

Analysis of the benefits of the arts in Saskatchewan

Prepared for the Saskatchewan Arts Alliance and SK Arts



Saskatchewan
Arts Alliance

Speaking up for the arts since 1984.



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Introduction

This report provides a summary of Saskatchewan-specific data and qualitative information gathered during an intensive but short-term process of data analysis and research in May and June of 2022.

In general, this report uses the terms “culture” or “arts and culture” to describe activity in the arts, culture, and heritage, including artistic and cultural festivals. The report follows the definition of the culture sector provided in Statistics Canada’s [Conceptual Framework for Culture Statistics](#): “creative artistic activity and the goods and services produced by it, and the preservation of heritage” (p. 9). Statistics Canada includes six main cultural areas (which it calls “domains”, p. 10):

- Heritage and libraries
- Live performance
- Visual and applied arts
- Written and published works
- Audiovisual and interactive media
- Sound recording

In addition, Statistics Canada includes three other supporting domains:

- Governance, funding, and professional support: This includes, among other items, all government-owned cultural venues (which are therefore not counted in other areas, e.g., heritage and libraries, live performance, visual and applied arts, etc.).
- Education and training
- Multi domain (for items that could not be allocated to a specific domain)

Where possible, the analysis breaks down the statistics to focus on the impacts of the arts (separate from other areas of culture and heritage).

Direct economic impacts of the arts, culture, and heritage

Since 2010, Statistics Canada and its partners (including provincial government representatives) have produced national and provincial estimates of the direct economic and employment impact of culture. These *Provincial and Territorial Culture Indicators* (PTCI) were updated in early June of 2022, providing estimates for 2020 – the first year of the COVID-19 pandemic.

Methods

Statistics Canada [notes that](#):

Culture GDP is the economic value added associated with culture activities. This is the value added related to the production of culture goods and services across the economy, regardless of the producing industry. Culture jobs are the number of jobs that are related to the production of culture goods and services.

The data capture direct impacts only, which represent the value added to gross domestic product (GDP) and employment of direct expenditures in the sector. Estimates of the direct impacts tend to be relatively modest, because they exclude commonly captured elements such as indirect impacts (the re-spending of the expenditures of cultural organizations) and induced impacts (the re-spending of wages earned by cultural workers and suppliers' workers). There are benefits to this narrower approach: the estimates are comparable to other provinces and the GDP of other sectors of the economy.

Statistics Canada provides two sets of related estimates:

- The *culture products* estimates examine the production of culture goods and services from establishments in both culture and non-culture industries.
- The *culture industries* estimates capture the production of culture and non-culture goods and services from establishments within the culture industries. Of note, Saskatchewan's industries-based estimate was 9% higher than the product-based one in 2020.

This summary presents both sets of statistics and focuses on the culture industries estimates when making comparisons with other sectors of the Canadian economy. Statistics Canada has previously stated that "the industry perspective of the PTCI is more comparable to GDP by industry" than the product perspective.

An estimate of the value added of the arts (i.e., separate from other cultural and heritage elements) is not possible from the data, since many elements of the arts are combined into broader categories with other cultural and heritage elements.

The data in this summary are drawn from Statistics Canada's detailed tables related to *Culture and sport indicators by domain and sub-domain, by province and territory, [product perspective](#)*

(Table 36-10-0452-01) and industry perspective (36-10-0453-01). Overall GDP and jobs were obtained from [Table 36-10-0221-01](#) and [Table 36-10-0480-01](#), and comparative data for other economic sectors were calculated using sectoral proportions available in [Table 36-10-0400-01](#).

Direct economic impacts in Saskatchewan in 2020

Culture products: nearly \$1 billion in direct impact from the production of culture goods and services from establishments in both culture and non-culture industries

Based on Statistics Canada's product perspective, the direct economic impact of culture products in Saskatchewan is estimated at \$896 million in 2020, which equates to \$760 per capita or 1.2% of provincial GDP. The value added of culture in Saskatchewan is well below the national average (1.2% in SK vs. 2.7% nationally).

Between 2010 and 2020, the GDP of culture products grew by 15% in Saskatchewan, even with a 6% drop between 2019 and 2020. However, the overall rate of growth is below the 19% inflation in Saskatchewan between 2010 and 2020. (None of the figures in this summary have been adjusted for inflation.) Similar growth in the overall provincial economy resulted in no change in culture's share of the provincial economy (1.2% in both 2010 and 2020).

The PTCI also provides an estimate of the GDP of sports products in 2020 (\$213 million, or 0.3% of the province's GDP). The value added of culture (\$896 million) is over four times larger than the sports estimate.

Culture products account for over 2% of all jobs in Saskatchewan

The estimate of culture jobs is 11,200 in 2020, or 2.1% of all jobs in the province. The jobs estimate, which includes both full-time and part-time positions, is much lower in Saskatchewan (2.1%) than nationally (3.4%).

Between 2010 and 2020, the number of jobs associated with culture products decreased by 4%, due to a 10% decrease in the first year of the pandemic (2020). Prior to the pandemic, the number of culture jobs in Saskatchewan had increased by 6% between 2010 and 2019.

In 2020, the jobs estimate for culture products (11,200) is over four times larger than the equivalent estimate for sports products (2,700).

Culture industries: \$1 billion in direct impact from the production of culture and non-culture goods and services from establishments within the culture industries

From the industry perspective, Statistics Canada estimates that the direct contribution to GDP was \$977 million in Saskatchewan in 2020, or 1.3% of provincial GDP. (As noted above, the industry estimate is 9% higher than the products estimate, which has become the more

commonly used estimate.) In 2020, there were 11,800 jobs directly related to culture industries in Saskatchewan, or 2.2% of the province's jobs.

In Saskatchewan, the GDP of culture industries (\$977 million) is similar to the impact of accommodation and food services (\$1.1 billion) – two sectors that were hit hard by the pandemic. The value added of culture is less than that of the information and communication technology sector (\$1.8 billion).

\$1.6 billion in output (i.e., total sales of culture goods and services)

The total output of culture goods and services was \$1.6 billion in Saskatchewan in 2020. Total output, which essentially equates to the total value of all culture goods and services sold (including an estimate for free items), provides a useful measure of overall economic activity from artists and cultural organizations.

