CONSEIL DES ARTS DU MANITOBA
MANITOBA ARTS COUNCIL

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HOW COVID-19 IS AFFECTING ARTS AND CULTURE IN MANITOBA

MANITOBA ARTS COUNCIL

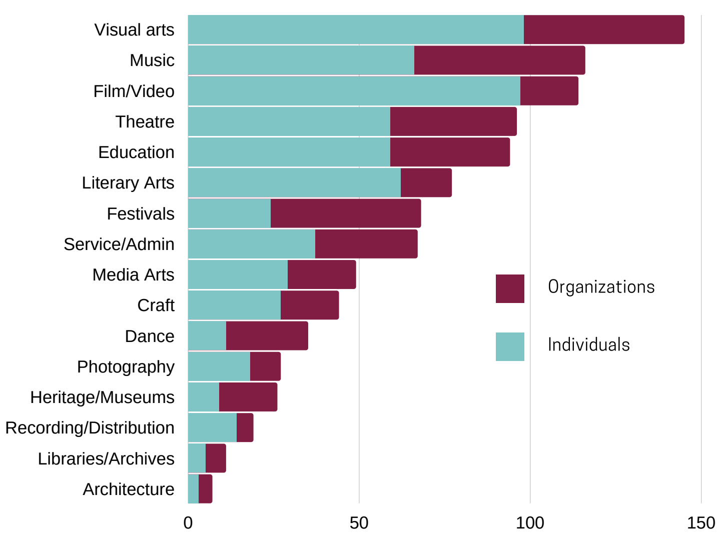
FACT SHEET: COVID-19 IMPACT ON ARTS & CULTURE IN MANITOBA

June 2020

According to Statistics Canada, the arts and cultural sector in our province is a 1.6 billion dollar industry that represents 2.4% of Manitoba's economy (GDP) and employs more than 20,000 people.

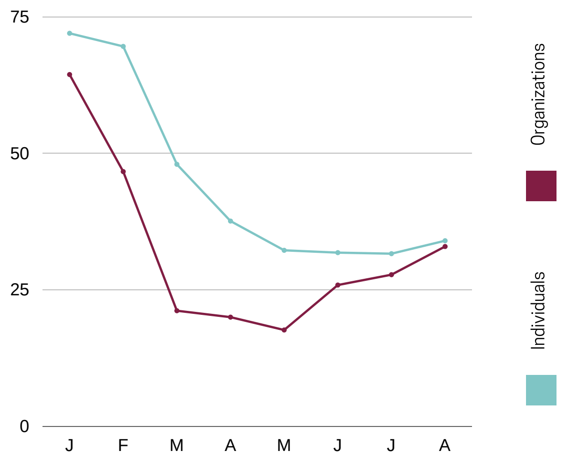
To better understand how the pandemic has impacted Manitoba's arts and culture sector, the Manitoba Arts Council organized a survey. Between May 13 and May 24, 485 people responded (70% individuals, 30% organizations).
Respondents are primarily from Winnipeg (82% of individuals, 65% of the organizations).

The survey captures responses from across the artistic and cultural sector in the following areas of practice:



2020 INCOME

Survey responses show a sharp decline in income as of March, and respondents expect to earn less than half of their normal income for the rest of 2020.



ORGANIZATIONS

For organizations working in arts and culture in Manitoba, how has the pandemic affected ...

	JAN - APR	MAY- AUG
REVENUE	-48%	-73%
PAYROLL	-21%	-51%
PROFESSIONAL FEES	-40%	-75%

>90% of all organizations expect to lose revenue in 2020.

2 in 3 organizations have lost investments in artistic and cultural projects (average: $ 33, 000).

50% of all organizations are not eligible for the Canada Emergency Wage Subsidy.

INDIVIDUALS

48% of January-April income lost already.

69% of May-August income is expected to be lost.

The Canada Emergency Response Benefit is reaching 35% of respondents. Those incomes are most affected by the COVID-19 outbreak, though the respondents not receiving this benefit are also reporting significant loss of income.

35% of individual respondents indicate that they are ineligible to receive this benefit.

How do arts and cultural workers make a living?

56% of their income comes from gigs, contracts, and sales.

75% indicate their income varies greatly over the course of the year.

65% of their income is concentrated during the March-September period.

These factors worsen the financial impact of COVID-19 on people working in arts and culture.

Foreword

People connecting with people is at the very heart of the arts/culture sector. When the COVID-19 pandemic arrived in Manitoba in March 2020, it disrupted the simplest and most important way in which we connect – being together.

This led to a profound upheaval for the arts/culture sector, affecting every facet of creation, production, and presentation. While we recognize that this has exacted a heavy toll on the emotional wellbeing of the people who work in arts and culture, this report focuses on a distinct and central component of the upheaval – the financial cost for individuals and organizations.

One does not begin down the path that leads to a career in arts and culture for the financial rewards, yet the sector is an economic powerhouse. In Manitoba alone, more than 22,000 people work in the sector and it contributes more than $1.6 billion to our economy. That is not counting the substantial secondary impact on tourism, accommodation, restaurants, and so on.

The results of the survey deployed by MAC in May 2020 are bleak. Individuals working in the sector – who, for the most part, already earn less than the average Manitoban – lost 48% of their income during the first four months of 2020. For the May-August period, they expected to lose even more (69% of their income).

Organizations, the foundation of our arts/culture eco-system, endured income reductions of 48% between January and April and expected to see a 73% reduction in income between May and August. This led to significant lay-offs and reduced opportunities for contract workers.

Understanding the scope and scale of the losses for arts/cultural workers, and the organizations that employ them, informs the discussion about recovery. How do we ensure that the 22,000 people who worked in arts and culture in Manitoba pre-pandemic have jobs to return to? Who will tell our stories, attract our visitors, and fill our restaurants, now and into the future?

What does this future look like? This is of course unanswerable but arguably the best approach we can take to prepare for an unknowable future is to focus on resilience. Our diverse, rich, and vibrant arts/culture sector is more important now than ever to show us the way through these uncharted waters. Let's provide our artists, designers, technicians, administrators, and organizations with what they need to recover, reinvent, and re-emerge.

