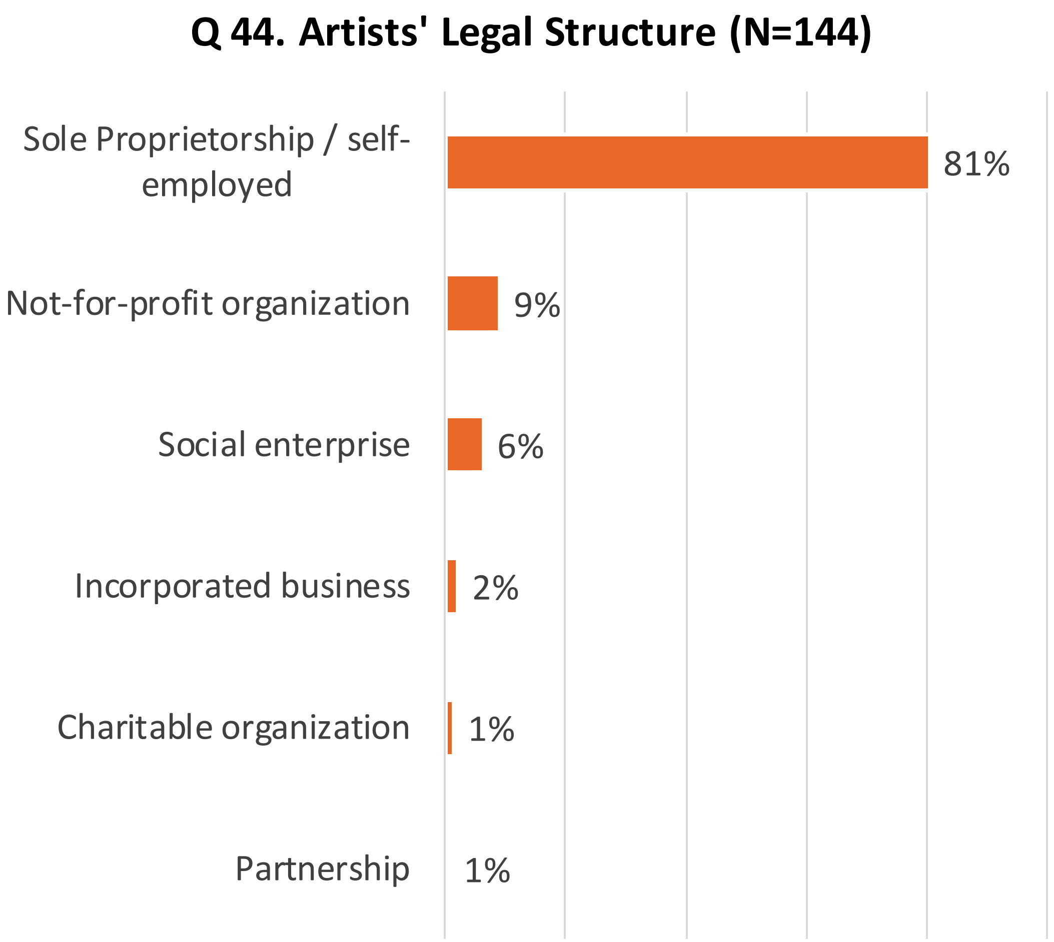

- Many artists and craft makers do not require any legal structure as they do not earn any part of their living from their arts and craft practice, which explains the lower number (N) of respondents.
- Of those who responded, 4 in 5 artists are self-employed.

Training in the Arts is Most Often Informal

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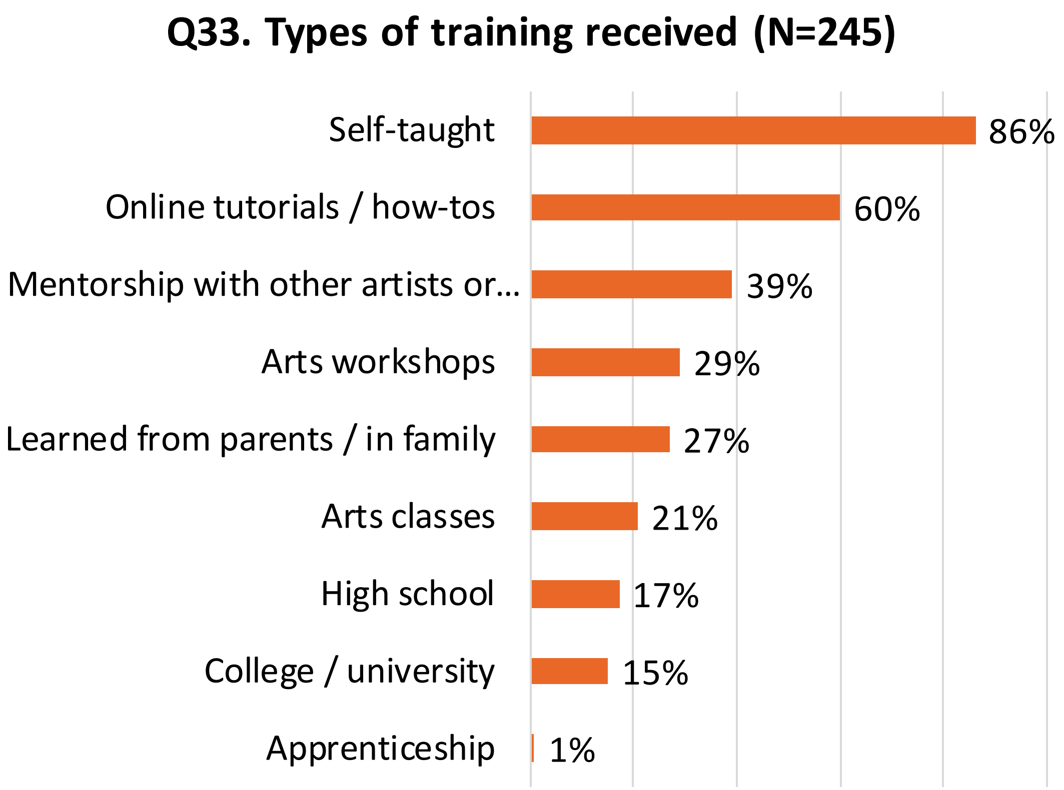

88% say they would benefit from more training in their arts or craft practice and 71% say they would benefit from training in business skills.

- On average, respondents cited 3 different teaching modalities they have used among the ones included in the survey.
- The vast majority (86%) report some degree of being self-taught, but only 3% report exclusively being self-taught – all of these 8 respondents identified as professional artists or craft makers.
- Online access is important with 60% reporting participating in training online.
- A combined 54% report training with mentors and / or learning in their family
- A combined 36% report training through art classes and/or workshops.
- A combined 27% reported some form of formal training in school, post-secondary and/or through apprenticeship.

Teaching is a Relatively Common Activity

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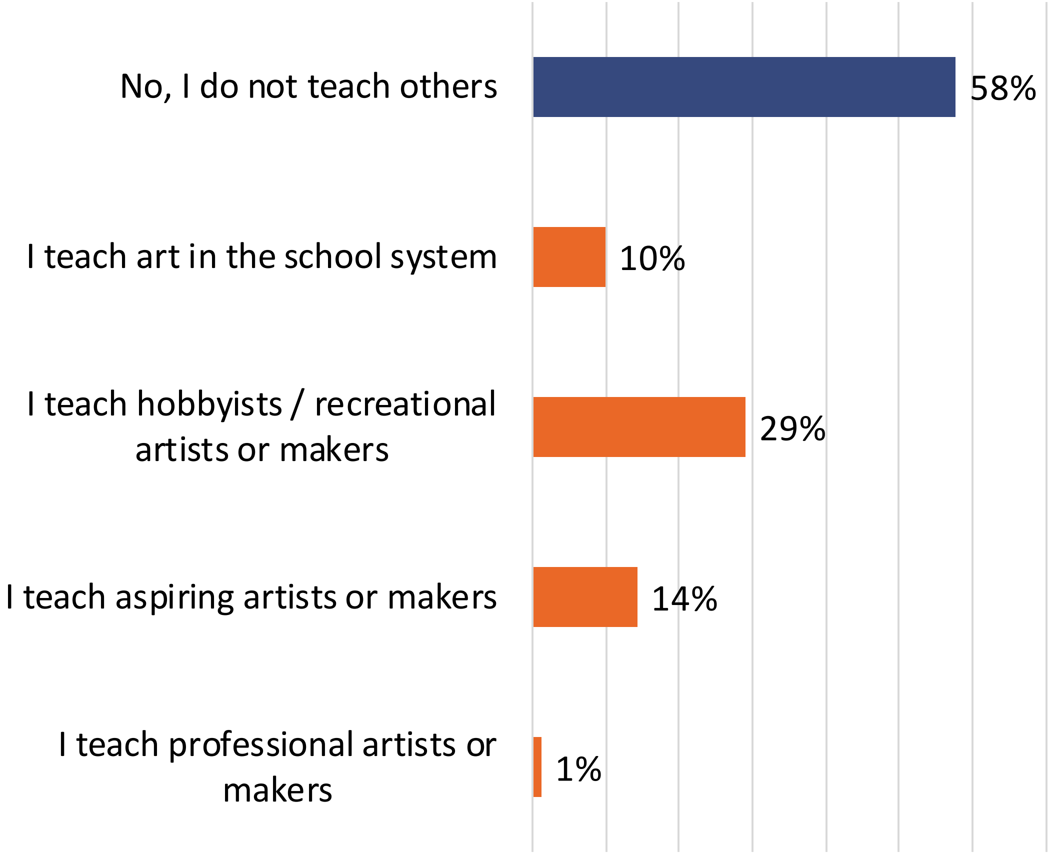
Q29. Do you teach arts or craft? (N=251)



- 42% report teaching arts or craft to others
  - 23% of these teaching artist teach two or more of these areas of practice
  - Most (29%) teach at the hobbyist level
  - 10% work in the school system (both as employees and artists-in-schools)
  - 14% report teaching at professional level
- Artists or makers at any level of practice are involved with teaching to varying degrees
  - 36% of hobbyists teach others
  - 44% of aspiring professionals
  - 52% of community arts practitioners
  - 63% of professional artists also teach

Training Locations are Diverse

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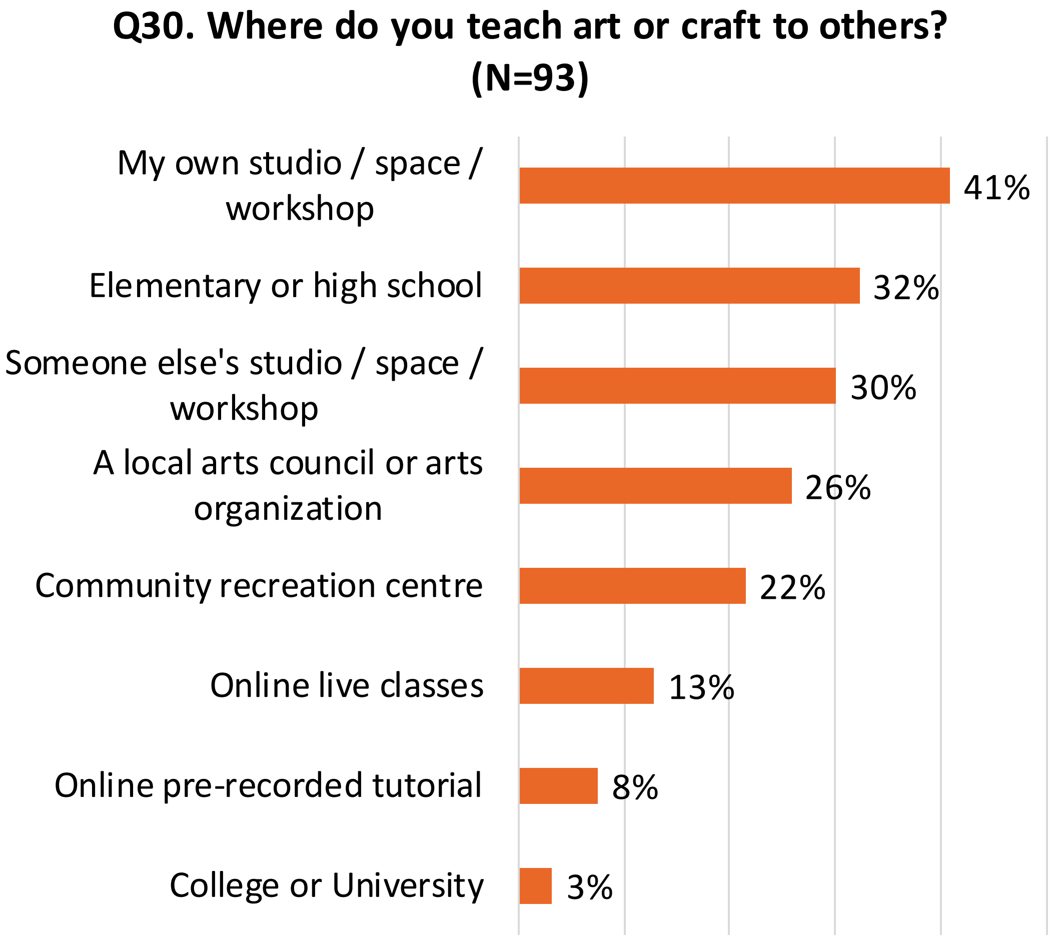

- Most teaching artists teach in several locations, with their own studio leading (41%) followed by schools (32%) and someone else's studio (30%).
- Arts Councils are cited by 26% of teaching artists and community centres by 22%.
- Online teaching is offered by 17% teaching artists
  - Of these, 75% teach via online live classes
  - 44% teach via pre-recorded tutorials

Income from Teaching as a Percentage of all Arts-related Income: 21%

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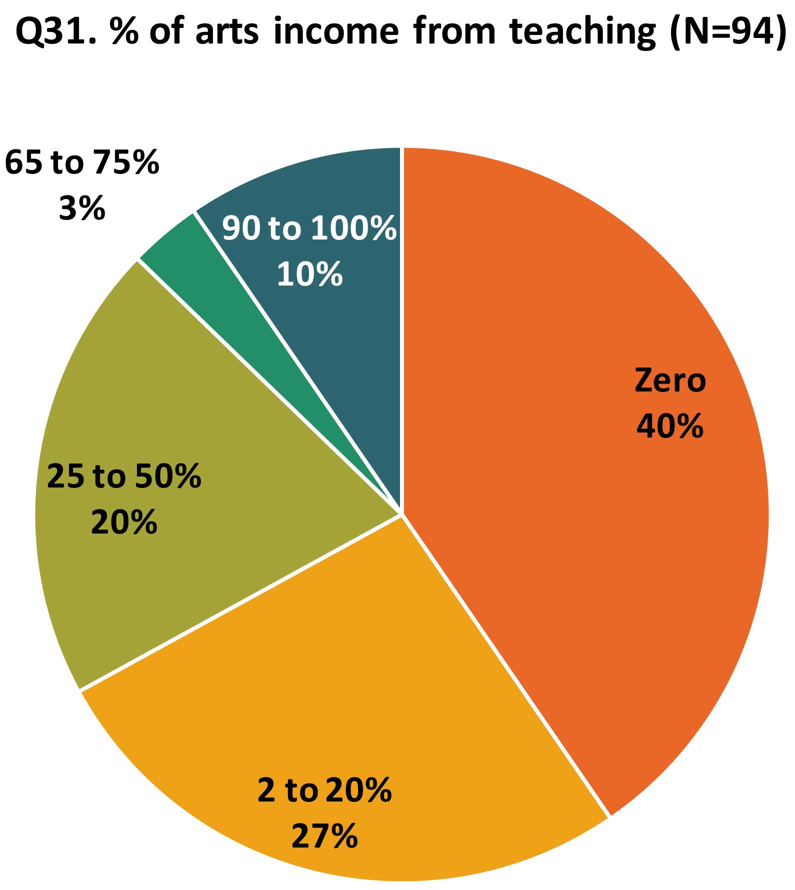

- 40% of teaching artists receive no pay for their work
- 47% make 50% or less of their arts income from teaching
- 13% earn more than 2/3 of their total arts income from teaching

- Of the 30 professional artists who also teach
  - 17% receive no pay at all
  - 56% receive 50% or less of their income from teaching

- The data makes clear, teaching without pay contributes significantly to the development of artistic practice and the arts eco-system

Percentage of Time Spent Working in the Arts

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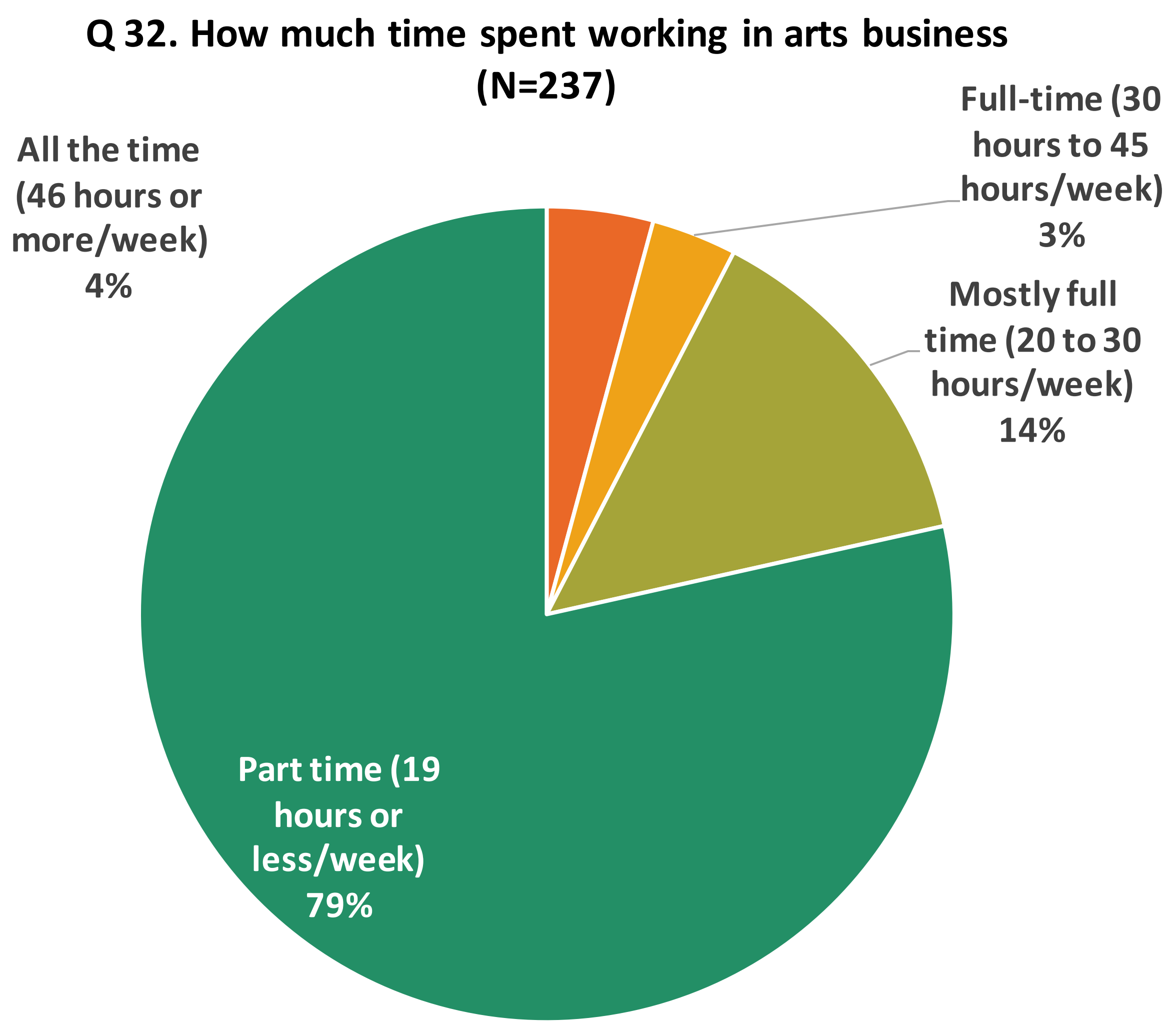