This statistic includes, for example, books and e-books, architectural and design services, broadcasting, works of art, as well as admissions to museums, performing arts events, and movie theatres. It includes an imputed value (at cost) for culture goods and services that are offered for free.

Compared with GDP, this statistic contains significant multiple counting. Take, for example, a musician who is paid to perform at a cultural festival that takes place in a municipally run cultural centre. Say that the cultural centre collects a \$25 admissions fee. This admissions fee is counted many times in the total value of culture goods and services sold. The admissions fee itself is counted as revenue for the cultural centre. The portion of the fee that goes to the festival is also counted in the festival's revenues (also a cultural service). The portion that goes to the musician from the festival is counted in the musician's revenues (another cultural service). The expenses on other culture goods and services by the cultural centre, the festival, and their suppliers (e.g., printing, musical instruments) are also counted multiple times. The GDP estimate is a de-duplicated, value-added indicator (but is based on total output).

Statistics Canada offers [a description of production and output](#), including the calculation for free items.

Key contributors to culture GDP

Four sectors (called "domains" by Statistics Canada) contributed at least 10% of the total GDP of culture products in Saskatchewan in 2020:

- Governance, funding, and professional support: \$294 million (33%). This includes, among other items, the GDP of all government-owned cultural venues (which are therefore not counted in other areas, e.g., performing arts centres, art galleries, heritage venues, and many more).
- Audiovisual and interactive media: \$222 million (25%)

- Visual and applied arts: \$140 million (16%)
- Written and published works: \$96 million (11%)

The GDP impact of other domains was as follows:

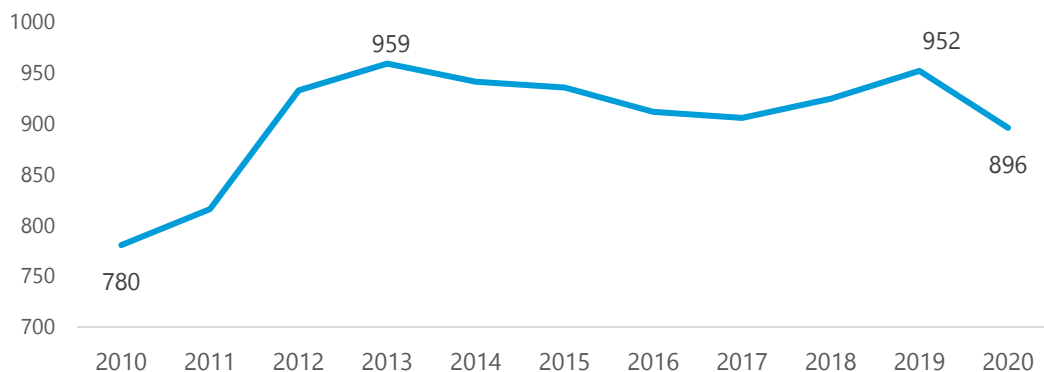
- Education and training: \$85 million (9%)
- Live performance: \$37 million (4%)
- Heritage and libraries: \$9 million (1%)
- Multi domain: \$8 million (1%)
- Sound recording: \$3 million (0.4%)

Changes in GDP

Note: None of the statistics in this section have been adjusted for the 19% inflation in Saskatchewan between 2010 and 2020.

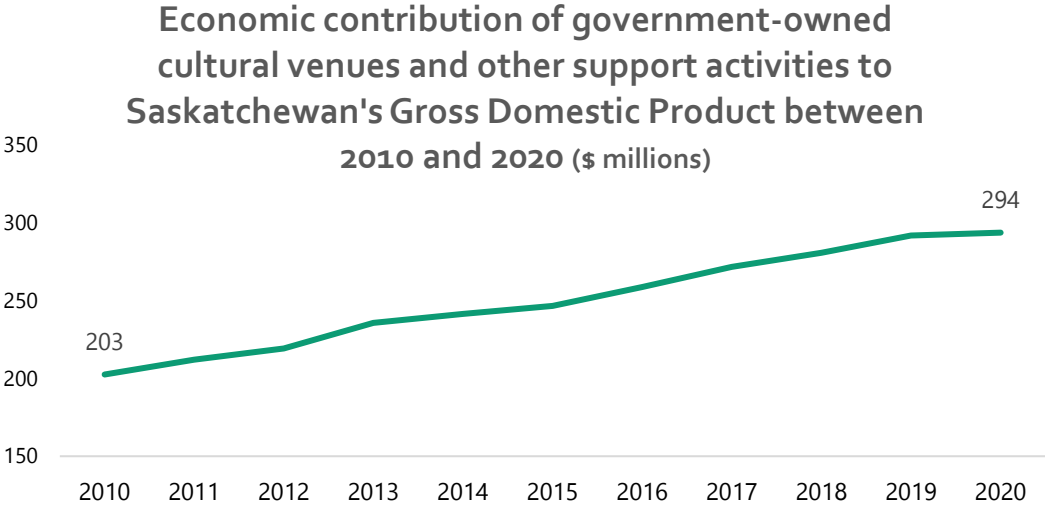
In 2020, the GDP of culture in Saskatchewan was at its lowest level since 2013. As shown in the following chart, GDP of culture peaked in 2013 and had almost returned to that level in 2019, the year before the start of the pandemic. In 2020, the GDP of culture in Saskatchewan was reduced by 6%.