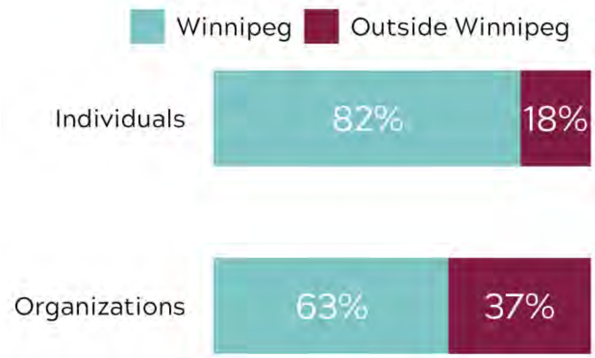
Randy Joynt
Executive Director
Manitoba Arts Council

Introduction

The arrival of the COVID-19 pandemic in Manitoba and the public health measures put in place to curb the spread of the virus instantly disrupted activity in the arts/culture sector. As organizations and individuals active in the sector adjusted to new conditions, it became obvious that the impact would be profound, but exact data was not available. To guide decision-making at the Manitoba Arts Council (MAC) as we look towards recovery, a large-scale survey was fielded in May 2020. The focus of the MAC survey was the financial impact of the COVID-19 pandemic on the arts/culture sector.

This report presents the key findings of the survey, detailing the impact of the pandemic on individuals in the arts/cultural workforce and on organizations active in the sector. The concluding section places the findings in the broader context of the Manitoba economy, discusses developments since the survey was conducted, and reviews prospects for recovery.

Figure 1: Responses by region

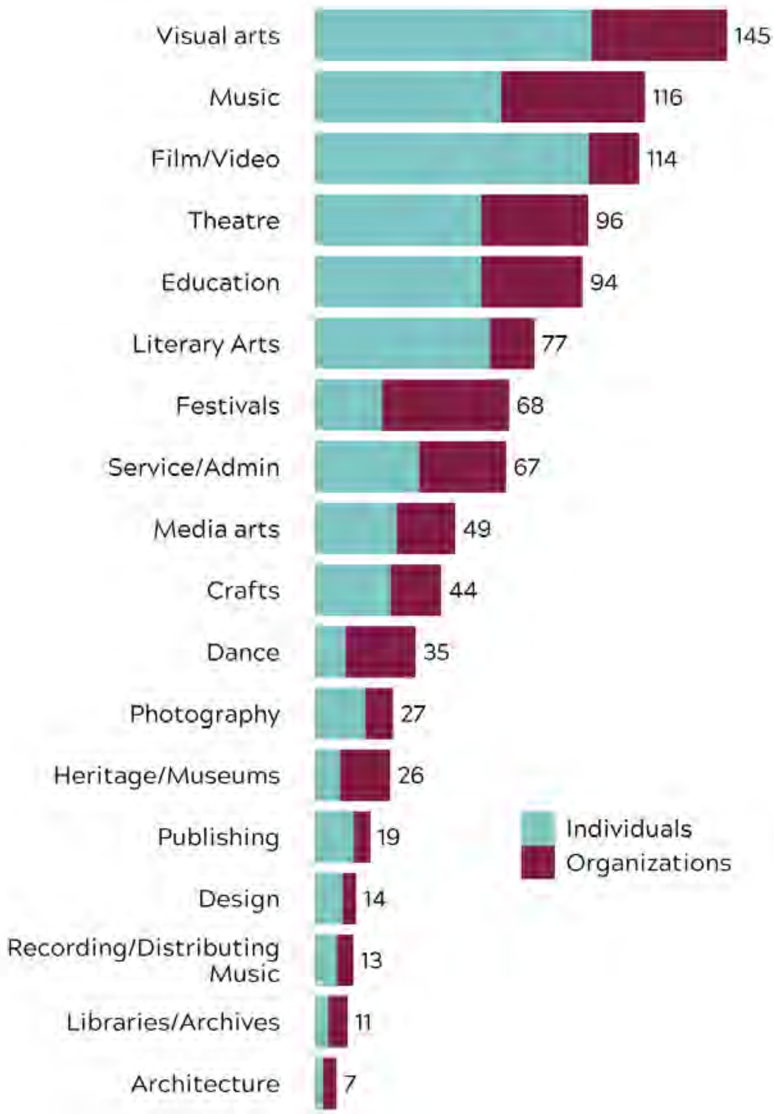


Survey responses were collected from May 13 to May 24, 2020. A total of 485 responses were received. The survey was available in both English and French, and 20 participants submitted their response in French. Of the 485 respondents, 70% are individuals working in the arts/culture sector, and 30% were responses submitted on behalf of an organization. Respondents are primarily from Winnipeg (82% of individuals, 63% of the organizations).

The breadth and diversity of the sector is reflected in the areas of practice selected by the respondents. As figure 2 indicates, the survey captures responses from individuals and organizations active in as many as 18 different disciplines and areas, with visual arts (30%), music (24%), and film/video (24%) being the most common. In addition, responses were submitted by respondents working in areas ranging from education and heritage, to museums, libraries, and archives.[1]

[1] Note: respondents could select multiple areas of practice. The survey follows the definition of the sector developed by Statistics Canada for the Cultural Satellite Account (CSA). For more details on the CSA and on the survey methodology, consult the appendix at the end of this report.

Figure 2: Responses by area of practice



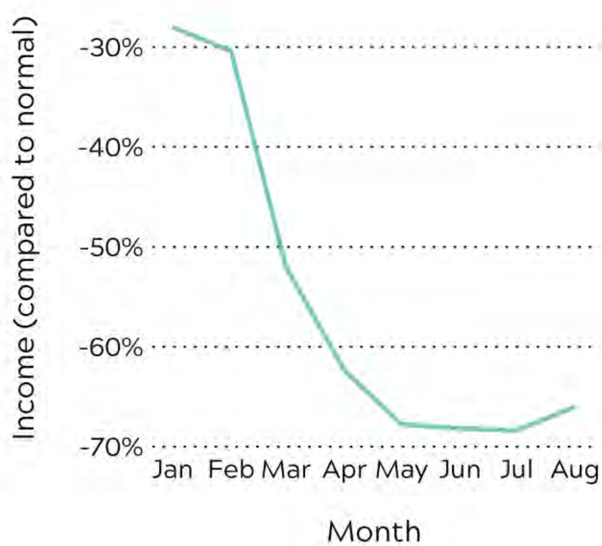
Impact on individuals working in the arts/culture sector

Over the first four months of 2020, individuals in the arts/culture workforce lost nearly half of their normal income (48%). For the period between May and August, survey respondents expected to lose an additional two thirds of their income (69%). The amount lost due to COVID-19 typically lies around $500 per month in the first four-month period, climbing to $1,000/month expected for the May-August period (these are median values, the average lost income is higher as a result of outliers).