- A minority (7%) works full time on their arts or craft practice.
- 14% report working in the arts between 20 and 30 hours a week.
- 79% report working part time, 19 hours or less on average per week.
- Among the 50 individuals who identify as professional artists and responded to this question
  - 48% report working part time as artists
  - 28% report working 20 to 30 hours per week in the arts
  - 24% report working full time (6%) or all the time (18%)

Support, Supply and Sales

Artists Survey

Only 4 in 10 are Affiliated with an Arts Service or Industry Organization

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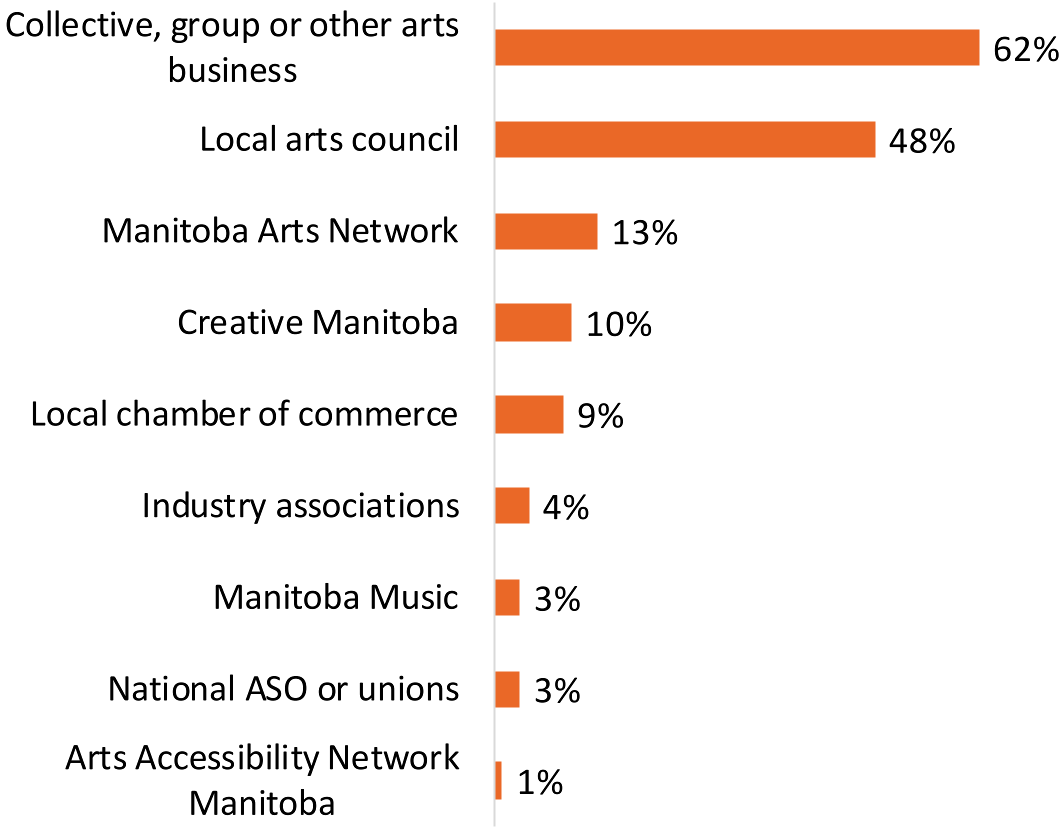
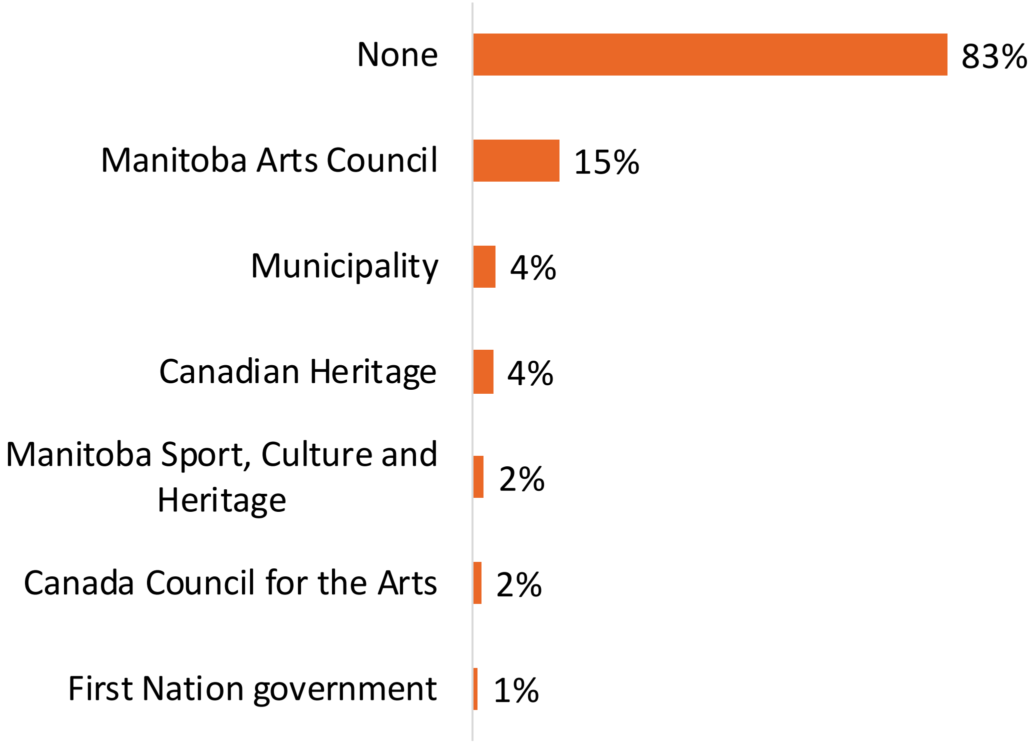
Q40. Please indicate if you are a member or have an affiliation with any arts, craft or business organizations. (N=91)



- The N is much smaller than previous questions, indicating that only 4 in 10 have any organizational affiliations or memberships.
- Of those who do, collectives or other arts groups (62%) are the most frequently mentioned affiliation followed by local arts councils (48%) where they exist.
- Some also have joined provincial organizations relevant to their interests, but few are members of a national organization.
- Specific other organizations mentioned
  - Local: Uptown Emporium, NorVa, North Star Quilt Guild, Northern Palette Art Club, Flin Flon Pottery Club, Parksville Quilt House, Quilt Guild, Mystery Country Quilters, Skillshare, Churchill Creative Collective Community Arts, Cultural Co-operative Inc
  - Provincial: Manitoba Craft Council, Manitoba Prairie Quilters, The Fiber Arts Manitoba, Manitoba Society of Artists, Manitoba Writers Guild
  - National: Glass Art Association of Canada, CARFAC, Canadian Quilters Association

Most have not Received any Public Funding Support

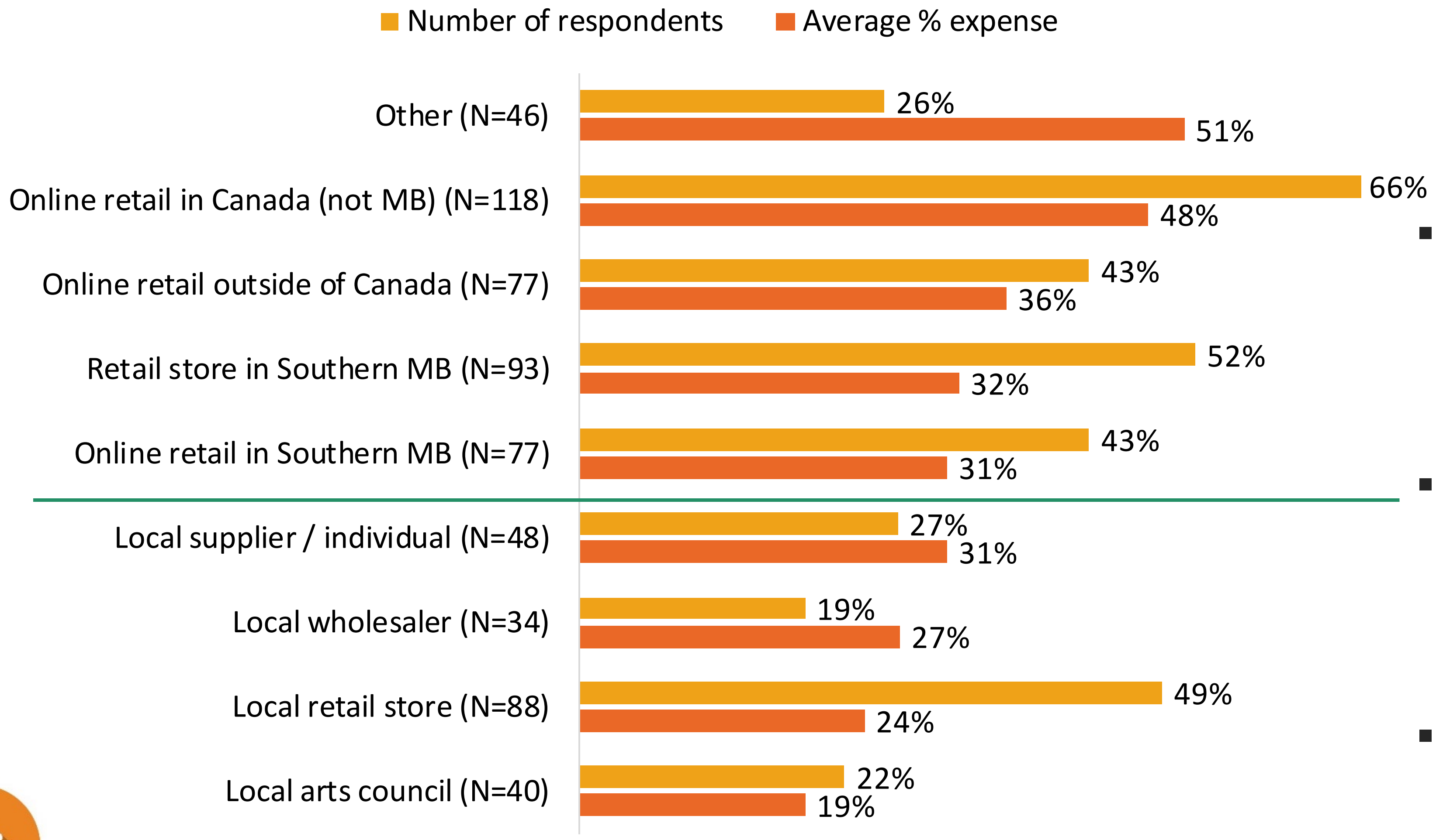
Q41. Public funders supporting your work through grants or contributions within 5 years? (N=198)



- Only 17% report having received public funding in the last 5 years.
- Those active in Community Arts (43%) and professional artists (33%) have received more public support that aspiring professionals and hobbyists (12% each).
  - Manitoba Arts Council is the most often cited funder (43% and 30% respectively)
  - Of note, very few among professional artists have received Canada Council for the Arts funding – this may be an untapped opportunity to increase funding for creation, production and digital innovation if it can be activated.

Majority of Supply is not Local

Q42. Source of supply for resources, tools or raw materials? Simply estimate the % of resources you require based on their dollar value for each source that applies to your situation. (N=179)

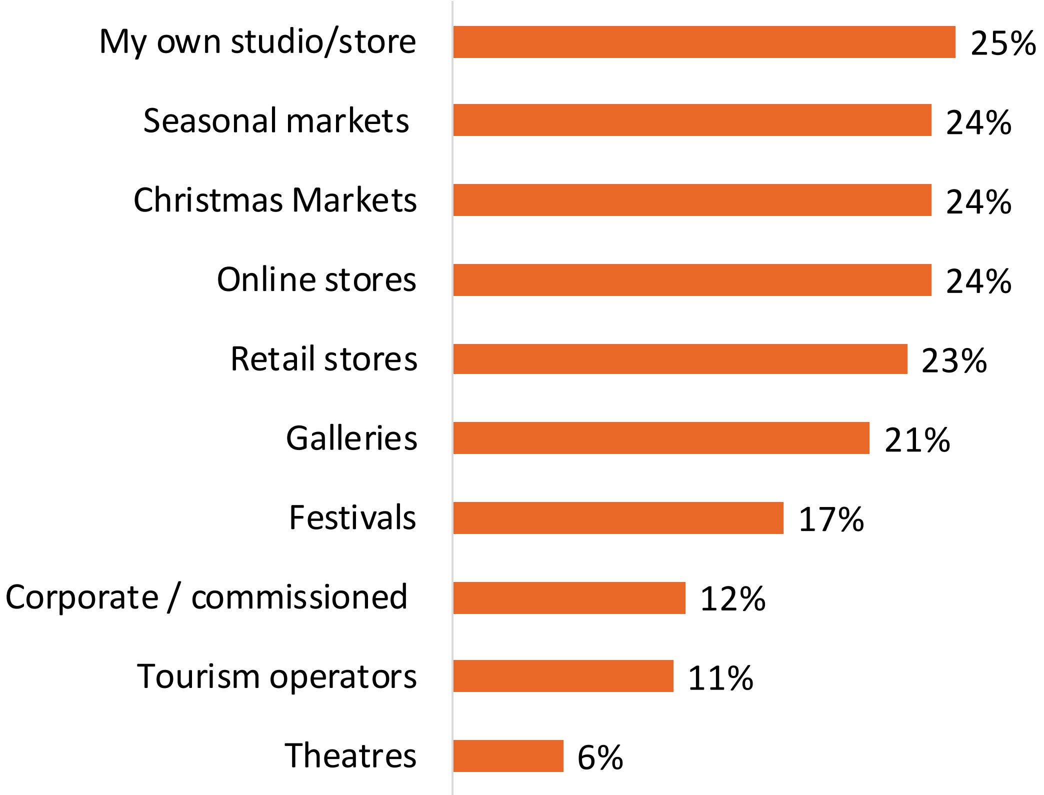


- Of those who responded to the question about the source of their materials, tools, a large majority get their supply from outside the local area.
  - Online shopping is the dominant source of supplies for most.
- Nearly half report using a local retail store and other local suppliers to a lesser degree.
  - But local retail only garners a relatively small percentage of sales.
- The percentage of expenses incurred for supplies is highest for "other" (undefined) followed by online shopping from sources outside the local area.
- Respondents identified on average 3 types of sources of supply

Wide Range of Sales Avenues by Those Who Sell

strategic moves THINKING : BUSINESS

Q43. Where you sell, exhibit or present your work. (N=161)



- With a large majority of visual artists and craft makers among respondents, studios, and local markets are top sales avenues.
- Online and retail sales outlets round out a very close top 5.
- Festivals and Theatres are a lesser sales avenue, reflecting the lower proportion of performing arts and musicians among respondents.

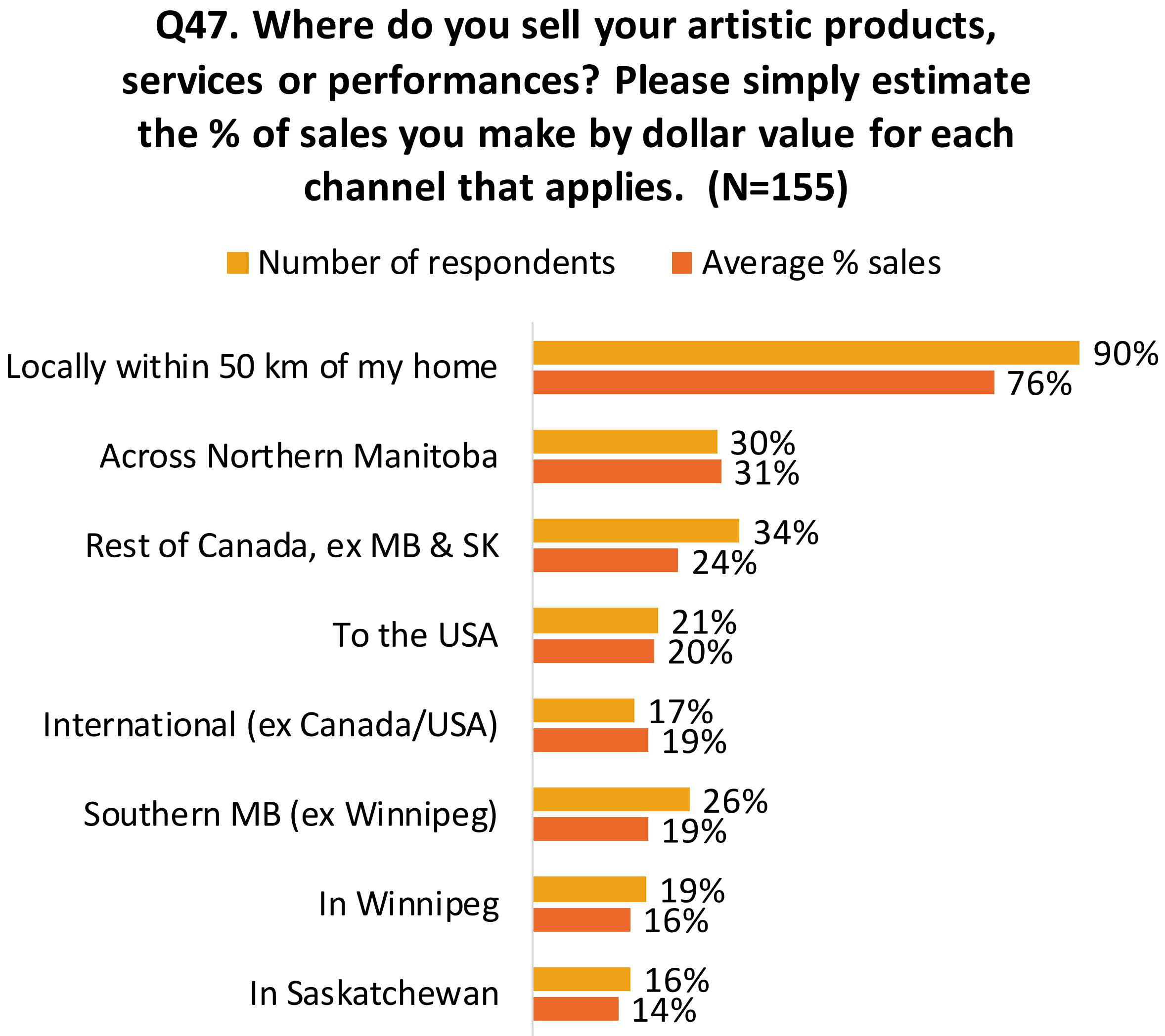
- On the following two pages, the list of specific sales venues respondents mentioned are listed by type.
  - The most frequently mentioned avenues: Uptown Emporium, Norva Centre, Local Arts Council markets, and Facebook