**Economic contribution of culture to Saskatchewan's
Gross Domestic Product between 2010 and 2020**
(\$ millions)



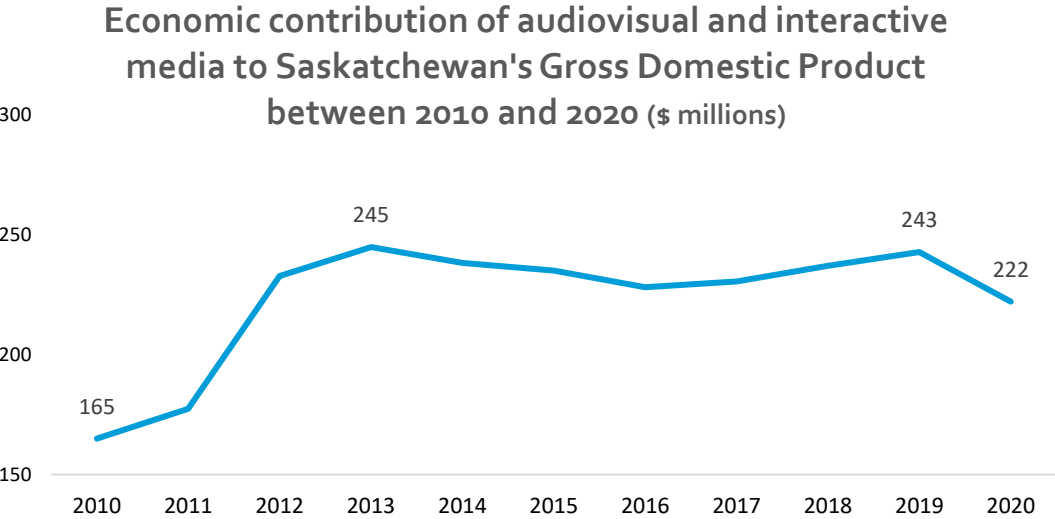
Source: Statistics Canada, Table 36-10-0452-01: Culture and sport indicators by domain and sub-domain, by province and territory, product perspective.

The largest contributor to culture GDP in Saskatchewan – government-owned cultural venues, plus funding and professional support – saw steady GDP growth between 2010 and 2020.



Source: Statistics Canada, Table 36-10-0452-01: Culture and sport indicators by domain and sub-domain, by province and territory, product perspective.

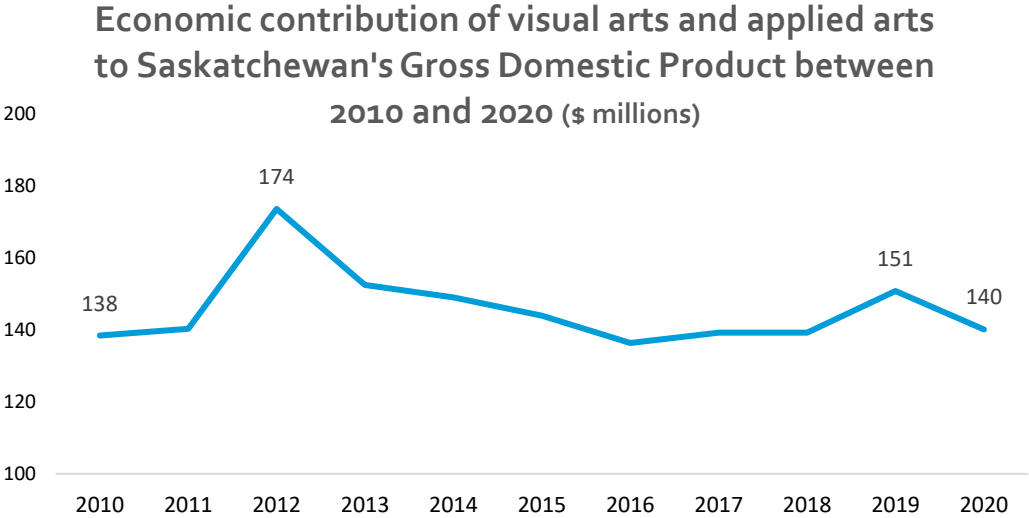
Like the overall impact of culture on GDP, the second-largest contributor to culture GDP in Saskatchewan – audiovisual and interactive media – peaked in 2013 and had almost returned to that level in 2019, the year before the start of the pandemic. This domain includes broadcasting, interactive media, as well as film and video.



Source: Statistics Canada, Table 36-10-0452-01: Culture and sport indicators by domain and sub-domain, by province and territory, product perspective.

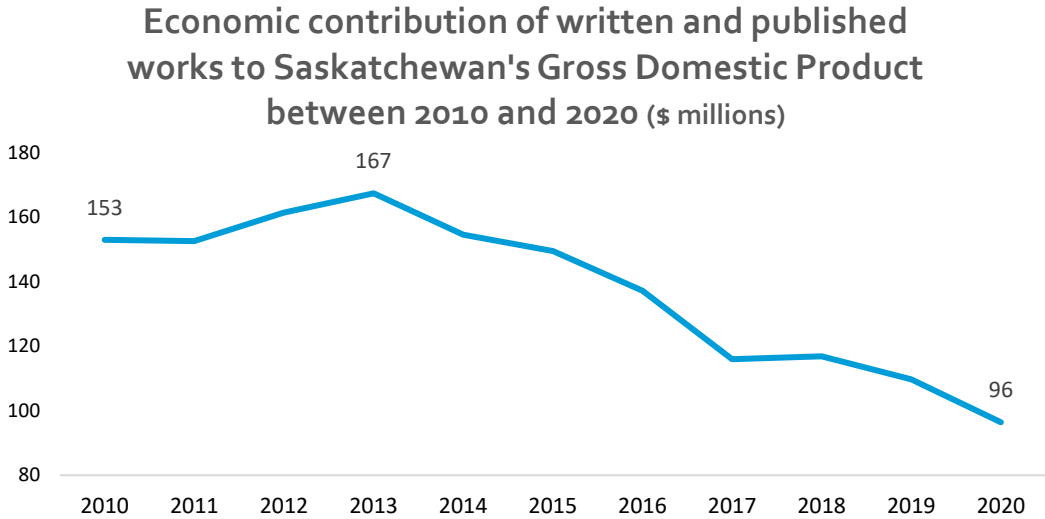
The audiovisual measurement, specifically the film and video component, has changed somewhat over time, rendering it less consistent and comparable than other domains. Statistics Canada notes that film and video (which accounted for 7% of the audiovisual and interactive media domain in Saskatchewan in 2020) underwent major changes in its estimates starting in 2015. Statistics Canada advises not to compare estimates from 2015 and later to prior periods. However, given its relatively small proportion of the audiovisual and interactive media domain, the above trend graph should be reasonably accurate.

As shown in the next graph, visual and applied arts – the third-largest contributor to culture GDP in Saskatchewan – peaked in 2012 and has remained at a fairly consistent (but much lower) level since then. In descending order of GDP impact, this domain includes crafts, architecture, advertising, design, and works of art.