Figure 3 shows a steep decline in income as of February 2020, with reported losses of 50-60% in March and April. Respondents expected to receive about one-third of their typical income for the entire May-August 2020 period.[2]

Median income (before taxes) for the survey sample is just over $2,000/month, with around 45% of respondents reporting monthly incomes at or below $2,000, another 15% indicating incomes between $2,000 and $3,000 monthly, and about 40% of respondents claiming an income above $3,000/month. Due to a number of outliers towards the higher end of the income range, average income in the sample is closer to $3,500. For Manitobans in general, median monthly income is just over $2,900 with the average estimated at $3,700/month.[3]

Figure 3: Lost income (January – August 2020, individual respondents)



[2] Survey respondents indicated lost income as of the beginning of January 2020, prior to the arrival of the pandemic in Manitoba. This finding may be due to a variety of factors including bookkeeping rules that affect when income is recorded as well as measurement error.

[3] Statistics Canada (2018) 'Table 11-10-0238-01 (Distribution of market, total and after-tax income of individuals, Canada, provinces and selected census metropolitan areas)', *Canadian Income Survey 2018*, available at https://doi.org/10.25318/1110023801-eng (as accessed on September 10, 2020).

Figure 4: Income distribution in the survey sample and amongst Manitobans

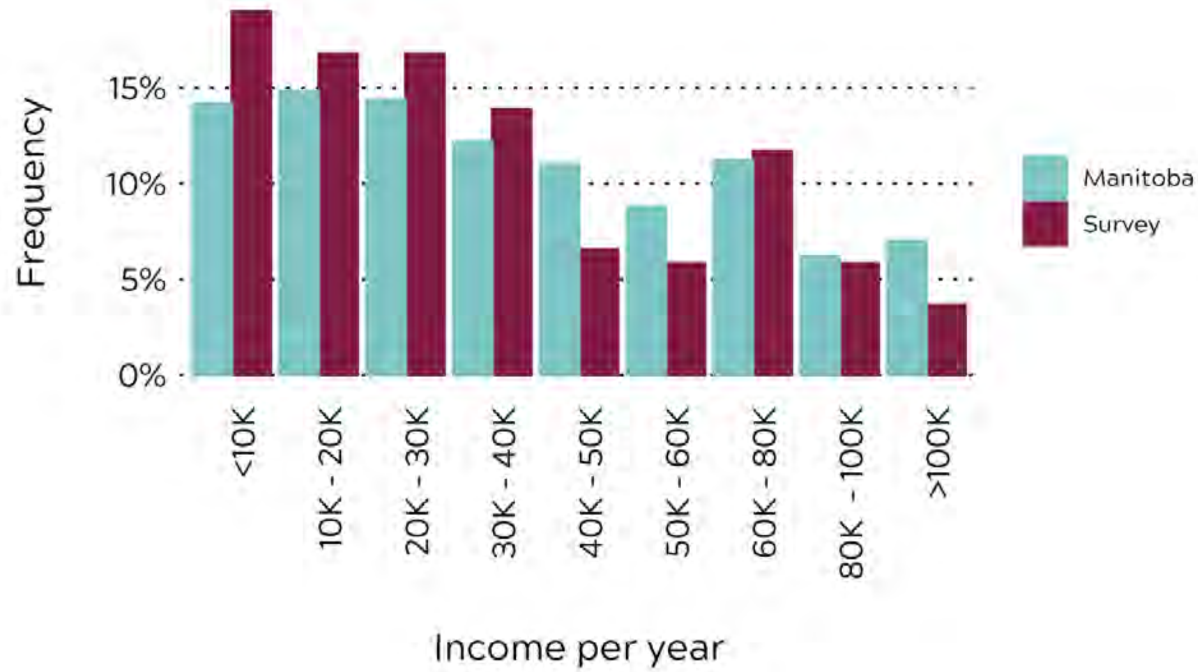


Figure 4 shows that, compared to Manitobans ages 16 and up, arts/culture workers are overrepresented in all income brackets below $40,000, whereas they are less likely to find themselves in brackets above $40,000. Of the respondents in the sample, 66% make less than $40,000 per year, compared to 56% of all Manitobans.

Almost all respondents will see their income for 2020 affected to some extent (less than 10% of respondents expect to lose no income at all throughout 2020). As of the end of April 2020, 83% of the individual respondents in the survey indicated that they had already lost some income. For the May-August period, more than half of all respondents (57%) expect to lose virtually all of their income; only 7% of respondents expect to lose less than 20% of their income during this period.

Figure 5: Degrees of income loss (individuals, two four-month periods in 2020)

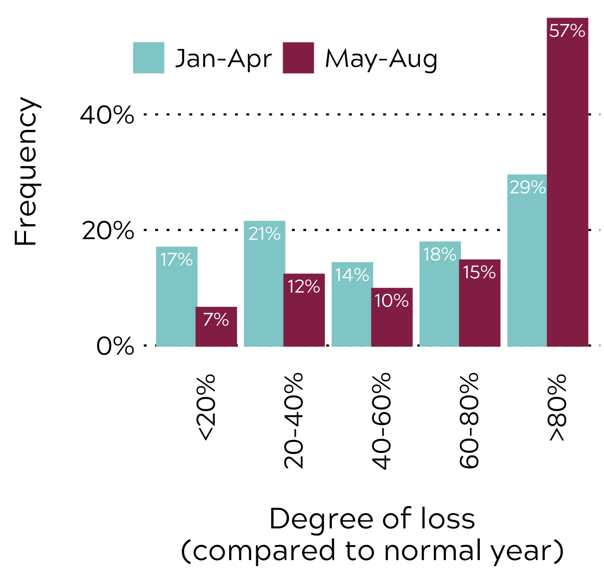
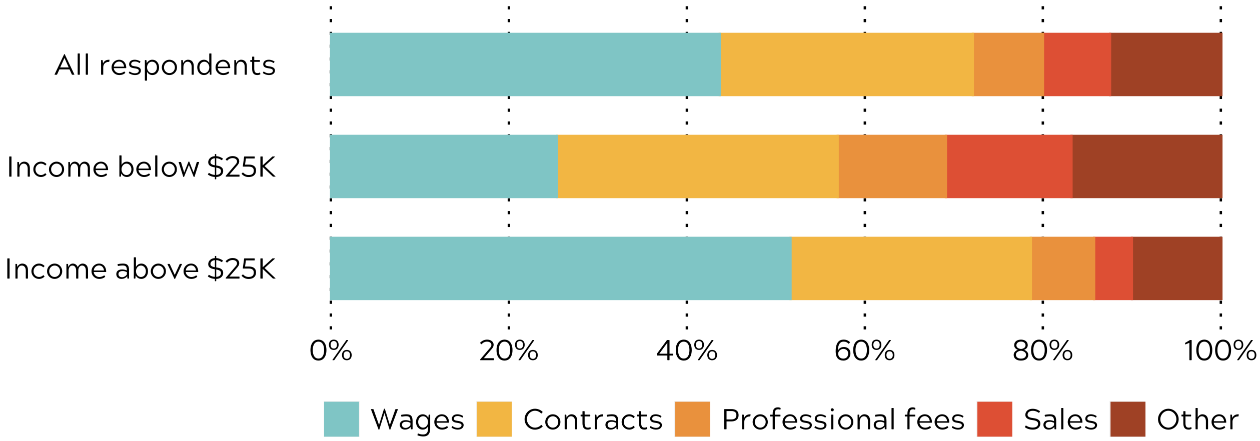