Festivals	Galleries	Online stores	Corporate clients / commissions
dance	Art Galleries	Amazon	Commissions (private)
Arts and Cultural Festivals	Gallea	Apple music	Community Futures Greenstone
Aurora Winterfest	Heritage North Museum	Bandcamp	Currie Accounting
Culture Days	Local Art Centre	deetsbydee.com	Greenhouses (The Pas/Tisdale)
Flin Flon Pride	Northern Juried Art Show	Etsy	Home Hardware
Blueberry Jam Music Gathering	Norva Centre	Facebook	Hudson Bay Helicopters
Fusion Fest	Sam Waller Museum	Facebook Market Place	Movember
July 1 TRCC	Uptown Emporium Flin Flon	flittermouseart.square.site	Pub 55
Sled Island	**Retail stores**	Instagram	Sasagui Rapids Lodge
Thompson Arts Festival	26 Feathers	kiwetinohkstudio.myportfolio.com	Skills Canada
Trapper Festival	58 North, Churchill	My personal website	Vale
Trout Festival	Arctic Trading Post	Shopify	
	Babas bulk	Spotify	
Theatres	Chicken Chef	Streaming services	
RH Channing Auditorium, Flin Flon	Creighton Tourist place	Threadless	
Churchill Theatre	Dauphin	Uptown Emporium	
Flin Flon Community Hall	Flin Flon Public Library	Writers' Group online Book Store	
Flin Flon CC musicals	Friendship centre	www.Etsy.com/shop/fusemusefusedglass	
Ham Sandwich Theatre Group	McNally Robinson	Www.FuseMuseFusedGlass.com,	
Johnny's Social Club	MEDO	www.pedsthreads.com	
	Northern Store Churchill		
	NorVa Art Gallery		
	Orange Toad		
	Southern Manitoba		

Christmas Markets	Seasonal markets (e.g. farmers markets)	Tourism operators
Arts Council Christmas Market	Artisan Market - Cranberry Portage,MB	Art workshops with tour groups
Brandon's Big One	Churchill Creative Collective Pop-Up Markets	Baker's Narrows Lodge
Carrot Valley Hall	Cranberry Portage Artisan Markets	Creighton tourism
Church markets - mall sales	Creighton economic center, Tourist centers	Frontiers North Adventures
Churchill Christmas Markets	Culture Days	Iceberg Inn
Churchill Snowflurries, once a year	Meet the artist, once a year	Local tourist bureau
Craft tables The Pas	Minnedosa Farmers Market	Natural Habitat
Cranberry Portage Christmas Craft Sale	Outdoor areas around community	Rocky View Lodge, Denare Beach,SK
Extravaganza	Regina summer market	Seasonal Lodge
Flin Flon Arts Council Christmas Arts & Crafts Sale	Thompson events	TRAVEL MANITOBA
Flurries	Trade show	Water & the Wild
Golden Agers Hall	Wild Things Market	
Legion Christmas Craft Show	CHTM Trade Show in Thompson	
Local Arts Council Craft Sale		**Other**
MMF Hall		Friends and family
Mmwt		Word of mouth
The Pas Christmas market		Local churches
Thompson Christmas markets		My partner while he travels with work
		Piano Recitals at local schools
		Retreats in SK and MB
		Schools
		Tattoo convention
		The hood

Majority of Sales are Local and across Northern MB

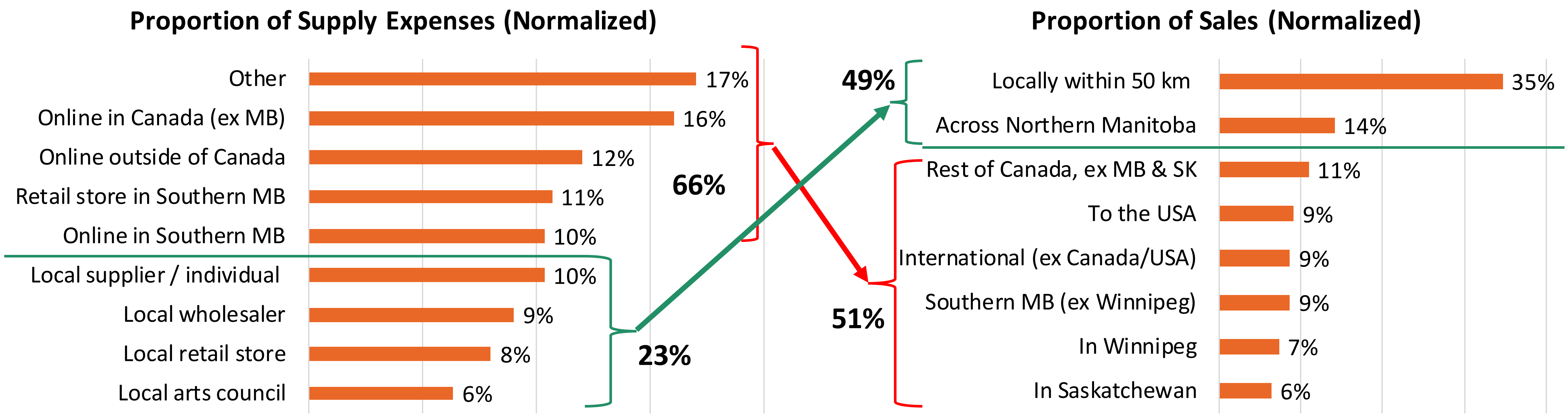
strategic moves THINKING : BUSINESS



- The highest proportion of sales goes to the local market.
- A similar total proportion of sales goes to regions outside of Northern Manitoba, including outside of Canada.

Normalizing Supply Expenses and Sales to 100%

strategic moves THINKING : BUSINESS



We've normalized the supply expenses and sales proportions to 100%, by dividing each individual cumulative average by the sum of all for each question. That results in this chart, showing a "normalized" to 100% chart for easier comparison and understanding.

Of note: The current dynamic where artists and craft makers bring in more supply from outside the region, add value by creating product locally and then sell finished product roughly equally within the region and outside of it appears to generate lower local economic impact for the North than sourcing locally, adding value through production locally and selling outside of Northern Manitoba would, as long as the cost of getting product to outside market is not prohibitive. Finding ways to shift this balance may be a viable public policy direction as part of Northern economic development policy, supporting local artists and makers and building up the arts eco-system. **Limitation:** This survey did not collect $ value information which limits its ability to quantify economic impact more specifically.

Disciplines and Confidence in Skills

Artistic and Business Skills

Respondents are Active Across Disciplines

strategic moves THINKING : BUSINESS

ImagiNorthern Survey July 2022	Northern MB
Music	19%
Literature, Writing	12%
Visual Arts, Crafts	76%
Film, Video and Media Arts	7%
Performing Arts	5%
Applied arts (e.g. architecture, design)	4%
Total artists	**274**

- Respondents to the survey span all artistic disciplines. Visual arts and craft are over represented relative to provincial averages while all others are under represented.
- Specific genres were identified for each discipline (see next page).
- For music, a question about who they played with was added:

Q13. Do you play music with:	Music
Choir	36%
Band or Group	58%
On your own, solo	60%
Orchestra	4%
N=	**53**

Respondents' Genres within Discipline

strategic moves THINKING : BUSINESS

Performing Arts		Music		Visual Arts / Craft		Film, Video, Digital Media		Writing, Literature		Applied Arts	
Theatre	67%	**Rock or Pop**	66%	Painting	46%	**Short films**	63%	**Fiction**	56%	**Graphic Design**	90%
Musical Theatre	60%	**Folk**	55%	Fibre/ Fabric	42%	Documentary	37%	**Non-fiction**	53%	Architecture	20%
Concerts	27%	Classical	47%	Beadwork	21%	Media arts	37%	Poetry / Spoken Word	44%	Fashion	10%
Dance / Ballet	20%	Country / Blue grass	45%	Wood	20%	Video games	11%	Newspapers	26%	Photography	10%
Storytelling / Spoken Word	20%	Blues	28%	Photography	18%	Virtual Reality	5%	Magazines	12%	Industrial Design	10%
Puppetry	13%	Jazz	21%	Jewellery	18%	Feature films	0%	How-to book, Cookbook	9%		
Opera	7%	Soul / R&B	11%	Paper arts	17%	Augmented Reality	0%	Playwrighting	3%		
Improv	7%	Hip Hop/Rap	6%	Leather / Hides / Fur	16%						
		Reggae	4%	Sculpture	11%						
		Electronic	4%	Ceramics - Pottery	8%						
				Glass	7%						
				Metal	5%						
				Stone	5%						
N=	15	N=	53	N=	209	N=	19	N=	34	N=	10

Q34. Do you feel you would benefit from additional training opportunities?

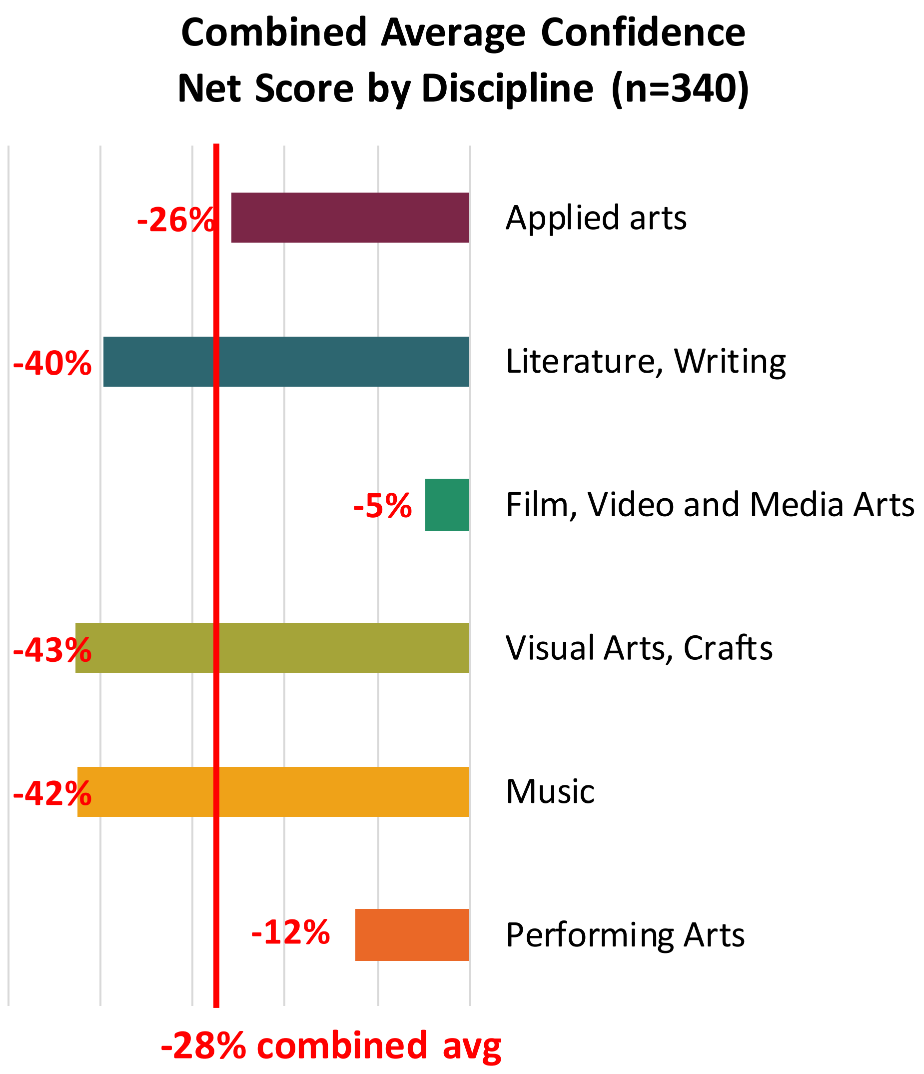
strategic moves THINKING : BUSINESS

- **88% say they would benefit from more training in their arts or craft practice and 71% say they would benefit from training in business skills.**

- This is a much higher proportion than the people who make some or all of their living from their arts or craft practice.
- It is clear, hobbyists take their arts practice very seriously and invest considerable time, money and effort into their creative and artistic endeavours. They are an important part of the arts-ecosystem in North MB.

- A series of discipline-specific questions related to confidence in artistic and business skills was asked. Some responded to more than one discipline as they practice more than one.

Q 10-Q27. How confident are you in your / your team's skills in the following areas?



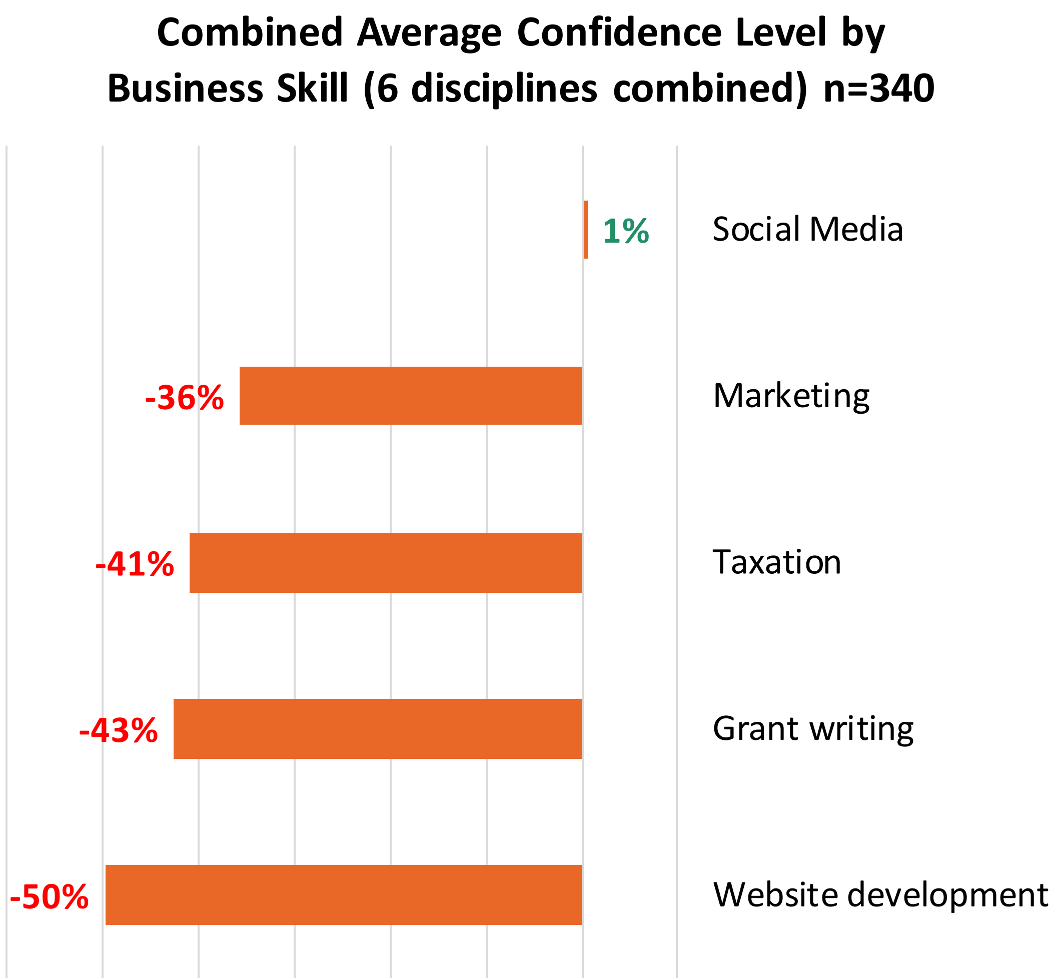
Analysis method

- A series of questions about specific skills, from creation and production to marketing and dissemination within each artistic discipline were asked, using a 5-point confidence scale.
- The data was analyzed by adding top box (4 and 5 points) and subtracting the bottom box (1 + 2) to arrive at a net score.
- This Net score theoretically can range from plus 100% to minus 100%. A score of zero would mean that the same number of people indicated high confidence as did low confidence. A negative score means more people indicated low confidence than high confidence.

Top Line Result

- Across all disciplines, respondents reported various degrees of lower confidence in their skill sets. On average for every person that expressed higher confidence, 3 expressed lower confidence.
- People active in film, video and media arts as well as performing arts are more confident in their skills than those in other disciplines.

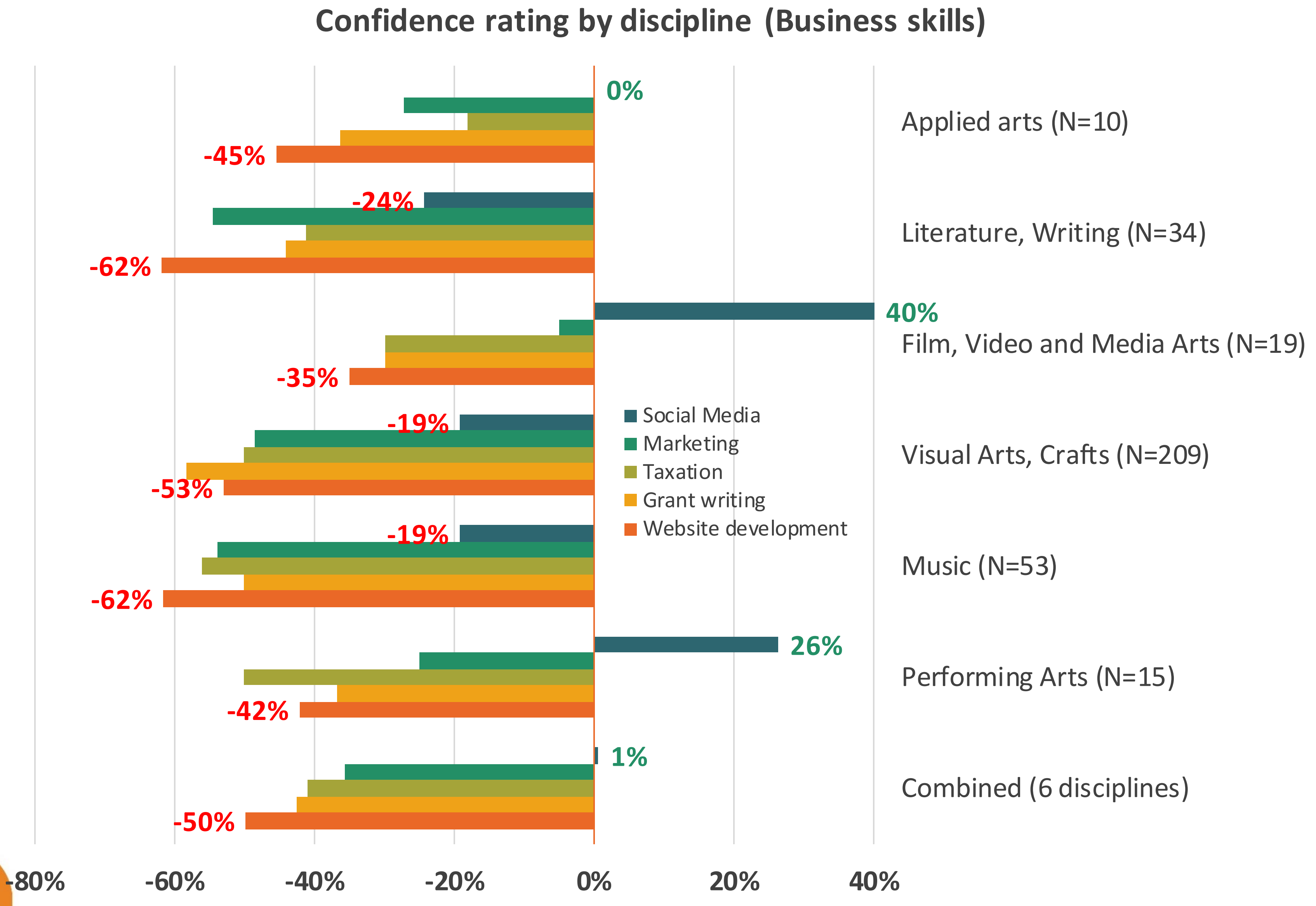
Low confidence in business skills



- Except for social media, the confidence level in skills is low for all business skills.
- As confidence in these skills is lacking across all disciplines there may be enough need to offer training in these areas in a manner that is relevant to artists and craft makers across disciplines.