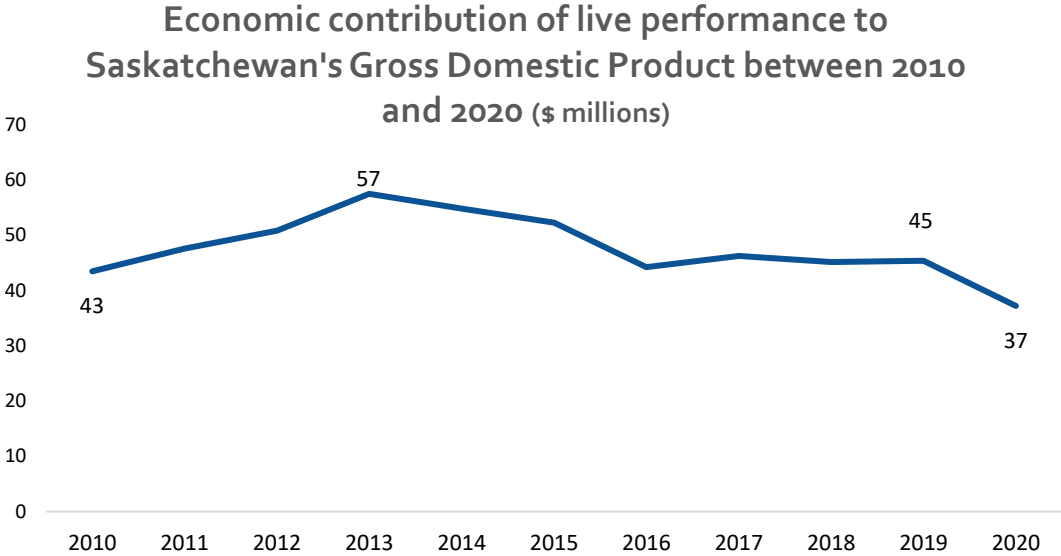
Source: Statistics Canada, Table 36-10-0452-01: Culture and sport indicators by domain and sub-domain, by province and territory, product perspective.

Consistent with national publishing trends, the economic impact of written and published works in Saskatchewan has decreased steadily since its peak in 2013.



Source: Statistics Canada, Table 36-10-0452-01: Culture and sport indicators by domain and sub-domain, by province and territory, product perspective.

While not one of the largest domains, live performance was very strongly affected by the start of the pandemic in 2020, as shown in the following graph. The GDP of live performance in 2020 was at its lowest level in the available data (i.e., back to 2010).



Source: Statistics Canada, Table 36-10-0452-01: Culture and sport indicators by domain and sub-domain, by province and territory, product perspective.

Personal and societal benefits

Public perceptions in Saskatchewan, based on a national survey

This section explores recent data about the Saskatchewan public's perceptions of the personal and societal benefits of the arts and culture, based on a national survey conducted in February and March of 2021. The survey, sponsored by the Department of Canadian Heritage and the Canada Council for the Arts, was conducted by Environics Research Group.

The survey was particularly large, with an overall sample size of 10,000 Canadians 16 and older who reside in the 10 provinces, including 308 Saskatchewanians. The Saskatchewan sample size does not lend itself to demographic breakdowns.

Because the sample was drawn from an opt-in panel, a margin of error was not reported for the statistics.

Strong consensus that the arts help bring people together and make communities better

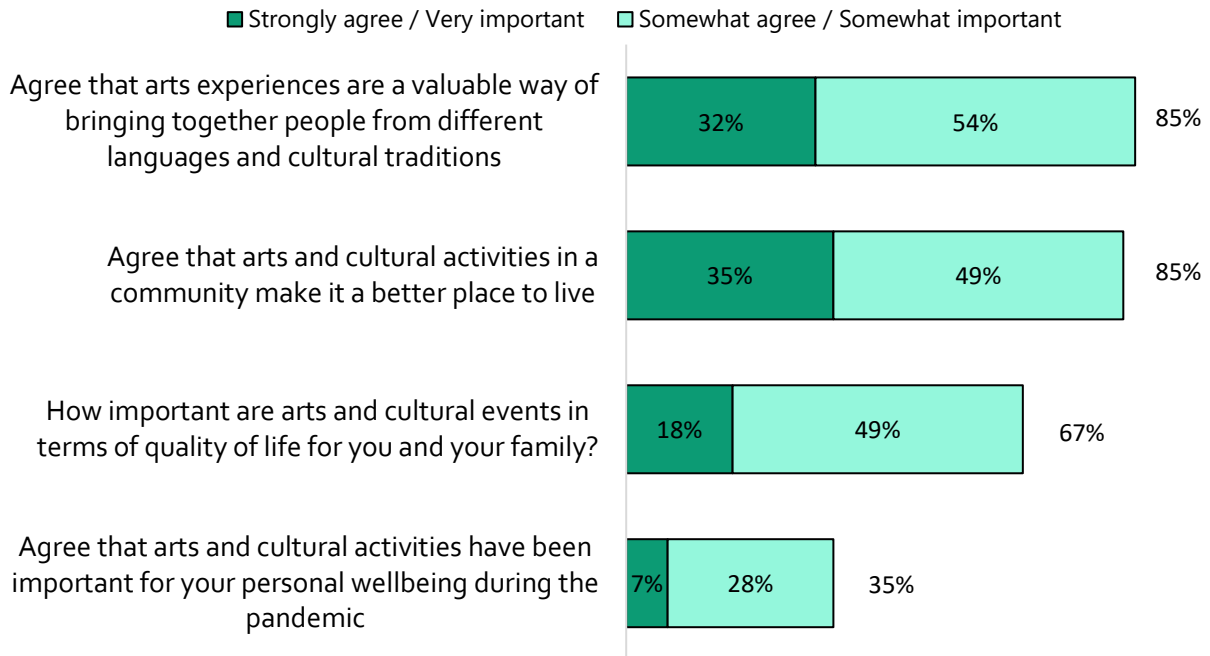
An analysis of the data from this survey shows that there is strong consensus among Saskatchewanians that the arts and culture bring people from different backgrounds together and make their communities better places to live, as visualized in the chart below:

- 85% of Saskatchewan respondents agree that "arts experiences are a valuable way of bringing together people from different languages and cultural traditions" (32% strongly agree and 54% somewhat agree; the breakdown does not add to the total because both sets of statistics were rounded).
- 85% agree that "arts and cultural activities in a community make it a better place to live" (35% strongly agree and 49% somewhat agree; the breakdown does not add to the total because both sets of statistics were rounded).