Figure 6: Income by source



Most respondents (two in every three) report that a significant portion of their income (at least 20%) comes from something other than a regular paycheque. Figure 6 shows the different sources that make up the income for individual survey respondents, with an average of 45% coming from wages, a similar amount based on freelance work and sales, and just over 10% from other sources including pensions. The figure indicates that the dependence on non-wage income is particularly strong amongst the respondents who make under $25,000/year. For this group, wages account for an average 25% of total income, compared to nearly 60% from freelance work and sales.[4]

Table 1: Income details by CERB status, two four-month periods in 2020

		Receiving CERB	Not receiving CERB
January – April	Lost income (average)	$5,782	$2,216
	Change compared to 2019 (average)	-51%	-37%
	Income received through CERB (average)	$4,275	$0
May – August	Expected lost income (average)	$10,271	$5,791
	Expected change compared to 2019 (average)	-79%	-57%
	Expected income through CERB (average)	$3,276	$0

At the time of the survey, less than half of the respondents (35%) were receiving the Canada Emergency Response Benefit (CERB), with a similar group indicating that they would not be eligible to receive the benefit. CERB was reaching the respondents whose incomes were most affected by the COVID outbreak, though the respondents not receiving this benefit were also reporting significant loss of income.

For the respondents who were receiving CERB, the benefit typically did not cover the full extent of the income lost due to COVID-19 (two in three respondents either reported losses not covered by CERB or broke even; one third reported that CERB benefits exceeded the losses they had experienced). The data show that CERB reached only a

[4] For survey data on the financial impact on freelancers in the sector, see ilostmygig.ca.

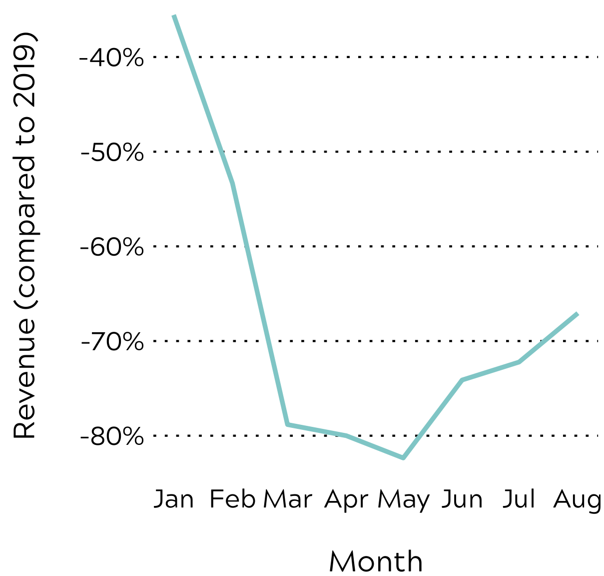
small number of the arts/culture workers who lost income due to COVID-19, and was not sufficient to cover the majority of the income lost even for those respondents who were able to receive the benefit. All in all, the data do not support the notion that CERB represented a windfall.

Impact on organizations active in the arts/culture sector

In addition to responses from the arts/cultural workforce, MAC surveyed organizations active in the sector. Nearly 150 organizations responded. The respondents in the sample run the gamut, from being volunteer-run to employing around 100 staff, and with annual revenues ranging from the tens of thousands of dollars to several million.

Over the first four months of 2020, organizations lost nearly half of their revenue(48%). For the period between May and August, responding organizations expect to lose 73% of their revenue. Figure 7 shows a loss of nearly 80% (compared to 2019) in the first months of the pandemic. As of May 2020, respondents completing the survey on behalf of organizations expected a gradual and slow recovery over the course of the summer. They did not anticipate that revenue would come close to even half of their 2019 levels.

Figure 7: Revenue as a percentage of 2019, (January – August 2020)



Almost all organizations (nearly 90%) will see their income for 2020 affected. As figure 8 shows, 60% of respondents in the survey expect to lose virtually all (at least 80%) of their revenue in the May – August 2020 period, with only 13% expecting little or no effect (losing under 20%).

The impact of COVID-19 is not limited to lost revenue. The organizations in the sample also indicate that they lost investments in on-going projects that could not be completed as a result of the pandemic. Since the start of the pandemic, two thirds of the responding organizations have incurred expenses that they cannot recover. Salaries and professional fees paid out in spite of cancellations represent roughly half of this loss (54%), with another 36% accounted for by logistical expenses (for instance, rentals, travel, and licensing). The average amount of unrecoverable expenses per organization is $33,000, with 8% of organizations reporting unrecoverable expenses over $100,000, another 15% indicating losses between $10,000 and $100,000, and 43% showing lost investments under $10,000.

Moreover, close to half of the responding organizations reported that they had incurred additional costs due to the pandemic. These increases (typically between $2,000-$3,000) were primarily caused by extra cleaning and sanitation (42% of all additional expenses).

The limited ability to continue activity given the public health measures in place, along with the sharply reduced revenue that this caused, have forced most organizations to lay off staff and to hire fewer freelancers. Of the organizations with paid staff (82%), about half have laid off some or all of their staff. As of May 2020, when the survey was in the field, the total workforce in the sector had decreased by 35% since the start of the pandemic. Over the first four months of 2020, organizations spent 21% less on salaries than they did in 2019, and on average, respondents expected to be at 75% of normal staff levels by August 2020.

In addition to paid staff, organizations in the arts/culture sector rely heavily on the labour of professionals who work freelance (84% of the organizations in the sample indicate that they hire people on a contract basis). Compared to payroll, expenses on professional fees were reduced even more: The amount spent on gigs worked by professionals went down by 40% during the first four months of the year. During the May-August period of 2020, respondents expect to be spending about one-third of what they spent on professional fees in 2019.