Low confidence in business skills across disciplines

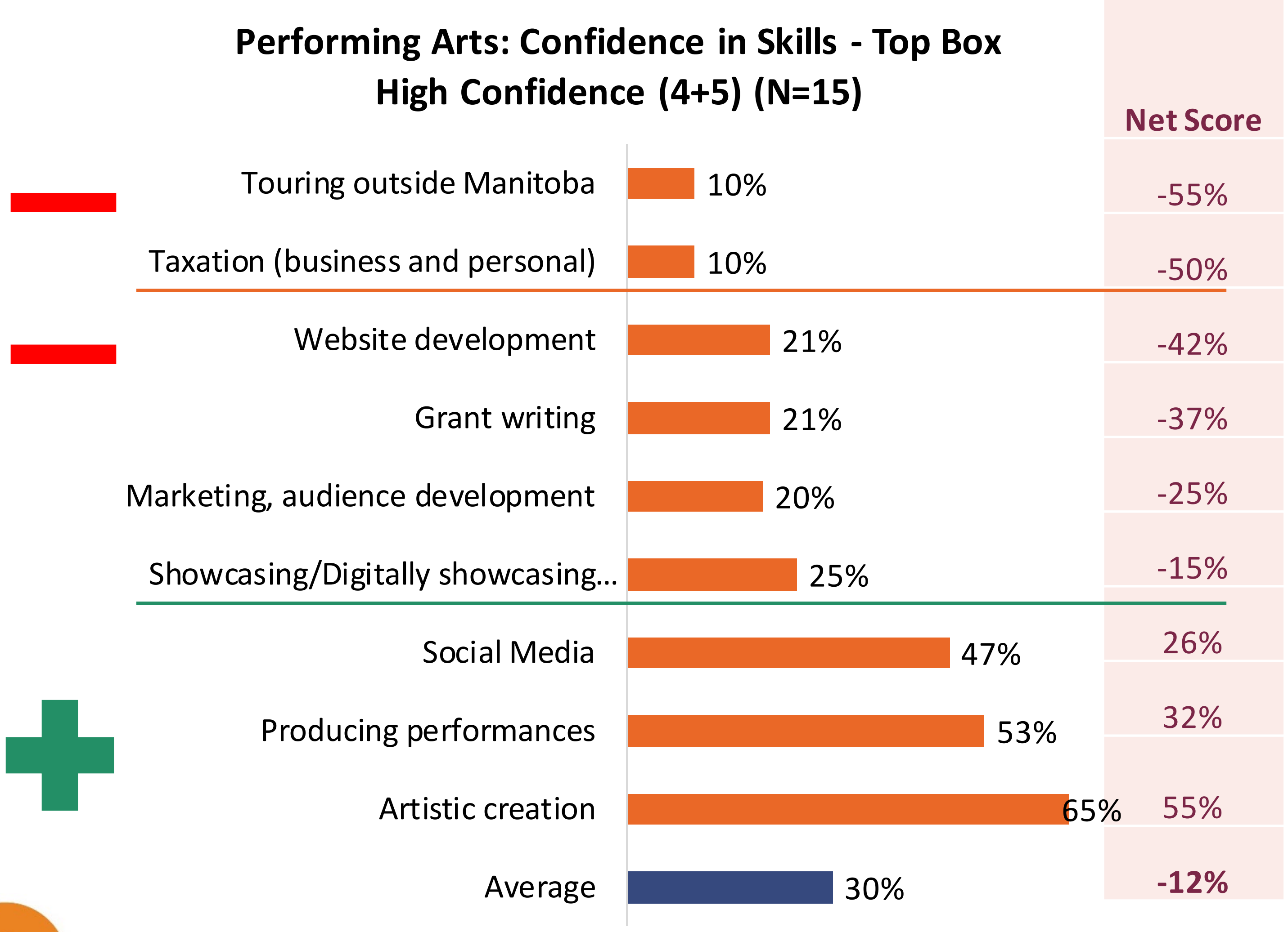
strategic moves THINKING : BUSINESS



- There is some variance between disciplines.
  - Notably, people in film, video and performing arts have net positive confidence in the use of social media.
  - Web development is lowest among people in literature/writing and music sectors; as is marketing.
  - Grant writing is lowest among visual artists/craft makers.

Performing Arts – Top Box Confidence and Net Score

strategic moves THINKING : BUSINESS



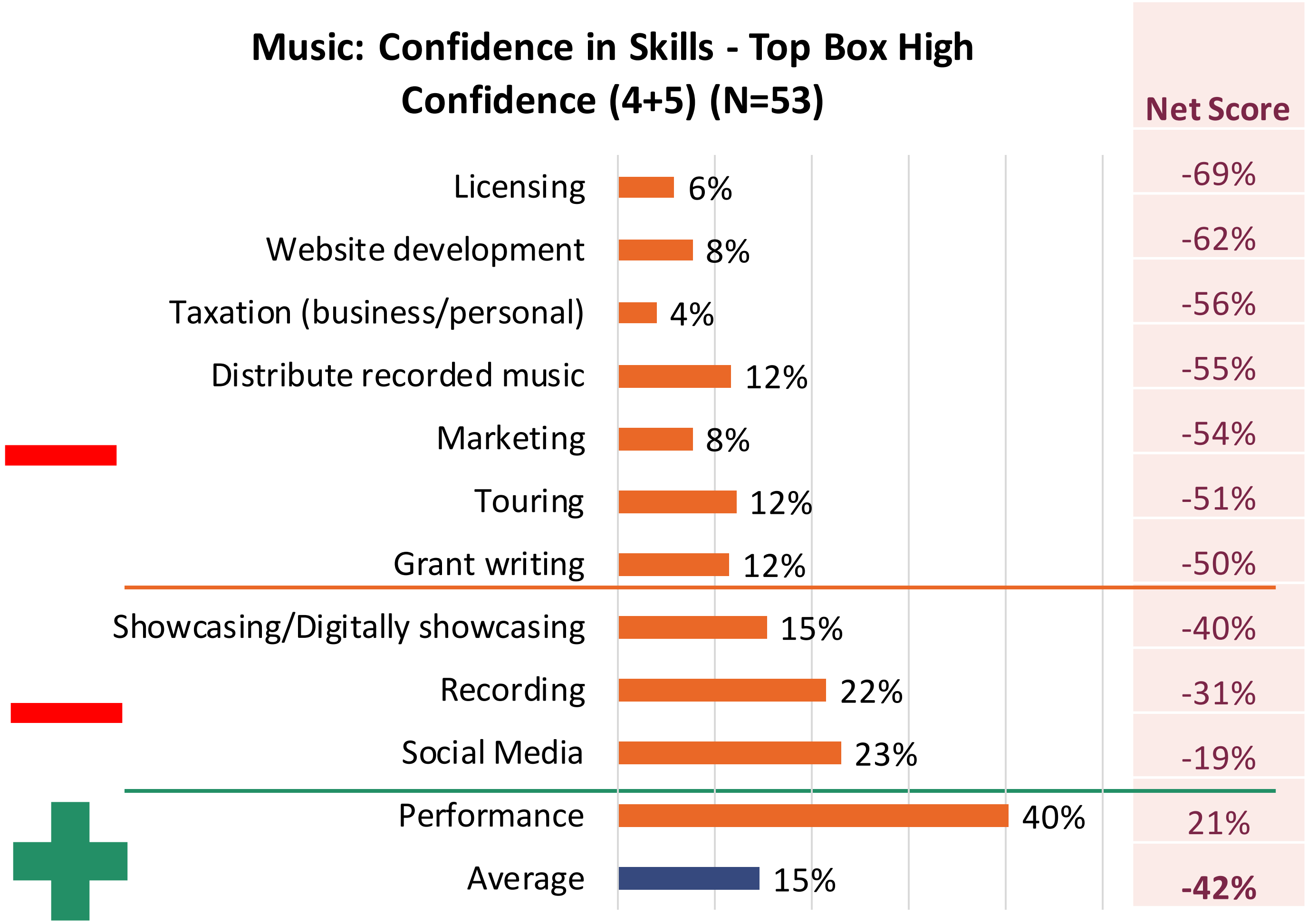
Artistic creation and production and use of social media show **high confidence** among those in the performing arts.

The skills related to the business of the performing arts received a negative net score, meaning more people reported low confidence (1+2) than high confidence (4+5).

While few respondents are active in the performing arts, there is some opportunity to increase skills for those who want that in particular in areas where many others also report low confidence.

Music – Top Box Confidence and Net Score

strategic moves
THINKING : BUSINESS



Only performance shows **high confidence** among those in the music sector.

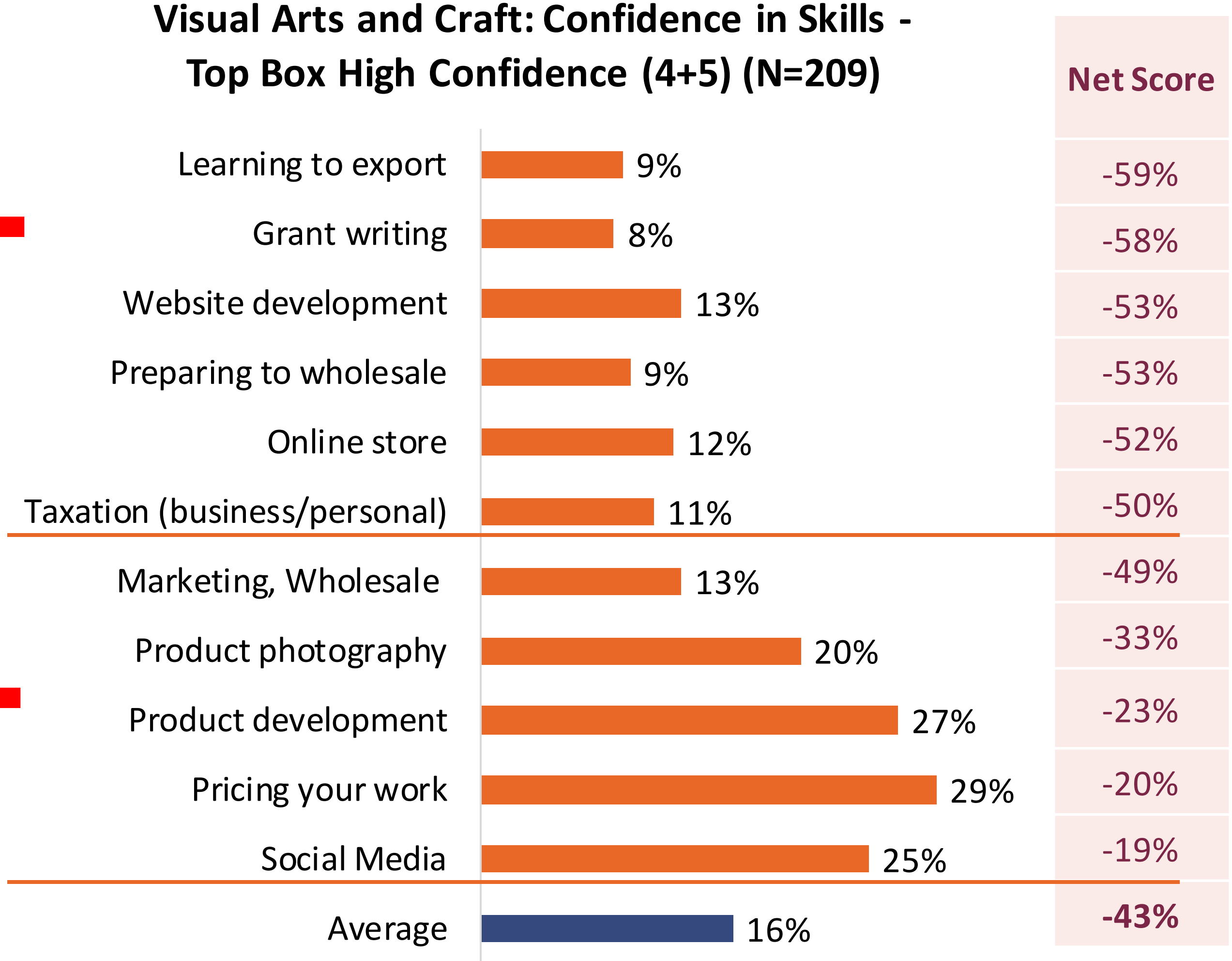
The majority of skills to operate in the music business received a negative net scores above -50%, meaning many more people reported low confidence (1+2) than high confidence (4+5).

Music is the second largest group of respondents. That means there might be great usefulness to offering music specific information session on recording, distribution, touring, or licensing. Along with information about other business skills like marketing, web development, or grant writing.

Visual Arts and Craft – Top Box Confidence and Net Score

strategic moves THINKING : BUSINESS

Visual Arts and Craft: Confidence in Skills - Top Box High Confidence (4+5) (N=209)



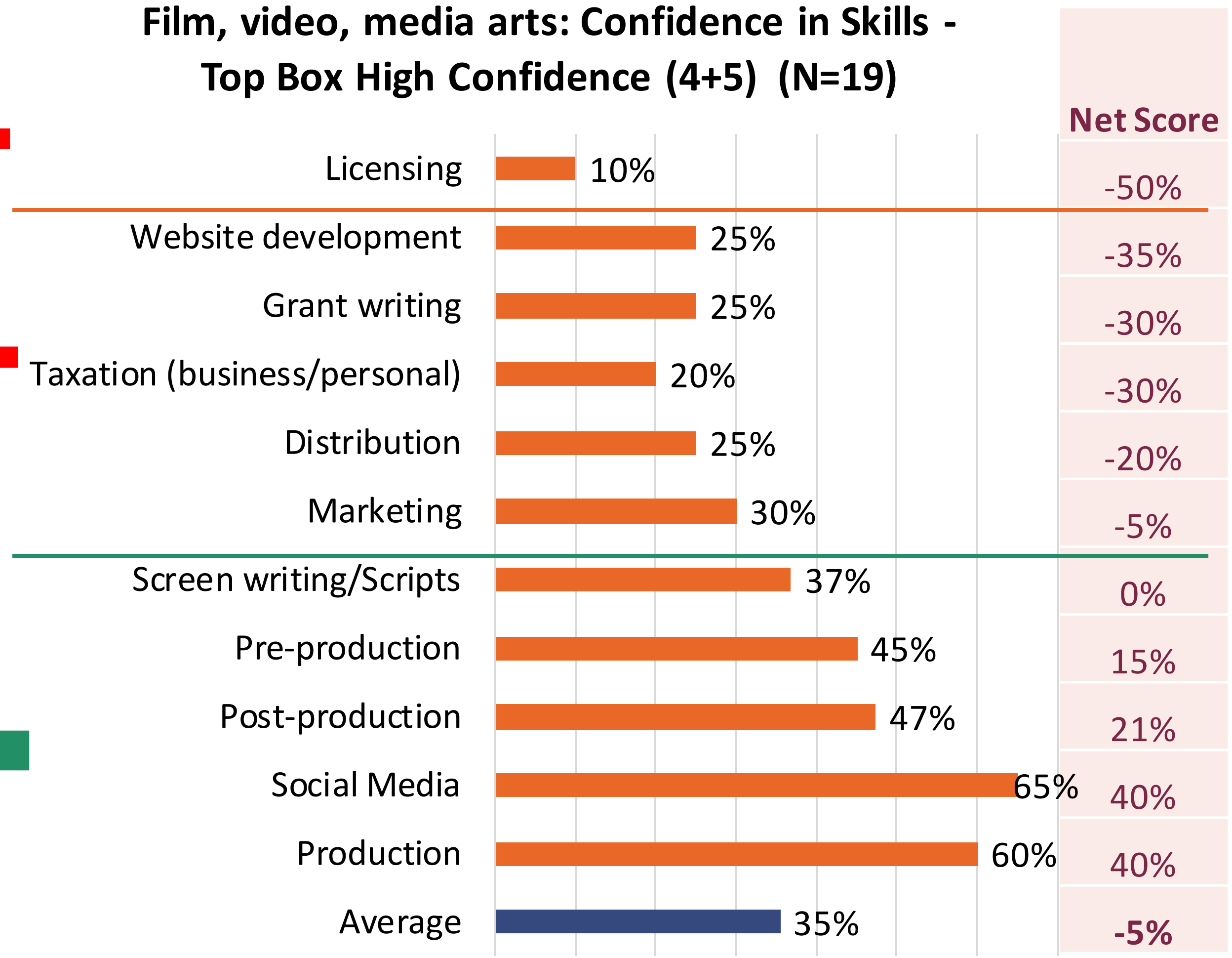
All areas show low confidence when subtracting the bottom box from the top box to arrive at the Net Score.

The majority of skills to sell product outside the local area received a negative net scores above -50%. Naturally, many artists have little aspiration to move beyond their local markets if they are seeking to sell their products.

Visual arts and craft are by far the largest group of respondents with a mix of professional artists, teaching artists and hobbyist. While the visual arts span many different artistic genres that require unique technical skill sets, the business skills tend to be common across genres.