Two-thirds of Saskatchewanians (67%) believe that arts and cultural events are important in terms of quality of life for them and their family (18% said strongly important and 49% somewhat important).

However, only about one-third of respondents (35%) agree that "arts and cultural activities have been important for your personal wellbeing during the pandemic" (7% strongly agree and 28% somewhat agree).

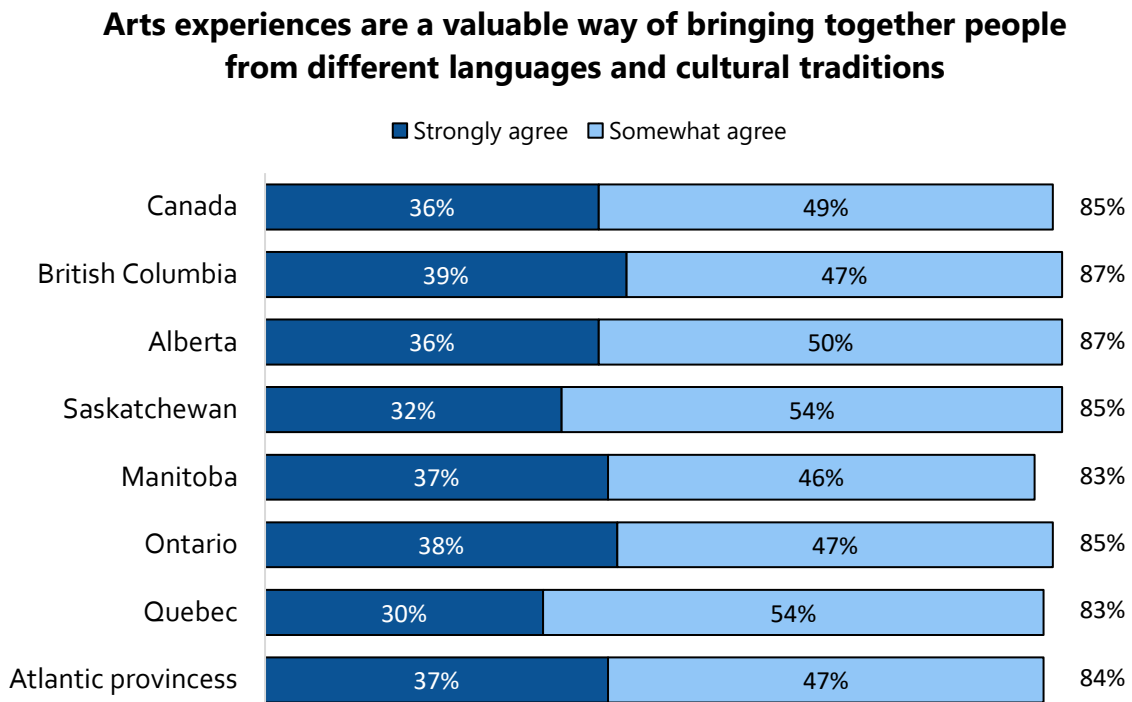
Perceived benefits of the arts and culture in Saskatchewan



Source: Arts and Heritage Access and Availability Survey 2020-2021, Environics Research Group for the Department of Canadian Heritage and Canada Council for the Arts

Provincial comparisons

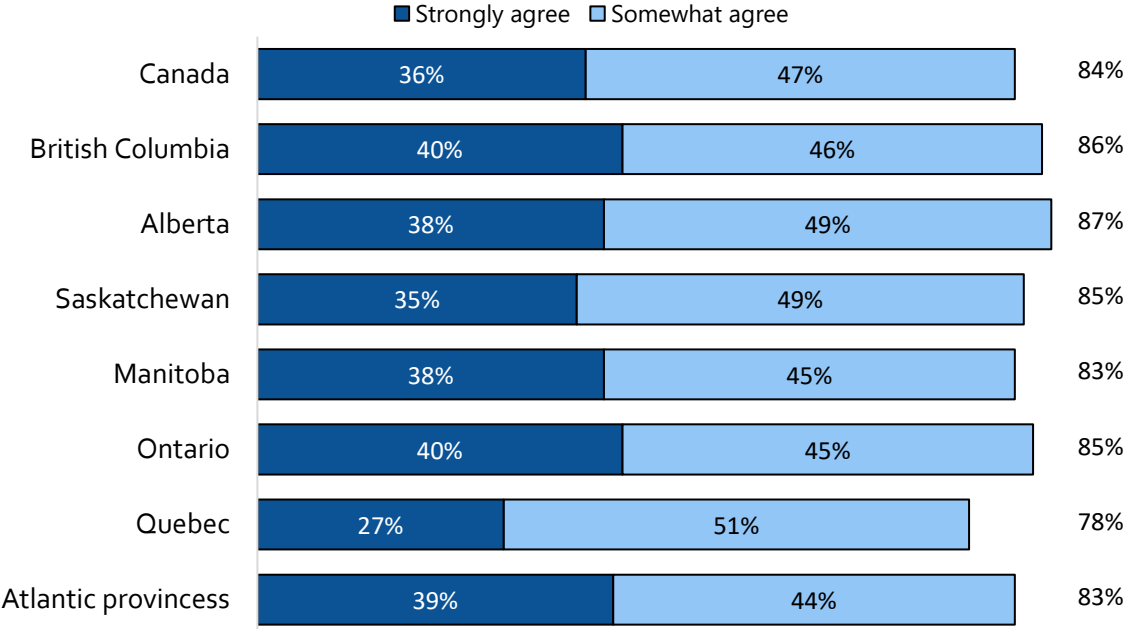
There are relatively few differences between the provinces in terms of the percentage of residents who agree that arts experiences are a valuable way of bringing together people from different languages and cultural traditions, as shown in the following chart. The Saskatchewan percentage is equal to the national average (both 85%).