It is important to note, however, that the savings due to the reduced spending on payroll and professional fees do not typically offset the loss of

Figure 8: Degrees of income loss (organizations, two four-month periods in 2020)

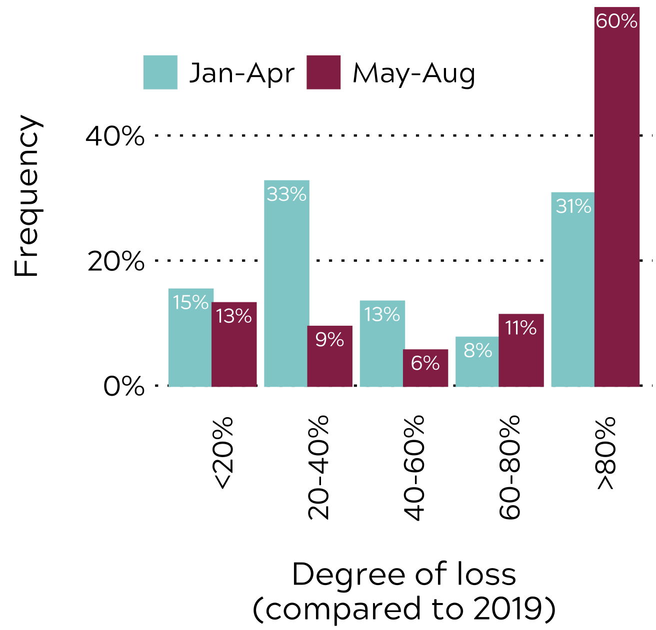
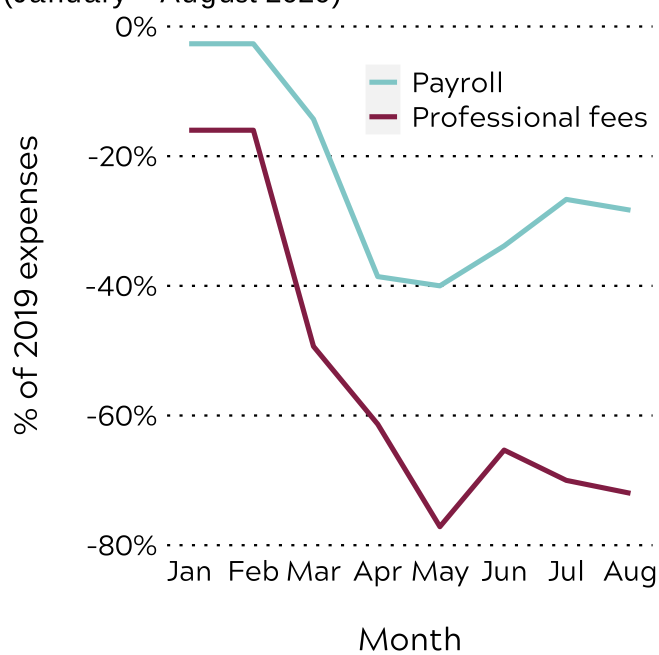


Figure 9: Payroll and professional fees (January – August 2020)



revenue due to restricted activity. For the January-April period, 86% of all respondents indicate that lost revenue exceeded any savings from reduced staffing costs and spending on freelance labour. Looking ahead to the May-August period, 82% of respondents similarly expect to lose more in revenue than they might save through reduced payroll and professional fees.

This balance of incurred losses and potential savings includes additional expenses incurred by the organizations in the sample, as well as any income gained through participation in the federal government's Canada Emergency Wage Subsidy (CEWS) program. In fact, the organizations in the sector are showing a limited ability to take advantage of this and other federal support programs.

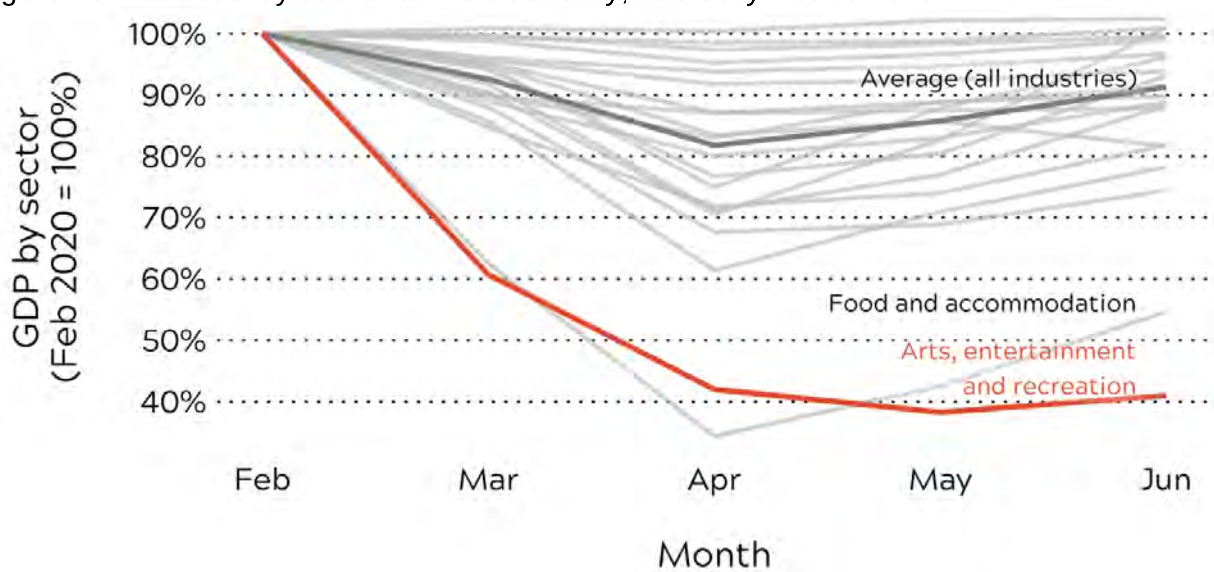
Of the responding organizations, 23% have applied for CEWS, which helps organizations re-hire laid-off staff or avoid lay-offs in the first place. Half of the organizations indicate that they would not be eligible to receive the benefit. The organizations that are not receiving the benefit have levels of revenue reduction and staffing decreases that appear similar to the organizations that <u>are</u> receiving the benefit.

Similarly, as little as 10% of responding organizations have received CEBA (Canada Emergency Business Account – a $40,000 interest-free and partially forgivable loan), whereas 52% indicate that they would not be eligible to receive the benefit.

Prospects for recovery

When surveyed in May, the majority of respondents expected that they would continue to lose income over the summer of 2020. They were uncertain about recovery towards the end of the year. Data from a variety of sources that have become available since May show that this expectation was accurate. Compared to the economy as a whole, decline in the arts/culture sector has been more profound and recovery has been slower than in any other sector with the partial exception of the food and hospitality industry.