Film, Video and Media Arts – Top Box Confidence and Net Score

strategic moves THINKING : BUSINESS



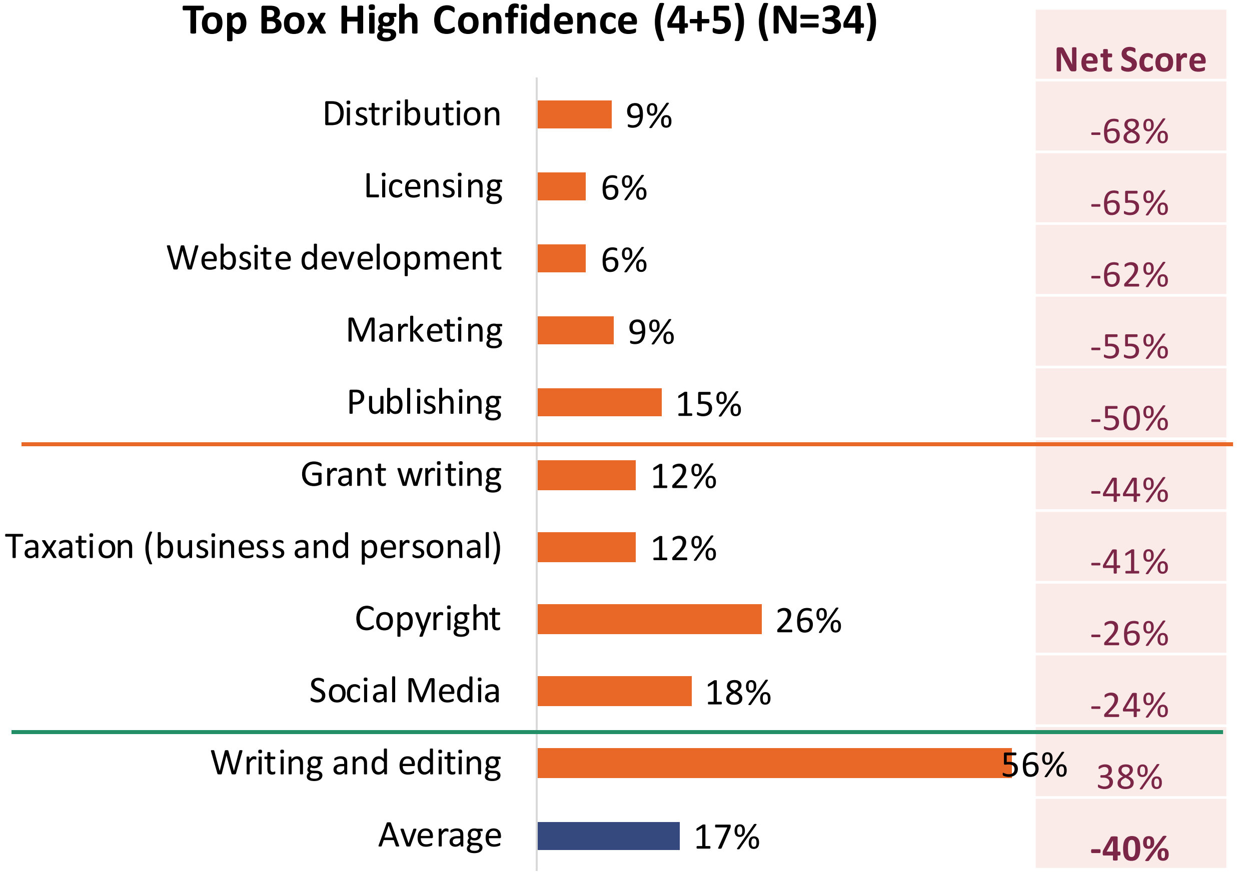
Respondents in the film, video and media arts sector are far more confident than any other sector, including performing arts which is a close second.

Respondents report quite high confidence in skills related to the creative process and social media.

Confidence in the business-related skills is significantly lower (but not as low a other sectors), with the lowest score for licensing.

Literature and Writing – Top Box Confidence and Net Score

Literature and Writing: Confidence in Skills - Top Box High Confidence (4+5) (N=34)

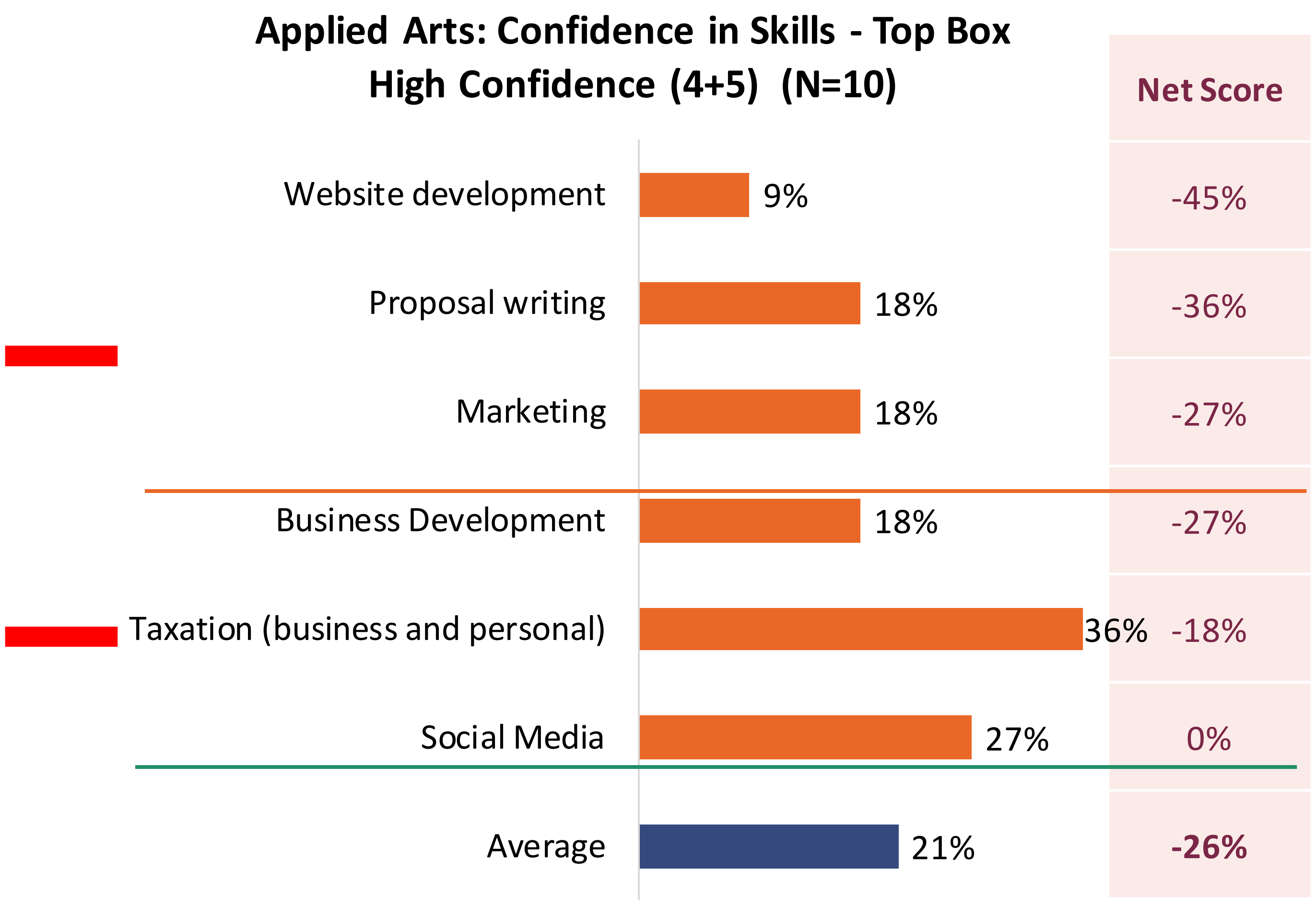


Those in the writing field are very confident in their writing and editing ability.

Like most other sectors, they do not maintain that high confidence in any other area, whether it relate to technical aspects like copyright, or publishing and distribution.

They also report low confidence in grant writing, marketing and other general business skills.

Applied Arts – Top Box Confidence and Net Score



While several industries are represented 90% also work as graphic designers. Despite this, they report low confidence in marketing and web development.

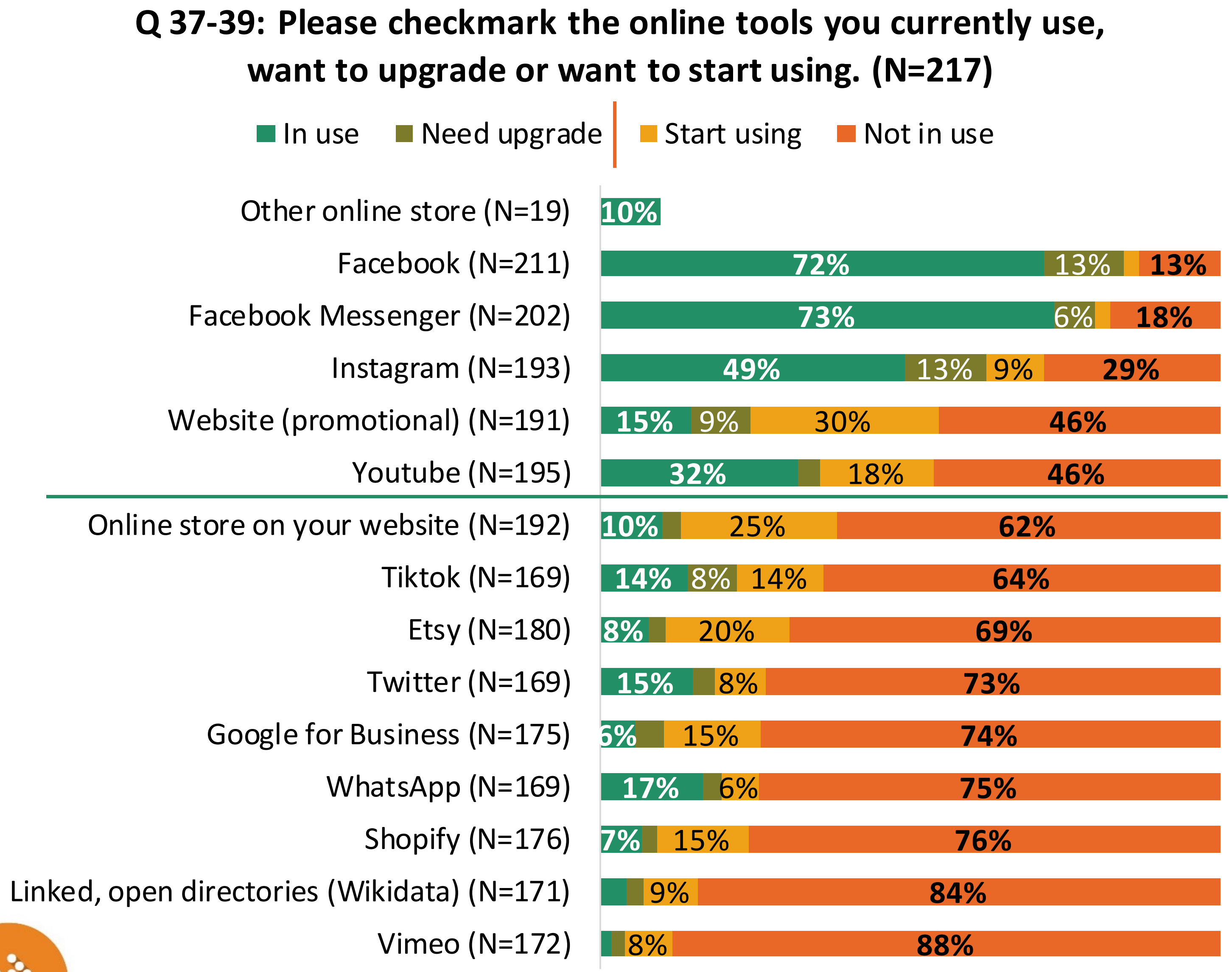
Like most other creative sectors, they report low confidence in their skills related to the business of their chosen endeavour.

Status of Digital Tools

Artists Survey

Top Social Media Sites/Services Most Used

strategic moves THINKING : BUSINESS



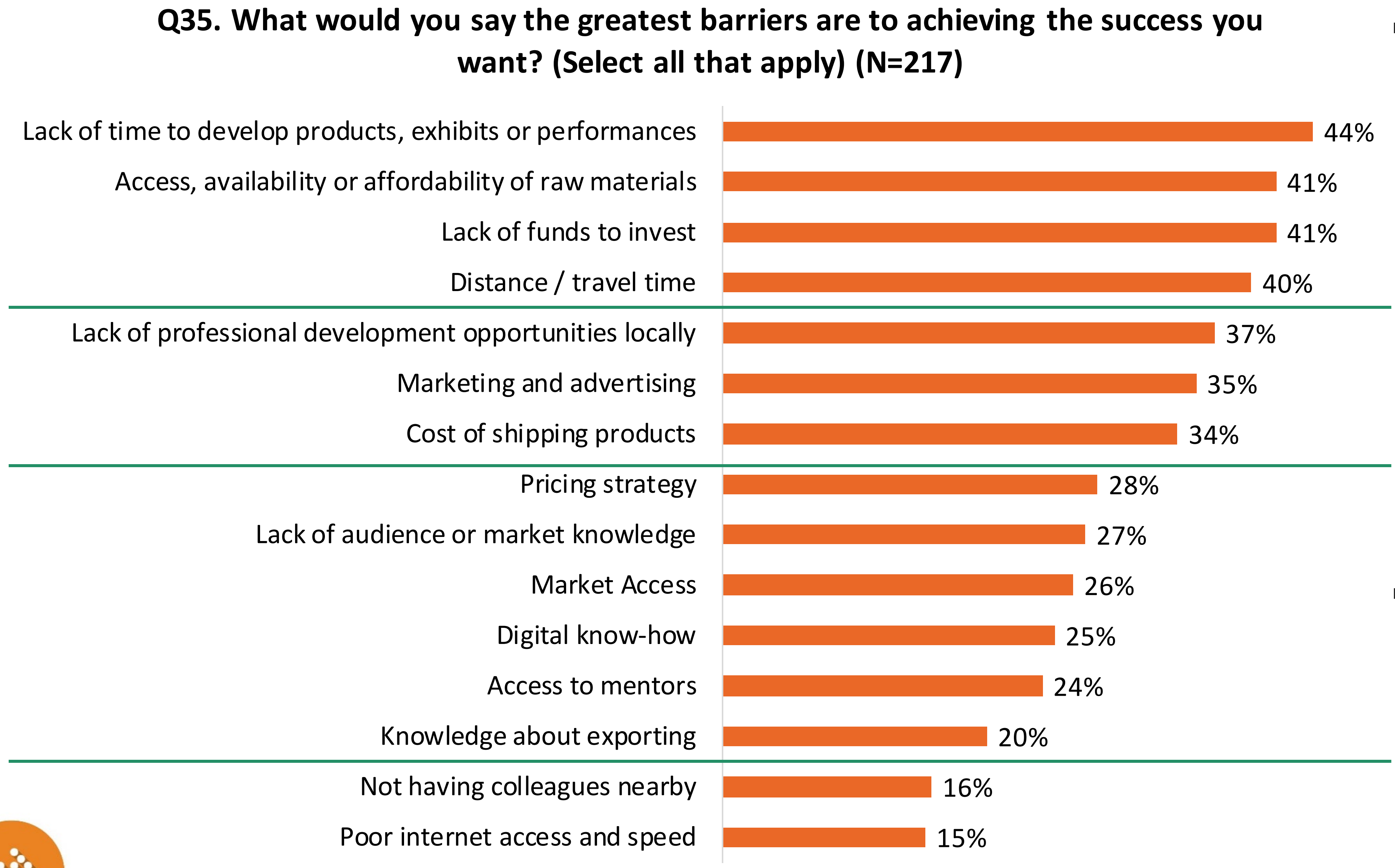
Take note of the (N) of respondents to each service. That non-response likely means they are not using the tool. Also each artist or maker has to determine which tools are most useful to them to achieve their own goals. This question does not suggest that every artist should be everywhere!

- Facebook is the dominant social network followed by Instagram, with 13% of users desiring upgrades.
- 1 in 3 want to start using a website and 9% wish to upgrade their site; 1 in 4 want to create an online store on their site, with another 15% wanting to start using Shopify.
  - Of those who want to start an online store, 42% are thinking about Shopify, 48% about Etsy and 33% about using both
- Two crucial digital tools that are not widely used, but should be are Linked, open data directories (Wikidata) and Google for Business.
- Youtube is more widely used than having a website; and it is the preferred video network over Vimeo.

Barriers to Success and Potential Shared Services

Artists Survey

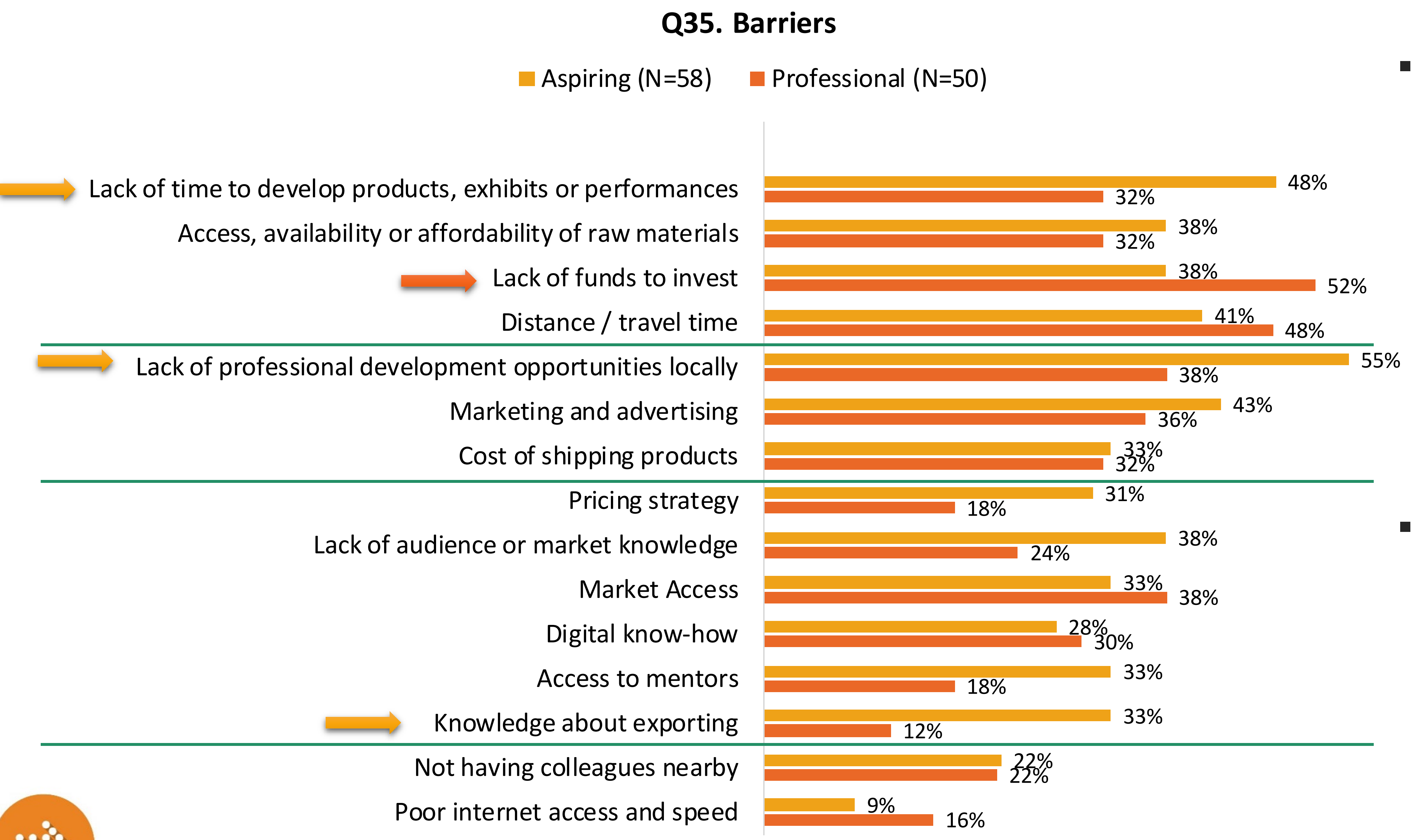
Greatest Barriers



- Barriers are more of less pronounced in different locations, but relatively consistent across locations, except:
  - Churchill – cost of shipping product 46% (top 4)
  - Thompson – Market access 42% (top 4)
  - Small towns outside the big 4 – Lack of pro dev locally 53% (#1)
- Respondents in Churchill identified with 4.9 of these barriers while those in smaller town outside the Big 4 identified 4.2.