Source: Arts and Heritage Access and Availability Survey 2020-2021, Environics Research Group for the Department of Canadian Heritage and Canada Council for the Arts

Across the provinces, there is a strong consensus that arts and cultural activities make communities better places to live. As shown in this chart, Saskatchewan residents are very close to the national average (85% vs 84%).

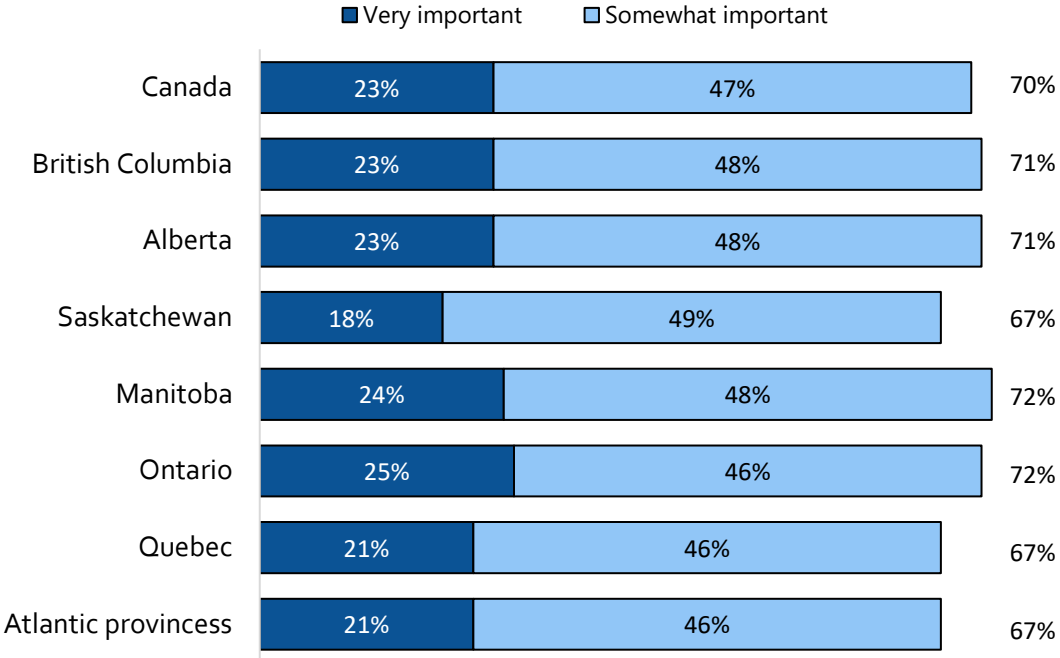
Arts and cultural activities in a community make it a better place to live



Source: Arts and Heritage Access and Availability Survey 2020-2021, Environics Research Group for the Department of Canadian Heritage and Canada Council for the Arts

The percentage of Saskatchewanians who believe that arts and cultural events are important to their quality of life (67%) is slightly below the national average (70%), with the largest difference among those who believe that events are very important. While a margin of error was not provided in the dataset, these differences would probably not be statistically significant.

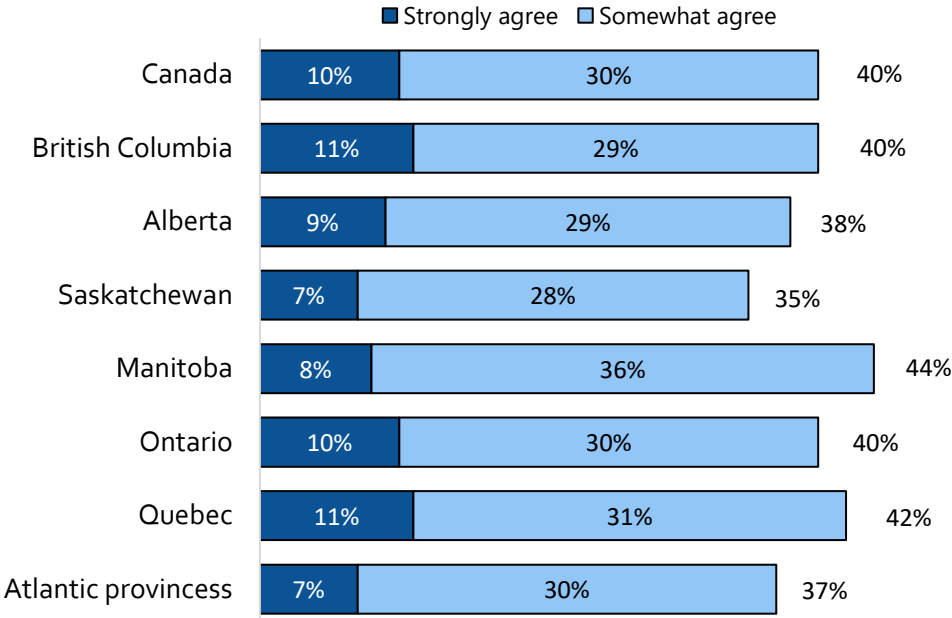
Arts and cultural events are important for the quality of life of respondents and their families



Source: Arts and Heritage Access and Availability Survey 2020-2021, Environics Research Group for the Department of Canadian Heritage and Canada Council for the Arts

There is a slightly larger difference between the percentage of Saskatchewanians and all Canadians who believe that arts and cultural activities have been important for their personal wellbeing during the pandemic. Both percentages are relatively low: 35% in Saskatchewan vs the national average of 40%.

Arts and cultural activities have been important for personal wellbeing during the pandemic



Source: Arts and Heritage Access and Availability Survey 2020-2021, Environics Research Group for the Department of Canadian Heritage and Canada Council for the Arts

Do more Saskatchewan residents agree or disagree with the benefits of the arts and culture?

The following graph shows “net positives”, which is the percentage who agree with a statement (either strongly or somewhat) minus those who do not agree (either not at all or not very much). For the “importance” question, the graph shows those who say that arts and cultural events are important (either very or somewhat) minus those who say that events are not important (either not at all or not very). Because some people responded “not sure”, those who agree and those who disagree do not add up to 100%.