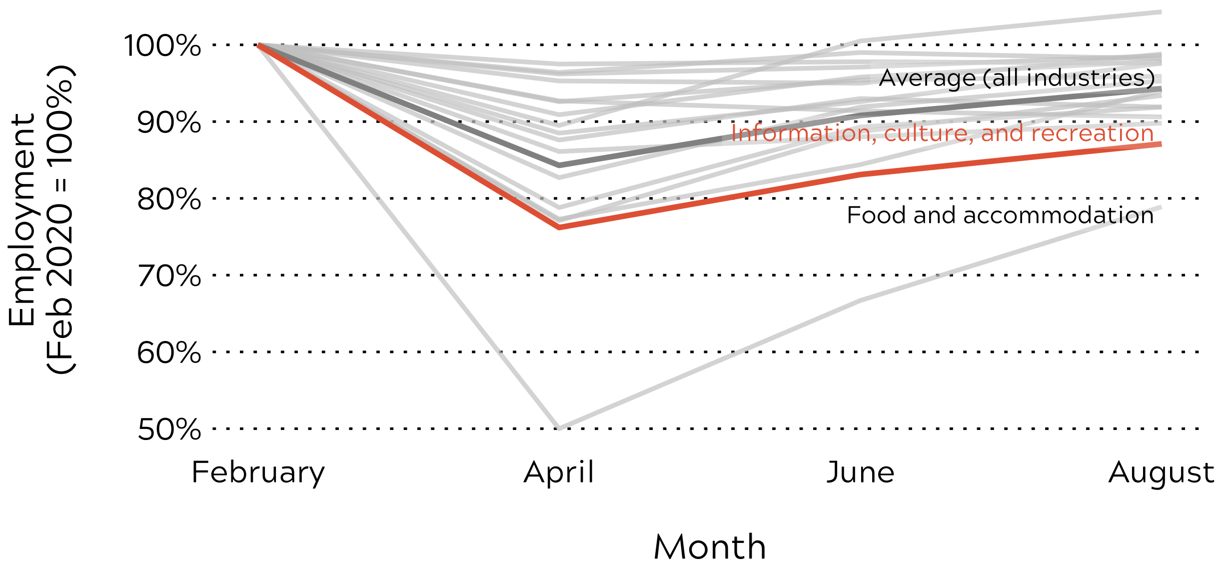
Figure 10: Revenue by sector of the economy, February – June 2020



First, Statistics Canada has recorded a sharp decline in revenue generated by the sector. During April, May, and June of this year, revenue in the arts/cultural sector hovered around 40% of February 2020 levels. This loss is greater than in any other industry, including accommodation and food services (in April 2020, this sector posted revenue at 35% of February levels, but since then it has recovered at a higher rate than arts/culture).[5]

Second, the impact of COVID-19 is reflected in loss of employment. The number of people employed in the arts/cultural sector decreased by 24% between February and April and climbed back up to 87% of pre-COVID-19 levels by August. As a comparison, employment overall declined by 16% between February and April of 2020, reaching 94% of February levels by August.[6] As figure 11 shows, loss of employment in the arts/culture sector (represented by the red line) is greater than that in any other sector except for Accommodation and Food Services.

Figure 11: Employment by sector of the economy, February – August 2020



These numbers paint a clear enough picture of the impact on the sector, but they obscure the true extent of job losses. For one thing, self-employed individuals are not included in these statistics. Moreover, Statistics Canada aggregates the arts/culture sector with telecommunications, a branch of the economy that has been thriving as consumers and corporations are pivoting to an on-line presence. If telecommunications were left out, figure 11 would offer a more accurate picture of the arts/culture sector, reflecting even starker levels of job loss and continuing under-employment.[7] Based on

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[5] Statistics Canada. Gross domestic product (GDP) at basic prices, by industry, monthly, available at https://doi.org/10.25318/3610043401-eng (as accessed on September 30, 2020).
[6] Based on numbers presented in the monthly Labour Force Survey (LFS), a Canada-wide survey based on a sample of over 50,000 households – see https://www150.statcan.gc.ca/n1/daily-quotidien/200904/dq200904a-eng.htm for the August results (most recent data available).
[7] To be exact, Figure 10 separates the Information and cultural industries (sector 51 according to NAICS, the North American Industry Classification System) and Arts, entertainment, and recreation

disaggregated data, the Canadian Association for the Performing Arts (CAPACOA) estimates true job losses in the sector at 40% during the April-June period, compared to 20% in the aggregated 'Information, culture, and recreation' sector.[8]

The data from the May survey suggest a number of factors that may explain why the arts/culture sector has contracted more than others and why it is recovering more slowly. Two things in particular are worth pointing out: how work in the arts/cultural sector is organized and how income in the arts/cultural sector is distributed over the year.

First, the survey data confirm what previous studies have already shown: income in the arts/culture sector is more likely to come from sources such as freelance work.[9] As a result, income in this sector is more vulnerable to economic downturns in general and the decline in economic activity caused by COVID-19 in particular. Freelance work – the most common source of income amongst artists and cultural workers – offers fewer long-term protections and guarantees than income from regular employment. That this part of the workforce is impacted in particular is also illustrated by findings from Statistics Canada, which indicate that a high share of self-employed Canadians continues to experience painful results, particularly in terms of reduced number of hours worked.[10]

I am an event producer specializing in mass gatherings. With social distancing and restrictions all my contracts had to cancel till 2021 and are still at risk even in that year. Smaller contracts of smaller gatherings are canceled and the winter season (my slower season) is still unknown. Projections right now are at $0 for the remainder of the year.

- Comment shared by a survey respondent

Second, the timing of the pandemic and the period in which the Manitoba public health measures were at their most restrictive coincides with the period that, for the sector as a whole, is the higher-earning period of the year. For both individuals and organizations in the sector, revenue tends to be irregular, with 75% of individual survey respondents indicating that their income 'varies greatly' over the course of the year. In particular, for both organizations and individuals, income tends to be concentrated in the March-September period. More than 70% of organization revenue is earned in that half of the year, compared to 30% in the other 6 months. Similarly, individual respondents expect an

(NAICS sector 71), whereas figure 11 combines those sectors. NAICS sector 51 includes telecommunications, data processing, hosting, and related services.

[8] Canadian Association for the Performing Arts (2020) 'Artists and cultural workers still among most impacted by the COVID outbreak', available at https://capacoa.ca/en/2020/07/artists-among-most-impacted-by-the-covid-outbreak/ (as accessed on September 10, 2020).