Barriers by Level of Practice

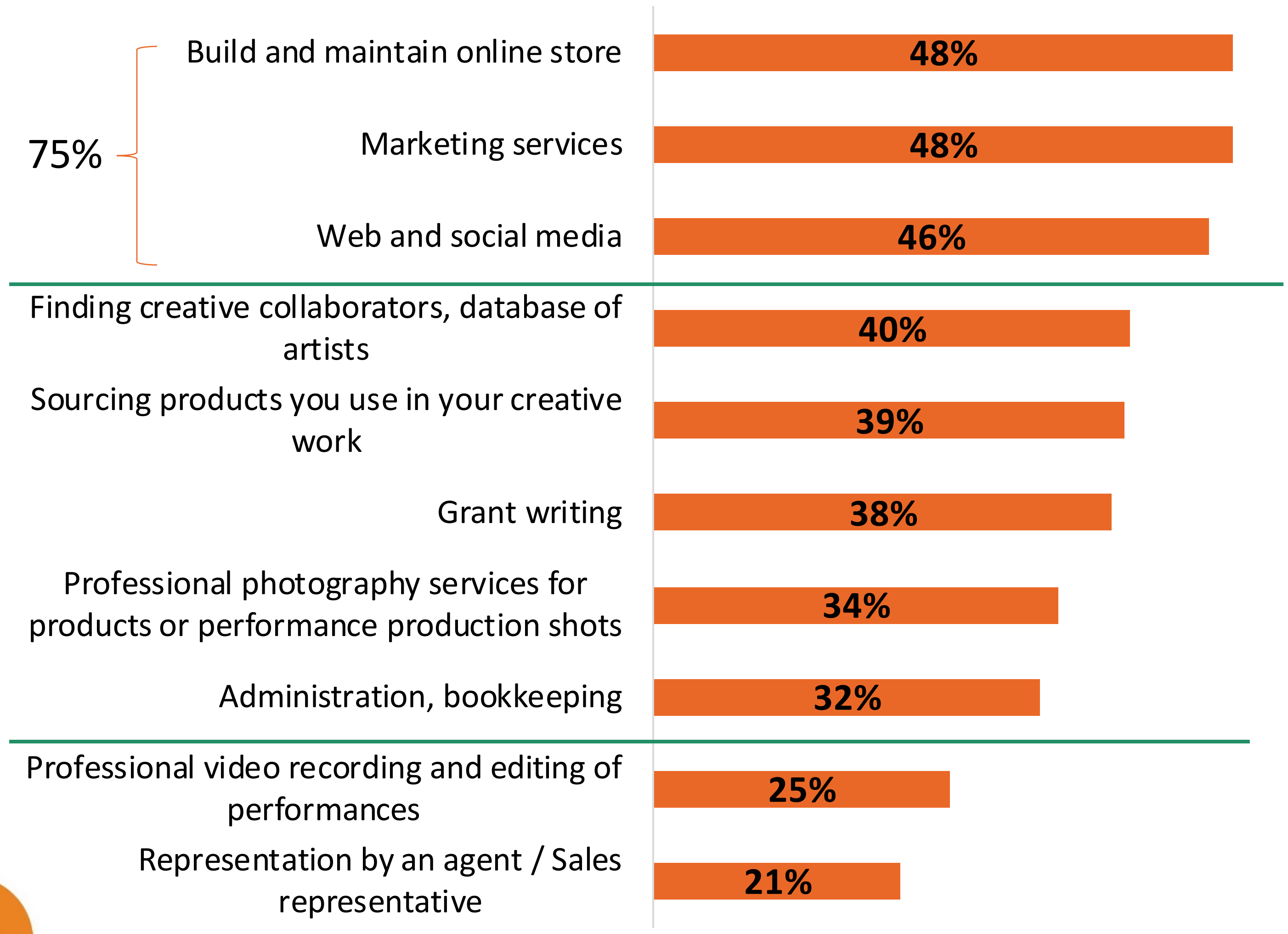
strategic moves THINKING : BUSINESS



- By career stage/level of practice there are some intuitive differences in terms of identified barriers. Given the size of the subgroups, all results are statistically speaking within the margin of error, as the range for the sample size is about + / - 12%
- Those in Community Arts reported 5.5 barriers on average, aspiring professionals reported 5.2, but professionals reported only 4.5 while hobbyists cited 4.4 barriers.

Interest in Potential Shared Services

Q36. Check mark any areas where you feel you would benefit from shared services (N=200)

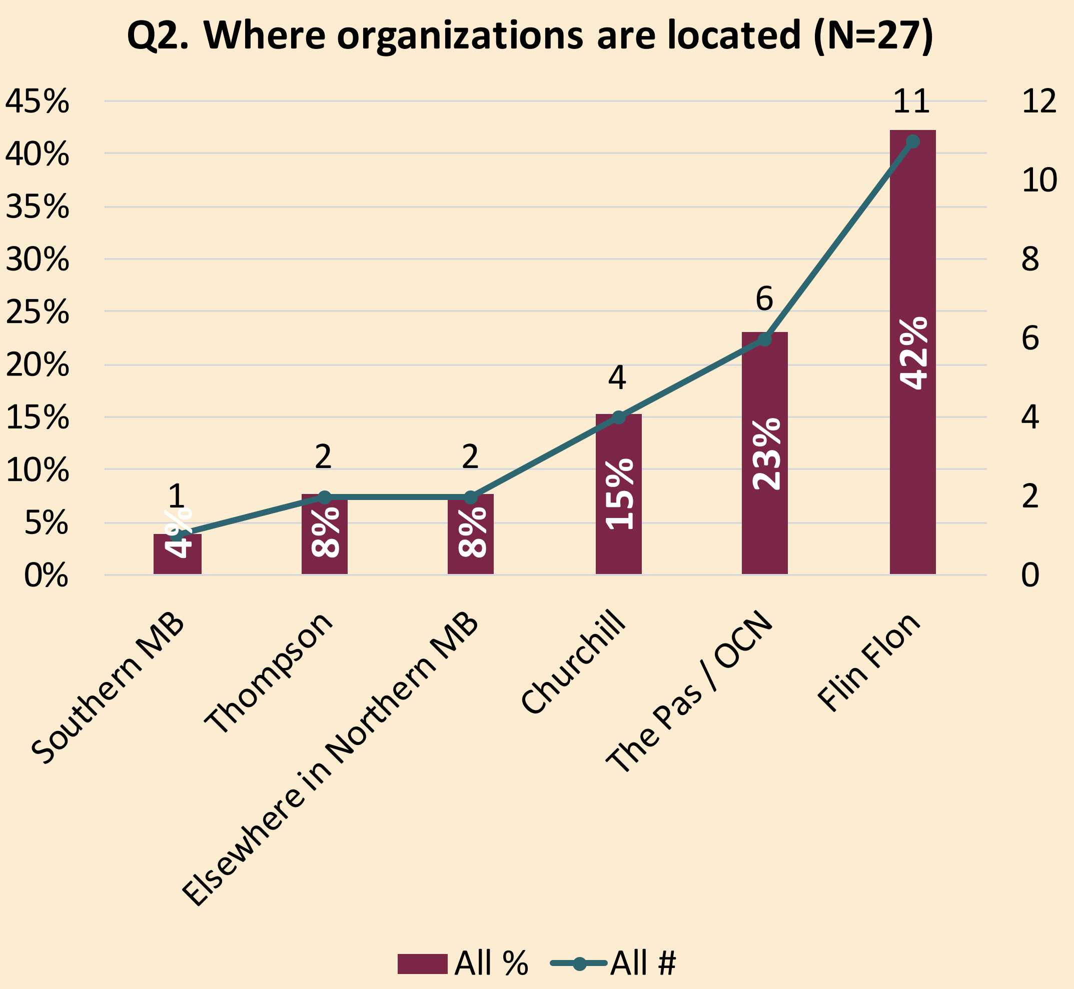


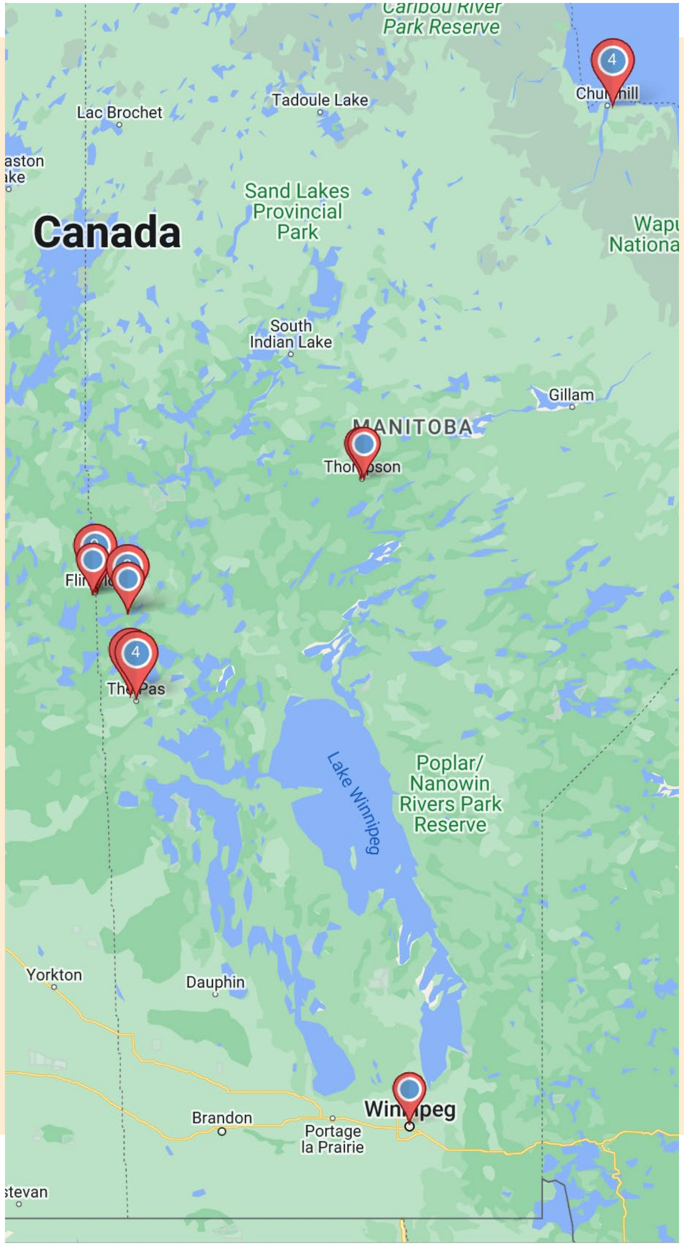
- Digital and marketing services are most favoured for shared services with a combined 75% of respondents identifying one or several of the top 3.
  - This points to a potential opportunity to consider a service offering, or spin off a social enterprise that can develop standardized high quality services and provide Northern artists with hands-on *pro bono* (should funding be available) or *fee-for-service* work.
- Other areas also have a large enough need to consider developing a shared services model for those, such as grant writing and bookkeeping.
- Importantly, the motive is not always purely about commercial return: those in Community Arts reported greatest interest in shared services with 4.9 on average, aspiring professionals reported 4.5, but professionals reported only 3.8 while hobbyists cited 3.4 shared services.

Survey of Arts Organizations

Organizational Characteristics

Location of Arts Organizations





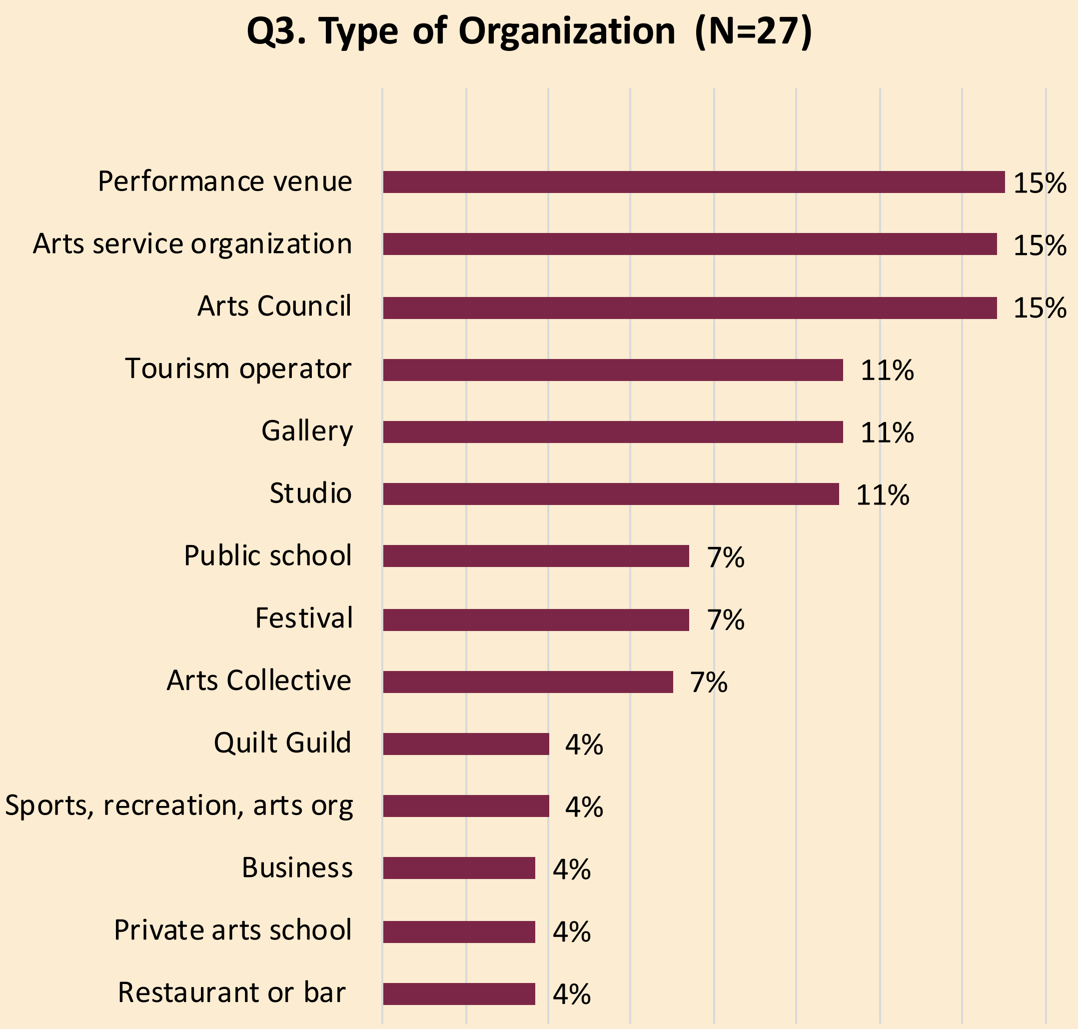
Flin Flon has a large number of arts organizations, which supports a large number of artists, despite its smaller overall population.

Churchill despite its small population has a large arts community.

The Pas/OCN and Thompson are the largest centres, featuring significant arts populations.

Great diversity of organizations active in the arts

strategic moves THINKING : BUSINESS

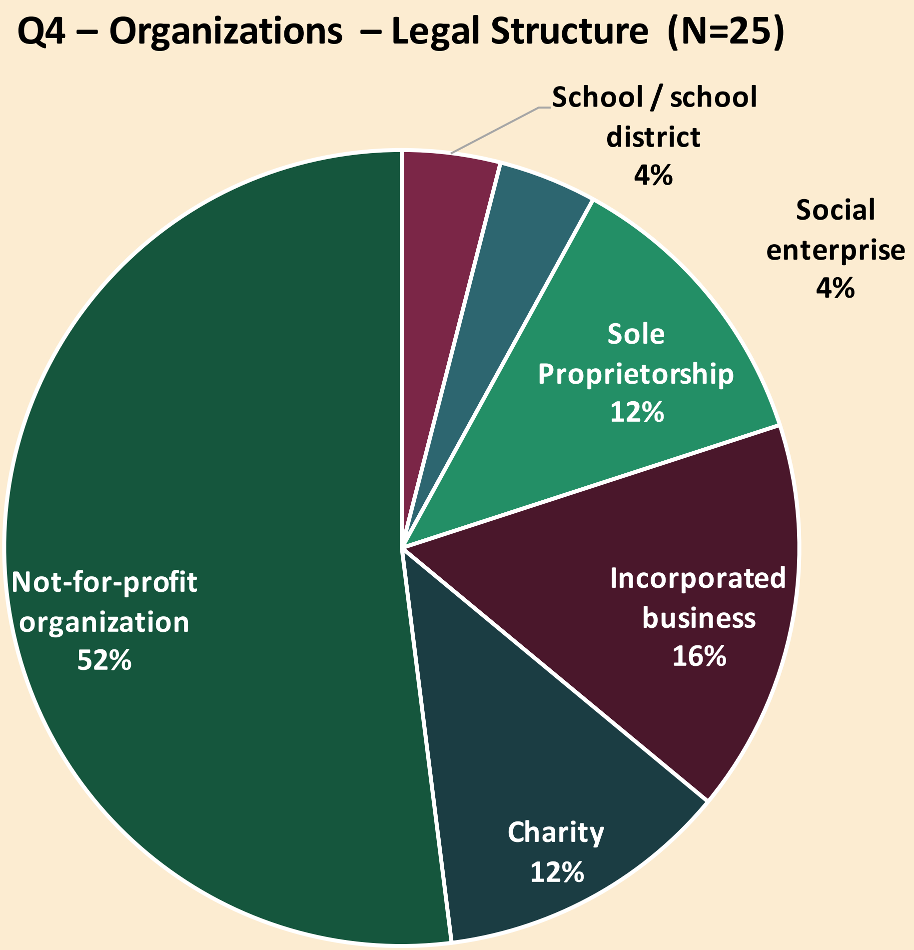


- There are many types of organizations that make up the arts eco-system.
- Larger organizations like arts councils serve multiple purposes and can have several spaces for exhibition, workshops, performances.