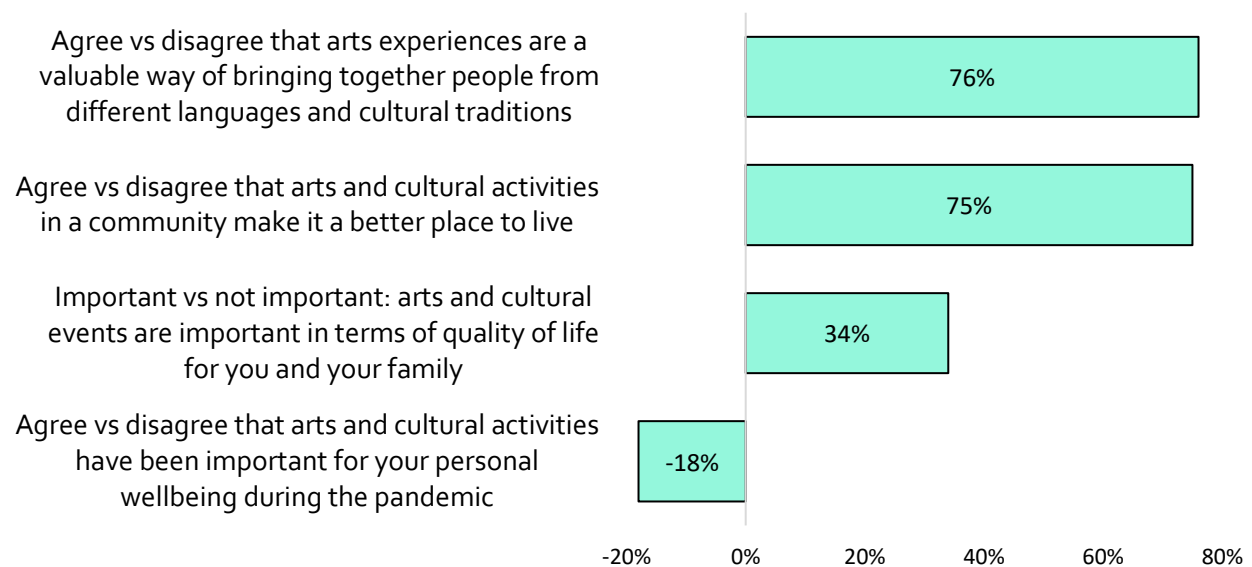
One conclusion remains clear from this analysis: there is a strong consensus among Saskatchewanians that the arts and culture bring people from different backgrounds together and make their communities better places to live:

- Regarding arts experiences being a valuable way of bringing together people from different languages and cultural traditions, 85% agree and only 9% disagree, for a difference of 76% of Saskatchewanians.
- Similarly, 85% agree and only 10% disagree that arts and cultural activities make Saskatchewan communities better places to live, for a difference of 75% of the province's residents.

The difference is much smaller regarding arts and cultural events being important for the quality of life for respondents and their families. The "net positive" is 34%, with 67% indicating that arts and cultural events are important to them and 33% saying that they are not. (For this question, an unsure option was not offered.)

Finally, more Saskatchewanians disagree than agree with the importance of arts and cultural activities for their personal wellbeing during the pandemic (53% vs. 35%), resulting in a difference of -18%. This is a disappointing finding at a time when many people have struggled with significant wellbeing challenges.

Net positives: perceived benefits of the arts and culture



Source: Arts and Heritage Access and Availability Survey 2020-2021, Environics Research Group for the Department of Canadian Heritage and Canada Council for the Arts

The next graph shows “net very positives”, which are the differences between the strongest positive and negative responses (i.e., those who strongly agree minus those who do not agree at all or those who say that events are very important minus those who say not at all important).

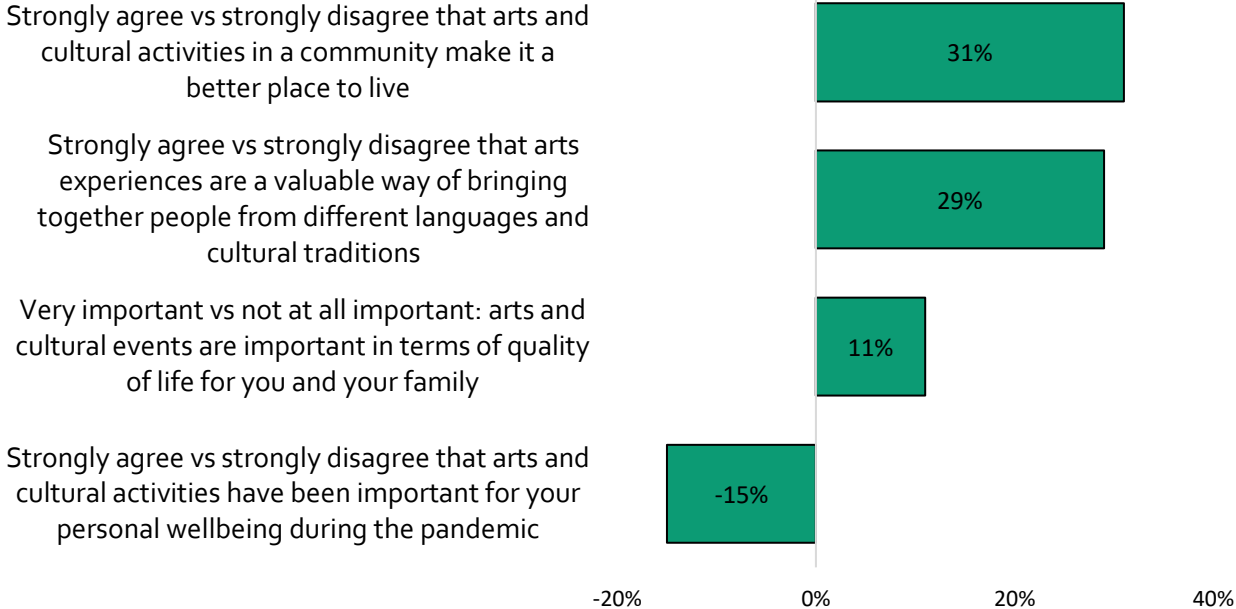
Once again, there is very strong agreement that the arts and culture bring people from different backgrounds together and make their communities better places to live. These differences are shown in the first two bars in the graph:

- Regarding arts and cultural activities making Saskatchewan communities better places to live, 35% strongly agree and only 4% strongly disagree, for a difference of 31%.
- 32% strongly agree and only 3% strongly disagree that arts experiences are a valuable way of bringing together people from different languages and cultural traditions, for a difference of 29% of Saskatchewan residents.