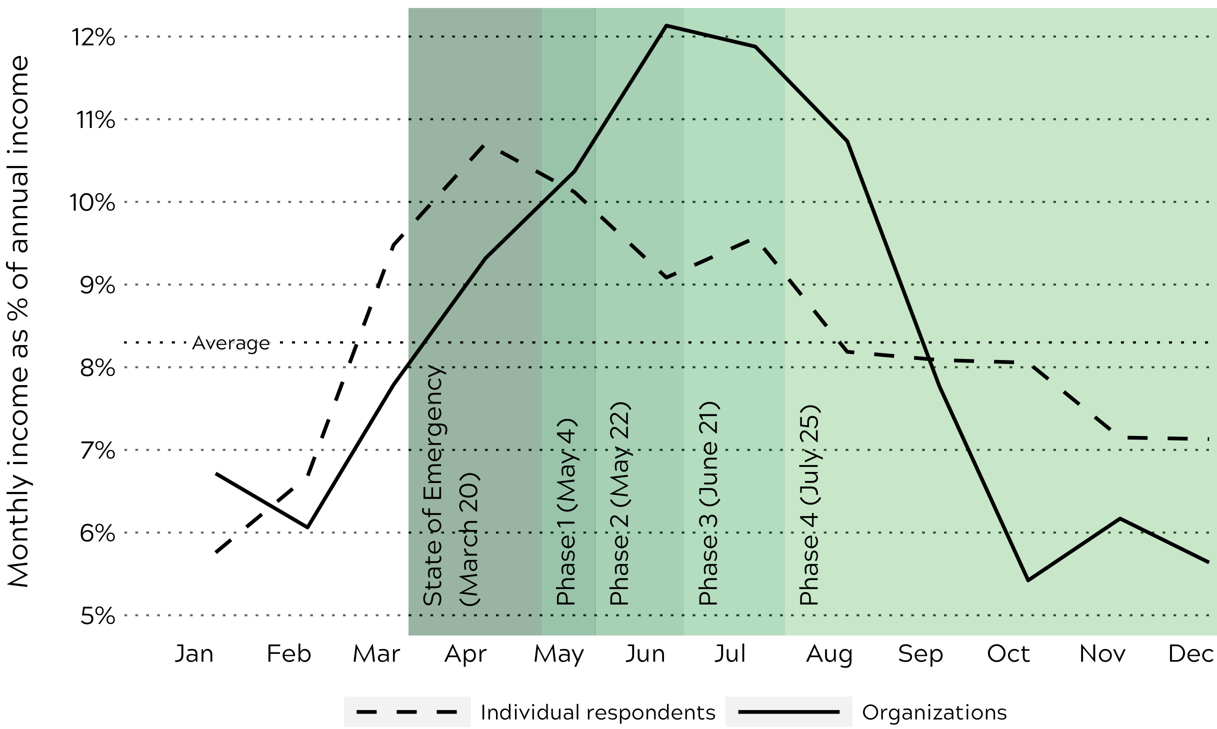
[9] See, for instance, Hill Strategies Research (2019) 'A Statistical Profile of Artists in Canada in 2016, with Summary Information about Cultural Workers', *Statistical Insights on the Arts* #49, available at https://hillstrategies.com/ (as accessed on September 10, 2020).

[10] The August 2020 Labour Force Survey report states that "In August, 24.2% of the solo self-employed worked less than half of their usual hours, much higher than the share for employees (5.7%), but an improvement compared with 54.5% in April." Statistics Canada (2020) 'Labour Force Survey, August 2020', available at https://www150.statcan.gc.ca/n1/daily-quotidien/200904/dq200904a-eng.htm (as accessed on September 10, 2020).

average of 65% of their income during the March-September period, compared to 35% in the other 6 months.

Figure 12 shows that the pandemic outbreak and the public health response in Manitoba overlapped with the higher-earning season in the arts/cultural sector, further adding to the scope of the economic impact of COVID-19. A state of emergency was introduced in Manitoba on March 20, 2020, and while services were gradually restored over the months that followed (see table 2) as the province reopened, in many cases this happened too late for arts/cultural activity to resume.

Figure 12: Distribution of individual income and organizational revenue over the year



A third important explanation for the far-reaching impact of COVID-19 on arts and culture is that a broad range of revenue-generating activity in the sector involves public gatherings. The sector is among the first to close and among the last to open, and relies heavily on activity that is restricted by public health measures put in place to curb the spread of the virus. Even as Manitoba reopens, much of this activity remains out of reach for a number of reasons.

When will large gatherings be allowed - and will patrons feel safe enough to return to large venues? I suspect for many cultural workers like myself, the worst is around the corner.

– Comment shared by survey respondent

Although subsequent phases of Manitoba's recovery introduced a gradual return to normal, a large portion of typical artistic and cultural activity is still not appropriate. Phases 1-4 have allowed for film productions to resume and for museums, galleries, and libraries to reopen, but this leaves a wide range of events that involve audiences out of reach. And where some of the reopening measures technically permit the development of projects that involve some public gathering, in practice, such initiatives may not be feasible or viable.

Insecurity about the future complicates large scale planning. Whether it is an outdoor festival or a staged production, key events put together by the arts/cultural sector require months of preparation and the coordination of dozens if not hundreds of staff, contractors, and volunteers. In the current environment, health directives are ever-changing and any progress made towards recovery is fragile. These conditions, in which months of work risk last-minute cancellation, are not conducive to organizing anything of a major scope.

Table 2: The reopening of Manitoba[11]

	Introduced as of	Impact on arts/culture sector
State of emergency	March 20, 2020	Public gatherings limited to 10 people; Closure of non-essential businesses; Limitations on travel from other provinces and territories;
Phase 1	May 4, 2020	Reopening of museums, galleries, and libraries;
Phase 2	May 22, 2020	Max gathering size increased to 25 (indoors)/50 (outdoors), provided social distancing guidelines can be followed; Film productions resume operations;
Phase 3	June 21, 2020	Max gathering size increased to 50 (indoors)/100 (outdoors), provided social distancing guidelines can be followed; No self-isolation required for travellers from Western provinces, the territories, and North-Western Ontario;
Phase 4	July 25, 2020	Stage performances to resume for audiences up to 30% of venue capacity to a maximum of 500 people, provided social distancing guidelines can be followed;

Moreover, any organizer who accepts this risk still needs to face the reality that, given the public health measures currently in place, it may not be possible to develop a project that generates enough revenue to break even. For instance, while Phase 4 of Manitoba's reopening allows for stage performances to occur, it caps attendance at 30% of capacity (to a maximum of 500 people). Being able to collect only 30% of the revenue normally earned through seat sales makes it difficult for performances to be viable. While the restrictions are a necessary tool to combat the spread of the virus, the plans to restore services and reopen the sector present considerable if not insurmountable practical limitations on what is financially possible. Anecdotally, Manitoba-based performing arts organizations indicate that the current restrictions prevent them from preparing a season of performances and that venue occupancy would need to be at levels around 70% (rather than the 30% currently allowed) in order to break even. In the case of the

[11] Government of Manitoba (2020) 'Restoring Safe Services', available at https://www.gov.mb.ca/covid19/restoring/index.html (as accessed on September 15, 2020)

Centennial Concert Hall in Winnipeg, the 500-person maximum represents an effective cap of 22% of the maximum capacity of 2,305.