- Note: Give the base number (N) of 27 each individual selection is worth almost 4% points.

Organizational structure shows a mixed eco-system

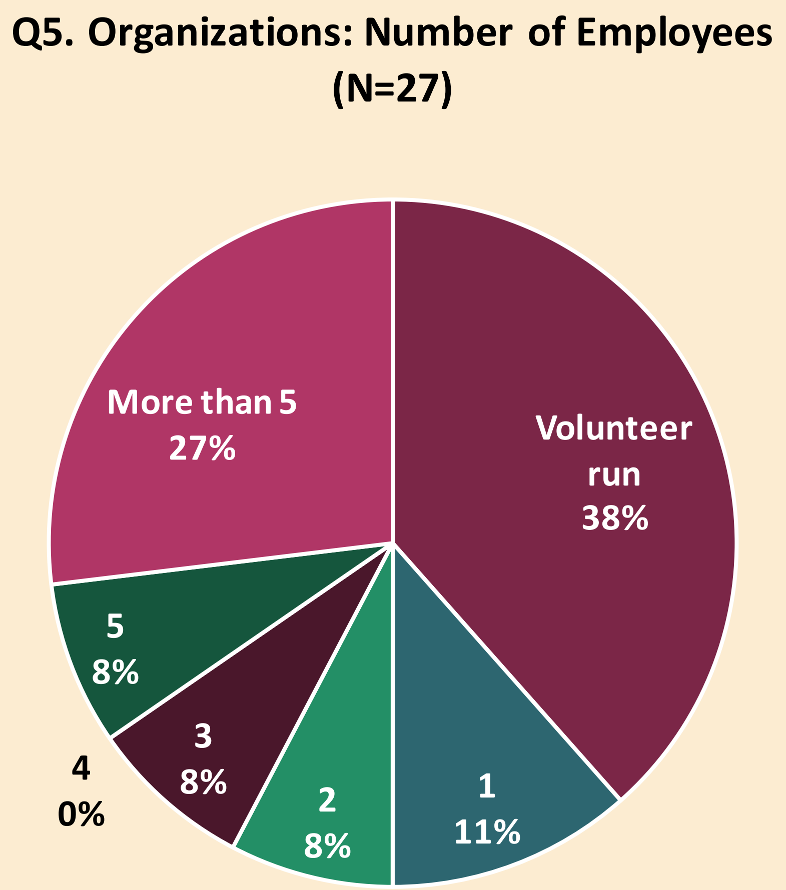
strategic moves THINKING : BUSINESS



- Respondents use a mix of legal structures to organize their work.
- Most are not-for-profits/charities that operate without a private profit motive for the public good.
- Some operate as businesses both incorporated or independent sole proprietors

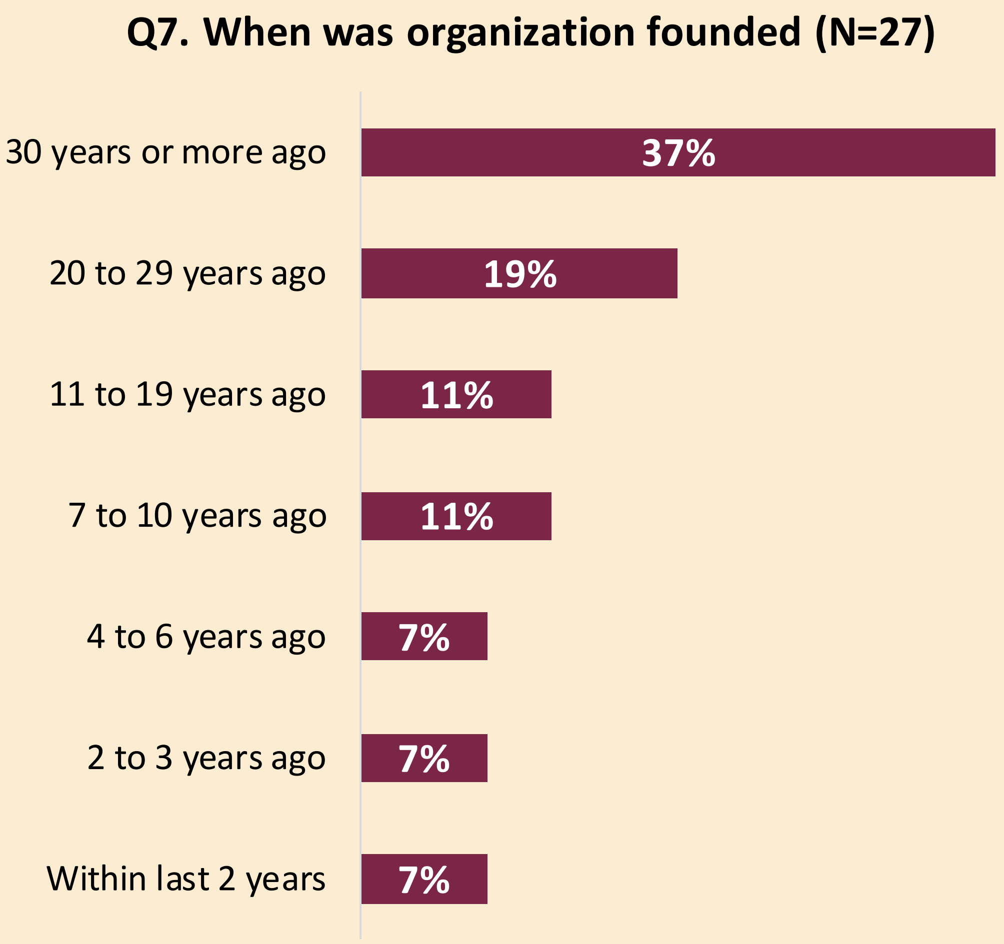
38% of arts organizations are volunteer run

strategic moves
THINKING : BUSINESS



- The 16 (62%) organizations that report having employees, have about 123 arts workers combined.

Arts Organizations are Stable with New Entrants in Recent Years

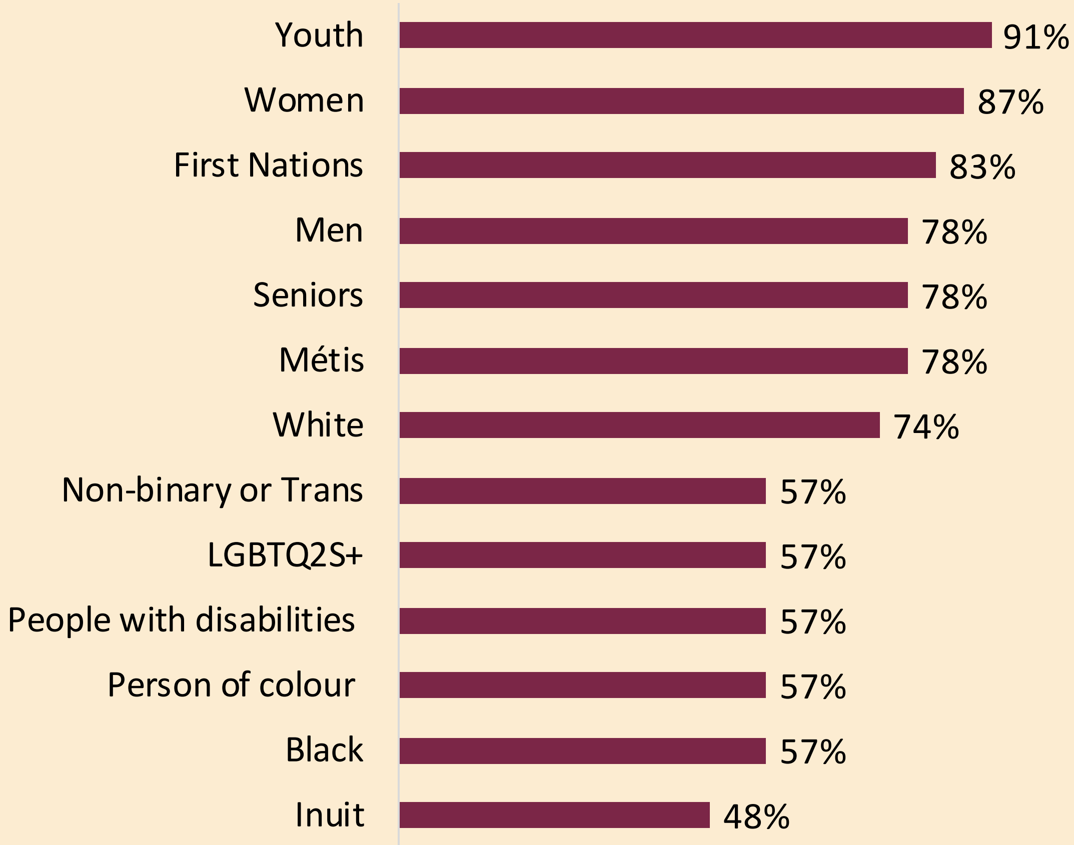


- 2 in 3 organizations are older than 10 years
- 1 in 5 responding organizations were founded within 6 years.

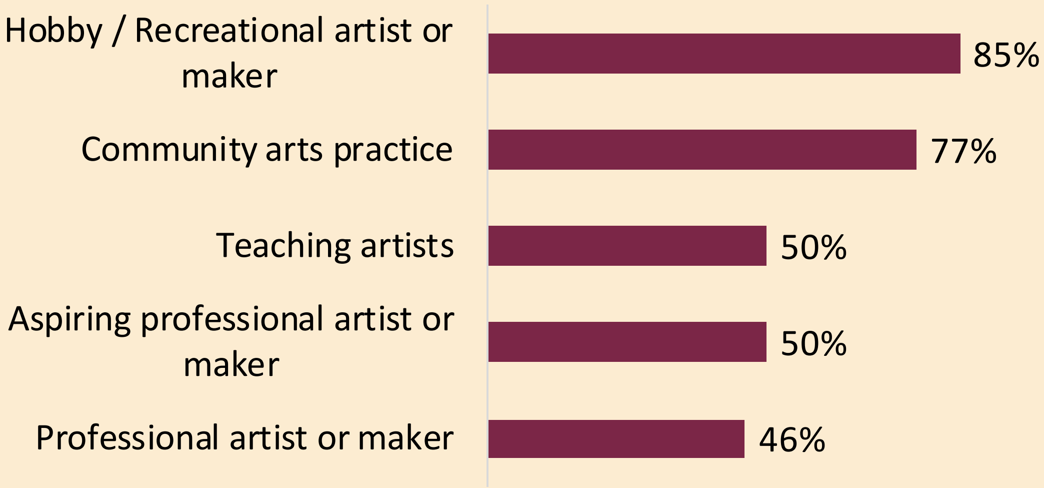
Organizations serve diverse publics and artists

strategic moves THINKING : BUSINESS

Q8. Groups your organization serves or has specific programs? (N=23)



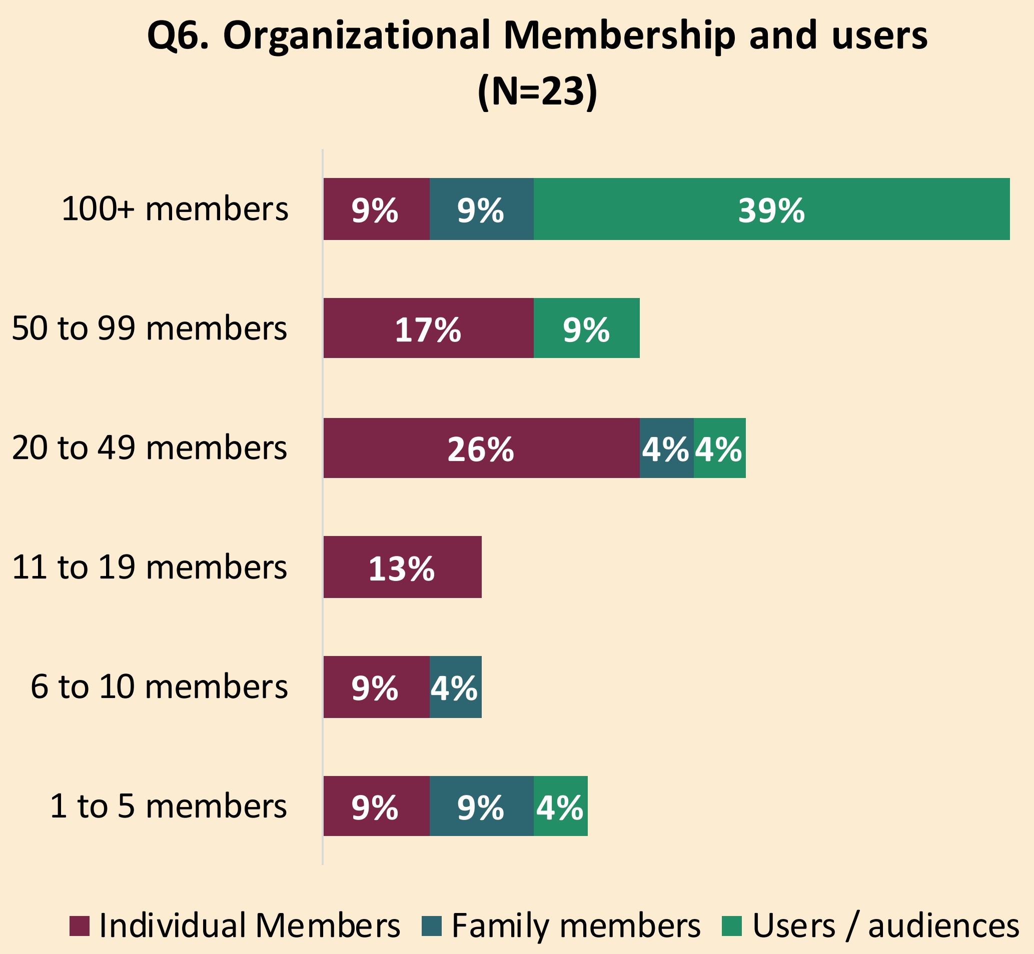
Q9. What type of artist does your organization primarily serve or support? (N=26)



Strong focus on Youth and Indigenous people. Recreational and Community Arts practices are two dominant practices served. Professional artists are served by half of these organizations.

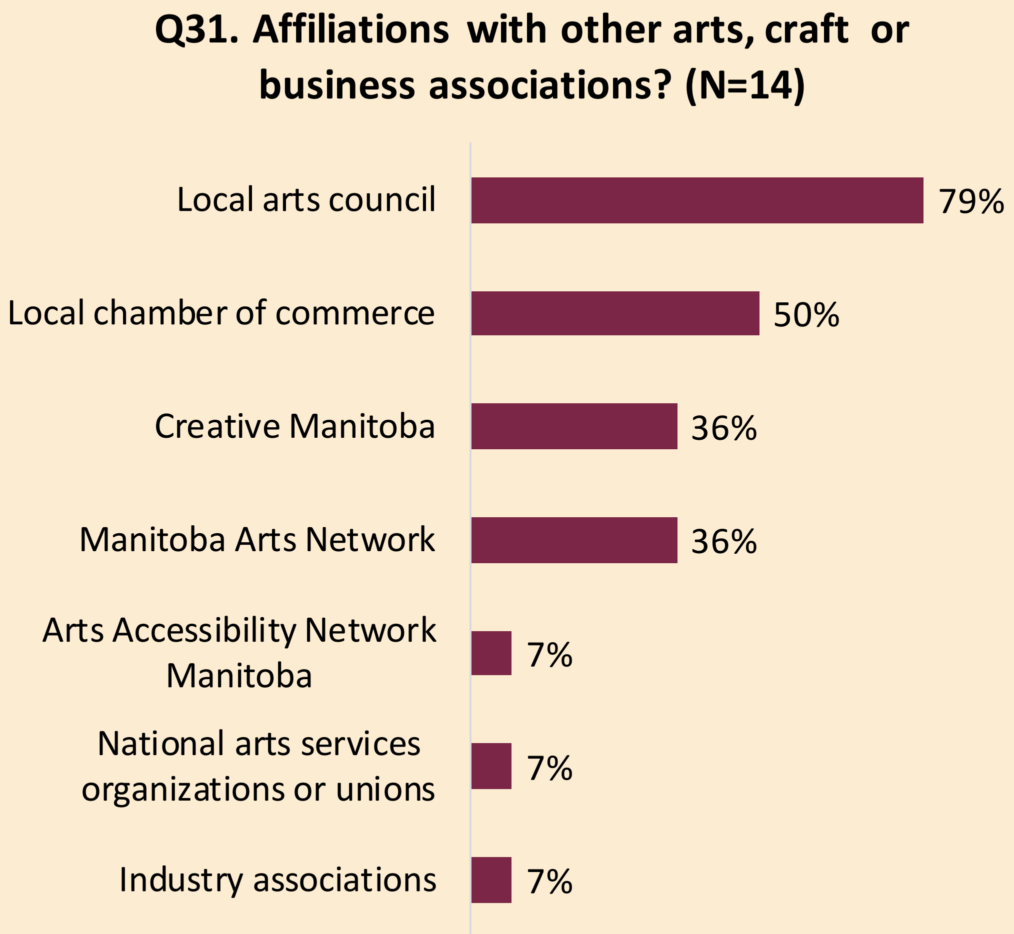
High Number of Members and Users

strategic moves THINKING : BUSINESS



- Arts organizations serve a large number of members and audiences.
- All organizations have members, some have other audiences as well (usually those that are presenting performances or exhibiting arts or offering public workshops, or organizing craft markets or festivals)
  - 9 organizations report user numbers well beyond 100, with some attracting several thousand users in the course of the year.