Regarding arts and cultural events being important for the quality of life for respondents and their families, 18% said that such events are very important and 7% said that they are not at all important, for a difference of 11% of Saskatchewanians.

The final bar in the graph shows that more people strongly disagree (22%) than strongly agree (7%) with the importance of arts and cultural activities for their personal wellbeing during the pandemic, resulting in a difference of -15%.

Net very positives: perceived benefits of the arts and culture



Source: Arts and Heritage Access and Availability Survey 2020-2021, Environics Research Group for the Department of Canadian Heritage and Canada Council for the Arts

Survey questions

- How important to you are the types of arts and cultural events we've talked about in terms of quality of life for you and your family?
(Very important / Somewhat important / Not very important / Not at all important)
(Note: In the question, the "arts and cultural events we've talked about" relate to activities before or during the pandemic, including performing arts, visual arts, Indigenous arts, cultural festivals, museums, science centres, historic sites, archives, zoos, aquariums, and botanical gardens.)
- Please indicate your level of agreement with the following statements.
(Strongly agree / Somewhat agree / Somewhat disagree / Strongly disagree / Not sure)
 - Arts and cultural activities in a community make it a better place to live.
 - Arts experiences are a valuable way of bringing together people from different languages and cultural traditions.
 - During the COVID-19 pandemic, arts and cultural activities have been important for my personal wellbeing.

Public perceptions in Saskatchewan, based on a Saskatchewan-specific survey

An April 2020 survey of Saskatchewan residents probed their perceptions of the benefits and impacts of the arts and culture in the province. The survey, sponsored by SK Arts and SaskCulture, was conducted by Insightrix Research Inc. The survey was completed by 1,407 Saskatchewanians 18 years of age or older (a much larger Saskatchewan sample than the national survey summarized above). The margin of error was reported as plus or minus 3 percentage points, at a 95% confidence level.

Similar to the national survey, a key finding of the Saskatchewan-specific survey is that the vast majority of residents recognize many benefits of the arts and culture. The most common are:

- Bringing the community together (with which 83% of respondents agreed)
- Providing great entertainment options (82%)
- Offering educational information for families and children (81%)
- Promoting a diverse range of activities (81%)
- Improving the quality of life (79%)
- Boosting the local economy (75%)
- Making me feel proud to live in Saskatchewan (74%)
- Promoting healthy living (72%).

There is a strong consensus about these benefits across demographic groups.

The top emotions associated with culture and the arts in Saskatchewan are related to their impacts on individuals. About one-third or more of residents indicated that they feel inspired (32%), appreciative (34%), and proud (36%). One-quarter of residents said that they associate

culture and the arts in Saskatchewan with feeling happy (26%) and connected (24%). However, one-quarter (24%) believe that the arts and culture are overlooked in the province.

The report for this project notes that, during the pandemic, some residents “care less about arts and culture because they are concerned with other life issues, while others find the topic more indispensable for its value in mental health and human life”.

Respondents were asked to rate the importance of the arts and culture to people living in Saskatchewan, using a scale from 1 to 10. The average rating was 6.8 for all respondents, but this varied by demographic group. The report notes that: “Arts and culture is significantly more important to Indigenous persons than non-Indigenous, and more to females than males. Residents in Southern Saskatchewan attach lower importance to arts and culture relative to people from other areas. There is no difference in perceived importance identified by age groups, income levels, or by newcomers versus non-newcomers.”

Other recent research into personal and societal benefits

A major research project commissioned by the Creative City Network of Canada featured [stories from 29 artists and organizations](#) who have tried new things during the pandemic, resulting in significant artistic and social contributions. The educational benefits of the arts are highlighted in a story about how the [Saskatoon-based Strata Festival pivoted incredibly quickly](#) to offer its Student Composer Symposium in an online format. The online format allowed for in-depth interaction between students and teaching composers, which may have achieved greater educational benefits than an in-person masterclass would have. As Artistic Director Paul Suchan stated, “It’s more time that [the students] get to write a new piece under guidance, from a guest composer. They have lots of chances to interact. It was four or five sessions, whereas a masterclass is just one session, maybe 10-15 minutes with your piece.”

The Saskatchewan Arts Alliance (SAA) has studied many elements of the personal and societal benefits of the arts. Research published or in progress from the SAA include:

- A summary of survey data on [The Value of Arts for Social Cohesion in Saskatchewan](#)
- A review of research related to [The Value of Arts Education to Student Learning and Development](#)
- [The Community Impact of Weyburn’s Spark Centre](#)
- [The Role of the Arts and Culture in Northern Saskatchewan Communities](#)
- [Studio without Walls](#)
- [Mapping the Embeddedness of Arts and Cultural Engagement across Saskatchewan](#)

National studies of note

While provincial data are not available from a survey commissioned by Business/Arts and the National Arts Centre, on a national scale, Canadians who have continued to participate in arts

and culture activities during the pandemic have perceived benefits such as learning and experiencing new things, improving their mental health, having fun, and feeling connected to other people. (See slide 23 in the [pdf summary of the February 2022 Arts Response Tracking Study](#).)

A 2021 Hill Strategies [report in the *Statistical Insights on the Arts* series](#) looked at the connection between arts participation, health, and wellbeing. Among the key findings:

- There is a strong connection between cultural participation and health.
- There is solid evidence of a connection between cultural participation and mental health.

A 2017 [literature review by Sharon Jeannotte](#) provides an overview of frameworks and methodologies used to study the social impacts of culture, as well as major themes, theories, evidence, and critiques presented in the literature from 2000-2017. As Jeannotte notes, there are many research projects on the social effects of culture, but they are of varying degrees of quality.

An older literature review by Hill Strategies ([*Making a Holistic Case for the Arts*](#), published in 2014) examined the findings of 46 Canadian research reports that addressed outcomes of the arts related to quality of life, wellbeing, health, society, education, and the economy.