Even where guidelines are followed, audiences are reluctant to return. Data collected by the Ontario Arts Council in collaboration with the Audience Outlook Monitor project (an international research collaboration that studies how comfortable audiences are when it comes to returning to their seats) shows that the majority of respondents are not comfortable attending events in indoor venues, even with social distancing guidelines in place. A large proportion of the respondents in the OAC survey are adopting a wait-and-see approach, waiting for a vaccine before they go back to attending arts/culture events.[12]

Conclusion

In sum, the findings from the May survey show widespread financial impact on arts and culture in Manitoba, affecting nearly everyone in the sector. In addition, the data suggest that some of the arts/cultural workforce as well as a large number of arts/cultural organizations may be unable to access federal programs such as CERB and CEWS. At the time of the survey, respondents were generally pessimistic about recovery during the remainder of 2020 and developments since then have proven those expectations to be accurate. Economic decline in the arts/culture sector has been more profound than elsewhere and recovery has been slower, with the partial exception of the food and hospitality industry. Data from the survey suggest that the comparatively high rate of self-employment in the sector as well as the seasonal nature of economic activity (with the summer typically the high-earning period) have exacerbated the impact of COVID-19. In addition, large portions of the sector rely on public gatherings that are first-to-close, last-to-open. These activities remain out of reach because they are not safe, not feasible, and not viable – and even if they were, until there is a vaccine for COVID-19, audiences are reluctant to return to their seats.

[12] Audience Outlook Monitor (2020) 'Ontario Research Notes for Wave 1 (June 15)' available at https://www.audienceoutlookmonitor.com/ontario-arts-council (accessed on September 10, 2020).

Methodological appendix

To draw a large and representative sample, the Manitoba Arts Council not only polled its existing client base but worked with organizations throughout the sector to recruit respondents. By doing so, this survey aligns with the framework developed by Statistics Canada for the Cultural Satellite Account (CSA), a tool used to gauge the economic impact of arts and culture in Canada. This framework encompasses a wide range of economic activity, including heritage and libraries, live performances, visual and applied arts, writing and publishing, audio-visual and interactive media, sound recording, cultural education and training, and sectoral support and governance services. According to the most recent Provincial and Territorial Culture Indicators published by Statistics Canada in April 2019, the arts/culture sector in Manitoba is a $1.6 billion industry that represents 2.4% of Manitoba's economy (by GDP) and employs more than 20,000 people.[13]

Selected survey participants were approached with a bilingual (English/French) email invitation that included a link to the survey, which was hosted by SurveyMonkey. Due to the short lead time available prior to launching the survey, MAC was unable to provide alternative forms of accessing the survey.

To prevent duplicate responses, recipients were asked to complete only one survey. In addition, email recipients were asked not to share the survey link on social media to limit responses to those who are actually active in the arts/culture sector.

Survey responses are anonymized and treated confidentially. To prevent multiple survey responses submitted by the same individual, SurveyMonkey records the IP address for the device used to complete the survey, but no other identifying personal information was collected. In this report, only aggregate findings are presented, with the exception of individual comments shared by respondents. Those comments are only included in this report if the respondent gave explicit permission for MAC to do so. They are presented anonymously, and do not contain any information that could be used to identify who shared the comment.

To give respondents control over the amount of time spent on the survey and over the level of detail shared in their responses, the survey used a choose-your-own-adventure method. This gave participants the choice between providing either detailed, month-by-month information about their current financial situation, or more general, less granular information (or: no information at all). In both the individual and the organizational survey, around half the respondents selected the general path, with the other half split roughly equally between the detailed path and the option of skipping all questions about their financial situation.

[13] Statistics Canada (2019) 'Provincial and Territorial Culture Indicators, 2017', available at https://www150.statcan.gc.ca/n1/daily-quotidien/190425/dq190425b-eng.htm (as accessed on September 30, 2020). For more on the Cultural Satellite Account, see https://www.canada.ca/en/canadian-heritage/corporate/publications/general-publications/culture-satellite-account.html.

Table 3: Choose your own adventure

Survey option	Individuals	Organizations
I would like to answer some detailed questions about my income	23%	24%
I would like to answer some general questions about my income	48%	54%
I prefer not to share information about my income	28%	22%

Where possible, the detailed responses were converted and merged with data from respondents who selected the general information path. As an example, figure 3 is based on data provided by individuals completing the detailed path and answering month-by-month questions. Meanwhile, figure 5 shows information for two four-month periods and is based on responses from both the general path and the detailed path.

ABOUT THE MANITOBA ARTS COUNCIL

The Manitoba Arts Council is an arm's-length agency of the Province of Manitoba, established in 1965 "to promote the study, enjoyment, production and performance of works in the arts." The Council makes awards to professional arts organizations and individuals in all art forms including theatre, literature, dance, music, painting, sculpture, architecture or the graphic arts, and includes other similar creative or interpretative activity, including arts education.

The Council uses a peer assessment process in making awards. Historically, the main criterion used to assess applications is artistic merit.

The Council is funded through Manitoba Sport, Culture and Heritage. Council reports annually through the Minister of Sport, Culture and Heritage to the Provincial Legislature in its Annual Report , and Council operations are audited annually.

The Manitoba Arts Council acknowledges that it carries out its work on the land of Indigenous nations throughout Manitoba. Our office is located on Treaty 1 territory, the ancestral lands of the Anishinaabe, Ininew, Cree, Oji-Cree, Dakota and Dene Peoples and the homeland of the Metis Nation.

PHOTO CREDIT:

INVITATION – A SOCIALLY DISTANT PERFORMANCE INSTALLATION BY HUGH CONACHER, LARA RAE AND CAMILA SCHUJMANI.
PHOTO BY COLIN CORNEAU.

JORDAN MILLER, *GENTLE BREEZE*, 2020, EMBROIDERY THREAD AND ACRYLIC ON CANVAS, 30" X 40"

BOTH PROJECTS SUPPORTED BY MAC'S SHARE - CONNECTING AT A DISTANCE PROGRAM