Greetings,

Following up on our discussion yesterday, these are what I think are the salient points. Please feel free to respond and add comments or note anything you may think I missed.

It has been identified that the most recent Stat Can Canadian Cultural Satellite Account (CSA) reports based on 2010 to 2018 and 2014 to 2018 trends are showing a significant decline in the GDP of culture in Manitoba over those periods. This is concerning especially when other jurisdictions – BC, Yukon, Ontario and Quebec are showing large increases in GDP in their respective territories. Manitoba is ranked 10th overall in terms of GDP growth with a net decline of -3% compared to increases of 16 to 18% in the provinces noted for growth.

It was noted that Saskatchewan has seen similar declines to Manitoba and Alberta (not as bad as MB and SK) has also had poor performance relative to the areas showing significant growth. The questions are really – is this decline a result of flat and / or decreased provincial funding or is there some kind of regional “prairie factor” – as we know that creative activity is typically higher in larger centres with greater population density. Regardless, this raises significant concern and we will need to do further work to better understand the causes and implications of the noted declines.

Areas for further research:

* Compare GDP growth using the Creative Industries framework over the same periods – removing IT and software to have a better comparison – this can demonstrate if similar trends emerge using an alternative creative framework to the CSA.
  + For this we need to somehow separate arts and performing industries from sport. So far, I’ve started using the business count data to try see trends in business growth.
* Can we analyze jobs over the same period of time and see if there are complimentary trends in job growth vs GDP growth
  + Sent in an excel
* How does the recent decline in Manitoba contrast to the 1997 – 2017 - 20 year, 14% growth rate as identified by the Freeman Miles Sparling 2018 analysis.
  + TBD
* Can we examine growth or decline by sub-sector in a meaningful way? Is there a place for local (industry association) research to augment the Stat Can data?
  + Business counts are probably the most meaningful way to measure growth/decline by subsector – sent to Alan!. I also think that arts and culture has been heavily integrated world-wide through technology and youtube etc.
* Can we determine funding trends in the provinces and territories and compare to see if there is any correlation between growth / decline and provincial investment.
* Can we further investigate levels of federal funding allocated to each province or territory and determine if there is a correlation between provincial funding levels and subsequent federal levels.
  + FOUND!!! And sent! Getting update from Statistics Canada
* Are there metrics we can identify that would clearly note that the decline in GDP  and / or jobs has nothing to do with a lack of excellence. Are Manitoba artists and organizations performing at or above a national standard of excellence?
  + Let’s discuss

If these trends of recent decline in GDP as noted above are confirmed, this would indicate that Manitoba’s arts sector was vulnerable prior to COVID. It would also indicate that the combined impacts of COVID and a negative growth pattern could conceivably lead to a shrinking of the sector – the question then becomes how do we safeguard what is important and how would we determine what is important enough to warrant saving.

A further question is how can we build the sector back to be better than it was prior to the pandemic? And how do we determine what size investments would be needed to stabilize the sector, and which areas or subsectors would yield the best return on investment. Further yet, how can we identify areas of the arts sector that are important to maintain and grow, but that may not provide an ROI that can be measured in dollars?

I welcome thoughts, comments, additions and rebuttals to any of the foregoing.

Thanks,

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https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3710006801