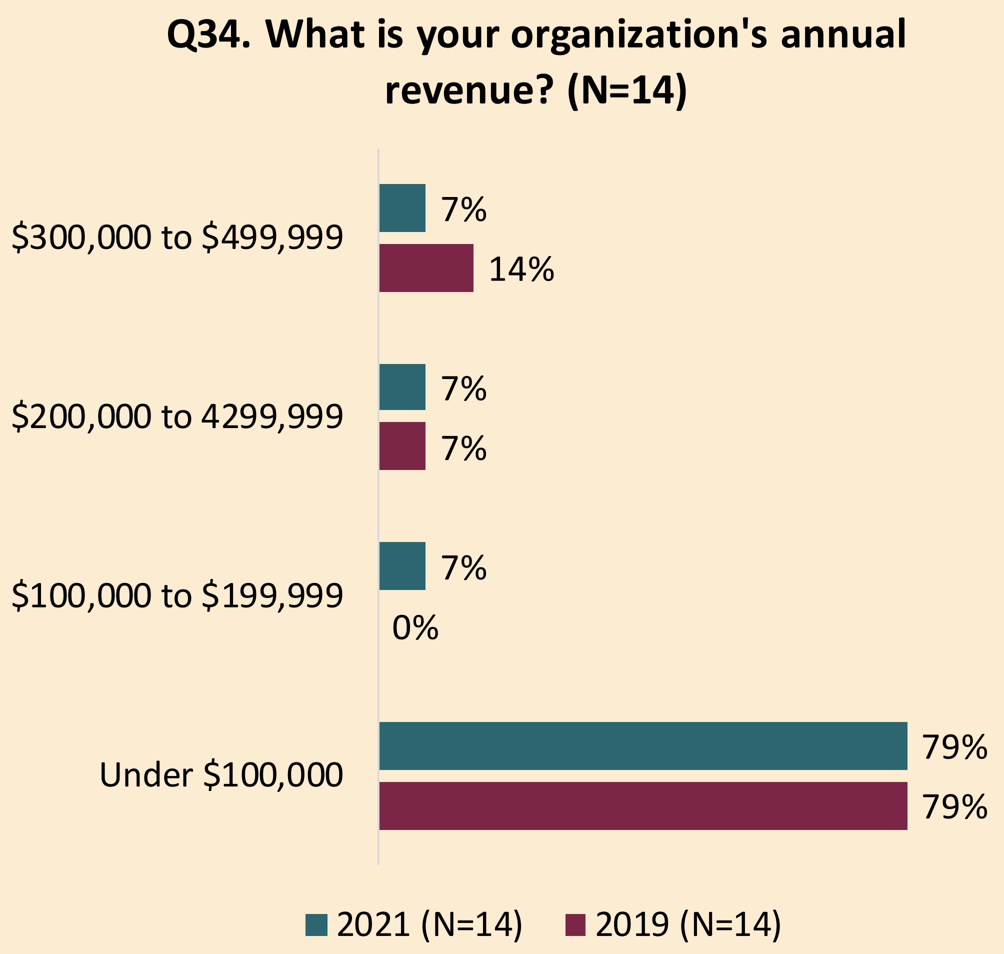
Arts Organizations are Connected to Each Other to Some Degree as Well



- Only half of the organizations responded, suggesting that they are not affiliated with others.
- The remaining half, is affiliated with just over two other organizations

About Half Responded to Annual Revenue Question

strategic moves THINKING : BUSINESS



- Vast majority have budgets of less than $100,000 annually.
- The breadth of services provided and activities offered is remarkable given the lack of financial resources to operate in a vast remote area such as Northern MB.

There are a number of examples of publicly funded arts organizations in small remote communities that through consistent public support have delivered a tremendous amount of value across artistic disciplines to their local economy and the well-being of the community and individuals; becoming destinations in and of themselves:

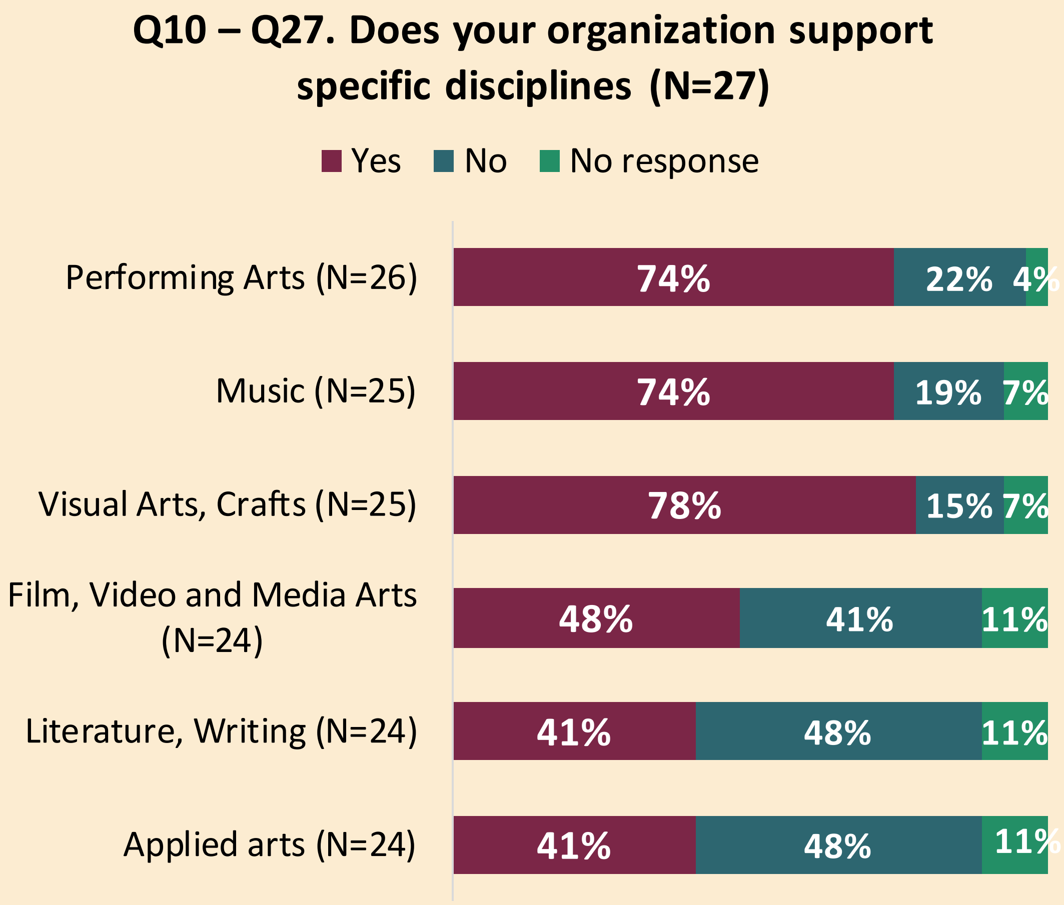
- Klondike Institute for Arts and Culture, Dawson City, YT, population: 1,700 - $1 mil budget (90% public, 10% earned)
- Island Mountain Arts, Wells, BC, population 400
- Tiny Lights Festival, Ymir, BC, population 800

Supporting Artistic Practices

Survey of Arts Organizations

Arts organizations work across disciplines

strategic moves THINKING : BUSINESS



- Arts Organizations support on average 3.5 of 6 disciplines.
- The three main ones include performing arts, and music.
  - Note: This includes presenting concerts – often with touring artists – and shows, more than producing local shows with local talent.
- Visual arts / craft are supported by the largest number of organizations, which matches the large number of visual artists and makers in the artist survey.

Organizations' Involvement with Genres Very Broad

Performing Arts		Music		Visual Arts / Craft		Film, Video, Digital Media		Writing, Literature		Applied Arts	
Concerts	**79%**	**Folk**	**81%**	**Painting**	**82%**	**Documentary**	**78%**	**Poetry / Spoken Word**	**88%**	**Photography**	**75%**
Theatre	**63%**	**Rock or Pop**	**69%**	**Jewellery**	**76%**	**Short films**	**56%**	Fiction	**38%**	**Graphic Design**	**63%**
Musical Theatre	**53%**	**Classical**	**63%**	**Beadwork**	**71%**	Media arts	**37%**	Non-fiction	**38%**	**Fashion**	**50%**
Storytelling / Spoken Word	**42%**	**Country / Blue grass**	**63%**	**Fibre/ Fabric**	**65%**	Feature films	**33%**	News or community papers	**38%**	Architecture	**13%**
Dance / Ballet	**37%**	Jazz	**44%**	**Photography**	**59%**	Virtual Reality	**11%**	How-to book, Cookbook	**13%**	Industrial	**0%**
Improv	**26%**	Blues	**38%**	**Paper arts**	**59%**	Video games	**0%**	Magazines	**0%**	Design	
Puppetry	**0%**	Hip Hop/Rap	**38%**	**Leather / Hides / Fur**	**53%**	Augmented Reality	**0%**	Playwrighting	**0%**		
Opera	**0%**	Reggae	**25%**	**Sculpture**	**53%**						
		Electronic	**25%**	Wood	**35%**						
		Soul / R&B	**19%**	Ceramics - Pottery	**35%**						
				Stone	**35%**						
				Metal	**29%**						
				Glass	**24%**						
N=	**19**	**N=**	**16**	**N=**	**17**	**N=**	**9**	**N=**	**8**	**N=**	**8**

Organizations Involved in Disciplines in Many Ways

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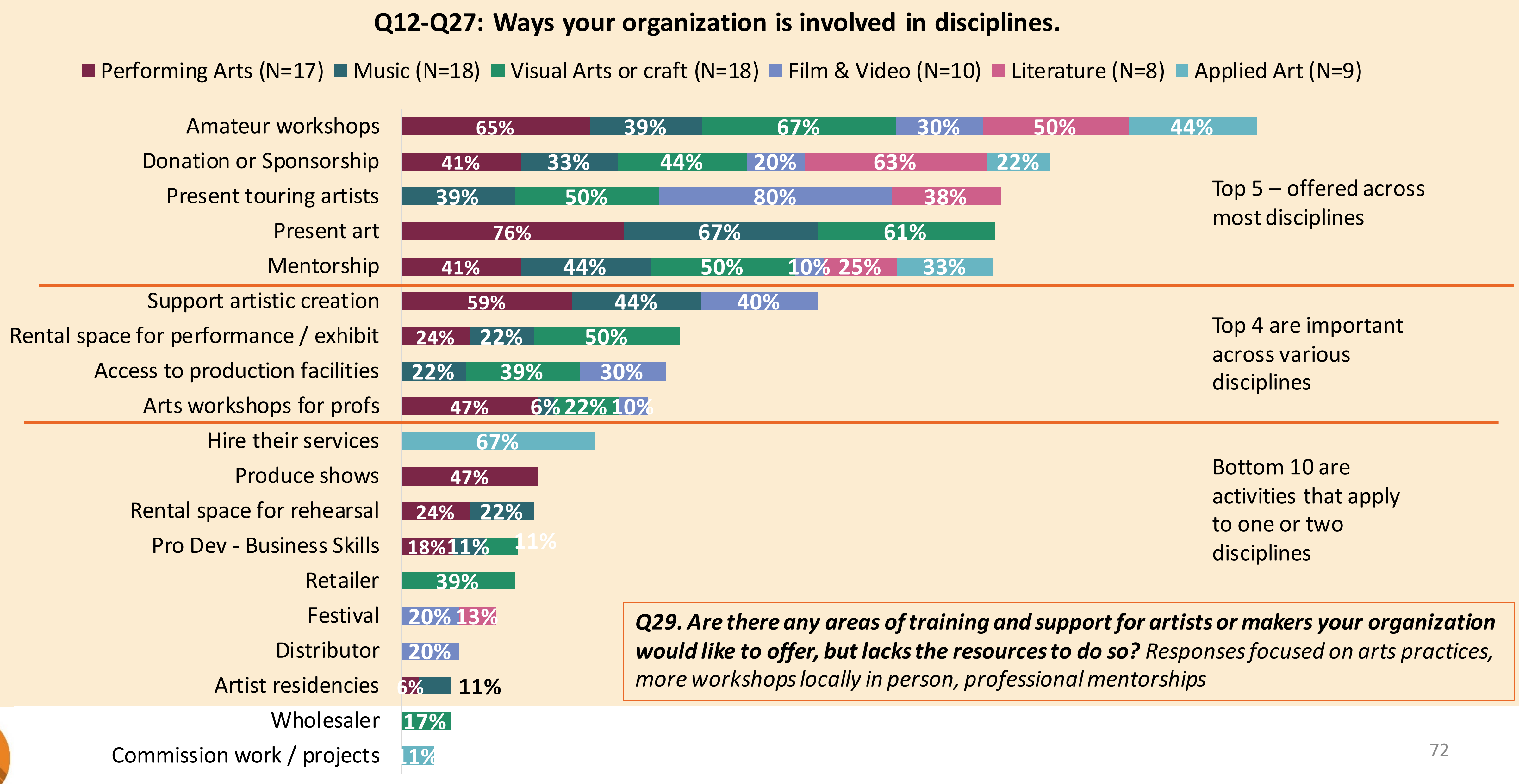


Top 5 – offered across most disciplines

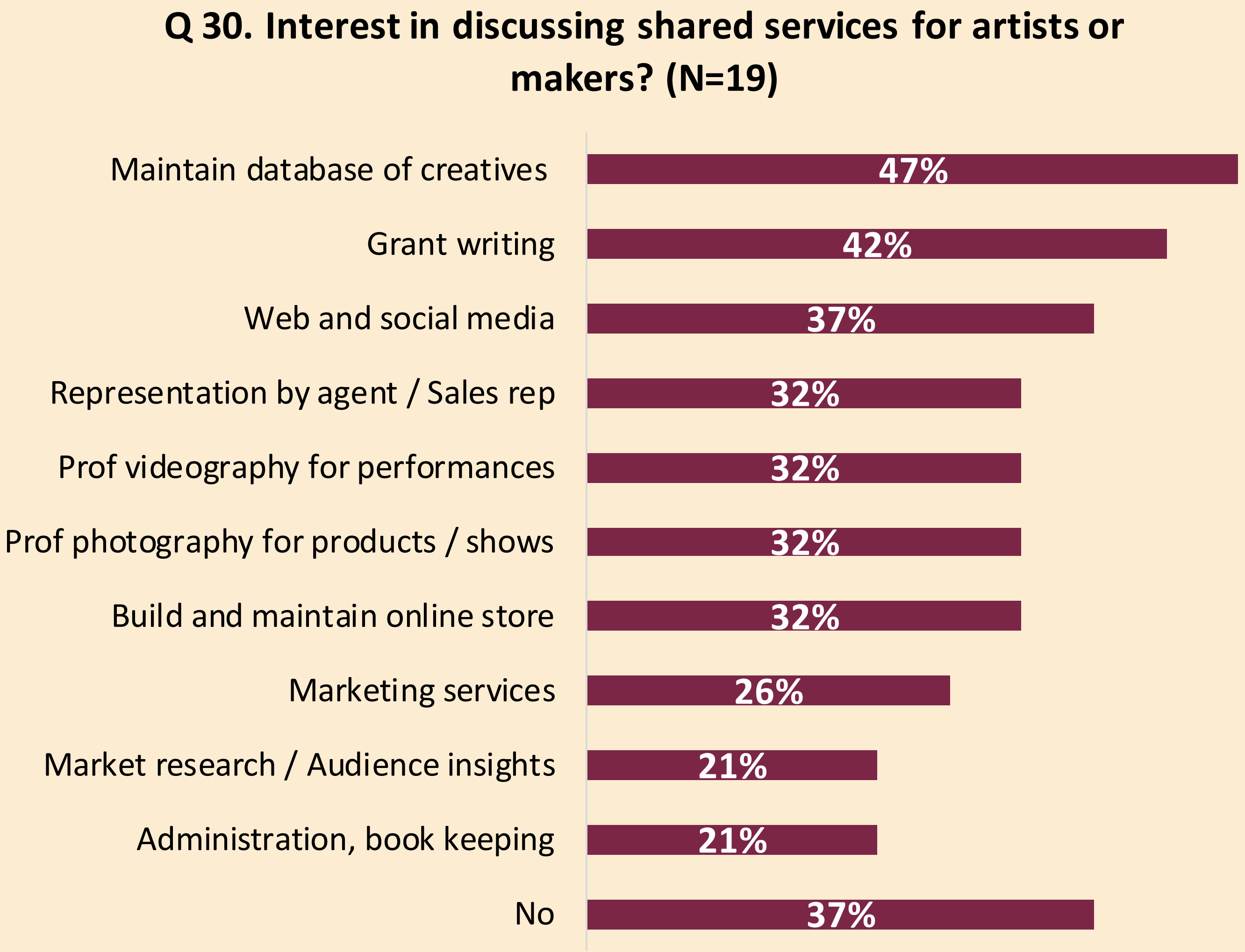
Top 4 are important across various disciplines

Bottom 10 are activities that apply to one or two disciplines

Q29. Are there any areas of training and support for artists or makers your organization would like to offer, but lacks the resources to do so? *Responses focused on arts practices, more workshops locally in person, professional mentorships*

Interest in Exploring Shared Services for Artists

strategic moves THINKING : BUSINESS



- 63%organizations in total are interested in discussing participating in or offering shared services for artists and makers in some of these areas.
- Each organization has their own priorities.
- Some areas, like these 6 – web and social media could combine well building and maintaining an online store, marketing services, and audience insight along with professional video- and photography of products and performances.
- Building an accessible and comprehensive database of artists, makers and creatives is an obvious collaboration opportunity.

Supply of Raw Materials and Tools and Sales

Survey of Arts Organizations

Organizations Identify Local Suppliers for Artists Materials and Tools

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Local Retail	Local Arts Council	Local Wholesale	Local supplier / individual / facility
Walmart	Churchill AC	Arctic Trading Company	McPhee Quiltworks
Giant Tiger	Flin Flon AC	Uptown Emporium	Nadine Morrison, longarm operator
Dollar Store	The Pas AC		Roy Mexted
Gales Wholesale			
Arctic Trading Company			
Northern Lights Store			
Churchill Home Building Centre			

Organizations Identify Sales Avenues for Artists / Makers

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Festivals	Retail stores	Online stores	Christmas Markets	Seasonal markets
Aurora Winterfest	26 Feathers	Arctic Trading Company Inc	Creighton Christmas Craft Sale	Annual Leisure & Trade Show
Blueberry Jam Music Gathering	Aboriginal Friendship Centre	Etsy		Arts and Craft Sale
Culture Days	ArcticTrading Company Inc	Mall of The Arts	Christmas craft sale @ TRCC	CHTM Trade show
The Pas Music & Fine Arts Festival	Chicken Chef	Personal websites	Christmas Flurries	CJGC Spring Pop Up Market
Tourist Bureau & Stage, Main St	Funky Threadz	Uptown Emporium	Christmas Arts and Craft Sale in Cranberry Portage	Cranberry Portage Artisan Market
Trout Festival Main Street Days	Great White Bear	Tourism operators	Craft sale at Juniper center	Creative Collective
Galleries	Lazy Bear	Bakers Narrows Lodge	Craft sales at boreal forest center	Farmers market
Arctic Trading Company Inc	North of 58	Discover Churchill	Flin Flon Community Hall	Garage sales or inhouse
Discover Churchill Gallery	Northern Store	Flin Flon museums	Flin Flon Craft Show	Round the Bend Farm
Framed Expressions	NORVA	Flin Flon Tourist Bureau	Metis Hall	Wild Things Market
NorVA Centre	Orange Toad	Rocky View Lodge	CJCG Christmas Pop Up Market	Markets in Flin Flon
Sam Waller Museum	Polar Inn boutique	The Pas OCN		
	Uptown Emporium	Tourist Bureau		
	Wapusk General Store			
Performance spaces				
City Center Mall	Johnny's Social Club	Norlite Hall	Flin Flon Community Hall	The Pas Legion
Bakers Narrows Lodge	Kelsey School Division schools	Our Lady of the Sacred Heart Cathedral	R.H. Channing Auditorium	Town Theatre
Blueberry Jam Stage	Le Pas de Danse (330 Edwards)/ Opasquia school	Pioneer Gallery	Rotary Wheel	TRCC Rec Center
Christ Church	Letkeman Theatre	Pioneer Square	Royal Canadian Legion Center	Uptown outdoor stage
Churchill Town Complex	Main Street (uptown in spring/summer)	Pioneer Square (outdoor)	T of C Complex Theatre, Gym	Westminster Church
Cranberry Portage Legion	Metis Hall	Creighton Community Hall	Hapnot Collegiate	